

Introduction

It's an old expression but never more true: Times have changed for the world and for business. To stay ahead, companies need to transform how they operate. And intelligent automation can have a profound impact on their success, helping to improve business continuity and efficiency, overcome staffing and operational challenges, as well as drive business growth—especially as the technology continues to evolve.

But companies don't need to wait for the future to find value in intelligent automation. They can realize the substantial benefits of the technology right now. There is a better way to work, and it's time to let people and teams focus on what they do best, collaborate, create, and grow businesses and let the Digital Workforce succeed with intelligent automation.

Welcome to **Automation Now & Next 2022**. Based on a survey of more than 1,000 business, technology, and automation professionals, this unique report is the culmination of months of research to capture what's happening today with intelligent automation and Robotic Process Automation (RPA) enterprise deployments and to anticipate what will occur in the years ahead.

Findings are broken down into three parts:

1. Understanding the impact of disruptive events on last year's automation plans and initiatives.
2. Capturing a snapshot of the state of intelligent automation today.
3. Identifying the forces that will shape the future of intelligent automation in the coming 12 months.

Exploring the top performers

What makes a company the leader in its industry? Included in Automation Now & Next 2022 is an analysis of an elite group of automation leaders—or “top performers.” Read about the traits and characteristics that enable that elite group to pull ahead of their industry peers on financial returns and realize substantial business value.

There's also a deep dive into the “what next?” that lays the foundation and roadmap for companies to measure their automation maturity compared to peers and to benefit from the lessons of automation leaders to become top performers as well.

About this paper

Automation Now & Next 2022 offers key findings from a global study performed by Futurum Research, an independent research and analysis firm. It involves professionals from North America, Europe, and Asia whose organizations are actively evaluating and/or deploying intelligent automation. The professionals represent organizations of all sizes. They have business responsibilities that range from the planning, implementation, or management of IT, automation, or digital transformation initiatives to business and operational leaders in non-technology roles such as corporate operations, human resources, finance, product development, manufacturing, sales, marketing, or customer support.

Common Definitions

Automation, as used throughout this report, refers collectively to both RPA and intelligent automation, along with the systems, solutions, and technologies required to support the development and deployment of bots.

Robotic Process Automation (RPA) enables you to create software robots (“bots” or digital workers) that are programmed to “observe” and mimic human digital actions. You show your bots what to do by typing text, entering commands, clicking on menus, and other actions that can be performed using a keyboard and mouse/trackpad, and the bots replicate those actions to complete tasks. RPA is best for repetitive, rule-based digital processes based upon structured data.

Intelligent automation is a combination of RPA, artificial intelligence (AI), and analytics technologies, which together can automate end-to-end business processes and, in turn, accelerate digital transformation. Intelligent automation-based bots are intelligent in that they can learn as more data is fed into them.

Industries Surveyed



Energy
& Utilities



Financials
& Insurance



Government
& Public Sector



Healthcare &
Life Sciences



Industrial Materials
& Manufacturing



Retail, Wholesale
& Consumer Goods



Services &
Consulting



Technology
& IT Services



Telecom
& Media

Executive Summary

The past 12 months have been challenging for enterprises and organizations across all industries and geographies. The impact of the global pandemic, ongoing trade issues, and political conflicts have disrupted business operations, which has, in turn, exacerbated existing workforce issues, created supply shortages, and made demand forecasting and customer engagements difficult.

The survey found that to overcome these challenges, organizations are making intelligent automation a foundational technology for running their core business operations. The nine key findings are summarized as follows:

Intelligent automation is successfully mitigating the impact of global events

In the face of the pandemic and its fallout, organizations accelerated their automation plans to better manage the business challenges. Of the respondents, 94% say automation is helping address supply chain issues, and 61% strongly agree automation has helped address staffing shortages. This is enabling businesses to continue delivering great customer experiences amid ongoing disruption.

Automation has become core to business transformation

Almost all (95%) now consider intelligent automation a key component of their transformation strategies. By centralizing automation planning, organizations are integrating automation deeply into their digital transformation efforts.

Business benefits and ROI are way up

Respondents cite average financial returns on investments (ROIs) on automation of 6.3x—up from 2.5x in 2021, with more than half of all business (non-IT) respondents saying they've achieved upwards of 7x ROI within their business units.

Top performers are achieving 8.5x ROI, outpacing all others

Most organizations (68%) identified as automation leaders spent the last year radically adjusting their automation strategies in response to global events. Of the respondents, 78% shifted their near-term focus from financial ROI to improving long-term operational performance. And 99% are using automation and intelligent assistants (collaborative chatbots) to help employees work smarter and make better decisions.

Automation budgets are dramatically increasing

More than three fourths (77%) of organizations will up their automation budgets in the next 12 months. A quarter of them (24%) are boosting automation funding by 25% or more. And when they were asked what would be most helpful to speed automation deployments, being allocated more money came out on top.

Automation success requires the cloud

92% of enterprises have begun migrating their existing automation implementations to the cloud, and approximately the same number (93%) have established cloud-first mandates for all new automation initiatives.

Support for citizen developers is overwhelming

Of the respondents, 84% support the idea of citizen developers; 37% say that training citizen developers is a top-five priority to move ahead on spreading automation throughout the enterprise.

Executive leadership is key to scaling intelligent automation

Automation and business leaders cite lack of executive support and vision as the second most significant challenge they faced in achieving this past year's automation goals. Looking ahead, they're counting on executives who can help business units and teams understand the value and urgency of deploying automation to meet today's business challenges, citing that same support and vision as one of top three requirements to accelerate the deployment of intelligent automation over the coming year.

The future of work is automated

Almost all respondents (95%) agree collaboration between humans and intelligent assistants will play an important part in future-of-work strategies (49% strongly agree).

Findings

2021: The Year of Operational Disruptions and Challenges

The past two years will be remembered as an almost perfect storm of business disruptions: a global pandemic, ongoing supply chain and trade issues, and political conflicts. These events have dramatically affected business operations across all industries and geographies. Following are the top challenges noted by respondents:

88%

Retaining or recruiting employees has been challenging (50% strongly)

84%

Staffing shortages have impacted productivity (40% strongly)

85%

Supply chain issues have disrupted workflows and processes

86%

Operational efficiencies have been impacted

Despite these challenges, organizations have achieved admirable degrees of success in overcoming recent global disruptions. How? With automation.

Percent of organizations that strongly agree intelligent automation is:

61%

Helping address staffing issues

45%

Helping address supply chain issues

52%

Becoming more important in meeting customer needs

Overall, 92% of organizations in the study indicate they adjusted their automation plans either somewhat or strongly in response to global events over the past year. This corresponds directly with a greater-than-expected increase in the deployment of intelligent automation solutions, helping a majority of organizations overcome a very disruptive year to meet their business and intelligent automation goals.

NOW

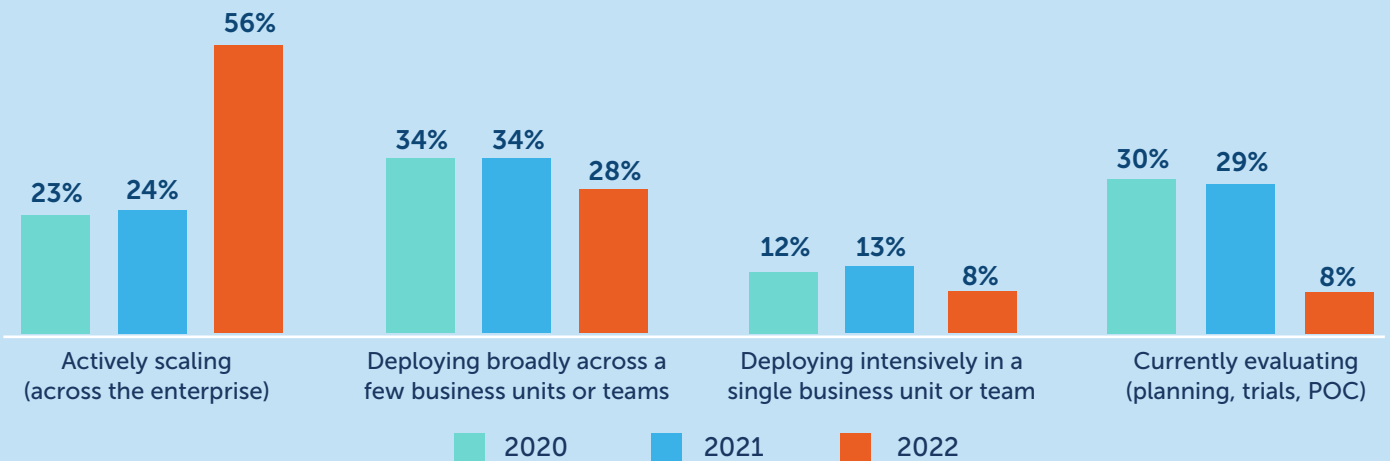
The Current State of Intelligent Automation

Reliance on intelligent automation has risen dramatically over the past year as organizations have matured in their understanding of the benefits that automation can provide to help them overcome the multiple challenges created by recent global events, maintain business continuity, and drive growth.

Automation deployments continue to scale and mature

Intelligent automation implementations have continued to mature as the number of organizations that are actively scaling automation more than doubled between 2021 and 2022, from 24% to 56%.

2022 saw a massive 133% year-over-year increase in organizations actively scaling automation across the enterprise*



The increase in organizations who are actively scaling correlates partly to organizational experience and the length of time they have been deploying automation tools.

66% of organizations who began deploying bots 3+ years ago are actively scaling, demonstrating that intelligent automation is ready for primetime and delivering enterprise-wide value.

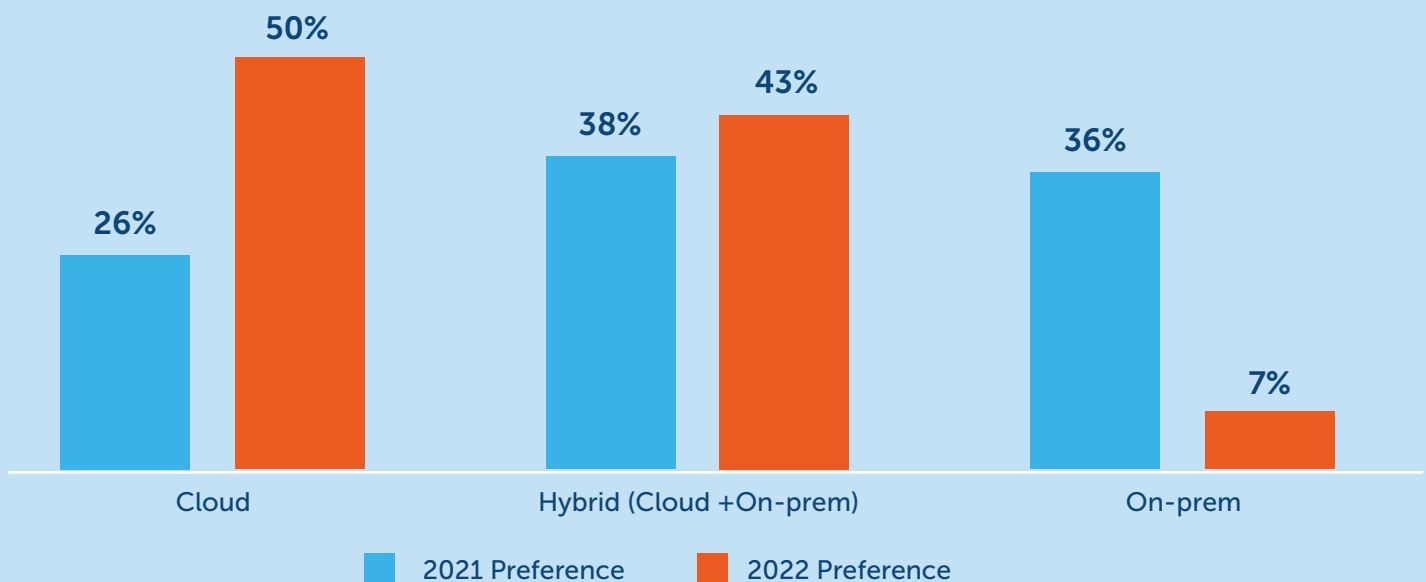
80% of organizations say they've been using automation tools for two or more years with more than 45% saying they began their journey three or more years ago.

Enterprises mandate cloud-first for new deployments

In 2021, 36% of organizations were still considering deploying new bots on premises. At that time, they said that they expected that number would decrease to just 10% by 2022. Data in 2022 shows, however, that they've embraced the cloud faster than expected, with just 7% saying they still prefer to deploy new bots solely on premises.

Hybrid deployments (cloud + on premises) have also lost traction over the past year. In the 2021 Now & Next report, 52% of enterprises expected to be focused on hybrid deployments this year, but preferences for pure cloud implementations surpass hybrid approaches 50% to 43%.

Preferences changed fast as enterprises now prefer pure cloud for new deployments



Definitions: Cloud = Strongly prefer cloud-first Hybrid = No strong preference On-prem = Disagree with cloud-first

As it turns out, the maturity of organizations' intelligent automation deployments is strongly aligned with whether they choose cloud or not.

59% of organizations that began their automation journey 3+ years ago strongly agree that they are cloud-first for new deployments. Only 43% that began their journey in the past 2 years say the same.

The shift to the cloud also affects existing deployments. Across all respondents, 92% agree with the statement "we're moving existing bots to the cloud," 58% of them "strongly." And maturity of deployment affects this trend, too: 67% of organizations that began their automation journey three or more years ago strongly agree with the statement, versus only 50% of those with two or fewer years of automation experience that did.

Average automation ROI more than doubled in 2022

Organizations are reaping phenomenal returns on their automation investments, from a financial perspective and from “softer” measures, such as work time saved, overall productivity, and quality.

6.3x Average financial ROI vs. 2.5x in 2021

Percentage of industries that saw more than 7x returns on financial automation investments:

71%

Telecom
& Media

52%

Healthcare
& Life Sciences

50%

Tech
& IT Services

49%

Retail
& Consumer Goods

48%

Industrial Materials
& Manufacturing

The benefits (returns) of investing in intelligent automation go well beyond financial ROI and can deliver solid value in the reallocation of workforce resources, increased operational productivity, and improved quality and accuracy.

Here are some of the overall results achieved (per bot implementation) by this year’s survey panel as a result of their initiatives in implementing intelligent automation:

48%

average **savings in workforce effort** (time saved), with 19% achieving 70% savings

50%

average **improvement in productivity**, with 23% achieving 70% improvement

50%

average **improvement in quality & accuracy** per deployed bot, with 25% achieving 70% improvement

The key to achieving above-average returns is agility

A majority of enterprises made some type of adjustment to their automation strategies over the past year—of those that “strongly” agreed that they’d made such adjustments, 53% achieved more than a 7x return on their automation investments.

Business benefits transcend ROI

Although financial ROI is an important metric for benchmarking the success of your automation initiatives, other measures of return and results are equally significant. When asked about the top business benefits they'd realized from their past year of automation efforts, respondents listed reduced cost, enhanced business continuity, and improved employee experiences at the top of their list.

Top business benefits achieved due to automation deployments

2020 / 2021

- 1 Productivity improvement
- 2 Higher-value work for employees
- 3 Reduced cost

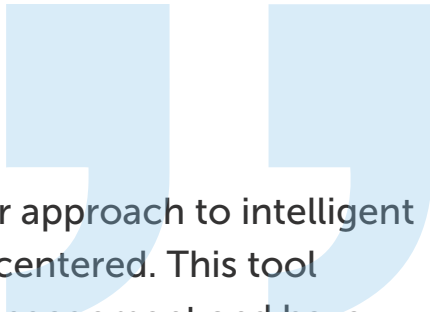
2022

- 1 Reduced cost
- 2 Enhanced business continuity
- 3 Improved employee experiences

This year's ranking is a significant shift from those in the prior surveys, where productivity improvements and shifting employees to higher-value work were the top benefits achieved in 2020 and 2021. But this year's results are not surprising.

Consider that business continuity has been threatened for many organizations as they continue to deal with major economic disruptions, supply chain issues, and, most importantly, significant labor shortages and challenges in the recruitment and retention of employees that may not significantly improve for years.

Improving employee experiences—and thus job satisfaction—will play a key role in the ability of organizations to recruit talent in the near-term. But the real benefit will be found in employee retention, potentially reducing the need to recruit and train new workers. This is an area where automation can provide tremendous value by improving the productivity, efficiency, and accuracy of employee efforts and reducing low-value, repetitive tasks that detract from employee satisfaction.



“We’re making sure our approach to intelligent automation is people-centered. This tool should enhance staff engagement and have a **positive impact** on the work we do. One of the many benefits of IA is that it is completely limitless in terms of the applications it can work with and access—this breaks down barriers and allows us to **think more creatively** about the way we work.”



Donna Watson

Head of Workforce Engagement and Information Systems

Newcastle upon Tyne Hospitals NHS Foundation Trust

The Newcastle upon Tyne Hospitals NHS Foundation Trust, a leading digital innovator and HIMSS Stage 6 accredited organization, has provided patient-centered healthcare to communities in the North East of England and beyond for more than 250 years. Seeking a new way to maximize “time to care” while keeping costs down, the organization looked to intelligent automation as a way to enhance workforce processes and further improve employee morale. Now, intelligent automation is enabling Newcastle Hospitals to structure front-end e-forms, with bots running 24/7 to collect and input the critical workforce and clinical data. The result? 100% accuracy, a drastic decrease in data input time, and happier staff.



100%

Accuracy

24/7

Claim Processing

Top Performers

Top-performing organizations—those automation leaders that overachieved significantly when compared to their peers—set new benchmarks for their achievements not only in returns realized but in the overall improvement of their business operations and their ability to overcome significant business disruptions and challenges over the past year. And this is an exclusive club, only 15% of the organizations surveyed met all six of the criteria (see sidebar).

Average scores of top performers in “Benefits and ROI” category of top performer metrics

8.5x Average financial ROI

71% Average work effort (time) savings

74% Average improvement in productivity

74% Average improvement in quality/accuracy

Definition of Top Performers

Maturity

Top performers must have at least two years of automation implementation experience (to assure valid results in other areas).

Benefits & ROI

Top performers must outperform overall average returns across all four measured metrics to demonstrate meaningful business value:

- Financial ROI \geq 6.6x
- Workforce Savings > 50%
- Productivity Improvement > 50%
- Quality Improvement > 50%

Confidence

Metrics alone may not tell the whole story—we’re interested in those whose own perspective of their results allows them to state they consider themselves industry leaders in the adoption of automation technologies.

What Did Top Performers Do Right?

1

Invest in intelligence

Top performers have prioritized intelligent automation and focused on the value of intelligent assistants as an important part of their future-of-work strategy.



Have prioritized intelligent automation



View intelligent assistants as an important part of future-of-work

2

Leverage automation widely

Top performers are actively scaling across the enterprise, using automation to address critical worker shortages and supply chain issues.



Actively scaling across the organization



Addressing supply chain issues with intelligent automation

3

See broad value in automation

Top performers believe most employees could benefit from at least one bot and strongly support citizen developers.



Have deployed 300+ bots



Support citizen developers

4

Focus on agility

Top performers adjusted their intelligent automation strategies to successfully adapt to (and counter) global events as well as focus on performance gains and cloud adoption.



Adjusted their intelligent automation strategy to adapt to global events



Adopted a cloud-first strategy for new bot deployments

5

Treat intelligent automation as a core component of digital transformation

Top performers have embraced intelligent automation as a core technology with a centralized approach to the planning and adoption of automation across the enterprise.



Adopted a centralized approach to automation planning



Made automation a key component in their digital transformation strategy

◆ Non-Top Performers



Manish Kumar

Product Owner (Eastern Hemisphere), Digital Productivity Studio

Schlumberger Limited

“It is extremely important to have buy-in from leadership and show them the proof of concept and return on investment. If there is a possibility of creating a global impact, we work toward it by aligning senior decision-makers. Higher **leadership support** toward automation strategy helps in driving bigger engagements and we **see a much greater end result.**”

Founded in 1926, Schlumberger Limited is the world’s leading supplier of technology, integrated project management and information solutions to the international oil and gas exploration and production industry. Its three-year automation journey has garnered five top awards for some of its most successful projects, in which more than 265 bots have saved close to a million hours—approx. 500 full-time employees. “Automation is a game-changer,” says Sudeep Srivastava, head of robotics and intelligent automation for Schlumberger.

Schlumberger

265

Bots Deployed

1M

Hours Saved

Automation Anywhere Customer Data

The Automation Now & Next report is positioned to provide definitive data on the future of work through cross-market survey data and insights that detail the impact of the global pandemic and macro-economic challenges on accelerating industry transformation. Findings show that the business world is at a technology tipping point for automation and that automation is the future of work. Customer data supports these findings and uniquely demonstrates that automation is more than a vision; it is a reality. And it is a reality that many enterprises have already embraced as they have started to see positive outcomes from adopting these technologies.

Cloud-based RPA adoption is growing

Businesses across all industries have adopted cloud to drive their digital transformation initiatives and achieve their goals.

Industries with the **more than 50% growth in cloud adoption** include:



Telecommunications



Entertainment & Media



Manufacturing



Healthcare



Financial Services

Customers continually choose cloud license models:



669% year-to-year cloud revenue growth

Customers are migrating to the cloud, but not evenly:



68% of all customers have chosen cloud

Large customers (with more than 3,000 employees) make up 50% of total customer base, but only 34% have adopted cloud. Smaller customers are adopting at higher rates, with more than 50% choosing cloud. Despite today's differences, however, enterprise customers will likely accelerate adoption and catch up to their smaller counterparts.

“Combining RPA and intelligent automation enables automating complex processes and workflows from end to end. Our focus is on **scaling up** more on RPA along with introducing intelligent automation to drive long-term change in the organization and **deliver business value**. We believe that IA has tangible benefits that will improve how work is done throughout the company.”



Vindhya Renukaprasad

Automation Manager

McAfee Corp.

McAfee Corp. is a global computer security software company and a worldwide leader in online protection. Although early on its automation journey, McAfee has successfully transformed manual processes through IT, HR, finance, and legal. The biggest benefit thus far? Employment empowerment and engagement. “Employees get a better work-life balance and more time to focus on innovative tasks,” says Vindhya Renukaprasad, automation manager for McAfee.



2x

Greater Cost-
efficiency and
Better Customer
Experience

100%

Employee
Engagement

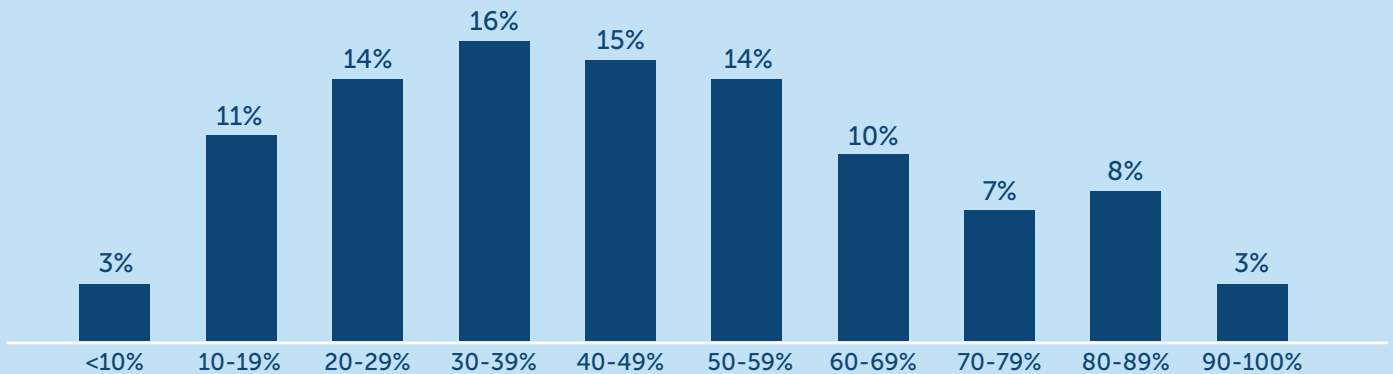
The Future of Intelligent Automation

Regarding the next 12 months, the data indicates that the future of automation will be significantly different than what has happened in 2022.

Organizations see broad-based value in automation

More than 40% of survey respondents believe that more than half of all employees could benefit from even just a single bot to help them in their daily work routines.

What % of your workforce could benefit from (using) at least one Digital Worker?



Similar projections of broad-based value that will be key to helping drive enterprise-wide automation implementation can be seen for specific business functions:

70% of organizations estimate **at least 30% of regular work activities** in customer service, sales, marketing, finance, human resources, and IT could potentially be automated.

Which industries see the greatest potential value in broad-based automation deployment?

Industries that believe more than half their workforce could benefit from using at least one Digital Worker in the next 12 months includes **Telecom & Media (68 %)**, **Healthcare & Life Sciences (57%)**, and **Financial Services & Insurance (49%)**.

Key business goals for 2022

When survey respondents were asked in 2022 to identify and rank the business priorities driving their current automation decisions, their answers closely mirrored the top benefits they had achieved in 2021.

Top goals driving automation implementation decisions in 2022

- 1 Reduced cost
- 2 Improved employee experiences
- 3 Enhanced business continuity
- 4 Business analytics enhancements
- 5 Accelerated innovation

Common Definitions

Reduced cost: Unpredictable customer demands and product availability issues disrupted the flow of working capital for many organizations, making cutting costs an imperative.

Enhanced business continuity: Organizations needed to “keep the doors open” in the face of rapidly changing economic, political, and environmental dynamics.

Improved employee experiences: The Great Resignation of 2021 made it critical to keep employees satisfied to address recurring staffing shortages and pandemic restrictions.

IT functions continue to be a top priority for automation

In 2021, 66% of organizations said they were adopting automation within their IT organization. Today, 74% of respondents cite IT and data management as their top priority in the coming 12 months. Over the past few years, the levels of demand for IT support and management services have ballooned due to changes in work environments, shifts in customer demands and global events. Plus, talent shortages have been an IT reality that predated the pandemic, and today automation is keeping many IT organizations operational.

Consider automation for key business functions:

- More than 90% of respondents say automation is helping to address staffing shortages, supply chain issues, and has become more important to meeting customers’ requirements.
- More than 90% say automation has become a key component in their digital transformation strategies, with 63% now depending upon a centralized IT/automation team to plan enterprise-wide automation.

Top focus areas for automation over the coming 12 months

- 1 IT/Data Management (74%)
- 2 Customer Service & Support (38%)
- 3 Finance (27%)
- 4 Human Resources (26%)
- 5 Marketing & Sales (25%)

Citizen developers are key to overcoming barriers, accelerating automation

Organizations are looking to scale automation across the enterprise to address staffing issues, control costs, and deliver business value, including bolstering business continuity. But IT and automation teams are often short staffed, dealing with massive, often unchecked, deployments of digital devices and the acceleration of digital transformation initiatives. Under enormous pressure from global events, many organizations have tried to implement 10 years of automation strategy in two years or less, facing significant challenges in meeting their automation goals in the last year.

Top challenges over the past year in achieving intelligent automation goals

- 1 Lack of understanding on RPA value within business units or teams
- 2 Limited executive support or vision for RPA or intelligent automation
- 3 Security or monitoring concerns
- 4 Greater (faster time) to ROI
- 5 Compatibility with existing IT systems
- 6 Insufficient budgets

To scale across the enterprise, the respondents say they need additional budgets, greater support from executives, and simplified development tools for citizen developers. They also require improved security and monitoring tools, presumably to monitor/manage citizen developer bots.

Top most helpful items to accelerate deployment of bots across the enterprise

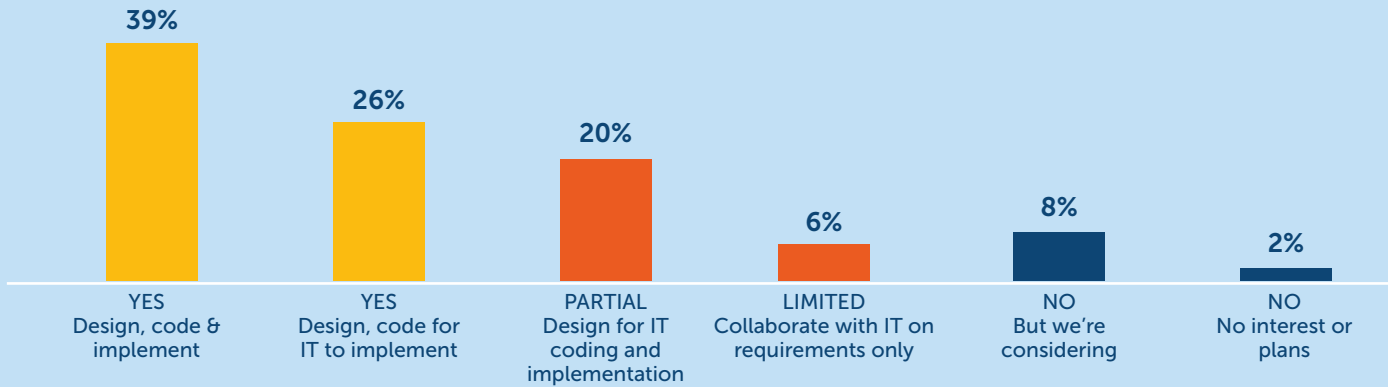
- 1 Additional budget resources
- 2 Additional executive support or vision for intelligent automation
- 3 Training & up-skilling for citizen developers
- 4 Availability of low-code/no-code tools (for designing/developing bots)
- 5 Better security & monitoring tools
- 6 Ability for citizen developers to design/develop their own bots

Notably, three of the top six accelerators of overall adoption focuses on citizen developers. While better coding and security tools are needed, data indicates leadership and educational issues are key to driving increased automation.

Support for citizen developers continues to increase year over year

In the last report, 53% of organizations reported they were willing to broadly encourage citizen developers or allow them to participate in some aspect of the bot development. In just one year, support for citizen developers has increased to 84%, including 39% of organizations who say they would support citizen developers designing, coding, and implementing their own bots without IT intervention.

Willingness to support citizen developers



The year-over-year increase is significant—yet has also challenged many organizations. Although support for citizen developers is one of the top three ways to accelerate automation, that support requires resources and educational and behavioral changes that are not easy to acquire.

Top keys to accelerating support for citizen developers

- 1 Improved security or monitoring abilities
- 2 Increased employee interest or awareness (in designing/developing)
- 3 Access to low-code/no-code tools
- 4 Additional training/resources for IT to support citizen developers
- 5 Greater executive support
- 6 Additional budget resources

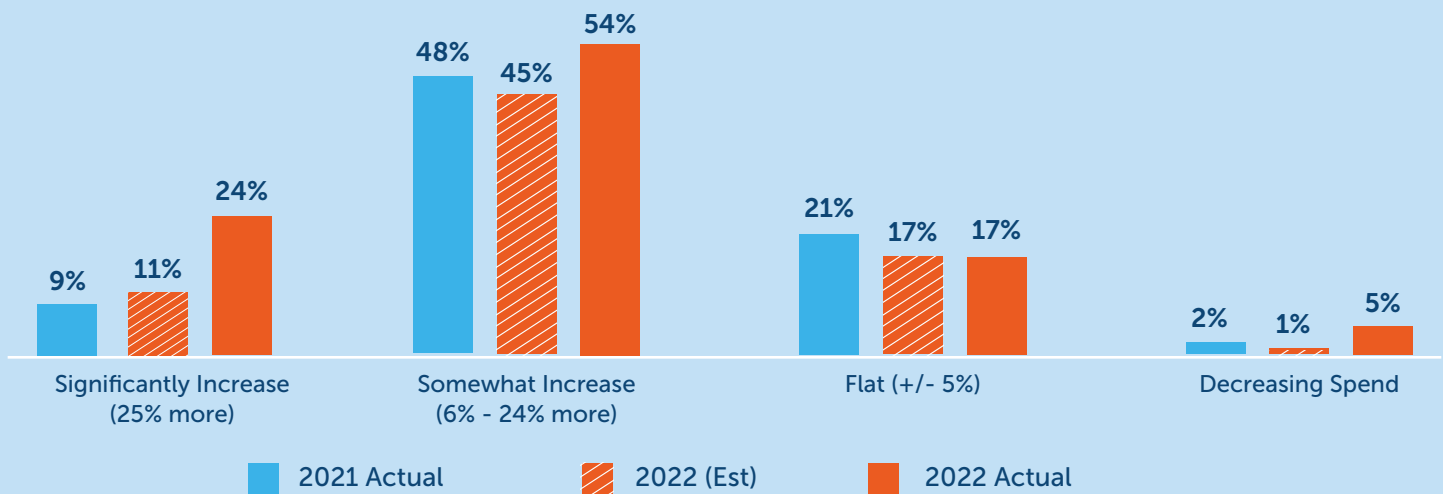
Budget increases for the coming year top expectations

Compared to 2021, an overwhelming 78% of business and automation leaders plan to increase their upcoming budgets, with almost a quarter (24%) expecting to increase them by 25% or more.

Actual budget growth for this year of 25% or more is more than twice original estimates from the 2021 study, which suggested a more modest 11% of organizations would increase budgets by 25% or more this year.

For top performers, 90% are increasing budgets this year with 52% increasing spend by 25% or more.

Automation Budgets for Investment/Deployment (Over the coming 12 months)



This increase is in line with data points that cite additional budget as the top factor in increasing automation initiatives and will be critical to help organizations acquire the security monitoring, low-code/no-code technologies, and training required to support citizen developers.

Which industries are expected to increase budgets the most to fuel expansion of automation?



55% of **Telecom & Media** companies plan to increase by 25% or more



43% of **Financial Services & Insurance** firms plan to increase by 25% or more



38% of **Healthcare & Life Sciences** organizations plan to increase by 25% or more

Next Steps for the Year Ahead

Success will be driven by the choices of organizations and the foundations they put in place today. More forward-thinking organizations—as evidenced by the actions of automation leaders and top performers—should focus on establishing the right partnerships within their organizations and throughout their extended enterprise. The recommendation is that all organizations set a goal of being an automation leader that:

1 Invests in intelligent solutions

that include intelligent automation and the value of intelligent assistants as part of a holistic future-of-work strategy. That strategy leverages the collaborative aspect of automation and intelligent assistants to help employees work smarter, more efficiently, and focus on higher-level tasks that drive increased satisfaction and retention.

2 Seeks out new business value through automation

and recognizes that every employee can benefit from the efficiencies automation provides, not just as a user of bots but as a citizen developer with the ability to automate the tasks that are most important (or tedious) to the employee.

3 Understands and can communicate the value of automation

as a tool to drive business value and counter or mitigate business disruptions and operational risks. Key to this is the willingness to continuously identify potential opportunities to test new use cases, recognizing that every business function—and every business process—will be more digital and find increased value in automation.

4 Leverages automation as a core technology to become more agile

not just to automate tasks or achieve particular performance goals or metrics. The ultimate value of an intelligent automation platform is its ability to allow employees and organizations to focus on higher-level tasks and take advantage of opportunities previously unavailable. To be agile in your business, you need an automation platform that is agile and adaptable.



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