



## Shifting gears into the second wave

George Kaczmarskyj, Principal  
Ernst & Young LLP

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# Topics

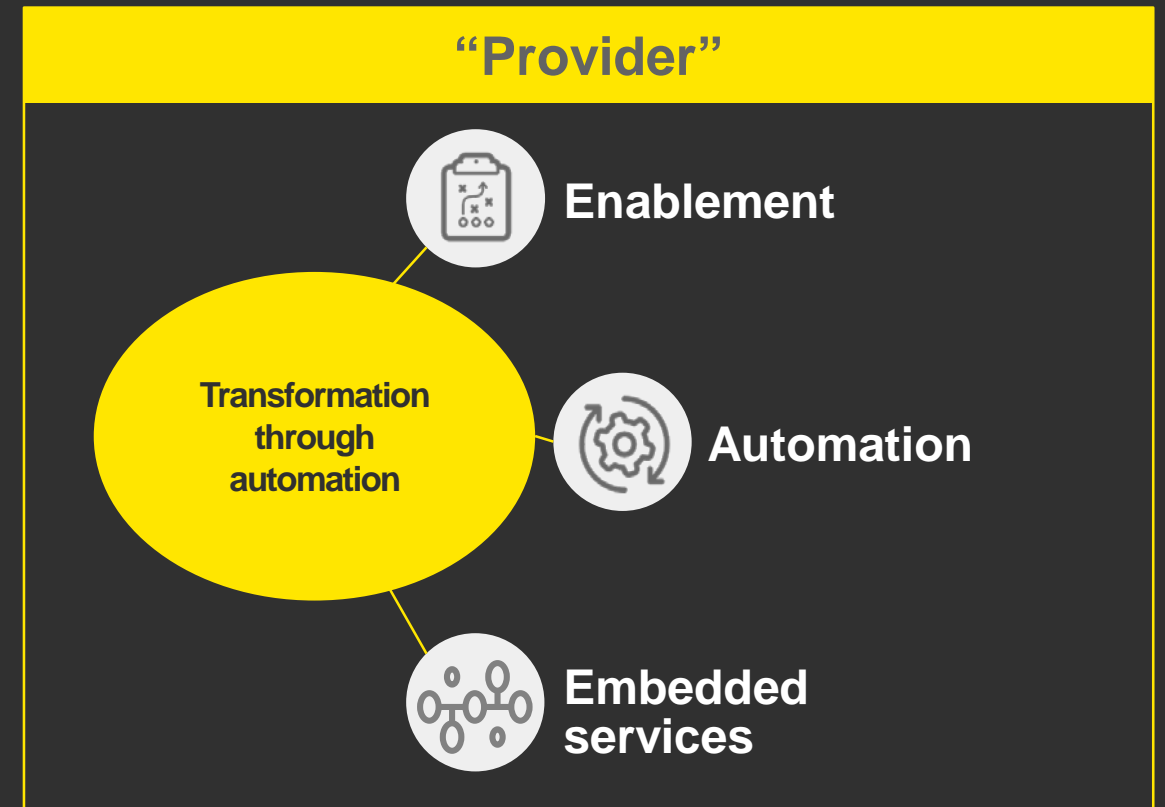
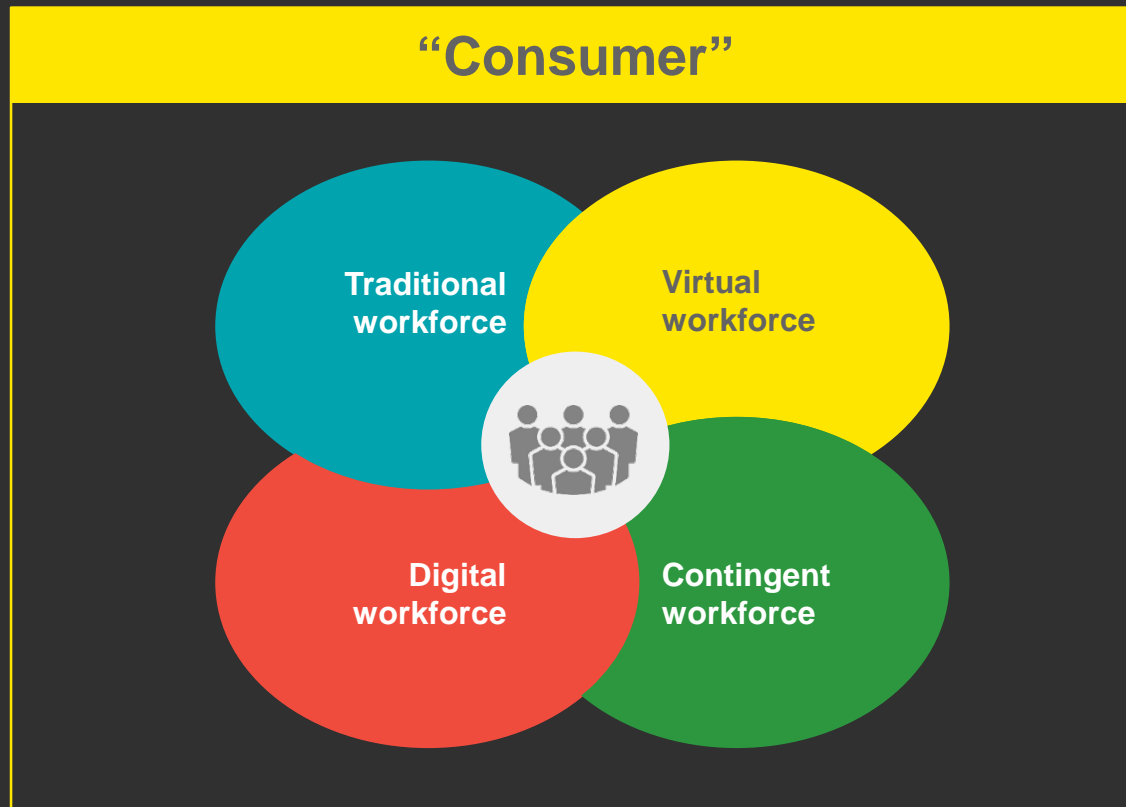
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- ▶ Market reflections and trends
- ▶ Looking forward into convergence and transformation
- ▶ Scaling for success

# EY automation ambition

## Planning for the future of business

- ▶ Reduce delivery and operational costs
- ▶ EY's "workforce of the future" strategy – transformation
- ▶ Create new business opportunities



# Market reflections and trends



# What's changed in the last year?

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1

Exponential growth of interest (and vendor valuations!)

2

Belief in robotics process automation (RPA) increasing – including through end-user support communities

3

But most organizations are still struggling:

- ▶ With poor delivery
- ▶ Where to implement RPA/get good return on investment (ROI)
- ▶ How to scale!

4

Confusion – is RPA old hat, should we be going straight to artificial intelligence (AI)?

5

Ambition – maybe RPA can enable end-to-end transformation?

# We see a stratification emerging...

~85%

## Organizations struggling to scale

- ▶ Average size of RPA workforce is ~10-20 robots.
- ▶ There is a significant adoption difference geographically.

Still need to do the basics better

~15%

## Some organizations going large on Core Ops

- ▶ E.g., global banks looking at large scale delivery into hundreds of robots
- ▶ Global rollouts across multiple continents
- ▶ Starting to incorporate AI add-ons

Much more complex op model (Center of Excellence (CoE)/control room/hub), governance, methods, skills

~1-2%

## E2E Transformation using RPA, Digital, AI

- ▶ RPA today is limited to sub-processes.
- ▶ But mature clients are now understanding that RPA, Digital and AI can transform E2E process.
- ▶ Digital ops factories

Move to combined RPA/Digital/AI/BPM\*/CoE

\* Business process management (BPM)

## And we are still very early in the journey...

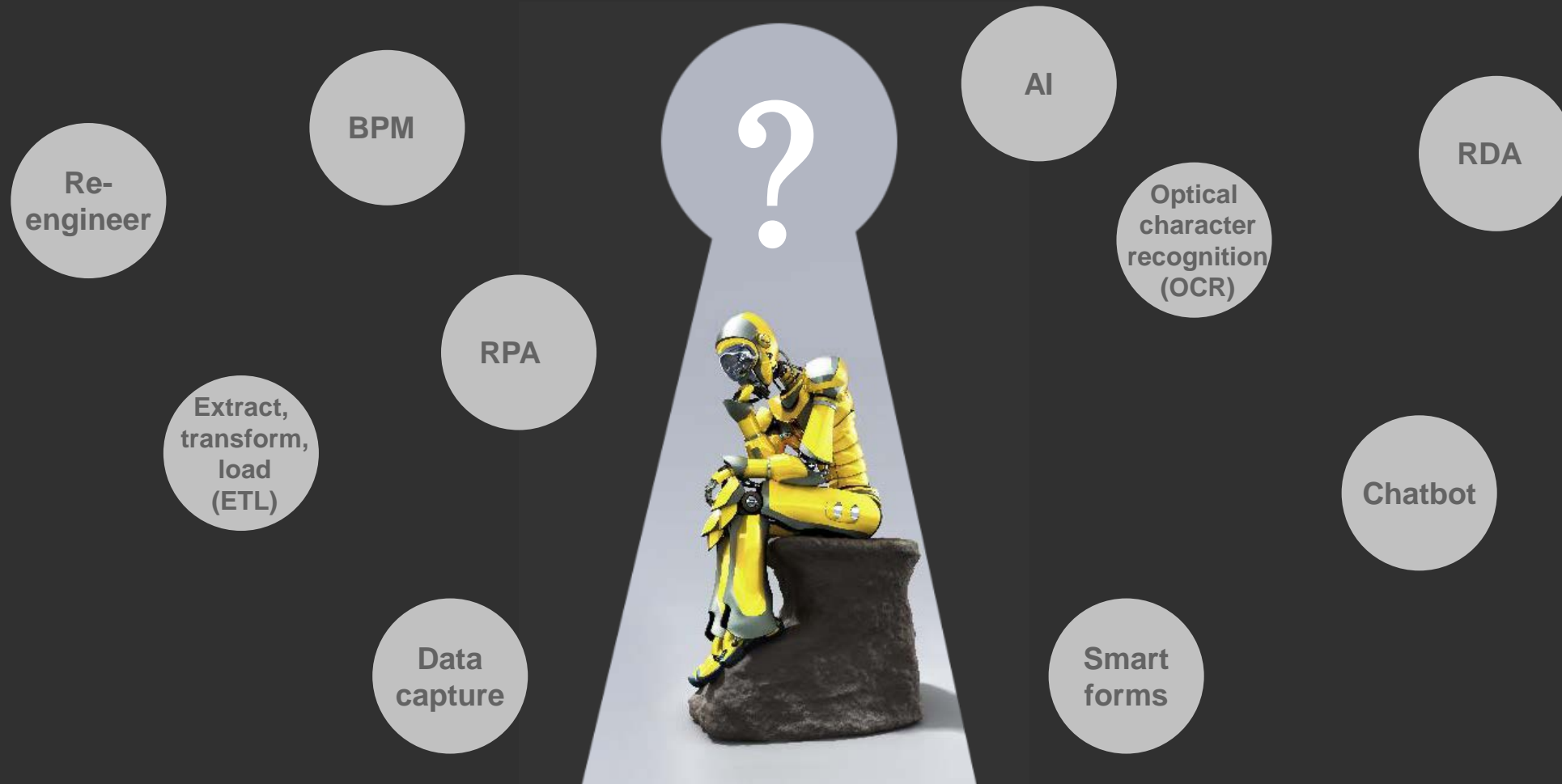
- ▶ Vendors estimate <5% market penetration.
- ▶ Quality and breadth of delivery, methods, accelerators are the key differentiators.

# Looking forward into convergence and transformation

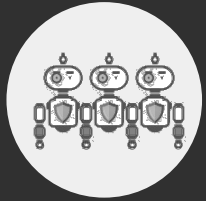




# To fully automate processes, we need to use both an expanded spectrum of automation and better use of people



# EY has been on an accelerated journey in its intelligent automation efforts



290 bots in production



270 bots in flight



130 bots in pipeline

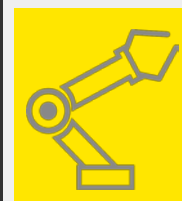


690 total processes



325 dedicated headcount

1



Robotic process automation traditional

Repetitive, rule-based, high volume activities  
~65%

2



RPA cognitive

Manage unstructured data through machine learning and natural language processing  
~15%

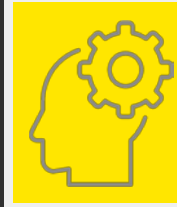
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Intelligent chatbots

Interaction with users (internal or external)  
~10%

4

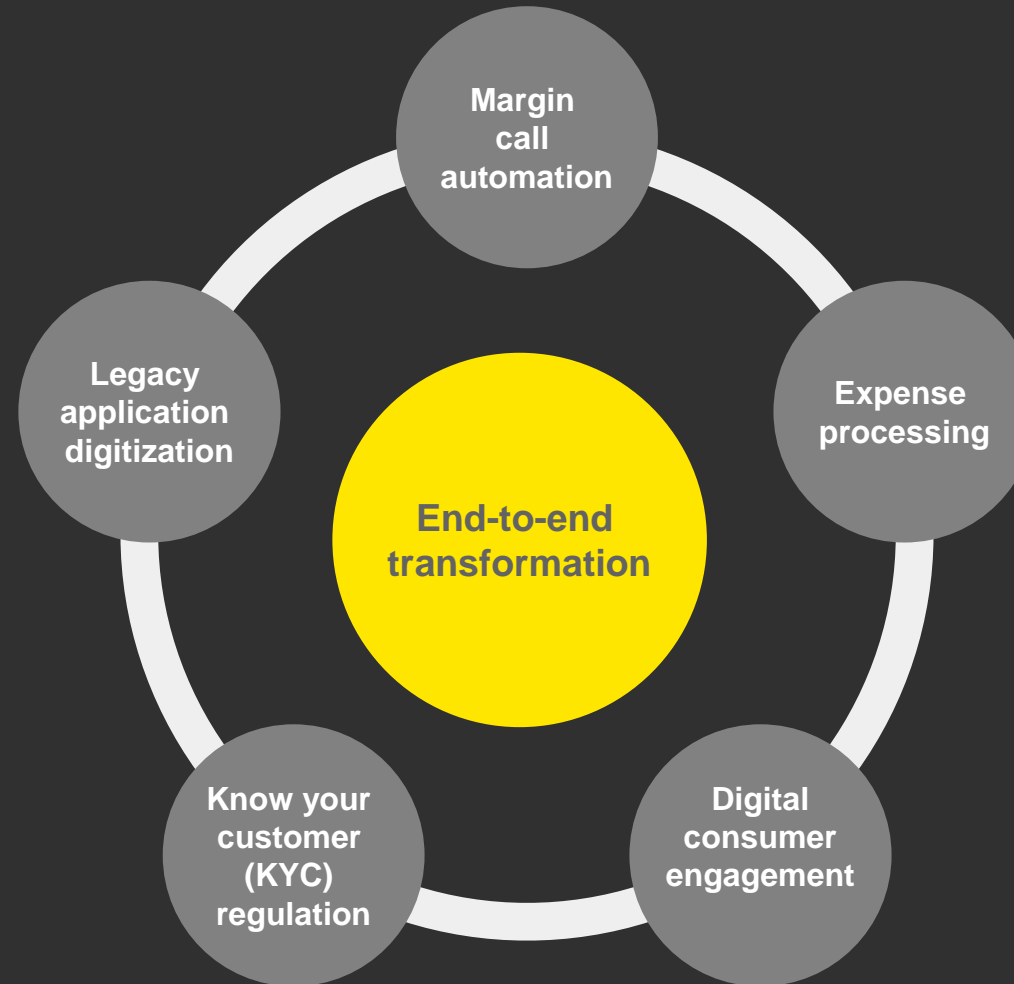


Artificial intelligence

Augment and mimic insights, decision making  
~10%

# Convergence in automation techniques is accelerating and being adopted across a variety of scenarios

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# Scaling for success



# EY: reflections and learnings from one of the largest RPA consumers across the globe

## “Transformation learnings”

- ▶ Finding opportunities is the biggest bottleneck.
- ▶ If you just look for RPA opportunities, then often we just look at sub-processes.
- ▶ You need to augment RPA to build the biggest backlog of work:
  - ▶ Machine learning (ML) OCR
  - ▶ Digital enablers
  - ▶ AI/Cognitive

## The “table stakes”

- ▶ Structure and governance
- ▶ Methodology and reuse
- ▶ Skills development and retention
- ▶ Control room

Going forward, we need to look at processes end-to-end, and potentially redesign them, to maximize ROI.

# Contact us

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George Kaczmarskyj  
Principal  
Ernst & Young LLP  
[George.Kaczmarskyj@ey.com](mailto:George.Kaczmarskyj@ey.com)

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