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Elevating Customer Engagement

Integrating IT and Business Process Automation to Deliver Connected Experiences

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Introduction

In the pursuit of establishing a lasting influence on customers, businesses are striving to create connected experiences. To maintain customer engagement, businesses must prioritize personalization and, more importantly, provide contextual information during key moments in the customer journey. The challenge lies in scaling these personalized customer journeys. Automation plays a significant role in the enterprise transformation journey, reducing human intervention to deliver connected experiences and fostering business growth and sustainability. The rapid acceleration of AI and ML is propelled by enhanced algorithms, increased processing power, and more access to data. These advances catalyze a shift from rules-based automation to a more holistic approach. Present macroeconomic conditions have further exacerbated the importance of automation initiatives to achieve more with fewer resources.

Enterprises often invest in isolated automation initiatives. Both IT and business functions have distinct goals for automation investments, lacking sufficient collaboration between them. This siloed approach hampers the realization of automation's full potential, leading to multiple challenges and hindering the scaling of automation initiatives across organizations. In contrast, organizations that adopt a unified approach to automation, integrating both IT and business process automation, position themselves for a competitive advantage. They prioritize collaborative automation initiatives across various layers, encompassing processes, applications, infrastructure, and data. This holistic approach, termed enterprise automation in this viewpoint, aims to deliver customer requirements while enabling employees to focus on high-quality work, thereby improving overall business outcomes.

This viewpoint examines various aspects of automation transformation journeys, emphasizing the necessity for collaboration between business and IT to deliver connected experiences. In this report, we:

- Explore various aspects of IT and business process automation in delivering connected experiences
- Introduce an enterprise automation maturity framework to assess the current state and envision the desired future state
- Examine key challenges and impart best practices to drive enterprise automation at scale
- Understand providers' role in enabling enterprise automation

Digital transformation leaders, executives responsible for optimizing business and IT processes, chief operating officers, other C-suite executives, and business leaders responsible for operations improvement will benefit from this report.

Delivering connected experiences with enterprise automation

Demonstrating value from enterprise automation

To achieve seamless customer experiences, a high level of integration between IT and business process automation is essential. IT automation involves the streamlining and automation of various IT activities, spanning tasks such as auto-code generation, test automation, automated deployment, provisioning, network configuration, and recovery automation. Conversely, business process automation entails automating workflows and optimizing business processes across diverse functions such as customer service, finance and accounting, and supply chain management. Embracing enterprise automation represents a more holistic approach that incorporates both business process and IT automation, with a distinct emphasis on realizing value.

Let us explore the value realized through enterprise automation with an example. A leading financial institution employs enterprise automation to optimize its Know Your Customer (KYC) process, addressing personalized customer demands and diverse regulatory requirements across multiple countries.

- The business process automation team implements a KYC-as-a-service model using a low-code platform. This platform allows customization, fostering synergies between IT automation and business process automation to keep the customer experience at the forefront of the transformation
- Unlike previous automation efforts targeting subprocesses such as document collection and verification, the KYC-as-a-service model adopts a holistic approach. It automates the complete end-to-end process, covering risk assessment, customer due diligence, reporting, decision-making, and monitoring. Seamless integration with legacy systems and external sources, such as sanction lists and credit bureaus, enhances KYC due diligence. IT automation ensures the automatic collection and verification of customer information from various sources
- The platform remains adaptive to regulatory changes across different jurisdictions. When new requirements emerge, it automatically updates decision-making rules, demonstrating the flexibility of business process automation. This not only meets stringent regulatory requirements but also exceeds customer expectations while reducing operational risks
- The IT automation system monitors server metrics and automatically scales up resources or provisions additional servers if KYC requirements increase or customer volumes grow
- Customers benefit from a streamlined onboarding process, reduced paperwork, and faster approvals. Real-time updates on application status enhance transparency and satisfaction. Post-onboarding, the model continuously surveils customer transactions for risks or fraud, triggering proactive risk management alerts. This proactive approach enhances the overall customer experience throughout their journey with the institution

The KYC transformation serves as a prime example of how enterprise automation, through the powerful synergy of IT automation and business process automation, not only streamlines processes but also ensures personalized experiences for customers throughout their journeys.

Understanding the enterprise automation technology ecosystem

The increasing demand for end-to-end automation in enterprises is evident. Companies are actively seeking best-of-breed technology solutions while integrating these solutions to realize maximum value. Successful enterprises strategically orchestrate diverse initiatives to deliver seamless, connected experiences across channels for their customers.

Exhibit 1 illustrates the automation ecosystem, comprising key elements that must converge to create these seamless experiences. These technology elements interact with existing enterprise systems to drive real-time data exchange. The exhibit categorizes these various technology elements into distinct layers: the experience or interaction layer, the engagement layer, and the support layer. It's important to note that the presented exhibit offers a simplified view, and the actual ecosystem within large enterprises is considerably more intricate.

EXHIBIT 1

Enterprise automation ecosystem

Source: Everest Group (2023)

Experience or interaction layer

Chatbots	Wearables	Social media, word of mouth	Websites	Email	Mobile applications, notifications	Sales, customer support

Key elements of enterprise automation

Engagement layer

Business process layer	RPA	Process orchestration	IDP	CAI
	Process mining	Task mining	Business rules / Decision hub	
Applications layer	Auto-code generation	Test automation	Integration	

Support layer

Infrastructure layer	DevOps (DevSecOps, CI/CD)	Performance management	Container and orchestration	
	Infrastructure as a code	Automated provisioning	ITSM automation	Network automation
	Backup and recovery	Workplace automation	Configuration management	
Data layer	Data fabric	Data mesh	Data warehouse	Data lake
	Test data management	API automation	Data management	Data security

Low-code/No-code, generative AI, analytics

Enterprise Resource Planning (ERP), Customer Relationship Management (CRM), Human Capital Management (HCM)

- **Experience/Interaction layer** – The experience or interaction layer serves as the crucial interface connecting customers and businesses. Its primary purpose is to create a user-friendly and intuitive interface, facilitating user interactions with software applications or systems. Encompassing design elements, visual presentation, and user experience considerations, this layer ensures that users can easily navigate, input information, and receive feedback. Its objective is to enhance user engagement and satisfaction across various devices and platforms.

  This layer plays a vital role in delivering connected experiences to customers. It allows businesses to provide the right information, at the right time, and through the right channel. To do this, the experience layer must be able to abstract away the underlying complexity of business processes, technology systems, and data sources. For enterprises, the strategic focus should be on optimizing end-to-end customer journey experiences.

- **Engagement layer**
  - Business process layer

    The engagement layer comprises processes and applications with which customers interact directly. At the core of the business process layer is a focus on the essential processes within the enterprise value chain. This layer integrates various technologies such as Robotic Process Automation (RPA), process orchestration, case management, Intelligent Document Processing (IDP), Conversational AI (CAI), process mining, task mining, and decisioning hubs. While RPA is employed to automate repetitive tasks, process orchestration enhances the coordination of complex workflows. Case management addresses dynamic and unstructured work sequences, and business rules along with decision hubs assist in making critical decisions using data, analytics, and predefined rules. IDP is used to extract and process information from unstructured data. Process and task mining provide valuable insights into existing processes, identifying bottlenecks and optimizing overall process flow. Advances in CAI, incorporating Natural Language Processing (NLP) and ML, are revolutionizing customer interactions. To maximize benefits, enterprises must focus on making business processes composable and modular. Breaking down large processes into reusable micro-processes promotes agility within the system, allowing for adaptability and efficiency enhancements.

  - Engagement layer: applications layer

    The application layer expands the impact of automation technologies across various aspects of software development. This layer includes auto-code generation, test automation, and integration solutions. Auto-code generation is instrumental in creating code based on high-level requirements, accelerating the software development cycle. Test automation within this layer streamlines the testing process, while integration solutions ensure smooth connectivity between diverse applications and systems. Enterprises are advised to prioritize the development of applications at scale, leveraging reusable assets and encouraging citizen development efforts. This approach promotes efficiency, scalability, and adaptability in the software development life cycle.

- **Support layer**
  - Infrastructure layer

    The underlying support layer, comprising the infrastructure and data layers, serves as the foundation for enterprises to establish and optimize engagement and experience layers. The infrastructure layer forms the backbone of the automation technology landscape, providing essential resources to support the entire ecosystem. Continuous Integration (CI) / Continuous

Deployment (CD) practices and DevOps methodologies enable agile software releases. Performance management tools monitor and optimize system performance, ensuring optimal user experiences and system efficiency. While containerization and orchestration technologies facilitate automated deployment, scaling, and management of applications, Infrastructure as Code (IaC) enables the automated provisioning and management of infrastructure resources through code. Additionally, workplace automation and IT Service Management (ITSM) automation improve employee productivity and enhance service delivery through automated incident management, request fulfillment, and asset tracking.

– Data layer

The data layer is a vital component of the automation technology landscape, focusing on effectively managing and utilizing data. This layer incorporates various technologies such as data fabric, data mesh, data warehouse, data lake, test data management, API automation, data management, and data security solutions. Data fabric and data mesh aim to provide scalable and distributed data architectures, enabling seamless data sharing across the organization. Test data management solutions automate the provisioning of test data, ensuring efficient testing processes. API automation facilitates automated communication between different applications and services. Data security solutions, employing measures such as encryption, access controls, and monitoring, safeguard data integrity and confidentiality, ensuring the trustworthiness of automated processes and systems reliant on the data layer.

Additionally, technologies such as low-code, generative AI, and analytics cut across all layers, transforming the automation landscape.

- Low-code/No-code platforms empower citizen developers to create applications and automate processes with minimal coding, revolutionizing application development and process automation
- Generative AI enables businesses to autonomously generate content, amplifying automation journeys across layers, from generating code, automating test cases, and creating test data, to managing customer support tickets and summarizing incidents
- Advanced analytics leverages AI to uncover patterns and insights from vast datasets, playing a crucial role in data-driven decision-making and predictive modeling

Moreover, organizations can enhance efficiency, productivity, and sustainability by investing in automation and creating defined guardrails. Integrating sustainability considerations into the design and execution of automation projects can yield long-term environmental and economic benefits.

Enterprise automation maturity framework

Enterprises vary in their automation maturity, influenced by factors such as current scope, funding, automation pipeline, talent, governance, reusability, technology investments, and performance. To gain a clearer understanding, we have classified enterprises based on their automation maturity capabilities into three categories: basic, intermediary, and advanced automation. Enterprises may fall into any of these categories or occupy a state between the identified levels. As enterprises expand their automation initiatives, their capabilities increase, and they progress along the maturity curve. Mature enterprises prioritize experience-driven initiatives over efficiency-focused investments.

Exhibit 2 highlights the key characteristics of enterprises in these three states. Let us delve into the key attributes of each automation state for a more comprehensive understanding.

EXHIBIT 2

Enterprises automation maturity framework

Source: Everest Group (2023)

	Basic automation	Intermediary automation	Advanced automation
Objective function	Cost efficiencies	Cost and operational benefits	Strategic benefits and experience imperatives
Scope and targeted process types	• Efficiency-driven initiatives • Automate transactional tasks and basic IT activities • Focus on low-hanging fruits • Siloed automation initiatives	• Mostly efficiency-driven and to some extent experience-driven initiatives • Automate transactional with some focus on judgement tasks • IT and business automation in siloes • Ad hoc collaboration across business units	• Experience-driven initiatives • Automating transactional and judgement-intensive tasks • Collaborative IT and business automation • Focus on STP and organization-wide automation
Funding/ Sponsorship	Primarily sponsored by the IT budget	Primarily funded by business units' budget	Mix of center-led and business-led funding
Automation pipeline responsibility	Individual business process owners and IT automation team	Individual business process owner, process mining tools, and IT automation team	Citizen-led discovery, centralized CoE, process mining tools, process owners, and IT automation teams
Talent, team structure, and governance	• No dedicated automation teams • Largely shared talent from IT and operations • Design, delivery, and strategy teams operate in silos and lack collaboration • Limited leverage of citizen developers • Siloed approach with no CoE support	• Centralized CoE with well-defined roles • Sharing resources within a business function across geographies • Design, delivery, and strategy teams operate in silos but have well-established collaboration • Good leverage of citizen developers • Multi-pronged approach with CoE support • CoE governs 40-60% of automation initiatives	• A hub and spoke CoE model with a presence across business units • Sharing resources across most business functions and geographies • Follows a fusion team concept. Customer journey experts and product owners work together in certain sprints • Higher leverage of citizen developers • Multi-pronged approach with robust CoE support and IT collaboration • CoE governs >80% of automation initiatives
Reusability of automation use cases	Does not have a library of reusable automation use cases	Developed libraries of reusable automation and shared across some business units and regions	Developed a central library of reusable automation and shared across the entire organization worldwide
Technology investments	Investments only in mature technologies such as RPA, test automation, and configuration management	Robust investments in mature technologies and average investments in new technologies such as data fabric, generative AI, and process mining	Robust investments across the entire automation landscape
Key metrics	• Metrics are ad hoc and poorly controlled • Cost impact: cost savings, number of use cases automated, and number of automated hours	• The metrics are in addition to those in basic automation • Operational impact: employee productivity, operational efficiency, TAT, and better governance • IT infra utilization and license utilization • CSAR, employee satisfaction, reusability rate, RoI, and revenue growth	• Along with intermediary metrics, the below metrics or outcomes are expected • Positive impact on experience metrics such as customer satisfaction and NPS • Bot reusability is high due to IT team's collaboration creating higher order efficiency • IT query handling automation through AIOps leading to increased employee satisfaction • Tight causality between IT metrics and operational business outcomes
Performance tracking	Collection and data analysis is ad hoc and sporadic	Performance data is regularly collected to create product dashboards	Performance is monitored in near real-time to make operational and strategic decisions

- **Basic automation state** – Enterprises in the basic automation state have started their automation efforts but remain in the early stages. Typically, these organizations have a significant legacy footprint. They have commenced their IT and business automation journeys, but in silos. There is a lack of collaboration between IT automation and business process automation stakeholders. Often, these enterprises encounter challenges in establishing and maintaining a strong automation pipeline.
- **Intermediary automation state** – Enterprises in the intermediary automation state have invested significantly in automation initiatives. They have enhanced their focus on automating judgement-intensive tasks along with automating transactional tasks. These enterprises actively invest in newer technologies to enhance operational intelligence. However, a notable drawback is the limited collaboration between business units and IT stakeholders in driving automation initiatives. The primary challenge that enterprises face at this stage is the insufficient access to diverse data sources within the organization, resulting in a low rate of reusability.
- **Advanced automation state** – Enterprises in the advanced automation state maintain a cohesive approach to both IT and business process automation. They have strong collaboration among IT, business units, compliance, and security teams. Their focus extends to automating end-to-end processes that span multiple enterprise systems. The idea is to have a well-connected back, middle, and front office functions. These enterprises are characterized by unified leadership from the CIO/COO offices, jointly driving automation transformation efforts. In their automation initiatives, they cover aspects of IT automation, business process automation, and, most importantly, change management efforts. With a robust operating model, they efficiently scale automation use cases, seamlessly extending from one business unit to another.

Challenges and best practices to drive automation at scale

Enterprise challenges in advancing their automation capabilities

Automation technologies benefit enterprises significantly by reducing human intervention across both IT and business processes. Despite the benefits, many enterprises struggle to realize their intended business outcomes. In this section, let us delve into the key challenges that hinder enterprises from successfully scaling up their automation initiatives to attain the advanced state of automation.

Lack of leadership vision and change management efforts – Leaders serve as the ambassadors and key communicators in the automation transformation journey. Their buy-in is necessary to effectively convey the vision, goals, and benefits of the transformation throughout the entire organization. When leaders are not fully engaged, it leads to miscommunication, confusion, and a lack of employee engagement. Often, employees resist the changes resulting from automation initiatives due to the fear of job loss. Overcoming this resistance and fostering employee acceptance through change management efforts is a challenging task for enterprises.

Implementing the right change management strategy emerged as a key challenge for 62% of enterprises.[1]

1 Scaling up Intelligent Automation

Disconnect between business and IT – Divergent business objectives and KPIs for automation between IT and business leaders hinder the maximization of business outcomes from automation initiatives. The lack of collaboration limits the effectiveness of automation efforts. The IT function contributes essential technical expertise and resources to implement automation solutions, while the business teams bring process knowledge and requirements to ensure process automation is implemented effectively. Optimal identification of automation opportunities and the selection of appropriate automation tools and technologies are best achieved through the collaborative efforts of IT and business teams.

Accumulation of technical debt – Technical debt hinders enterprises in scaling up their automation initiatives. The accumulation of backlogs leads to increased maintenance efforts, longer development cycles, and reduced agility. When automating processes, technical debt can manifest as challenging-to-integrate legacy systems, impeding the acceleration of scaling efforts. This can lead to inconsistencies between different systems, making it difficult to develop reusable automation solutions. To fully realize the scaled benefits of automation, enterprises must consistently free themselves from technical debt.

Fragmented data landscape – In large enterprises, data dispersion across various systems, business units, and databases results in the formation of data silos. This fragmented data landscape hampers the ability to gain a holistic view of operations and impedes automation transformation efforts. Collaborating with IT, compliance, and security functions is vital for automation programs to access sensitive data such as Personally Identifiable Information (PII), essential for executing enterprise-wide automation projects. This alliance enhances reusability, reduces effort duplication, supports innovation, and increases the Straight Through Processing (STP) rate. However, due to the fragmented data landscape and the disconnect between business units and IT, enterprises often struggle to deploy automation use cases across the organization, hindering their ability to achieve economies of scale.

A substantial 68% of enterprises indicated removing roadblocks from compliance and security functions as a key challenge.[2]

Lack of structured governance and operating model – Enterprises face challenges due to the absence of a central Center of Excellence (CoE) or a governance model for their automation initiatives. Without a well-defined operating model, there is a lack of clarity in roles, governance, and control mechanisms needed to ensure compliance and effective risk management. The absence of clearly defined responsibilities and internal collaboration leads to delayed results on automation investments. Moreover, it hampers the enterprise's ability to reuse automation bots across different business units due to differing standards.

2 Ibid

Failure to encompass the customer experience journey in entirety – Harnessing the power of automation requires a deep understanding of customer touchpoints. This comprehension enables enterprises to strategically deploy automation efforts that not only streamline operations but also elevate the customer experience across the entire journey. This approach is vital for delivering a seamless omnichannel experience and crafting personalized interactions driven by intelligent decision-making. Without this strategic approach, businesses risk misaligning their automation efforts, potentially falling short of customer expectations and undermining the potential benefits of automation. Understanding customer touchpoints and adopting a comprehensive view of the customer journey are fundamental steps in unlocking automation's true transformative power.

Resource/Budget constraint – Automation initiatives demand investments in modern technologies, software, infrastructure, and hiring specialized talent. However, enterprises often grapple with limited financial resources, constraining their ability to implement comprehensive process improvements. This financial constraint leads to prioritizing initiatives, postponing certain projects, or seeking alternative cost-effective solutions. Budget approvers are hesitant to allocate continuous budgets for automation unless a substantial pipeline of identified automation opportunities is evident beyond the initial successful Proof of Concept (PoC) and a few validated use cases.

A significant 44% of enterprises indicated maintaining a healthy pipeline of opportunities as a key challenge.[3]

Expectations mismatch – Many stakeholders harbor unrealistic RoI expectations from automation initiatives, often failing to align them with the enterprise's automation maturity. Determining the success and RoI of automation transformation initiatives can be challenging, especially in the initial stages, as the transformation is a lengthy and evolving journey. The complexity arises in establishing relevant metrics, tracking progress, and demonstrating tangible benefits. The automation program office plays a vital role in setting realistic expectations at various checkpoints within automation engagements.

Everest Group's take

Enterprises often overlook the aspect of establishing an effective communication channel between business units and IT stakeholders. Without this collaboration, organizations struggle to establish standards, leading to a dismal reusability rate and increased effort duplication. To address this challenge, enterprises must reassess their automation strategies to establish robust operating models. These models are essential to support stronger pipelines, foster collaboration, and elevate the overall reusability of automation efforts.

3 Ibid

Enterprises at the basic automation level face a multitude of challenges that impede their progression to intermediary and advanced automation levels. Their legacy footprint and siloed automation efforts result in limited outcomes, preventing them from attaining the level of success achieved by enterprises at advanced levels. To overcome these challenges, a comprehensive review of automation strategies, a thorough overhaul of the overall automation roadmap, and a reevaluation of execution responsibilities are necessary. These enterprises can benefit from adopting best practices seen in other successful firms to pave the way forward.

For enterprises in the intermediary automation state, the challenges are more strategic in nature. While they may have successfully collaborated with other businesses (in many cases), extending collaboration with the IT function is crucial. This extended collaboration holds the key to unlocking new organizational benefits, including a higher reusability rate, increased STP rate, quicker implementations, and enhanced standardization. Moreover, it significantly reduces the duplication of efforts, contributing to a more streamlined and efficient automation process.

Industry best practices to drive enterprise automation at scale

In exploring the automation maturity framework and the challenges that enterprises face in their automation journey, this section now shifts its focus to sharing best practices seen in large enterprises that have reached an advanced maturity state, successfully running extensive automation programs.

- **Develop a clear roadmap** – To effectively scale enterprise automation, having a well-defined strategy is crucial. This involves setting clear goals and objectives, prioritizing processes for automation based on their potential impact and complexity, and aligning automation efforts with overall business objectives. It is important to have an end-to-end view of any process and collaborate with stakeholders involved across the entire process value chain.
- **Adopt a scalable automation platform** – Choosing the right automation platform is vital for scalability. It is essential to opt for a platform that can accommodate growing automation needs without requiring significant rework or migration. Factors such as composability, compatibility with existing systems and technologies, security, and the availability of developer resources should be thoroughly considered. A scalable automation platform facilitates the smooth expansion of automation initiatives across various processes, departments, and business units.

  Build the right talent – The success of automation initiatives hinges on a skilled and knowledgeable team. It is crucial to assemble a team well-versed in automation technologies such as RPA, ML, and AI. This team should include individuals with programming and data analysis skills who can develop and maintain automation solutions. Investing in training and upskilling existing employees or recruiting professionals experienced in automation is essential. Promoting collaboration between the automation team and other departments ensures a comprehensive understanding of industry-specific business processes and requirements. Establishing clear career paths, offering training programs, and fostering a culture of continuous upskilling are key talent management practices to ensure the organization has the necessary skills and expertise to drive automation initiatives effectively.
- **Choose the right governance model** – Selecting the right governance model for automation programs is important for enterprises, and it should align with their specific needs and stage of growth. For mid-segment enterprises, a centralized governance model may be suitable. This model allows for a central team to oversee and control automation efforts, ensuring consistency, standardization, and high reusability. On the other hand, growing enterprises with multiple diverse

business units may benefit from a decentralized governance model. This model empowers individual business units to manage their automation initiatives while adhering to overarching guidelines. For large enterprises with multiple business units, a federated governance model could be the ideal choice. This model allows each unit to tailor its governance model to unique requirements while still maintaining coordination at the enterprise level for standardization and reusability.

- **Establish monitoring mechanism** – Enterprises must strive to establish a comprehensive monitoring system that effectively safeguards the return on their investments and drives essential business outcomes. This involves deploying enterprise-centric systems and cutting-edge tools that enable seamless tracking of crucial performance indicators, system logs, and valuable feedback. By attaining deep visibility into their automated processes, enterprises can proactively detect and swiftly resolve issues, while continuously enhancing their operations. This vigilant monitoring mechanism ensures the sustained alignment of transformation initiatives and maximizes the value derived from IT automation investments, empowering organizations to optimize their overall performance.

Everest Group's take

Enterprises in the advanced stages of automation maturity have implemented several best practices for successful automation programs. These include developing a clear automation strategy aligned with business objectives, building a skilled automation team, adopting a scalable automation platform, establishing the appropriate governance model, and implementing a comprehensive monitoring mechanism. These practices ensure efficient scaling, talent management, technology compatibility, standardized governance, and proactive issue resolution, ultimately leading to achieving intended business outcomes.

The role of providers

Providers play a vital role in assisting organizations in achieving their desired business outcomes by managing automation initiatives. Automation solutions are crucial elements of organizational transformation endeavors. However, not all organizations possess the capability to efficiently implement and sustain these solutions internally. As data volumes continue to grow exponentially and a wide range of automation solutions become available, organizations are actively partnering with providers to oversee their automation initiatives. Outsourcing providers are increasingly assuming the role of strategic partners, providing consulting services, technical expertise, domain knowledge, and access to skilled professionals. This section will concentrate on delineating the different functions fulfilled by providers in aiding enterprises in attaining their intended business objectives.

- **Technology selection guidance:** Providers offer guidance in selecting appropriate automation technologies and tools, considering factors such as scalability, compatibility, security, and cost-effectiveness. They act as advisors, assisting organizations in selecting technology partners that precisely align with their specific needs
- **Establishing a CoE:** Leveraging their experience, providers assist in designing and establishing a dedicated hub for automation initiatives, innovation, and knowledge sharing – a CoE. This CoE also guides in change management and acts as a bridge across different stakeholders in the organization

- **Use case identification:** Providers work closely with enterprises to identify optimal automation use cases. They meticulously analyze existing workflows and processes, understand pain points and bottlenecks, and prioritize areas with the greatest potential for automation, considering feasibility and scalability. Additionally, they leverage a vast repository of use cases from serving clients in the same industry
- **Solution implementation:** Once use cases are identified, providers assist in implementing and deploying automation solutions. They develop tailor-made workflows, configure automation tools, and integrate systems and applications. Collaborating closely with the organization's teams, they ensure the smooth integration of automation into existing systems and processes. Larger providers may also offer comprehensive change management support
- **Workforce training:** Providers play a vital role in training and educating employees, equipping them with the necessary skills and knowledge to effectively leverage implemented use cases. They conduct interactive workshops, create comprehensive training materials, and provide hands-on guidance to empower users with the essential skills and knowledge required for success

Conclusion

In this viewpoint, we have emphasized the importance of collaboration between IT automation and business process automation stakeholders to deliver connected customer experiences. While many enterprises invest in siloed automation initiatives for cost efficiencies, the benefits can be short-lived without collaboration with the IT function. These enterprises often encounter multiple challenges and struggle to scale up automation initiatives across the organization. On the contrary, enterprises that adopt a unified view of IT and business automation are positioned to deliver scaled personalized experiences, gaining a competitive edge. These forward-looking enterprises aim for holistic automation across the experience, engagement, and support layers. These initiatives prioritize delivering customer needs rapidly and enabling employees to focus on quality work, ultimately leading to improved business results.

Enterprises are encouraged to evaluate their current maturity levels, benchmarking against the automation maturity framework presented in this viewpoint. The way forward involves assessing the current state, committing to the desired end state, and revamping automation efforts to achieve it. The best practices highlighted in this viewpoint will assist enterprises to realign their strategies and automation efforts, facilitating progress in their automation transformation journeys.

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