

# The State of Robotic Process Automation

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## Introduction

Robotic process automation (RPA) continues to have a major impact on businesses looking to work more efficiently as they meet the challenges of a changing operating landscape. Management consultants McKinsey expect RPA to have an economic impact of \$6.7 trillion by 2025.

From digitalisation of time-consuming manual processes to accessing information stored across data silos, RPA applications help businesses deliver cost-savings, time efficiencies and improved data analysis, making it a key tool on the road to smarter business operations. But the market is still young for this technology that in its current form has only been around since the start of the 21st century.

The key lesson is that RPA technology can help all types of business improve their performance. And as modern RPA solutions develop with AI services, they will address more processes and areas of business need, creating new solutions that are smarter, joined-up and capable of delivering even greater value.

#### In our state of RPA report we show:

- The current and potential uses for RPA, along with the benefits offered and the adoption challenges that businesses face.
- Tasks where RPA can create and add value to business processes.
- Where RPA is used within client organisations and their interest in deploying the service.
- The departments winning the battle to highlight RPA success.



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# Chapter 1 The Data Behind Our Survey and RPA Adoption

Insights for Professionals in partnership with Automation Anywhere conducted extensive market research among businesses using or interested in RPA adoption. Their responses help demonstrate the interest and deployment of RPA and the levels at which the discussion on RPA is being held in their offices.

Additionally, the research highlights the different levels of authority involved in project decision making and which industries are hot spots for RPA, along with the messaging that needs to be refined or clarified to develop further adoption.

Of the responding businesses, 30% have over 5,000 staff, 29% have between 1,000 and 4,999 staff with the remainder below 1,000 employees. They cover a range of industries from manufacturing to accountancy, not for profits to recruitment and with varying levels of adoption and interest in RPA.

#### **1.1 Authority for RPA Interest or Deployment**

When it comes to business authority for RPA awareness and decision making, our respondents cover a range of roles. The majority of interest comes from the Manager level (42%) with an equal split among Director-level (29%) and Influencers (29%), all of which having some level of authority in the RPA process.

Differences are noted when it comes to their opinions on RPA, with Managers (11%) and Directors (7%) already more likely to be implementing RPA, compared to Influencers (4%)



Managers are more likely (11%) to rate themselves as being "Aware of the benefits but not looking at it right now", suggesting they may be tackling projects already underway and not have the time to explore it yet. It's also likely that they'd require stakeholder buy in across the organisation to enact an RPA programme, which may be easier with top down support from the board.



#### **1.2 Industry Groups and Adoption**

Manufacturing is ahead of the pack when it comes to the type of organisation using RPA among surveyed businesses (11%), followed by Local Government (8%) with Finance and Banking, and IT tied for third (7.69%). Retail, transport and consultancies are other notable mentions.



#### **RPA** in Manufacturing

Within Manufacturers, 29% are already implementing RPA, 21% want to get involved and 21% are aware of the benefits but are not looking at it right now, with 11% considering there are some solutions they would like to use. Only 3.5% believe that RPA is too expensive to implement.



AWARE OF

BENEFITS, NOT

LOOKING NOW

WANT TO GET

INVOLVED



SOLUTIONS

TO USE



CONSIDERING

BELIEVE IS TOO EXPENSIVE

#### Is implementing RPA time consuming?

A third of IT businesses consider RPA too time consuming to implement, as well as 17% of the Automotive, Finance and Banking and Transport and Distribution industry groups, suggesting that the time saving message from RPA vendors is not clear enough to some prospects or clients.



ALREADY

IMPLEMENTING

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#### Current usage of RPA

Of those respondents that are already using RPA, 9% have trialled RPA, 30% have one or two robots in place, 35% have between 5-20 bots in place while 19% have over 20 bots in operation.



#### Company size comparison:

Already using RPA Vs. Wanting to get involved



Unsurprisingly, smaller companies are more agile when it comes to implementing RPA solutions but adoption isn't seen as a top priority. For companies with 250-499 employees, 32% are already using RPA whilst an additional 6.5% want to get involved. For companies with 500-2499, adoption is just 21% with only almost double the amount of businesses wanting to get involved (12%). For companies with 2500-4999 and larger enterprises of 5,000+, the adoption rate is less than a quarter (23%) with 16% wanting to get involved right now.



#### 2.1 The Benefits of RPA

Any RPA vendor selling a solution markets a clear set of benefits to customers, and their value is reflected in the responses found in the survey. However, it looks like some explanation is still required in order to convince prospects of the business benefits.

When asked about the key benefits of RPA, respondents see the removal or reduction of repetitive tasks (19%) and reduced risk of human error (19%) as the most important. These represent the key benefits of RPA as expected by vendors and customers alike. The third key benefit is the use of RPA as a cost-saving initiative, scoring 18% of votes.

Additional user benefits include more time for high value tasks (16%) and redeploying staff into more value-adding roles (14%), again highlighting the time-saving value of the technology and the ability to retain staff for more useful work.

When looking at the technical aspects of RPA, 7% of respondents appreciate the value of RPA







#### 2.2 The Challenges Facing RPA Adoption



**16%** of respondents find identifying suitable processes to automate a challenge



As with any technology, there are many barriers to adoption within an organisation. These can range from executive level distrust of automation to a chaotic IT environment in which the customers think RPA will struggle to fit.

The lead challenge identified among respondents was in identifying suitable processes to automate (16%). Given that most vendors provide long lists of suitable tasks in their marketing, perhaps refocusing language on the business benefits and solutions could provide a clearer picture.

The second most significant challenge is businesses seeking to improve processes before automating them (15%). This is likely due to those processes being run or managed in a haphazard way and are in need of either data cleansing or a better understanding of the process before it is ready for automation. Either way, vendors could help by providing tools or support to make this easier.

Companies are often slow or find it difficult to change at a cultural or business level, a challenge that increases as the organisation scales. Organisational change management (13%), engaging stakeholders internally (11%) and building a business case (11%) are the next highest-score challenges for businesses.

These indicate the internal issues that businesses can have with winning support and implementing RPA. To meet this challenge, a toolkit or program that encourages the setting up of a centre of excellence to build successful RPA projects that demonstrate their value is essential.

Finding the right implementation partner (10%) and training staff (9%) are also considerable issues worth mentioning when it comes to selecting RPA tools. Here, vendors need to demonstrate their credentials with case studies and whitepapers that are relevant to a prospect while the potential client needs to be honest about its need and capabilities, and not expect miracles. It's all about creating a partnership with the right people to deliver the job from both sides to help meet any knowledge gaps.



#### 3.1 Most Popular Tasks

During the course of the research, some common themes emerged in regards to how the respondents use RPA, highlighting strong characteristics of the technology in delivering results in key business areas. The most popular use case is data entry & processing (19%) highlighting the clerical nature of many RPA tasks.

With the drive to produce greater analytics across many businesses, data cleansing and autogeneration of reports (both 12%) highlight the need to gain more value from data and to provide actionable insights for business leaders to help improve efficiency or make key decisions.

A variety of tasks, including onboarding new staff (7.9%), highlights the increasing use of RPA

in HR and a growing number of departments to help speed up these processes. Compliance checks (7.6%), accounts payable (7.3%) and payroll processing (7%) highlight the traditional strengths of automating accounting processes with RPA.

At the lower end of the responses, newer use cases on the rise include appointment booking (5.8%) and customer onboarding (5%) as businesses extend the use RPA to customer-facing roles. Another example, and one that may align with chatbots and virtual assistants, is responding to customer complaints (3.5%), which is likely to grow fast as automated customer services grow in popularity, both with businesses and customers not wishing to be kept on hold.





#### 3.2 Tasks by Industry

As highlighted in Section 1.2, Manufacturing leads the field in RPA adoption, using it to automate data entry and processing (20%), followed by generating reports (12%), data cleansing (11%), payroll processing (9%) and accounts payable (8%). Other notable users of RPA include Local Government for data entry and processing (21%) and data cleansing (12%). As a primary adopter of RPA, IT also uses RPA for data entry and processing (21%).

#### 3.3 Tasks by Company Size

With large, incumbent systems, it's no surprise that 21% of the larger-sized businesses and enterprises are using RPA to speed up data entry and processing, with the auto-generation of reports (13%), data cleansing (11%) and onboarding new staff (8%) leading the way in a similar manner to section 3.2.

**21%** of the larger-sized businesses and enterprises are using RPA to speed up data entry and processing

#### 3.4 Team/Department use of RPA

According to our survey, 25% of the professionals involved in deploying RPA were in IT. As with many technologies that filter into the organization, IT often want to have involvement and control to ensure security. Since the value of RPA appeals largely to operations-focused businesses, the Department/ Operations Management segment sees the secondhighest level of use at 17%. Following the path of business interest, Key Managers and Team Leaders are third at 13%, with Project Management just behind at 12%, indicating a clear chain of succession or interest, where these teams perhaps see RPA successfully used in IT and then take on their own initiatives.

Finance (10%) and HR (8%) are also embracing the benefits of RPA, albeit at a slower pace in comparison with some forecasts predicting this will change significantly in coming years.





#### Overall, the current landscape sees RPA as a flexible tool to address the needs of the business.

Increasingly, this perception is extending beyond the obvious benefits of cost saving and process improvement, to encompass wider cultural change as more stakeholders and departments adapt to the new digital workforce at their disposal.

The future is bright for RPA, as cognitive automation begins to improve the technology further. The use of analytics data alongside automation can provide deep situational awareness across the business.

This will see RPA begin to tackle not only the simple repetitive tasks it already handles so well, but soon move to complex, high value work. Human/bot teamwork across the workforce is imminent.



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### **About Automation Anywhere**

Automation Anywhere is the leader in Robotic Process Automation (RPA), the platform on which more organizations build world-class Intelligent Digital Workforces. Automation Anywhere's enterprise-grade platform uses software bots that work side by side with people to do much of the repetitive work in many industries. It combines sophisticated RPA, cognitive and embedded analytic technologies. More than 2,800 customer entities and 1,600 enterprise brands use this Alenabled solution to manage and scale business processes faster, with near-zero error rates, while dramatically reducing operational costs. Automation Anywhere provides automation technology to leading financial services, insurance, healthcare, technology, manufacturing, telecom and logistics companies globally.

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