

Automation Trends And Practical Application

Craig Le Clair

BOLD
AT
WORK

Process Transformation Has A New Focus



End-to-end
orchestration



Automation
Fabric Goals

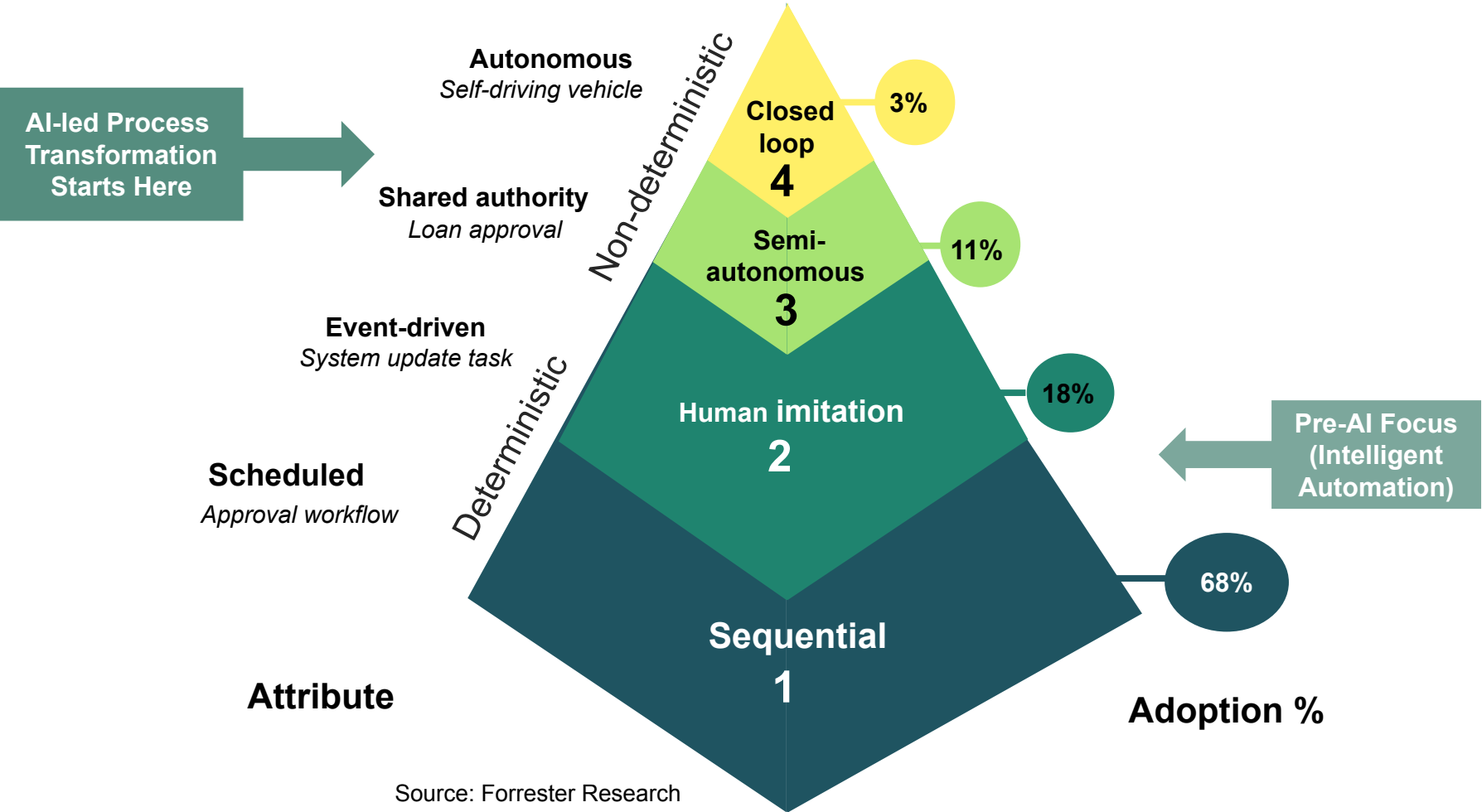


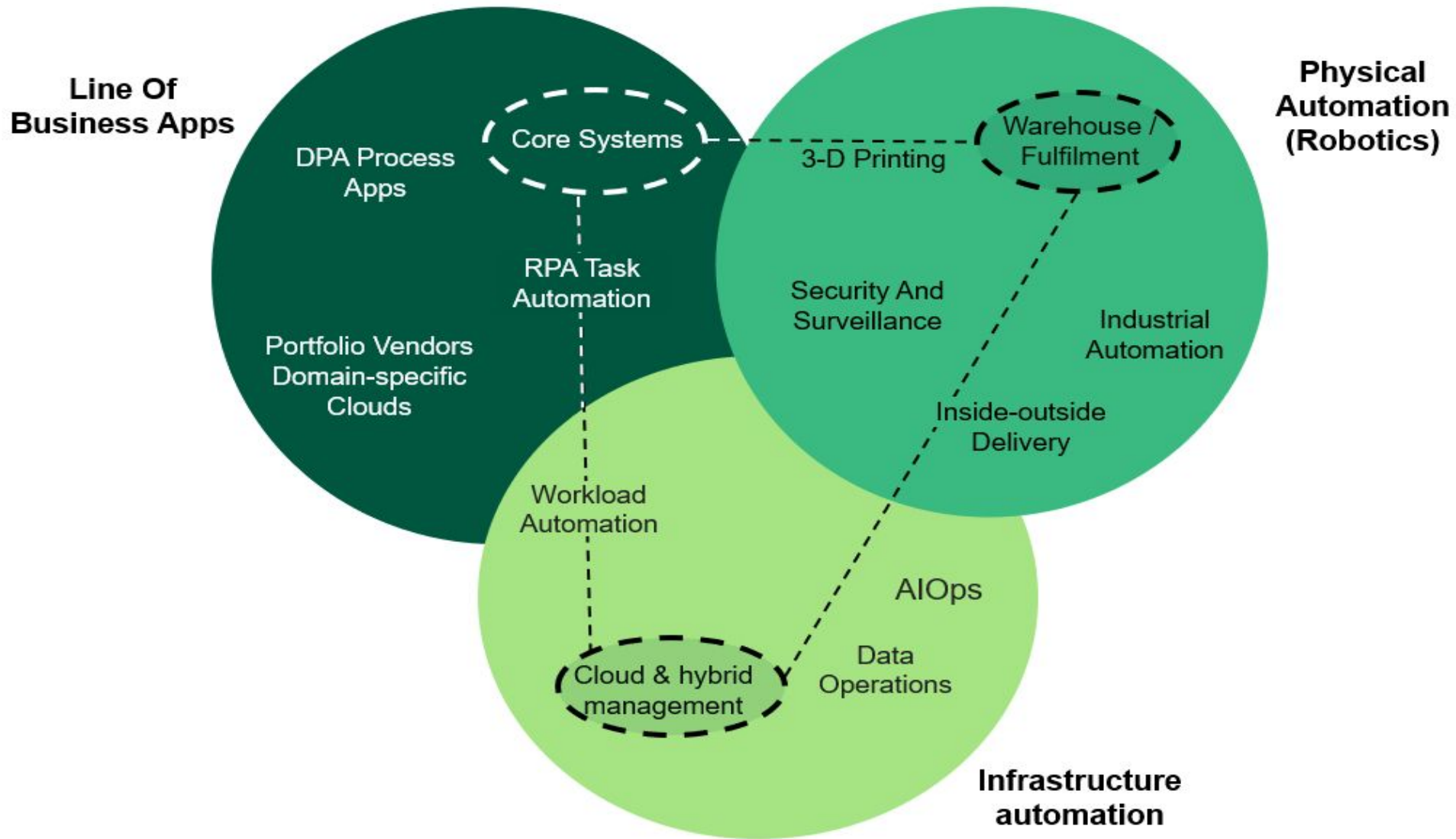
DPA
Governance

Realize the importance of endpoint orchestration

Challenge		Typical comment
Endpoints remain outside an application domain that is difficult to connect	-----	“I would like to connect my e-commerce front-end order app to the warehouse management systems, but I can’t get there from here.”
Growing islands of automation	-----	“I’m automating at an accelerated rate across siloed line of business (LOB) apps, as well as in IT.”
Limited visibility for the end-to-end process	-----	“I’m connecting endpoints with siloed and custom integration.”
Difficulty integrating automation tools with other infrastructure	-----	“Our incumbent automation tool didn’t easily integrate with their other applications and data sources. Manual workarounds were needed to complete workflow automations.”

Orchestration Will Combine Level 1 through 4 Process Patterns





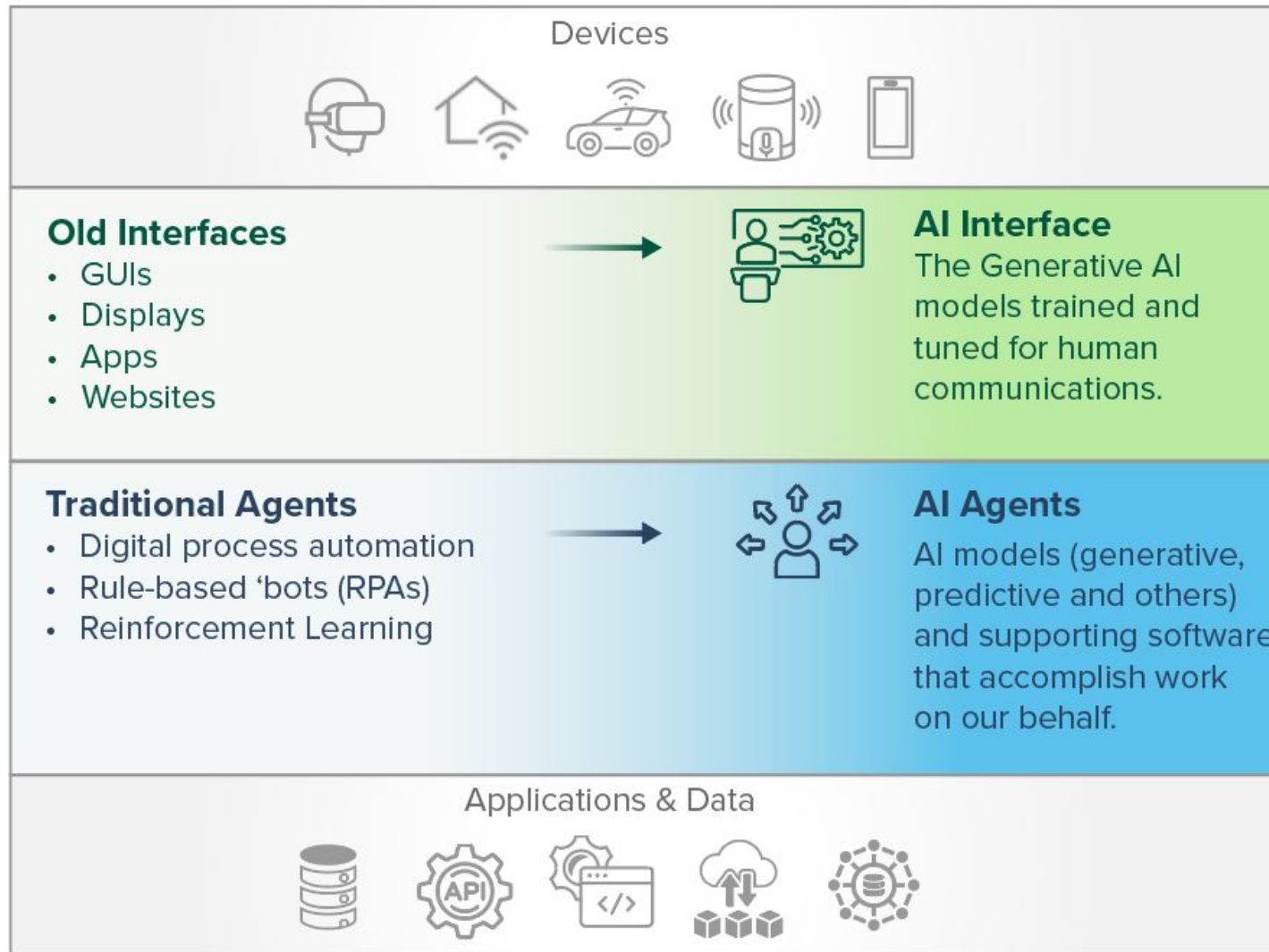


Automation Fabric Goals

“Over the next five, 10, and 15 years, 8 billion people will say goodbye to a complex web of isolated apps, sites, and databases as AI dissolves the friction between humans and technology.”

Forrester Research

AI computing unleashes disruption



Disruptors will build new platforms, services and experiences right here

Source: Forrester Report, "Change The Interface; Change The World"

Fabric Goals Will Require Awareness Of Agentic Process Management And AI Agents

AI Agents

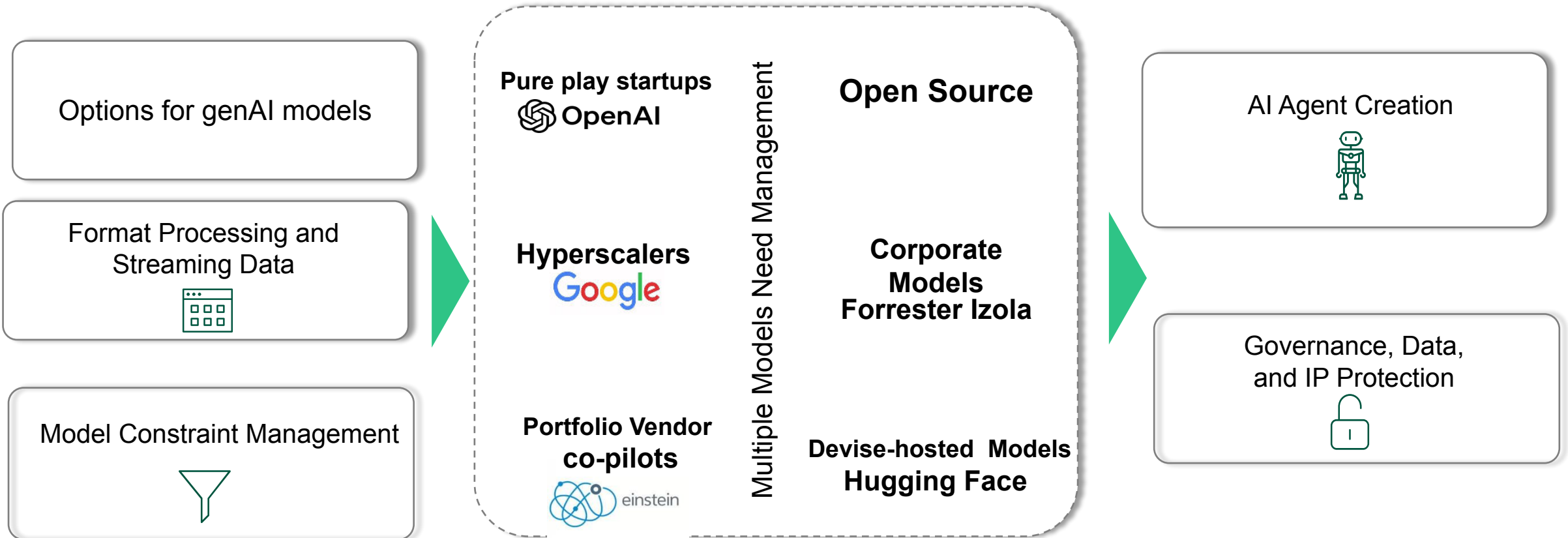
General AI systems trained to act on behalf of an enterprise or individual, performing tasks, making decisions, and interacting with data or other systems autonomously or semi-autonomously. “

Agentic AI Systems

Agentic AI is a subfield of AI focused on creating autonomous systems, that pursue complex goals with limited or no human intervention.

From APIs and Bots to Managing Models

The Five Must Have capabilities for APM



Five Important AI Agent Use Cases Will Emerge

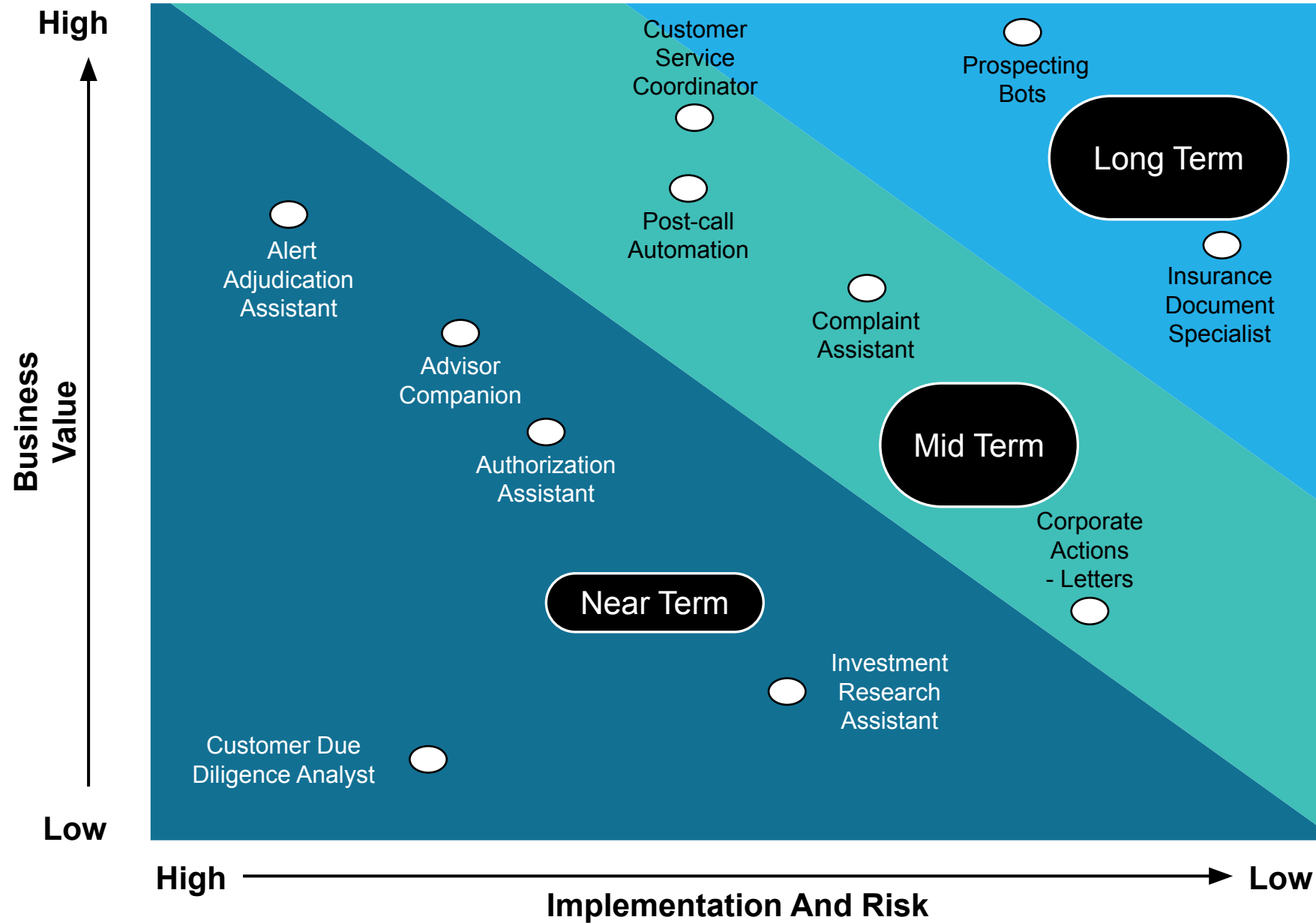
FIGURE 1

Forrester Groups AI Agents Into Five Types

AI agent	Example
Customer-facing agents	Virtual agents for self-service
Employee support agents	RPA digital workers
Consumer advocacy agents	Digital doubles
Enterprise automation agents	TuringBots
Organizational stewardship agents	Fiduciary agents

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AI Agents in Financial Services Are Coming



Platforms Will Specialize In Different Agent Use Cases

DPA Will Focus on Long-running Processes With Strong Action Components

AI Agent Platform	Primary Agent Use Case	Strengths
<i>General-purpose Co-pilots</i>	Consumer-facing agents Employee support agents Consumer advocacy agents	Natural Language Processing Self-operating AI agents Discreet tasks.
<i>Intelligent Automation (DPA/RPA)</i>	Employee support agents Enterprise automation agents Organizational stewardship	Strong “action” features Long-running workflow Task Automation Process Improvement
<i>iPaaS Automation</i>	Enterprise automation agents	Short-run workflow Data and Integration-centric automation
<i>Domain-specific agent frameworks</i>	Employee support agents Organizational stewardship	Training specific models Governance, Cost Efficiency.



DPA Governance

15 DPA Governance

 Tools designed for business users to create automations have advanced the need for governance. GenAI will accelerate this trend.

 A process system of record; application access permissions; strong audit features, and KPIs to control misuse and application sprawl; active licenses and pipeline status

 Automation COEs set the governance tone

 Help with the process automation roadmap



Use case selection challenges

Challenge	Typical comment
Integrating with existing work patterns to incorporate large language models (LLMs)	“There are change management issues. Younger staff are eager to try LLMs, while the less young resist the change more.”
Riskier use cases	“Certain use cases have risks we’re not comfortable with. Routing and classification risk misdirection.”
Lack of confidence to complete a straight-through process	“In a straight-through process, the automation must be perfect, but if generative AI (genAI) is a part of the process, such as review translation or summarization, the risk is less.”

AI data challenges are appearing

Challenge

Typical comment

Creating the right input processing to achieve the outcome

“Don’t attempt to build the models yourself. Find a partner that was already doing AI long before the recent genAI hype...”

Simon Knowles, head of technology, vabble

Verifying the output from the LLM model

“We plan to use genAI for investment research, but it must blend with internal syndicated research, like Lipper or Morningstar. We want LLM power plus reliable sources.”

Jim Reis, VP, technology solutions, Capital Group

COEs address skills and resource challenges

Challenge

Typical comment

Internal skills/talent required for implementation

“Our tech staff are heads down. We can’t get an hour to show them the potential in our business.”

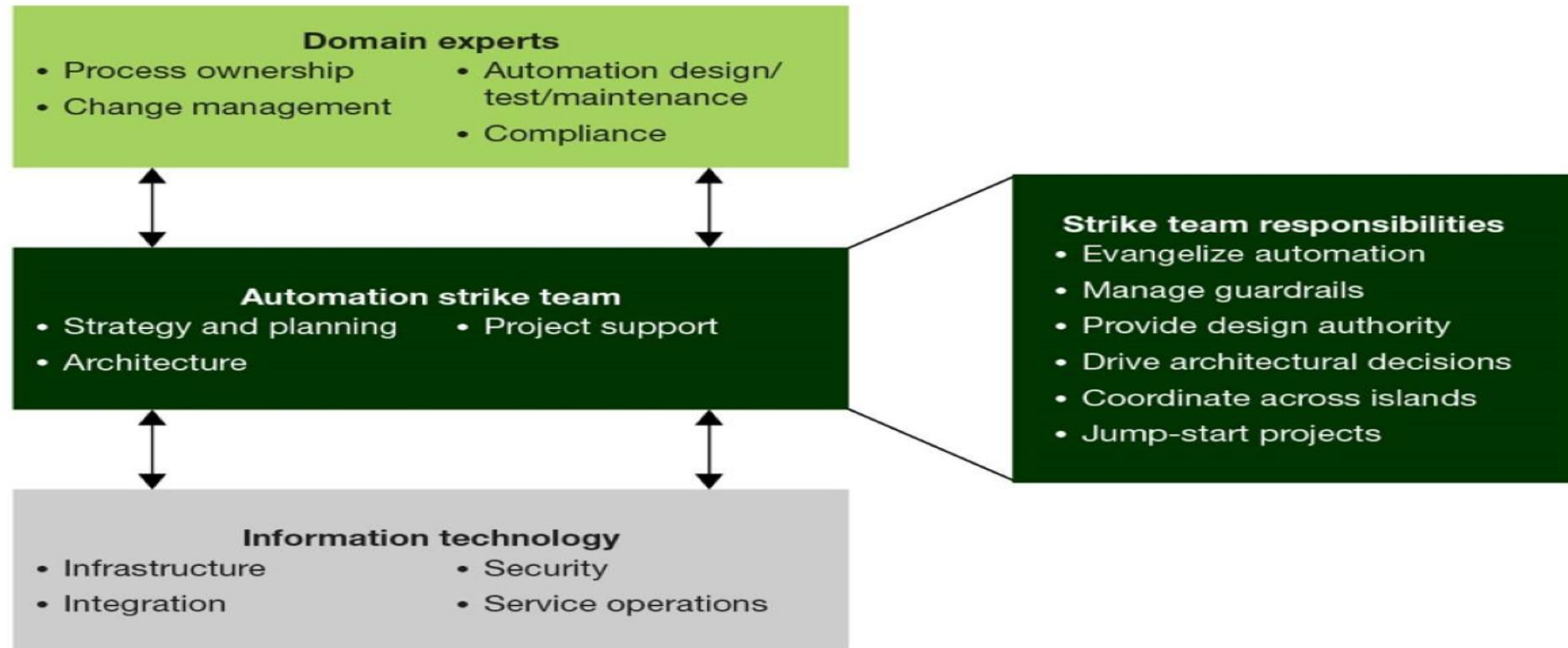
Jacques Denis, cybersecurity tendering engineer, Schneider Electric

Internal resources required for implementation

“Our CEO is telling us all the time, ‘We have to use AI.’ We don’t have many people who even know what AI is, let alone how to program it.”

Michael Suckert, senior key expert AI, Siemens

Automation strike teams can help prevent problems

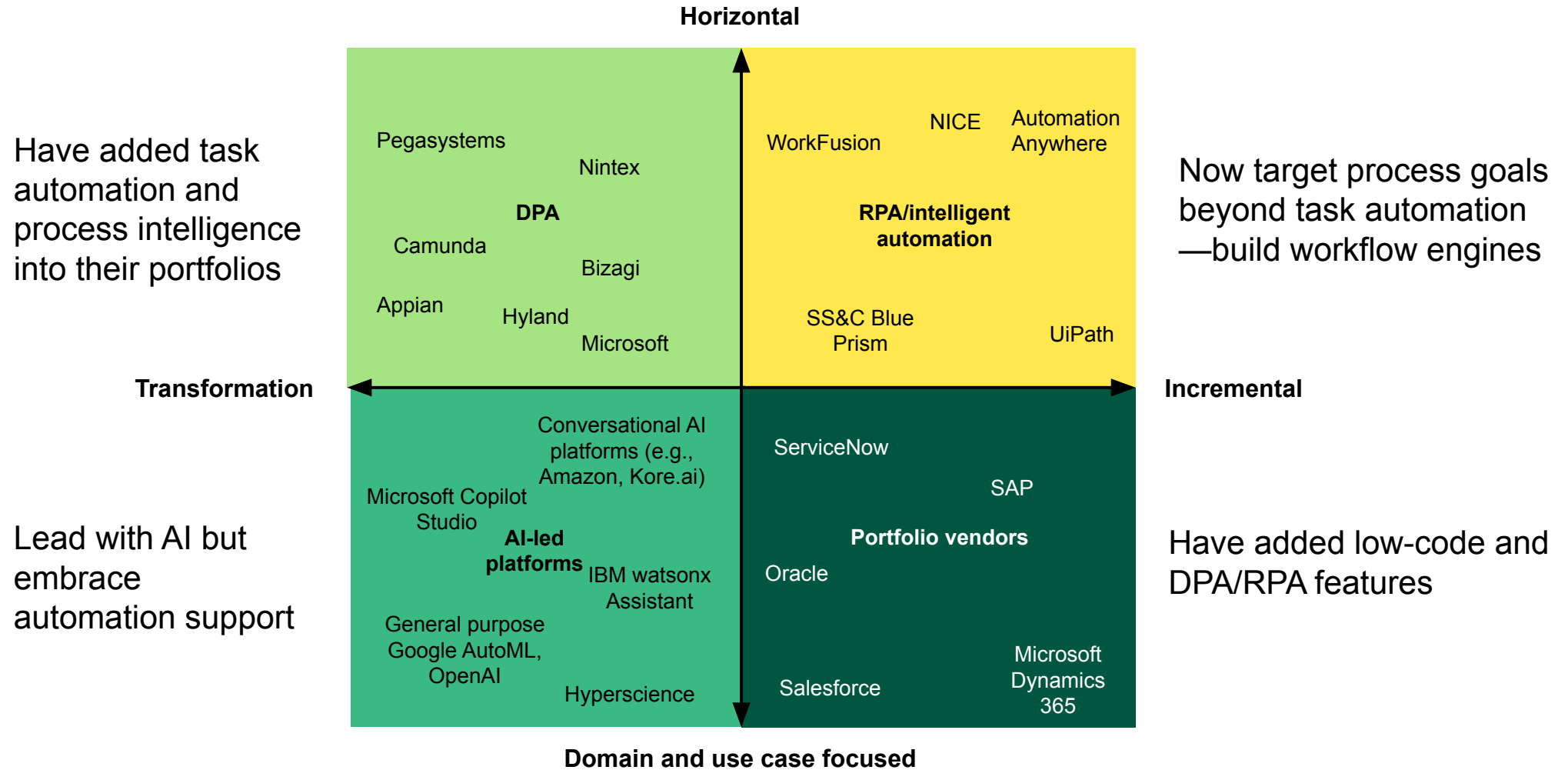


Source: [Architect Your Automation Strike Teams To Accelerate Transformation](#) Forrester report

Develop Your Automation Fabric Architecture

	Layer	Automation Capabilities			
Fabric Orchestration	Interaction	Conversational Intelligence	Behind-the-Screen	On the Screen	AI Agent-to- AI Agent
	Facilitation	Strike Team And Federated Support	Automation COE Governance	Value-stream Orchestration	Process Transformation Toolkit
	Process	Intelligent Automation RPA, DPA	Citizen Development Tools	AI Agent Building Tools	AI-led L3 and L4 Patterns
	Integration	Cognitive and Physical	System	Application	Data
	Data Sources	Data Repositories and LOB apps.	Process Intelligence	Human Expertise	Business Context

Platform confusion reigns



*Providers are representative of the category

THE FORRESTER WAVE™

Digital Process Automation Software

Q4 2023



*A gray bubble or open dot indicates a nonparticipating vendor.

What to do next

- Identify the right use case.
- Select the right technology for process transformation.
- Realize the importance of endpoint orchestration.
- Build a common data foundation that powers AI initiatives.
- Engage your automation COE or strike team.

Thank You.

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Amazon: <https://amzn.to/3S0MXiz>

