

**4th Edition**

Released December 2023

AUTOMATION  
**NOW**  
**NEXT**  
**2023 for India**

State of Intelligent Automation Report



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# About the report

The Automation Now & Next: State of Intelligent Automation Report is the only survey of C-level executives, business leaders, automation leaders, and practitioners that reflects the global state of automation today. It provides visibility into current thinking and ongoing trends unavailable elsewhere as it focuses on Intelligent Automation—the combination of automation plus artificial intelligence/machine learning (AI/ML), including emerging generative AI technologies—and how enterprises are deploying, using, and planning automation efforts today and into the future. Now in its fourth edition, Automation Now & Next also shows how those efforts have shifted over time.

The report is also unmatched in its breadth, providing a unique and comprehensive look at the actions, experiences, and projections of more than 1,000 decision-makers from across industries and regions.

This version of the report is specifically tailored to highlight trends and insights from respondents representing Indian enterprises. India-specific results are noted, however all other data in this report reflects global responses.

## In the Automation Now & Next 2023 report, you'll discover:



The economic, operational, and technological forces defining today's automation and AI market landscape, and how we expect those forces to influence tomorrow's Intelligent Automation efforts and investments.



How organizations have paired Intelligent Automation and generative AI to increase productivity, drive innovation, and find new growth opportunities.

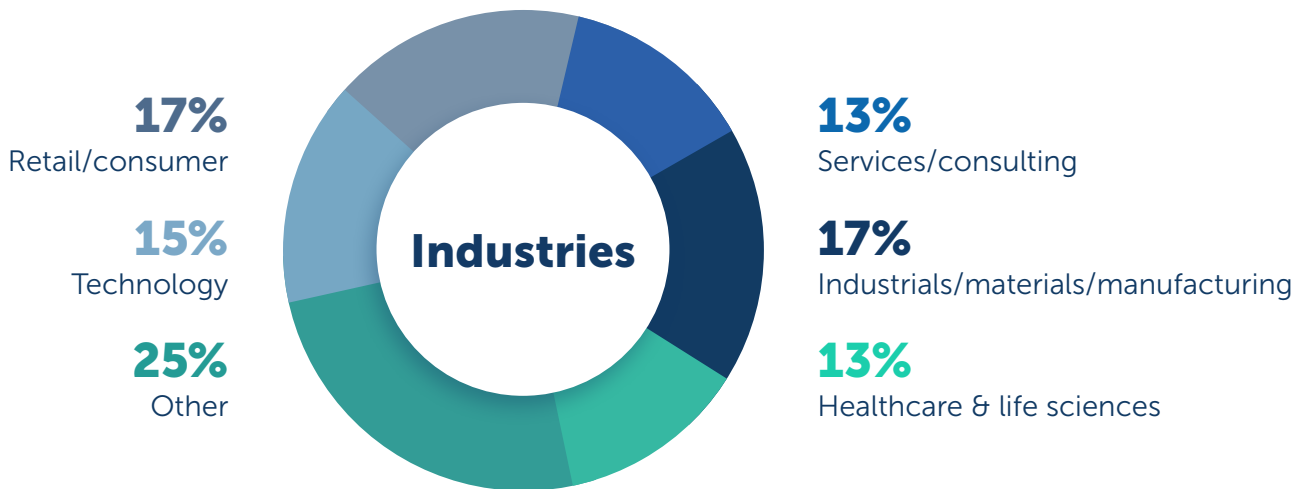


How organizations are empowering business teams via citizen development to scale their automation programs in 2023 and beyond.

# Methodology

Automation Now & Next presents key findings from global research performed by Foundry, an independent research and analysis firm. It surveyed automation professionals from North America, South America, Europe, and Asia whose organizations are actively evaluating and/or deploying Intelligent Automation. Respondents represented organizations of all sizes, with nearly even representation across 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. Nearly 20% of respondents held C-level titles, and over 50% were VP-level and above.

## Respondents by industry representing Indian enterprises



## NOW

June 2022 to May 2023



## NEXT

June 2023 and beyond

The survey behind Automation Now & Next 2023 was conducted in May and June 2023. Respondents were instructed to consider “now” as the preceding 12-month period of June 2022 to May 2023 and “next” as June 2023 and beyond.

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

# Executive summary

Over the past year, AI, particularly generative AI, has become top-of-mind for executives and boardrooms due to its massive potential to change how businesses operate. Organizations are therefore increasing investments to supercharge business transformation by combining AI with the proven ability of automation to increase productivity. Those that can effectively scale automation + AI efforts—mainly by empowering business users to deploy business goal-focused automations—will realize the most benefit. However, it's critical to incorporate purpose-built AI and generative AI technologies to overcome security, privacy, and other perceived risks.



## Key takeaways for Indian enterprises



### Investments in AI and ML continue

Indian organizations are poised to gain massive benefits by investing in automation and generative AI, enabling them to achieve their primary goal of exponential productivity growth.

**63%** plan investments in the next 12 months.



### Unprecedented growth in Intelligent Automation

Intelligent Automation's rising priority in India is evident as the C-suite becomes more engaged in purchasing decisions and organizations allocate larger budgets year over year to capitalize on its transformative potential.

**85%** growth in investments in past 12 months.



### Success requires scale

For digital transformation success, Indian enterprises must foster widespread adoption throughout the organization. This requires empowering business users to easily and accurately build process automations.

**68%** seek to drive efficiency, scalability, and transparency.



Productivity is foundational to economic growth and the world's next level of evolution. Intelligent Automation, including AI and generative AI, is proving crucial to solving the massive productivity crisis unfolding in front of us. The 2023 Automation Now & Next report echoes our long-held belief that Intelligent Automation is the only true solution to the current workforce challenges facing organizations in India and around the globe.

**Ankur Kothari**

Co-Founder, Chief Operating Officer  
Automation Anywhere



# Introduction

AI has taken over business mindshare and technology investments. This is the **Age of AI**, and the technology is helping to improve financial forecasts, identify potential business risks, and more. Now, generative AI has become the latest technology to emerge and is already improving customer service chatbots, providing assistance to software developers, and generating customer-ready content. But, concerns around data privacy and security, among others, are pushing organizations to deploy specialized and industry-specific generative AI models.

Why are organizations so eager to invest in AI and generative AI solutions? The pressing need to increase productivity across the enterprise. Since 2016, India's **Labour Productivity Growth** has slowed significantly. A recent study by The Harris Poll found that 72% of business leaders from Fortune 500 companies plan to incorporate generative AI within 3 years specifically to address productivity gaps. A specific focus on productivity growth can enable India to add \$2.5 trillion of economic value and the creation of at least 90 million nonfarm jobs by 2030, according to **McKinsey**.

With ever-increasing growth and profitability levels expected from businesses, this massive productivity gap has become a top concern for executives and boardrooms around the globe. Many forward-looking businesses are combining process automation, AI, and generative AI to transform operations, streamline how work happens, improve customer service, and enable improved performance to power steep growth trajectories.

But to impact productivity gaps quickly, effectively, and securely, organizations must scale automation efforts by enabling business users to build automations that support organizational goals. This requires leaders to accelerate their identification and targeting of processes ripe for productivity improvements, and then leverage customized and industry-specific AI and generative AI technologies to ensure data privacy and security.

**These three topics—AI, productivity improvements, and scalability—are underscored by the following results of the Automation Now & Next 2023 report.**





As businesses continue to focus on driving efficiencies, leveraging Intelligent Automation is no longer an option, but a necessity to improve financial bottom-lines. Intelligent Automation technologies are designed to improve efficiency, scale operations, and enhance business and employee productivity. Productivity is paramount in today's dynamic business landscape, and adoption of Intelligent Automation, especially with generative AI, is crucial for success. Measuring ROI confirms its impact, substantially increasing customer satisfaction and employee engagement.

**Suresh Ramanan**

Managing Principal and Intelligent Automation Practice Lead  
ZS Associates



# Artificial intelligence

Custom, industry-specific AI technologies enable incredible opportunities while reducing risk.

## NOW

- 17%** increase in year-over-year growth in average Intelligent Automation investment.
- 88%** of respondents say AI is key to successful automation.
- 70%** of respondents say security concerns will stop them from using AI.



## NEXT

We expect AI investments to continue their acceleration as organizations adopt purpose-built AI and generative AI and overcome any internal resistance. With the majority of respondents already investing in AI/ML, we expect Intelligent Automation investments to accelerate, too.



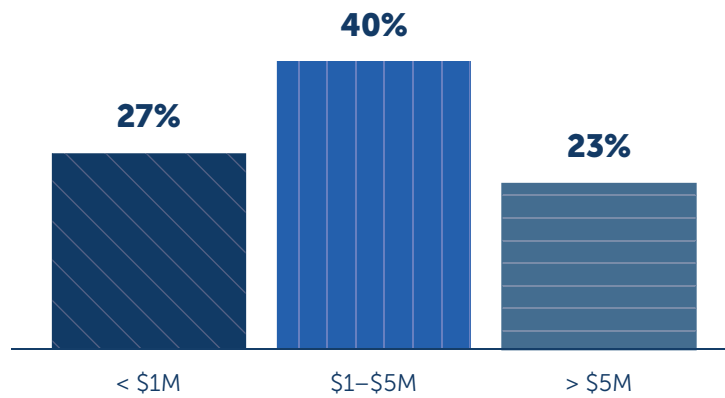
## Key trends

- Intelligent Automation investments continue to increase.
- Security and privacy issues are a top roadblock.
- Purpose-built AI solutions can alleviate challenges.

AI continues to be a transformational force and a topic of mainstream conversation. From 2017 to 2022, the [McKinsey Global Survey on AI](#) found that AI adoption more than doubled. Now, generative AI is accelerating these workforce transformations, with [McKinsey estimating](#) that half of today's repetitive work tasks could be automated within the next 20 years.

The mainstream hype around generative AI is also leading executives to increase AI investments in general, according to [research by Gartner](#). Organizations now see AI, and generative AI specifically, as essential for process automation success, and investments in Intelligent Automation (automation + AI) continue to increase. Last year, 78% of respondents said they would somewhat or significantly increase automation budgets in the coming 12 months. That proved to be true, with the average respondent now investing \$5.6 million in 2023 in Intelligent Automation for a 17% increase over 2022 spending. In 2022, the average automation ROI was 6.3x, up from 2.5x in 2021, indicating that organizations are confident in the value of automations.

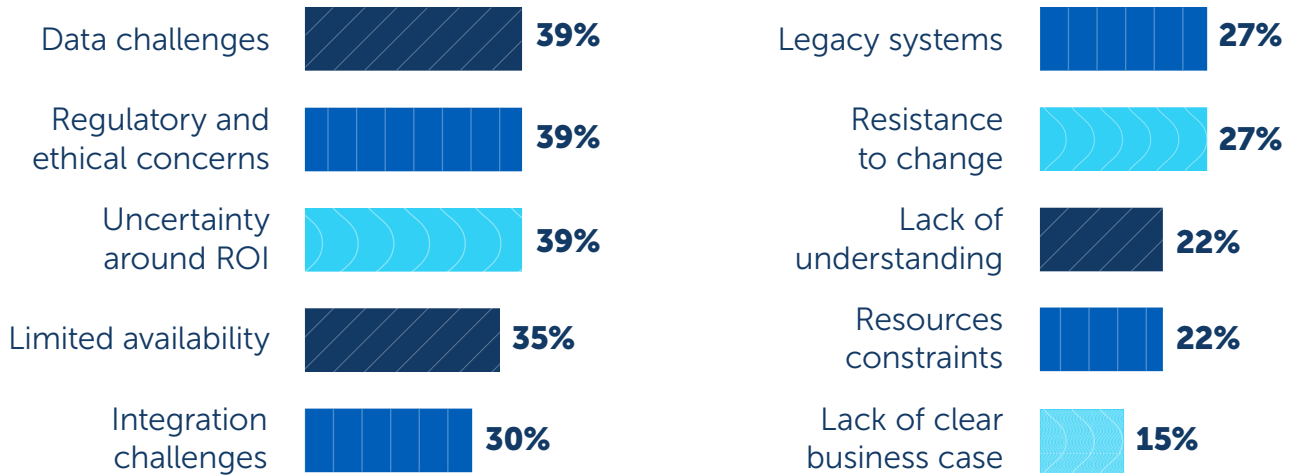
### Level of Intelligent Automation investments according to respondents representing Indian enterprises



# \$5.6M

is the average investment in Intelligent Automation.

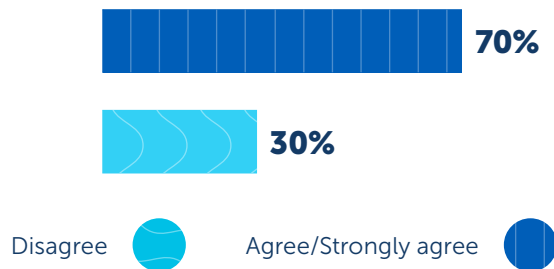
## Barriers to adopting AI technology experienced by respondents



## Barriers and concerns

With generative AI and virtual assistants as the key areas of focus for automation leaders, concerns and friction begin to emerge. Data challenges and regulatory/ethical concerns are top barriers to adopting AI technologies, say 39% of respondents, and 70% say security and privacy concerns will stop them from using AI. The mainstream coverage of the risks of AI may be contributing to these concerns, especially with sensationalized headlines pointing to a “Risk of Extinction.” These concerns increase hesitation for AI adoption and Intelligent Automation deployments, yet investments continue to grow. As organizations continue to deploy AI and generative AI, many are alleviating security and privacy questions by investing in specialized and industry-specific automation technologies, as detailed later in this report.

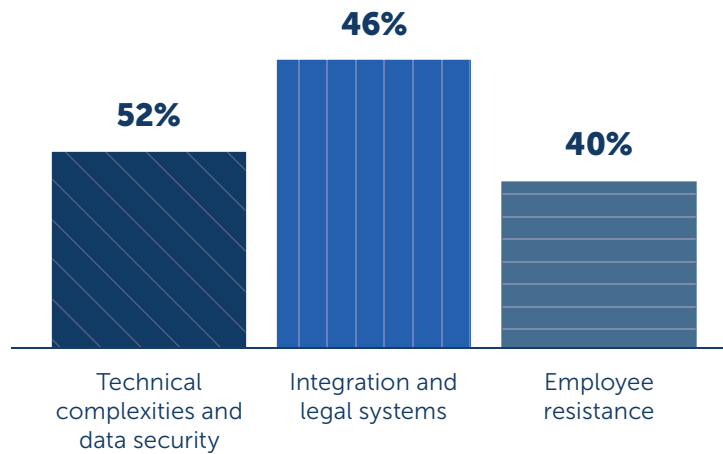
## Percentage of respondents stating security and privacy concerns will stop them from using AI



## Barriers to adopting AI technology experienced by Indian enterprises

AI technologies enable advanced data analysis, decision-making, and adaptive learning, which enhance the efficiency and effectiveness of automation processes. AI's ability to handle complex and dynamic tasks efficiently makes it a crucial component in achieving successful and scalable automation solutions for businesses. But even as enterprises across India see the immense value of AI, many face challenges in deploying these game-changing technologies. However, determined and focused enterprises are finding ways around those barriers.

### Respondents from Indian enterprises see the following barriers to adopting and using AI



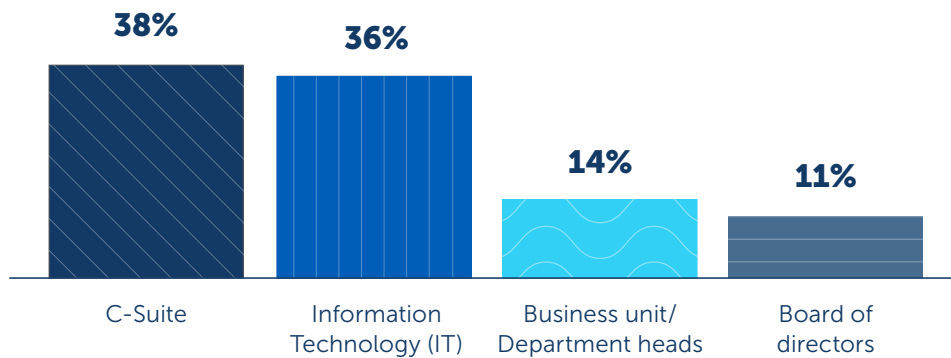
### But many see these barriers beginning to crumble

More than half of Indian enterprises believe security and privacy concerns will stop them from using AI technologies. The potential risks of AI such as data breaches, unauthorized access, or misuse of sensitive information are seen as significant barriers to adoption. However, 33% of Indian enterprises are confident in their ability to implement robust security measures and privacy protocols to mitigate these risks, enabling them to confidently embrace AI and Intelligent Automation technologies.

## Elevating Intelligent Automation

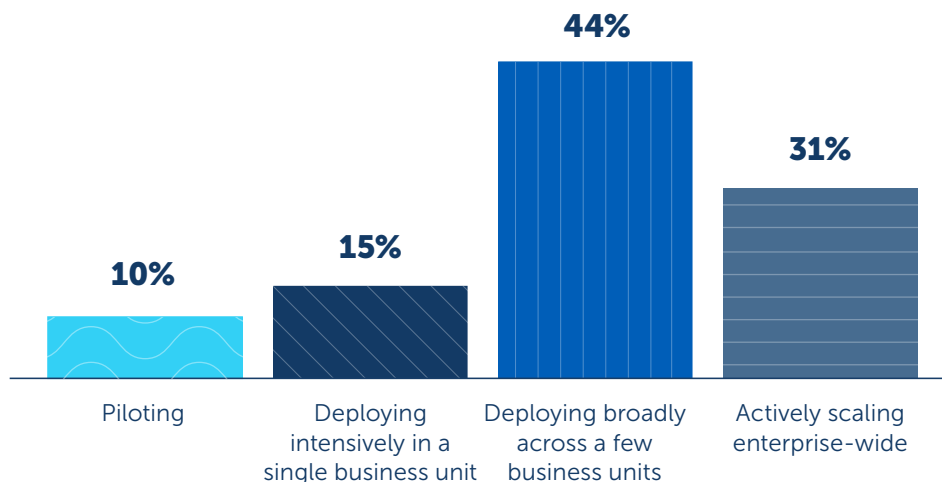
Investments in Intelligent Automation are increasing because organizations are finding ways to mitigate AI resistance as business leaders take a more active role. In fact, 38% of respondents say the C-suite is involved in the final purchasing decision for automation—that's higher than IT—while another 11% say automation purchasing decisions are made by the board of directors. This change underscores the elevated prioritization and need for enterprise-wide scale: as opposed to the proliferation of SaaS point solutions that functional leaders buy specifically for their team, the C-suite and board are involved to ensure the organization procures a single, integrated automation platform that can scale as evidenced later in the report.

### Department or role with final purchasing decision for automation, according to respondents



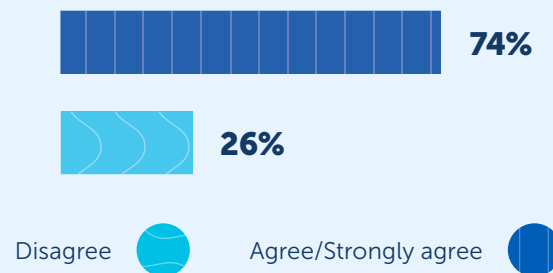
Last year, 84% of respondents said their automation programs were actively scaling or deploying broadly, and 52% said that Intelligent Automation was a key focus for the next 12 months. That has proven true this year as the focus on RPA-based automation has given way to Intelligent Automation. Today, 75% of respondents say they are deploying Intelligent Automation broadly (44%) or actively scaling enterprise-wide (31%). This is likely due to organizations wanting to quickly replicate successes realized in smaller or departmental Intelligent Automation deployments.

### Status of Intelligent Automation deployments at respondents' organizations



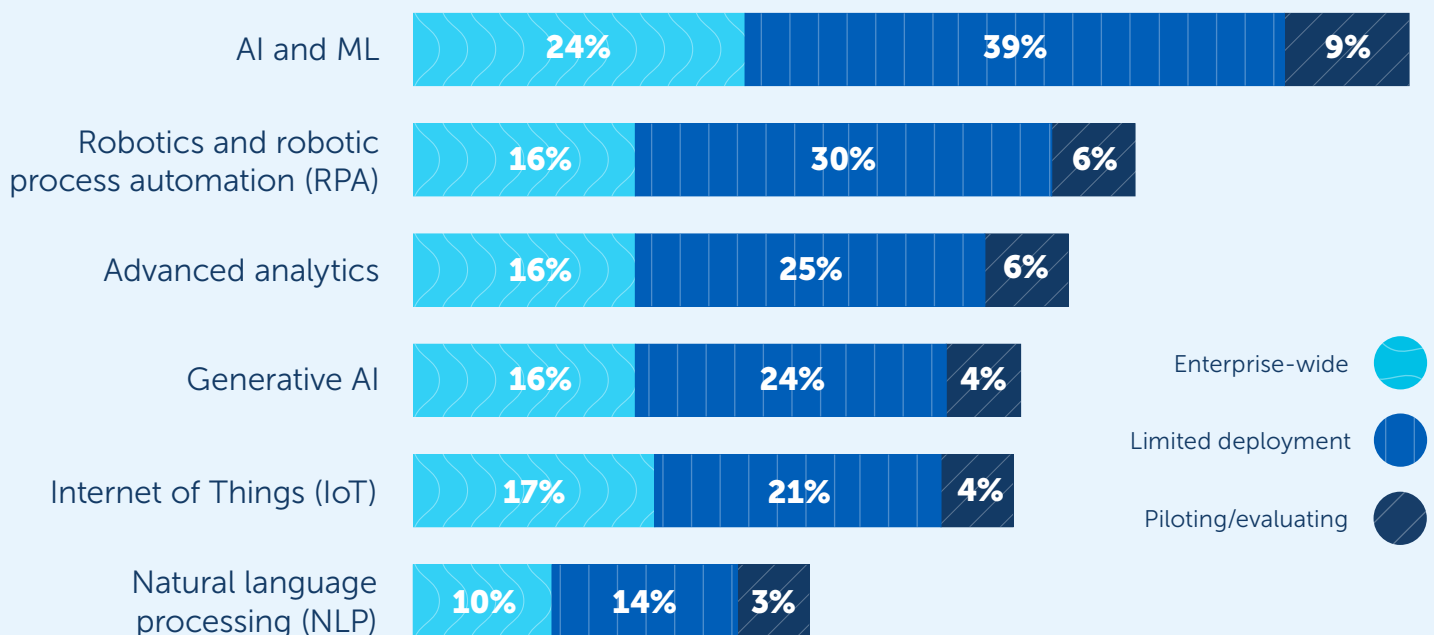
The explosion of interest, speed of investment in—and, deployment of—generative AI is unprecedented. Spend on generative AI is expected to grow at an incredible 42% annual growth rate over the next decade, from \$40 billion in 2022 to \$1.3 trillion in 2032, according to a new report by Bloomberg Intelligence. We expect this to be true as 88% of respondents say AI is key to successful business process automation and respondents are backing up this assertion with real investments.

### Percentage of respondents from Indian enterprises stating AI is key to successful business process automation



Nearly two-thirds of respondents (63%) have already deployed AI/ML, and 40% have already deployed generative AI—nearly as much as the 46% that have already deployed RPA. In India, 33% of respondents are planning to adopt generative AI to drive growth. We expect adoption of generative AI and Intelligent Automation to happen faster than that of RPA, therefore automation leaders must make AI a core capability across an automation program.

### Stage of respondents' automation deployment by technology

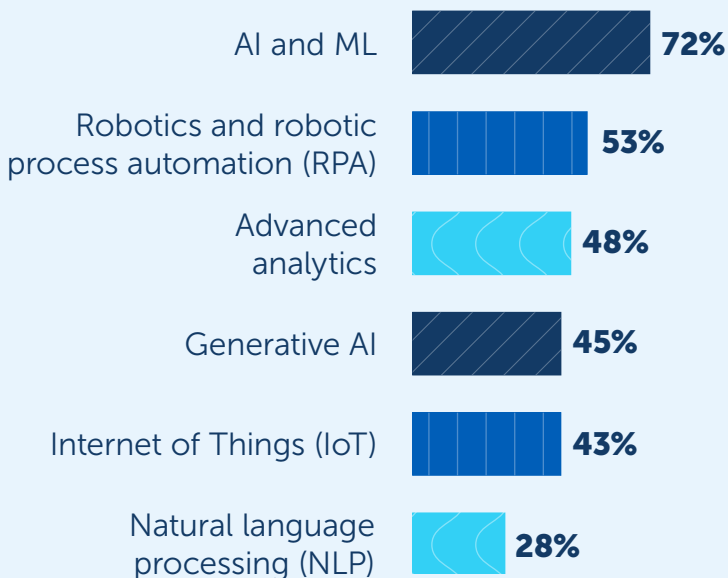


## Investment priorities

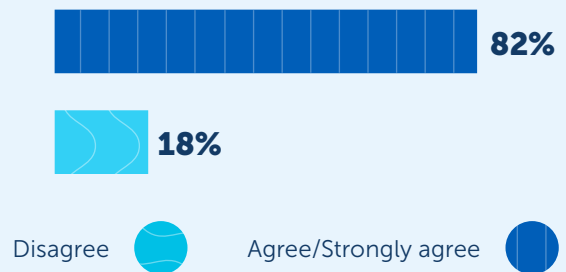
As mentioned, security, governance, and ROI uncertainty create potential blockers to AI adoption, yet AI investments continue to grow. We anticipate investments in AI will accelerate as these questions get answered. We're already seeing it as organizations are looking to purpose-built AI and generative AI technologies to overcome data, security, privacy, and regulatory/ethical concerns.

Last year, 72% of respondents said they had simply prioritized Intelligent Automations. This year, organizations are moving forward with vigor as 72% of respondents globally and 63% from Indian enterprises say their organizations are actively investing in AI/ML automation technologies in the next 12 months—far eclipsing the 53% of respondents who say their organizations are investing in RPA over the next 12 months.

### Percentage of respondents investing in specific Intelligent Automation technologies



### Percentage of respondents stating a need for specialized or industry-specific AI apps



Just as we expect investments in AI to continue accelerating, we expect investments in Intelligent Automation to grow quickly as well. But, to alleviate concerns about AI, leaders must ensure automation platforms remain open, agnostic, and provide the flexibility to choose from any number of trusted, specialized, and/or industry-specific generative AI providers and models that work best for the situation.

Most respondents (82%) are looking for specialized and industry-specific automation technologies, such as custom large language models for generative AI. We expect these specialized AI apps to require increased input from the business users and SMEs who are deeply familiar with business goals and strategies at various levels. We also expect organizations to retain this SME "human-in-the-loop" to enable governance and reduce risks by involving those most familiar with the business processes.



We see significant scaling up of investments in automation and AI/ML at our customers, with generative AI driving the identification of new use cases and improving business outcomes. Organizations are increasingly moving up the value chain from automating only rule-based, large-volume transactions to providing real-time business insights supporting strategic goals. This is expected to unlock significantly faster decision-making capabilities and enhanced customer experiences, driving growth and profitability.

**Satyen Makhija**

Partner, Digital – Intelligent Automation and Emerging Technology  
KPMG in India



# Productivity

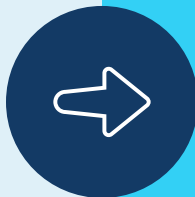
Only with automation can organizations overcome expected massive productivity gaps.

## NOW

**78%** of respondents say productivity gains are desired impact of automation, surpassing all other KPIs.

**68%** of respondents see virtual assistants as AI use case, far greater than the other use cases listed.

**87%** of respondents say next level growth requires end-to-end process transformation.



## NEXT

With 72% of respondents investing in AI/ML over the next 12 months, we expect to see more AI-driven innovations and automation use cases, especially as generative AI deployments increase. To coordinate, govern, and scale these efforts, we expect organizations will standardize on a unified automation platform.



## Key trends

- Due to the growing productivity crisis, improved productivity is the primary driver of automation efforts.
- Generative AI is a key area of investment to tackle productivity challenges.
- Automation powered by generative AI will accelerate enterprise-wide productivity gains.

The desire to increase productivity is the primary driver of most automation initiatives, with 76% of respondents choosing productivity as the top KPI used to measure the impact of Intelligent Automation investments. In 2022, respondents cited cost reductions, improved employee experiences, and business continuity as the top three goals driving automation projects. ROI remains a lagging KPI, selected by 68% of respondents, as it was last year when 53% of respondents said they strongly agree they were more focused on near-term performance benefits than on ROI. Again, we believe this is due to the impressive 6.3x average ROI from automation efforts realized by respondents last year, which eliminated any doubt about the value of automation.

## Top KPIs used to measure impact of Intelligent Automation

**76%** Productivity

**73%** Quality

**69%** Customer satisfaction

**69%** Cost

**68%** ROI

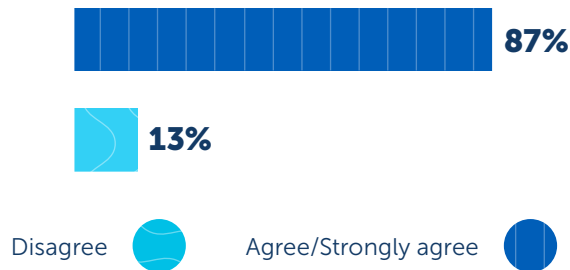


Automation and generative AI are already unlocking **myriad new use cases** across organizations and serving as a crucial catalyst in changing how people work—the operating model—so organizations can increase worker productivity. When combined with generative AI, automation works faster across every system, team, and process to accelerate those productivity gains and provide additional speed and confidence.

## Moving beyond task automation

The vast majority of organizations (87%) realize the need to move beyond task automation/personal productivity to more complex end-to-end process automation to reach these lofty productivity goals. But that requires automation scalability across the organization.

### Percentage of respondents stating next-level growth requires a move beyond low-stakes task automation to end-to-end process transformation



## Why productivity?

**Why is productivity such a concern?** The number of working-age people across the globe is on the decline, according to [The World Bank](#), which is adding to decreasing productivity and an increasing number of job vacancies. It's clear we are in a global productivity crisis. To regain historical growth levels, [McKinsey estimates](#) organizations need a 50% increase in worker productivity. That's a tall order considering the breadth of technology and productivity investments enterprises have already made: [a study by Mulesoft and Deloitte](#) found that today's average enterprise runs over 1,000 applications.

## Overcoming India's productivity challenges with Intelligent Automation

By [McKinsey's estimates](#), to drive the necessary job growth, India's GDP will need to grow by up to 8.5% annually by 2030. That's more than double the 4.2% rate of growth in 2020. And, even as Indian enterprises add millions of jobs, those workers will need to be more productive to sustain that economic growth.

# 59%

of respondents from Indian enterprises believe this next-level growth requires moving beyond low-stakes task automation and to end-to-end process transformation.

This will enable firms to optimize efficiency, scale operations, and address the complexities of growing business. End-to-end process transformation provides a holistic approach to improving productivity, decision-making, and overall competitiveness, positioning these enterprises for future success in a dynamic business landscape.

# 63%

of respondents from Indian enterprises plan to use industry-specific Intelligent Automation to solve for their specialized requirements.

Industry-specific Intelligent Automation tailors functionality to the unique needs and challenges of a particular industry. It includes specialized features and capabilities generic applications lack, enhancing a company's ability to perform industry-specific tasks efficiently. Industry-specific automations and AI technologies also provide an enhanced user experience by meeting the specific needs of users in the sector, resulting in increased user satisfaction and productivity.

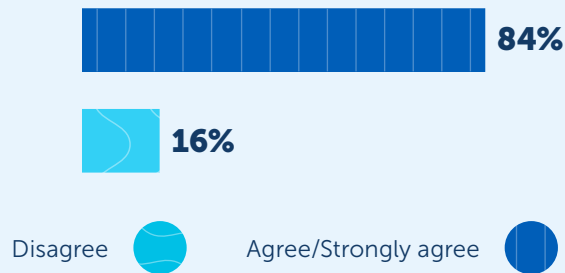
# 80%

of respondents from Indian enterprises plan to determine the impact of Intelligent Automation based on business ROI.

Measurement of the impact of Intelligent Automation is critical, especially on how it contributes to broader business success. Currently, more than 70% of respondents from Indian enterprises say they measure Intelligent Automation success based on customer and employee satisfaction levels and productivity growth.

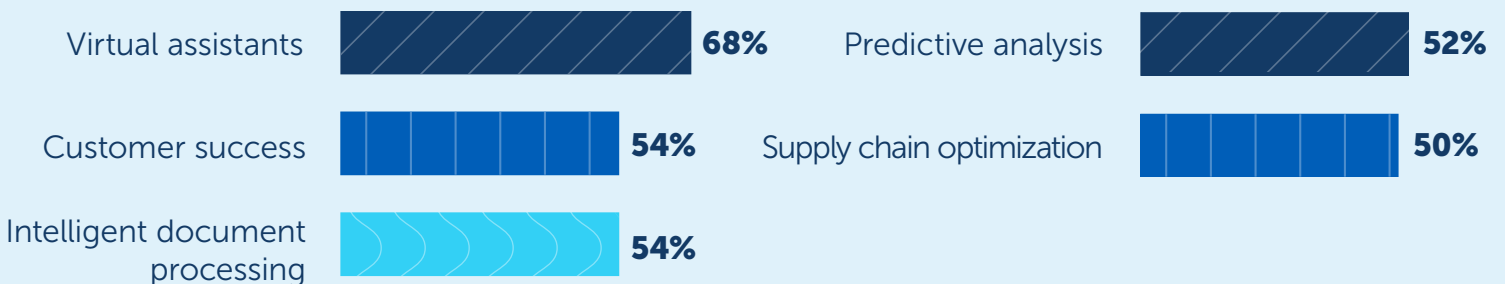
Most respondents (84%) say a single, complete, and connected automation platform is required to scale enterprise-wide productivity. A unified automation platform is one that integrates a variety of capabilities that connect across multiple systems and processes for comprehensive functionality, and drives easier and faster scalability, drives faster impact and ROI.

## Percentage of respondents stating a complete and connected automation platform is required to drive success at scale



Last year, 52% of respondents strongly agreed on the value in intelligent assistants. That confidence generated a rapid rise in generative AI investments and deployments, as reflected in virtual assistants being the number-one use case for Intelligent Automation technology, cited by 68% of respondents—up from just 49% from last year. Customer service and intelligent document processing are tied for the next most-mentioned uses cases for Intelligent Automation, both of which will be greatly improved with generative AI technologies. We expect the use cases for Intelligent Automation to continue expanding as generative AI advances and more organizations develop innovative applications.

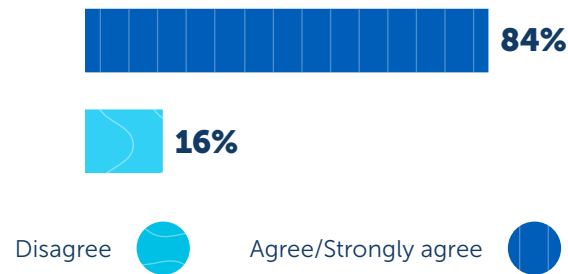
## Percentage of respondents stated use cases for Intelligent Automation technology



**Other use cases selected by more than one-third of respondents include risk management, predictive maintenance, real-time decision-making, and human resources.**

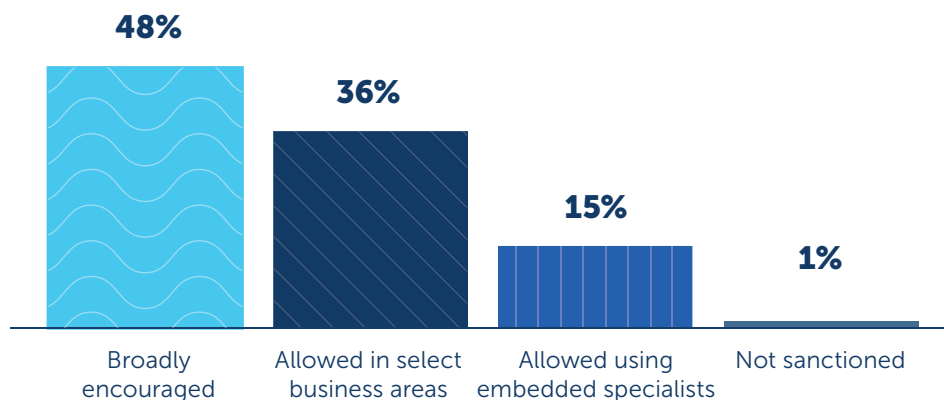
Productivity needs are driving automation investments, which are being accelerated by advances in AI and generative AI technologies. But true transformation requires automation at scale, and automation at scale requires automation development at scale. Business users are crucial to the citizen development efforts that will drive automation scale because business users are most familiar with the business goals automations must be designed to support, and 84% of respondents say that automation initiatives must be developed with business objectives in mind.

### Percentage of respondents stating automation initiatives must be developed with business objectives in mind



Citizen development, or empowering business users to build their own automations, is encouraged at most companies, which is a good sign for future scalability. Globally, 40% of respondents say citizen development is broadly encouraged, and another 41% say it is encouraged in select business areas. But respondents from Indian enterprises say their firms are surpassing those global efforts.

### Percentage of respondents from Indian enterprises stating extent to which citizen development is encouraged to build automations

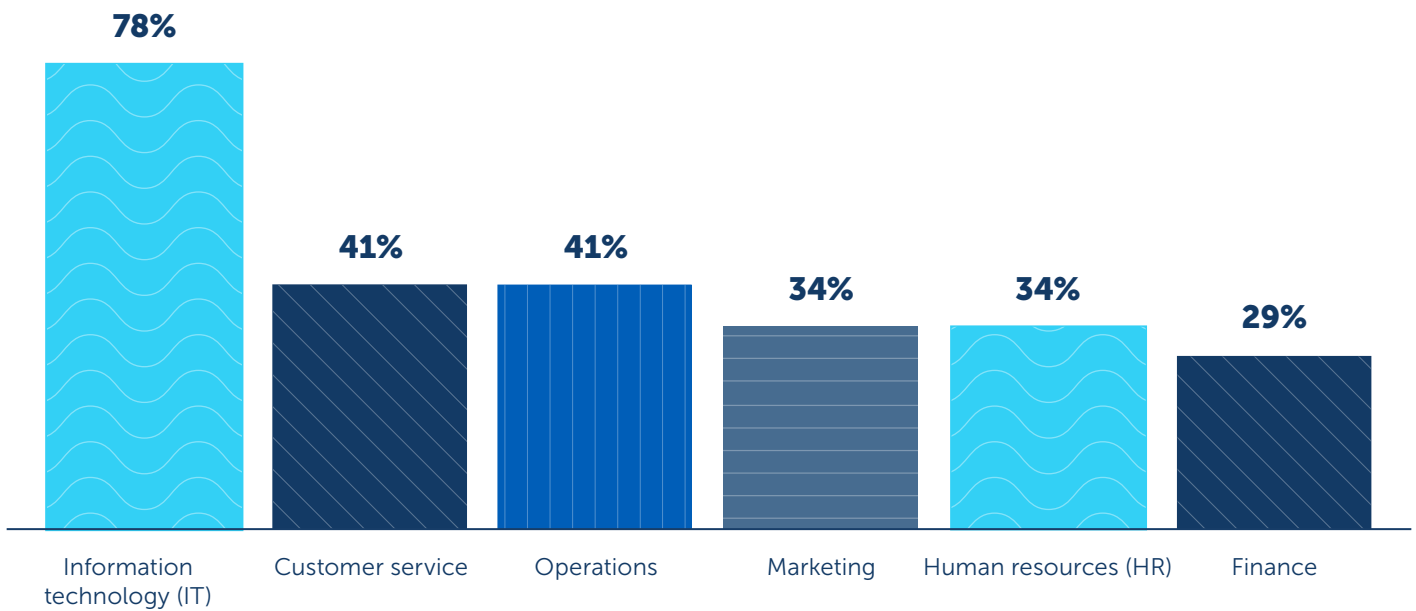


Citizen developers are having a difficult time adopting and succeeding with highly complex tools and automations, however. Plus, respondents from Indian enterprises say security and governance concerns (60%) and a lack of technical skills and training (51%) are preventing automation leaders from encouraging widespread citizen development, among other issues.

We expect generative AI and virtual assistants to unlock automation scalability by helping business users participate in citizen development to automate processes faster, with more accuracy, providing embedded guardrails to adhere to governance, compliance, and consistency rules. It's critical to empower these business users because, as mentioned, business users are more familiar with business objectives than centralized automation developers.

As mentioned above, virtual assistants have become the number-one use case for Intelligent Automation, and organizations see generative AI as the path to expanding automation scale and development by business users. We expect citizen developers will use generative AI-powered virtual assistants to simplify, add consistency and governance, and improve quality in automation development, and to turn conversational requests into accurate automations. Supporting those AI efforts for business users will be IT, since 78% of respondents say IT teams already enable business users to create automations because it alleviates automation development backlogs.

### Percent of teams that enable citizen developers at respondents' organizations



# Automation works!

Below are documented case studies from Automation Anywhere customers showing the impact of Intelligent Automation in their companies.

**Humana.**

**684,000**

hours saved

**Cargill™**

**\$19M**

saved over first 5 years

**TATA | sky**

**10,000**

hours cut from back office processes

**NHS**

**10,000+**

invoices processed end-to-end

**Bancolombia**

**127,000**

hours saved

 **Grant Thornton**

**85%**

reduced financial processing times





# Next becomes the now.

We believe that end-to-end Intelligent Automation is essential for modern organizations, especially as executives navigate fragile supply chains, worker shortages, and growing productivity challenges. AI and generative AI are crucial to these efforts, and we expect investments in Intelligent Automation will continue to grow. But, we advise organizations to take a holistic, collaborative approach to reach enterprise-wide scale. Most respondents (71%) say their organizations are already using a federated (30%) or centralized (41%) center of excellence. That focused effort will push organizations to demand a single, agnostic automation platform for enterprise-wide use and scalability, and one that will enable flexibility in choosing AI and generative AI technologies that help overcome potential risks.



## Predictions

**Using the insights provided in this and previous Automation Now & Next reports, we expect the following to occur in the coming 12 months:**

### AI and automation investments

- We expect the productivity crisis will continue to drive significant automation investments.
- We expect the average investment in Intelligent Automation will exceed \$10 million.
- We expect investments in generative AI-powered automations will far outweigh investments in traditional RPA.

### Preferred Intelligent Automation platforms

- We expect a complete and connected Intelligent Automation platform will be the most common choice for enterprises.
- We expect flexible Intelligent Automation platforms to allow flexibility in choosing appropriate AI and generative AI providers and models.

### Scalability for automations

- We expect organizations to overcome security and privacy worries related to AI as specialized and industry-specific AI applications alleviate underlying concerns.
- We expect generative AI-powered virtual assistants will enable business users to turn conversational requests into consistent, governed, and high-quality complex automations.
- We expect generative AI will accelerate and increase the volume and accuracy of automations created by both professional and citizen developers.



# Tips for getting to “next”

**Navigate the path to transformation with confidence. Use these essential tips to ensure your journey leads to growth and success across your entire enterprise.**

## **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 and by leveraging a complete and connected Intelligent Automation platform.

## **Scale across teams**

- Develop a plan to migrate existing on-premises tools and automations to cloud over time.
- Encourage more citizen development efforts with modern, AI-powered tools that ease, enhance, and govern citizen development.
- 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 productivity gains remain the most critical measure of success.
- Find opportunities to deploy generative AI in automation development for faster, more accurate automations.
- Integrate generative AI into automation workflows to generate content such as emails or enable interactive conversations that keep automations moving.
- Use end-to-end automations to give workers more time to focus on higher-value work and drive increased overall productivity.

# Scalability

Generative AI technologies accelerate automation scale by empowering business users.

## NOW

**85%** of respondents say automations must support business objectives.

**82%** of respondents actively support citizen development.

**49%** of respondents say security and governance concerns are barriers to citizen development.



## NEXT

We expect generative AI to be the catalyst of automation scalability as automation moves from routine tasks to supporting strategic business objectives. IT has been taking the lead in enabling business users to develop automations, and we expect IT to continue leading those efforts.

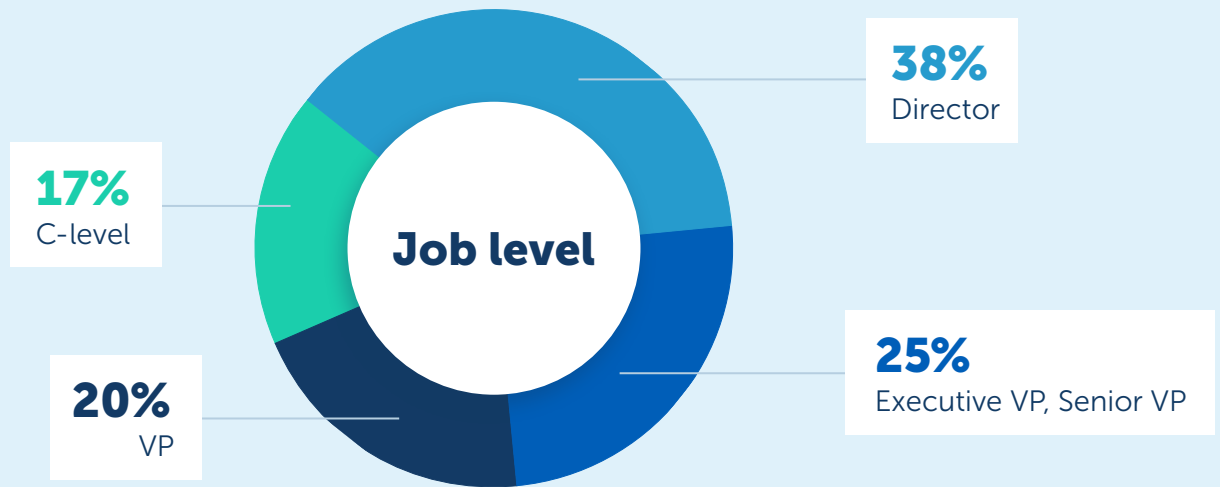


## Key trends

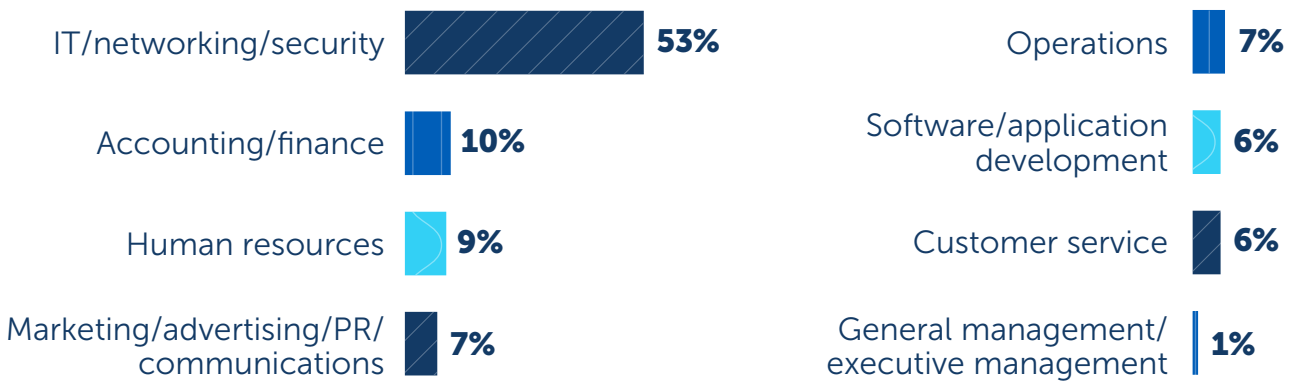
- Citizen developers who understand business objectives are essential to automation scalability.
- AI and virtual assistants will help overcome top citizen development adoption barriers.
- IT is the biggest supporter of citizen development efforts.

# Survey demographics

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



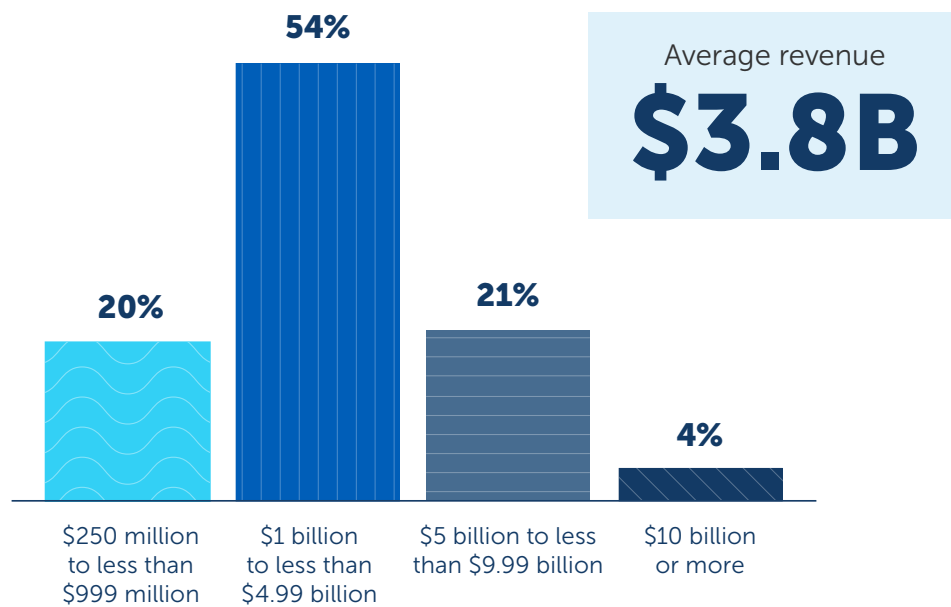
## Functional role



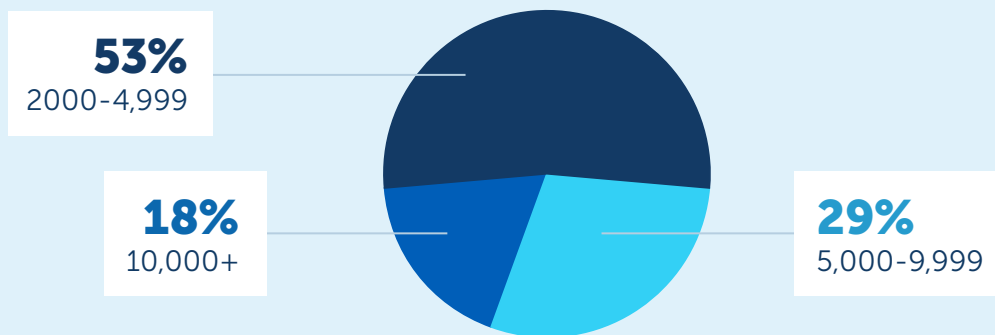
# Survey demographics

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

## Company size by revenue



## Company size by number of employees



## Industries

<b>10%</b> Telecom	<b>14%</b> Retail/consumer
<b>11%</b> Transportation	<b>14%</b> Industrials/materials/manufacturing
<b>12%</b> Finance/insurance	<b>14%</b> Services/consulting
<b>13%</b> Healthcare/life sciences	<b>13%</b> Technology

# 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.

## 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.

## Business users

A business user refers to a non-technical professional within an organization who actively participates in the automation process. These individuals are typically from various business departments and possess in-depth knowledge of their specific workflows, tasks, and processes.

## Center of excellence (CoE)

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 CoE

A centralized CoE operates 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 CoE

A federated CoE operates 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.

# Key terms

## **Citizen developer**

A citizen developer is a business user who deeply understands business processes and contributes to building automations—enabling organizations to innovate faster than their competitors by leveraging the business expertise of their business users and the development expertise of their IT teams.

## **Generative AI**

Generative AI is a subset of artificial intelligence that focuses on enabling machines to generate new and original content, such as images, text, music, or videos, that is not directly copied from existing data.

## **Intelligent Automation**

Intelligent Automation is the combination of various automation technologies like RPA, AI, 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.

## **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.

## **Virtual assistant**

A virtual assistant is an AI program or software application designed to perform tasks and provide services to users through conversational interfaces, typically voice-based or text-based. Virtual assistants can assist with a wide range of tasks, such as answering questions, providing information, setting reminders, managing schedules, and executing various other tasks based on user commands and queries.

# AUTOMATION NOW & NEXT

## About Automation Anywhere

Automation Anywhere is the leader in Intelligent Automation solutions that put AI to work across every aspect of an organization. The company's Automation Success Platform is infused with generative AI and offers process discovery, RPA, end-to-end process orchestration, document processing, and analytics, with a security and governance-first approach. With more than 5,000 customers worldwide, Automation Anywhere enables organizations to unleash productivity gains, drive innovation, improve customer service, and accelerate business growth. The company is guided by its vision to fuel the future of work by unleashing human potential through Intelligent Automation. Learn more at [automationanywhere.com](https://www.automationanywhere.com).

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