

# Intelligent Automation Buyer Guide

We Help Organizations  
Scale Good Ideas



# The PIF Point of View

Organizations with automation, process, and critical insights working in harmony scale significantly better.

# Target State for Intelligent Automation

*“Automation solutions need to orchestrate both internally to the process being automated and externally across operational systems.”*

# Current Automation Limits

Modern automation solutions have revealed hard limits of current offerings:

1. RPA can't orchestrate effectively across departmental processes
2. Integration technologies are constrained to api based approaches
3. AI capabilities are localized at best and don't incorporate enterprise data to drive meaningful outcomes
4. Performance KPI's not relevant and not aligned with business drivers
5. Event based insights to trigger cross platform outcomes aren't possible



# Key drivers for Intelligent Automation (IA) today:



1. AI Everywhere - AI embedded into technology, process and insights
2. Automation quest - maximizing efficiencies and opportunity
3. Digital business first - competitiveness and scale
4. Best of breed service optimization - transforming operating models
5. Shifting regulatory environments - risk management and geopolitical fragmentation
6. Dynamic ways of working - new work modalities

# For Today - Intelligent Automation is Defined as ...

A seamless way to combine diverse technologies to improve business outcomes.

With 5 key capabilities:

1. End-to-end process automation
2. Seamless orchestration across automation technologies
3. AI-powered insight driven automation
4. Democratization of automation
5. Value-driven automation planning and business observability



# 4 Classes of Automation

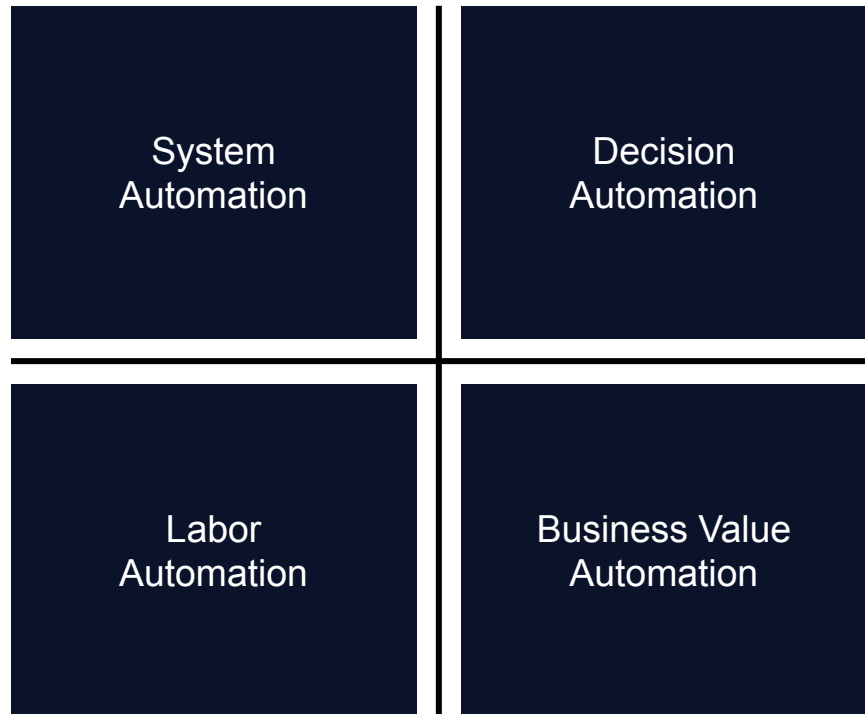
For categorization consider the following definitions of automation.

**System automation:** technologies that connect and orchestrate using integration technologies.

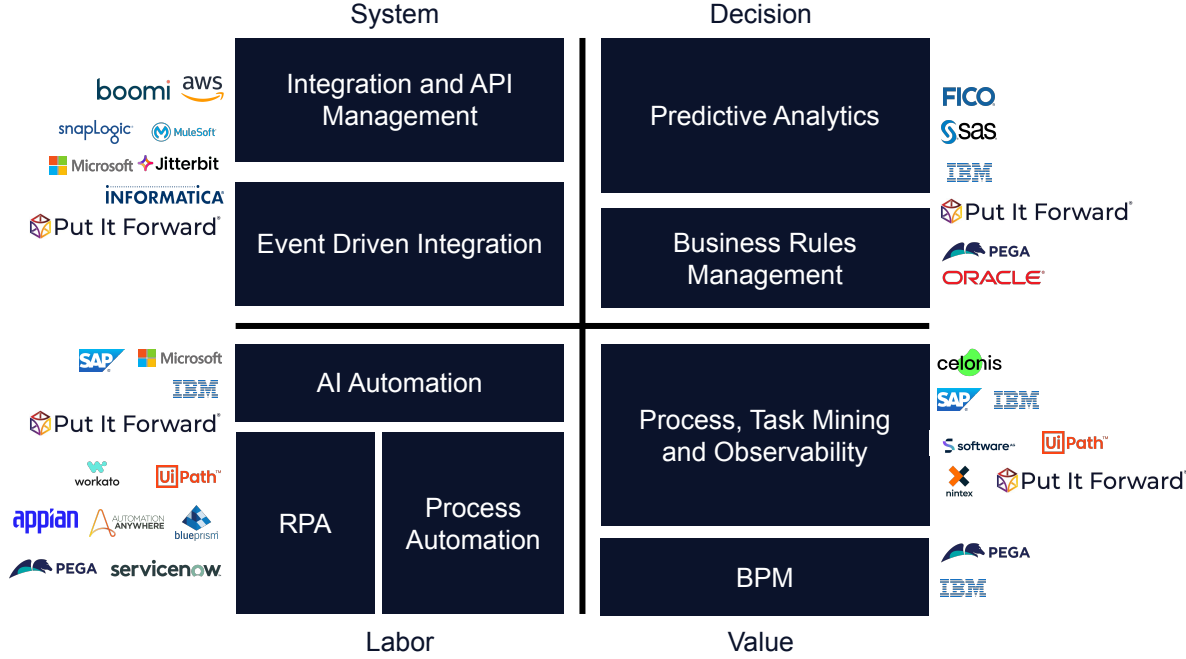
**Labor automation:** technologies that replace and augment manual tasks and coordinate work

**Decision-centric automation:** business rules management and predictive analytics

**Business value automation:** capabilities that enable views into what is happening



# Automation Sub-categories and Solutions



The solution list is meant to provide an orientation of solutions and is not exhaustive nor differentiates between cloud and non-cloud offerings.

# Single Solution Chooser

Select when the need is data or event driven and between systems not requiring end user interaction.

Eg. one way connections between A and B

System Automation

Decision Automation

Select when the need is to design processes or to identify valuable insights within a process that trigger outcomes.

Eg. Next best customer

Select when the need is for localized process automation within an a single solution.

Eg. customer setup process within an ERP or CRM

Labor Automation

Business Value Automation

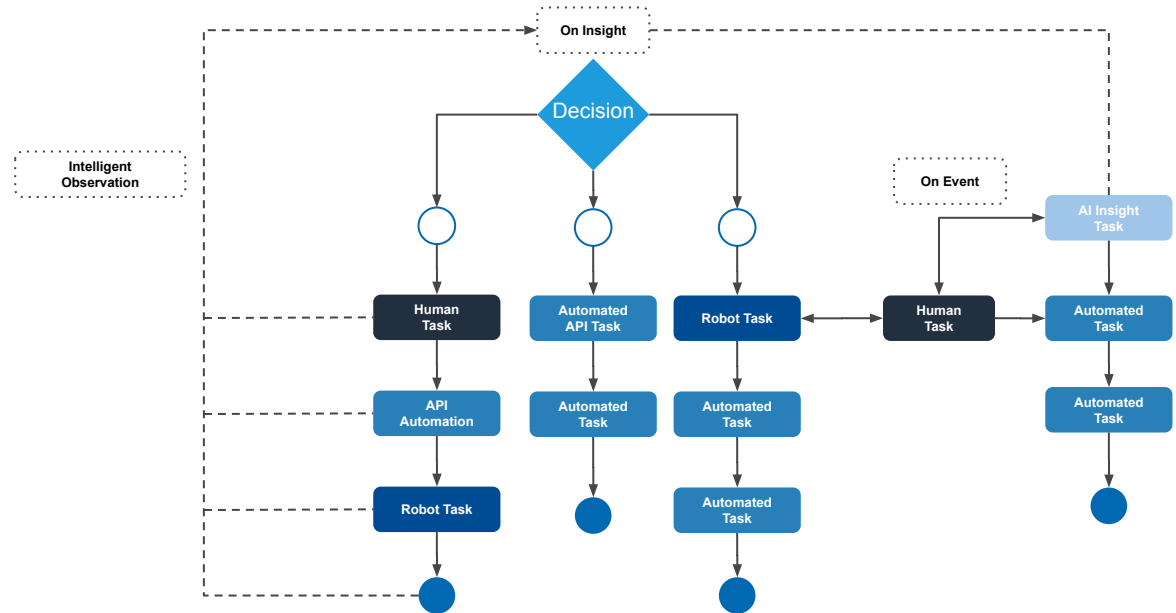
Select when the need is to understand how well a process is running and to design a process.

Eg. Creative asset management

# Cross Automation Design Pattern

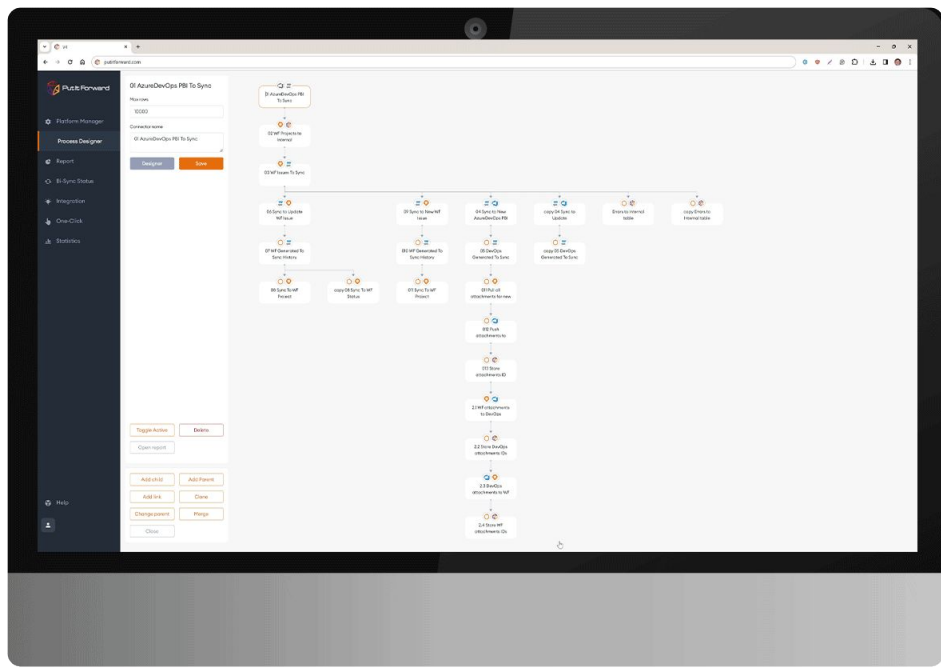
Customers want end-to-end automation not individual automation technologies

Automation and human in-the-loop need to operate seamlessly with each other to improve quality and systematically drive out costs



# Cross Automation System Example

- Automation platforms need to enable orchestration that operate internally and externally across platforms.
- AI-powered automation provides continuous decision-making support by predicting events and notifying stakeholders in a unified approach to closed-loop automation.

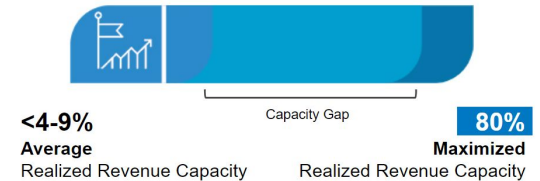


Eg. shows cross orchestration and automation with localized UiPath, Azure Dev Ops and Adobe Workfront operational solutions

# Value Driven Automation - Creating Essential KPI's

- Outcomes drive investment into automation projects
- 71% of organizations say that it is critical to tie business value to automation projects while 43% struggle to build metrics to demonstrate success\*
- Historically automation projects have focused on manual task automation without a clear understanding of ROI in technology led projects
- KPI's representing the impact of automation and the capacity it creates are essential for operational governance
- These KPI's need to be tied directly to financial performance, aligned with business KPI's

## Identified and Closed Revenue



\* Sample from PIF revenue automation KPI's

**Pro tip:** one and done automation projects fail most ROI tests over time because the value is immediately consumed.

# 5 Common Automation Myths

- 1. Automation will just work: no code = no planning and no skills needed**  
Reality: Advanced planning is critical for project success and continuous operations requiring technical skills.
- 2. Middleware teams can build it**  
Reality: Middleware is appropriate for system integration - it is a node in an orchestration or automation process for localized events and must be updated as change occurs.
- 3. Vendor connectors do everything that's needed**  
Reality: Pre-built connectors serve a limited number of point to point use cases with very limited flexibility.
- 4. The best-of-breed application can be the everything hub**  
Reality: Applications offer best-of-breed functional execution and at most offer a localized process control.
- 5. Predictive analytics and insights can be handled by the data warehouse**  
Reality: Data warehouses can provide after the fact analysis but cannot provide in the moment insights and trigger events or processes.



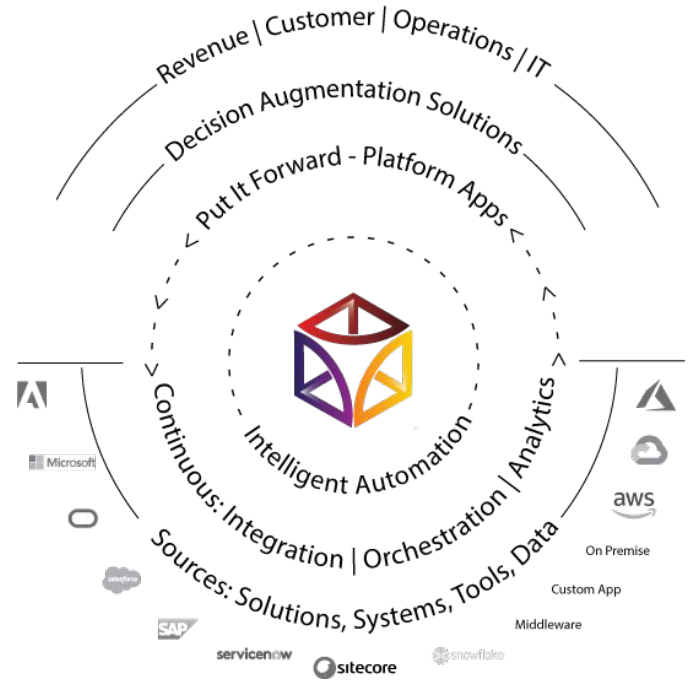
# Buyer Advice

1. Prioritize platforms that can orchestrate multiple automation and AI technologies into a complete solution.
2. Leverage AI to do the deep mining for insights needed to make automation smarter and more adaptive over time.
3. Have clear measurement of business value from automation and be able to track over time.
4. Seek vendors that have an open architecture and interoperate with other solutions.
5. Find and leverage organizations that have critical skills such as automation planning, metrics development and team embedding raising the capabilities of your enterprise.



# PIF Unlocks Intelligent Automation Value With:

- ✓ Seamless orchestration across data silos, system and labor automation tech, api's and data services
- ✓ AI driven insights which trigger events, processes and outcomes
- ✓ Value based KPI's embedded into the platform for best practice operations
- ✓ End-user focused automation value based solutions



# IDC Says PIF - Next Generation IA Platform

A seamless way to combine diverse technologies to improve business outcomes.

With 5 key capabilities:

1. End-to-end process automation
2. Seamless orchestration across automation technologies
3. AI-powered insight driven automation
4. Democratization of automation
5. Value-driven automation planning and business observability



Next Generation Business  
Automation Platforms: IDC Analysis  
<https://www.idc.com/getdoc.jsp?containerId=US50251823>

# Other Resources

## Next Generation Business Automation Platforms: IDC Analysis

<https://www.idc.com/getdoc.jsp?containerId=US50251823>

## Intelligent Automation Focusing on Real-Time Insights Drives Competitive Advantage: IDC Analysis on Put It Forward

<https://www.putitforward.com/idc-report-technology-spotlight-intelligent-automation-pdf>

## Case Studies

<https://www.putitforward.com/resources/resource-library/case-studies>

# Next Level Experiences

We Help Organizations  
Scale Good Ideas

