



# Building Business Resiliency

Automating the Path to the Future Enterprise

Research and Insights by





# Executive Summary

**Dealing with uncertainties and disruptions is an integral part of running a business, but the uncertainties brought by the COVID-19 outbreak are unprecedented and require recalibrating of business plans to survive and thrive in the next normal.**

The pandemic is yet another stark reminder of the critical importance of being adequately prepared for the unknown. However, what does "adequately prepared" mean? Can businesses really be sufficiently prepared for all eventualities? No one knows when the next pandemic or any other catastrophe will strike, but an organization that is agile and continually develops strong capabilities stands a significantly higher chance of staying resilient and being better prepared for future contingencies. Technology is at the core of all this, and the COVID-19 pandemic has highlighted the need to accelerate business transformation by embracing technologies such as automation, artificial intelligence (AI), and cloud.

This report, featuring research and analysis by IDC analyst Rishu Sharma, takes a closer look at the crucial role that automation plays in the wake of the COVID-19 pandemic, drawing on the results of an IDC study of organizations across India, together with an Automation Anywhere's survey of over 1,600 organizations across verticals. Among the key findings from the IDC study are:

- Over **52%** of the organizations stated that the demand for automation will increase as a result of the COVID-19 pandemic compared with **26%** that indicated there is no impact.
- The areas that will likely see permanent changes because of the COVID-19 pandemic:
  - Work from home will be added or expanded according to **66%** of Indian enterprises.
  - Adopting digitally-enabled operating models will take into account **more automation**, contactless solutions, and collaboration **64%**.
  - Extend the businesses to include new ecosystems **42%**.

The report offers a way forward for enterprises to ready themselves for tomorrow and be an automation-ready Future Enterprise by focusing on the Automation Barometer, which measures the core dimensions essential for enterprises' automation journey.

Sources: IDC COVID-19 Impact Survey, Wave 3, May 2020

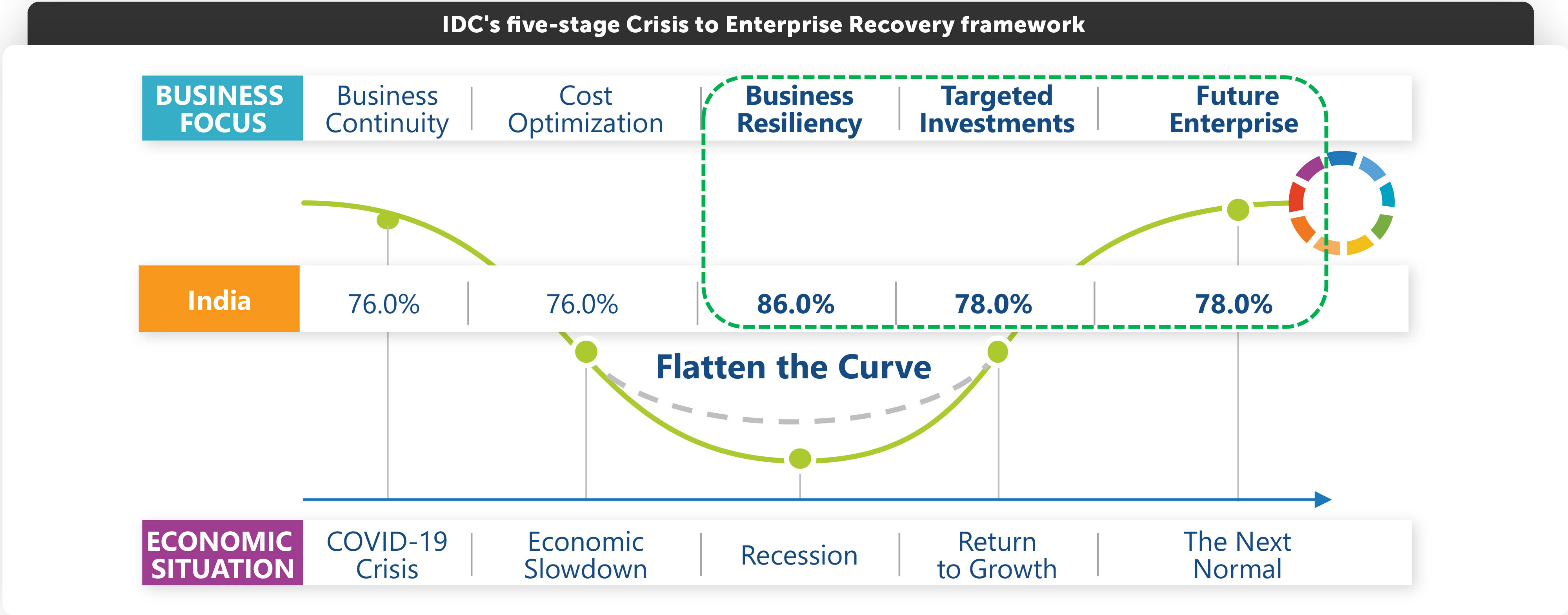




# Navigating to the Next Normal with Automation

The COVID-19 pandemic has underlined the importance of automation in minimizing the impact of the outbreak to flatten the curve and emerge on the other side more resilient and ready to seize opportunities in the next normal.

This analysis was conceptualized in IDC's five-stage Crisis to Enterprise Recovery framework, which begins with businesses concentrating on business continuity at the onset of the pandemic then moves to focusing subsequently on cost optimization, resiliency, and targeted investments and ultimately emerging as a lean, dynamic, and innovation-fueled Future Enterprise.





# Automation Barometer: Measuring the core business objectives

The Automation Barometer identifies four key pillars, that are imperative as businesses move to the next normal. It also identifies the critical role of automation in this journey. As businesses focus on gaining scalability and flexibility, along with managing a digital workforce and trust, what will distinguish triumphant organizations from laggards is the ability to embrace the four key elements as described here.



## Business Resiliency

- Organizations focusing on resiliency let automation spearhead their business objectives.
- These businesses understand that the value of automation is much more than just "reducing the number of people out of processes" to cut costs but instead focus on digital collaboration, digital workplace, capacity, process digitalization management, and organizational agility.



## Efficiency and Scalability

- Scaling automation strategically results in enhanced business value, more so for a dispersed workforce.
- The rise of intelligent automation diminishes the need for human oversight in complex workflows and processes, resulting in improved efficiency and enhanced robustness and flexibility.



## Democratization with Automation

The rise of a digital workforce mandates that there is accessibility for one and all. Businesses can drive the democratization of automation through:

- Human–bot collaboration.
- Digital workers to augment human workers.
- Access to robotic process automation (RPA) software and tools.
- Cross-skilling/cross-functional collaboration of employees on new products.
- Sharing of best practices on automation use.

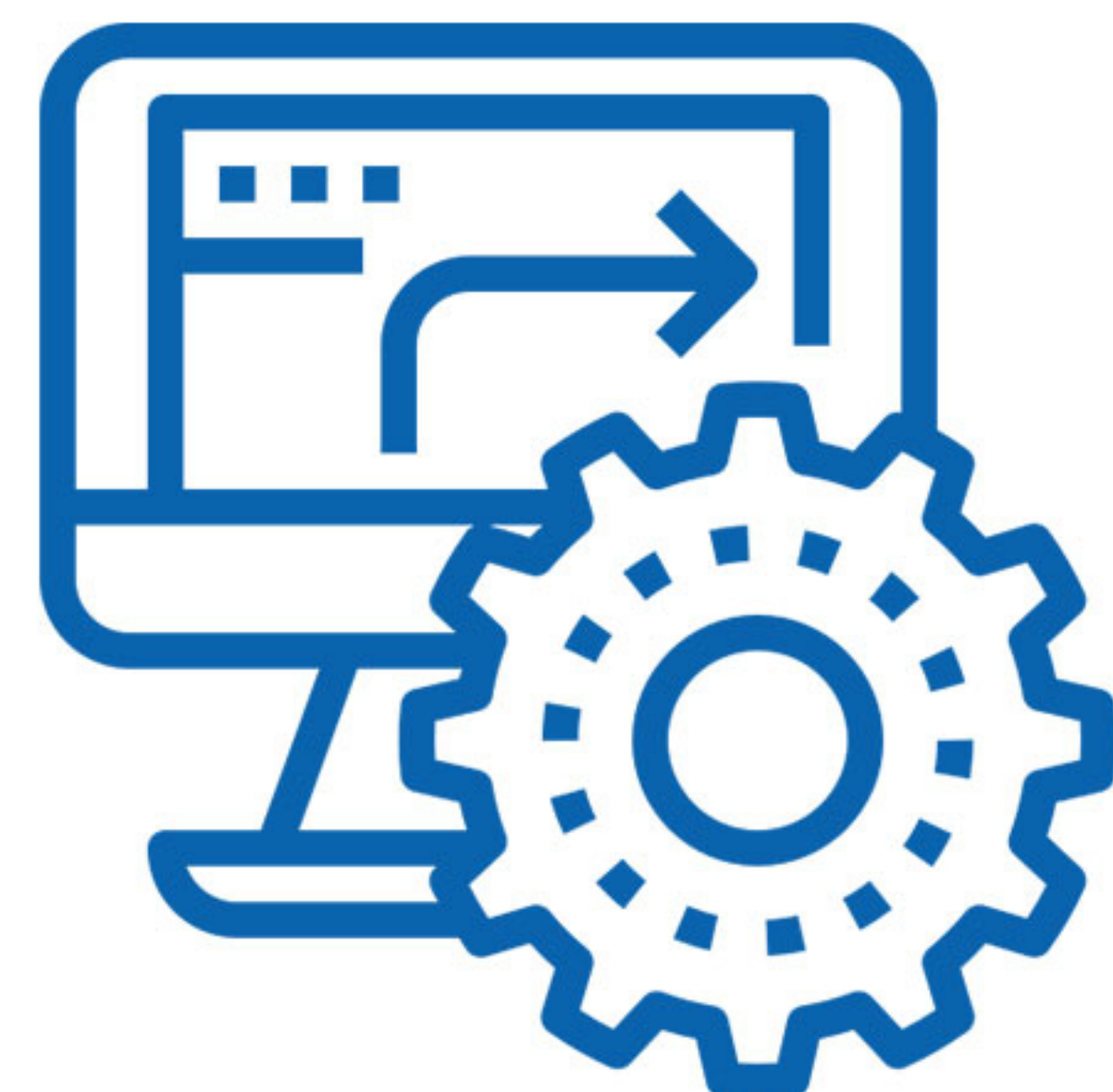


## Trust

- Automation invigorates trust and security as digital priorities continue to drive partner, employee, and customer decisions.
- For effective automation, overall governance and maintenance of the digital workforce are imperative.
- Organizations should consider elements such as governance strategy for bots, risk assessments and stress testing, data security, vulnerability scanning, and so forth.







# Establishing Business Resiliency

Business continuity planning (BCP) and its operationalization is a key requirement to run an uninterrupted service. However, what is more important is to focus on making organizations more resilient and not divert time and attention to just creating various possible BCP scenarios. Technologies such as AI, RPA, and intelligent document processing (IDP) play a key role in boosting the resiliency of business operations.

**India: In order to address the challenges that arise as a result of COVID-19, which of the following has your organization been focusing on?**

Employing a dynamic and reconfigurable work model

48%

Leaning on data to gain insights into business operations, products/ services, experiences, and/or ecosystems

48%

Leaning on agile software development capabilities to modify products, services and/or experiences

38%

Connecting organizations and individuals seamlessly regardless of their location, situation or context

38%

Engendering trust with our customers

34%

As a result of the COVID-19 pandemic, organizations in India are focusing on employing a dynamic work model and using data to gain insights into business operations.

Source: IDC COVID-19 Impact Survey, Wave 3, India, May 2020;

**How do you think automation can help you to prepare or respond in the current lock-down situation?**

No, automation would add more challenges

2%

It will help make the organization more resilient

44%

It would help me manage the BCP situation better

54%

**What technology areas do you plan to invest for building resilience post COVID?**

Analytics/big data

21%

Machine learning

7%

Other emerging technologies

15%

RPA and intelligent automation

57%

## CASE STUDY

A business expansion specialist group started its automation journey in 2019 for its payroll service to global customers. During the COVID-19 pandemic, the company used a combination of RPA data and employee expertise to ensure business continuity with actionable data, resulting in zero interruption in its operations.

**30%**  
increase in  
productivity

**~7,000**  
annual hours saved  
in financial  
reporting services

**280+**  
bots  
implemented

**~3,000**  
Hours saved in the  
first year in payroll  
services

Source: Automation Anywhere, 2019





# Automation Democratization

The COVID-19 pandemic calls for new operating models that allow enterprises to gain agility and flexibility to be better prepared for changes that are needed to meet the requirements of their customers and partners. Businesses are looking for partners that can enable intelligent process automation (IPA) from the back office to the front office for users with varying skill levels.

## Top factors motivating employees at the workplace:

Best-in-class training and development programs

48%

Use of automation technologies for augmenting human workforce

47%

New talent practices for attracting and retaining talent

45%

## IDC's Future of Work survey shows:

About **55%** of the employees in India stated that IPA is the pertinent to improve work productivity and effectiveness.

About **47%** of the employees stated RPA/IPA enables improved efficiency at work.

Source: IDC FoW Employee Survey, 2020, India

## Q. Do you see your organization onboarding more digital workers after the COVID-19 pandemic?

Yes, we need and see higher uptake of digital workers

56%

Maybe, there would be more acceptance of digital workers

38%

No, we do not envision any change

6%

Automation Anywhere: About 73% of the enterprises stated that they have volumes of rule-based, repetitive tasks currently managed by human resources.

## CASE STUDY

Encouraging democratization, a leading bank took three weeks to implement its first bot despite initial resistance from employees at first. Challenged with keeping up with hundreds of files and transaction records that needed to be processed daily, the bank automated finance processes, such as transaction processing and bank records verification, along with processes in the ATM operations department.

65%

Average reduction in processing time

~7,200

Annual hours saved

25

Processes automated

70

Bots in production before 2021

Source: Automation Anywhere, 2020



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# Efficiency and Scalability

Organizations achieve improved efficiencies by standardizing mundane day-to-day tasks with automation, which results in freeing up resources to focus on strategic tasks.

To be able to drive true business value and efficiencies of automation - some of the key parameters for businesses in India are:

## INDIA



Modular architecture for customizable consumption



Range of pricing options and pricing innovation



Automated capabilities (auto-tagging, auto-creation of ML models etc.)



Availability to use in 3rd party software/apps/marketplaces

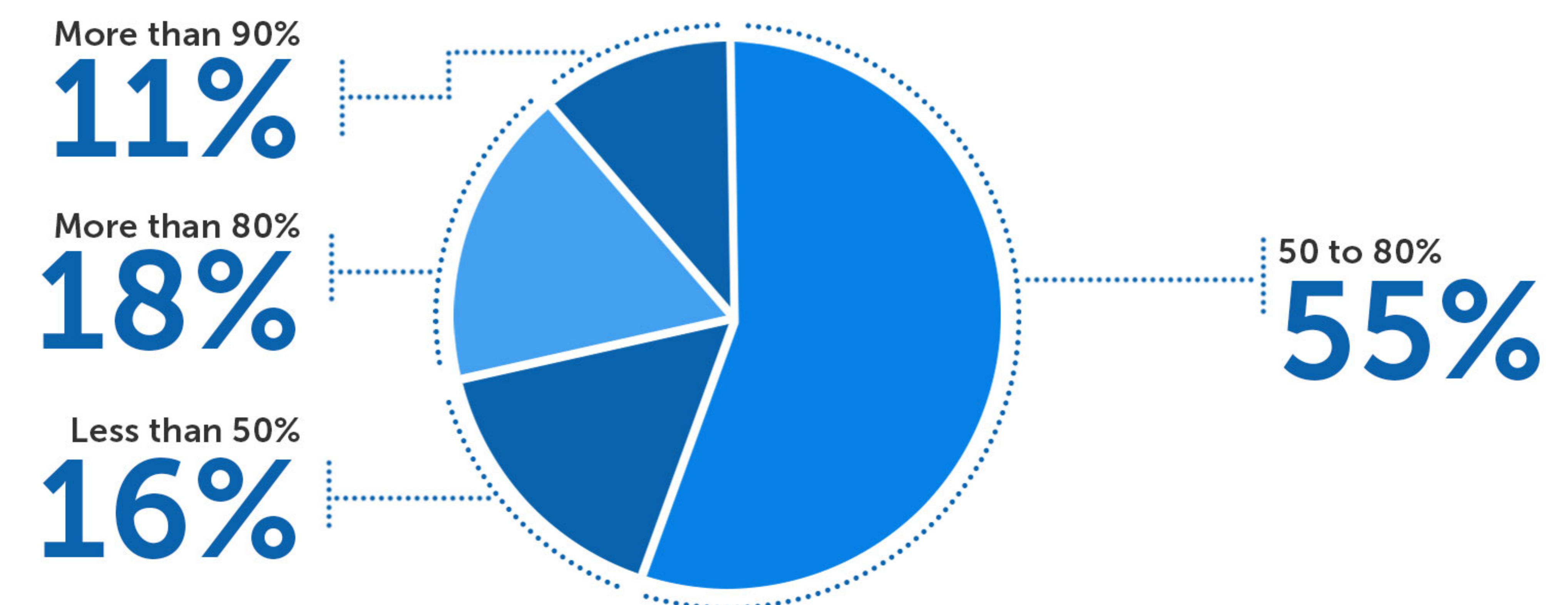


Low code/no code development and Recorders

Sources: IDC: Enterprise Business and IT sourcing survey, 2019

- According to Automation Anywhere, 40% of the organizations stated that they plan to scale up their RPA plan in the coming year, and 45% stated improved productivity and scalability as key factors in their automation solution.
- The scope and scale of automation will scale in the coming time. About 71% of the organizations are looking to shift to digital models after the COVID-19 pandemic.

What percentage of work will move to digital post COVID-19 pandemic?



## CASE STUDY

A global manufacturer adopted automation to improve process effectiveness and efficiency by automating processes across finance, IT, and HR functions, including data analysis, time card management, performance metrics, and package repair orders consolidation.

**US\$75M**  
ROI from process automation

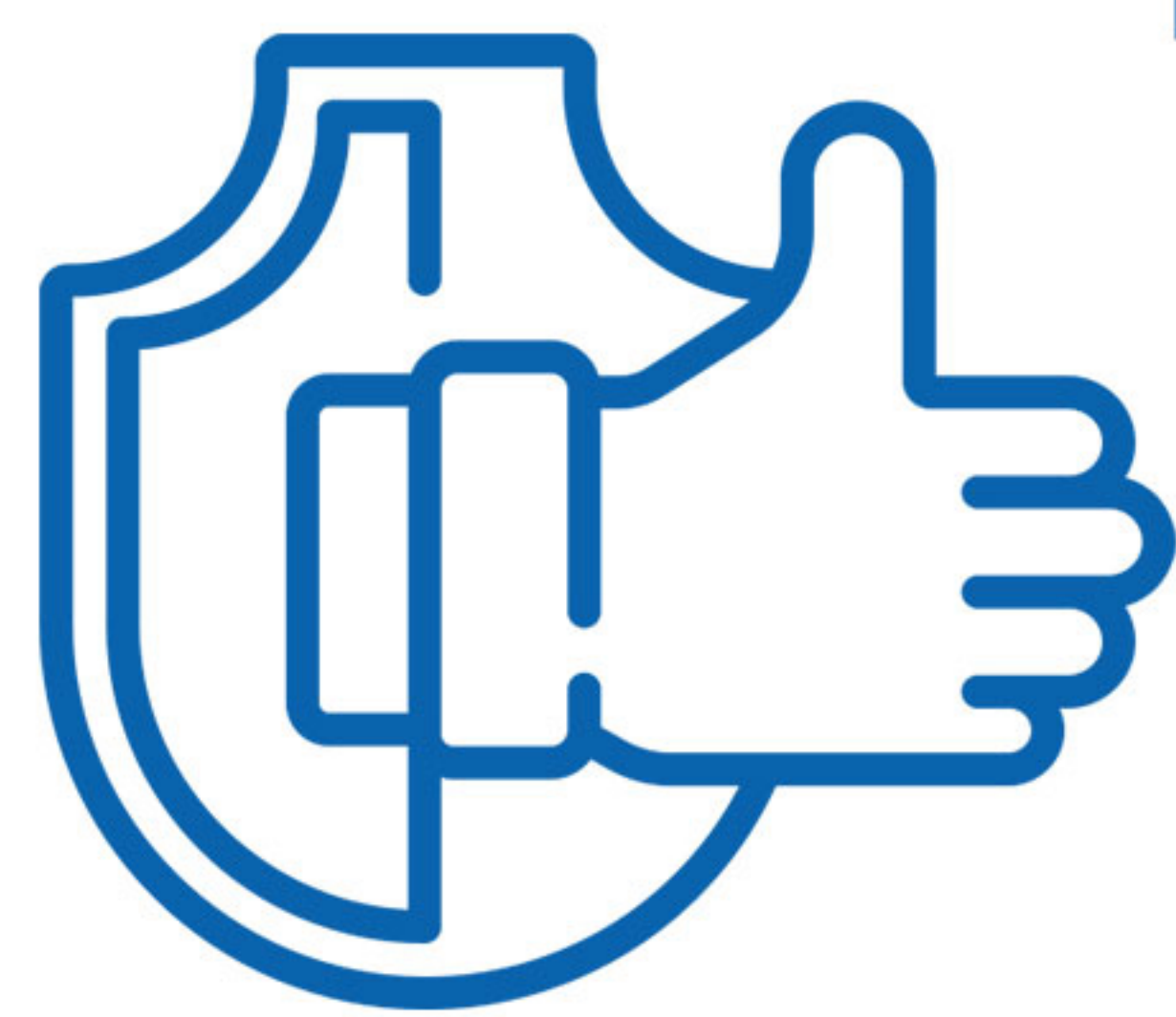
**25–50%**  
Reduction in operations cost

**500+**  
Processes automated

**600** Bots plus  
**2,000+** bots in production

Source: Automation Anywhere, 2019





# Trust and Security

Indian organizations cited trustworthiness as the number 1 priority of business partners for digital transformation. CXOs are looking to automation to enable more robust management, control, security and audit, and overall governance of processes. Contrary to popular belief, robots can improve the accuracy, consistency, and security of transactions and processes.

## CHECK LIST



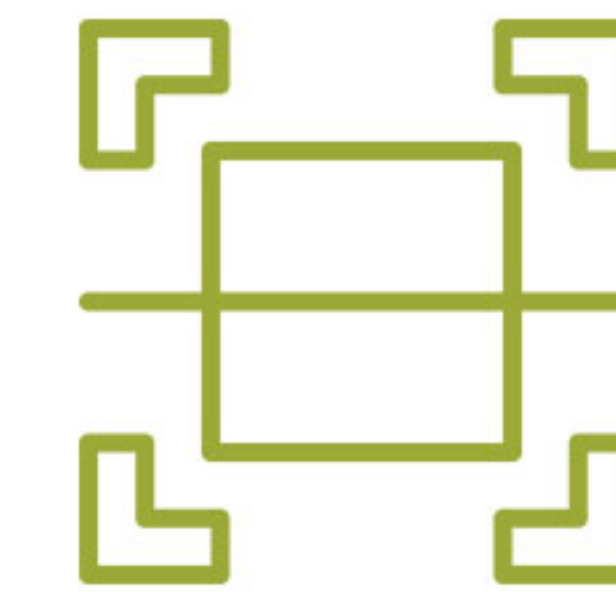
Governance strategy  
for bots



Risk assessments  
and stress testing



Data security



Vulnerability  
scanning

Source: IDC Digital Trust and Cybersecurity Economics Survey, 2020



## CASE STUDY

A technology-enabled payments solutions provider wanting to enhance the efficiency and consistency of business processes across multiple global locations leveraged automation in its processes across finance and IT operations, including business operations, administrative processes, and card management. Effective security frameworks have made data integrity and user privacy critical components of success.

**72,000+**  
Chargeback requests  
processed annually

**70%**  
Reduction in manual  
processing time

**50**  
Business processes  
automated






























**100**  
bots in production

Source: Automation Anywhere, 2020



# Organizations Across Verticals Are Adopting Automation in Transformative Ways

Organizations across diverse industries are benefiting from the successful implementation of automation. These benefits are brought to light in the use cases from five key verticals below. The benefits are assessed in terms of the four pillars of efficiency and scalability, trust and security , business resiliency and automation democratization. The icon in blue indicate the pillars that are more applicable for a particular industry.

 Healthcare	 Financial Services	 Government	 Technology	 Telecom
<p>A leading healthcare services provider introduced automation as a scalable solution to handle transactional work and manage accounts receivable processes, including creating and sending bills to customers, adjusting charges, receiving payments, and collecting debts.</p>	<p>A global bank leveraged automation in complex processes across three global groups: Institutional Clients Group, Global Consumer Banking, and Enterprise Operations and Technology. Use cases included customer account setup, foreign exchange reconciliation, maintenance and closure, data reconciliation/ validation, and claim processing.</p>	<p>A government-owned postal department automated about 25 processes, including maintaining financial journals, managing credit uploads, facilitating automatic agency setup and pricing, as well as material maintenance, which involves creating and changing the details of all items sold at different postal outlets.</p>	<p>An India-based technical arm of an automotive manufacturing company introduced automation to reduce repetitive processes and motivate people to take up higher-value work and improving customer satisfaction. Digital workers assisted employees in completing tedious tasks, thus boosting the morale of the employees.</p>	<p>A leading content distribution platform provider in India considered automation over outsourcing its manual processes. RPA was adopted in complex processes for treasury and tax, management information system reporting, as well as mid-office activities of the treasury.</p>
<ul style="list-style-type: none"><li>• 25,000+ hours saved annually</li><li>• 12 bots in production</li><li>• 20% reduction in operational costs</li></ul>	<ul style="list-style-type: none"><li>• 10 million+ transactions automated annually</li><li>• 6,000+ hours automated</li><li>• 400+ processes automated</li></ul>	<ul style="list-style-type: none"><li>• 15% cost reduction within accounting services</li><li>• 18,000+ hours automated</li><li>• 120 bots deployed</li></ul>	<ul style="list-style-type: none"><li>• 80 bots in production</li><li>• 100+ bots in pipeline</li><li>• 80+ processes automated</li></ul>	<ul style="list-style-type: none"><li>• 98% improvement in transaction accuracy</li><li>• 10,000+ hours saved annually</li><li>• 17+ processes automated</li></ul>
<div></div>	<div>  Efficiency and scalability</div>	<div>  Business resiliency Automation democratization</div>	<div>  Trust</div>	<div></div>



# What to Expect in Your Automation Journey

As automation becomes mainstream in processes and tasks, IDC believes that businesses should keep in mind the challenges associated with strategy, people, technology, and compliance. Businesses should be asking the right questions to minimize risks.

## Top Challenges in RPA/IA Adoption in the Organization

1. Difficulty in developing a business case for automation
2. Lack of necessary skills to execute automation projects
3. Identification of the right automation software
4. Cultural resistance to automation
5. Choosing the best automation implementation services partner
6. Lack of clarity on processes to target for automation
7. Meeting regulatory/compliance requirements

## Questions for Businesses

- Why automation? What key business challenges will automation help overcome?
- Although automation will bring about human-machine collaboration, how will the organization manage the digital workforce?
- How can businesses reskill their workforce for efficient collaboration with the bots?
- What should be the right platform for automation? Does the business build or buy?
- Are employees ready to work closely with the bots? How can businesses break down resistance while ensuring harmony and efficiency?
- What are the key parameters for identifying an ideal partner of choice on the automation journey?
- Which processes are ripe for automation? How do we measure the success of bots? What will be the data governance strategy for bots?



# What Does the Future Hold?

**Intelligent process automation:** By **2024, 50%** of enterprises in India will embed intelligent automation into technology and process development, using AI-based software to discover operational and experiential insights to guide innovation.



## The Road to the Enterprise of Tomorrow



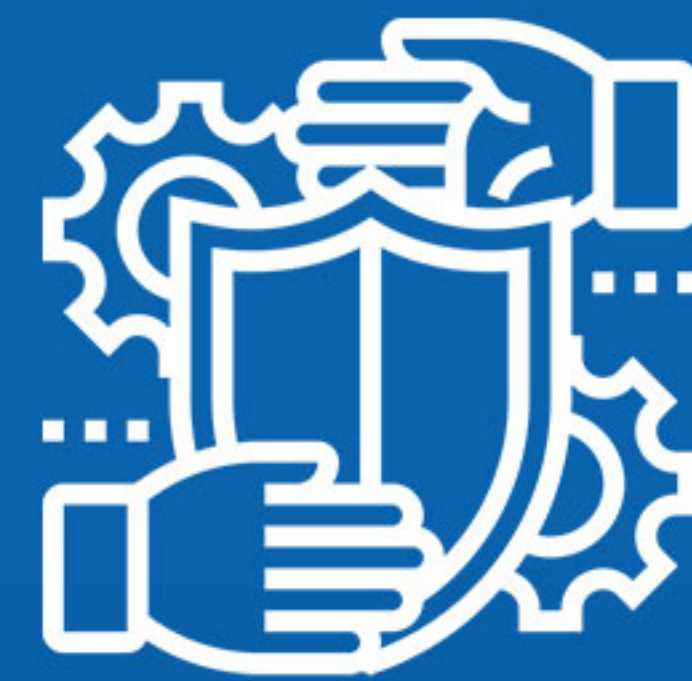
### Big Bang Data

By 2024, an explosion of data, driven by the demand for AI-enabled automation, Internet of Things (IoT), and smart devices will exceed 4ZB. About 20% of businesses will harness it into real-time outcomes.



### Worker Augmentation

By 2024, 50% of enterprises in India will invest in employee retraining and development, including third-party services, to address new skill needs and ways of working resulting from AI adoption.



### Trust

By 2024, the top 100 organizations in India will have formal programs to monitor their "digital trustworthiness" as digital trust becomes a critical corporate asset.



### Agility and Innovation

By 2023, half of the A1000 companies in Asia/Pacific (excluding Japan) (APEJ) will use AI/machine learning (ML), chatbots, and digital assistants to measure key behavioral indicators (KBIs) to drive agility, collaboration, innovation, and business outcomes.



### Digital Coworker

By 2021, the contributions of digital coworkers in APEJ will increase by 30% as more tasks are automated and augmented by technology, including AI, robotics, augmented reality/virtual reality (AR/VR), and IPA.

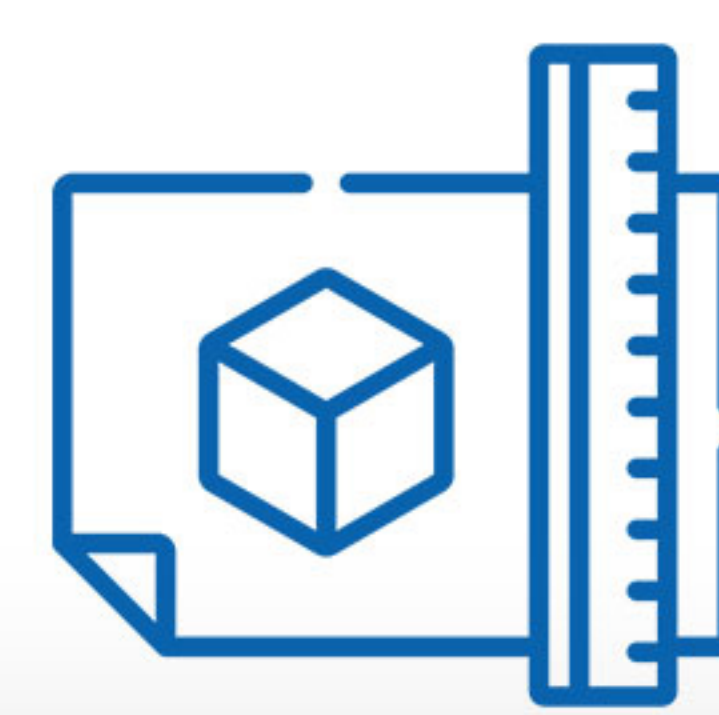


# Becoming Future Enterprise–Ready, Automation-Ready



## Future Enterprise: All About Automation, Innovation, and Trust

The enterprise of tomorrow will be digitally determined organizations that imbibe empathy, intelligence, resiliency, and empowerment at scale. Businesses that incorporate innovation, automation, and trust will lead the pack through the competitive advantage gained by a core focus on customer centricity.



## Automation Strategy, Plan, Road Map: Automation First

Developing a clearly articulated road map on the digital workforce aligned with the business goals is imperative. Enterprisewide automation is driven from the top and upholds automation democratization and intelligent capabilities.



## The Age of Digital Workers in Your Future of Work

The future is all set to change with the alignment of jobs and an ever-changing workforce. Most organizations will look to remote working as a permanent feature. The rise of the digital worker is inevitable for improving efficiency and gaining agility.



## Business Value Beyond ROI

Beyond costs, the benefits are manifold. Think about boosting employee morale, superior customer engagement, improved efficiencies, robust accuracy, and additional new capabilities. Developing key performance indicators (KPIs) for measuring bots and RPA systems performance can help define true business value.



## Identifying the Right Partner

Ensure that the business goals are in line with the vendor selection criteria. The right partner will help in not only deploying RPA but also providing training and technical support. Evaluate vendors' strengths and weaknesses to determine how they can help in solving business problems.

"All our new initiatives are being tested natively on cloud. Our business plans will now include automation and a mix of human–machine interface."  
— CIO, conglomerate, India

"Automating mundane tasks, and IT operations and finance that are driven by people and then upskilling those people, reskilling strategies, using AI/ML technologies for decision making are among the top priorities for our business."  
— Senior executive, IT-enabled services, India



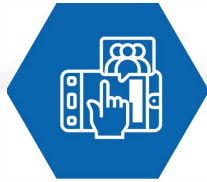
# About Automation Anywhere

How Automation Anywhere supports organizations across the Automation Barometer pillars



## Business Resiliency

Business resiliency offered by Automation Anywhere's cloud services (software-as-a-service [SaaS] model) form the backbone for the delivery of critical IT capabilities. We see many enterprises adopting a cloud-first approach for consuming process automation software. Automation Anywhere Enterprise A2019's web-based, cloud-native RPA platform enables users to access the platform from any browser, on any OS, and on any device for instant-on access.



## Automation Democratization

Enterprise A2019 enables IPA from the back office to the front office for users with varied skill levels. The Digital Workforce platform offers a dedicated user experience (UX) for three key personas: business users, IT users, and developers. The low-code, no-code interface enables end users to make their own bots with very easy-to-use interface. It truly democratizes the experience by empowering end users to automate their process using very intuitive technology.



## Efficiency and Scalability

The Automation Anywhere Robotic Interface (AARI) and Discovery Bot help managers easily manage workstreams across a pool of employees and software bots, thereby driving higher levels of employee productivity and improved customer experience (CX). HBC enables humans and bots to work together on the same process and amplifies the ability to manage work more efficiently. It also creates more capacity for humans to respond to more business-critical needs.



## Trust

Enterprise A2019 offers a range of data security and privacy features, including support for Advanced Encryption Standard (AES) 256-bit encryption for data at rest and transport layer security (TLS) 1.2-bit encryption for data in motion. Customers have control over personally identifiable information, and the platform offers role-based access control (RBAC) for user-specific access privileges and controls over data access. Enterprise A2019 ensures adherence to strict General Data Protection Regulation (GDPR) policies. The platform is security operations center level-2 type-1 compliant and Veracode Verified Continuous-certified.