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# Automate or Stagnate

The Impact of Intelligent Automation  
on the Future of Work



# The Impact of Intelligent Automation on the Future of Work

## How Intelligent Automation is Disrupting a Global Workforce while Creating New Economic Models for Success

A new wave of economics is emerging across the globe, driven by the rapid convergence of automation and Artificial Intelligence (AI). It is transforming how organizations view themselves. It is forever changing how the employees that drive businesses live and work. It is connecting talented people with the opportunity to create and innovate with unprecedented speed. This is the power of connected-Robotic Process Automation (RPA) and it is pivotal to how organizations will survive and thrive in the global economy.

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This sea change in the way we work runs far deeper than just speeding up processes. This is about the first revolution to place the human at the heart of the creative value chain. At a time when the developed global economies are facing multiple challenges to productivity, tapping into the latent potential of humans is critical to reversing this trend.

Businesses across the globe have to contend with growing customer demands, ageing populations and skills gaps, amongst other pressing concerns. Technology can provide many of the answers to these problems, but left to its own devices its transformational impact will be limited. Businesses have to match the latest tech with a new way of thinking if they are to take on the challenges we now face.

The critical nature of the challenge is why we decided to investigate how businesses around the world are using technology to transform economic output. We focused on four key areas to develop a roadmap for success:

- 1) To what extent RPA and automation, in general, is understood and applied effectively
- 2) What impact the technology could have on the global economy
- 3) What employees think of the rise of the digital workforce
- 4) The competing views of business leaders and their teams regarding RPA

The study found that business decision makers around the world are hugely confident that they have a strong understanding of RPA and are harnessing it effectively within their respective organizations. This level of confidence, however, is not shared by the knowledge workers in their teams who are keeping the organizations running. While opinions differ on some elements of the equation such as this, there is greater clarity in others. RPA adoption is moving forward at great pace and the technology is widely regarded as essential to improving economic output.

These disparities and similarities have been mapped across businesses in key global markets, from the UK to the US, France to Germany and Japan to Australia. It is the disparities though, between business leaders and their employees, that is where we should pay the most attention. If a new wave of economics is truly to be ushered in, the gaps in understanding, application and perception have to be closed. The results show that we are just scratching at the surface of the potential that rests within our organizations; now it's time to dig a little deeper.

# What the numbers tell us



**88 percent**

of business decision makers see RPA, and 83 percent see IA, as a solution to the global productivity problem



**94 percent**

of business decision makers understand the benefits RPA can bring to their business. Yet only 73 percent of knowledge workers say they understand the benefits of RPA



**92 percent**

of business decision makers plan to extend use cases of automation across their business



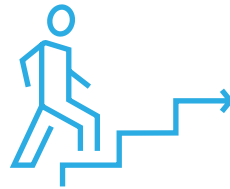
**76 percent**

of business decision makers agree that RPA offers more to the business than just time and cost savings



**61 percent**

of business decision makers feel their business is currently struggling to meet customer demand. 91 percent of them feel that automation would help solve the problem



**68 percent**

of knowledge workers appreciate the positive career opportunities that automation will provide



**76 percent**

of business decision makers are actively changing company culture to incorporate the digital workforce



**84 percent**

of business decision makers believe they have to work on building trust between employees and the digital workforce



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# Understand and apply

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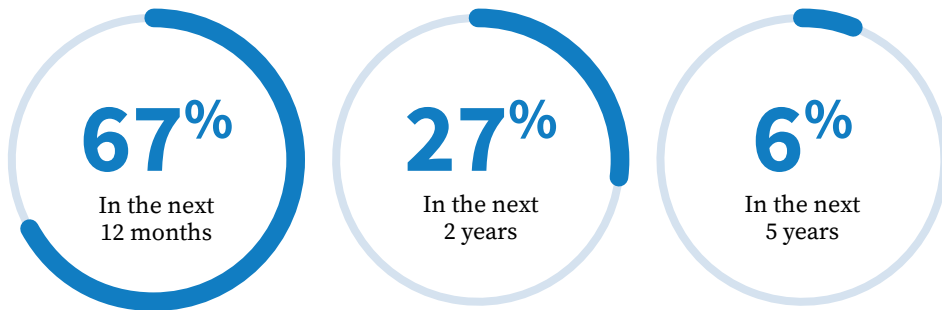
# Is growth in RPA adoption matched by understanding?

## RPA IS THRIVING

The growth of RPA across enterprise organizations cannot be disputed. Of the 92 percent of business decision makers who plan to extend use cases of automation across their organization, more than two-thirds plan to do so within the next 12 months.

## BUSINESS DECISION MAKERS

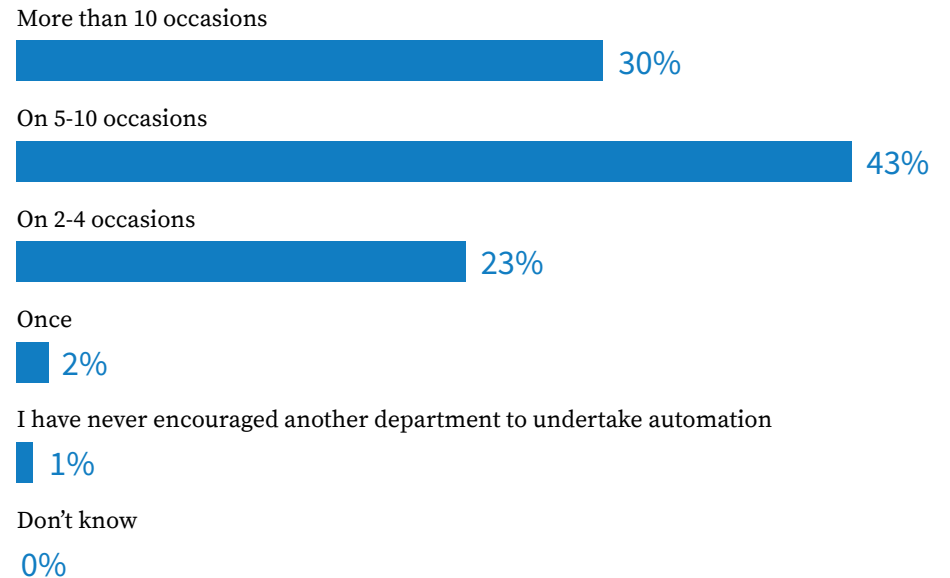
Of those business decision makers who plan to extend use cases of automation within their organization, more than two-thirds plan to do so in the next 12 months



Currently, one-third of businesses around the world are automating 20-29 tasks, though nearly a quarter (23 percent) are forging ahead and automating more than 40 tasks. Interestingly, these levels of adoption are not just being confined to single departments. Advocates are sharing their knowledge across the business.

## BUSINESS DECISION MAKERS

Almost one-third of business decision makers have encouraged other departments to undertake automation on more than 10 occasions.



IT is seen by business decision makers as the most progressive department in deploying RPA (70%), followed by the finance team (39%).

Driven by the benefits already being realized by organizations, automation is growing at speed.

**92%** of business decision makers plan to extend use cases of automation across their business

This is matched by a high level of understanding on the part of those in senior positions. In turn, this has broadened perceptions of what RPA can offer to a business. Yet, there are still gaps to be filled when it comes to how the knowledge workers that form their teams comprehend the technology.

**94%** of business decision makers understand the benefits RPA can bring to their business (92 percent believe the same for Intelligent Automation)

**73%** of knowledge workers say they understand the benefits of RPA and more than a quarter (28 percent) of knowledge workers don't understand it

**76%** of business decision makers agree that RPA offers more to the business than just time and cost savings

Another gap exists when it comes to perceptions of how well the introduction of the technology has been communicated and planned.

**94%** of business decision makers believe they've communicated the rollout of automation technology to employees effectively

**73%** of knowledge workers believe that their employer has communicated the introduction of automation effectively

**88%** of business decision makers believe there is a clear plan in place within their organization for rolling out automation

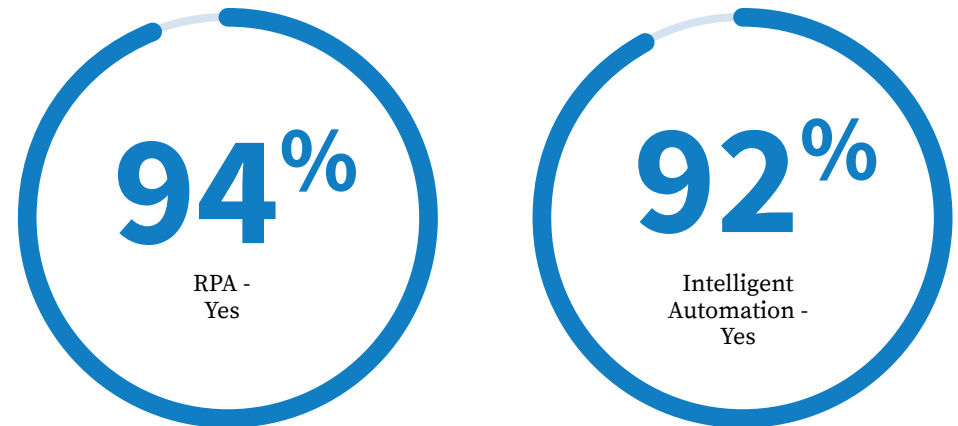
**70%** of knowledge workers agree

## ARE BUSINESS LEADERS AND THEIR EMPLOYEES ON THE SAME PAGE?

This pace of adoption is being driven by high levels of confidence amongst business decision makers. Knowledge workers are, however, significantly less likely to fully understand the benefits that RPA can bring to their organization.

### BUSINESS DECISION MAKERS

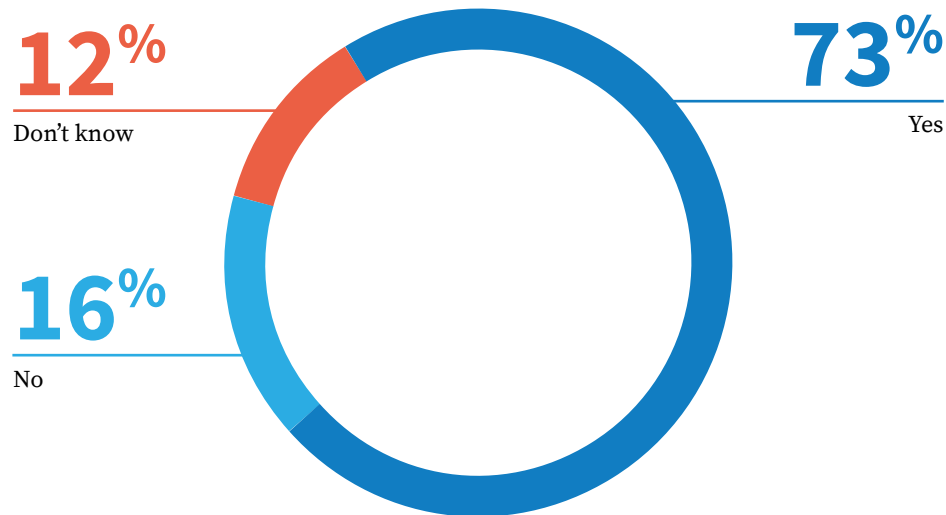
The large majority of business decision makers understand the benefits of RPA and Intelligent Automation



Giving employees a better grasp on the advantages of working with the technology will be vital for organizations to successfully augment the human workforce with the digital. If people are not clear on the benefits, it will be far more difficult to get them working in harmony with the digital workforce.

## KNOWLEDGE WORKERS

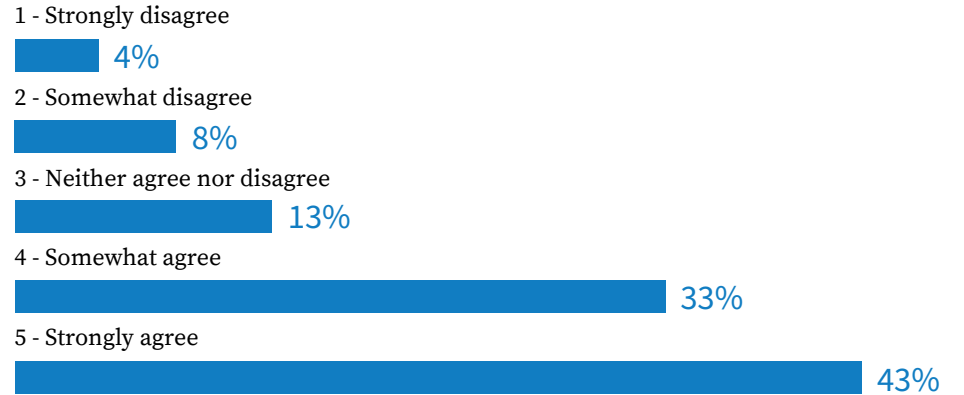
Knowledge workers don't have such a strong level of understanding of the benefits RPA can bring to the business



Despite this disparity, there is still a decent level of understanding, to the extent that business decision makers and their teams believe that RPA offers more to the business than just cost savings. This represents a significant inflection point, where businesses use technology to change the way they think as opposed to just completing processes quicker and more cheaply.

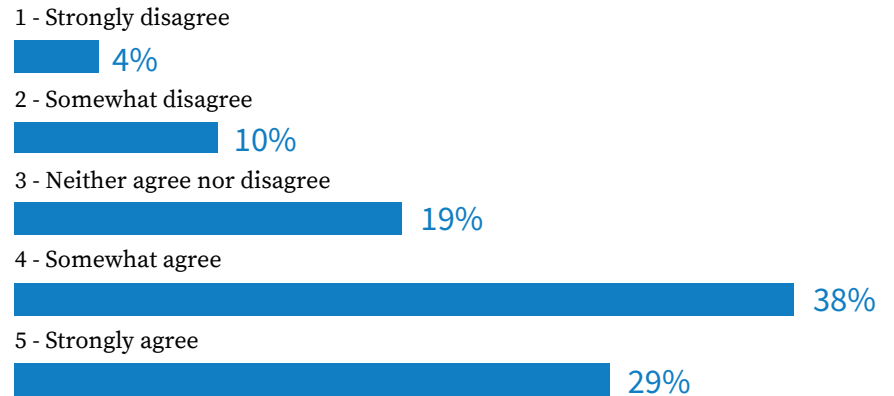
## BUSINESS DECISION MAKERS

76% of business decision makers agree that RPA offers more to the business than just time and cost savings



## KNOWLEDGE WORKERS

Similarly, 67% of knowledge workers agree that the automation of manual processes offers more to their business than just time and cost savings

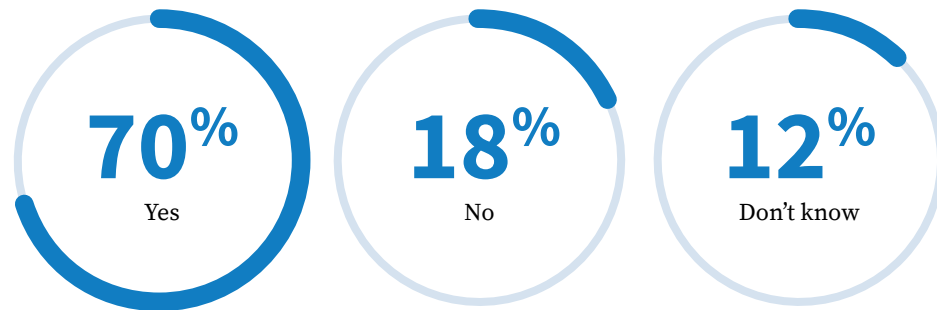


## ARE BUSINESSES AS EFFECTIVE AT IMPLEMENTING TECHNOLOGY AS THEY THINK THEY ARE?

Another gap that needs to be addressed within businesses is the perception of how smoothly deployments have been rolled out. Ninety percent of business decision makers feel that their organization is effective at deploying automation (52 percent of which say 'very effective'), compared to just 71 percent of knowledge workers. However, 62 percent of knowledge workers agree that their organization dedicates time to understanding how automation can grow and scale across the business, so many recognize that efforts are being made to improve.

### BUSINESS DECISION MAKERS

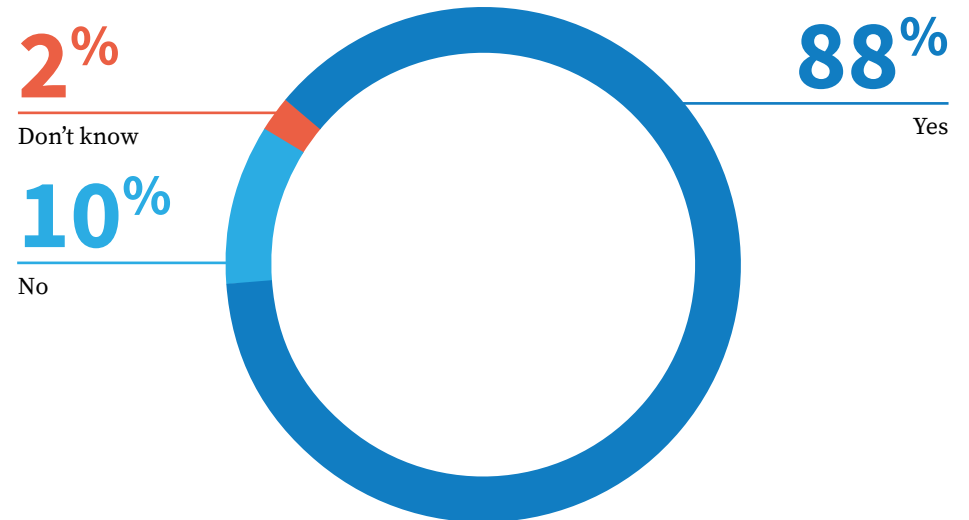
Fewer knowledge workers, just over two-thirds, believe that their organization has a clear plan in place for how it intends to use automation.



On top of this, 48 percent of knowledge workers agree that while their organization is aggressively rolling out automation, there have been problems with its implementation. This highlights how important it is for business leaders to stay in touch with their teams and understand the realities of working with the technology on the front line.

### KNOWLEDGE WORKERS

A large proportion of business decision makers say that there is a clear plan in place for rolling out automation within their organization.



Building on this theme, 94 percent of business decision makers believe they have communicated the rollout of automation technology to their employees either very effectively or quite effectively. Only 73 percent of knowledge workers agree with this assessment.

This shortfall in communication has manifested itself in a lack of clarity over plans for the rollout of automation technologies.

While it is evident that there are high levels of understanding regarding RPA and how it can transform a business, businesses will have to be careful to avoid complacency. If knowledge workers are not kept up to speed with how technology can improve their lives and how it is being rolled out, adoption will lag. Communication is key.



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# Is RPA a global game-changer?

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# What is the impact that RPA will have on the global economy?

Businesses have proved that they understand RPA and are finding more and more use cases for the technology. But how does this translate into the wider impact it can have on organizations and the economy worldwide?

**61%** of business decision makers feel their business is currently struggling to meet customer demand

**91%** of that 61 percent of business decision makers feel that automation would help solve the problem

**51%** Despite recognizing the importance of RPA in terms of meeting customer demand, more than half of business decision makers say their organization could remain 'very competitive' in the next 5 years with a purely human workforce

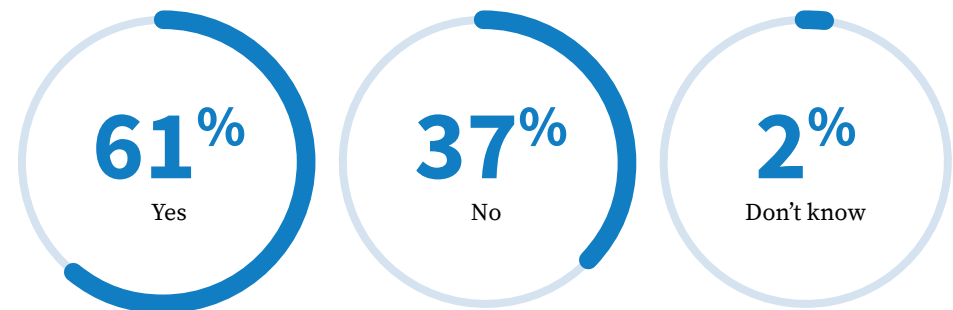
**88%** of business decision makers see RPA, and 83 percent see IA, as a solution to the global productivity problem

## HOW TO STAY COMPETITIVE

Almost every sector is faced with customers that expect high-quality delivery at speed and on-demand. And the majority of organizations are struggling to meet their expectations. However, for the most part, business decision makers see automation technologies as the answer, as do the knowledge workers who are directly facing the challenges posed by customers.

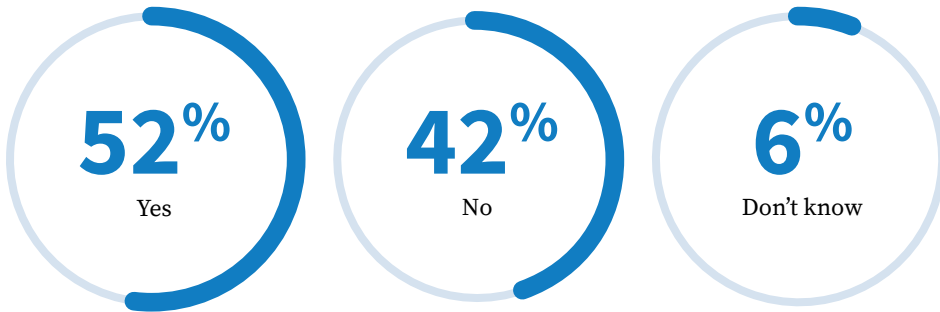
## BUSINESS DECISION MAKERS

More than half of business decision makers feel that their business is currently struggling to meet customer demand.



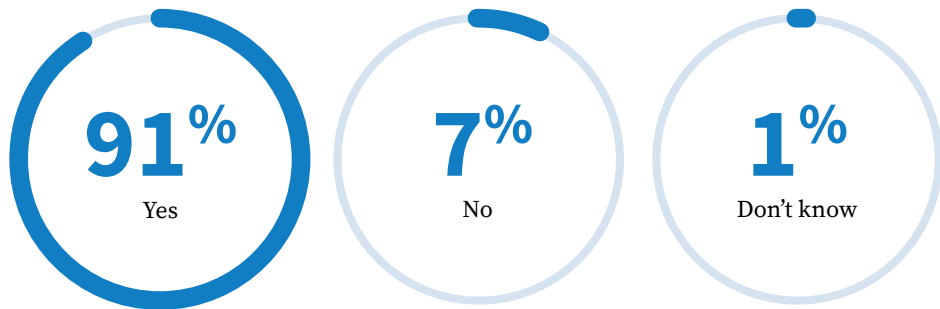
### KNOWLEDGE WORKERS

More than half of knowledge workers also believe that their organization is struggling to keep up with customer demands



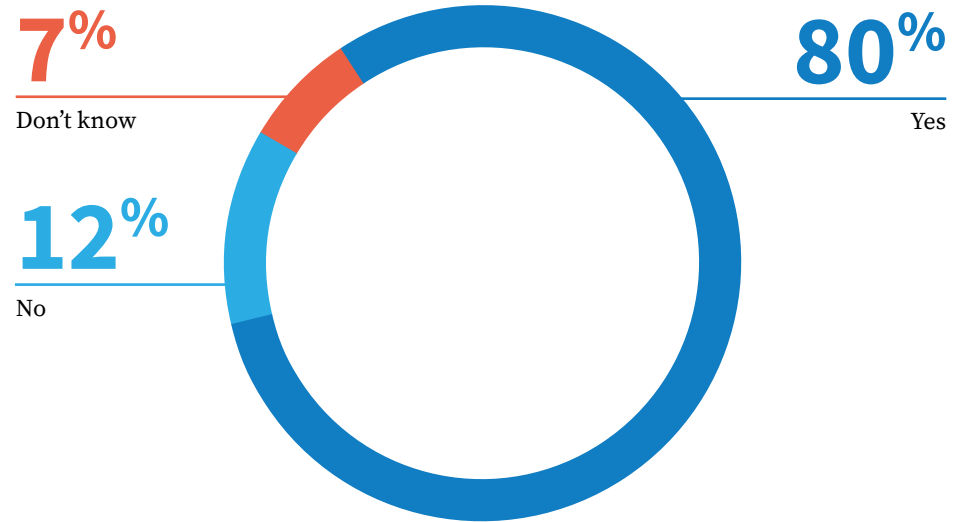
### BUSINESS DECISION MAKERS

The majority of business decision makers agree that automation technology would help to solve the problem of meeting customer demands



### KNOWLEDGE WORKERS

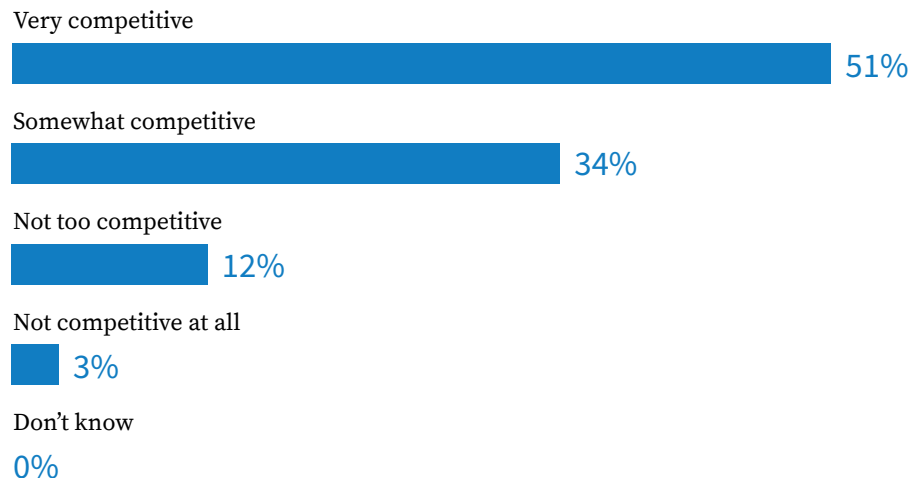
A significant proportion of these knowledge workers agree that automation technology would help solve this problem



Surprisingly, having identified it as a solution to their problems in meeting customer expectations, more than half of business decision makers still believe a purely human workforce can keep them competitive in the near future.

## BUSINESS DECISION MAKERS

According to business decision makers, their businesses will still be competitive in the next 5 years with a human workforce



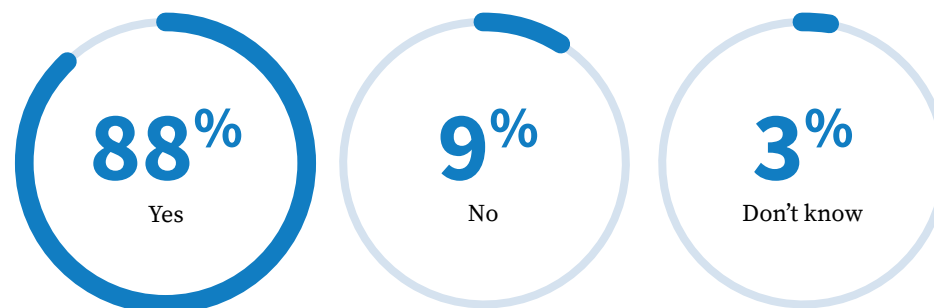
This shows that, despite the positivity surrounding the impact of RPA, some businesses are still not joining the dots when it comes to how this relates to their ultimate success in the market. It will be interesting to see how this changes as the industry matures.

## A GAME CHANGER FOR THE GLOBAL ECONOMY

Despite some organizations not making the link between automation and remaining competitive, the majority still stick to the broad view that RPA and IA provide a solution to the global productivity problem.

## BUSINESS DECISION MAKERS

A huge proportion of business decision makers see RPA as a solution to the global productivity problem



Similarly, two-thirds of business decision makers believe that RPA is very important in driving digital transformation (63 percent feel the same way about IA).

With this positive outlook, it is a fair assumption that adoption levels will continue to soar in the next 12 months. The key to maintaining this positivity is businesses being able to use the technology to its full effect to augment the human workforce.

A group of diverse business professionals in a meeting. In the foreground, a woman with long dark hair is smiling and pointing towards a screen. Behind her, another woman with blonde hair is also smiling. The background is slightly blurred, showing other people and computer monitors in a modern office setting.

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# What do your employees think?

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# Are your employees ready to work alongside a digital workforce?

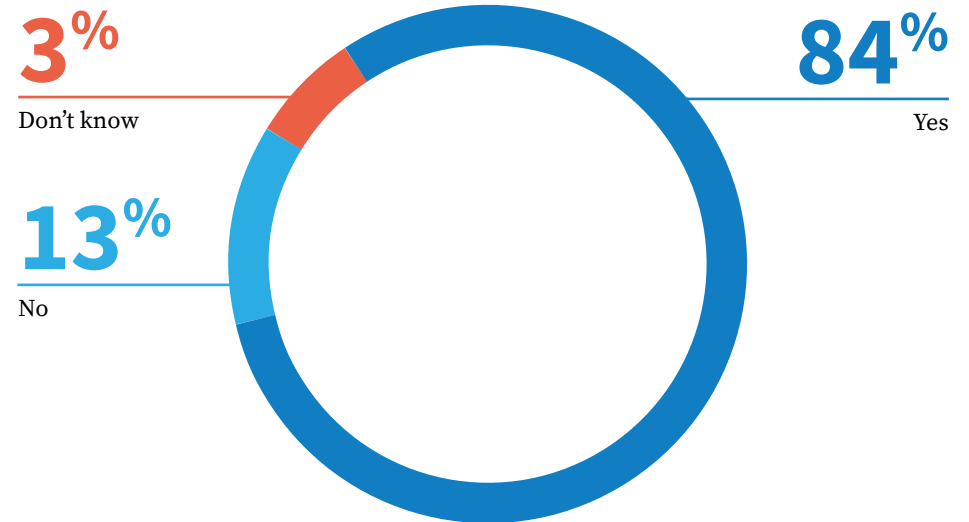
The huge economic impact that business leaders believe RPA is having cannot be realized without people. Businesses have to make sure that their employees are properly prepared to face this change in the way they work. If they are not, they risk missing out on making real progress.

Both business decision makers and their employees are unified on the fact that they believe they have the right skill set to work effectively alongside the digital workforce.

## BUSINESS DECISION MAKERS

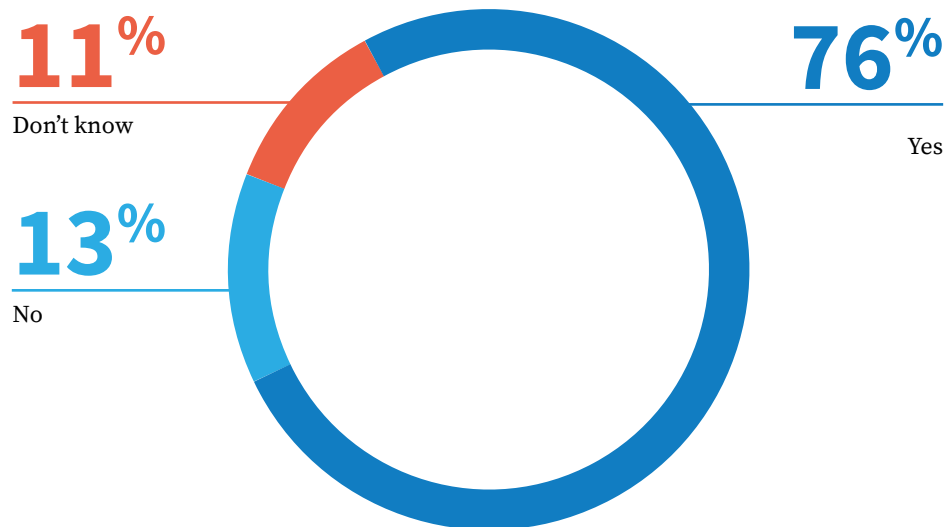
The majority of business decision makers agree that their employees have the right skills to work well alongside the digital workforce.

- 84%** of business decision makers believe their employees have the right skills to work effectively alongside the digital workforce
- 76%** of knowledge workers feel they have the right skills to work alongside a digital worker
- 83%** of knowledge workers are comfortable with reskilling for a change in their role at work
- 79%** of knowledge workers put the responsibility of re-educating/reskilling staff with the employer
- 78%** of knowledge workers say their organization provides the opportunity to learn new skills/qualifications when they introduce technologies that transform the job
- 68%** of knowledge workers appreciate the positive career opportunities that automation will provide (42 percent somewhat agree, 26 percent strongly agree)
- 78%** of knowledge workers believe they will have to acquire new skills in the next five years in order to remain employable



## KNOWLEDGE WORKERS

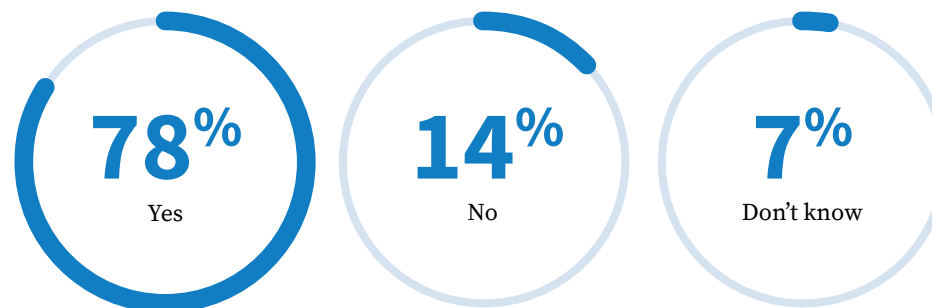
Over three-quarters of knowledge workers think they already have the skills to work with digital workers



As well as feeling prepared for this new style of working, knowledge workers are also very open to the possibility of altering their roles as a result of automation. Eighty-three percent say that they are comfortable with reskilling for a change in their role at work and business decision makers are aligned on the issue. Thirty-five percent of these business decision makers believe that 26-50 percent of their workforce is comfortable with this idea of reskilling, while a further 31 percent think that 51-75 percent are open to this.

## KNOWLEDGE WORKERS

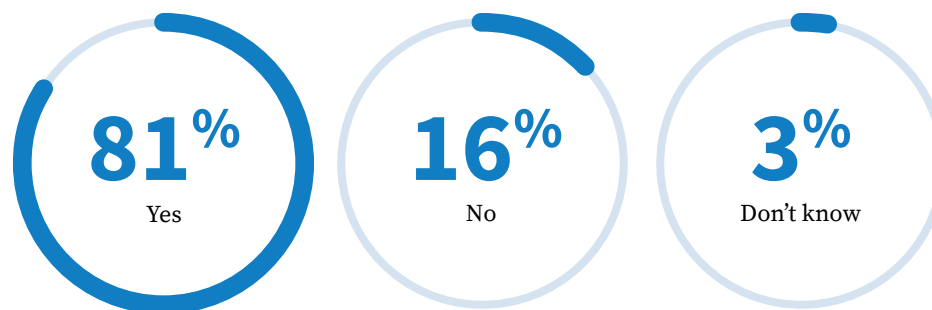
More than 3 in 4 knowledge workers state their organizations provide opportunities to learn new skills, when new technology is introduced



Pivotal to maintaining this open mindset is providing sufficient opportunities for people to develop professionally. In fact, 79 percent of knowledge workers put the responsibility of re-educating/reskilling staff firmly at the door of their employer. The good news is that the majority of organizations are taking this responsibility seriously.

## KNOWLEDGE WORKERS

The majority of knowledge workers say that their employers provide these opportunities on a continuous basis

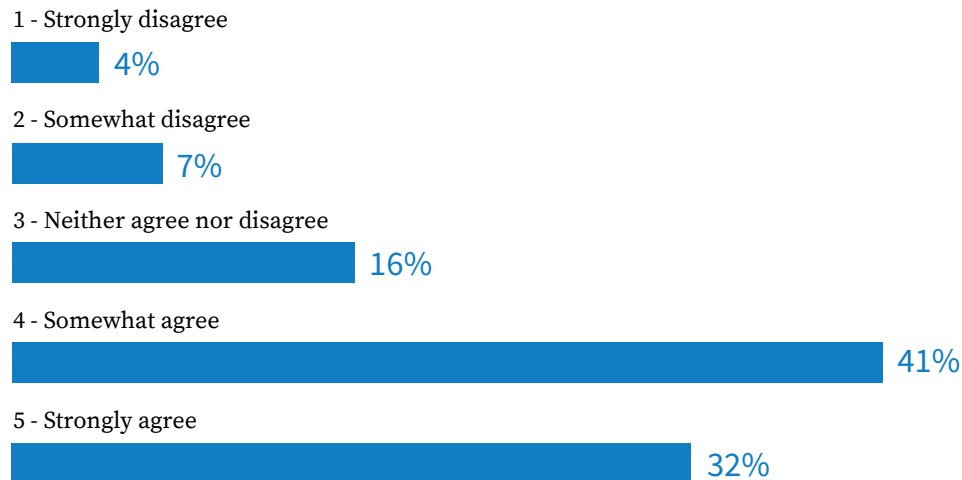


## HOW DO EMPLOYEES VIEW THE IMPACT OF RPA?

As well as being open to change, many knowledge workers are actually appreciative of the opportunities that the introduction of RPA is providing them with.

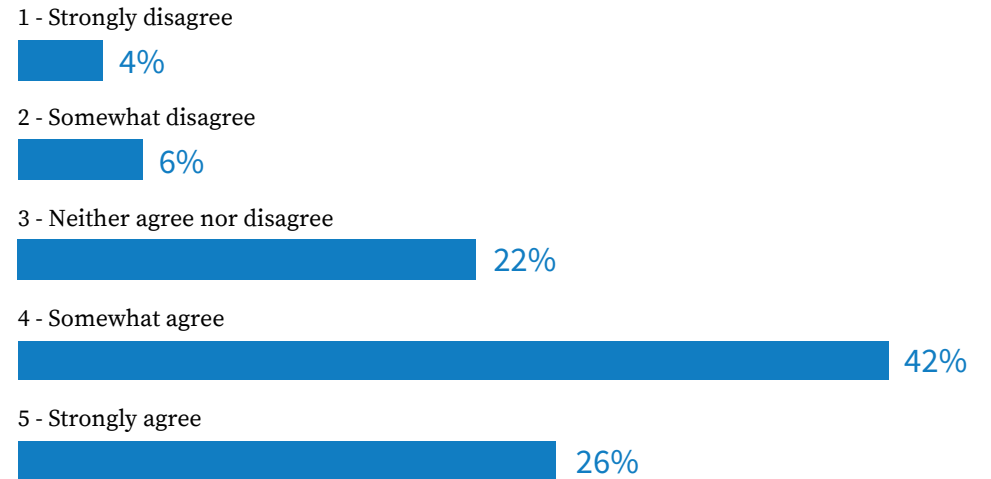
### BUSINESS DECISION MAKERS

73 percent of business decision makers agree that their employees appreciate the positive opportunities for career progression that automation provides



### KNOWLEDGE WORKERS

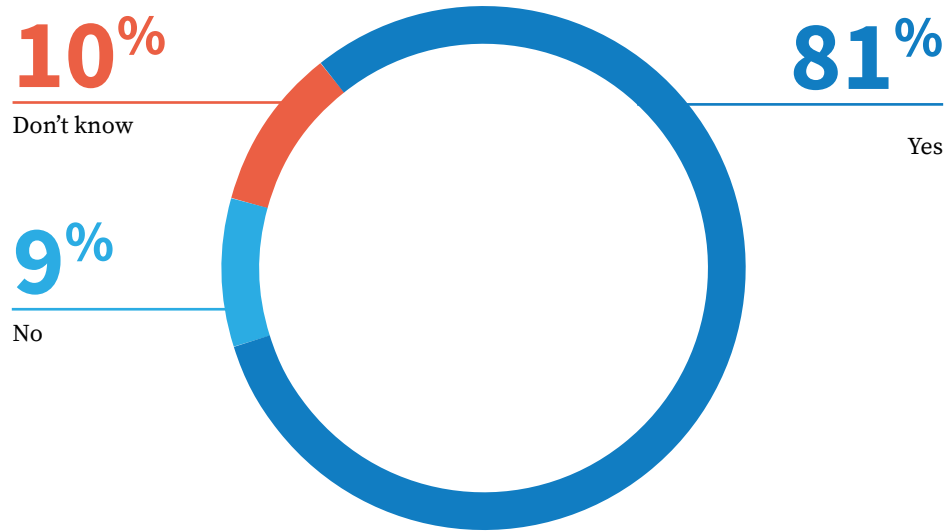
68% of knowledge workers agree that they appreciate the positive career opportunities provided by automation



This level of appreciation is likely to be tied with a good level of understanding of the impact that automation will have on their job roles. While this could improve, businesses and their employees are generally well aligned on how far this impact is understood. Seventy-three percent of business decision makers say that employees fully understand the impact automation will have on their job roles, compared to 65 percent of knowledge workers. Employees are also clear about the fact that they will need to acquire new skills for the benefit of their own career.

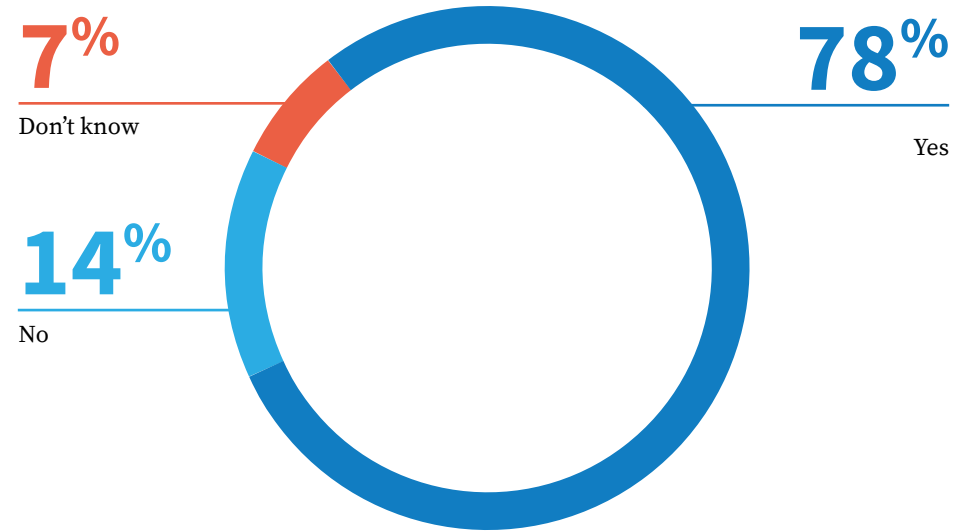
## KNOWLEDGE WORKERS

81 percent of knowledge workers are also happy that using technology to automate tasks will improve their working life



## KNOWLEDGE WORKERS

More than three-quarters of knowledge workers believe they will have to acquire new skills in the next five years in order to remain employable



There is an encouragingly positive mindset, shared by both business decision makers and knowledge workers, regarding how prepared businesses are for further automation. Many employees are actively embracing the changes they face in the workplace. This lays the foundations for organizations to approach change with positivity. Business leaders should not be scared about moving quickly – employees are ready.



How well is  
organizational  
change  
understood?

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# Are expectations being met?

To maintain the positive momentum businesses must work closely with their employees to ensure that RPA is easily incorporated into their working lives. So do businesses appreciate what needs to change and are management teams aligned with their employees regarding their expectations of organizational change?

**75%** of business decision makers are 'clear on exactly what the organization wants to achieve through automation' (35 percent somewhat agree, 40 percent strongly agree)

**57%** of knowledge workers agree that their organization has made it clear exactly what it wants to achieve through automation (37 percent somewhat agree, but only 20 percent strongly agree).

**76%** of business decision makers are actively changing company culture to incorporate the digital workforce - (45 percent somewhat agree, 31 percent strongly agree)

**60%** of business decision makers say their company culture needs to change but they don't know where to start (29 percent somewhat agree, 31 percent strongly agree)

**84%** of business decision makers believe they have to work on building trust between employees and the digital workforce

**68%** of knowledge workers believe that employers should be doing more to build trust

## IS THERE ENOUGH CLARITY BETWEEN MANAGEMENT AND THEIR EMPLOYEES?

There is a clear difference throughout this report, of business decision makers being more confident in their understanding and deployment of technology than knowledge workers. This trend extends to views on how the digital workforce has been integrated into operations. Seventy percent of decision makers believe that they have completed the integration seamlessly, while just over half (52 percent) of knowledge workers feel the same. Similarly, more senior members of the team are more likely to believe that there is clarity around what the organization intends to achieve through automation.

### BUSINESS DECISION MAKERS

75 percent of business decision makers agree that they are clear on exactly what the organization wants to achieve through automation

1 - Strongly disagree



2 - Somewhat disagree



3 - Neither agree nor disagree



4 - Somewhat agree

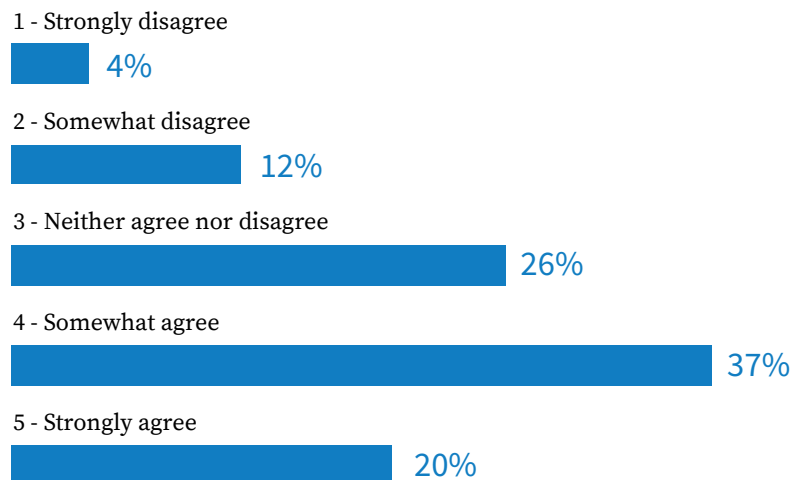


5 - Strongly agree



## KNOWLEDGE WORKERS

Just over half of knowledge workers agree that their organization has made it clear exactly what it wants to achieve through automation

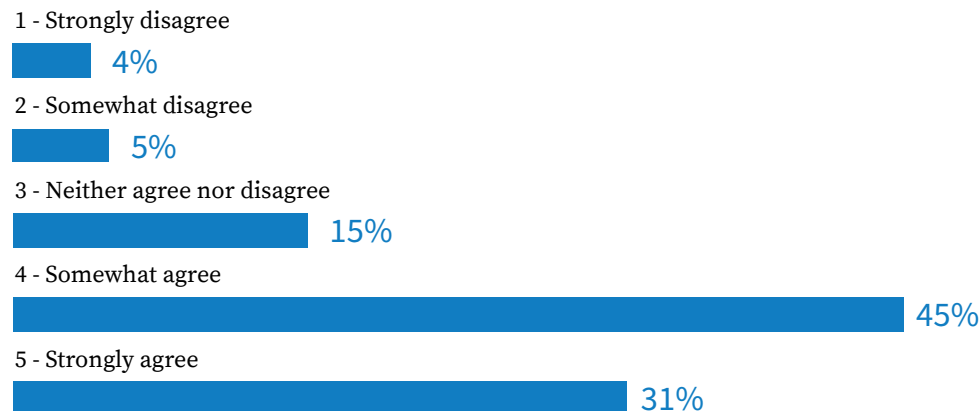


## IS CULTURAL CHANGE BEING EMBRACED?

For objectives to be met in the long-term there also needs to be clarity across the board on what needs to change within a business. Culture is at the heart of this shift. Fortunately, it is being recognized by organizations. Sixty-eight percent of business decision makers appreciate that they need to change company culture to make a success of technologies such as RPA. Many are already taking action in this regard, however, there is still a significant proportion of businesses that recognize the need for change but are unsure of what to do next.

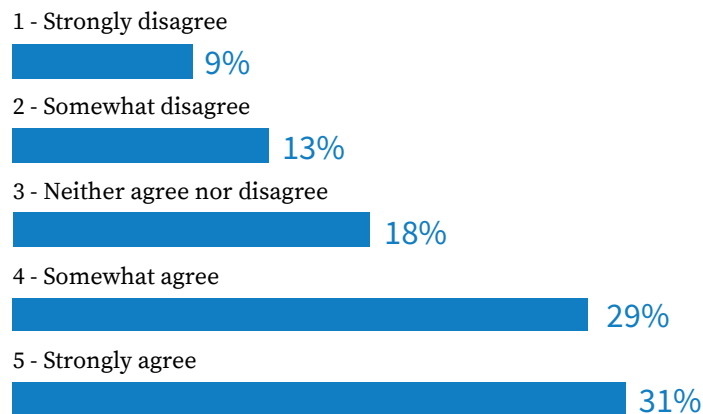
## BUSINESS DECISION MAKERS

76 percent of business decision makers agree that they are actively changing their company culture to incorporate the digital workforce



## BUSINESS DECISION MAKERS

Meanwhile, 60 percent of business decision makers agree that their company culture needs to change, but they don't know where to start



## KNOWLEDGE WORKERS

44 percent of knowledge workers agree that they are not confident the workforce will be able to adapt to working alongside software robots

1 - Strongly disagree



2 - Somewhat disagree



3 - Neither agree nor disagree



4 - Somewhat agree



5 - Strongly agree



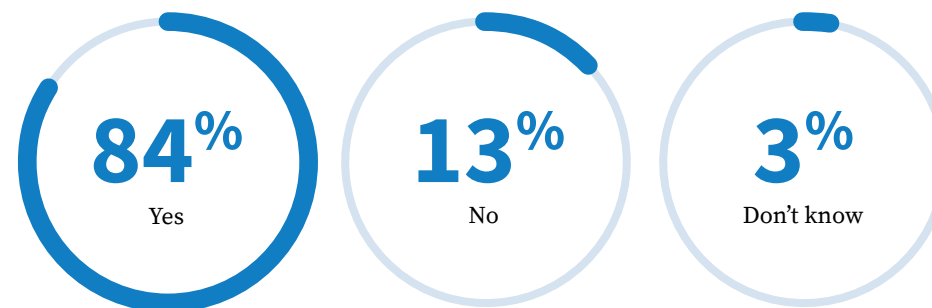
Any change to company culture has to be built on trust. Trust between management and their employees. Trust between employees and the new digital workforce. The overwhelming majority of business decision makers understand that the latter needs to improve.

Of those business decision makers who appreciate the need to build trust between their people and the digital workforce, 74 percent believe that improving internal communications would help, while 62 percent point to more in-depth training. Knowledge workers are thinking along the same lines, with 67 percent highlighting communication as the main area for improvement.

A degree of trust already exists, seeing as 73 percent of knowledge workers trust software robots, either now or in the future, to complete tasks correctly. Sixty-one percent of these workers are perfectly comfortable with software robots being part of the workforce. This does leave just over a fifth (22 percent) who neither agree or disagree on the point of being happy working alongside the digital workforce. This is still a high level of uncertainty that businesses will have to recognize and act upon.

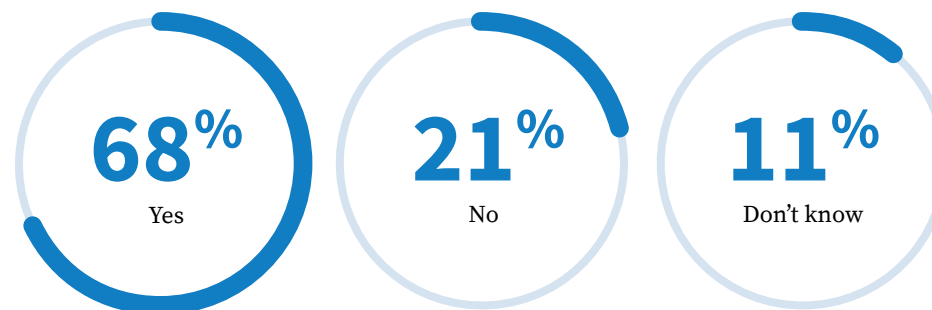
## BUSINESS DECISION MAKERS

84 percent of business decision makers believe they need to work on building trust between their employees and the digital workforce



## KNOWLEDGE WORKERS

Meanwhile, more than two-thirds of knowledge workers believe their employers should be doing more to build trust between them and the digital workforce



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# Contact us

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There is a palpable sense of positivity around RPA and IA, and how these technologies can not only transform businesses but economies. Where there is such optimism, however, organizations must guard against complacency.

We are seeing a significant lack of correlation between how business decision makers view the introduction of automation in the workplace, and how their team members perceive it. Levels of understanding of the technology itself and the benefits it will bring to an organization, have to improve. As does clarity with regards to how the technology is deployed and how impact and objectives are communicated.

This technological transformation of how we work and think as organizations, places the human at its very center. People will continue to be the element that sets a business apart. Using RPA to give them the scope to innovate and make this difference will be at the core of every business' strategy. How will you make this a reality?

Find out more at [www.blueprism.com](http://www.blueprism.com)



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US:+1 888 757 7476

## About Blue Prism

In this digital era where start-ups are constantly disrupting markets, only the most agile and innovative enterprises survive and thrive. At Blue Prism, we pioneered Robotic Process Automation (RPA), emerging as the trusted and secure intelligent automation choice for the Fortune 500 and public-sector market. Now we bring you connected-RPA supported by the Digital Exchange (DX) app store—marrying internal entrepreneurship with the power of crowdsourced innovation.

Blue Prism's connected-RPA can automate and perform mission critical processes, allowing your people the freedom to focus on more creative, meaningful work. More than 1,000 major enterprise customers leverage Blue Prism's digital workforce, empowering their people to automate billions of transactions while returning hundreds of millions of hours of work back to the business. Visit [www.blueprism.com](http://www.blueprism.com) to learn more about Blue Prism (AIM: PRSM).

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A photograph of a smiling woman in a cafe apron handing a card to a customer. The image is split by a diagonal line. The left side is a dark blue overlay with the word 'Methodology' in light blue text. The right side shows the woman in a cafe setting.

# Methodology

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The research was conducted by independent research firm Sapio, based in the United Kingdom on behalf of Blue Prism. Blue Prism surveyed 1,442 business decision makers (those with a final say over budget spend of technology implementations) in the following countries: UK (209), US (400), Japan (225), Australia (205), France (200) and Germany (203). As well as 3,521 knowledge workers (workers whose main capital is knowledge, whose job is to “think for a living” and who have access to technology as part of their day-to-day jobs) in the following countries: UK (500), US (1013), Japan (503), Australia (504), France (500) and Germany (501). All respondents worked in organizations with 250+ employees, with higher minimum employee levels for some countries and respondent types. In addition, the respondents worked in companies in which automation had already been adopted.

All interviews were conducted online during December 2018.