

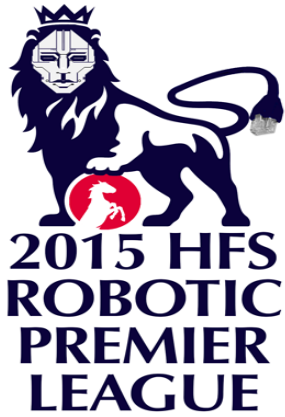


# Where is the Action Today in Intelligent Automation?

September 17, 2015

**Barbra Sheridan McGann**  
EVP, Business Operations  
Research  
[barbra.mcgann@hfsresearch.com](mailto:barbra.mcgann@hfsresearch.com)

# HfS Research has been writing about RPA for 3+ Years



**HfS** Framing of Constitution for Robotism 1

## FRAMING A CONSTITUTION FOR ROBOTISTAN

Racing with the Machine of Robotic Automation

**Author:**  
Charles Sutherland, SVP BPO Strategy, HfS Research  
October 2013

### Executive Summary

A year ago, HfS Research published a report, "Robotic automation emerges as a threat to traditional service centers." We examined whether ethics, rules-to-develop software robots would eventually supplant many efficient FTEs. We concluded that robotic automation, or "robotism" as we described it in a subsequent article, had the potential to be highly disruptive and to be a transformative technology for teams and BPO service providers that would lead to new winners.

A year later, we are even more convinced that robotic automation has the potential to change the BPO marketplace. To build on the insights from a year ago, we have spoken with key software vendors, systems, operations consultants, and major BPO service providers to understand their experience with and plans for robot automation. From those discussions, we have a strong feeling that the market for this technology and other forms of process automation is coming on strong and that the transformative impact of those technologies could be even greater than we anticipated a year ago. "Tony" now test shapes the way that we think as well as what we think about." That insight holds true for robotic automation, which could radically reshape the BPO marketplace in the next 12-18 months.

We focused on how robotic automation is changing and could further change the way that key functional processes such as Finance & Accounting, Human Resources, Procurement, Supply Chain, Customer Experience Management, and Legal Services are built, structured, and delivered over the next several years. We realized that our previous thinking about the emergence of this technology in business processes had been constrained. A year ago, we had very specific ideas about when robotic automation would be released and when it would not, generally, that meant the greatest relevance was in low-end, rule-based tasks. We have discovered since then that robotic automation has the potential for much wider application, and we may need to fundamentally change our thinking about rule-based processes, what roles can be brought into Robotistan, and the relationship between labor and labor-saving technology.

Source: "How Far Have Your Technology & Changing Our Mind for the Better - Our Thoughts - The Robotism Race Now Next, 2013"

Architects of Global Business

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**Point of View** The Lack of Ethics in Enterprise AI and Automation 1

## THE LACK OF ETHICS IN ENTERPRISE AI AND INTELLIGENT AUTOMATION

**Author:**  
Tom Sawyer, Managing Director, HfS Research  
Phil Davis, Research and COO, HfS Research  
July 2015

A call of luminaries ranging from Stephen Hawking and Elon Musk to the signatories of Artificial Intelligence (AI) at Facebook and Google, Tom LaFay and Dennis Hassold, have signed a petition warning of a "military artificial intelligence arms race" and calling for a ban on "offensive autonomous weapons." Among the developer community, the discussion on the ethics and limitations of AI has been in vogue as it has been for "turing, let in the discussion around the rollout of RPA and process automation. Discussions of ethics and the impact on the future of work are equally heated. One can speculate as to HfS, as an industry veteran, if that more enterprise clients are showing an increasing willingness to invest in technology based (rather than people based) solutions.

You may have read our [Value Beyond Cost Study](#), which we ran with PwC earlier this year. In it, we asked 168 senior executives about the priorities of their CIOs as well as their operations (see ENR 11).

Thinking in the As-a-Service Economy

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**Point of View** Insights from Early BPO Adopters of Robotic Process Automation 1

## INSIGHTS FROM EARLY BPO ADOPTERS OF ROBOTIC PROCESS AUTOMATION

**Author:**  
Charles Sutherland, SVP Research, HfS Research  
Phil Davis, COO, HfS Research  
February 2015

### The Context

As 2015 begins, it seems that almost every conversation about Business Process Outsourcing (BPO) in some form turns to the effect that Robotic Process Automation (RPA) is having – and could have – on service providers, their clients, and the entire ecosystem. RPA software vendors and the enterprise clients that are affected by this technology.

As yet, we have been following the trend to report on the use and how best to use the benefits and opportunities on RPA with service providers, RPA vendors and advisors in the last year alone. However, in most of these conversations we had observed that the primary and change management issues of operations, teams, functional executives and C-suite enterprise buyers of RPA are being largely overlooked. In short, RPA goes more as an offering from the software vendor, service providers and consultants, rather than an edge to get more cost-reducing capability to clients beyond traditional single-stage outsourcing, that demand pull from buyers been to automate their processes and minimize manual tasks but the reality is changing.

### HfS Definition of RPA

HfS Research defines RPA as the use of software to create teams of "virtualized FTEs or robots" to interact with enterprise application software in the same way that today's live person operators in the enterprise or in a BPO service provider interact in order to complete a rules-based business process. RPA software is not a replacement for ERP applications or other systems of automation or systems of support but works with these systems to perform the specific tasks that need to be done in order to complete all or stages of a process. Examples of independent RPA software vendors to BPO and IT include Blue Prism, Automation Anywhere, Blue Prism, UiPath, WorkFusion, and iPaaS. The service providers such as Capgemini, IBM, Infosys, TCS and others also have proprietary RPA software offerings as well.

RPA did not just arrive as a technology in 2014, it has been available for several years, with early adopters generally in enterprise in business processes that had not been automated or it did if outsourcing, what is

Architects of Global Business

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# And Now: “The Raw Truth About Intelligent Automation”

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### The Raw Truth About Intelligent Automation

September 2015 | [Charles Sutherland](#)

The delta between the hype and reality of automation is far too wide. Enterprise service buyers need a major dose of reality to help them sort out what is real today versus what is just positioning and posturing. Furthermore, enterprise buyers need common definitions of automation technologies and how they differ from each other. This has caused the discussion of automation in the IT/BPO market to become much more confusing for process and IT owners in the enterprise than is necessary.



To help clarify this confusion, we have developed the HfS Intelligent Automation Continuum to map out the various technologies. And we have surveyed our base of enterprise service buyers to see what they think the reality of Intelligent Automation (especially RPA and Cognitive Computing) is today. This insight helps us see what's real in today's market versus hype and pure fantasy—or what we are calling the “Raw Truth of Intelligent Automation.”

[Download Now](#) 

### Request a Briefing



[Contact HfS Research to request a briefing today >](#)

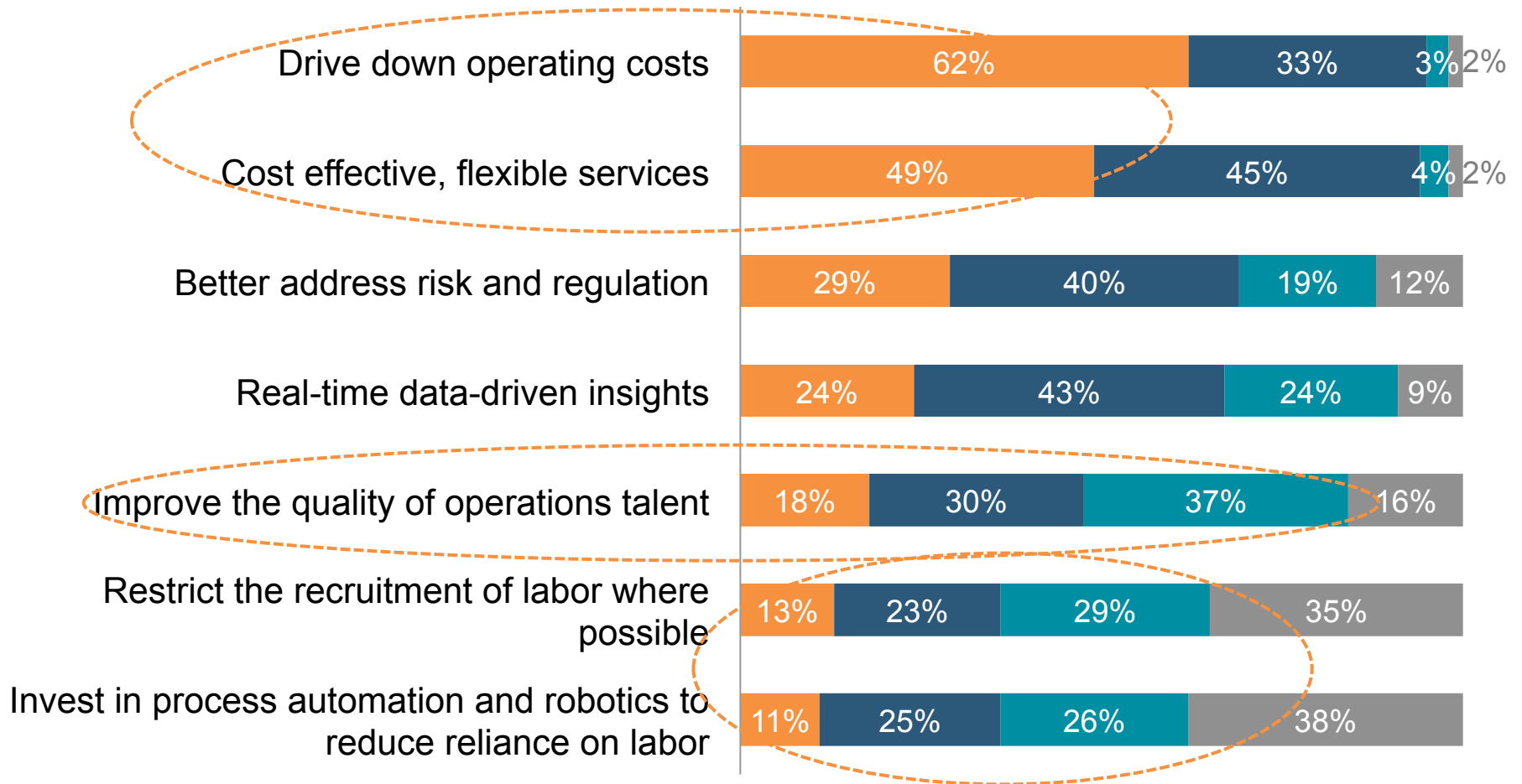
# Today's Discussion

- The next threshold of Value: Sourcing in the Digital Age
- Intelligent Automation
- Rethinking Your Existing Account Base
- RPA Readiness
- Rethinking Talent

# C-Suite Priorities: Less Cost, Better Data, Fewer People

How critical are the following C-Suite priorities/directives with your operating model?

■ Mission Critical    
 ■ Increasingly Important    
 ■ Emerging    
 ■ Not a Directive



Source: HfS Research and KPMG LLP, 2015

Sample: 168 Enterprise Buyer Executives from "Achieving Value Beyond Cost" Study

\*Numbers may not equal 100 percent due to rounding

**“The days of labor-based outsourcing are a melting ice cube”**



# Welcome to the As-a-Service Economy

## The Optimum Operating Model

Outsourcing • Shared Services  
GBS • BPaaS/SaaS/IaaS •  
Crowdsourcing

## Empowering Talent to Make it Possible

Capabilities over Skills • Defining Outcomes • Creativity • Data Science

Tools/Infrastructure

## As-a-Service Economy

*Outcome Focus  
Collaboration  
Agility \* One-to-Many  
Plug-and-Play Services*

Governance

## Technology to Augment Knowledge Labor

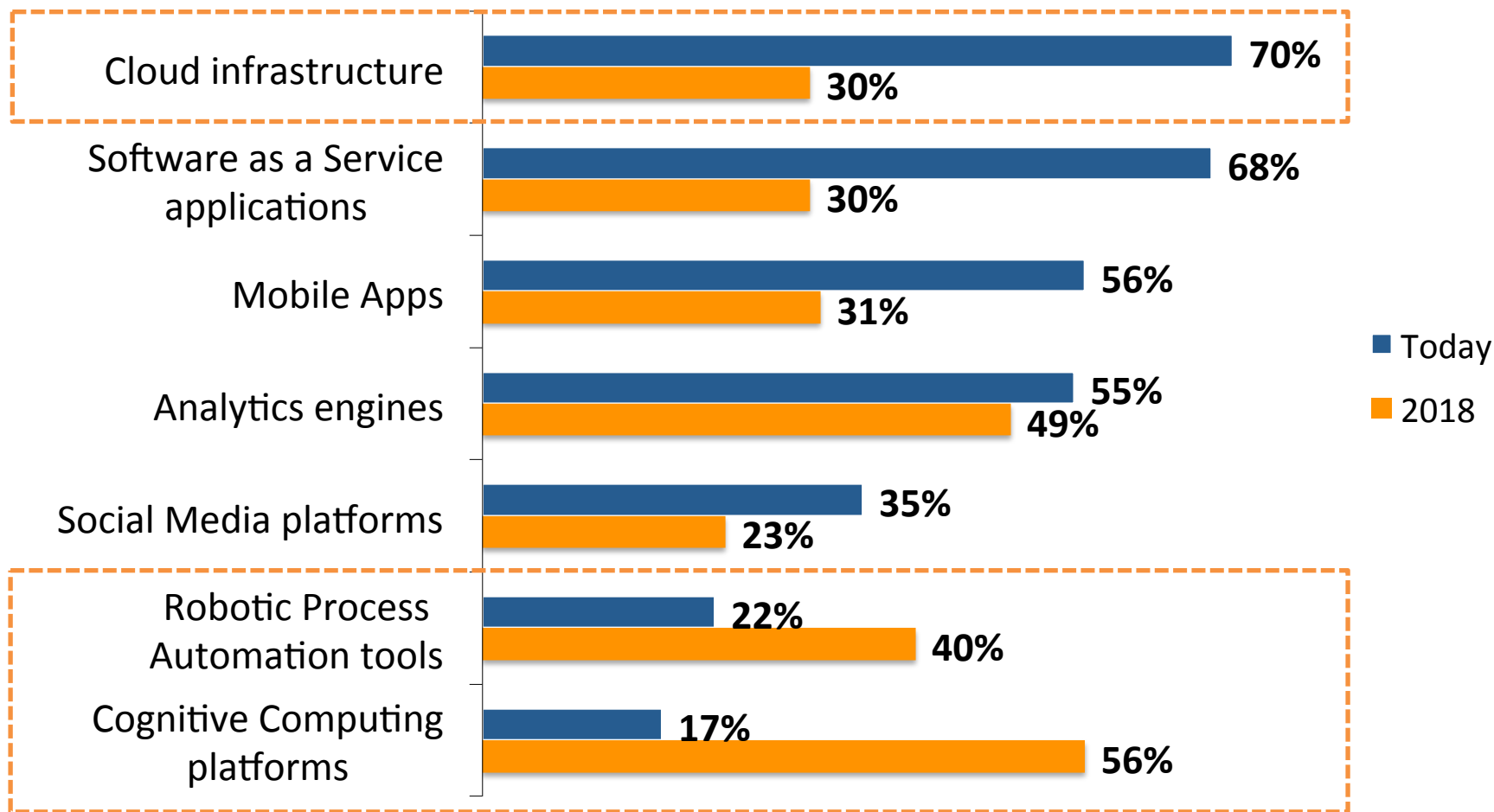
Digitization & Robotic Automation •  
Analytics • Mobility • Social Media •  
Cognitive Computing

## A Burning Platform for Change

Globalization of Labor • High-growth Emerging Markets • Disruptive Business Models • Consumerization

# Of Enabling Technologies: Cloud is today's driving force; RPA and Cognitive are tomorrow's

What are the most significant enabling technologies **TODAY** in your move to the "As-a-Service Economy" and which do you think will be the most significant in **2018**?



Source: "Ideals of As-a-Services" Study, HfS Research 2015

Sample: Total = 716; Enterprise Buyers = 178; Advisors/Consultants = 176; Service Providers = 372





# The Narrative on RPA is Shifting Towards Transformation

The screenshot shows the CIO magazine website interface. At the top, there is a navigation bar with categories like 'White Papers', 'Webcasts', 'Research Centers', 'IT Jobs', 'CIO Executive Council', 'Events', 'Magazine', 'Newsletters', and 'RSS'. Below this is a secondary navigation bar with 'NEWS', 'ANALYSIS', 'BLOGS', 'SLIDESHOWS', 'VIDEOS', and 'HOW TO'. A search bar with 'Google™ Custom Search' is also present. The main content area features the article title 'IT Robots May Mean the End of Offshore Outsourcing' by Stephanie Overby, dated November 16, 2012. The article text discusses robotic automation as a potential 'offshore-outsourcing killer'. Below the text are social media sharing buttons for LinkedIn, Twitter, Google+, YouTube, and Facebook. To the right of the article is a sidebar with a breadcrumb trail 'You are here: Business/Management Topics » Outsourcing » Run' and a section titled 'Most Recent Outsourcing Stories' containing four links. At the bottom of the article is a photo of three white humanoid robots with the text 'Outsourcing Killers?' overlaid. On the right side of the page, there is a large advertisement for ShoreTel, featuring the company logo and the text 'See how a brilliantly simple phone system with integrated UC nets unexpected results.' and a call-to-action button 'Say yes to better UC'.

## IT Robots May Mean the End of Offshore Outsourcing

Robotic automation and autonomic systems—such as those that enable nonengineers to create software or intelligently manage IT infrastructure—could be an offshore-outsourcing killer.

By Stephanie Overby  
Fri, November 16, 2012

9 Comments

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Most Recent Outsourcing Stories

- Infsys Says its Use of B-1 Visas Was for Legitimate Purposes
- Lukewarm Global IT Outsourcing Market Heats Up in Third Quarter
- Infsys Prepares U.S. Settlement Over Visa Use, as it Faces New Class Action Suit
- 6 IT Outsourcing Lessons Learned From Healthcare.gov's Troubled Launch

**Outsourcing Killers?**

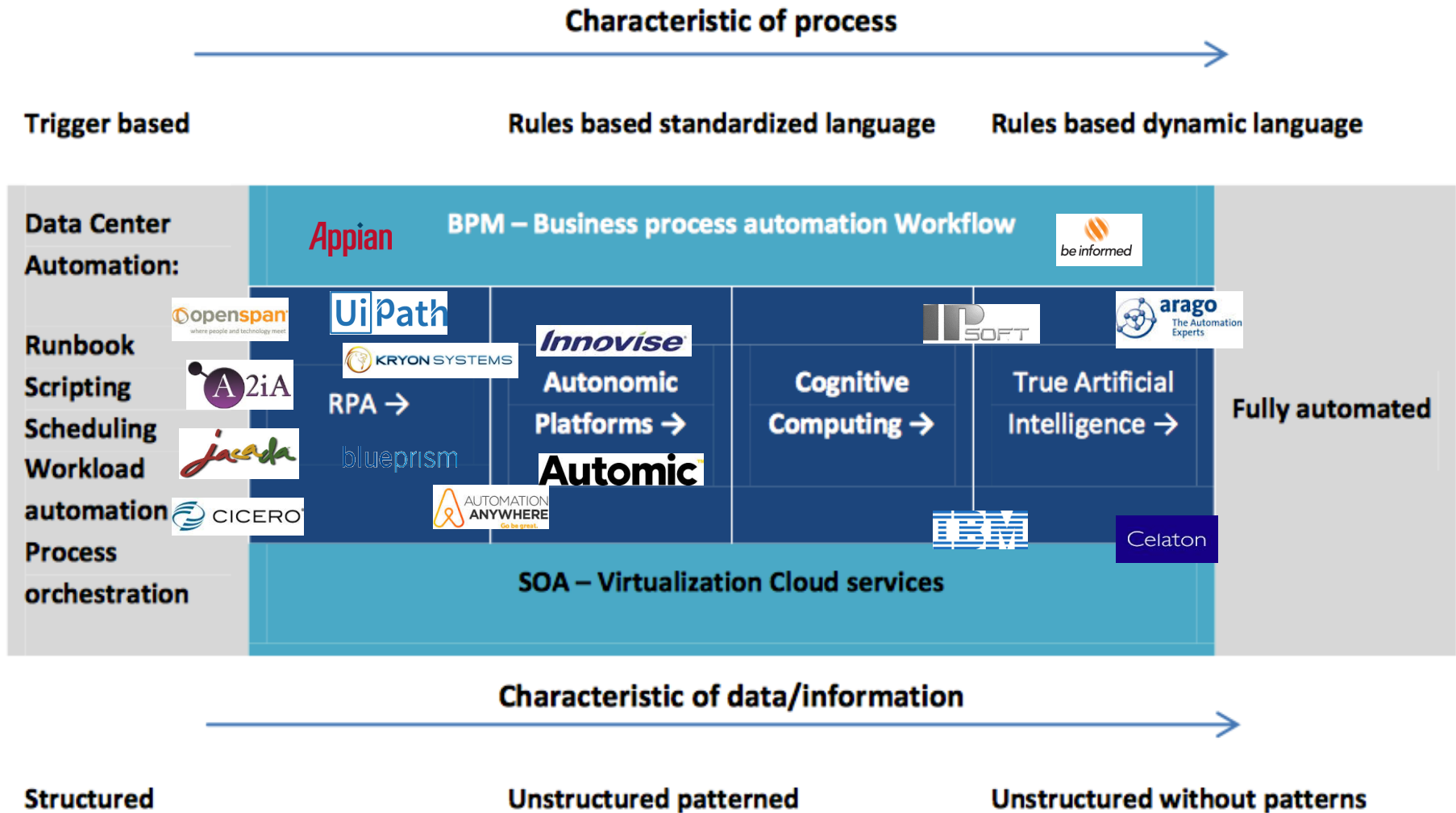
**ShoreTel®**

See how a brilliantly simple phone system with integrated UC nets unexpected results.

Say yes to better UC

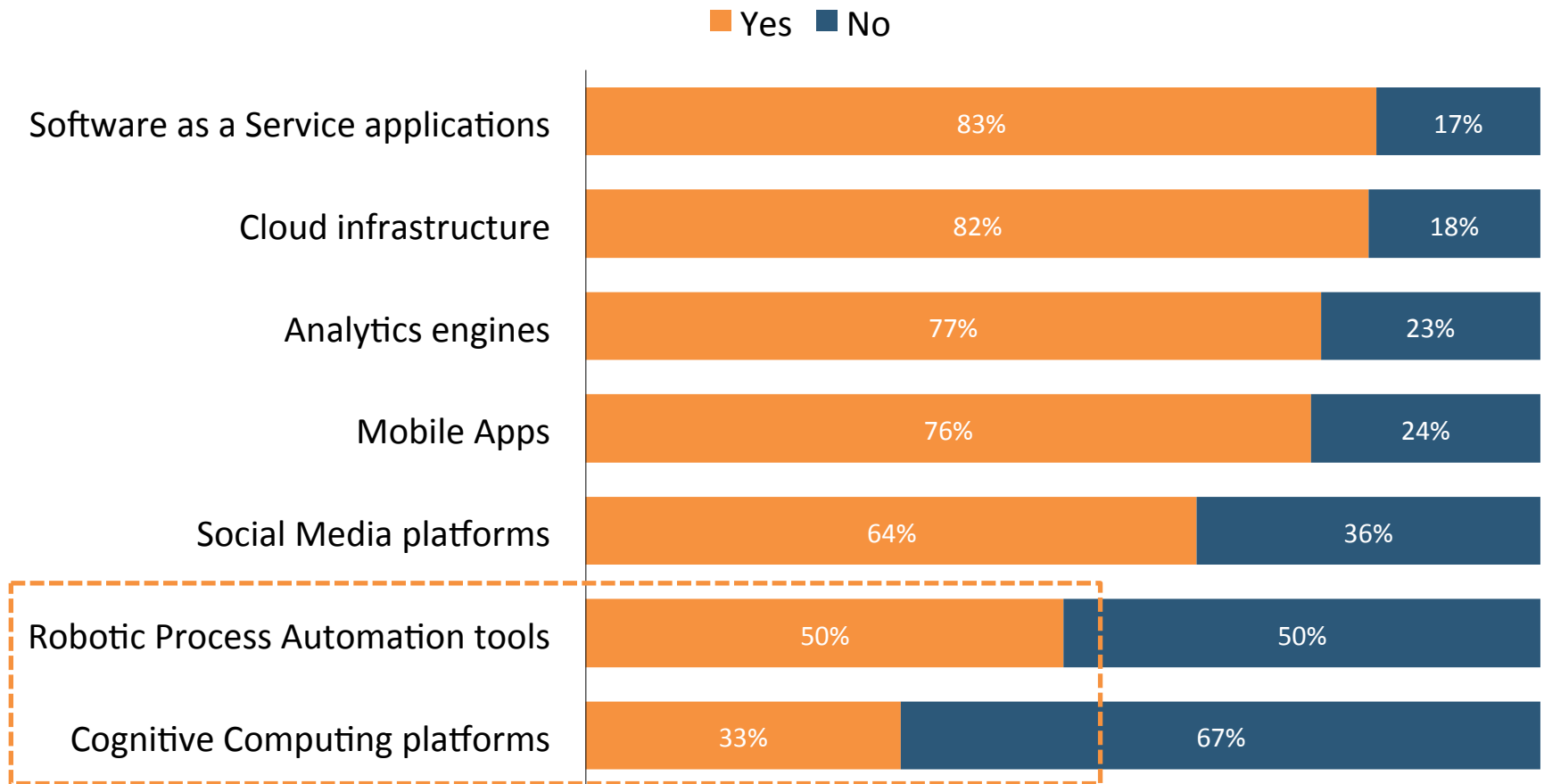
# RPA is just One Part of Something Bigger

## HfS Intelligent Automation Continuum



# Justified Hype? Major lack of understanding of RPA and Cognitive

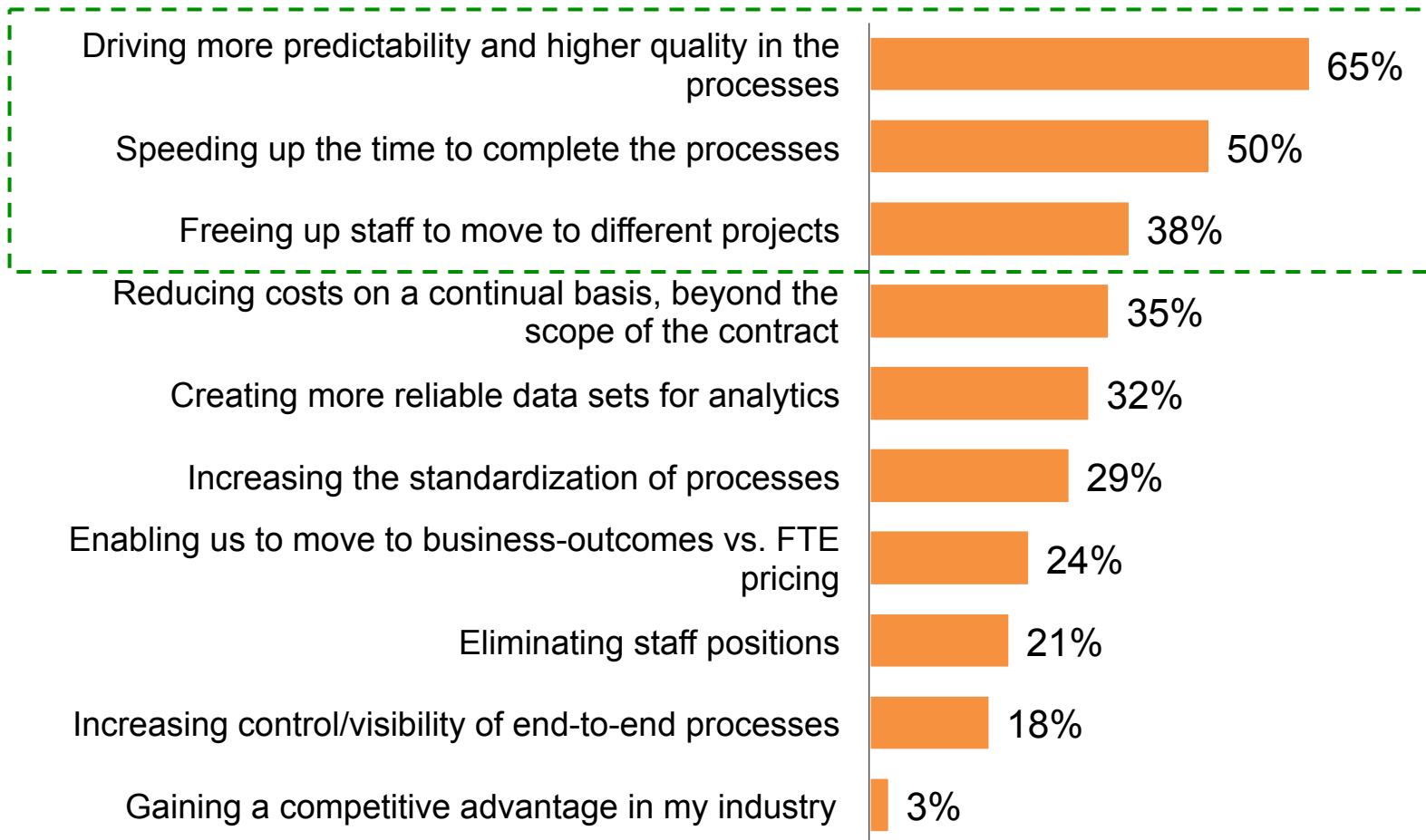
- Do you fully understand the value propositions for the following enabling technologies for your enterprise?



Source: "Ideals of As-a-Services" Study, HfS Research 2015  
Sample: Enterprise Service Buyers = 178

# RPA About Quality, Predictability & Speed

What do you believe to be the most important components of the value proposition for Robotic Process Automation? (Choose top 3)

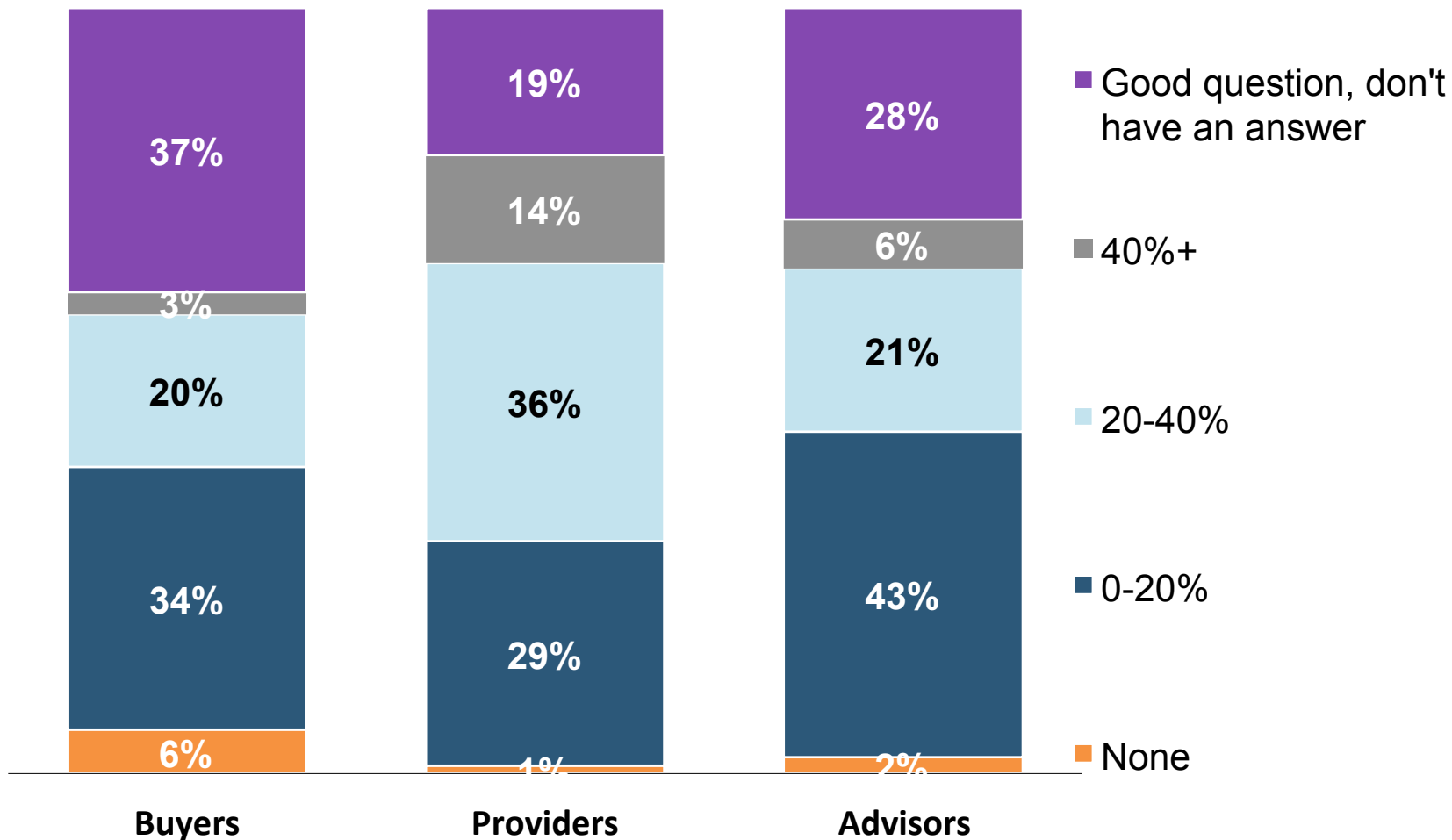


Source: "Ideals of As-a-Services" Study, HfS Research 2015

Sample: Total = 716; Enterprise Buyers = 178; Advisors/Consultants = 176; Service Providers = 372

# No Standard View of Cost Take Out

What percent of your total process cost today do you expect to remove with RPA, all else holding constant?

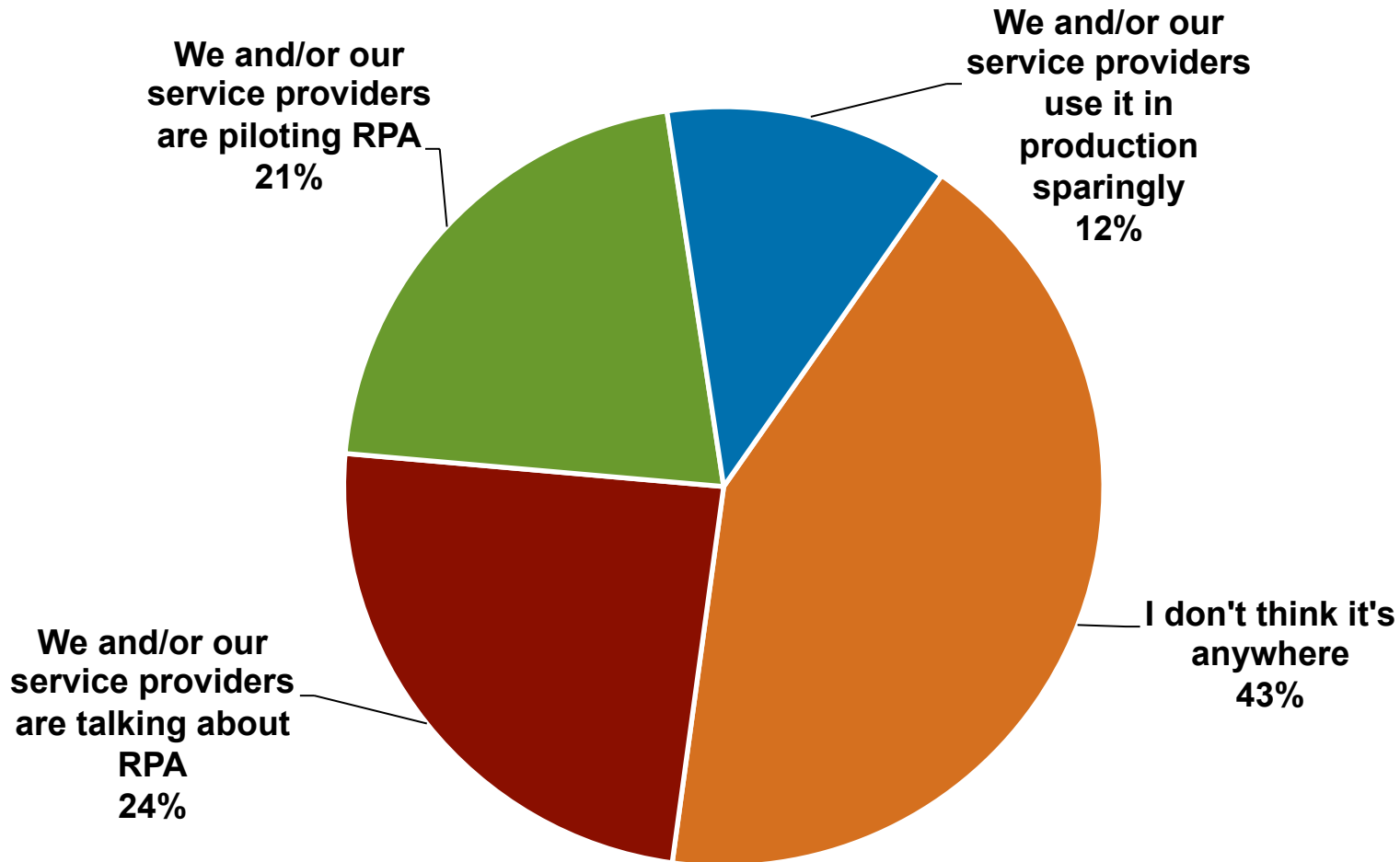


Source: "Ideals of As-a-Services" Study, HfS Research 2015

Sample: Total = 716; Enterprise Buyers = 178; Advisors/Consultants = 176; Service Providers = 372

# RPA is not pervasive in the enterprise

How pervasive is the adoption of robotic process automation in your enterprise today?

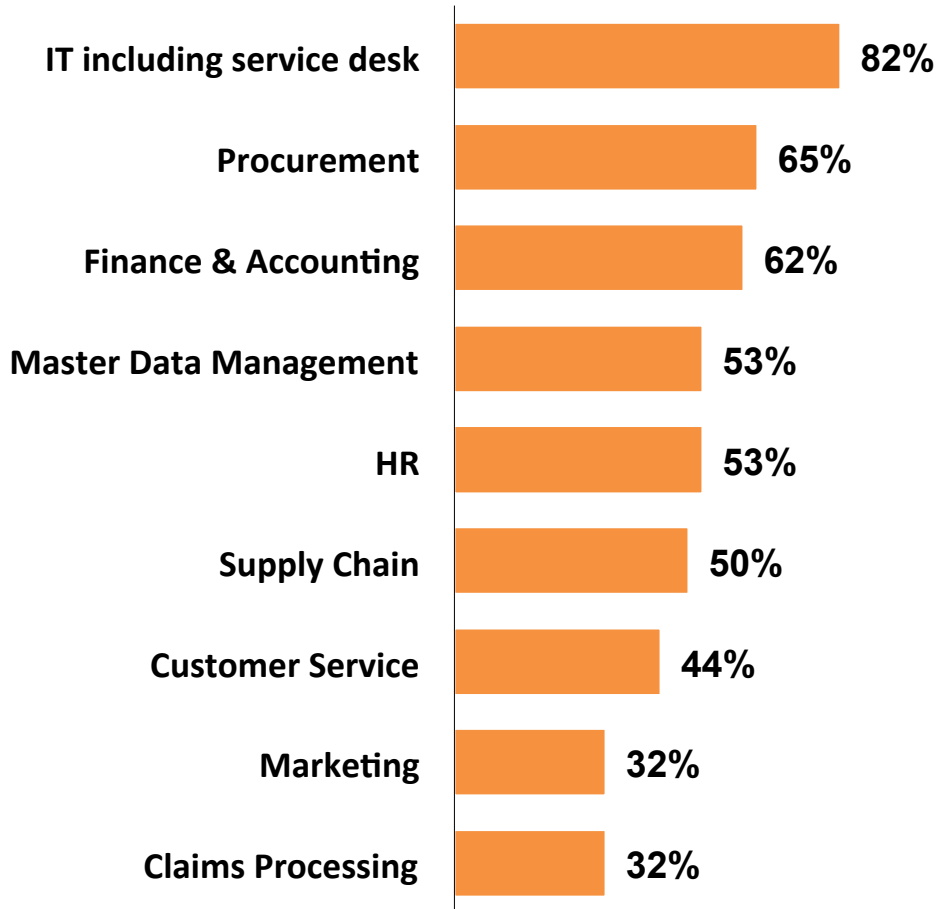


Source: "Ideals of As-a-Services" Study, HfS Research 2015  
Sample: Total = 716; Enterprise Buyers = 178; Advisors/Consultants = 176; Service Providers = 372

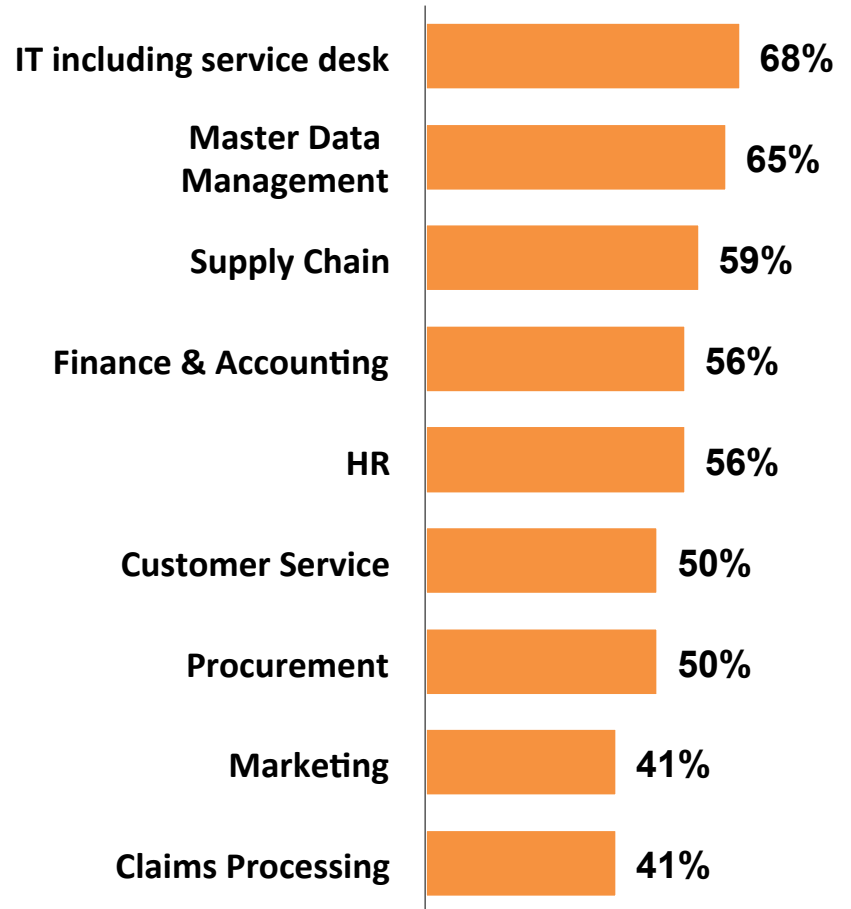
# RPA Seen as Most Applicable Today in IT

Where do you believe robotic process automation to be applicable? *(Choose as many as applicable)*

## TODAY

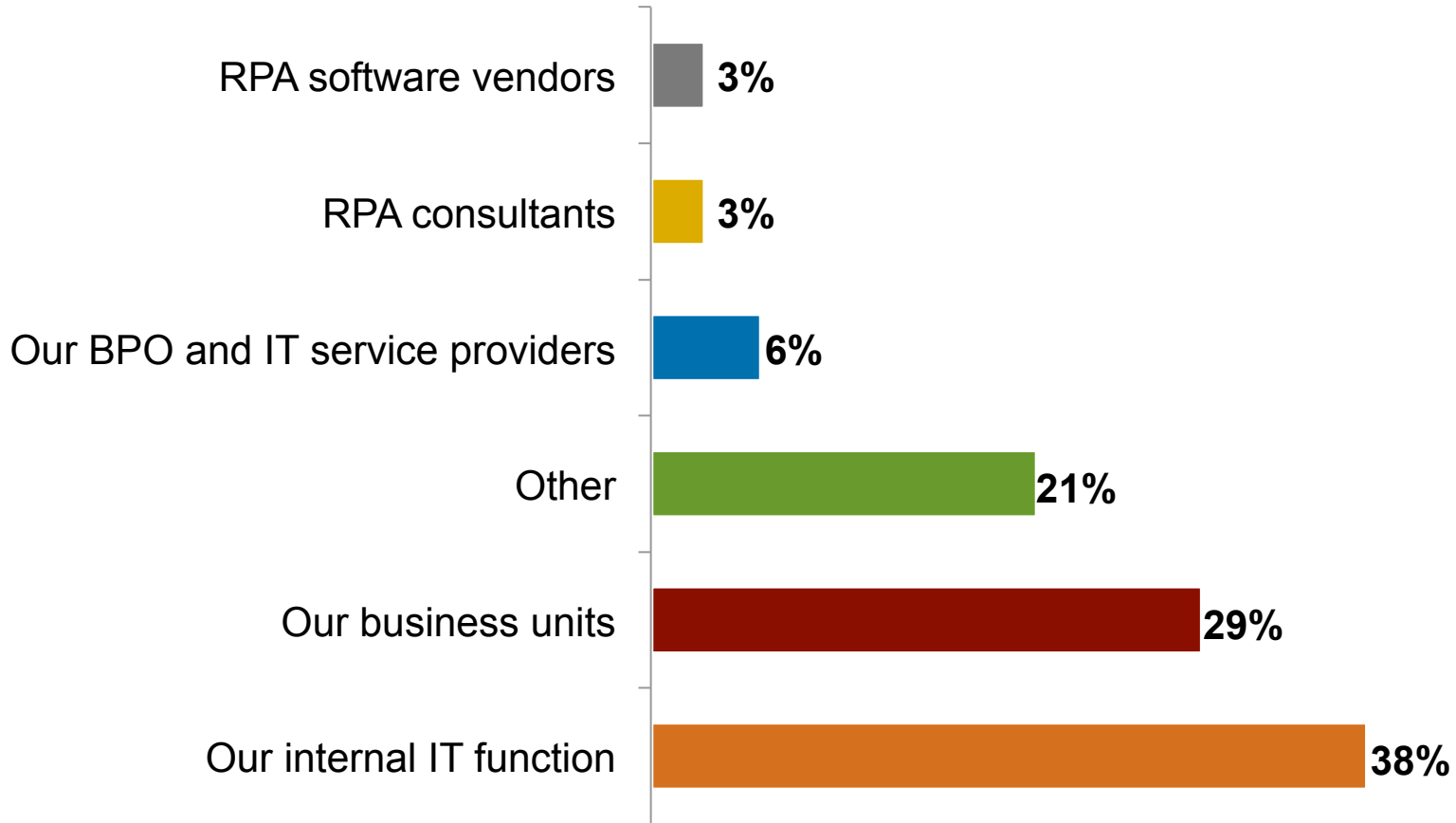


## In 2 Years



# RPA Starting Up in Business Units and IT

Who has led the definition of where and how RPA gets deployed in your processes?



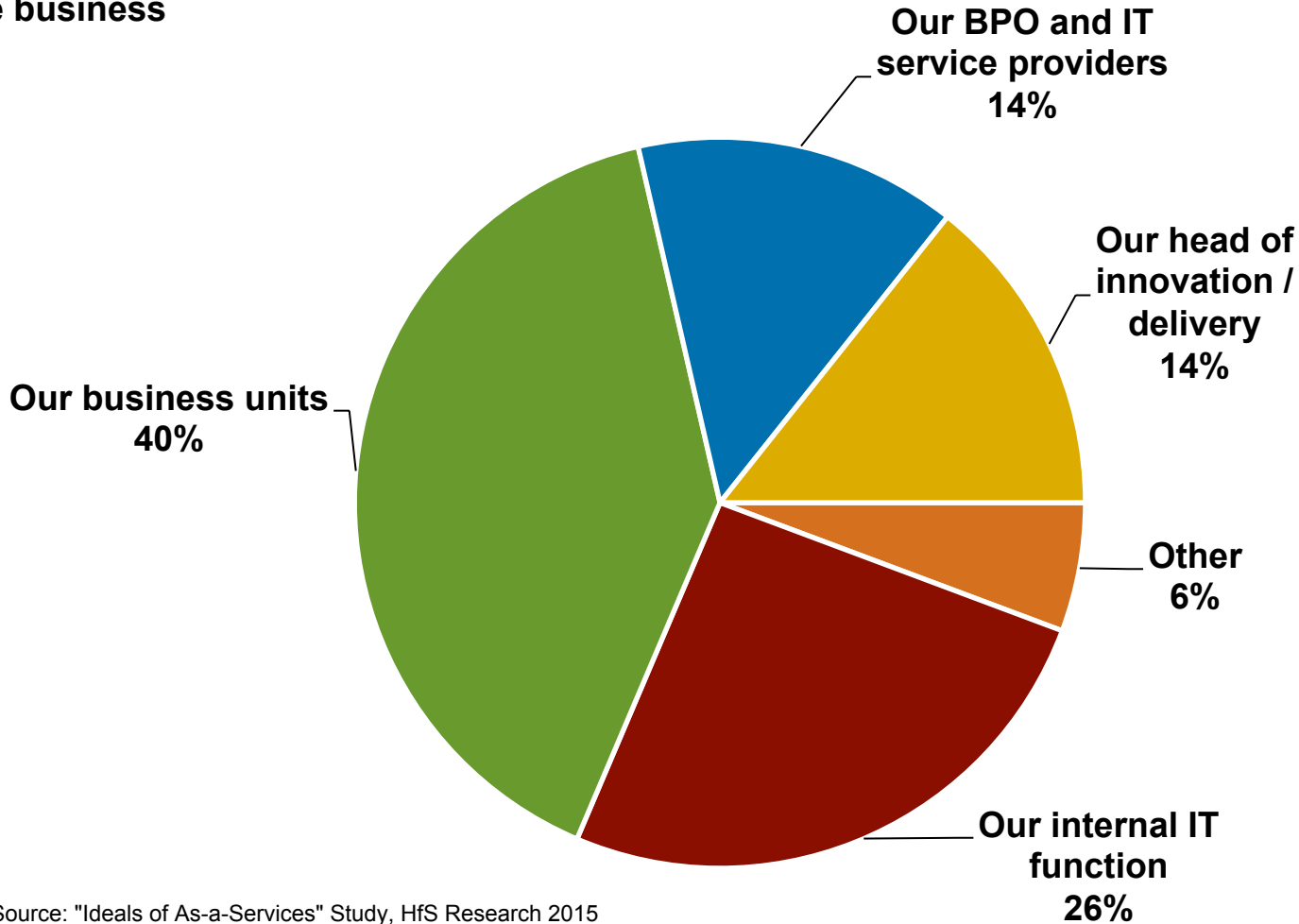
Source: "Ideals of As-a-Services" Study, HfS Research 2015  
Sample: Total = 716; Enterprise Buyers = 178; Advisors/Consultants = 176; Service Providers = 372



# The Business Units are Seen as the Long-Term Champions

Who do you see as primarily responsible for championing your RPA environment over time?

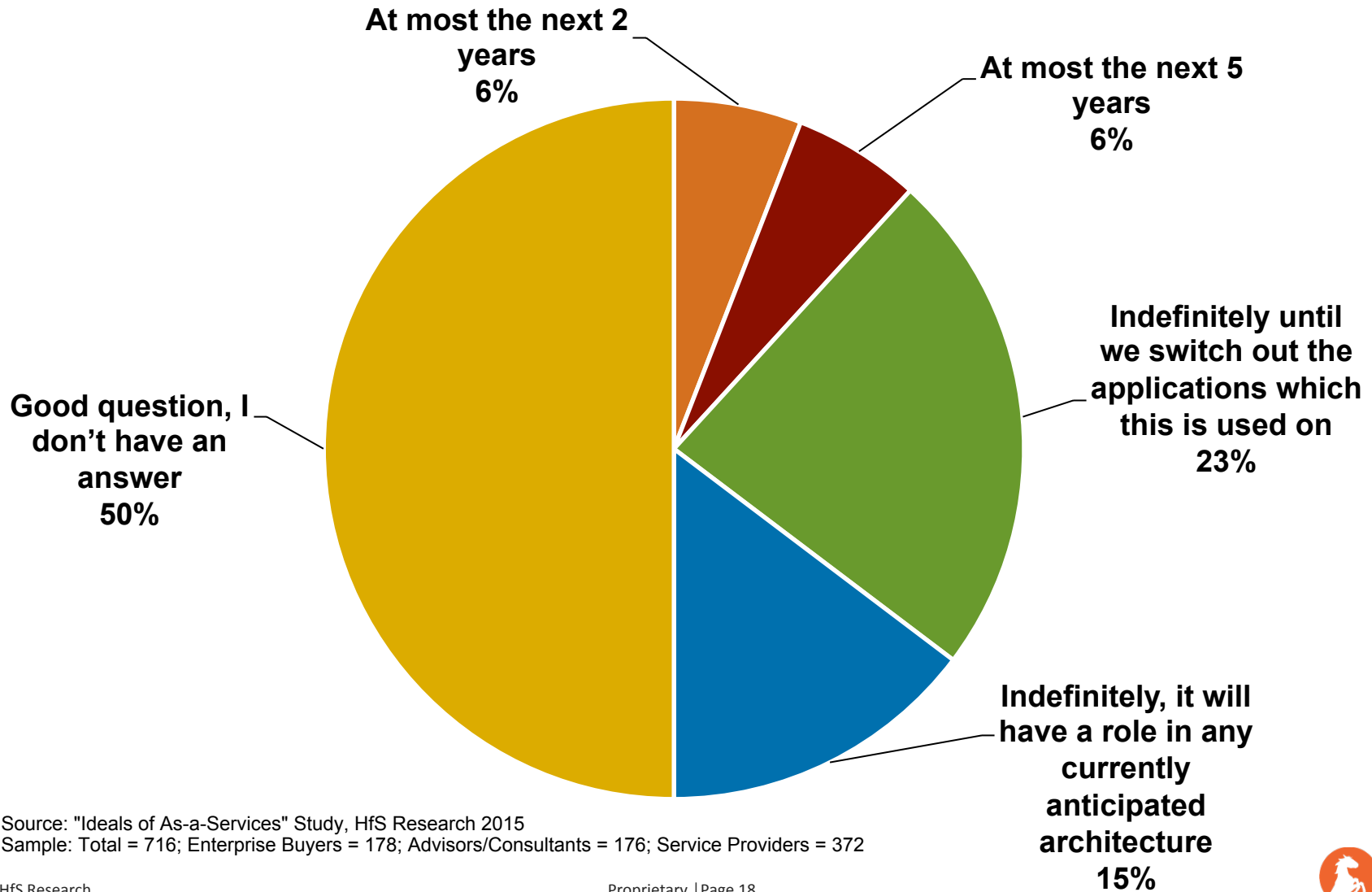
Roles are emerging in IT to interface to the business



Source: "Ideals of As-a-Services" Study, HfS Research 2015  
Sample: Total = 716; Enterprise Buyers = 178; Advisors/Consultants = 176; Service Providers = 372

# It's Not Clear What the Plan is for RPA Over Time

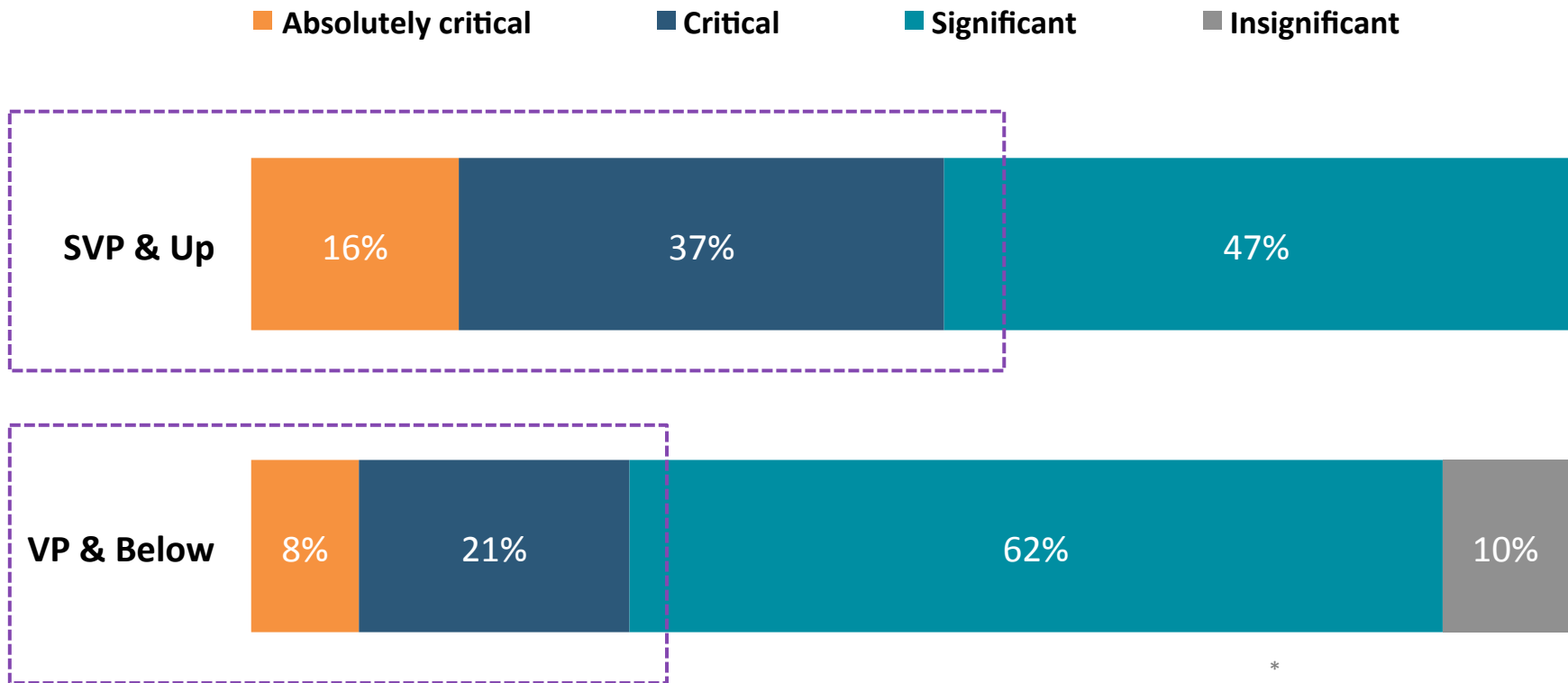
What is the life expectancy you have for RPA in your enterprise?



Source: "Ideals of As-a-Services" Study, HfS Research 2015  
Sample: Total = 716; Enterprise Buyers = 178; Advisors/Consultants = 176; Service Providers = 372

# Leadership has the desire to change, not the operational layer

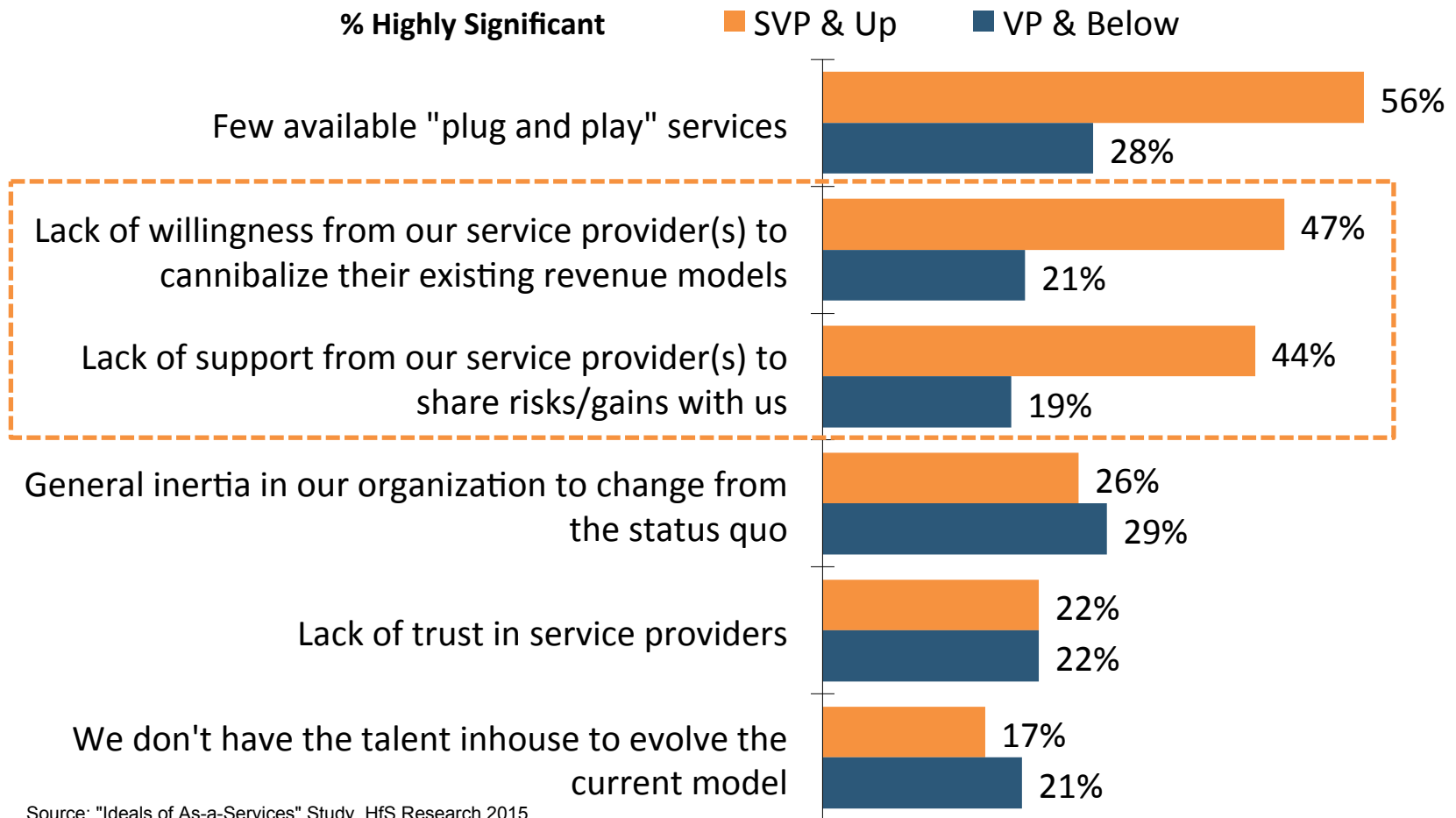
How significant do you see the “As-a-Service Economy” for your organization?



Source: "Ideals of As-a-Services" Study, HfS Research 2015  
Sample: Enterprise Service Buyers = 178  
Numbers may not equal 100 percent due to rounding

# Can today's Service Providers adapt to the evolving model?

How significant are the following obstacles holding back your enterprise's move to the "As-a-Service Economy"?



Source: "Ideals of As-a-Services" Study, HfS Research 2015  
Sample: Enterprise Service Buyers = 178

## 9 Principles for Putting Intelligent Automation to Work

- 1) Define outcomes first
- 2) Start small, start stable
- 3) Bring IT into the project sooner rather than later
- 4) Recognize that this is a transformation effort
- 5) Communicate broadly, address labor concerns head on
- 6) Evaluate capability – it's a different set of skills
- 7) Create a testing environment
- 8) Plan for new governance models
- 9) Create a long-term vision for Intelligent Automation that covers talent and technology

# A Few (Free) Thought Provoking and Informative Pieces on Automation

## HfS Research:

- [Autonomics Advances the Conversation Beyond RPA](#)
- [The Lack of Ethics in Enterprise AI and Intelligent Automation](#)
- [From RPA TO AI: The HfS Intelligent Automation Continuum](#)
- [Five Ways Automation and AI Are Enabling As-a-Service Delivery](#)
- [The Cost of Automation](#)
- [Deconstructing The Rapidly Maturing RPA Conversation](#)
- [RPA, On the Cusp of Disruption](#)
- [The Life of RPA](#)
- [Insights From Early BPO Adopters of Robotic Process Automation](#)
- [The 2015 Robotic Premier League Takes Shape](#)
- [The Evolving Maturity of Robotic Process Automation](#)

## Also:

- CGP Grey (2014), [Humans Need Not Apply](#)
- Lacity, M. and Willcocks, L. (2015), “[What Knowledge Workers Stand to Gain from Automation](#),” Harvard Business Review Online, June 19.
- Lacity, M., Willcocks, L., and Craig, A. (2015), “[Robotic Process Automation at Telefónica O2](#),” The Outsourcing Unit Working Research Paper Series
- Willcocks, L., Lacity, M. and Craig, A. (2015), “[Robotic Process Automation at Xchanging](#),” The Outsourcing Unit Working Research Paper Series
- Davenport, T. and Kirby, J. (2015), “[Automation Won't Replace People as Your Competitive Advantage](#),” Harvard Business Review

# Appendix

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# Unbridled Opinion... simply calling it how it is



Thriving in the As-a-Service Economy

[HOME](#) [PUBLISHED HFS RESEARCH](#) [MEDIA COVERAGE](#) [MEET THE TEAM](#) [ABOUT US](#) [RESEARCH SERVICES](#)

## Robo-Britannia: Is Britain leading the As-a-Service revolution?

MAY 4TH, 2015



There are a lot of [negative viewpoints](#) on Britain's capabilities to rebound as an economic superpower, after its heyday leading the world into the industrial revolution a very, very long time ago. [www.horsesforsources.com](http://www.horsesforsources.com) of labor, and their lead

And while the British government is the world's biggest customer of offshore outsourcing (in fact its government has created a whole outsourcing economy of its own), Britain is also home to several of the upcoming automation software firms, such as Blue Prism, Thoughtonomy and

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## HfS Blueprint Report: Enterprise Mobility Services

This Blueprint Report examines the current state of Enterprise Mobility and ranks 23 global IT Service Providers serving the market along the axis of Execution and Innovation.

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## HfS Blueprint Report: Workday Services 2015

  | HfS launches its first Blueprint looking at the fast evolving partner ecosystem around Workday for HCM and FM services.

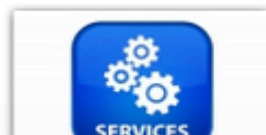
[More Service Provider Analysis >](#)



## It's 5 O'Clock Somewhere, Time for a Shot of Tequila, Salesforce and Accenture

It's hard to acquire and retain specialized consulting resources but with demand for people skilled in the new As-a-Service platforms outstripping the availability in the established service providers it's time to plunge into

[More Cloud and Business Platforms >](#)



## Is the Services Industry Going Through a Seminal Moment or Just Trimming the Flab?

Reflection on the financial results and recent news items of major Indian-heritage service providers to understand

## What's Hot



## The BPO Profession in 2015

Today's Accidental Career Path, Tomorrow's Capability Broker?

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## HfS 2015 Research Agenda



# About HfS Research

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ANALYST FIRM OF THE YEAR, BOUTIQUES, FORRESTER, GARTNER, IDC / DECEMBER 9, 2014

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| Rank                  | 1       | 2                  | 3                     | 4                     | 5                     | 6                  | 7                     | 8                     | 9                         | 10               |
|-----------------------|---------|--------------------|-----------------------|-----------------------|-----------------------|--------------------|-----------------------|-----------------------|---------------------------|------------------|
| Americas              | Gartner | Forrester Research | HfS Research          | Digital Clarity Group | IDC                   | Everest Group      | NelsonHall            | ISG                   | 451 Group                 | CEB/TowerGroup   |
| Asia-Pacific          | Gartner | Greyhound Research | HfS Research          | NelsonHall            | IDC                   | Forrester Research | Everest Group         | ISG                   | Celent                    | Aberdeen Group   |
| Business growth       | Gartner | Forrester          | IDC                   | HfS Research          | Everest Group         | NelsonHall         | Frost & Sullivan      | Digital Clarity Group | Greyhound Research        | ISG              |
| Buyers                | Gartner | HfS Research       | Forrester Research    | Digital Clarity Group | Everest Group         | IDC                | NelsonHall            | Greyhound Research    | CXP Group                 | Aberdeen Group   |
| EMEA                  | Gartner | HfS Research       | Forrester Research    | NelsonHall            | IDC                   | Everest Group      | Digital Clarity Group | CXP Group             | Pierre Audoin Consultants | ISG              |
| Global                | Gartner | Forrester Research | HfS Research          | IDC                   | Digital Clarity Group | NelsonHall         | Everest Group         | ISG                   | Greyhound Research        | 451 Group        |
| Services              | Gartner | HfS Research       | Forrester Research    | NelsonHall            | IDC                   | Everest Group      | Digital Clarity Group | ISG                   | Greyhound Research        | 451 Group        |
| Software              | Gartner | Forrester Research | Digital Clarity Group | HfS Research          | IDC                   | Everest Group      | Greyhound Research    | NelsonHall            | ISG                       | 451 Group        |
| Telecoms & Networking | Gartner | IDC                | Forrester Research    | HfS Research          | ISG                   | CXP Group          | Everest Group         | Greyhound Research    | Ovum                      | Current Analysis |
| Vendors               | Gartner | Forrester Research | HfS Research          | IDC                   | NelsonHall            | ISG                | Everest Group         | Digital Clarity Group | Greyhound Research        | 451 Group        |

# Meet the HfS Research Practice Leaders



**Charles Sutherland,  
Chief Research  
Officer**

Tech-Enablement of  
Services, Procurement,  
Supply Chain,  
Automation, Cognitive  
Computing



**Barbra  
McGann,  
EVP Business  
Operations  
Research**

Operations,  
Healthcare,  
Life Sciences and  
Public Services



**Phil Fersht,  
CEO**

The As-a-Service  
Economy,  
Operations Strategies,  
Global Business Services



**Fred  
McClimans  
EVP**

Digital Trust  
& Security,  
The Digital  
Consulter



**Jamie  
Snowdon,  
EVP**

Market  
Analysis and  
Forecasting



**John Haworth  
Chairman,  
HfS Sourcing  
Executive Council**



**Khalda de Souza  
Principal Analyst**

European  
Services  
SaaS Services



**Thomas Reuner  
MD, ITO**

SaaS, Automation,  
Cognitive  
Computing, Cloud



**Pareekh Jain  
Research Director**

Engineering Services,  
Telecom Operations,  
Pricing Strategies and  
Supply Chain



**Hema Santosh  
Principal  
Analyst**

Finance  
Strategies, BPO,  
IT Services



**Reetika Joshi  
Research  
Director**

Consumer-  
Centric  
Operations  
Services and  
Analytics

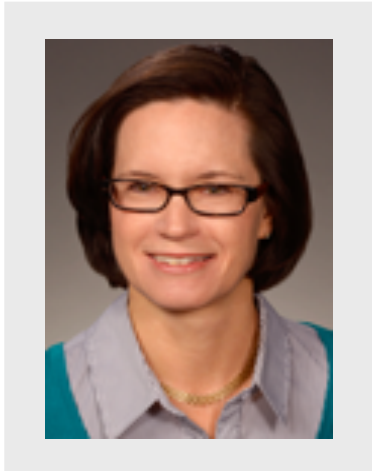
# 2015 HfS Research Blueprint Publication Schedule

| Q1 2015 (1)   | Q2 2015 (5)  | Q3 2015 (8)   | Q4 2015 (6)   |
|---|--|---|---|
| <ul style="list-style-type: none"><li>Progressive F&amp;A</li></ul> | <ul style="list-style-type: none"><li>Analytics Services</li><li>Enterprise Mobility</li><li>Population Health</li><li>Workday Services</li><li>Procurement As A Service</li></ul> | <ul style="list-style-type: none"><li>Engineering Services</li><li>Health Payer Services</li><li>Insurance As A Service</li><li>Application Testing (Aug)</li><li>Primer: Design Thinking (Aug)</li><li>Digital Trust (Sept)</li><li>IoT (Sept)</li><li>Salesforce Services(Sept)</li></ul> | <ul style="list-style-type: none"><li>Business Cloud (Oct)</li><li>Autonomics (Dec)</li><li>Embedded Engineering (Dec)</li><li>Life Sciences (Dec)</li><li>Utilities As-a-Service (Dec)</li><li>SAP SuccessFactors (Dec)</li><li>Supply Chain Management Services (Dec)</li></ul> |

*This plan is subject to change*

# Barbra McGann

EVP, Business Operations Research, HfS Research – Chicago, IL



[barbra.mcgann@hfsresearch.com](mailto:barbra.mcgann@hfsresearch.com)

## Overview

- Barbra Sheridan McGann is EVP, Business Operations Research at HfS. This role encapsulates her passion for research, analysis, and strategy, which has been 20 years in the making. Barbra's scope of work covers the business process outsourcing and emerging "as a service" market broadly, as well diving into industry and functional areas of Healthcare, Pharmaceuticals, and Public Sector.

## Previous Experience

- As the business process outsourcing market has matured, Barbra has tracked, analyzed, and advised on market and competitive moves and meaning for Accenture for over 7 years. She worked with Accenture leadership globally to develop organic and inorganic strategies that drove growth of new and mature offerings. Prior to that, Barbra helped launch and build the unique partnership between Accenture and Microsoft that created Avanade, an IT services company, focusing on the Public Sector and Financial Services markets. Barbra's career at Accenture started with reviews and events on software selection in the enterprise resource planning software market.

## Education

- Barbra earned a Bachelor of Arts degree in English with Honors, and was recognized for outstanding leadership in Volunteerism with the Chet Pagni Service Award, from the University of San Diego. She's also completed post-graduate executive leadership work at Northwestern University and Smith College.

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**HfS Research** is the leading analyst authority and global network for IT and business services, with specific focus on global business services, digital transformation and outsourcing. HfS serves the research, governance and services strategy needs of business operations and IT leaders across finance, supply chain, human resources, marketing, and core industry functions. The firm provides insightful and meaningful analyst coverage of best business practices and innovations that impact successful business outcomes, such as the digital transformation of operations, cloud-based business platforms, services talent development strategies, process automation and outsourcing, mobility, analytics and social collaboration. HfS applies its acclaimed Blueprint Methodology to evaluate the performance of service and technology in terms of innovating and executing against those business outcomes.

HfS educates and facilitates discussions among the world's largest knowledge community of enterprise services professionals, currently comprising 150,000 subscribers and members. HfS Research facilitates the [HfS Sourcing Executive Council](#), the acclaimed elite group of sourcing practitioners from leading organizations that meets bi-annually to share the future direction of the global services industry and to discuss the future enterprise operations framework. HfS provides sourcing executive council members with the HfS Governance Academy and Certification Program to help its clients improve the governance of their global business services and vendor relationships.

In 2010 and 2011, HfS Research's Founder and CEO, Phil Fersht, was named "Analyst of the Year" by the International Institute of Analyst Relations (IIAR), the premier body of analyst-facing professionals and achieved the distinctive award of being voted the research analyst industry's Most Innovative Analyst Firm in 2012.

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