

Planning Your Path to Intelligent Process Automation

Getting the digital transformation building blocks right



The digital revolution rests on two pillars: data and process. While data grabs the headlines, and its control and management attracts both investment and attention from investors to consumers and regulators alike, process remains in the background.

Yet process management and process automation are the fundamental building blocks of any enterprise's technology strategy, and they have only grown more important as organizations set about their digital transformation journeys.

Business process management technologies first emerged to help companies try to create services and manage client needs across monolithic enterprise systems. These systems were designed for internal company processes and cost reduction, rather than to meet customer-facing requirements and growing market opportunities.

They were never able to automate all business processes, but they delivered significant efficiency gains and remain vital for all organizations of any scale. As technologies and markets have evolved, however, increasing numbers of business processes have emerged that necessarily exist outside of core ERP, CRM, and other systems. In most enterprises their numbers grow year-on-year, despite constant injunctions for 'ruthless standardization' from the CIO's vendor partners and management consultants.

This growing enterprise complexity has spurred on a demand for Digital Process Automation (DPA) tools that can link complex, siloed systems to deliver business agility and enhance competitiveness. It has also created a demand for 'low-code' tools to pull together relatively simple processes to produce new products and services.

Many enterprises are beginning to trial Robotic Process Automation (RPA) tools as a way of overcoming the problems of complexity. These tools can create scalable, automated process and connect systems in ways that enterprises could not do in the past.

RPA begins by automating simple, repetitive tasks and sending more complex jobs for an expert to handle. As time goes on the machine is trained to

handle increasingly complicated tasks and staff are freed to take on other roles.

RPA is delivering significant business benefits across a wide range of industries because it can automate business tasks across modern applications and fragile, legacy systems. On its own, however, it is essentially a surface level solution, speeding up your existing systems rather than allowing new ones to emerge, so RPA-based efficiency gains might prove hard to sustain.

Laying Artificial Intelligence (AI) on top of your processes and data has the potential to change the equation fundamentally. AI allows organizations not just to automate manual tasks and robotize existing processes, but it enables them to optimize internal systems to deliver new services that drive better customer experience and competitive advantage.

This combination of digital process automation, robotic process automation, and artificial intelligence is what Bizagi, the sponsors of this whitepaper, calls "Intelligent Process Automation".

Moving towards Intelligent Process Automation

Business technology professionals have multiple challenges when they set out to build a digital operations platform that supports continuous business process and product development.

Current enterprise IT is almost invariably a tangled mess of legacy systems and modern applications. Digital transformation projects, with their associated technologies, including APIs and containers, run the risk of increasing that complexity.

The tools to bring order, process, and automation in this environment must be able to handle both complex procedures that require deep access to core systems and be able to go wide—to coordinate more simple tasks that allow nontechnical staff to create applications to meet immediate business needs.

Digital process automation tools that dig deep into enterprise application and data estates must have extremely strong process and case management



capabilities in order to handle multiple variables, including regulatory and security requirements, and support high volume workloads.

Their ability to do this rests on rapidly emerging technologies such as RPA and AI, so those evaluating digital process automation tools must not only evaluate the current AI and RPA capabilities of these tools but also their vendor's future capabilities—whether these are developed in house or through technology partnerships.

Analyst group Forrester, in its *Software For Digital Process Automation For Deep Deployments, Q2 2019* report, notes, “Solutions that have the deepest levels of native support and integration for these new capabilities will be the best positioned to address the most complex processes.”

An equally significant consideration in choosing digital process automation tools is the ability to effectively manage modern application architectures. Traditional process management and automation tools emerged in the pre-cloud era of monolithic applications suites running on premises, usually in bespoke data centers.

That doesn't fit the current picture of enterprise IT. Cloud computing in all its forms may still only account for half of global IT spending, but the trend to move to cloud is inexorable. Cloud-first is the mantra of most progressive IT organizations today and hybrid IT is their default state, with digital enterprises drawing data and applications from a wide range of sources, both inside and outside the corporate firewall.

It is developers, particularly those driving digital innovation, who are pushing this trend furthest and fastest. Whether they are in-house, consultants,

or contractors, they are increasingly focused on microservices and serverless support-based products. This means process automation and management tools must also offer comprehensive low-code and no-code capabilities.

Getting the right tool set—what Gartner categorizes as Intelligent Business Process Management Suites—in place is a key part of moving from running a set of uncoordinated digital projects, to creating an organization-wide digital operations capability, the analyst group says.

Intelligent Business Process Management, says Gartner: “Effectively ... automates, orchestrates, and choreographs business processes that shape themselves as they run. These processes can therefore be considered adaptive and intelligent—executing the best next action instead of the same repeatable sequence of actions. This requires a blend of contextual awareness, effective decision management, responsiveness to events, and advanced analytics.”

Intelligent Business Process Management is a complex process that involves bringing together the basic building blocks of an organization's business processes—the business operating, business decision-making, and performance management systems, together with operational intelligence.

Deploying the right tools to deliver this will provide the digital operations team with real time insights that allow fast, continuous improvement of business processes alongside experiments and testing of new customer experiences and operating models, says Gartner.

This picture of a digital business and the tools it requires, painted by both Forrester and Gartner, is significantly

different to the model of strictly linear business processes that characterize many of the current core business applications in use today.

Why Bizagi?

Bizagi is a leading provider of intelligent process automation software that enables organizations to orchestrate people, applications, devices, information, and robots at scale, and its key products have been highlighted by leading analyst groups.

The company has been named a 'leader' in *Forrester's Software For Digital Process Automation For Deep Deployments, Q2 2019 report*. The analyst looked at the 10 most significant deep digital process automation providers and scored them on 27 criteria, including current offering, market presence, and strategy.

"Bizagi balances deep DPA functionality with a platform designed to go wide," says Forrester. The company "has always focused on low-code development for nonprofessional developers and has always thrived in environments that require a longtail of process-driven applications, with reference customers deploying in excess of a thousand applications.

"While coming from a DPA wide perspective in which low-code and scale are critical," the analyst notes, "Bizagi is continuing to move upstream and become increasingly capable of handling very deep workloads."

Gartner has also highlighted Bizagi's technical capabilities and ease of use, which the analyst believes is a crucial driver in the uptake of low-code tools within an enterprise. Gartner put *Bizagi's Digital Business Platform v.11.2.1 product* in its prestigious 'challenger' category in the *Magic Quadrant for Intelligent Business Process Management Suites* report, published in January 2019. An updated version of the Bizagi platform, offering significant enhancements has been released since the Gartner evaluation.

The analyst report particularly stressed the software's high customer satisfaction rating. "Bizagi approaches the market in a disruptive way, through a deep focus on ease of use and a freemium business model," said

Gartner. Highlighting Bizagi's strengths, the report noted, "Reference customers for Bizagi chose the product for a truly diverse set of reasons—enabling the business to self-serve and optimizing customer interactions were prominent, alongside the usual process optimization.

"Customers also scored it well across all aspects of their experience, resulting in one of the highest average customer satisfaction scores. Compared with other vendors included in this evaluation, customer references scored Bizagi as having one of the easiest to use authoring experiences."

Customer case studies, stretching from financial services to manufacturing, retail, public sector, and health care, emphasize the technology's rapid ROI and its ability to let organizations create a platform for sustained digital innovation.

Since the Forrester and Gartner reports were published, Bizagi has launched an updated version of its Digital Business Platform tool. Version 11.2.2 has new features to enhance collaboration between IT and business unit teams, new mobile and management console technology, and deeper support for robotic process automation and a commitment to support the technology of all the leading RPA vendors.

A strategic choice

CIOs, line of business technology leaders, and application development and delivery professionals face a rapidly changing business and technology environment, and an equally fast-moving vendor landscape for intelligent process automation tools.

Long-established vendors with their roots in business process management technology have traditionally focused on tools for complex use cases, but are now adding low-code tools.

Newer market entrants are meanwhile emerging with a much wider approach, trying to drive up business process optimization in the enterprise through the use of low-code and no-code tools for lower cost and complexity developments.



Tech leaders investing in intelligent process automation tools need to evaluate both approaches to get the right balance of “deep” and “wide” process automation for their organization, says Bizagi CEO Gustavo Gómez, whose description of the platform as the “widest of the deep” is cited approvingly by Forrester in its report.

Organizations engaged in digital transformation projects also have to make strategic decisions about the platforms they use. Do they entrust their business automation developments and deployments to the vendors that provide their ERP, CRM, and other core enterprise applications, in what is potentially a ‘walled garden’ of proprietary software products?

Industry giants such as SAP and Oracle, for example, have spent years building omni-suites of products. Now they are talking about using RPA as a tool to speed integration and allow their customers to create business services across their product suites—perhaps a tacit admission that some omni-suite products are less integrated than their purchasers hoped.

Alternatively, do CIOs and business technology leaders choose suppliers whose primary focus is connecting people, data, and devices, regardless of the applications they use?

For these intelligent process automation vendors, their USP is precisely the ability to integrate with market leading, traditional, and legacy software brands, and a broad spectrum of new, highly innovative AI, Internet of Things (IoT), and RPA tool vendors.

Ed Gower, VP Solutions Consulting at Bizagi, explains the options this way: “We all know enterprise IT systems are heterogeneous and often fractured. We know in every enterprise, customer-facing staff use hundreds

or even thousands of ‘workarounds’, and even manual processes to do their job, because the core enterprise systems, or the way they have been implemented, is not up to the task.

“For all the talk of open systems, containers, and APIs, it remains hard to integrate core enterprise applications and legacy systems to produce modern, agile customer-focused applications and services. That is why intelligent automation products like Bizagi are both ‘deep’ and ‘wide’. We offer our clients the deep tools to integrate, optimize, and automate core business applications and also ‘wide’ capabilities, so that business users can quickly build the applications and tools they need to serve their customers. We provide a platform that links both requirements and gives you the flexibility to respond to a constantly changing business and technology environment.”

The options are clear. Do you want your access to key digital transformation technologies to be brokered and mediated by the industry giants that brought you important, but too often siloed, monolithic business systems?

Alternatively, do you want your intelligent process automation technology supplier to offer multi-vendor support for core systems integration and process automation, and also enhance your access to the latest transformational technologies, while delivering rapid ROI? The choice is yours.

Case Studies

Case study 1 Old Mutual

Old Mutual is a FTSE 100 company with over 16 million customers. It provides international investment, savings, insurance and banking services, and is the largest insurer in South Africa. The company chose Bizagi as a key technology partner for a customer-centric business transformation program.

The initial aim was to reduce customer waiting times across its branch network and enable sales advisors to more effectively recommend relevant products or services.

A major process streamlining and automating operations more than met these goals. Branch service improved dramatically, with queue times reduced ninefold, while staff were able to improve point of contact resolution by more than 30 percent thanks to employees having access to the appropriate information when they needed it. Customer onboarding times were also reduced by a factor of ten.

As a result, the bank's Net Promoter Score, a marketing measure of how likely customers are to recommend a product or company, went up 15 percent for a range of services, from funds withdrawals and loan applications, to reporting identity theft or initiating claims. The core objectives of the transformation program were to accelerate delivery of a '360 customer view' across all channels for branch staff and empower sales advisors to provide a consistent service and advice on the spot. There was a requirement to leverage customer insight and data analytics to improve customer retention and boost revenue from cross-sell and leads.

This was achieved by simplifying technology and processes into a common service layer, and by using agile development methodologies to drive continuous improvement and reduce resistance to further change.

Bizagi technology underpinned a significant improvement in customer service and satisfaction ratings and helped reduce the number of escalations to the back-office related to incorrect customer data.

It also allowed the redeployment of experienced front-desk advisors elsewhere as customer service advisors made use of integrated systems to support intelligent decision-making.

Old Mutual currently runs 70 million Bizagi process activities a month.

Case study 2 US Government Agency

A US state agency has used Bizagi to digitize its business processes and dramatically improve its service to more than 20,000 employers and their staff.

The state's Workers' Compensation group has transformed its claims process that is used by 23,000 organizations, from an 80-year old paper-based system to a new digital process that streamlined business activities, condensed four paper forms into one digital process, and saved days of administration work for scheduling claims hearings.

The new automated scheduling of hearings can do in minutes what previously took six people eight weeks.

The agency was anxious to create an interface between its legacy mainframes and its web applications, and Bizagi's process automation platform enabled it to achieve this without hard code changes.

It has been able to streamline and digitize its business processes, save time and money on postal costs, respond more quickly to regulatory change, carry out data analysis, and track trends, which it was unable to do before.

Most significantly, this technology-driven transformation allowed the agency to meet its goals of helping injured people receive prompt settlements and get back to work.