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STATE OF
Process
Orchestration

24





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Executive summary

Process automation investments continue to hold steady year-over-year, even during an economic downturn. Both IT and business leaders see the value in process automation when it comes to accelerating their digital transformation efforts. This year’s report shows that organizations have seen improvements in operational efficiency, customer experiences, and business growth due to their investments in digital process automation, as they deploy process orchestration within and across business areas.





In addition, this year’s State of Process Orchestration report is the first to shine a light on automation maturity, starting with the earliest process design and modeling stages. A failure to align stakeholders on priorities and proprietary vendor lock-in creates silos, to the extent that more than half of automation initiatives can’t keep up with the rate of change in the organization.

As with last year’s report, business-critical processes are becoming more complex to maintain, visualize, and improve. The headwinds of legacy technology, combined with process complexity and a lack of control, are preventing organizations from achieving their optimal state of process automation and orchestration maturity.

The good news is that organizations have expressed a desire for IT and business teams to collaborate more effectively, which is the first step toward deriving greater strategic business value from automation. Moreover, they understand the need to align their process automation efforts with larger strategic business value.

We’ll dive into these trends in this report, detailing how organizations have moved past “fixing what’s broken” with their processes, and are progressing toward more strategic, scaled adoption of process automation. We’ll show what’s holding organizations back from achieving their business goals around digital transformation and value-based measurement of their process automation efforts, and the deeply entrenched role process orchestration plays in this picture.

2023 VS. 2024 CHANGES

-  51% say that processes spanning multiple systems is a reason for process automation complexity in 2024, vs. 45% in 2023.
-  52% say process automation cannot keep up with the rate of change in the organization in 2024, vs. 64% in 2023.
-  34% say lack of budget is a roadblock to achieving digital transformation in 2024, vs. 25% in 2023.
-  68% say miscommunication between teams leads to the wrong thing being built/rolled out in 2024, vs. 74% in 2023.



Process automation remains vital to digital transformation, business growth, and efficiency

Despite economic challenges, investments in process automation in 2024 are holding strong. This year, IT decision-makers say 50% of their organization's processes are automated. In addition, 90% of IT decision-makers say their organization will increase investment in automation in the next 24 months (vs. 88% in 2023).

HOW MUCH WILL AUTOMATION INVESTMENTS INCREASE?

23% say
between 5-9%

40% say
between 10-19%

26% say
between 20-30%

Why have automation investments increased, as other IT investments have been scrutinized in a turbulent economy? Organizations can prove the ROI of automation. **Almost all IT decision-makers and business leaders (96%) say automation is vital to digital transformation, consistent with previous years' reports.**

- ✓ 91% say they've seen increased business growth due to process automation within the last year
- ✓ 95% say automation has helped achieve operational efficiency
- ✓ 93% say automation has helped improve customer experiences

Even with its proven value and increased investment, the actual percentage of automated processes has decreased from 2023 to 2024. Why aren't organizations automating more? Many teams detail challenges with organizational misalignment, integration between technologies, and more. In other words, automation is complex, and many current methods of automating fall short of business expectations.

Challenges with digital transformation and automation

Despite progress when it comes to ROI, organizations continue to experience misalignment and scalability challenges when it comes to digital transformation and automation.

WHAT'S STANDING IN THE WAY OF ACHIEVING DIGITAL TRANSFORMATION GOALS?

- 42% of IT decision-makers say a lack of integration between technologies. In fact, 94% agree that the ability to immediately integrate new platforms and technologies is very important to the organization
- 35% say problems with communication between teams
- 35% say not enough budget (a significant increase from 25% last year)

Breaking down these challenges a bit more, integration remains one of the most prominent concerns. This is no surprise, considering the level of adoption of new technologies has skyrocketed over the past few years. **In fact, 60% of business and IT decision-makers estimate that 26 or more systems are involved in their organization's automation implementation.** Process endpoints can be diverse — spanning people, systems, and physical devices. Many of these endpoint diversity issues can be resolved with an end-to-end process orchestration strategy, instead of focusing on local automation.

TOP THREE CONTRIBUTORS TO PROCESS COMPLEXITY IN 2024



51% of IT decision-makers say having to span multiple systems



39% say legacy systems are difficult to connect to. 62% agree legacy tech is standing in the way of achieving their hyperautomation goals



36% have to deal with human logic

When it comes to communication problems, the impacts can be severe: 68% of IT decision-makers and business leaders say that miscommunication between teams leads to the wrong thing being built and rolled out to customers. A whopping 64% say bad experiences caused by these miscommunications drive customers to competitors. Where does this breakdown originate? **Over half (58%) point to a disconnect between IT decision-makers and business leaders around their processes.**

While this data point is concerning, it's a solvable problem: 73% say that the time it takes to design and agree upon process changes is a bottleneck at their organization. Plus, 64% say that process design is locked behind proprietary languages and/or tooling. By aligning on universal, business-friendly standards such as BPMN and DMN in the process design phase, organizations can overcome these communication issues and achieve alignment across teams.

Change management continues to be a challenge in 2024. 52% of IT decision-makers and business leaders say automation initiatives cannot keep pace with the rate of change at their organizations.



Scaling automation

As organizations seek to scale their automation efforts, maintenance and visibility remain the top challenges. To avoid bad customer experiences, 92% of IT decision-makers and business leaders cite a need for increased scalability and/or resilience. While there has been some progress in the right direction toward maintaining and visualizing processes, these barriers still remain in 2024.

- 68% say as more tasks become automated, real-world mission-critical processes are becoming more difficult to maintain (down from 72% last year)
- 59% say as more tasks become automated to meet CX demands, it is harder to visualize end-to-end processes (down from 69% last year).

To effectively meet these challenges and further scale their adoption of automation, organizations should consider process orchestration as a vital part of their hyperautomation tech stack.

94% of IT decision-makers and business leaders say process orchestration plays a role in accelerating digital transformation.

Automation practitioners' opinions differ from leadership

This year, the survey explored software architects' thoughts on automation and process orchestration. The results showed that these practitioners' opinions often differed from business leaders and IT decision-makers – suggesting a split between what's actually happening and leadership's perception.

- 30% of business leaders say that they have incorporated process orchestration organization-wide, compared to 21% of software architects.
- Software architects (88%) are more likely than IT decision-makers (77%) and business leaders (78%) to say their company has moved past fixing what is broken and now needs to initiate broad strategic processes to bring more tangible value to their organization.
- Software architects (78%) are more likely than IT decision-makers (67%) and business leaders (65%) to say as more tasks become automated, real-world, business-critical processes are becoming more complex to maintain. And, as more tasks become automated to meet CX demands, it is harder to visualize end-to-end processes (71% software architects vs. 57% IT decision-makers and 61% business leaders).
- Software architects (66%) are more likely than IT decision-makers (57%) and business leaders (55%) to say there is a disconnect between IT and business leaders around their processes.
- Software architects are more likely than IT decision-makers and business leaders to say the time it takes to design and agree upon process changes is a bottleneck at their organization (81% vs. 72% and 72%) and automation initiatives cannot keep pace with the rate of change in today's organizations (61% vs. 51% and 49%).

Process orchestration is driving automation maturity

Process orchestration coordinates the various moving parts (or endpoints) of a business process, and sometimes even ties multiple processes together. Process orchestration helps teams work with the people, systems, and devices they already have – while helping organizations achieve success with end-to-end automation.

ORGANIZATIONS AGREE THAT THERE IS ROOM FOR IMPROVEMENT TO DRIVE SUCCESS IN THE FOLLOWING AREAS:



97%: improving business-critical processes



97%: empowering business roles to understand how they fit into the workflow



96%: understanding how processes drive organizational value



96%: defining organizational, value-based metrics to support things like cost savings, better compliance, and more customers



95%: supporting digital business transformation through the delivery of better business outcomes



Process orchestration can help organizations contend with the challenges that stand in the way of their desired automation outcomes, and is a key driver for automation maturity. With an advanced process orchestration maturity posture, teams can effectively align technical outcomes with business goals. On a more granular level, process orchestration systems can help teams maintain visibility and control into their entire hyperautomation tech stack — even if their processes are complex and span multiple endpoints.

Most IT decision-makers surveyed agree (86%) that they need better tools to manage how their processes intersect. Visibility is a key part of this management challenge; 61% agree they need a place to see processes all in one place. And, 56% say they have a lot of automation in place, but no good way to control it all.

TOP THREE CHALLENGES WITH PROCESS ORCHESTRATION ACCORDING TO IT DECISION-MAKERS

- 51%: having to integrate multiple systems (vs. 44% last year)
- 30%: lack of effective communication between IT and business leaders (vs. 23% last year)
- 28%: long-running processes 28% (vs. 35% last year)

As many teams consider how to scale automation efforts, process orchestration maturity is on the rise. This year, organizations are adopting process orchestration at scale, and are considering the role orchestration plays in their larger business strategy.

In fact, process orchestration adoption is expanding at many companies:



25% have incorporated it into a single use case



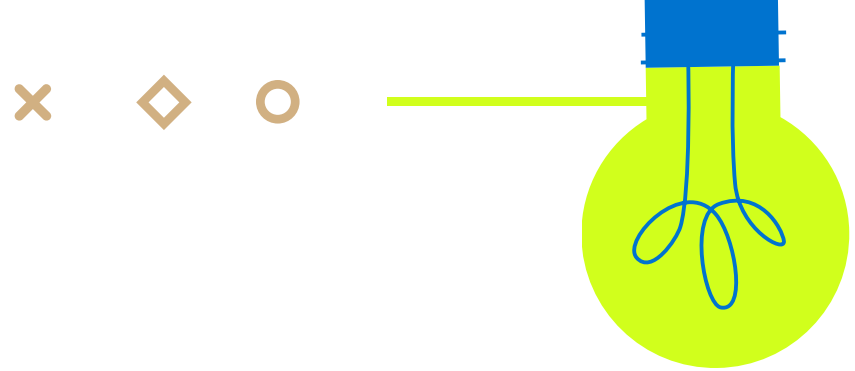
47% have incorporated it across multiple use cases and several functional areas/departments



22% have incorporated it organization-wide

More than half (52%) of IT decision-makers and business leaders say they have not reached the level of maturity to achieve end-to-end process automation. However, there has been major progress in this realm: **79% say the company has moved past fixing what is broken, toward initiating strategic processes that bring tangible value to the business.**











Advancing process orchestration maturity: next steps and guidance

Organizations with a high level of maturity in their process orchestration lifecycles achieve strategic, widespread adoption of end-to-end automation, aligning it with their specific business objectives and initiatives. [According to Deloitte](#), 92% of advanced automation adopters are currently using or planning to incorporate end-to-end automation into their strategies over the next three years.

Advancing process orchestration maturity can help organizations avoid many of the challenges detailed in the survey above, including the challenges involving:

-  IT/business alignment
-  Scaling automation
-  Gaining visibility into end-to-end processes
-  Managing complex processes, or processes with multiple endpoints
-  Aligning automation outcomes with business value
-  And more.

A single project is a great starting point for process orchestration, but highly mature organizations think beyond a project basis toward strategic, scaled adoption. Here are some recommendations for organizations looking to improve their process orchestration maturity in 2024.

Leverage centers of excellence (CoE) to achieve alignment among IT and business stakeholders

For many teams, a decentralized CoE can be a powerful resource for scaling automation across the organization. Rather than operating in a centralized “command-and-control” model, a decentralized CoE provides enablement, training, tools, and resources to adopt process orchestration organization-wide. Plus, a CoE can help set the process orchestration strategy with business stakeholders.

As discussed above, another powerful tool to achieve IT and business alignment is a business-friendly process modeling framework, such as BPMN or DMN. Paired with process orchestration technology, teams can use these open standards to gain visibility into the health of their processes, and strive for continuous feedback/improvement.

Look to align automation success with business value

Strategic, scaled adoption often requires aligning process metrics with business KPIs. Measure success in terms of both the process itself, and the business value it generates for the organization.

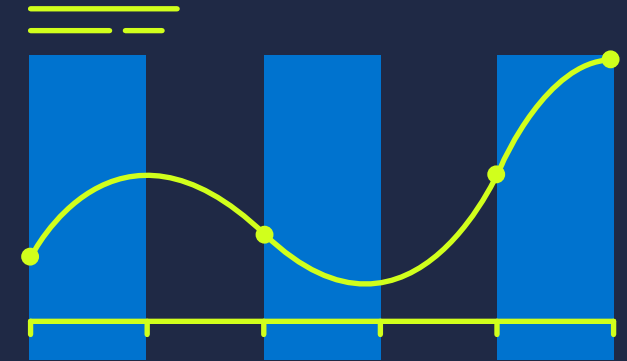
For example, an insurance company may want to decrease claim processing speed to remain in line with industry standards. While speed is important, a business KPI that aligns with this goal might be to reduce customer churn rates. Measure both to understand the true business impact of your process improvements.

Adopt a strategy of continuous process improvement

Think of processes in terms of how you'd think of an agile development lifecycle. In other words, continuously monitor processes, identify bottlenecks, and determine areas for improvement. Improvements can happen if an automated process isn't performing as expected, or if a process must change to adapt to new customer or business requirements.

Leverage machine learning-ready datasets to understand how process data correlates to other business data. Based on these correlations, you can make more targeted improvements. In addition, seek regular feedback from both IT and business stakeholders to ensure that processes are meeting business needs.

Achieving an advanced level of maturity in process orchestration will help you move closer to the ultimate goal of strategic and widespread automation adoption. Highly mature teams derive greater benefits from their automation and orchestration initiatives compared to others. Their endeavors are closely attuned to achieving specific business objectives, distinguishing them as leaders on the path to achieving success in digital transformation.



Read More

THE PROCESS
ORCHESTRATION
MATURITY MODEL

[Get the Guide](#)

About Camunda

Camunda enables organizations to orchestrate processes across people, systems, and devices to continuously overcome complexity and increase efficiency. With Camunda, business users and developers collaborate using BPMN to model end-to-end processes and run sophisticated automation with the speed, scale, and resilience required to stay competitive. Hundreds of enterprises such as Atlassian, ING, and Vodafone design, orchestrate, and improve business-critical processes with Camunda to accelerate digital transformation.

To learn how to orchestrate and automate complex processes in a new way, visit camunda.com

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About the study

Camunda commissioned Regina Corso Consulting to conduct a survey among IT decision-makers, business leaders, and software architects to understand the state of process automation. Some questions are trended from a previous survey on the same topic.

This survey is among 866 respondents in total with 607 IT decision-makers with 252 from the United States, 128 from the United Kingdom, 127 from Germany and 100 from France, 158 business leaders with 75 from the United States and 83 from the United Kingdom, Germany and France combined and 101 software architects with 80 from the United States and 21 from the United Kingdom, Germany and France combined. All respondents are at least somewhat involved in process automation at their company with at least 250 employees. This survey was conducted online between September 20 and October 4, 2023.

