

Reshaping the future

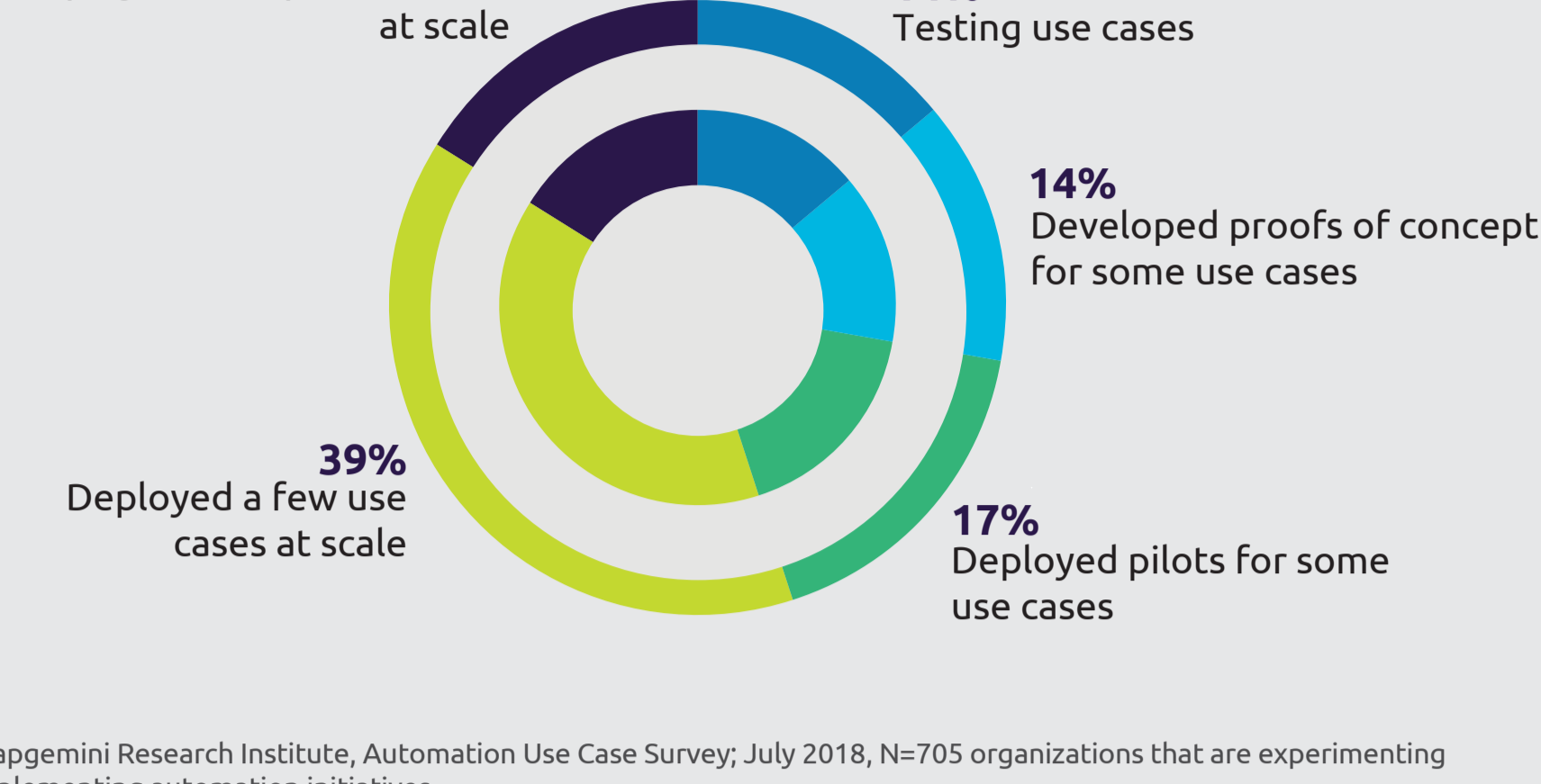
Unlocking automation's untapped value



Organizations are only scratching the surface of automation

Only a minority of organizations are deploying multiple use cases at scale*

Current level of automation deployment among organizations experimenting with or implementing automation



Source: Cappgemini Research Institute, Automation Use Case Survey; July 2018, N=705 organizations that are experimenting with or implementing automation initiatives.

*"At scale" is defined as deployment of multiple automation use cases at scale, i.e. across multiple processes and across the breadth of the countries the company operates in.

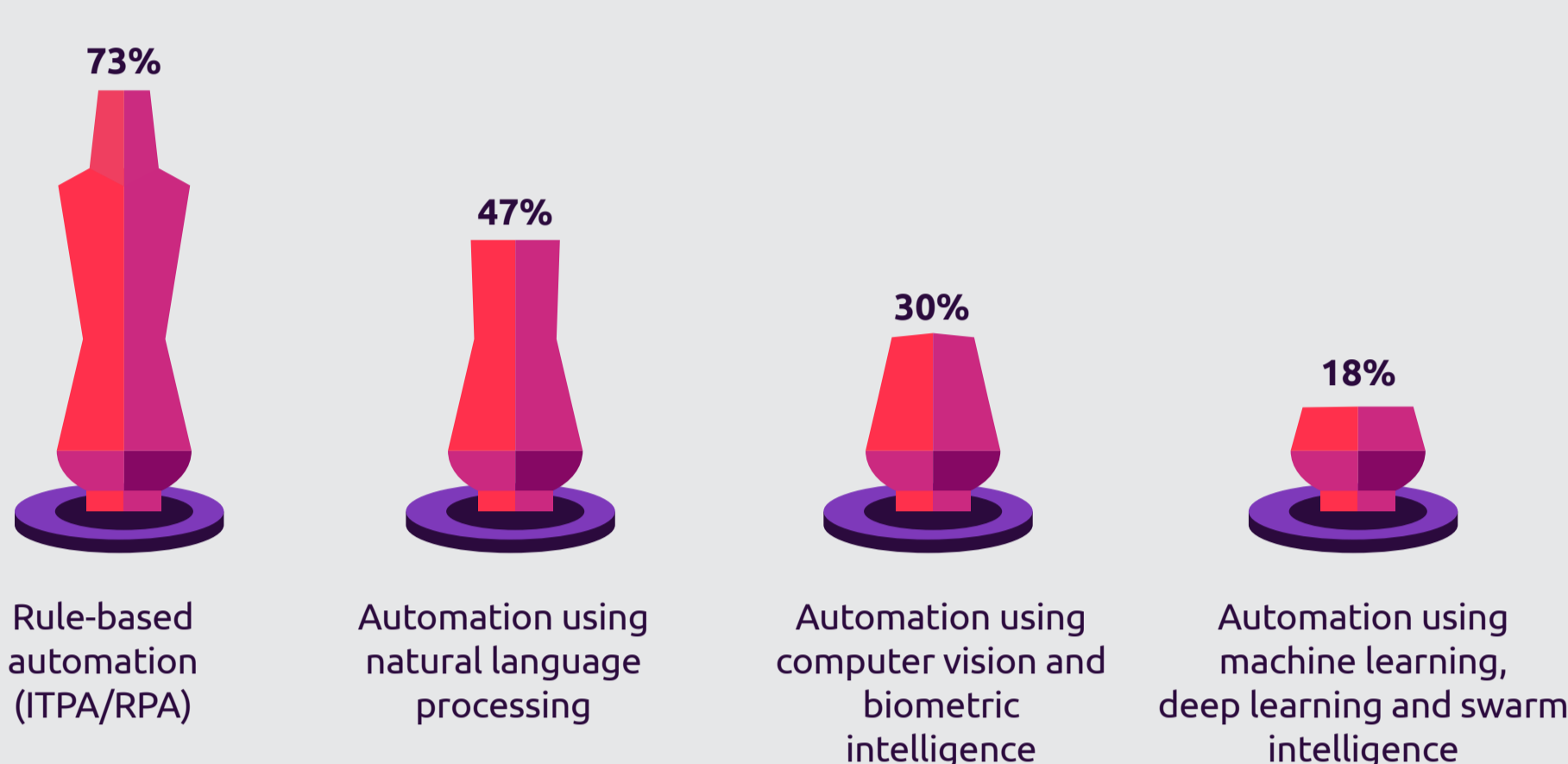
Most organizations are focused on operational benefits over topline opportunities

43% of organizations experimenting with or implementing automation rank **quality improvement** among the top two drivers for automation initiatives

Only 23% of organizations experimenting with or implementing automation rank **incremental revenue gains** among the top two drivers for automation initiatives

Most organizations are focused on rule-based tools with few having progressed to artificial intelligence automation

Current focus on automation technology among organizations experimenting with or implementing automation



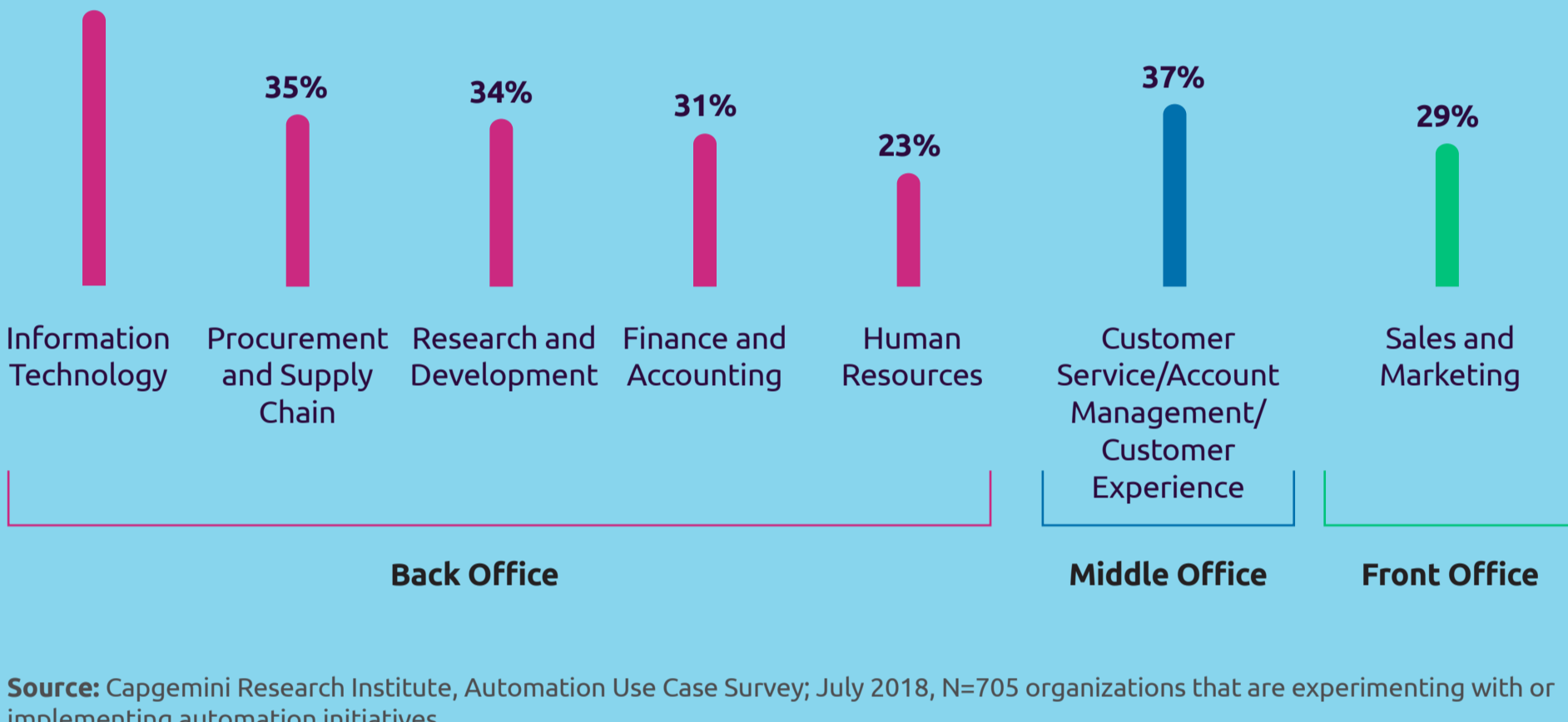
Source: Cappgemini Research Institute, Automation Use Case Survey; July 2018, N=705 organizations that are experimenting with or implementing automation initiatives.

*Question asked was a select all that apply: "Which of the following best describes the technologies your organization uses in its automation initiatives?"

Automation progress is restricted to the back and middle office

The back and middle office leads in automation implementation

Overall* automation implementation by function among organizations experimenting with or implementing automation



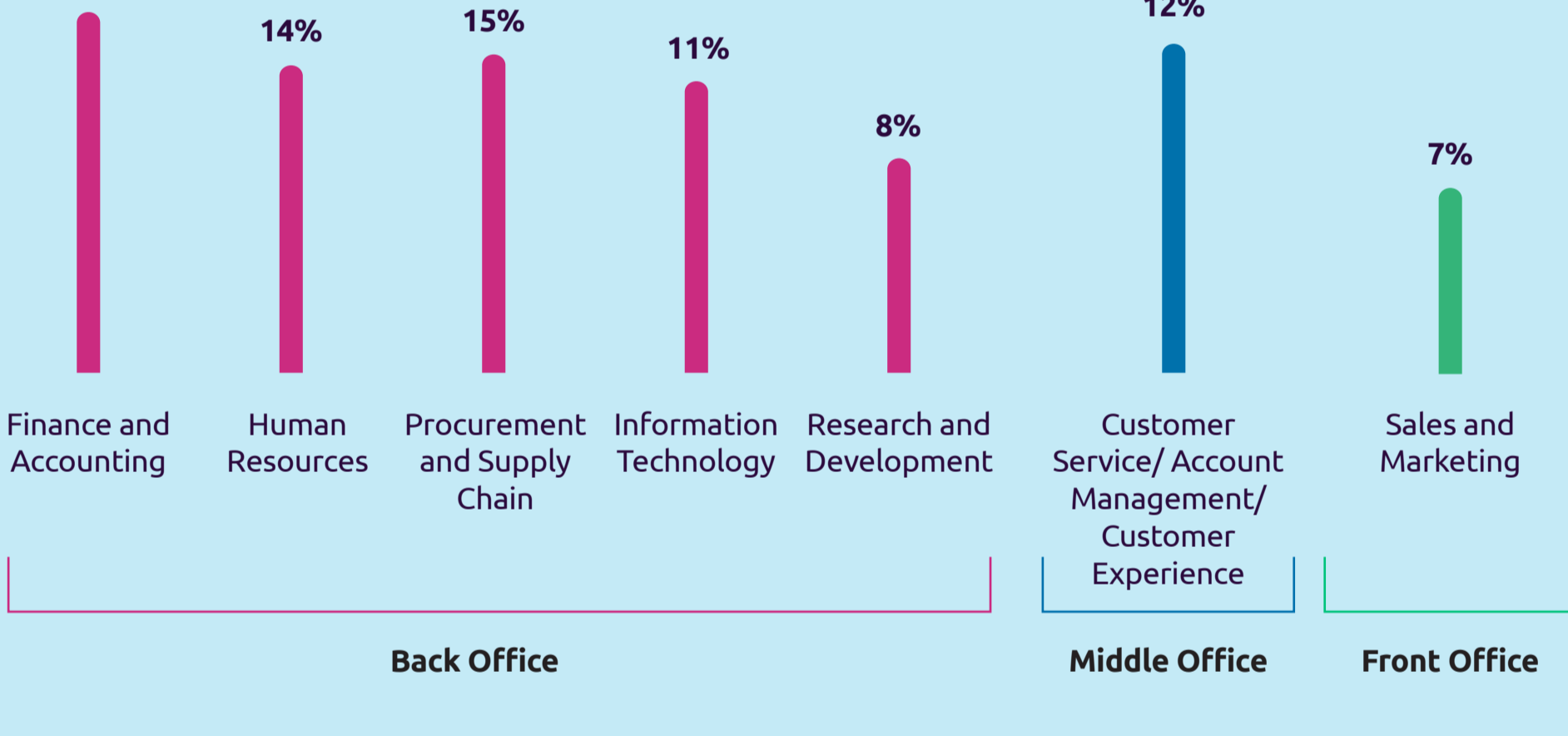
Source: Cappgemini Research Institute, Automation Use Case Survey; July 2018, N=705 organizations that are experimenting with or implementing automation initiatives.

*Overall automation includes testing, proofs of concept, pilots, few deployments at scale and multiple deployments at scale.

**Question asked was a select all that apply: "In which of the following functions has your organization implemented automation initiatives?"

Back- and middle-office functions realize the greatest automation benefits

Average cost savings by function for those organizations implementing automation at scale



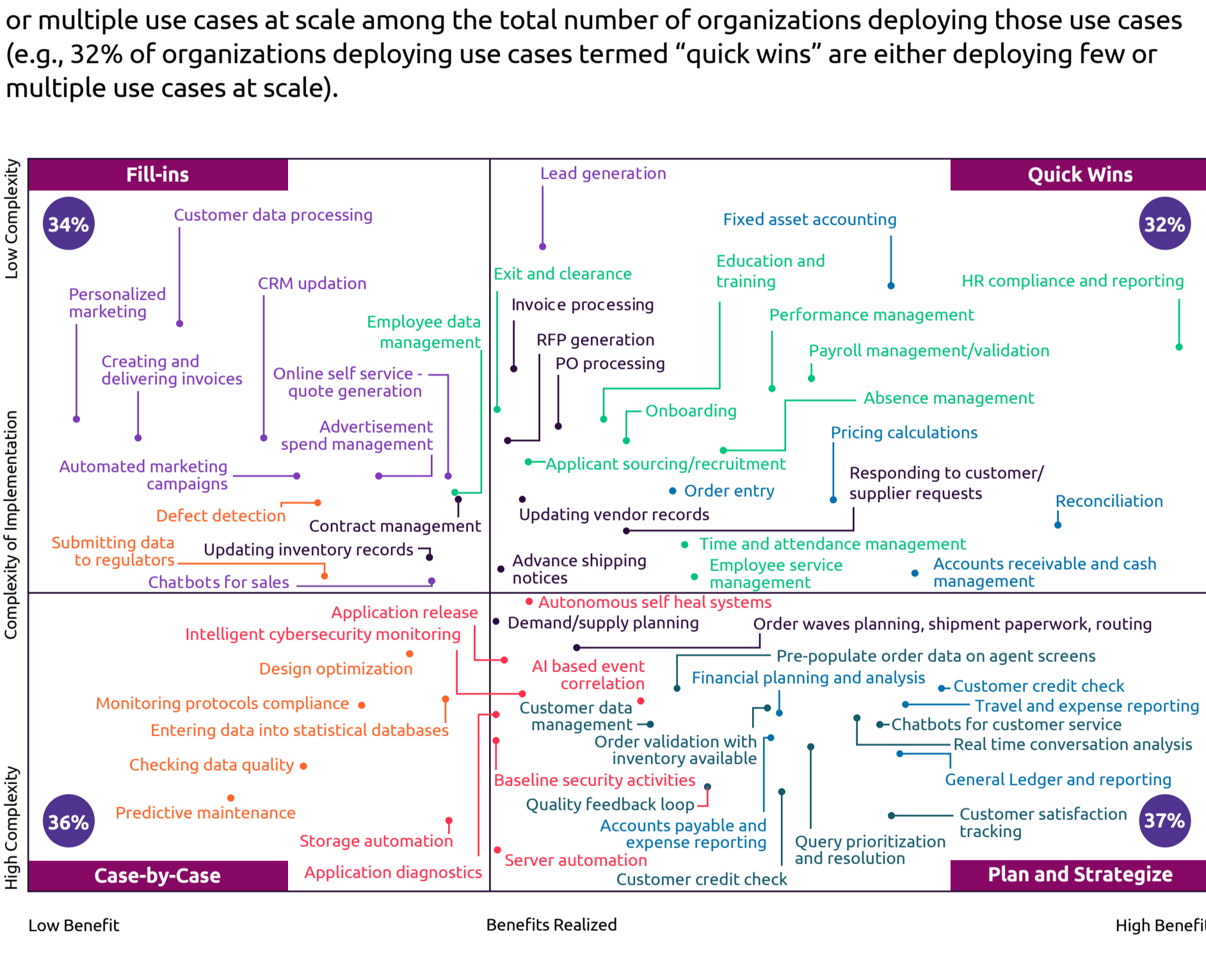
Source: Cappgemini Research Institute, Automation Use Case Survey; July 2018, N=111 organizations implementing automation at scale.

Many organizations are missing a sizeable quick-win opportunity

Only a third (32%) of organizations have implemented "quick wins" – those use cases that are not only easy to implement but also have a high benefit upside

Distribution of use cases by complexity of implementation and benefit realized across functions and sectors

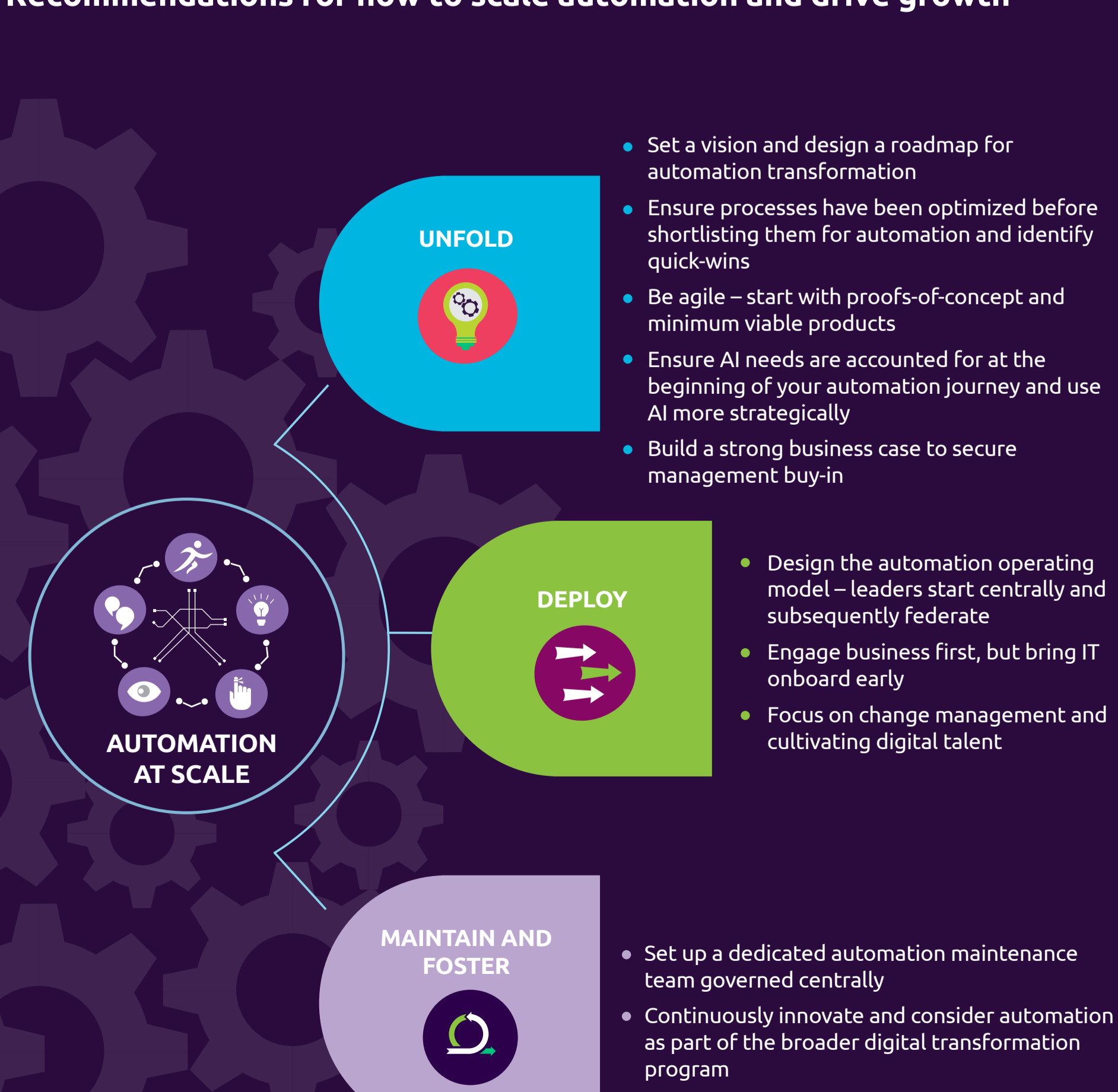
The percent distribution in each quadrant indicates the percentage of organizations deploying few or multiple use cases at scale among the total number of organizations deploying those use cases (e.g., 32% of organizations deploying use cases termed "quick wins" are either deploying few or multiple use cases at scale).



Source: Cappgemini Research Institute, Automation Use Case Survey; July 2018, N=705 organizations that are experimenting with or implementing automation initiatives.

How to scale automation and propel growth

Recommendations for how to scale automation and drive growth



Source: Cappgemini Research Institute.

Automating at scale can drive significant cost efficiencies – Scaled automation adoption could lead to cost savings from \$32 billion to \$165 billion across the automotive, retail, utilities, and manufacturing sectors

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