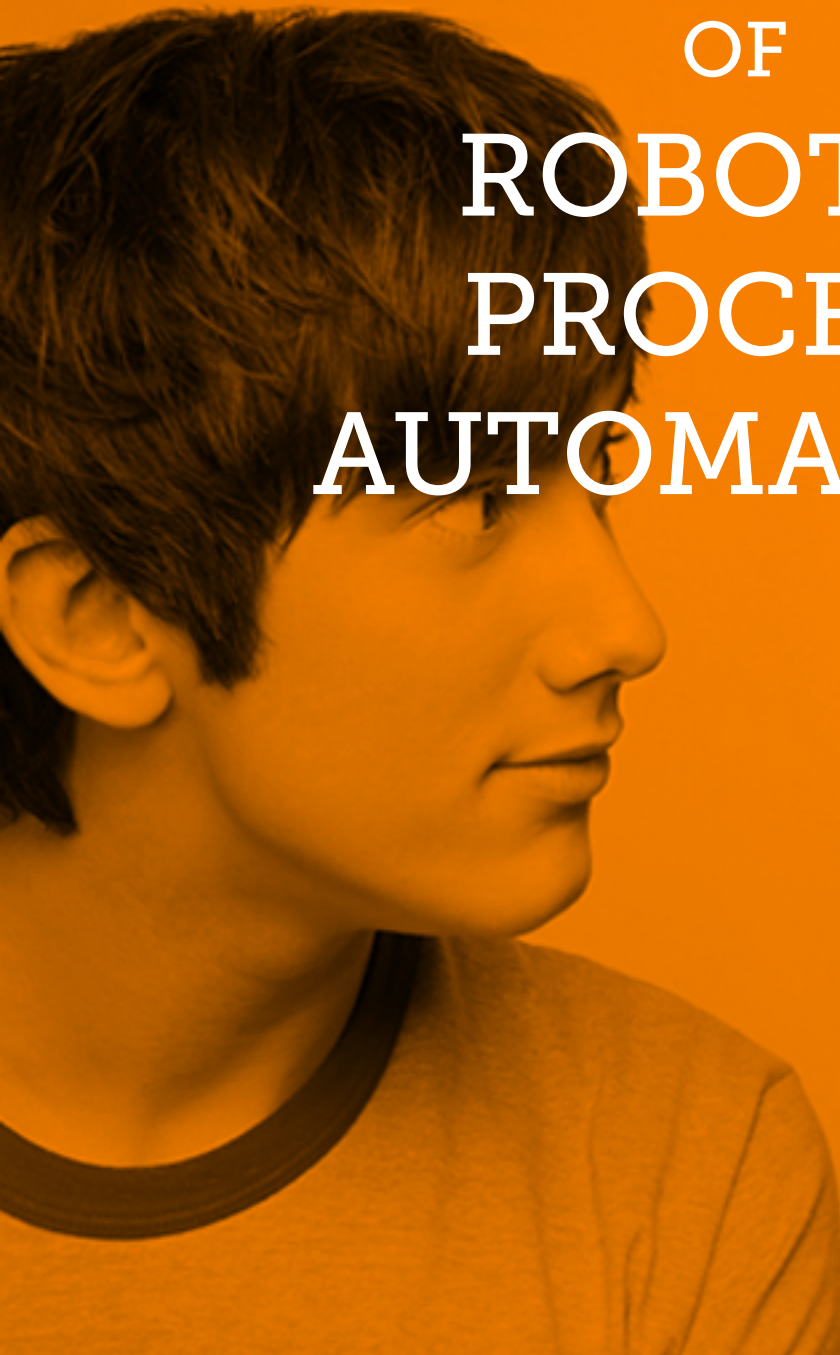THE
EVOLVING MATURITY
OF
ROBOTIC
PROCESS
AUTOMATION

THE EVOLVING MATURITY OF ROBOTIC PROCESS AUTOMATION

Author:
Charles Sutherland, EVP of Research, HfS Research
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Introduction

Since HfS Research first began covering the emergence of the new technologies in robotic process automation (RPA) several years ago, we have seen this become one of the foremost trends in BPO marketplace. It is now on the strategic agenda of every major BPO service provider, third party advisor and increasingly on the minds of enterprise buyers of BPO as well. HfS is continuously talking to BPO service providers about their strategies and programs for RPA and in recent months we have seen sufficient development in these such that we decided that it was the right time to introduce a Maturity Model for RPA that encapsulates all of the discussions we have had.

This Maturity Model is intended for a variety of audiences across the BPO market from service providers to enterprise buyers with RPA software developers and third party advisors/consultants also being potential users of this model as each group seeks to understand and assess the different approaches to RPA that are out there and how mature they are in comparison to each other.

We built this RPA Maturity Model around three Levels and 10 Elements to reflect the variety of decisions and actions that comprise an RPA program. The levels begin with "Initialization" moving to "Industrialization" and ending in "Institutionalization". The elements include understanding the primary goal of RPA, to the technology vision for RPA, to the model for extracting value from the data created by RPA implementations and beyond.

As we built this RPA Maturity Model and tested it out with BPO Service Providers including during the recent NASSCOM BPM Summit 2014, we began to see that there are three major potential groupings of BPO service providers today in how they are approaching RPA. In this paper we look more closely at what they are from "The Deal Led Service Provider" to "The Delivery Center Industrialization Led Service Provider" and "The Business Platform Visionary RPA Service Provider".

Finally, we looked at where the RPA capability and with that the Maturity Model can go and what might comprise a future Level 4 as we have already seen just how far this has come in two years to become an integral part of the BPO solution stack.

RPA is in need of a Maturity Model now

HfS first started writing on the new tools of Robotic Process Automation (RPA) over two years ago. Since that time we have continued our research, launched the first Robotic Premier League (RPL) with twenty service providers profiled and the topic has become part of the strategies of every major BPO service provider while also becoming a mainstream conference topic in shared services as well as BPO. However, for all this coverage, HfS believes that we are still at the relative infancy of RPA and that even within most service providers, let alone across them the full sense as to what it means to have a mature (rather than an experimental) RPA capability remains unclear. Much of the coverage of RPA remains simplistic, even naïve and has yet to reflect what it actually requires to bring this exciting capability into the standard operations of a BPO service provider or a shared services operations in a multinational.

Over the last several months as we checked in on the first rounds of RPA deployments and evaluated the RPA strategies and programs of 15 different service providers, it became clear to us that the entire RPA ecosystem (BPO service providers, RPA software developers, third party advisors/consultants and enterprise buyers) could all benefit from having someone pull together these different programs and create a consolidated maturity model on RPA for the industry. That is just what we have done. We've looked at what we think are the critical Elements to an RPA program and assembled those into a three Level maturity model that can help all members of the RPA ecosystem understand where they are and what else they should be thinking about or doing to bring RPA into the center of planning and delivery. Without this we think that ecosystem members will struggle to categorize not only their own programs but also to understand what other partners in the ecosystem are doing with regards to RPA. We believe that this 2014 version of an RPA Maturity Model will play a role in bringing RPA out from a trendy topic that people are still working to understand and into a capability that can be managed for better results for all.

We shared an early version of this Maturity Model during the closing keynote address at this year's NASSCOM BPM Strategy Summit 2014 in Bangalore last month and based on the questions after the address, we believe we have addressed a real but so far unspoken need with this Maturity Model.

The users and value of the RPA Maturity Model

This RPA Maturity Model is intended to be useful for all stakeholders in the RPA marketplace including: BPO service providers, RPA software developers, third party advisors/consultants and enterprise buyers. We believe that it can both guide conversations within the ecosystem and help each party to assess where a service provider sits with regards to the maturity of their RPA strategy and program.

For BPO service providers, the RPA Maturity Model can answer:

» What are all the Elements I should be considering when bringing RPA into my strategy and operations?

» What else do I need to be doing?

» How might other members of the RPA ecosystem evaluate what I am doing in comparison to others?

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For RPA software developers, the RPA Maturity Model can answer:

» How mature is a BPO service provider in their thinking about RPA?

» What might the BPO service provider be going with their RPA strategy and program?

» Which BPO service providers are most compatible with my own RPA roadmap?

For third party advisors/consultant, the RPA Maturity Model can answer:

» How developed is the thinking of a given BPO service provider with regards to RPA?

» IS RPA a credible tool in the portfolio of that BPO service provider?

» How might I be able to help a BPO service provider become more mature in RPA?

For enterprise BPO buyers, the RPA Maturity Model can answer:

» How mature is/are my current/future BPO service providers(s) with regards to RPA?

» If I were to think about RPA in the same way that a service provider would, how mature would I be?

» Where should the innovation and investment in RPA be coming next in BPO service providers?

The Levels of the RPA Maturity Model

We designed the RPA Maturity Model around two different components. The first component is the Elements of which there are 10, which comprise each of the different aspects of RPA strategy, and operational programs that came out during our interviews with 15 BPO service providers who are using RPA in some form today. The second component is the Levels of RPA maturity as shown in Exhibit 1. These three Levels (with the possibility of more analyzed at the end of this report) are composed of different states of the Elements that share some common characteristics. These three Levels are not sequential, in that you don't have to progress from Level 1 to Level 2 and then Level 3. Instead it is possible to by-pass Level 2 when as a BPO service provider you make a significant change in the strategic importance and approach to RPA at an early stage in the lifecycle. It is also possible to be engaged in some elements at different Levels to where you are in the majority because of individual strategic and operational decisions that are being made with regard to RPA. What the Levels do represent however is a way of generally describing the overall maturity of a BPO service provider in terms of how they are approaching the design and implementation of an RPA capability across their offerings and delivery structure.

» **Level 1 – Initialization** - is built around common theme of experimentation and a BPO service provider who is only making initial steps into understanding RPA and deploying it within the existing delivery contract base. A service providers characterized by this Level is still unsure whether to make broad commitments to RPA or to just keep it at the edges of their contractual portfolio.

» **Level 2 – Industrialization** – is built around a common theme of tactical commitment across a BPO service provider to the concept and capability of RPA. A service provider characterized by this Level has seen the value of RPA but are still largely in a reactive mode and making managed commitments and investments in the capability.

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» **Level 3 – Institutionalization** – is built around a common theme of broad strategic commitment by a BPO service provider to the transformational potential of RPA on their business and operations. A service provider characterized by this Level is making a sizeable, executive led investment in RPA with a view to creating a fundamental change in the commercial and delivery operations of the business.

Later in this report, we will look further at ways of describing the service providers who largely sit within these Levels today and what else they may have in common strategically and tactically.

Exhibit 1: Levels of the RPA Maturity Model

The HfS Research Maturity Model for RPA

Level 3 - Institutionalization

Level 2 - Industrialization

Level 1 - Initialization

Source: HfS Research 2014

The 10 Elements of the Maturity Model

Having described the Levels of the RPA Maturity Model, the next component to walk through are the Elements. These are composed of the different aspects of RPA strategy and operational programs that came out during our interviews with 15 BPO service providers who are using RPA in some for today. These are a mix of Elements which where service providers are making explicit decisions and actions and others which we don't believe are more implicit at this point in the development of RPA and it was only though the interviewing of so many different service providers that we as a third party were able to see that this Element exists and how it is being seen and acted upon in different ways. We believe that every service provider is therefore working within each of these Elements although that may not always be self-apparent so part of the value of the RPA Maturity Model is that it brings some of these Elements to light in a way that they might not otherwise be seen at this time.

In identifying these 10 Elements we were looking for decisions where the choices being made and acted upon are having a significant impact on the intensity and direction of the service providers approach to RPA and as a result an accompanying impact on their internal operations and on their client delivery. Over time there may be

additional Elements that come to light especially as RPA becomes more embedded in service provider specific business platforms and other technology offerings but we believe this current set of 10 Elements is a good place to build an RPA Maturity Model upon.

So let's look at the total set of Elements and Levels in the RPA Maturity Model in Exhibit 2 and then breakdown the reason why each of the 10 Elements was identified.

Exhibit 2: Elements of the RPA Maturity Model

The 10 Elements of the Maturity Model for RPA

	Primary Goal of RPA	RPA Program Owner	Vision of Deployed RPA	RPA Tech Vision	RPA Expertise Owned By	RPA Program Funding	Vision for Processes Addressed By RPA	Approach to Client-Service Provider RPA Partnership	Value of RPA Data for Analytics	Current Long Term Vision for RPA
Institutionalization	Adding Cognition	BPO/BPM CTO or COO	Robots As A Service	Integrated into Service Provider Business Platforms	RPA COE	Extensive Centralized Subsidies for OPEX and CAPEX	Willing to Re-engineer processes to build around RPA and collect IP	Planned RPA Roadmap with Clients Both Business and IT Owners	RPA Data Auto Extracted and Built into Dashboards	Striving for "Self-Healing" Robots
Industrialization	Augmenting Specialists	Global Process or Lean/6 Sigma Lead	Datacenter of Robots	Integrated into Clients Apps and Workflows	Lean or 6 Sigma Teams	Limited Centralized OPEX Funding the Rest is Client Based	Looking For Common Process Steps Across Functions & Clients	Methodical About Asking Clients To Identify Changes In Their Setup	RPA Data Extracted in Systematic Manner For Delivery Reporting	Designing Robots for Ongoing Flexibility
Initialization	Replacing Transaction Labor	Client Team Leads or Center Leads	Individual Robots	Primarily around Citrix Access	Individual Business Analysts	Project Based or Client Recovery	Maintain Processes As They Are	Primarily Deploying Behind The Service Provider Firewall To Avoid Requests for Clients	RPA Data Used for Ad-hoc Queries	Leaving the Robots Static or Fixed Over Time

Source: HfS Research 2014

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1. **Primary Goal of RPA.** An understanding of what the primary goal of an RPA program is central to the maturity of a service provider's strategy because it impacts most of the other elements including for example where ownership is likely to rest, how much and what type of investments will be made and more. HfS's view is that a more mature RPA strategy is looking beyond replacing transactional labor often seen as the "low-hanging fruit" and instead considering how RPA can augment and extend the capabilities of specialized roles including cognitive processing support that takes further tasks from the hands of humans and brings machine learning and artificial intelligence skills into RPA. One caveat to this is that, we aren't implying that processes with cognitive capability applied are "better"; instead we believe that maturity comes from looking at where those capabilities can be applied now and going forward.

2. **RPA Program Owner.** HfS believes that having an RPA strategy is a critical element to being successful in today's BPO market and that a sign of the maturity of such a strategy is the seniority of the program lead. It can be beneficial to have a dedicated RPA lead but we think its more critical that the strategy be directed at the leadership team level of the service provider so that opportunities for more transformative deployment than can be seen at the individual client or delivery center lead are possible.

3. **Vision of Deployed RPA.** This element is where we see some of the greatest differences in views not only across BPO service providers but within them as well at the moment. With BPO traditionally being a very contract specific market, so to is RPA seen by many as being all about the individual deployment of robots to specific individual contract delivery as well. In fact this is the dominant model we see based on our interviews. However, we have seen some examples where BPO service providers (generally those with a more centralized view of investment funding – more on this soon) see that value from RPA will be maximized when looking at this as a shared capability across clients, even going so far as to imagine it as a shared utility of RPA that can be delivered and costed on an as needed as a service capability.

4. **RPA Tech Vision.** BPO is delivered within some form of technology environment ranging from remote Citrix based access to proprietary end-to-end business platform solutions from the service provider. Many of the early RPA deployments were implemented in the Citrix environment, as the complexity of those solutions was lower. We believe that maturity rises as service providers look at more complex and comprehensive integration of RPA, which is beginning today but will take time to evolve as many of those solutions are just emerging onto the market themselves.

5. **RPA Expertise Owned By.** As we have watched the first RPA implementations go-live in many service providers we noticed that in many cases, the knowledge being created was not being effectively captured for re-use and enhanced operating efficiency. This was usually because RPA was being deployed in a siloed manner with individual technology and business analysts learning as they went along. Real maturity in RPA comes from moving out of this individualized skunk-works model and moving towards the creation of an RPA center of excellence (COE) that collects and distributes both the accumulate experience but shares the components (including process libraries) across future pilots and deployments.

6. **RPA Program Funding.** Over the years BPO service providers have often funded innovation not from a centrally managed pool of operational and capital expenditures but instead through recovery at the client deal or even delivery center location level. HfS believes that as the BPO market increases its reliance on technology (rather than people alone) in solutions that it's necessary to move away from this deal specific model and move to a more mature centralized budgeting function run through the leadership team of the BPO service provider. A centralized budget can make it possible to implement RPA (and other technologies) in deals where up this might not otherwise be possible.

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7. **Vision for Processes Addressed by RPA.** One of the benefits of many RPA solutions is that they can be implemented to essentially use the software robots to "mimic" the steps currently undertaken by a human agent in a business process. We have seen this first hand on delivery center tours where the team connects a monitor to the robot and has us compare the processing on screen with that of an agent doing the same process nearby. This approach can certainly drive real benefits for service providers and enterprise clients but we would suggest that in many cases this is a relatively immature approach. A more mature model is to step back and look at a process to see how RPA with its 24x7 capabilities can drive a fundamental change in the process. During the first early RPA deployments it wasn't always possible to see this impact as the scope of utilization was often limited and tight but we are beginning to see more visionary implementations coming on stream that have re-engineered large portions of existing processes to account for the capabilities of RPA to go beyond just mimicry of the traditional process steps.

8. **Approach to Client-Service Provider RPA Partnership.** A critical success factor for RPA programs is often having visibility into pending changes in the client technology environment so that unforeseen minor and major changes there don't result in the breakdown of RPA based delivery. The most mature model for RPA deployment we have seen is when a service provider and a client recognize that there is this dependency and takes active steps to share roadmaps for changes in the technology environment (from both sides). When RPA is implemented in legacy BPO contracts where this level of shared visibility has not previously been in place (or perhaps necessary), it can represent a radical change in the operating and governance model for both organizations.

9. **Vision of RPA Data for Analytics.** One of the still under-appreciated benefits from RPA deployments is the increased availability (especially often in remote access Citrix solutions) of data on the performance of the software robot agents. In many cases this performance level data is a significant increase on what was available for human agent performance on the same process before. More RPA mature BPO service providers are beginning to collect this data automatically and build it into the performance dashboards they use to manage delivery and share insights with enterprise clients. Doing this requires not just maturity on RPA but also maturity from the service provider with regards to how they use data and analytics in their own operations as well. As a result, we are still seeing many cases where this data is not integrated into operations and at best accessed on an occasional ad-hoc basis but we're hopeful that as the overall mindset on operating data advances so too will the maturity of the vision for data from RPA.

10. **Current Long Term Vision for RPA.** The final Element assesses how the BPO service provider thinks about RPA technology itself and where it is likely to go over the next several years. At the least mature level they are treating RPA as a short-term relatively static capability that won't necessarily evolve and will likely be replaced by another entirely different solution before long. At the most mature level we saw service providers who know that yes RPA will change and they can help it change together wit the RPA software developers to a point where it becomes more than a static cost reduction tool of the moment and into a flexible and ultimately potentially self-learning or "self-healing" capability that adapts in response to changes in the process and technology delivery environment around itself.

The types of service providers in the RPA Maturity Model

As we looked back at the interviews with the BPO service providers that formed the RPA Maturity Model we realized that there were several recurring "types" of service providers within this group. In reality each BPO service provider is unique in how it is approaching RPA but we believe that these three general types can be used to better describe how RPA is being implemented today across the market.

The first type we saw is perhaps still the dominant one by numbers today. We call this the "Deal Led RPA Service Provider" as depicted in Exhibit 3. The common characteristics are that they are largely (if not entirely in some cases) operating at Level 1 of the model across the Elements. For these service providers RPA is a means to a short-term end of cost reduction for existing clients and/or being more competitive for renewals or new contract opportunities. Overall there is less of an RPA strategy in place then a very tactical, contract specific application for some of the benefits available from RPA deployment.

A special thanks to Automation Anywhere for their collaboration on this research study.

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Exhibit 3: The Deal Led RPA Service Provider

The Deal Led Service Provider

	Primary Goal of RPA	RPA Program Owner	Vision of Deployed RPA	RPA Tech Vision	RPA Expertise Owned By	RPA Program Funding	Vision for Processes Addressed By RPA	Approach to Client-Service Provider RPA Partnership	Value of RPA Data for Analytics	Current Long Term Vision for RPA
Institutionalization										
Industrialization	Augmenting Specialists			Integrated into Clients Apps and Workflows	Lean or 6 Sigma Teams			Methodical About Asking Clients To Identify Changes In Their Setup		
Initialization	Replacing Transaction Labor	Client Team Leads or Center Leads	Individual Robots	Primarily around Citrix Access	Individual Business Analysts	Project Based or Client Recovery	Maintain Processes As They Are	Primarily Deploying Behind The Service Provider Firewall To Avoid Requests for Clients	RPA Data Used for Ad-hoc Queries	Leaving the Robots Static or Fixed Over Time

Source: HfS Research 2014

The second type we saw is still emerging but where we believe the majority of BPO service providers will be over the course of the next year. We call this the "Delivery Center Industrialized Led RPA Service Provider" as depicted in Exhibit 4. The common characteristics are that they are operating between Level 1 and Level 2 of the Elements. These service providers have tested and had success with RPA and see the opportunity to deploy it across a contract base sometimes by offering and sometimes by delivery center. In this regard, it is a more strategic thinking model for RPA but still largely limiting itself to the "low hanging" benefits of RPA. By that we mean that the integration into service provider specific technologies of RPA capabilities may still be fairly limited and ownership of the RPA vision may be held with local deliver more than at the senior leadership or offering or technology managers.

Exhibit 4: The Delivery Center Industrialization Led RPA Service Provider

The Delivery Center Industrialization Led Service Provider

	Primary Goal of RPA	RPA Program Owner	Vision of Deployed RPA	RPA Tech Vision	RPA Expertise Owned By	RPA Program Funding	Vision for Processes Addressed By RPA	Approach to Client-Service Provider RPA Partnership	Value of RPA Data for Analytics	Current Long Term Vision for RPA
Institutionalization										
Industrialization	Augmenting Specialists		Datacenter of Robots	Integrated into Clients Apps and Workflows	Lean or 6 Sigma Teams	Limited Centralized OPEX Funding the Rest is Client Based	Looking For Common Process Steps Across Functions & Clients		RPA Data Extracted in Systematic Manner For Delivery Reporting	Designing Robots for Ongoing Flexibility
Initialization	Replacing Transaction Labor	Client Team Leads or Center Leads		Primarily around Citrix Access				Primarily Deploying Behind The Service Provider Firewall To Avoid Requests for Clients		

Source: HfS Research 2014

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The final type we saw at the moment is even more rare than the other two and may not become the majority type any time soon. We call this the "Business Platform Visionary RPA Service Provider" as depicted in Exhibit 5. The common characteristics are that they are making an across the board effort to drive an RPA strategy and program at Level 3 of the RPA Maturity Model. These service providers have decided at the most senior leadership have tested and had success with RPA and see the opportunity to deploy it across a contract base sometimes by offering and sometimes by delivery center. Operating in this type doesn't happen in isolation but occurs when the BPO service provider is also making a commitment to integrating business platform technologies and analytics into the heart of what they are doing and is willing to make the centralized investments necessary to bring this to reality. HfS believes that this model will occur first with specialist service providers who are focused in their service offerings or at a focused offering level (e.g. HRO, Procurement, Healthcare, etc…) within the broad multi-process based BPO service providers. There are even specialist RPA based service providers who are showing the way with this model today and more that we can see emerging over the next 6-18 months.

Exhibit 5: The Business Platform Visionary RPA Service Provider

The Business Platform Visionary RPA Service Provider

	Primary Goal of RPA	RPA Program Owner	Vision of Deployed RPA	RPA Tech Vision	RPA Expertise Owned By	RPA Program Funding	Vision for Processes Addressed By RPA	Approach to Client-Service Provider RPA Partnership	Value of RPA Data for Analytics	Current Long Term Vision for RPA
Institutionalization	Adding Cognition	BPO/BPM CTO or COO	Robots As A Service	Integrated into Service Provider Business Platforms	RPA COE	Extensive Centralized Subsidies for OPEX and CAPEX	Willing to Re-engineer processes to build around RPA and collect IP	Planned RPA Roadmap with Clients Both Business and IT Owners	RPA Data Auto Extracted and Built into Dashboards	Striving for "Self-Healing" Robots
Industrialization	Augmenting Specialists									
Initialization										

Source: HfS Research 2014

Level 4 and the future of RPA

Unlike other maturity models, it isn't necessary to be at the top of the RPA Maturity Model with anything less being a negative event. Rather, the RPA Maturity Model is much more about the vision that a BPO service provider has for what role RPA should have in their overall solution set and business with room in the BPO marketplace for many different approaches over the next several years. HfS believes that RPA is here to stay (at least throughout this decade) as it extends the value proposition of traditional approaches to BPO based on labor and productivity enhancements around legacy applications and ERPs in particular.

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We are still a ways away for most processes from the state of true new end-to-end digital transactional applications that drive an entirely new model for business process delivery and until we get there RPA can be one of the significant sources of value creation for service providers and enterprise clients. In this interim period between today and the end-to-end native digital process we believe RPA will continue to evolve. RPA software developers will add new functionality to the current set of applications and service providers will learn how to create RPA as a service models and integrate the functionality into their own platforms further. As that happens we believe we will see the creation of a further Level 4 to this RPA Maturity Model, a Level that might come to be called "Innateness". In this additional Level 4, it may be that the lines between RPA as deployed by BPO service providers on behalf of their enterprise clients and the RPA capabilities that may be adopted inside the client's internal operations will come together and a new hybrid model of coordination and delivery will emerge.

So we'll be looking for signs that is emerging and what the Elements are that will comprise that Level as we continue our ongoing interviews with service providers, software developers, advisors and enterprise buyers in this fast moving market of RPA for BPO and for enterprise clients.

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About the Author

Charles Sutherland

Charles Sutherland is the Executive President of Research HfS Research. In this role he oversees the entire research agenda for HfS while also maintaining coverage personally over supply chain, procurement and mortgage services. He also researches and writes about BPO service provide strategies and how automation and SMAC (Social, Mobility, Analytics and Cloud) is creating value for buyers and new sources of growth for the BPO marketplace.

Charles has been in the BPO marketplace for more than 12 years including roles as the Chief Strategy Officer for SourceHOV and the Managing Director, Growth & Strategy for Accenture's multi-billion dollar BPO Growth Platform. In these roles he has had a breadth of experience in thought leadership, strategy development, acquisitions, business development and long term investment planning in BPO.

Charles has also had Growth & Strategy roles for Accenture in Infrastructure Outsourcing and for the Communications, Media and High Tech Operating Group. Prior to that he was a Strategy Consultant in London for Accenture serving clients in the Media, Communications and Consumer Goods industries. If you go even further back in time he was also a Marketing Director for Olivetti in Canada and Europe.

Charles has an MBA from INSEAD in Fontainebleau, France and an Honors BA in Economics and Political Science from the University of Toronto.

Charles now resides in Southlake, Texas where his sartorial choices showing support for the Red Sox, Bruins, Arsenal and Australian Cricket have been known to draw a few looks of surprise.

He can be reached at charles.sutherland@hfsresearch.com.

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To learn more about HfS Research, please email research@HfSResearch.com.

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At Automation Anywhere, we believe that people who have time to create, think, and discover build great companies. That's why we've dedicated the last decade to driving the adoption of robotic process automation technology in leading Financial Services, BPO, Healthcare, Technology, and Insurance companies—to name a few—across more than 90 countries. Our intelligent process robots transform the way businesses operate, delivering complex business and IT work across a range of processes including procure-to-pay, quote-to-cash, HR administration, claims processing, and thousands of other front and back office processes.

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