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**Forward** |||

## Meet your speaker



**Craig Le Clair**

Vice President

**Forrester**





# Making Work *Work* for Everyone in the Automation First Era

Craig Le Clair VP, Principal Analyst

# RPA Success Points



Culture, Skills,  
& Leadership



Human In The  
Loop



RPA Plus AI  
Orchestration



Lower Total Cost  
Of Ownership

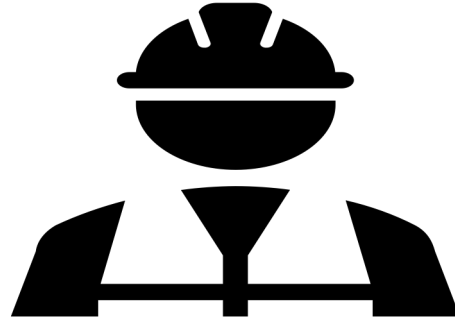


Automation Strike  
Teams



Desktop Analytics  
And Process

# But Here's The Big One



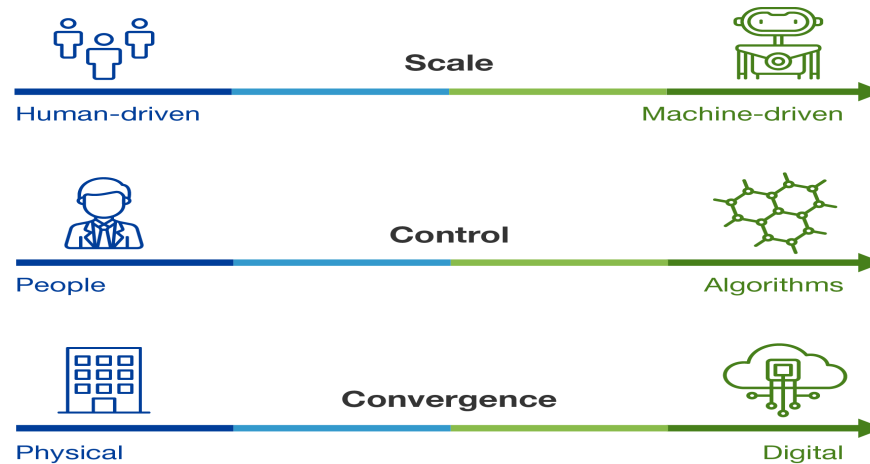
Future Of Work

# Automations Impact Is Profound

FORRESTER RESEARCH

## Shifts In The Three Forces Of Automation Will Transform The Workplace

*Reinventing Work In The Era Of Automation*



144131

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# Employees aren't ready for the revolution

**Only 21%**

**I know when to question the results of an automated technology**

**Only 18%**

**I have a sense of my career path in a world of automation**

**Only 25%**

**Robotic technologies replacing some human activities will impact me positively**

**51%**

**I fear losing my job due to automation at some point**

**Base: Global Information Workers**

# But also: Organizations aren't ready, either

**Only 19%**

Someone at my company could complete analysis for the automation process

**Only 15%**

We have an Automation Center of Excellence

**Base: Global Information Workers**



# And finally: Leaders aren't ready

**Only 20%**

**My company has clearly articulated how different automation technologies can help us reengineer our current business processes**

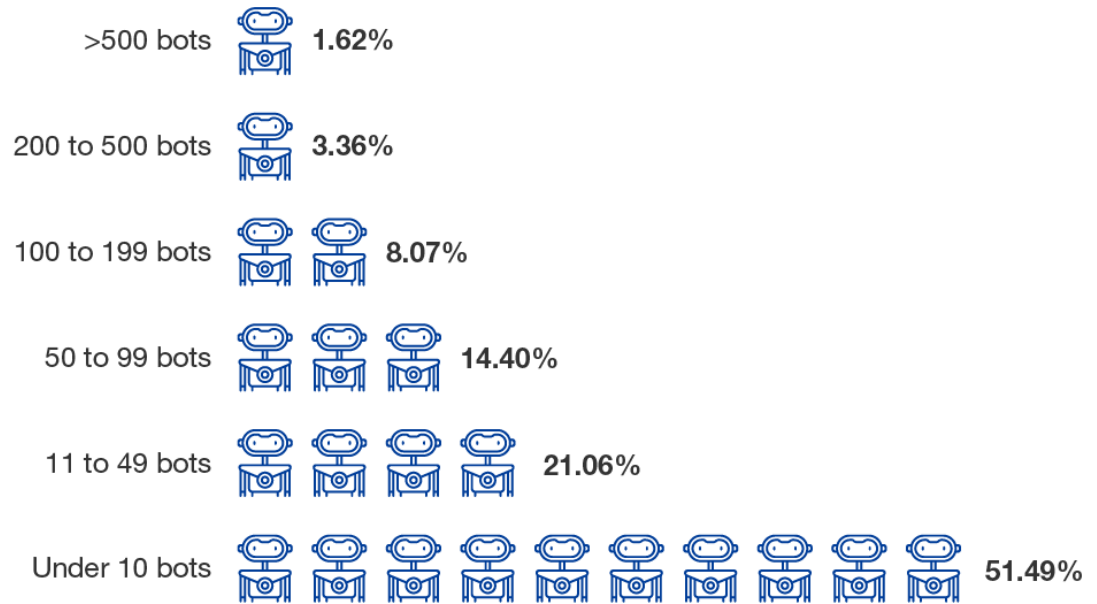
**Only 25%**

**My company's leaders communicate honestly and empathetically with employees**

**Base: Global Information Workers**

# Scale continues to be a major hurdle for over half of enterprise RPA programs

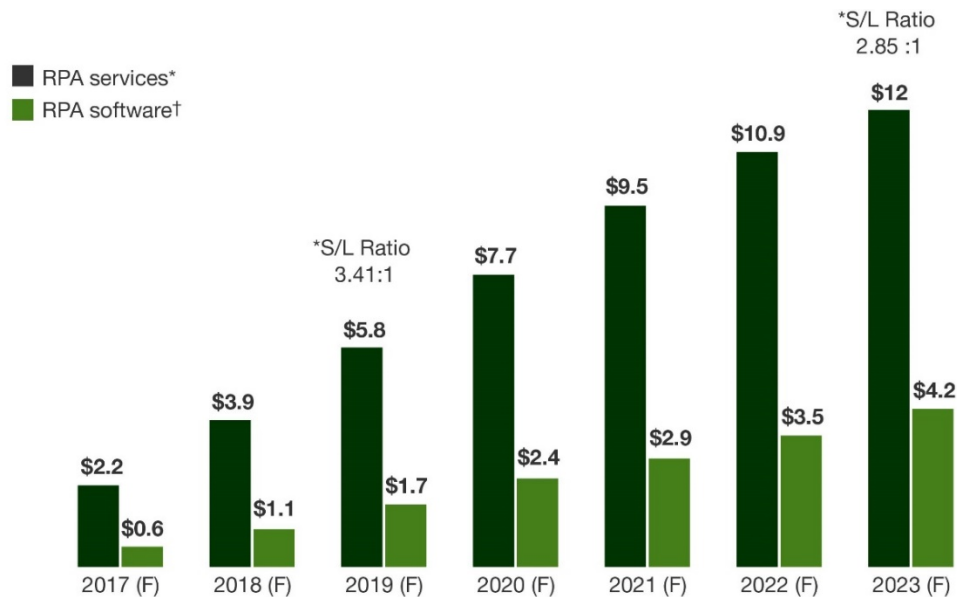
## Bot distribution by clients



Source: Forrester's Q2 2019 Robotic Process Automation Services Forrester Wave™ Online Survey (Global)

Source: Forrester report, RPA Services Market To Reach \$12 Billion By 2023"

# Task Automation Has Hit An Enterprise Gap



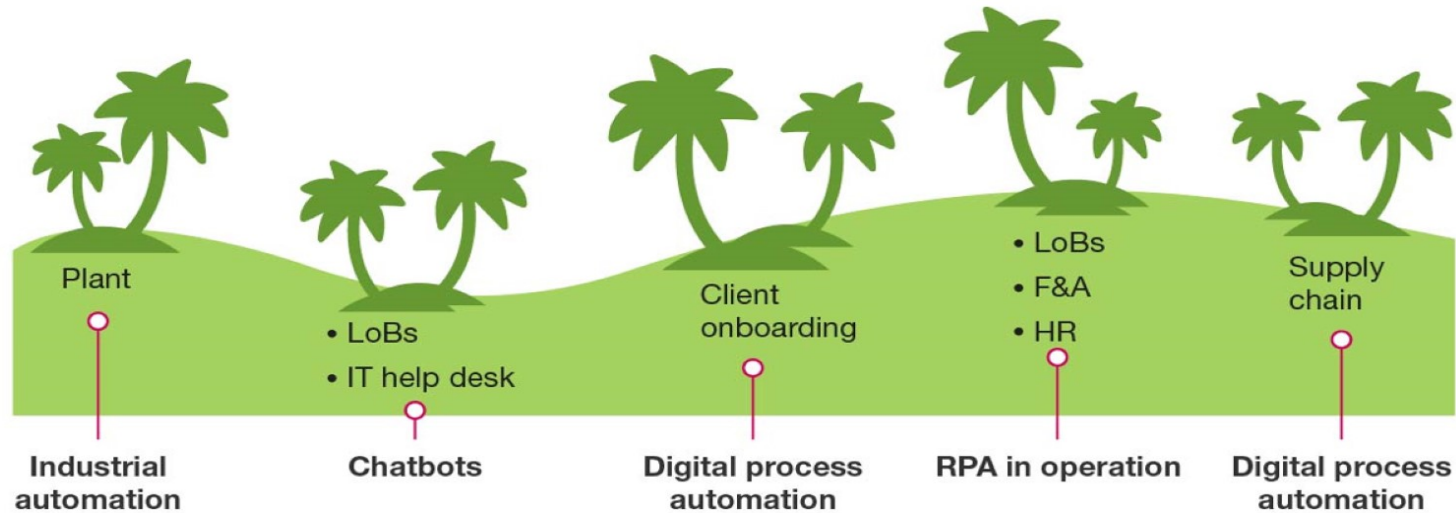
## RPA Software and Services Market Growth

Base: 5,800 customer deployments of 25 global robotic process automation service providers

Source: Forrester's Q2 2019 and Q1 2017 Global RPA Services Forrester Wave™ Online Survey

\*Services to licenses ratio

# RPA Plus AI Orchestration Will Manage Islands Of Automation

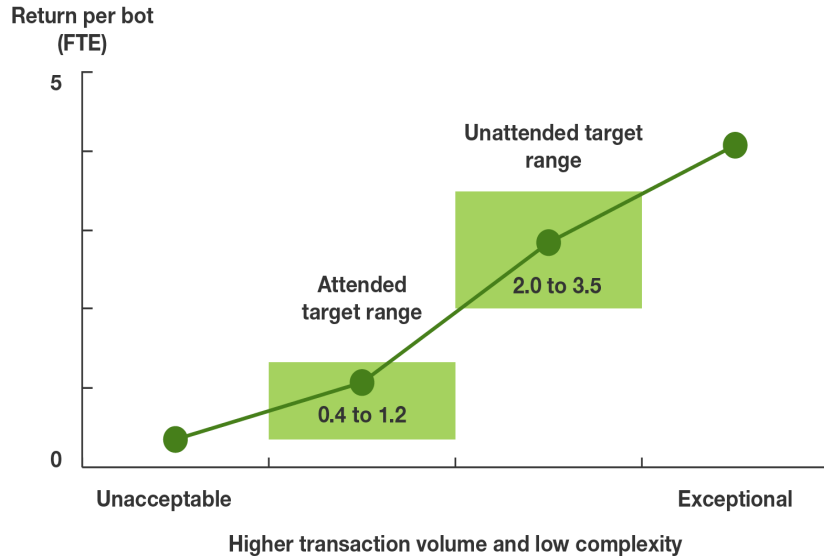


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# For Many The Automation Journey Starts With Task Automation With RPA

Volume and simplicity drive the offset of full-time employees (FTEs)



› Attended RPA is defined as:

*“Automation that interacts in real time with humans who initiate and control robot tasks, often embedding functions within apps., generally associated with front-office, agent-led activities.”*

› Unattended RPA is defined as:

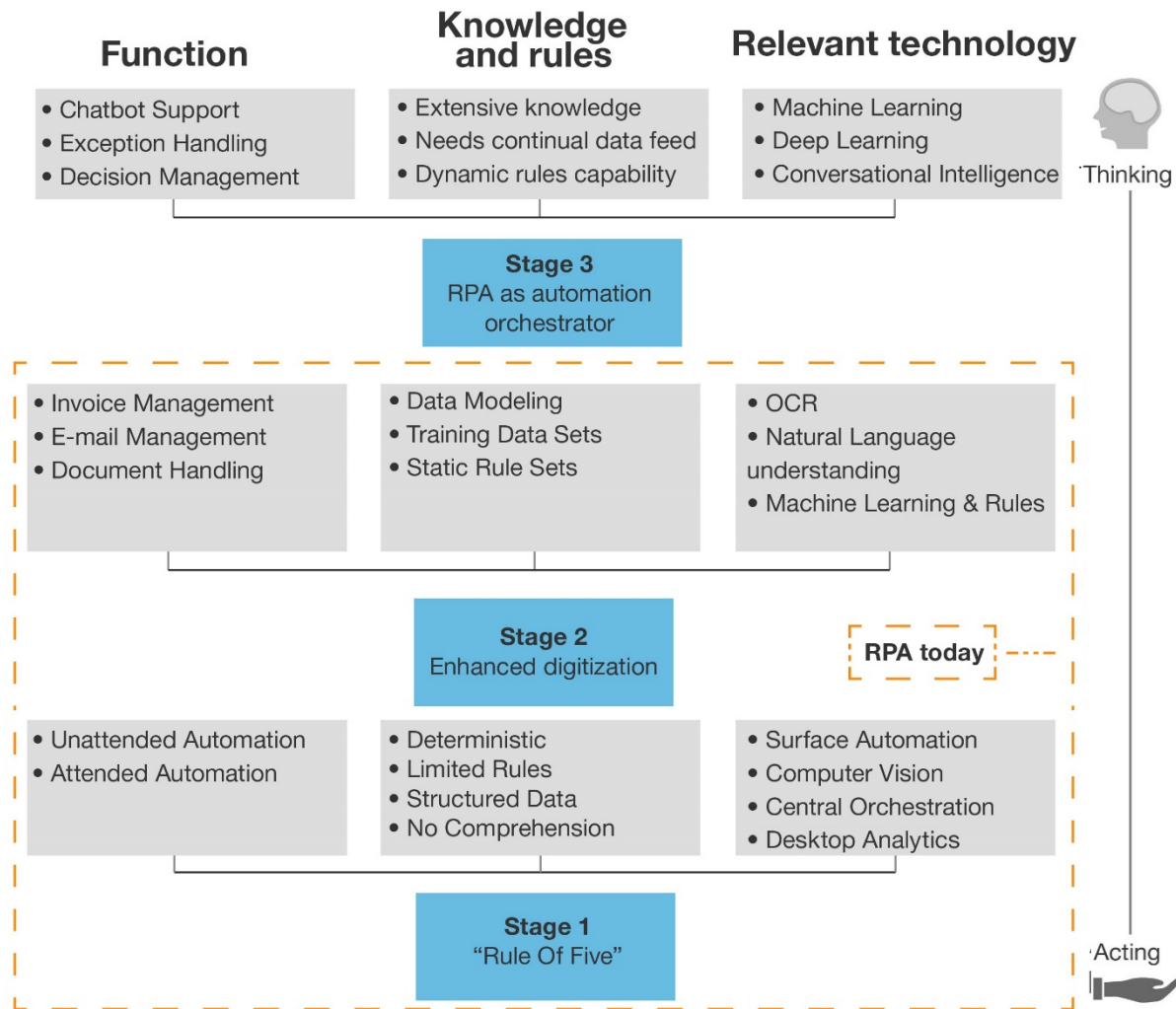
*“Automation that replaces a complete human function in a ‘lights-out’ ‘batch-oriented’ manner, creating a virtual workforce, generally associated with back-office activities.”*

# Follow the “Rule of Five” for RPA Success

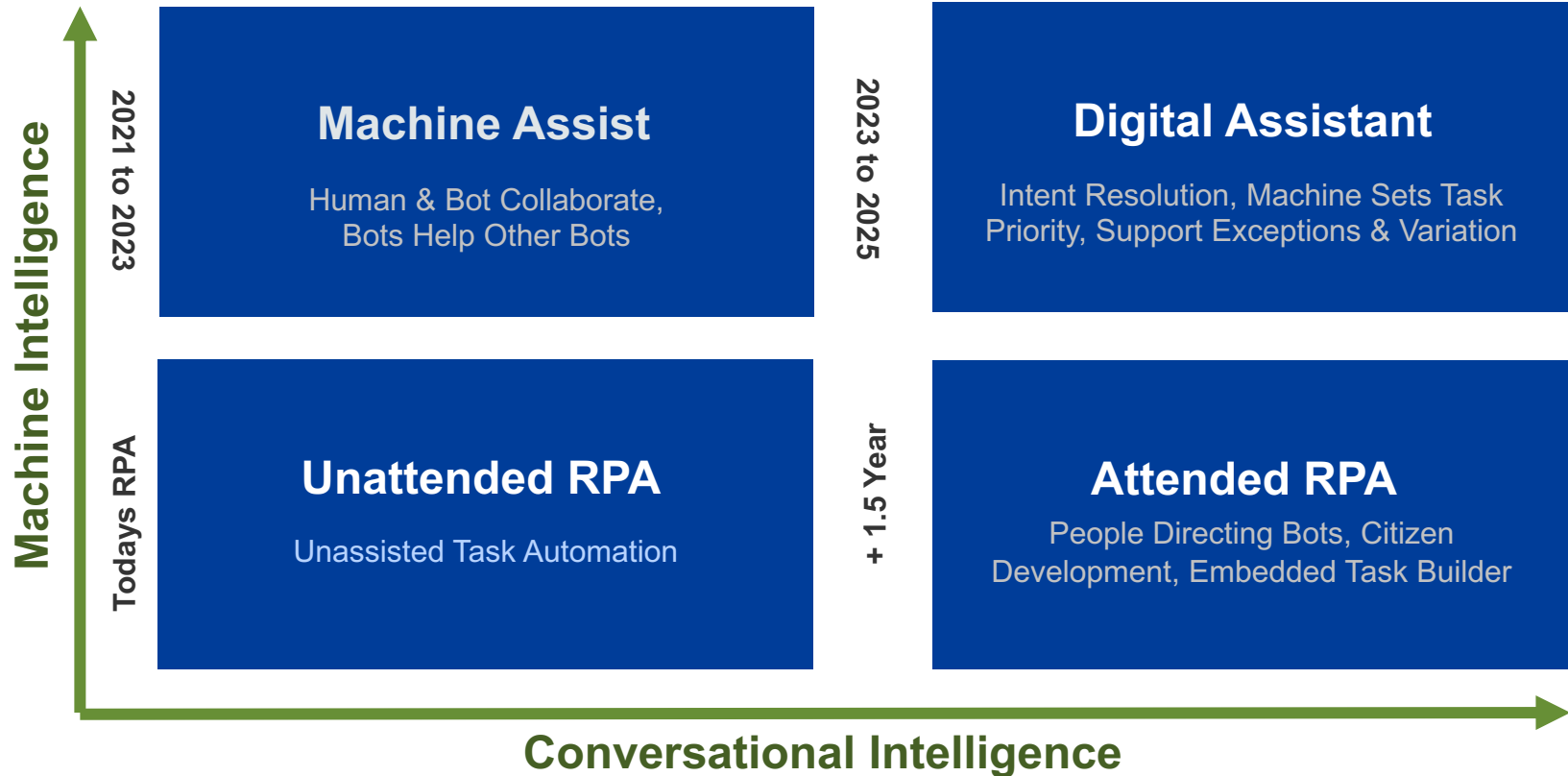
Less Than **5** Decisions Made

Less Than **5** Applications Accessed

Less Than **5** Hundred Clicks

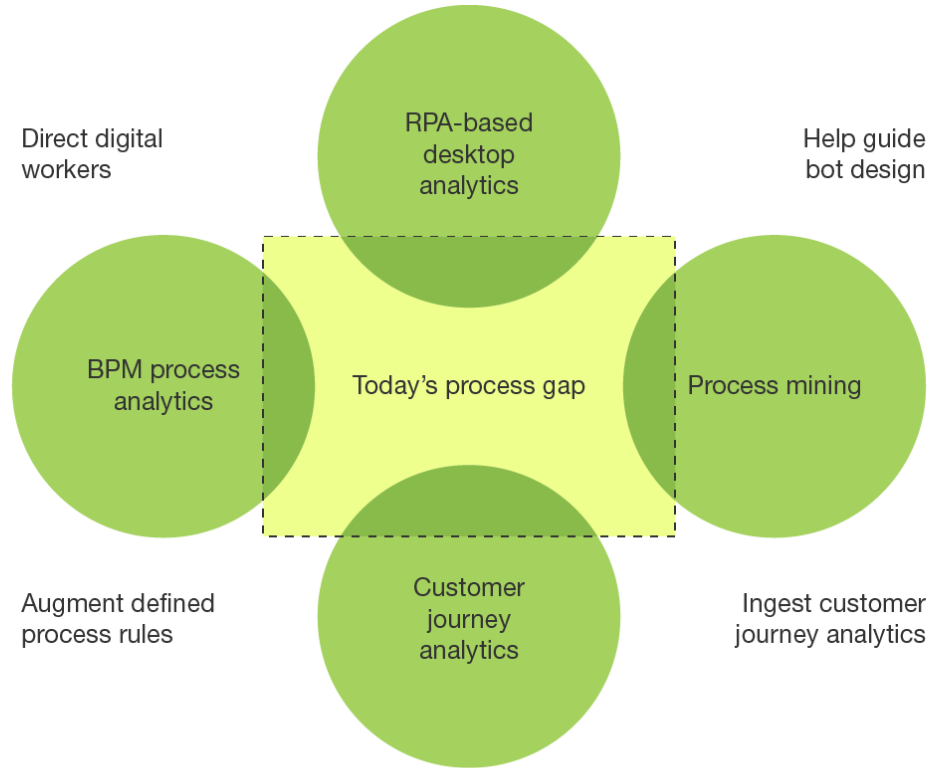


# Keep The Human In The Loop With The Progression Of Robot Sophistication





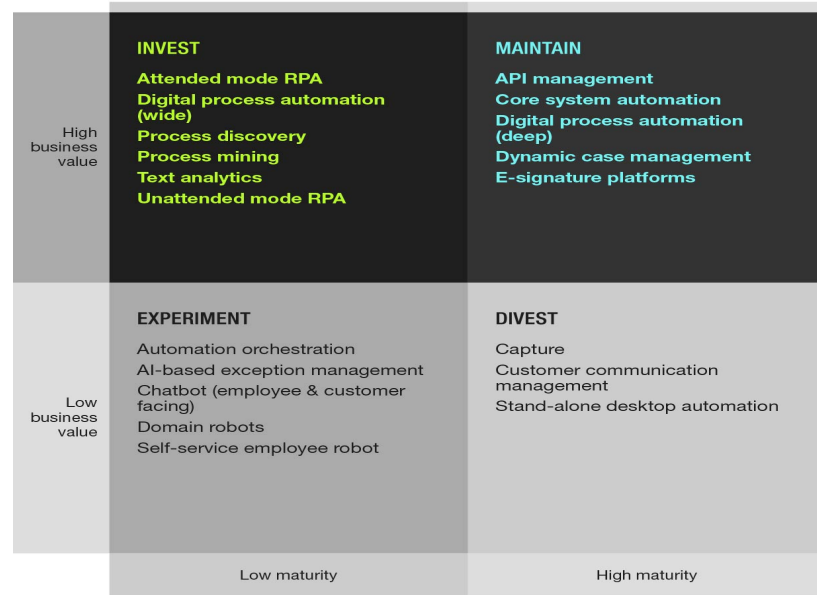
# Better Process Understanding Is Required



# Segments Of The Intelligent Process Automation Market

TECH  
TIDE

Intelligent Process Automation  
Q4 2019



156357

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# Were Going To Talk About The Robots You Can't see





Bagged  
Cereal

Cake  
Decorating

Bossa  
Nova

Walmart

# Not just physical robots

Automation

**45%**

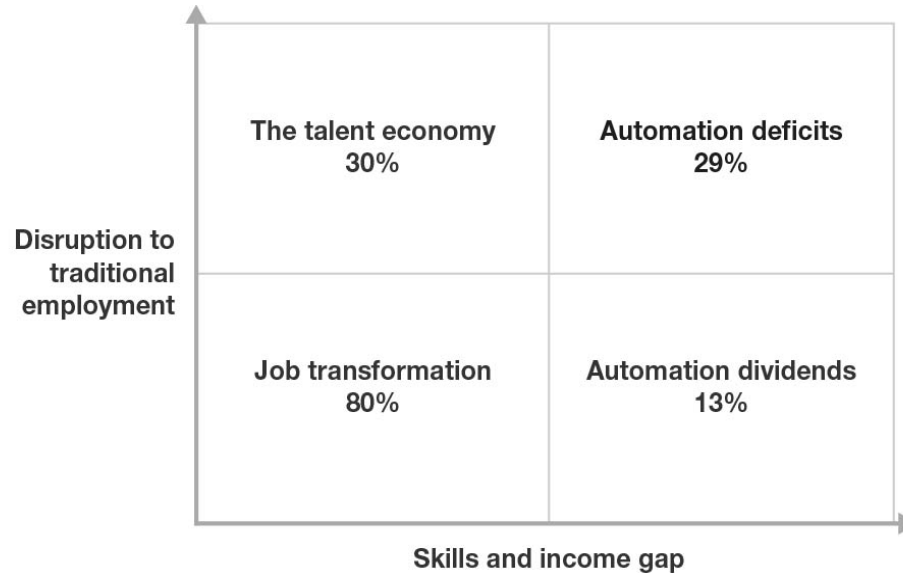
Implementing or expanding  
Robotic Process Automation (RPA)

AI

**43%**

Implementing or expanding  
executable AI

# And Here's What We Think The future Of Work Looks Like In 2030



Source: Forrester forecasts

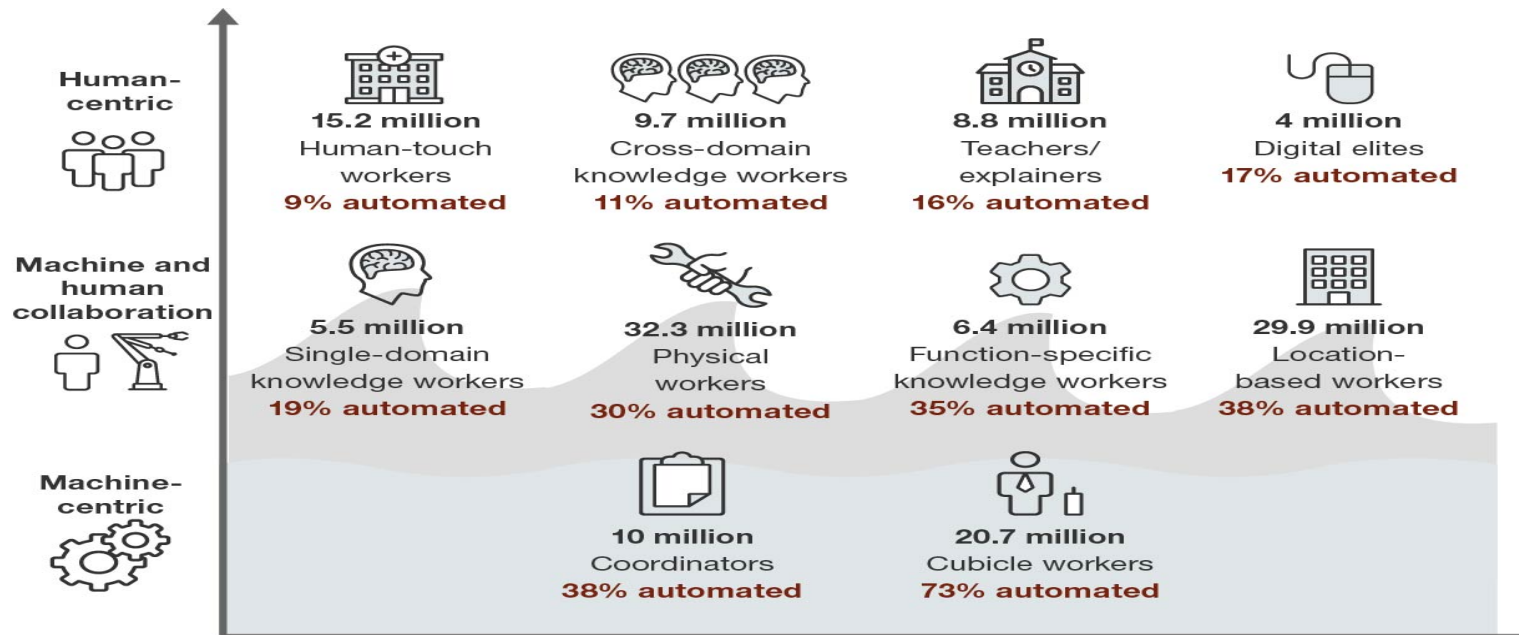
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# Twelve Personas Can Describe The Workforce

Trend		Number of occupations	Number of US workers	Automation status
↑	Human-touch workers	76	15,196,250	Above the water line
↑	Cross-domain knowledge workers	92	9,668,290	Above the water line
↑	Teachers/explainers	64	8,844,680	Above the water line
↑	Digital elites	20	4,000,720	Above the water line
↓	Single-domain knowledge workers	41	5,533,780	Water is creeping up
↓	Physical workers	288	32,271,040	Water is creeping up
↓	Function-specific knowledge workers	50	6,357,980	Water is creeping up
↓	Location-based workers	70	29,937,620	Water is creeping up
↓	Coordinators	36	9,997,250	Under water soon
↓	Cubicle workers	72	20,676,290	Under water soon
↑	Mission-based workers*			Evacuees
↑	Digital outcasts*			Evacuees



# Focus On The Invisible Robots That Are Transforming The Workplace



The water rises as automation handles greater context and variability

Note: Numbers of workers are totals for today's workforce. The percent automated includes the deficits or jobs removed from the workplace by 2030. Automation dividends will offset these percentages.

Source: US Census Bureau annual projections for the US up to the year 2030 and US Congressional Budget Office labor-force participation-rate projections for the US up to the year 2030; automation percentages are Forrester forecasts.

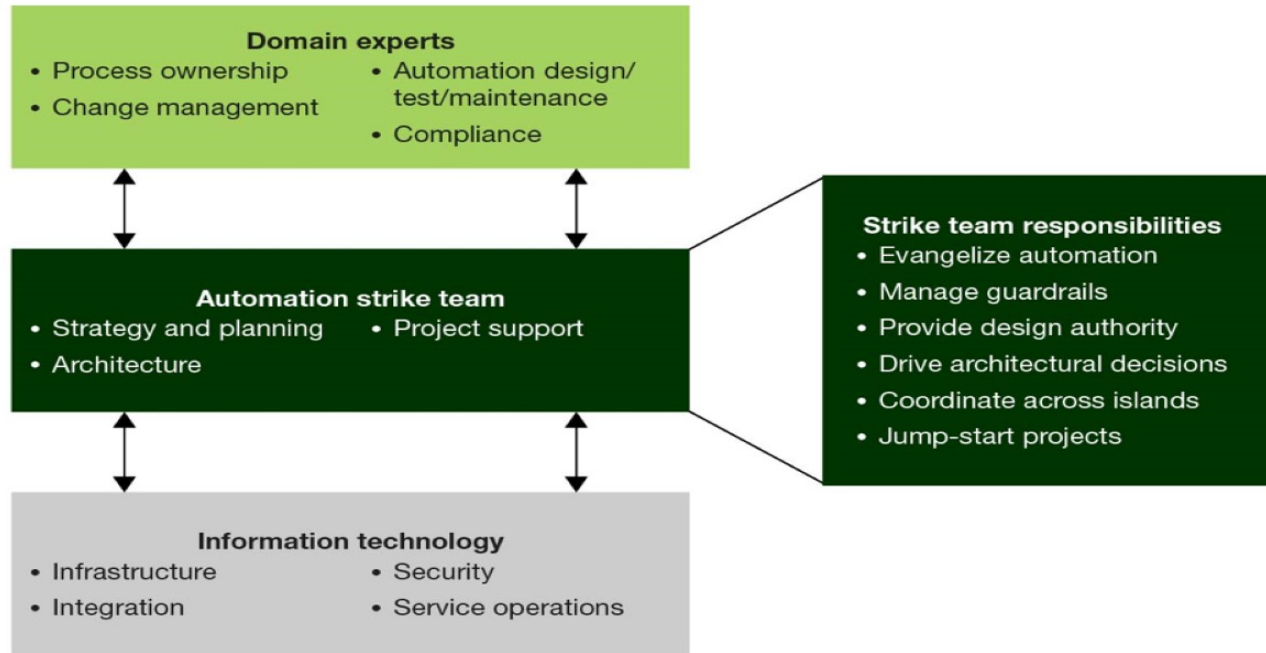
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A solid green triangle pointing downwards from the top-left corner of the slide, extending diagonally across the upper portion of the frame.

And Here's What We  
Should Do About It .

# Build Your Automation Strike Teams



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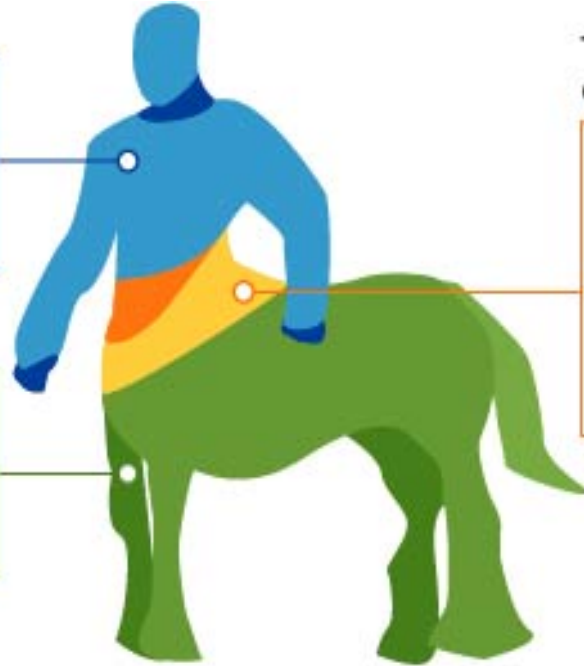
# Let's Use Automation Where It Works Best

## The head - human strengths

- Conversational Intelligence
- Collaboration
- Connecting ideas
- Sentiment

## The body - machine strengths

- Machine learning
- Knowledge retrieval
- Text analytics
- Repetitive task execution



## The middle - human/machine collaboration

- AI ethics
- Machine training
- Stress monitoring
- Knowledge curation
- Bias assessment
- Machine risk management
- Explainability

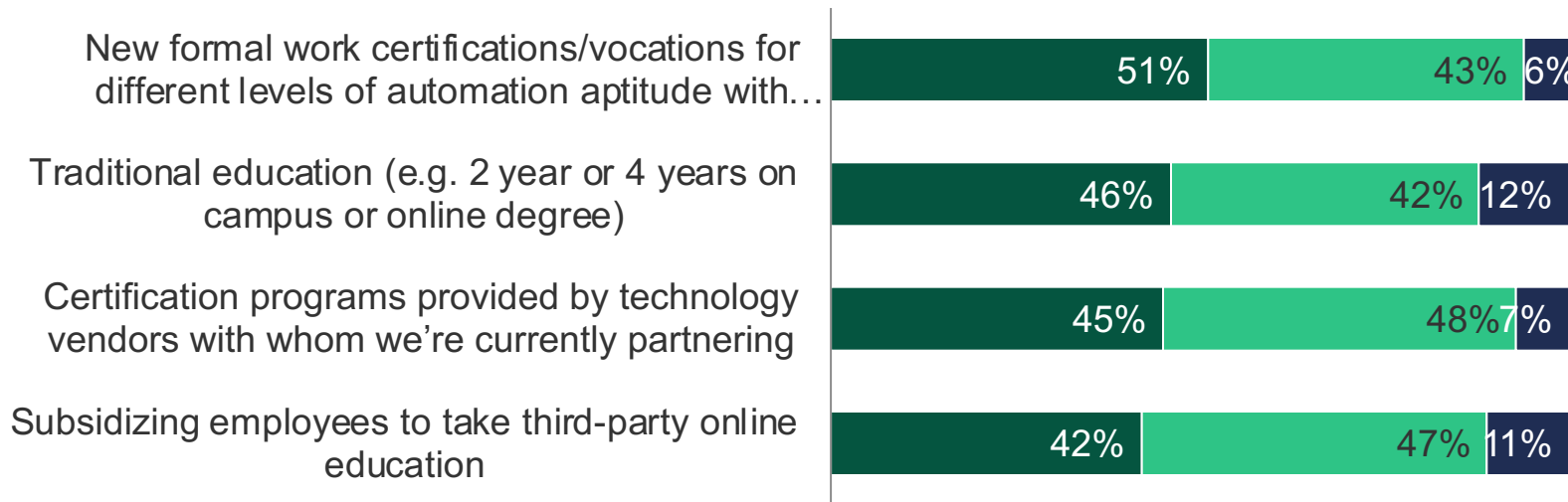
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# New Formal Work Certifications Are Expected To Have The Greatest Beneficial Effect In Dealing With Automation Skills Gap And Anxiety

“Please rank the education approaches below in terms of how effective they are at dealing with previous workplace automation issues (i.e., skills gap, anxiety, technology refresh cycles.)”

■ It will have major beneficial effects

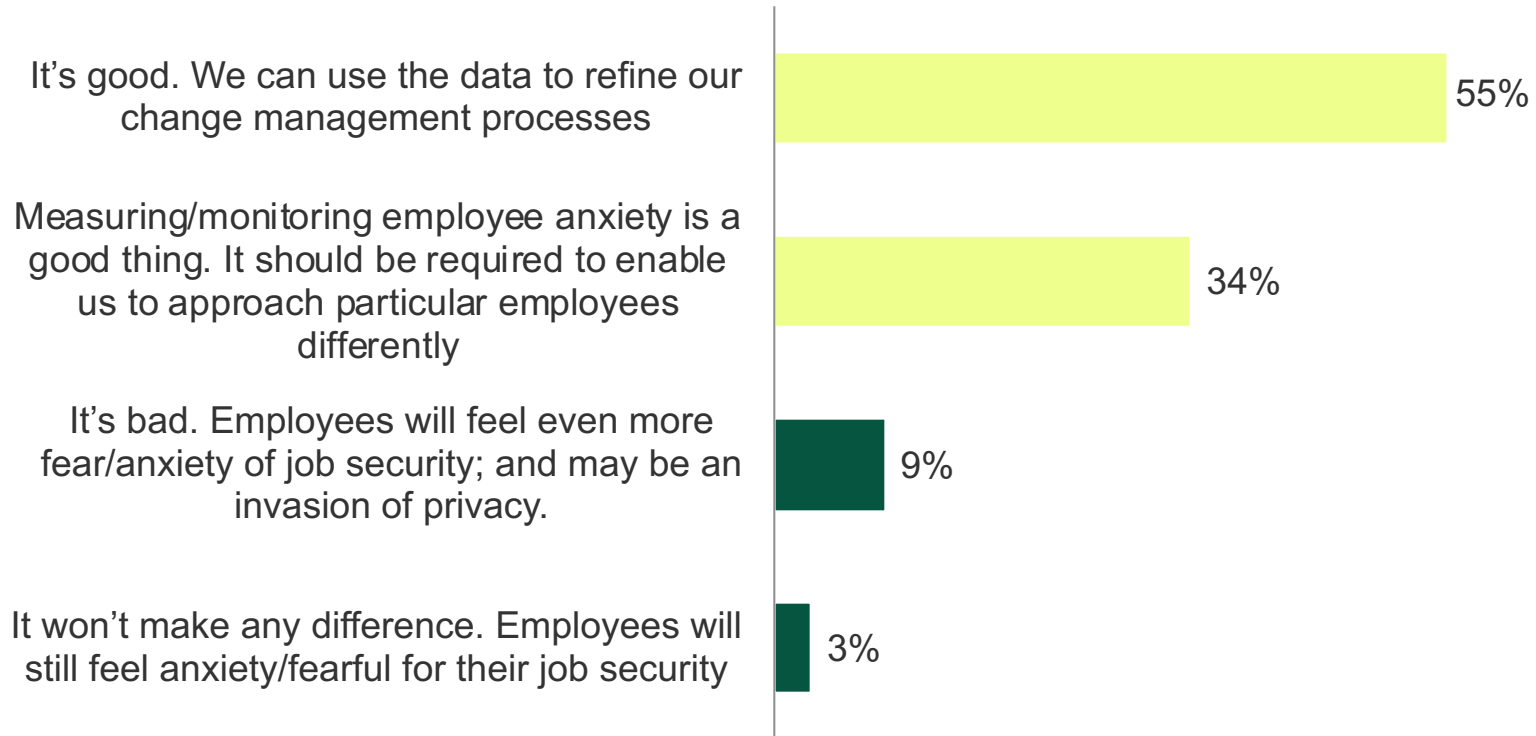
■ It will have some beneficial effects



Base: N116 Manger level and above from operations groups, shared services, finance and accounting and other core business lines

Source: A commissioned study conducted by Forrester Consulting on behalf of UiPath, October 2019

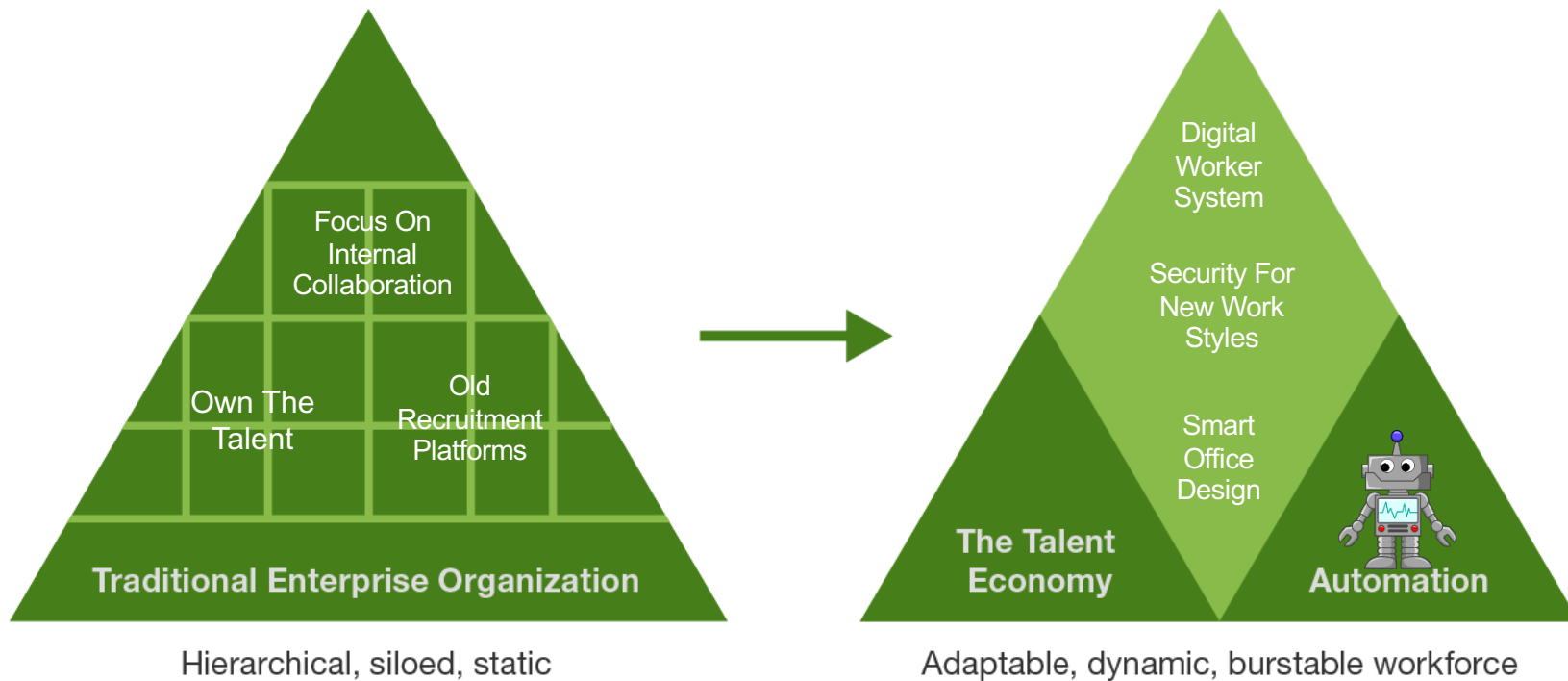
# Enterprises Feel That Monitoring Employee Anxiety Is A Good Thing



Base: N116 Manger level and above from operations groups, shared services, finance and accounting and other core business lines

Source: A commissioned study conducted by Forrester Consulting on behalf of UiPath, October 2019

# Prepare For A More Adaptive Workforce



# Key Takeaways

- Consider the Future of Work a strategic competency
- The future of work is something you and your leaders will create.
- There is opportunity – and challenge – associated with it, but it's ultimately valuable.
- You can change the way you serve customers – for the better – by investing in the future of work.
- You can also make your own jobs easier by dividing labor.
- Making humanness a strength is key. Employee experience is key.

# FORRESTER®



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# Thank you

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