



# 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?

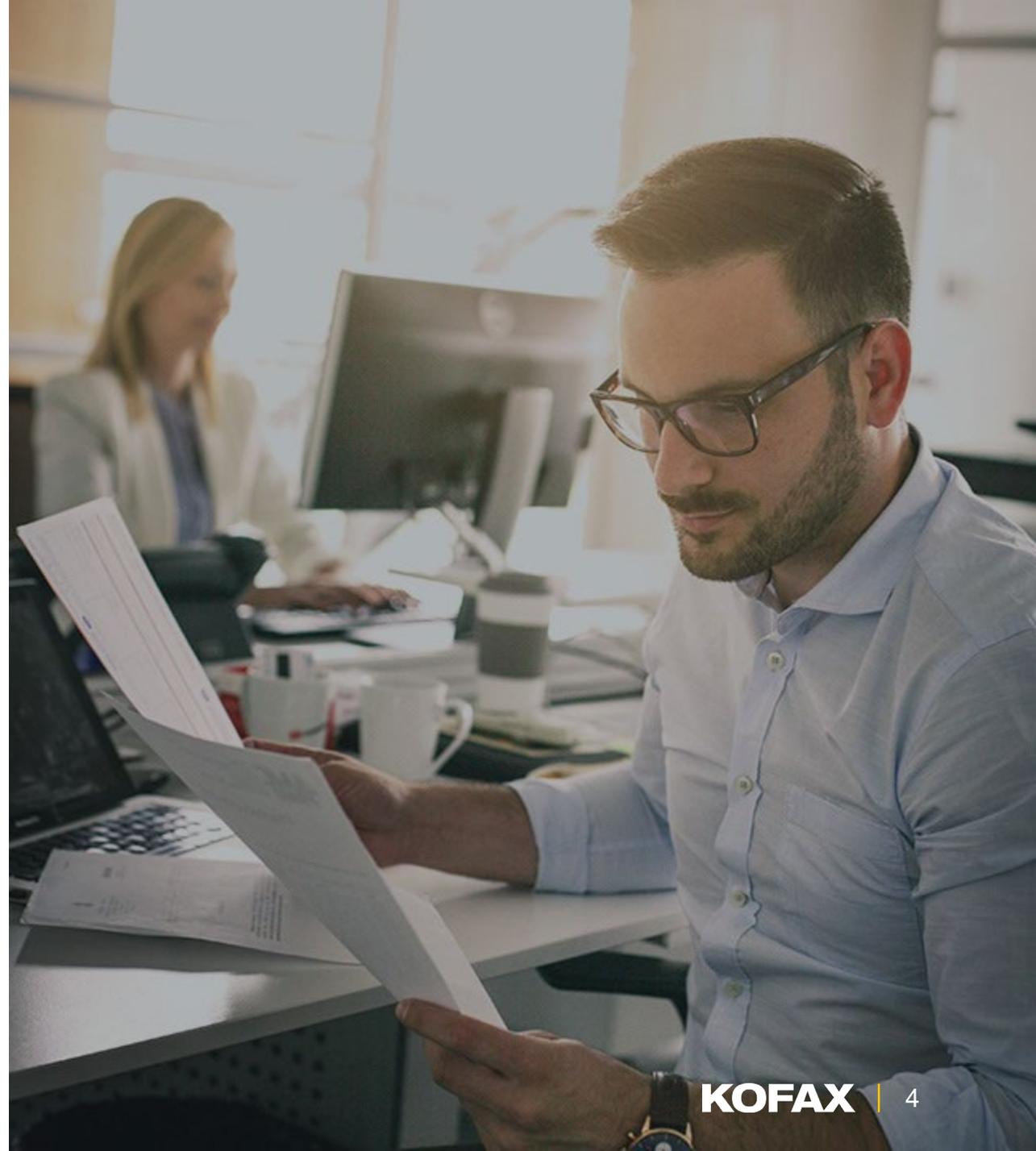


How do we preserve our culture as processes and technologies change?



How do we scale beyond RPA?

 **#1: Where do we start?**



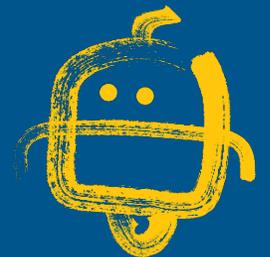
➤ **Create a strategy, but execute in phases.**

✔ **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.

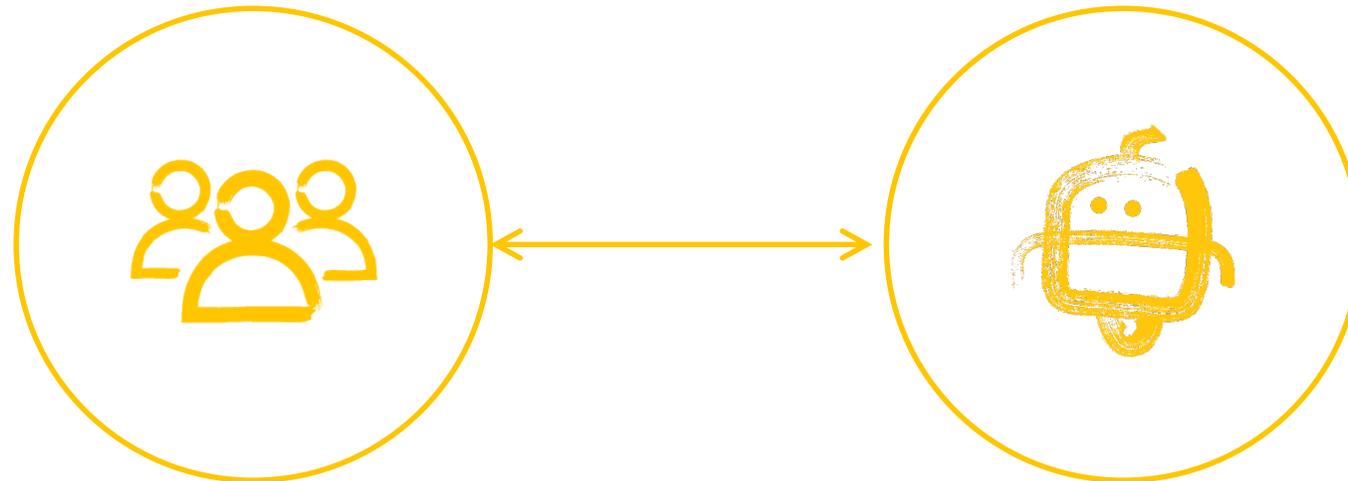


“36% of business leaders say enterprises will retrain workers to work on new business needs such as customer-facing roles or exception handling.”

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.

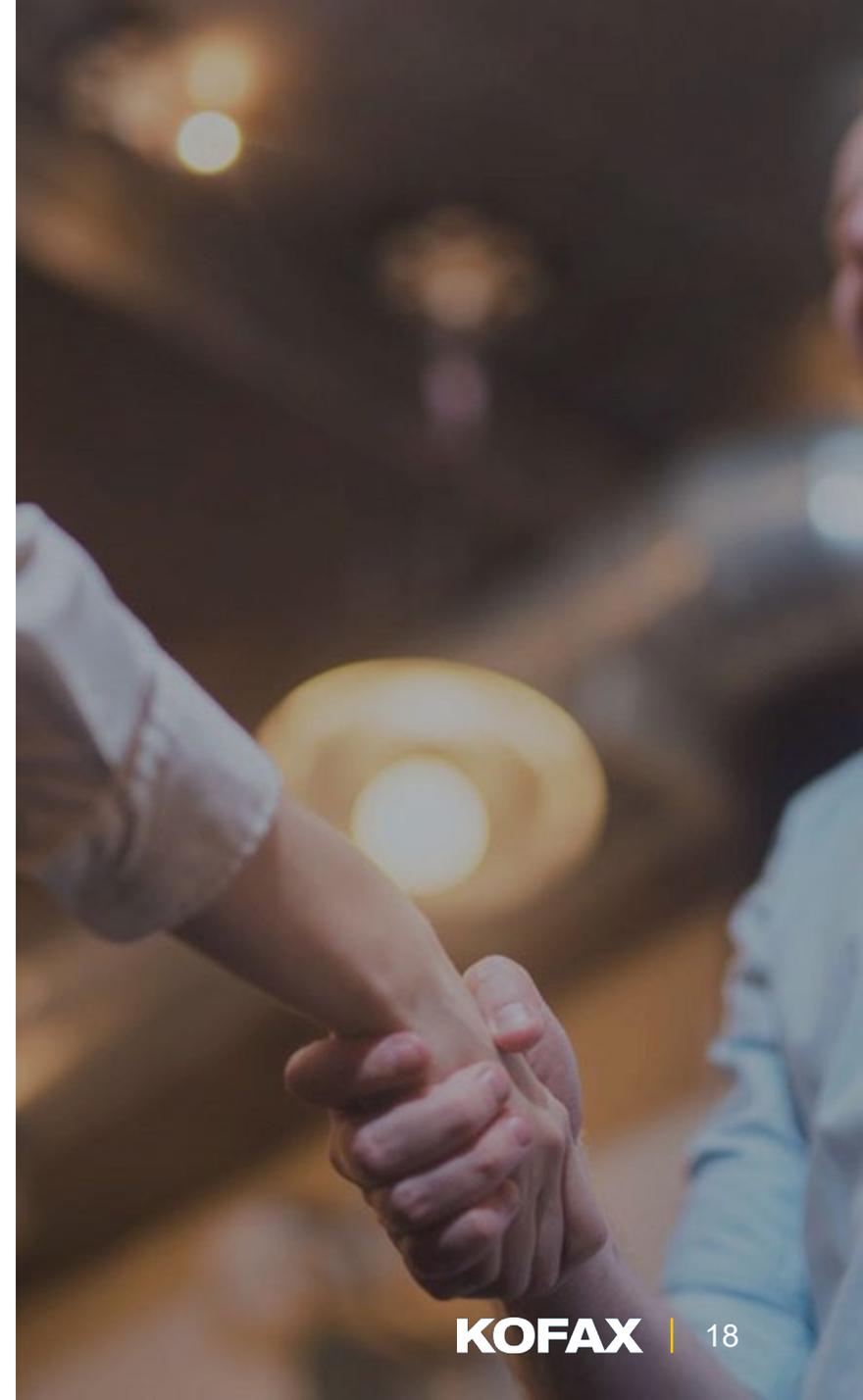


## Intelligent automation drives digital dexterity.

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.”

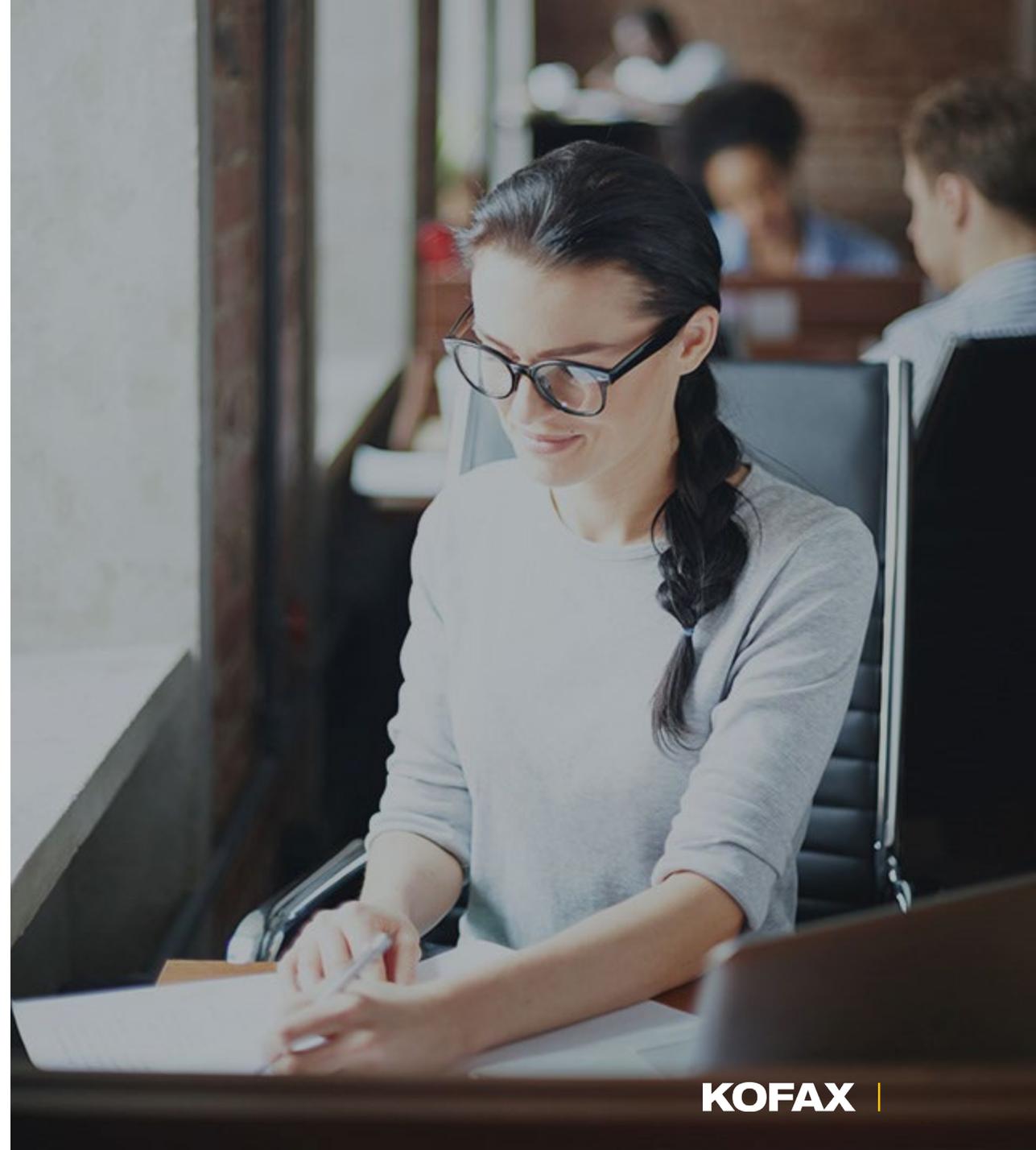
**Gartner**

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](#)



*WORK LIKE TOMORROW.™*

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