

# AUTOMATION NOW & NEXT 2022

State of Intelligent Automation Report  
**3rd Edition**

RELEASED  
**September 2022**



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# Introduction

Welcome to the third edition of **Automation Now & Next**, the only report of its kind reflecting the global state of automation.

**Automation Now & Next 2022** provides insights unavailable from any other data set as it is tightly focused on intelligent automation and how businesses are embracing—and succeeding—in the Automation Economy. This is a unique and comprehensive look at the efforts, experiences, and projections of more than 1,000 automation leaders and more than 3,800 Automation Anywhere customers—nearly 5,000 voices from across industries and regions. Since this report is the third edition, we can also now discern meaningful trends and shifts in how organizations are using automation today and plan to use it in the future.

In this **Automation Now & Next 2022** report, you'll discover:



**The current market landscape** in which organizations are operating.



**How organizations have embraced automation** to overcome business challenges, spur innovation, and create new growth opportunities.



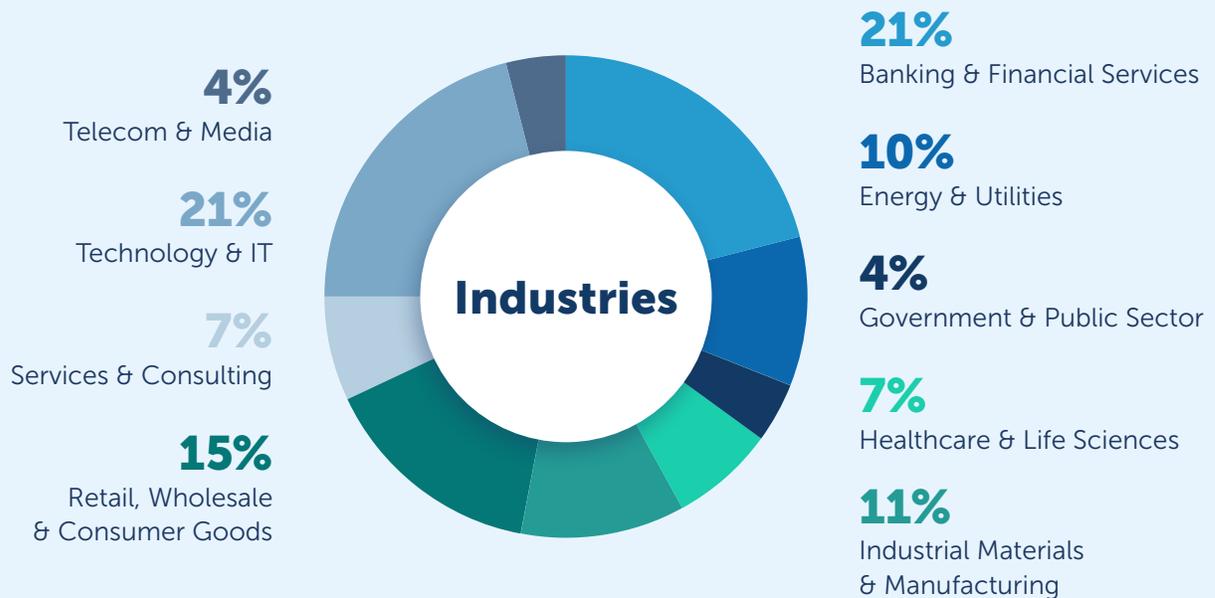
**How organizations intend to scale** their automation programs in 2022 and beyond.



**Automation strategies and tactics** used by top-performing organizations.

# Methodology

**Automation Now & Next 2022** presents key findings from global research performed by Futurum Research, an independent research and analysis firm. It surveyed automation professionals from North America, Europe, and Asia whose organizations are actively evaluating and/or deploying intelligent automation. Respondents represented organizations of all sizes and industries. They included technical professionals responsible for the planning, implementation, or management of IT, automation, or digital transformation initiatives or non-technical business and operational leaders in roles such as corporate operations, human resources, finance, product development, manufacturing, sales, marketing, or customer support.



The Automation Now & Next 2022 survey was conducted in April and May 2022. Survey respondents were directed to consider "now" as the preceding 12-month period of June 2021 to May 2022 and "next" as June 2022 and beyond.

## NOW

June 2021 to May 2022



## NEXT

June 2022 and beyond

To see the demographic breakdown of survey respondents, [jump to the report appendix.](#)

# Executive Summary

At the publishing of this report in August 2022, the global economy remains in a state of uncertainty. Labor constraints, public health concerns, and supply chain challenges continue while inflation, global conflicts and climate change, and sharply rising interest rates increase the likelihood of a recession. As a result, many organizations still struggle to hit their product, service, and customer experience goals.

Given the environment, it is no surprise that 92% of respondents say their organizations have, in the past year, somewhat or strongly adjusted automation plans in response to global events. Where and why they have adjusted relates to three key themes:

## 1 BUSINESS CONTINUITY: Sustainable Business Performance Relies on Intelligent Automation

The continuing pandemic and its continuing fallout has pushed organizations to accelerate their automation plans to better manage business challenges. The key trends influencing automation strategies include:

- **Disruption avoidance:** Automation enables continuity during disruptions such as supply chain issues, worker shortages, and logistical roadblocks by filling gaps in operations and customer experiences.
- **Labor shortage mitigation:** Where some organizations myopically viewed automation as a way to eliminate headcount, most now view it as a strategic solution to staffing shortages through improved worker satisfaction and retention.
- **Increased (and proven) ROI:** The average return on investment has more than doubled to 6.8x, illustrating that automation is a worthwhile and dependable investment even in times of economic austerity.

## NOW

More organizations see automation as a core component of ongoing business operations rather than a pinpoint remedy to a tactical challenge.

### The top business benefits achieved last year due to automation deployments were:

1. Productivity improvement
2. Higher-value work for employees
3. Reduced cost



## NEXT

Organizations plan to continue investing in automation as a catalyst of business performance.

### The top business benefits achieved this year due to automation deployments are:

1. Business reduced operating costs
2. Enhanced business continuity
3. Improved employee experiences

# 2

## AUTOMATION SCALE: Flexible Cloud Technologies and Easy Employee Access Are Essential for Automation Success

The cloud has changed everything, including automation’s deployment speed, scalability, and value. It’s also providing a springboard for organizations to make automation easier for non-developers, make it relevant and useful for business users, and make it available to solve new use cases in every department. The key trends influencing automation scalability are:

- **Cloud speed and scale:** Every industry is moving to cloud-native automation solutions for speed to scale, continuous agility, lower TCO, and to meet rapidly-changing security and compliance requirements.
- **More citizen developers:** Labor shortages and the desire for rapid scale have increased the need for democratized automation deployment when and where professional developers are unavailable.
- **Widespread adoption:** When integrated into an organization’s everyday business, automation alleviates job-replacement fears and gives business users ownership of productivity gains.

### NOW

The cloud is accelerating automation deployments and empowering (and easing recruitment of) citizen developers.



### NEXT

Nearly all organizations will move to cloud automation to reach adoption, deployment, and transformation goals.

# 3

## ENTERPRISE-WIDE TRANSFORMATION: Requires Coordinated Automation Investments to Reach Performance Goals

Organizations clearly see the financial value and performance benefits of automation, but they are also understanding that transformational success from automation requires an enterprise-wide strategy. The key trends influencing automation growth are:

- **Centralized operations:** Replicable and well-defined frameworks for enterprise-wide automation adoption and scalability are required to move beyond shadow or narrowly focused programs.
- **Expanded targeting:** Nearly one-third of regular work activities across front-and back-office functions can be automated, which requires a coordinated automation effort.
- **Increased budgets:** Automation budgets will continue to increase for faster scale and benefits realization to meet automation and digital transformation goals.

### NOW

Organizations have realized the need for a coordinated effort to expand and scale their efforts, but they need the budget to do it.



### NEXT

More than three-quarters say they plan to increase budgets for the next 12 months, with almost a quarter (24%) expecting to increase budgets by 25% or more.

# Traits of Top Performing Organizations

Included in Automation Now & Next 2022 is an analysis of an elite group of automation leaders. We've been able to identify common traits and characteristics of top-performing organizations with respect to automation. Stark differences are apparent in their areas of investment, automation culture, and aggressive plans for the future. Top performers achieve a higher ROI from automation (8.5x vs. 6.3x) and higher average automation performance benefits (more than 70% improvement vs. under 50%). Data from top performers serves as best-practice guidance for less mature organizations looking to understand how to build or scale their automation programs.

## Top Performers Achieve Superior Results

**8.5x** Average financial ROI

**74%** Average improvement in productivity

**71%** Average work effort (time) savings

**74%** Average improvement in quality & accuracy

**8.5x vs 6.3x**

**Higher ROI**  
from automation

### Top Performers Invest in Intelligent Automation

**72%** (vs 48%) have made intelligent automation a priority for the coming 12 months

### Top Performers Use a Centralized Approach

**84%** (vs 60%) have implemented a centralized approach to automation planning

### Top Performers Leverage Automation Across the Enterprise

**77%** (vs 52%) are actively scaling automation across the enterprise versus siloed programs within single departments

#### Definition of Top Performers

##### Maturity

Top performers must have at least two years of automation implementation experience (to assure valid results in other areas).

##### Benefits and ROI

Top performers must outperform overall average returns across all four measured metrics to demonstrate meaningful business value:

- Financial ROI  $\geq$  6.6x
- Workforce Savings > 50%
- Productivity Improvement > 50%
- Quality Improvement > 50%

##### Confidence

Metrics alone may not tell the whole story—we're interested in those whose own perspective of their results allows them to state they consider themselves industry leaders in the adoption of automation technologies.

# BUSINESS CONTINUITY:

## Sustainable Business Performance Relies on Intelligent Automation

### NOW

More organizations see automation as a core component of ongoing business operations rather than a pinpoint remedy to a tactical challenge. Nearly all (94%) of respondents say automation is helping address supply chain issues and 61% strongly agree automation has helped address staffing shortages, which both help organizations overcome disruptions and continue delivering great customer experiences. This translates into real business benefits, too, with the average ROI of automation projects more than doubling to 6.3x over the previous year. It also proves the financial value of automation even in the face of macroeconomic headwinds and has pushed more than half (53%) of respondents to shift their near-term focus away from automation ROI to performance goals and benefits.

#### Key Trends:

- **Disruption avoidance**
- **Labor shortage mitigation**
- **Increased (and proven) ROI**

### NEXT

Organizations plan to continue investing in automation as a catalyst of business performance. Nearly three-quarters of respondents say they can automate at least 30% of work, meaning nearly one-third of organizational effort can be refocused on higher-value work. And, with the ROI of automation proven and exceptional, 78% say they're moving past a scrutiny of financial returns and planning to use automation to improve long-term operational performance. In the next 12 months, 77% of organizations will increase their automation budgets with 24% eyeing an increase of 25% or more.

### NOW

**61%** Automation helping address **staffing issues**

**45%** Helping address **supply chain issues**

**30%** Share of regular work activities that can be **automated at most organizations**



### NEXT

**94%** Moving employees to **higher-value work** is a top priority for the coming year

**78%** Shifting focus to **improving long-term operational performance** and away from ROI

**52%** Becoming more important in **meeting customer needs**

# AUTOMATION SCALE: Flexible Cloud Technologies and Easy Employee Access Are Essential for Automation Success

## NOW

Ninety-three percent (93%) of those surveyed have moved to cloud or hybrid cloud deployments with 50% using a pure cloud strategy, 43% taking a hybrid approach, and just 7% sticking with on-premises deployments. That last group is way down from last year's survey, where 36% of respondents said they were considering on-premises bot deployments. The cloud is helping to democratize automation deployment by making it faster and easier, which empowers business users to build and run Digital Co-Workers on their devices. Respondents overwhelmingly (84%) support the idea of citizen developers, especially as IT and automation teams are often short-staffed amid increasing usage of digital devices and the acceleration of digital transformation initiatives.

### Key Trends:

- **Cloud speed and scale**
- **More citizen developers**
- **Widespread adoption**

## NEXT

Organizations will continue moving to the cloud as 93% have established cloud-first mandates for all new automation initiatives. The cloud is clearly speeding deployments, too, as bot deployment is outpacing projections: just 24% of respondents projected last year that they'd have more than 100 bot deployments by mid 2022. In reality, 49% of respondents this year did deploy 100-plus bots—more than double their projections. Two-thirds of respondents project they will hit 100-plus bot deployments within the next 12 months, but we expect the actual number of deployments to again outpace projections. Here's why: 37% say that training citizen developers is a top-five priority, 39% say they support enabling business users to design, code, and implement RPA bots, and 42% expect to deploy a minimum of 300 RPA bots within the next 12 months.

## NOW

**93%** Using **cloud or hybrid automation** deployments

**84%** **Support the idea** of citizen developers

**133%** **Year-over-year increase** in organizations actively scaling automation across the enterprise



## NEXT

**93%** **Cloud-first mandates** for all new automation initiatives

**37%** Training citizen developers is a **top-five priority**

**42%** Expect to deploy a **minimum of 300 RPA bots** within the next 12 months

# ENTERPRISE-WIDE TRANSFORMATION: Requires Coordinated Automation Investments to Reach Performance Goals

## NOW

Nearly all (95%) of those surveyed consider intelligent automation a key component of their ongoing digital transformation strategies. These experienced (80% have been using automation for 2+ years) organizations have realized the need for an orchestrated effort to expand and scale their efforts: 63% depend on a centralized IT/automation team to plan enterprise-wide automation. Organizations are now rapidly expanding their automation focus. Those actively scaling automation efforts reached 56%, which more than doubled from last year's 24%. Just 8% are focused on deploying intensively in a single business unit or team. To enable automation expansion, 24% expect to significantly increase automation budgets in the coming year.

### Key Trends:

- **Centralized operations**
- **Expanded targeting**
- **Increased budgets**

## NEXT

Seventy-eight percent (78%) of respondents say their organization plans to increase budgets for the next 12 months, with almost a quarter (24%) expecting to increase budgets by 25% or more. Top areas targeted for automation over the coming year include IT/data management (tagged by 74% of respondents), customer service and support (38%), finance (27%), human resources (26%), and marketing and sales (25%). The intent is to create a cohesive effort powered by the collaboration of humans and Digital Co-Workers, with 95% of respondents projecting that intelligent assistants will play an important part in current and upcoming future-of-work strategies and 52% strongly agreeing on the value of intelligent assistants (RPA-based chatbots) to help employees work smarter and make better decisions. But, respondents also selected their top two needs to bring these visions to reality: (1) additional budget resources and (2) additional executive support or vision for intelligent automation.

## NOW

**95%** Intelligent automation is a **key component of digital transformation** strategies

**63%** Depend on a **centralized IT/automation team** to plan enterprise-wide automation

**48%** Improvement in effort reallocated to **higher-value work**



## NEXT

**74%** Automation for IT and Data Management is a **top priority over next 12 months**

**78%** Plan to **increase automation budgets** for the next 12 months

**52%** Strongly agree **intelligent assistants help employees work smarter** and make better decisions

# Automation Works!

Average Results Achieved Per  
RPA Bot Implementation:

**48%** Improvement in  
**effort reallocated to  
higher-value work**

**50%** Improvement in  
**productivity**

**50%** Improvement in  
**quality and accuracy**

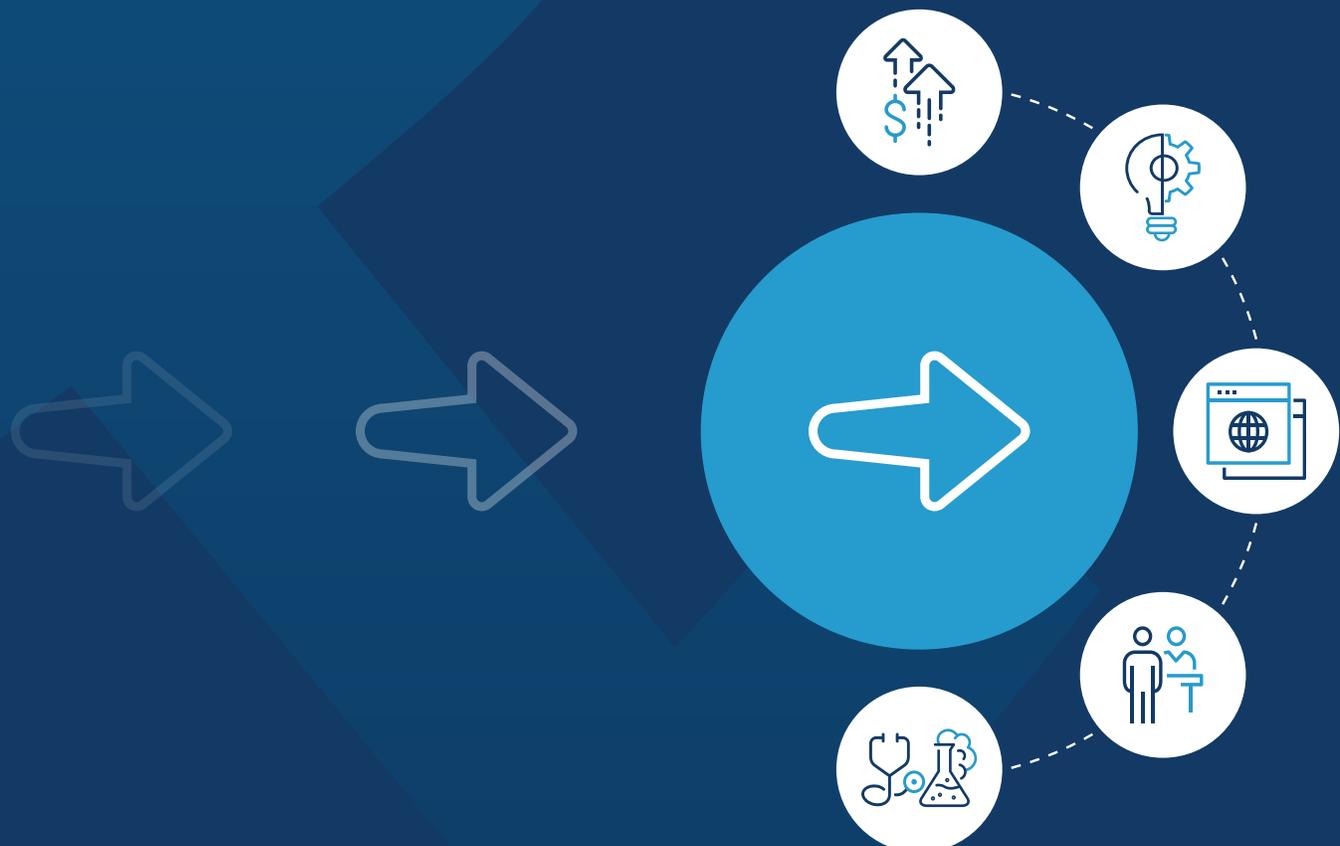


# Predictions for Automation Success in 2023

In the Automation Economy, successful automation programs have become a vital component of modern business success. The pandemic compressed years' worth of digital transformation into months, accelerating the automation imperative. Now, as organizations have seen the value of automation in pinpoint applications, they have broadened its usage to target today's pressing issues such as supply chain disruptions and worker shortages. That has only given more teams across more areas of the organization a clear view of automation's potential, which has, in turn, increased demand from business teams.

## That Was Then. Looking Forward, This Report's "NEXT" Becomes the "NOW."

Today, organizations are leaning on automation to sustain business operations through economic chaos and uncertainty. They are taking a strategic, centralized approach and investing more resources, so more departments can realize more value from automation. And, they are moving to the cloud to reduce the total cost of ownership, accelerate these efforts, and encourage even more widespread adoption of automation at every level.



# So What Is NEXT?

We see more organizations making automation a critical element in all aspects of their business. Automation will be considered in the annual operating plan and operations optimization as it will be in risk-mitigation strategies and accelerating sales cycles. Automation will continue to help IT but will also be put to use across every department to increase marketing effectiveness and financial reporting speed.

Here are our predictions for automation success in 2023, along with guidance on moving your organization in this direction:



## Predictions

- More organizations **will develop a central or federated CoE automation success model** supported by a joint technical and business team.
- Automation efforts will be linked to **business transformation goals.**
- Nearly all organizations will move to a **cloud-first automation approach.**
- Organizations will initiate training programs to **engage, excite, and create more citizen developers.**
- Centralized automation teams will **accelerate automation adoption** with internal marketing programs aimed at business users.



# Tips for Getting There

## BUILD YOUR AUTOMATION PROGRAM

- Identify an executive sponsor that **understands and evangelizes the potential of automation**—and one who has budget influence.
- View automation as a joint-program **between business and IT.**
- Technology leaders should partner with **business leaders** to develop shared goals.
- Define **clear, replicable performance KPIs.**
- Start all new **initiatives on the cloud.**

## SCALE ACROSS TEAMS

- Develop a plan to **migrate existing on-premises tools and automations** to cloud over time.
- Develop a **formal citizen development program** with training and governance.
- Provide incentives for motivated **employees to up-skill and contribute** to automation success.
- Create ways to **crowdsource and share automation ideas** from employees.

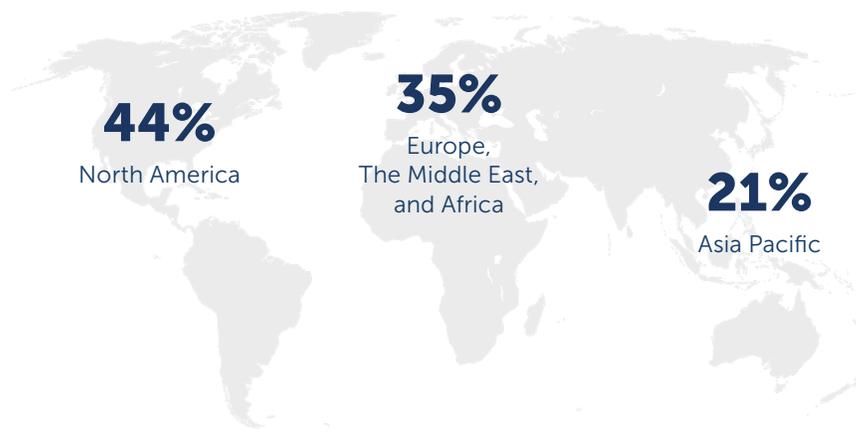
## TRANSFORM THE ENTERPRISE

- Ensure that **employee engagement and customer satisfaction** are key metrics.
- Drive understanding around the **benefits of Digital Co-Workers.**
- Empower every employee with helpful Digital Co-Workers that allow them to **focus on higher-value work.**

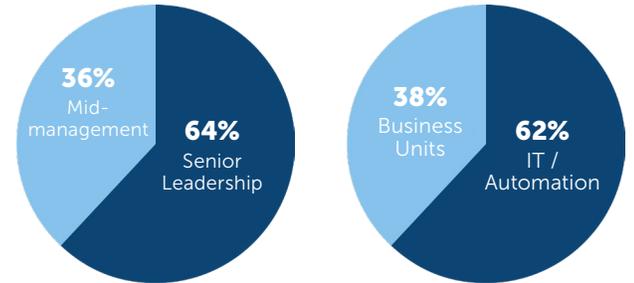
# Survey Demographics

The demographic breakdown of respondents to the Automation Now & Next report is as follows:

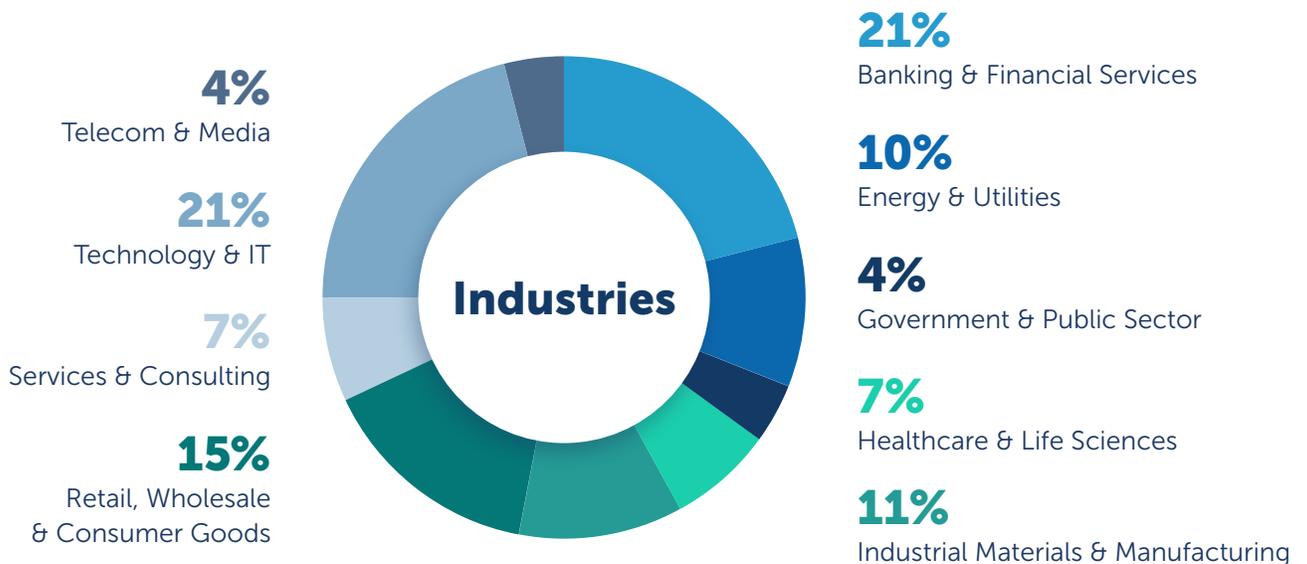
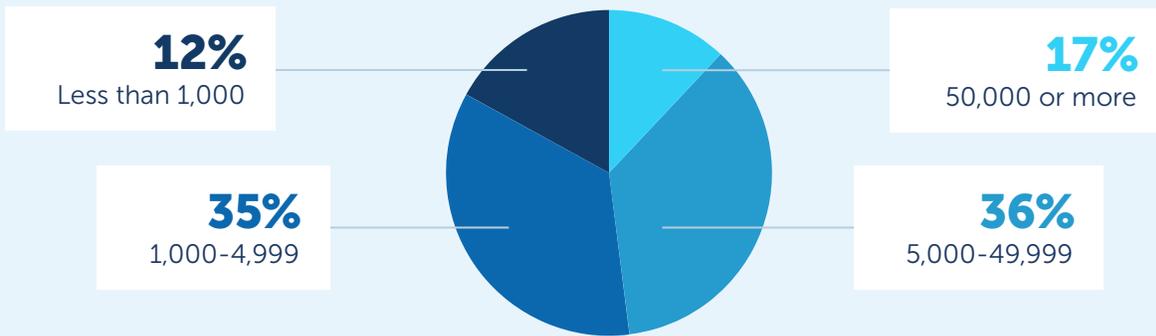
## Regions



## Role and Focus



## Company size by number of employees



# Key Terms

## Automation

For this report, automation refers to Robotic Process Automation (RPA) and intelligent automation, along with the systems, solutions, and technologies required to support the development and deployment of bots.

## Robotic Process Automation (RPA)

RPA enables you to create software robots (“bots”) that are programmed to “observe” and mimic human digital actions. Bots observe typed text, commands, menus clicked, and other actions performed via a keyboard and mouse/trackpad, and then the bots replicate those actions to complete tasks. RPA is best for repetitive, rule-based digital processes with structured data.

## Intelligent Automation

Intelligent Automation (IA) (also referred to as hyperautomation) is the combination of various automation technologies like RPA, artificial intelligence, machine learning (ML), intelligent document processing (IDP) and process discovery to assist human workers and automate processes that deliver a high ROI and ultimately business transformation. RPA is the core technology and root of the broader intelligent automation category that has since expanded to include adjacent technologies, as well as human-in-the-loop processes that empower business users.

## Digital Assistants

Digital assistants help manage mundane day-to-day tasks so that workers can be more productive. Any process that involves tedious, repetitive, manual steps can be enhanced with intuitive screens and trigger automations based on worker actions, IVR sequences, application interactions, after-call requirements, and more. While RPA bots can perform parts of a workflow, intelligent digital assistants work with their human counterparts to complete a workflow.

[Learn more.](#)

## Attended Automations

Attended automations are designed to assist an individual worker with a task that is part of a larger process with the end goal of helping them work faster and with more accuracy for an overall increase in productivity. Attended automations involve a human-in-the-loop, where the individual worker either provides an input, reviews data for accuracy and validation, or receives an output of data that is crucial for completing a process offline such as handling a customer service inquiry.

## Unattended Automations

Unattended automations work on their own. The aim for many business processes is end-to-end automation, where bots are enabled to execute an entire task independently.

# Key Terms

## Automation Leaders

Automation leaders are individuals who are charged with overseeing the development, management, and scale of a company's automation program—sometimes referred to as an automation center of excellence (CoE). They may sit inside of an IT organization or in a line of business and may lead one of multiple automation programs across an enterprise. They may be charged with implementing automation programs that drive business objectives, which may include creating process efficiencies, reducing costs, or improving the employee experience—all of which lead to broader enterprise transformation goals.

## Business Leaders

Business Leaders seek to adopt intelligent automation to drive specific business objectives such as creating process efficiencies, eliminating costly human error, reducing costs, or improving the employee experience by offloading tasks—all of which lead to broader enterprise transformation goals. Business leaders will partner with automation leaders to develop automation initiatives that will help meet these goals and lead change management initiatives to drive adoption among teams.

## Automation Centers of Excellence

An automation center of excellence is a core team or program charged with overseeing the development, management, and scale of a company's automation program. The automation CoE may sit inside of an IT organization or in a line of business and may be one of multiple automation programs across an enterprise. They may be charged with implementing automation programs that drive business objectives that may include creating process efficiencies, reducing costs, or improving the employee experience—all of which lead to broader enterprise transformation goals.

## Centralized Center or Excellence Approach

Many automation CoEs are centralized, meaning they operate as the singular governing automation CoE within an organization, supporting automation initiatives across every team or line of business. Benefits of a centralized approach include tighter governance and security controls and a consistent methodology and processes that can be replicated across automation initiatives. Centralized CoEs can run into barriers to scale as demands from business units can outweigh the resources that a centralized CoE may be able to provide.

## Federated Center of Excellence Approach

Many automation CoEs are federated, meaning they operate as a distributed network of automation teams and programs across various lines of business, working with the singular governing body that sets standard operating procedures and generally sits within central IT. Benefits of a federated approach include the ability to scale quickly, the proximity to the business (and therefore a deeper understanding of business goals), and the ability to pivot quickly as the business shifts. Limitations include difficulties with maintaining governance and security controls and the high potential for redundant initiatives that can cause inefficiencies across the organization.

# AUTOMATION NOW & NEXT

## About Automation Anywhere

Automation Anywhere is a global leader in Robotic Process Automation (RPA), automating business processes with software bots performing repetitive, manual tasks, resulting in productivity gains and improved customer experience. Visit [www.automationanywhere.com](http://www.automationanywhere.com).

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