



# KOFAX

## The CIO's Guide to Intelligent Automation

4 Ways to Chart Your Path

*Work Like Tomorrow.™*

We talked to Chief Information Officers, senior IT executives and technology experts from multiple industries at CIO Perspectives 2019, and we heard:



**CIOs are ready for the next evolution of their digital transformation.**

**Intelligent Automation** brings together RPA, process orchestration, cognitive capture, intelligent OCR, machine learning, mobile and multichannel, advanced analytics and e-signature onto one integrated platform to create operational efficiency and drive maximum business value.

➤ In readying their organizations for intelligent automation, CIOs voice four key concerns:



Where do we start?



How do we talk to employees about automation?



How do we preserve our culture as processes and technologies change?



How do we scale beyond RPA?

## ➤ #1: Where do we start?



➤ **Create a strategy, but execute in phases.**

✓ **What you need first:**

- A maturity model assessment to evaluate automation readiness
- An implementation journey map to identify and prioritize use cases

✓ **Begin with a single process:**

- Automate your first process
- Ensure it's working
- Move on to the next use case





## ➤ What processes are good candidates for automation?



### Use Case #1: Email Management

#### Rabobank

Automated 98% of processes  
Only 2% of emails handled manually



### Use Case #2: Invoice Processing

#### North American Logistics Company

Automated 75% of invoices  
Improved quality of services  
Savings of \$75M a year



### Use Case #3: RFP Process

#### OptiMed

Automated a single proposal process  
Perfected it  
Scaled it across 15 providers

## ➤ #2: How do we talk to employees about automation?





“In the media, you see that the robots are coming to take your job. Some may be hesitant when they hear about a robotics initiative. Eventually, we see that our employees are actually very happy with the robots, because they can now focus on the real, worthy tasks.”

**Steven van Uffelen**

Lead Process Automation, Rabobank



## ➤ How to talk to employees about automation:



### **Involve employees in planning**

Start early to foster understanding and build conviction



### **Address fears directly**

As robots handle dull, repetitive tasks, employees will be free to focus on higher-value work



### **Communicate personal value**

Employees will spend less time at the office—and more time with families

**Tactics Tip:** Share fun and positive testimonial videos from employees about their experiences with Intelligent Automation.



➤ **Technology improves the quality of life for employees with monotonous jobs.**

👍 **92% of employees** report higher levels of satisfaction as a result of automation.

From: Forbes Insights: Accelerating Business Insights with Intelligent Automation, 2019



➤ **#3: How do we preserve  
our culture as processes  
and technologies change?**



## ➤ New technology may change your workflow, but it doesn't have to change your culture.

With Intelligent Automation, organizations have an opportunity to help employees learn new skills that make their jobs more interesting *and* deliver more substantial benefits to the company. Well-planned training programs also encourage acceptance and raise adoption rates—keeping culture intact.

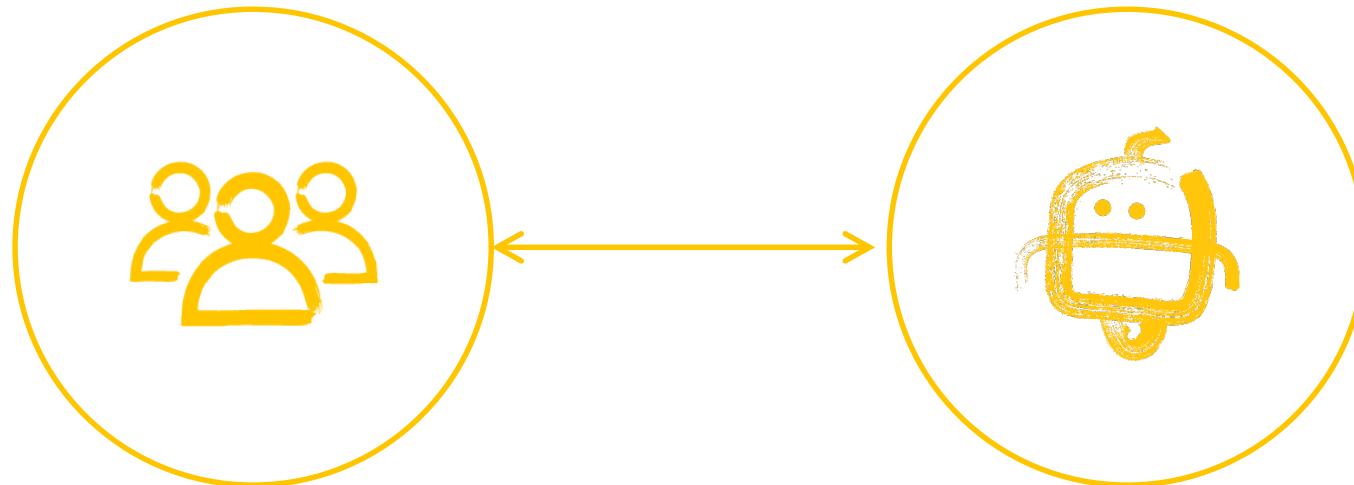


“36% of business leaders say enterprises will retrain workers to work on new business needs such as customer-facing roles or exception handling.”


HfS Research and KPMG, State of Intelligent Automation Survey, March 2019

## ➤ How to preserve culture amid change:

- The goal of intelligent automation is a balanced workforce, where robots work seamlessly alongside humans as digital colleagues.
- Let attrition guide your automation roadmap. When systems and processes reach end-of-life, it's a natural time to replace them with Intelligent Automation.







“We shouldn’t call them robots. We should call them co-bots—because what they’re really doing is collaborating with humans. They cannot do anything without human input and participation.”

**Max Cheprasov**

Chief Automation Officer, Dentsu Aegis

## ➤ #4: How do we scale beyond RPA?



## ➤ Establish a Center of Excellence (CoE).



Invite both IT *and* business owners



Be sure teams across all functions are represented



Prioritize use cases to deploy, optimize and scale

**“Only 1 in 5 CoEs have integrated IT and business owners.”**

HfS Research and KPMG, State of Intelligent Automation Survey, March 2019

## ➤ How to scale beyond RPA:

Implement process orchestration to coordinate and streamline interactions between actions, people, software robots, policies & systems. Process orchestration operates as the connective tissue needed to automate operations end-to-end.



## ➤ **Intelligent automation drives digital dexterity.**

Following these tips will enable organizations to scale and extend intelligent automation across the enterprise. As they do, they'll also increase their digital dexterity – and set themselves apart from their competition.

### **What is digital dexterity?**

- Frictionless experience
- Consumerized work environment
- Hyper-connected enterprise







“9 in 10 corporate leaders say digital is a top priority. Yet 83% of organizations struggle to make meaningful progress on digital transformation.”

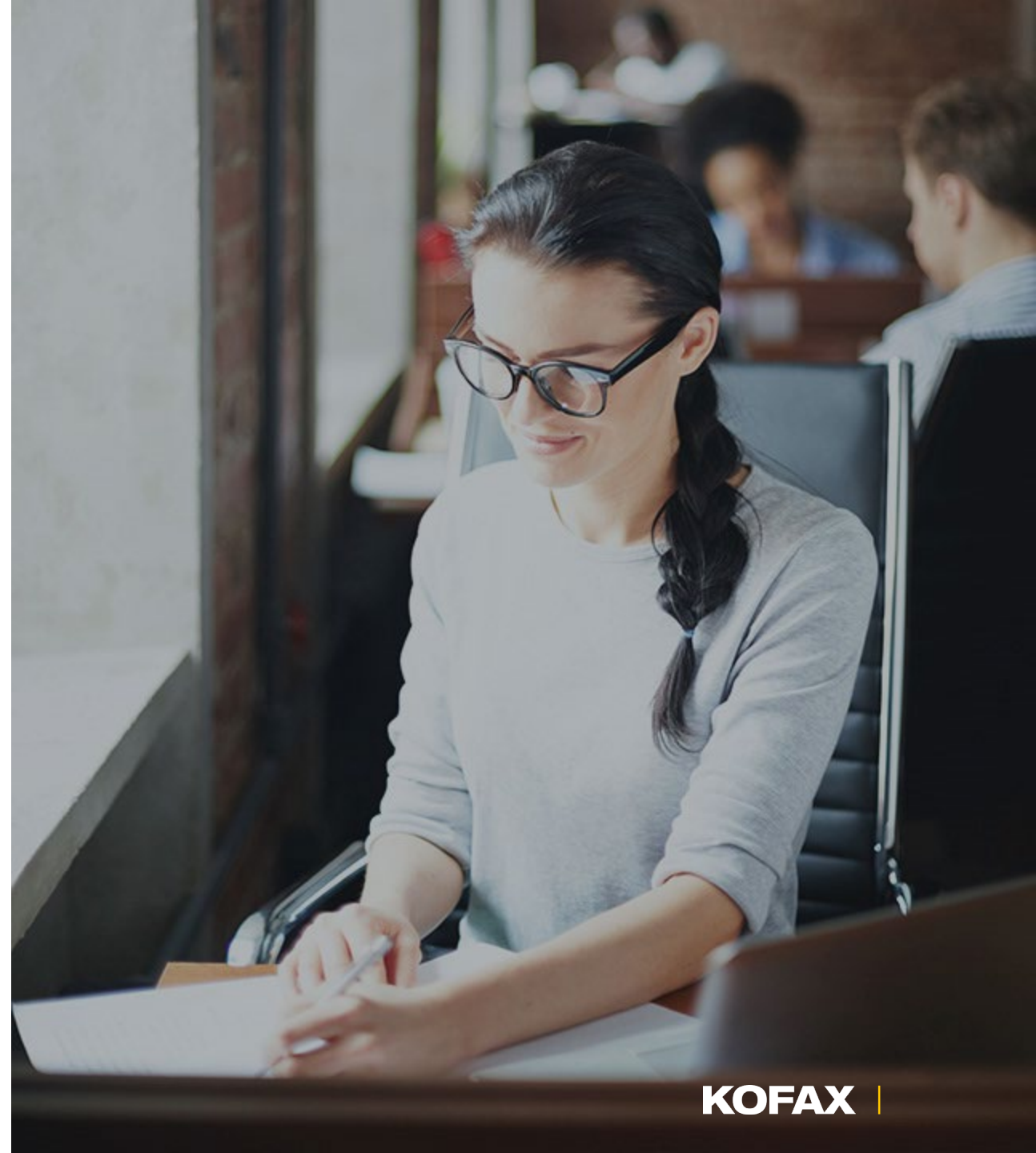
**Gartner**

Digital Dexterity at Work

## What's next?

Start thinking about the balance between empowering your human talent and automating your operations.

Download our white paper to learn more:  
[Intelligent Automation: Scaling, Expanding and Excelling](#)



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