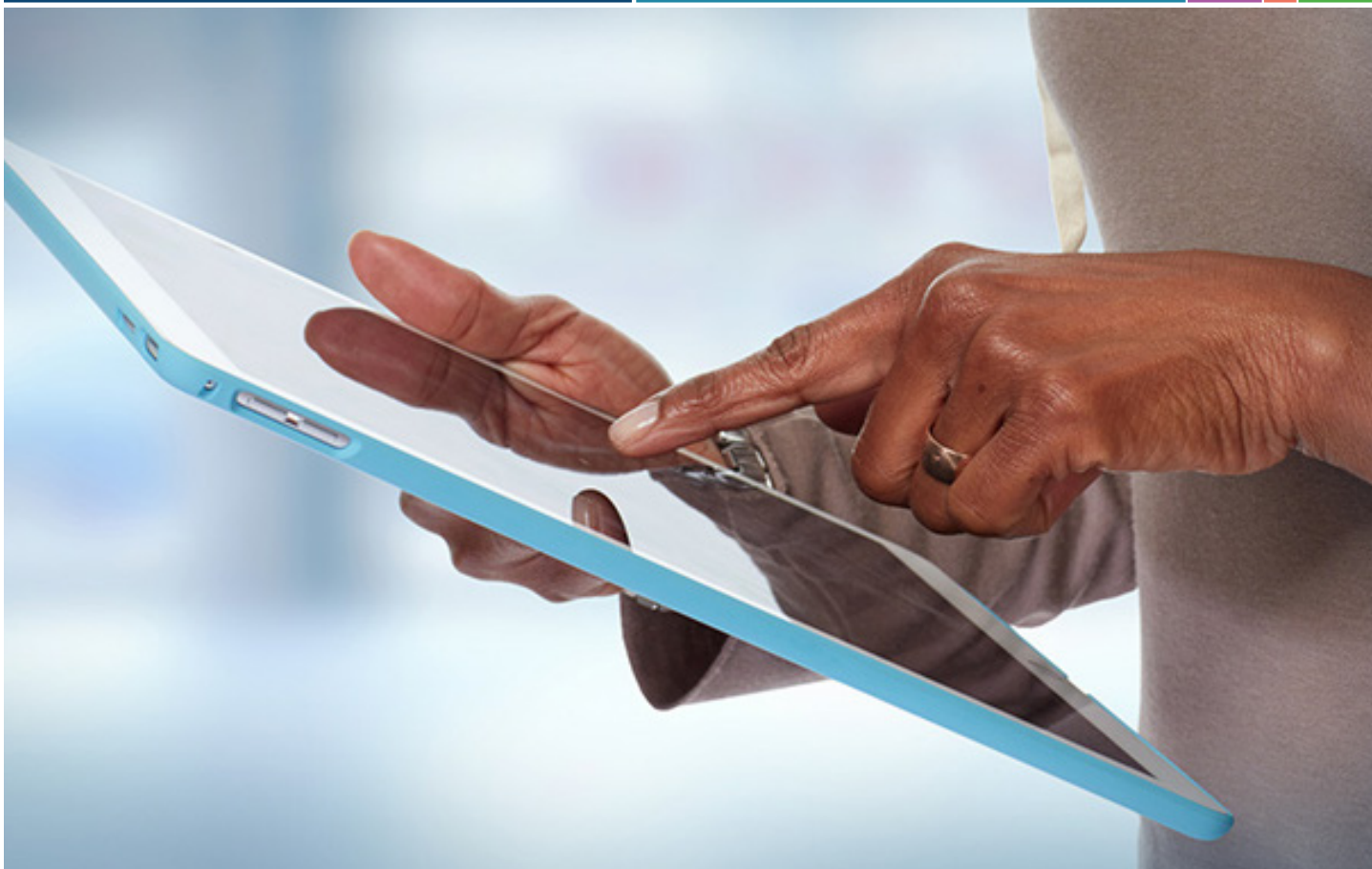


ABSTRACT

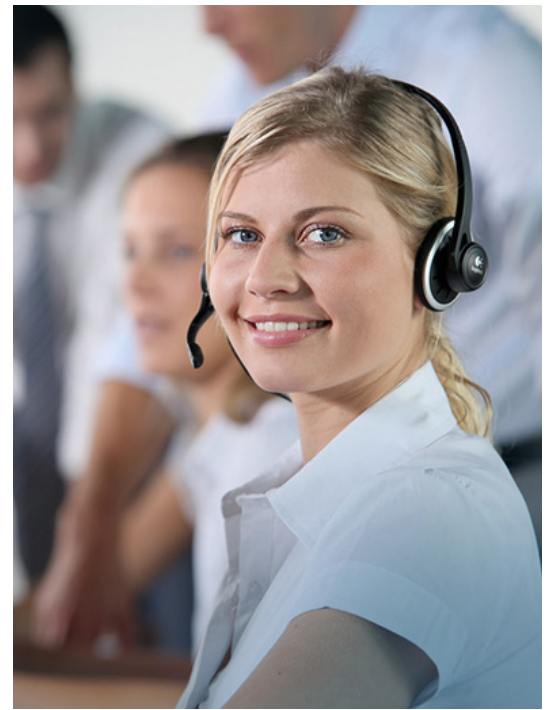


2019 - 2020 Robotic Process Automation Product and Market Report



This is the third edition of DMG Consulting's Robotic Process Automation Product and Market Report. It covers attended and unattended uses of robotic process automation (RPA) with a focus on contact center and service-related uses of this technology, as well as rapidly expanding back-office and enterprise applications. The Report provides in-depth analysis of this market, including comprehensive coverage of the competitive landscape, vendors and offerings. The detailed product comparisons and analyses presented in the Report are intended to assist companies in identifying and selecting the right RPA solutions to meet their current and future needs.

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RPA solutions are extremely compelling. They deliver quantifiable benefits for contact centers, back offices and other enterprise departments, including increased productivity, cost savings, reduced risk, improved operational efficiency, stricter oversight of internal processes, and improved regulatory compliance. However, RPA is still a relatively new IT sector. The market for RPA solutions is experiencing “hockey-stick” growth, over 100% year-over-year. As the RPA market is not yet mature, early adopters are confronted with the lack of third-party expertise and best practices to help them implement and use this technology.

RPA is being used in a hybrid staffing mode, where the technology works “side by side” or as a virtual “assistant” to humans. RPA solutions can assist by looking up information in a knowledge base, auto-completing forms with data obtained from internal or external sources, and much more. It can also fully automate processes that do not require human cognitive capabilities, freeing workers to perform more interesting and rewarding tasks. These automated capabilities are changing the responsibilities of employees and the dynamics of contact centers and back office functions, for the better.

RPAs are proliferating throughout enterprises, but it is very difficult to find skilled resources outside of vendors to build and manage these solutions; organizations need to engage professional services firms or develop the talent internally. It is a best practice for companies to create training programs for their staff to learn how to develop and maintain RPA solutions, as they transition to a more automated workforce. This opens up new opportunities for workers currently employed

throughout an organization, and they should be encouraged to interview for new positions at all levels of RPA management.

RPA automation is here to stay, and human employees feel threatened by the rapid emergence of the automated workforce. Employee engagement and morale are at risk. Companies must allow adequate time to get their staff on board with RPA. This will go a long way to speeding up the success and benefits of RPA initiatives. Companies are encouraged to build Centers of Excellence (CoEs) and training programs to improve and extend the usefulness of their organizations’ human capital in this age of artificial intelligence.

The RPA vendors are experiencing growing pains in this rapidly expanding market. Overwhelmed with demand for these valuable solutions, they are struggling to keep up with customer demands and expectations. There is a major opportunity for the vendors to improve training and to make their solutions easier to use.

The *2019 – 2020 Robotic Process Automation Product and Market Report* provides the most detailed and timely analysis of the overall RPA market, competitive landscape, technology, products, functional capabilities, and the servicing and market trends that are driving adoption and innovation. The Report features 4 vendors who offer solutions that address service, contact center, back-office and other enterprise uses: Jacada, NICE, UiPath and Verint. One additional vendor, OnviSource, is covered at a high level.

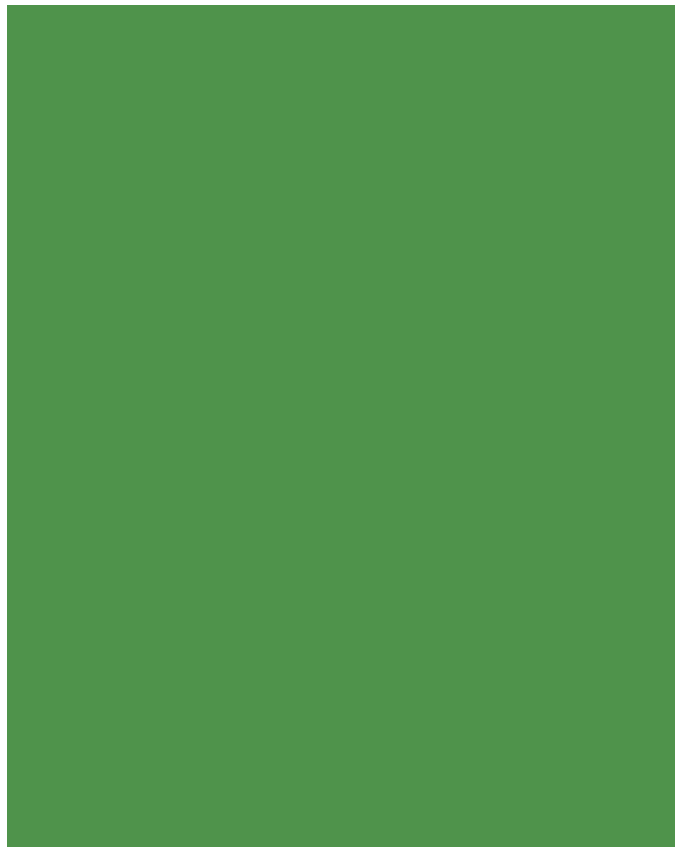
Key Reasons to Buy this Report

- ⇒ Definition of RPA, including attended and unattended automation and a high-level overview of the underlying technical components
- ⇒ Examination of the top contact center and enterprise uses of RPA
- ⇒ Market trends and challenges that are driving interest, investments and innovation in this sector
- ⇒ RPA vendor innovation and near-term roadmap, including new product features and what is planned to be delivered in the next 12 – 18 months
- ⇒ Insightful discussion of the impact of RPA on the agent's role and contact center staffing
- ⇒ Examination of how attended automation is being leveraged to reduce agent and customer effort and improve service quality and the customer experience
- ⇒ Review of how unattended RPA works in the background to automate some or all steps of a process or workflow
- ⇒ RPA competitive landscape, including the technology sectors that are developing RPA solutions and an overview of the RPA vendors and product offerings covered in the Report
- ⇒ RPA vendor market activity and 5-year projections
- ⇒ Detailed functional and technical side-by-side comparative analysis of the functional and technical capabilities of the 4 featured RPA solutions
- ⇒ Implementation analysis, including vendor methodology, best practices, professional services, training, maintenance and support
- ⇒ RPA benefits and return on investment (ROI) analysis
- ⇒ Review of RPA vendor pricing structures
- ⇒ Results of DMG's comprehensive customer satisfaction survey, which ranks vendors based on customer satisfaction across 8 product components, 8 effectiveness categories and 10 vendor categories
- ⇒ Detailed company reports for the 5 RPA vendors covered in this Report, analyzing product functionality and near-term product roadmap deliverables
- ⇒ Comprehensive RPA Vendor Directory



Report Highlights

- ***RPA is delivering on some of the most important servicing goals throughout enterprises:*** RPA is helping organizations improve productivity, reduce costs, mitigate risk, improve operational efficiency, oversee internal processes, and improve regulatory compliance. These automated tools can also help to reduce systems and IT developments costs and extend the life of applications throughout the enterprise.
- ***The RPA sector is growing at a very rapid rate:*** The RPA market is experiencing “hockey-stick” growth, expanding by over 100% during the past year. DMG expects this remarkable rate of adoption to continue for the next few years, as many opportunities remain for organizations to benefit from this automation.
- ***The rapid expansion of the RPA market is accompanied by growing pains:*** RPA vendors are facing extraordinary demand for their products and support services. One of the biggest opportunities is in the area of training. Customers are looking to their vendors for guidance, professional services and best practices to succeed with their RPA initiatives.
- ***A hybrid workforce is the new staffing paradigm:*** Humans and automated “assistants” are working side by side to complete tasks and, in some cases, fully automate work that does not require the cognitive capabilities of human employees. Attended and unattended automation are improving the dynamics of the contact center, helping employees improve their productivity and freeing them to perform more rewarding work.
- ***Enterprises need to address their staff’s fears about being replaced by automation:*** Automation in the workplace is here to stay. Companies need to get their staff on board with RPA initiatives. One way to accomplish this is for companies to create new job functions for current employees to maintain and oversee the day-to-day functions of their robots. A Center of Excellence within an enterprise can help develop the training programs to address the new skills that employees need.



Robotic Process Automation (RPA)

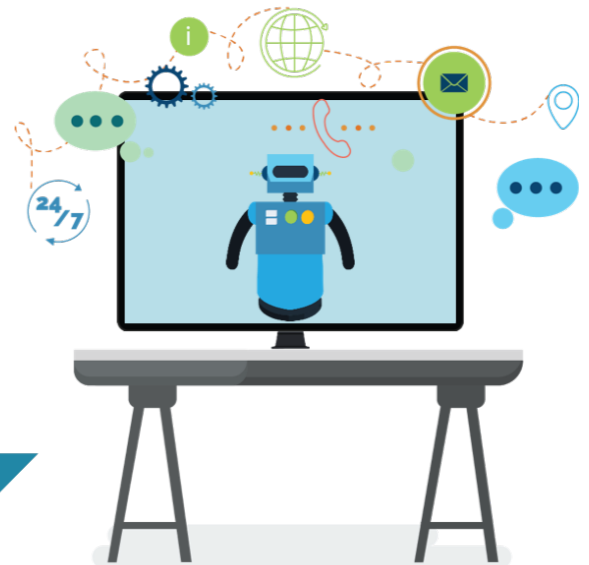
Attended Automation

Automates single-dimension tasks
Provides real-time process guidance/next-best-action



Unattended Automation

Automates high-volume end-to-end processes
Provides alerts for anomalies



Output

Improved accuracy
Increased productivity

Decreased handling time
Improved compliance
Improved service consistency

Improved customer experience
Improved employee satisfaction

Source: DMG Consulting LLC, September 2019

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