Everest Group® RESEARCH

Defining Enterprise RPA

Deconstructing Market Demand for an Enterprise Robotic Process Automation (RPA) Solution; Security, Scalability, and Software Richness are the Indispensable Features

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Executive summary

Robotic Process Automation (RPA) has quickly risen to the top of mind of senior executives in almost all businesses ecosystem. It is not all hype - many enterprises have successfully developed use-cases and deployed & leveraged RPA for efficiency and other objectives. Most deployments are initiated by business units wishing to automate transactional and rules-based processes that can be entirely delegated to bots in unattended mode. However, for certain complex and security-sensitive processes, bots might need to be deployed in attended mode.

These successful deployments, and their subsequent benefits, encouraged enterprises to scale their RPA initiatives up and out, but doing so is not without its challenges.

The situation raises multiple questions for enterprises:

- Do vendors have solutions that can be deployed in a scalable manner?
- How much involvement from IT would be required or can business users implement such initiatives without significant IT involvement?
- Are the solutions secure?
- Could enterprise's governance structure and regulatory requirements be embedded in the robots?
- Is it possible to keep existing legacy systems and applications untouched when deploying an enterprise-wide RPA?
- Are the requisite RPA skills available, either internally or externally?

As RPA is deployed across industries to automate many different types of processes, RPA solution developers and providers need to better understand what their customers value most and why. Initial research and conversations on automation solutions led to the development of a class of solutions often referred to as enterprise RPA. While an understanding of enterprise RPA has formed on the supply side of the market, with software vendors adding features to their solutions, less is known about what enterprises value. This paper provides the findings of a survey-based research project that Everest Group undertook to understand what enterprises value as the most important features of RPA software. The paper includes:

- Overview of the methodology and the research
- Introduction and the business case for enterprise-oriented RPA and how businesses define it
- Five groups of features of RPA software that formed the dimensions that Everest Group used to check enterprises preferences and their relative overall significance
- Beyond the technological dimensions, the factors that contribute to making an RPA solution enterprise-fit

RPA technology providers can leverage this report to understand what features of RPA solutions enterprises value most. Similarly, enterprises can use this report to discern how their peers have rated the various features, what functionality to look for when choosing an RPA solution, and how these solutions could help address business needs.

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The research methodology

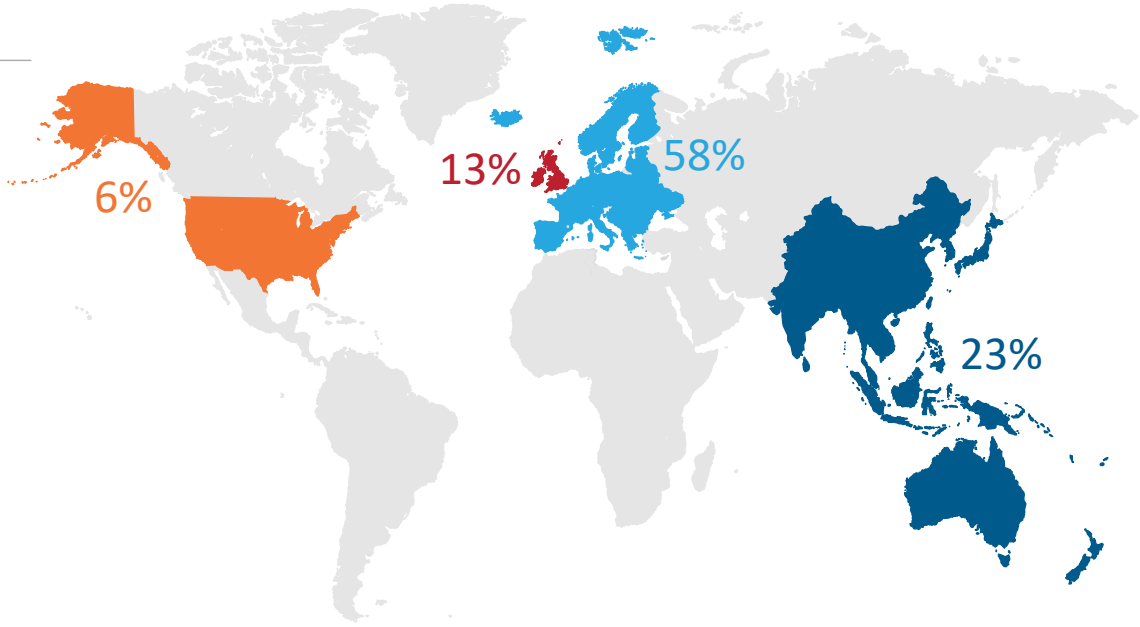
Everest group surveyed 72 executives from enterprises, 98% of which had already invested in RPA, many in multiple geographies, and ranging across organizational sizes. Exhibit 1 shows the distribution of participants across geographies and the maturity of their RPA implementations. It is important to note that the respondents' collective profile does not represent the global landscape of RPA buyers, but is only evident of the sample considered for this study. The intent of the research was to understand the definition of a best-fit RPA solution from enterprises' practitioners' perspective. The qualitative and quantitative insights constructed from the study were further combined with in-depth interviews with a number of the participating organizations, as well as Everest Group's ongoing research and IP on RPA.

EXHIBIT 1

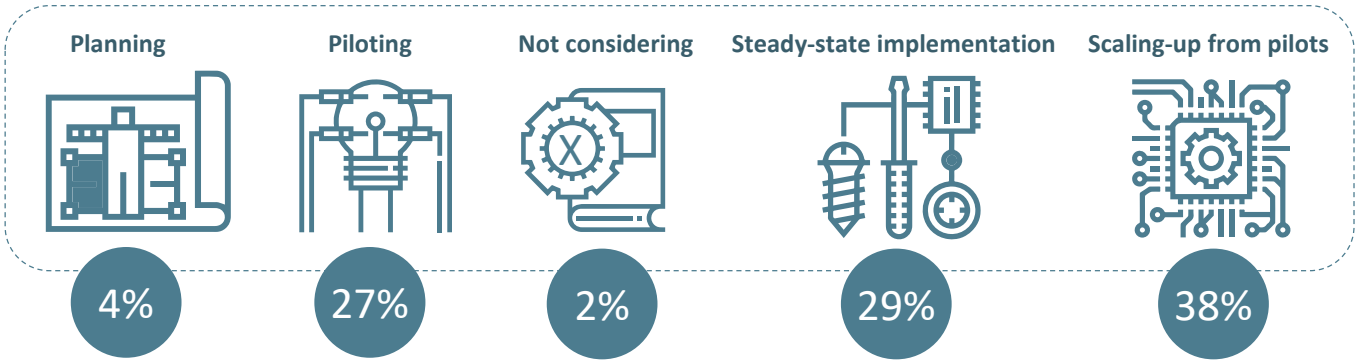
Distribution of profiles of respondents

Source: Everest Group (2018)

Geographical distribution



Maturity of RPA initiatives



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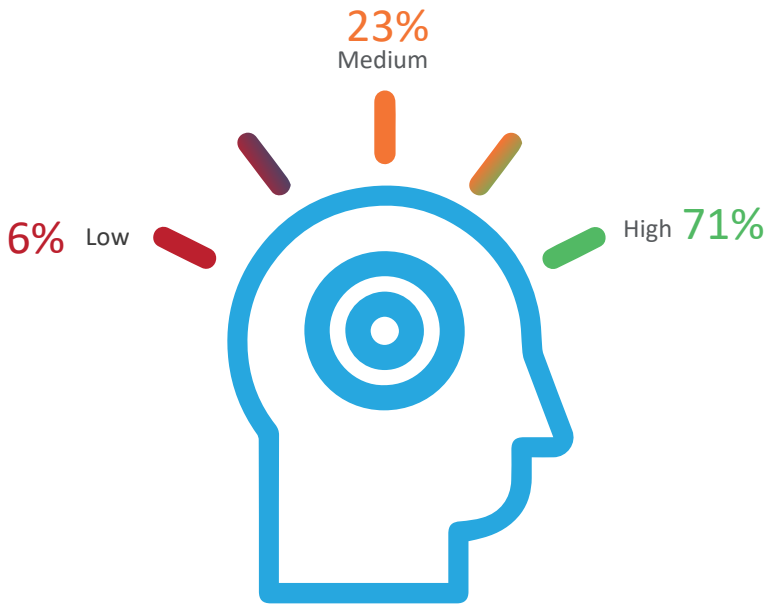
There is growing awareness among enterprises about RPA, as the technology continues to permeate many industries and business processes. Exhibit 2 shows how the study participants rated their level of RPA awareness. Combined with the fact that upwards of 60% of respondents had gone past the piloting phase, Everest Group was able to derive valuable insights from this exercise.

Exhibit 3 highlights the added benefits enterprises can reap by adopting an enterprise RPA solution.

EXHIBIT 2

Awareness levels of executives surveyed

Source: Everest Group (2018)



Introduction and business case of an enterprise-oriented RPA solution

The spectrum of RPA solutions

Enterprises can select different types of RPA solutions depending on their specific requirements and strategies. The categories of solutions are:

- *Assisted RPA (RPA 1.0)* – Deployed on a worker's desktop, the major objective of this class of solutions is improving individual worker productivity. These solutions are easily deployable and cost effective. However, they have their own security, flexibility, and scalability limitations
- *Unassisted RPA (RPA 2.0)* – Robots are deployed on a centralized server from which they can be controlled manually. These solutions can be leveraged to automate end-to-end tasks and workflow scheduling/queuing is possible from the central control console. Potential limitations include scalability challenges; for example in extremely large deployments, the central server's physical capacity could come under strain in terms of automation execution and other factors such as the sheer quantity of log files that robots generate. The burden of manual management of thousands of robots could become challenging for organizations. Robot scheduling and queuing features and developments in RPA for multi-tenancy will further elevate scalability possibilities

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- *Autonomous RPA (RPA 3.0)* – A progression from unassisted RPA solutions, Autonomous RPA can handle more complicated rules-based processes with some built-in decision making in the live environment such as handling changed priorities for a more dynamic style of workload balancing. Such solutions would be best utilized when enterprises have the option of deployment on the cloud
- *Cognitive RPA (RPA 4.0)* – With the majority of features carried on from Autonomous RPA, Cognitive RPA is further capable of integrating with AI technologies including, but not limited to, machine learning and natural language processing. AI would enable it not only to handle the unstructured data of a process, but also to enhance RPA's own capabilities, for example using computer vision to improve finding objects on a screen

Ease and speed of implementation and scaling

The types of benefits that organizations could derive from enterprise-grade RPA solutions include:

- *Greater ease and speed of implementation*: Enterprise RPA software should provide ease of robot creation that consequently speeds implementation. Ease of development/coding could be through pre-built libraries of automations that can be customized for specific industry use-cases and integrated with existing applications and user interfaces. In addition, drag-and-drop development features allow tech savvy operations personnel to develop robots and ease the workload on the technology workforce. Technical people can, in turn, provide support for more complex requirements and run-time infrastructure optimization
- *Attaining faster scalability from initial pilot to live environments*: RPA software supporting virtual machine deployments and multi-tenancy deliver significant scalability advantages in terms of the computing infrastructure. Elasticity on the cloud provides scalability and capabilities to handle demand fluctuations as well
- *Implementation across geographies*: The ability to scale up and out would enable organizations to take automation to parts of their organizations that are located in other geographies, for example finance and accounting or other back-office administrative functions in other countries. Solutions could also provide built-in capabilities for different currencies, calendars, and other more geography-specific business aspects
- *Ease of implementation across business units*: Enterprise RPA solutions should offer extensive libraries of reusable components that are either already provided or created by users. Consequently, businesses can conveniently and quickly automate similar processes across different business units, for example banking processes in retail and commercial segments that have similar and yet different requirements such as Know Your Customer (KYC)
- *Increasing process automation rates*: Higher rates of automation could be achieved if the RPA solution offers features for process orchestration and/or integration with workflow solutions to enable automation of more complex and aggregate processes. Capabilities to handle automation exceptions more efficiently with some degree of context awareness or prescriptive robot action could boost Straight-Through Processing (STP) as well
- *Reducing error rates and exceptions*: Ease of monitoring and robust logging of robot activity helps enterprises learn and fix the causes of exceptions through process mining. Also, the addition of machine learning capabilities could, in time, reduce such exceptions as the robots learn and adapt the process steps for improved business outcomes

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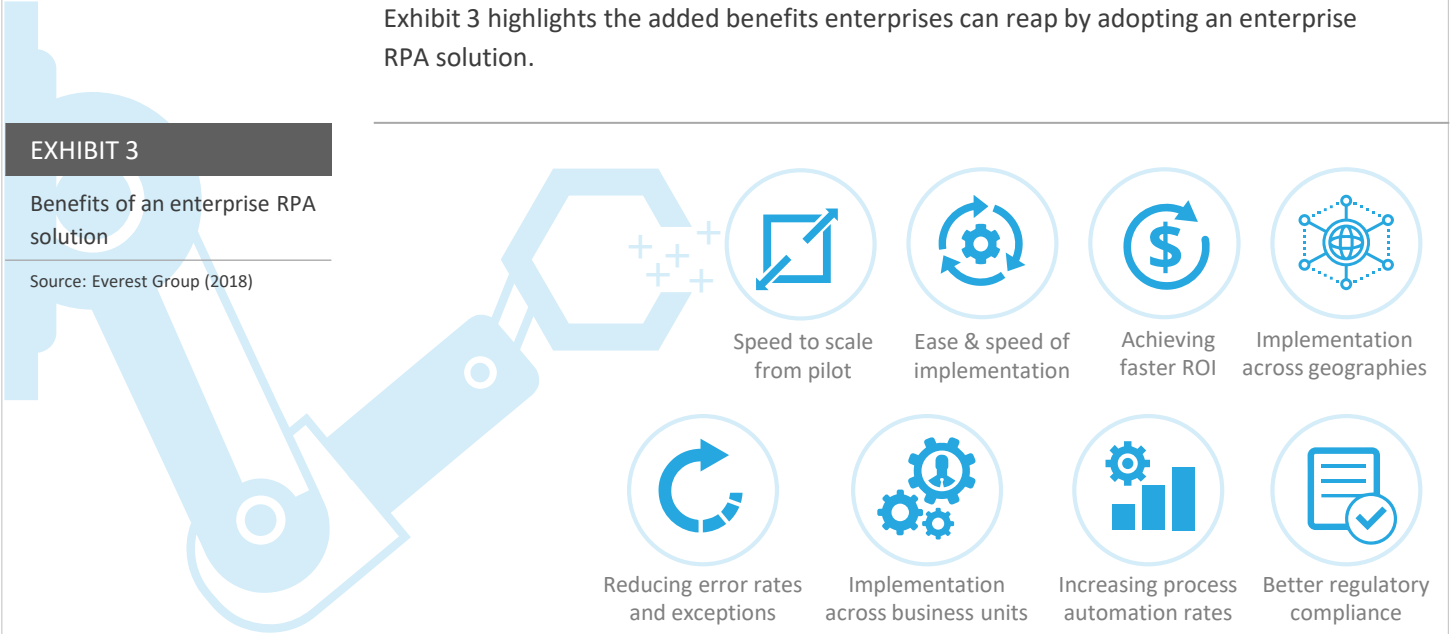
- *Ensuring regulatory compliance*: Robots can be programmed to apply regulatory requirements in every transaction as well as to create a full record of their activities, increasing ease of reporting and auditing
- *Achieving faster ROI*: Enterprise RPA solutions are faster to implement with less time and resource investment required than other automation initiatives, such as workflow and system and applications integration, thereby expediting ROI

Exhibit 3 highlights the added benefits enterprises can reap by adopting an enterprise RPA solution.

EXHIBIT 3

Benefits of an enterprise RPA solution

Source: Everest Group (2018)



Solution characteristics of enterprise RPA – what matters?

The top-rated features

We grouped key enterprise RPA features into five dimensions and asked study participants to rank their importance:

- Software quality and robot maintenance features
- Security and risk management
- Ease of deployment and scalability
- Ease of coding and robot development
- Complementary features

The three dimensions that received the highest rating for importance were software quality and robot maintenance features, security and risk management, and ease of deployment and scalability.

Exhibit 4 provides the details of how participants rated these characteristics. Full details of each, are provided in the next section.

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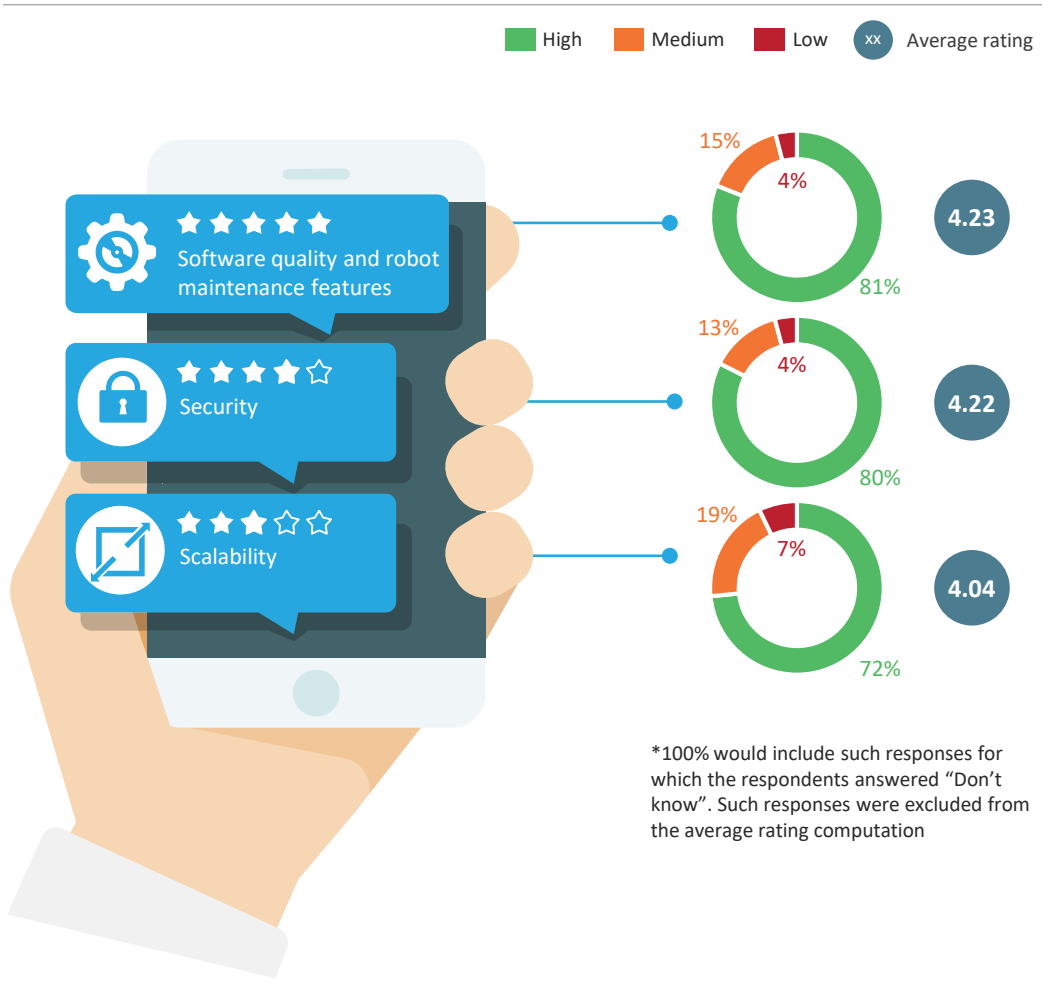
EXHIBIT 4

The most important dimensions (percentage of respondents)

Source: Everest Group (2018)



*100% would include such responses for which the respondents answered "Don't know". Such responses were excluded from the average rating computation

The five key technological dimensions of enterprise RPA

Software quality and robot maintenance features

Combining the reliability and accuracy of robots with the robustness of the development and software maintenance features, this dimension captures development, bug fixing, version management, backward compatibility, and general maintenance aspects of the software and its upgrades. The solution characteristics covered in this dimension are:

- *Bug-free with seamlessly integrated components:* All too often, typically due to acquisition or embedding of third-party software, vendors offer RPA with components that are not fully integrated, resulting in duplicated coding effort and clunky interfaces between those components, such as not being able to edit the decision logic for automation that was created using a recording facility
- *Reliability and accuracy of identifying objects from the user interface:* Because the enterprise RPA largely runs unattended, it is imperative that the software components used to design an automation and pick up objects on the screen of a business system work reliably and accurately, such as in the case of underlying screen resolution/color changes. This ensures that enterprises spend less time maintaining the robots and handling exceptions when the robots fail
- *Session and error logs for debugging:* The RPA software should generate session and error log files for debugging and audit purposes

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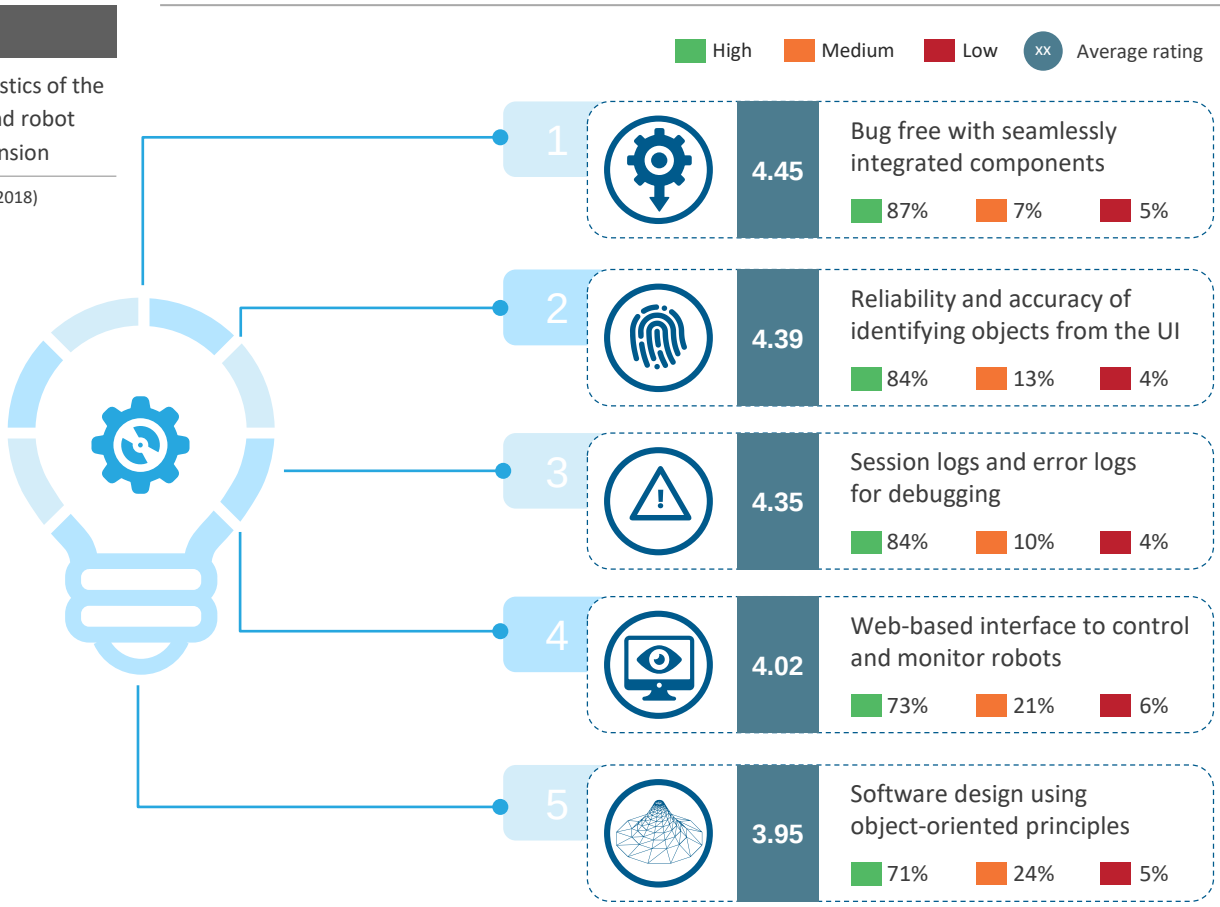
- *Web-based interface to control and monitor robots*: As enterprise RPA solutions are mostly deployed on a server or cloud, remotely controlling or monitoring the robots from a web-based interface is essential
- *Software design based on object-oriented principles*: This type of approach makes it easier to reuse and maintain robot code. It encapsulates the method or functionality of a robot module within interfaces that isolate the module from underlying changes. The alternative approach of reusable robot parts speeds development

The relative importance of solution characteristics constituting the software quality and robot maintenance dimension:

EXHIBIT 5

Solution characteristics of the software quality and robot maintenance dimension

Source: Everest Group (2018)



Security and risk management

When processes are handed over to a robot, security concerns naturally arise, such as hacking of robots and unauthorized access. This dimension covers features that make the automation solution more secure:

- *Robust logging of robot activity and audit trails*: For security and regulatory compliance, enterprises must maintain an audit trail of changes made to robots, who made those changes, and when; these audit trails are used to identify operational errors and to subvert fraud attempts
- *Adherence to security standards*: Having a robust cybersecurity infrastructure and framework in place is not only a priority for enterprises but for the regulatory authorities as well. Because RPA delegates data and process handling to software, RPA resilience

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against cybersecurity threats is a must. Checks against intrusion vulnerabilities in RPA, the third-party software that it interfaces with, as well as network security, are all important considerations

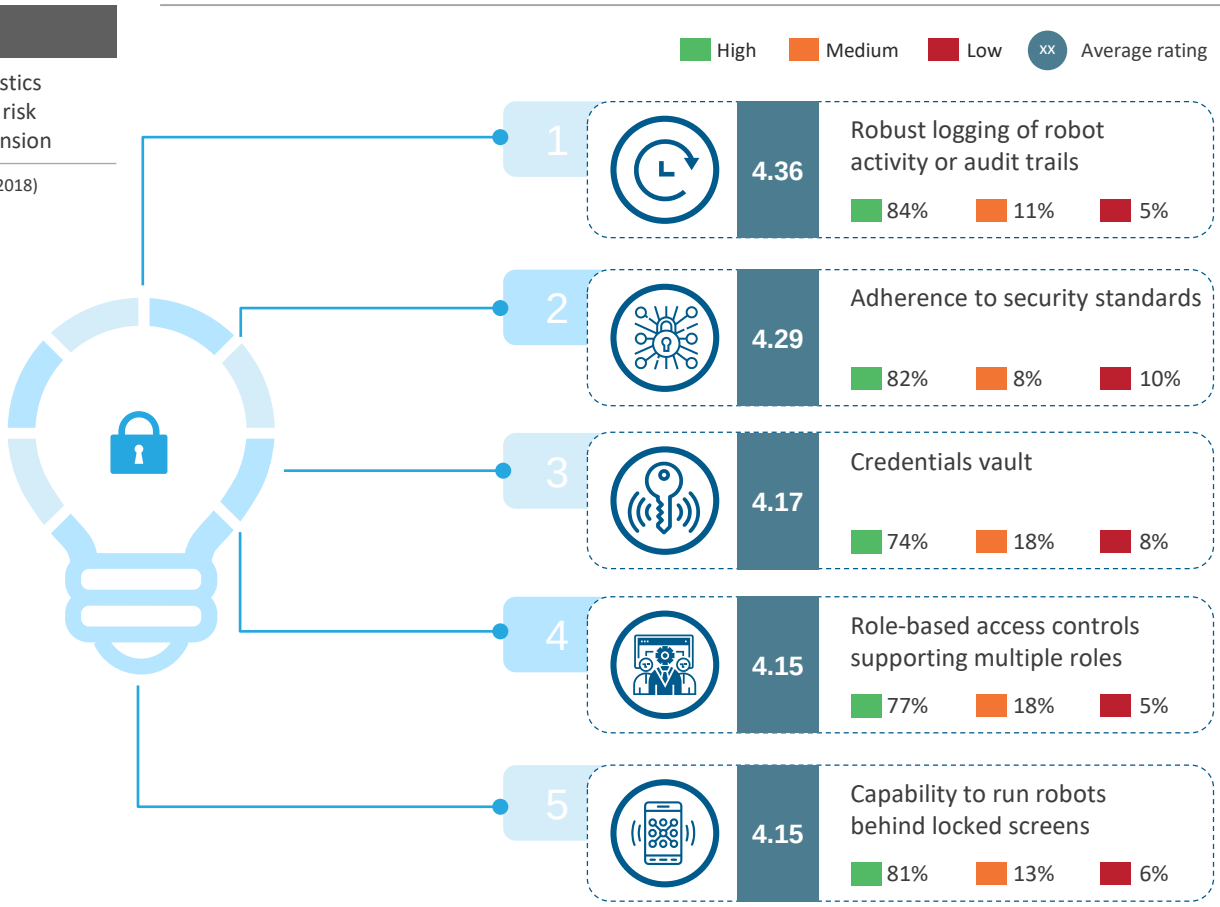
- *Credentials vault*: In conversations with enterprises, the vault was found to be a critical feature that ensures the comprehensiveness of security measures for RPA solutions. Security is enhanced by better credentials management with a credentials vault for robot logging-in details. Support for enterprise password policies such as complexity of passwords matters as well
- *Role-based access controls supporting multiple roles*: In an enterprise RPA solution, it is necessary that an administrator defines the various users' roles and their rights of operations. For example, it should be properly delineated who can design/re-design and who can run the robots, with possible overlapping areas between these rights
- *Capability to run robots behind locked screens*: The robots should have the capability to comply with enterprise and industry security standards and ensure data privacy by running the automated processes behind locked screens

The relative importance of solution characteristics constituting the security and risk management dimension:

EXHIBIT 6

Solution characteristics of the security and risk management dimension

Source: Everest Group (2018)



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Ease of deployment and scalability

This dimension encompasses some of the biggest challenges organizations face when implementing and scaling up process automation. It addresses robot management features, deployment in attended and unattended modes, and the ease of scalability in dynamic settings, for example according to process load and demand fluctuations. The solution characteristics covered in this dimension are:

- *Scheduling, queuing, and other robot management features:* The software should offer good robot controls and management capabilities including straightforward scheduling, and queuing as well as conditional execution of robots based on predefined scenarios or event-driven triggers. An assigned administrator should also be able to access the corresponding workflow dashboards and track robots' statuses and activity to easily identify where exceptions have occurred and what the causes were
- *Secure caching/copying of operational information for robot recovery or exception handling*: Ease of recovery is important for enterprises that are looking to scale up their deployments, as a process failure can mean regulatory failure or even loss of business in extreme cases. Enterprises can opt to start an abandoned process from the beginning and later analyze the cached process data to figure out the cause of the exception
- *A central application server that can run unattended*: A central server that can execute, provide information, and undertake recovery functions for robots is a must-have for many enterprises
- *Features that help with scaling up*: The RPA solution should be designed with scalability in mind. This scalability could come in the form of a centralized application server that can be duplicated for scaling up as well as features such as re-usability of robot parts, autonomous execution, and process orchestration to join parts of complex processes
- *Option to run on virtual machines or in the cloud*: These provide options for making the most of an enterprise' IT infrastructure and optimize the speed of automations and robot performance
- *Ability to be deployed in both attended and unattended modes*: Not all business processes are fit for fully automated handling, or unattended automation. Some more complex or security-sensitive processes require that a robot work in collaboration with a manual workforce in attended mode. While some transactional processes can be fully executed by the robots in the background so that the manual workforce can be freed up to do value-add tasks, most enterprises would require a combination of the two
- *Ability to auto-scale depending on process load*: Volumes of transactions can fluctuate significantly. The ability of the software to identify high demand from some processes and auto-scale or assign more robots to the process that is experiencing high demand
- *Ability to execute multiple automations in parallel:* Not all business processes are linear and sequential. Rather, in most business processes, the workforce operates on multiple systems in parallel. In order to match this capability, the RPA solution must allow robots automating different processes to run in parallel
- *Open architecture of the platform*: An open architecture allows enterprises to build customized components over the RPA platform and also integrate it with third-party technologies
- *Support for REST or SOAP web services*: An additional feature in RPA solutions allows organizations to automate processes or part of a process that extracts data from a web

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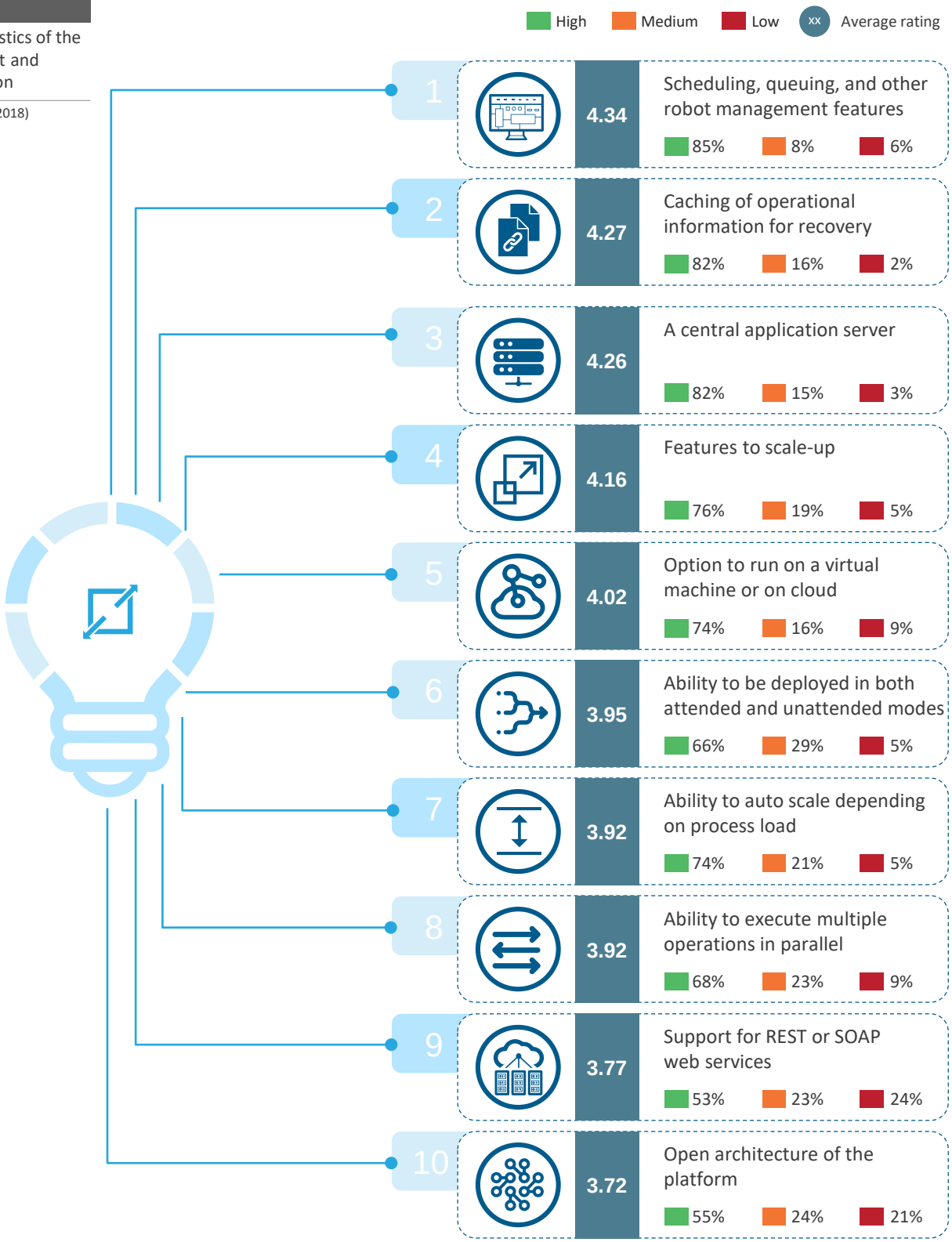
service. As SOAP and REST web services are the most widely used, an RPA solution that could provide inbound as well as outbound integration with these web services would be a desired add-on for enterprises

The relative importance of solution characteristics constituting ease of the deployment and scalability dimension:

EXHIBIT 7

Solution characteristics of the ease of deployment and scalability dimension

Source: Everest Group (2018)



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Ease of coding and robot development

This dimension describes how easy it is to learn about the software and create the robots. Training material and documentation should also be easy to access, grasp, and follow:

- *Non-invasiveness*: RPA solutions integrate with the UI layer of a computer-centric business process just as a manual workforce would. This is important to enterprises that have experienced long, drawn-out system integration problems in the past. It is particularly important to BPO service providers looking to automate their processes, as they are usually not allowed to update the underlying IT systems of clients
- *Availability of pre-built integrations with leading software applications*: While automating certain business processes, it may be necessary for the RPA software to access/integrate multiple enterprise applications, such as SAP, Oracle, etc. In such a scenario, a solution with pre-built integrations would be faster, easier, and more efficient to deploy
- *Ability to create manual steps with robot tasks*: Automating various business processes might require co-work between the digital and manual workforces. Considering this, RPA solutions should give developers the capability to delineate between robot and manual tasks when creating a workflow diagram on the RPA platform
- *Extensive libraries of re-usable automation components*: Access to, or the ability to, create libraries of re-usable workflows, methods, or components would help speed automation across different processes
- *Version control and management*: Version control and management is an important aspect of robot development and maintenance. It should be easy for users to update and manage versions of robot code and track what changes have been made
- *Ease of robot coding*: We are in the era of zero or no code development. RPA solutions should reflect this, particularly given that the non-technical operations personnel have been known to code robots or work in close collaboration with developers. Robot coding should be convenient with user-friendly components, such as the availability of drag-and-drop components while designing processes
- *Features for collaboration when designing robots*: Such features include a workspace that allows known problems or issues to be shared and easily found by different members of the development team or the ability to upload and share specifications and agreed design principles for a robot
- *Robot creation using a built-in recording function*: A built-in recording function is useful if the process being automated is simple and transactional. It also acts as an easy way for organizations to get started. Beyond these requirements, the recording feature will most likely lose its value, as organizations get better at using the RPA solutions of their choice

The relative importance of solution characteristics constituting the ease of coding and robot development:

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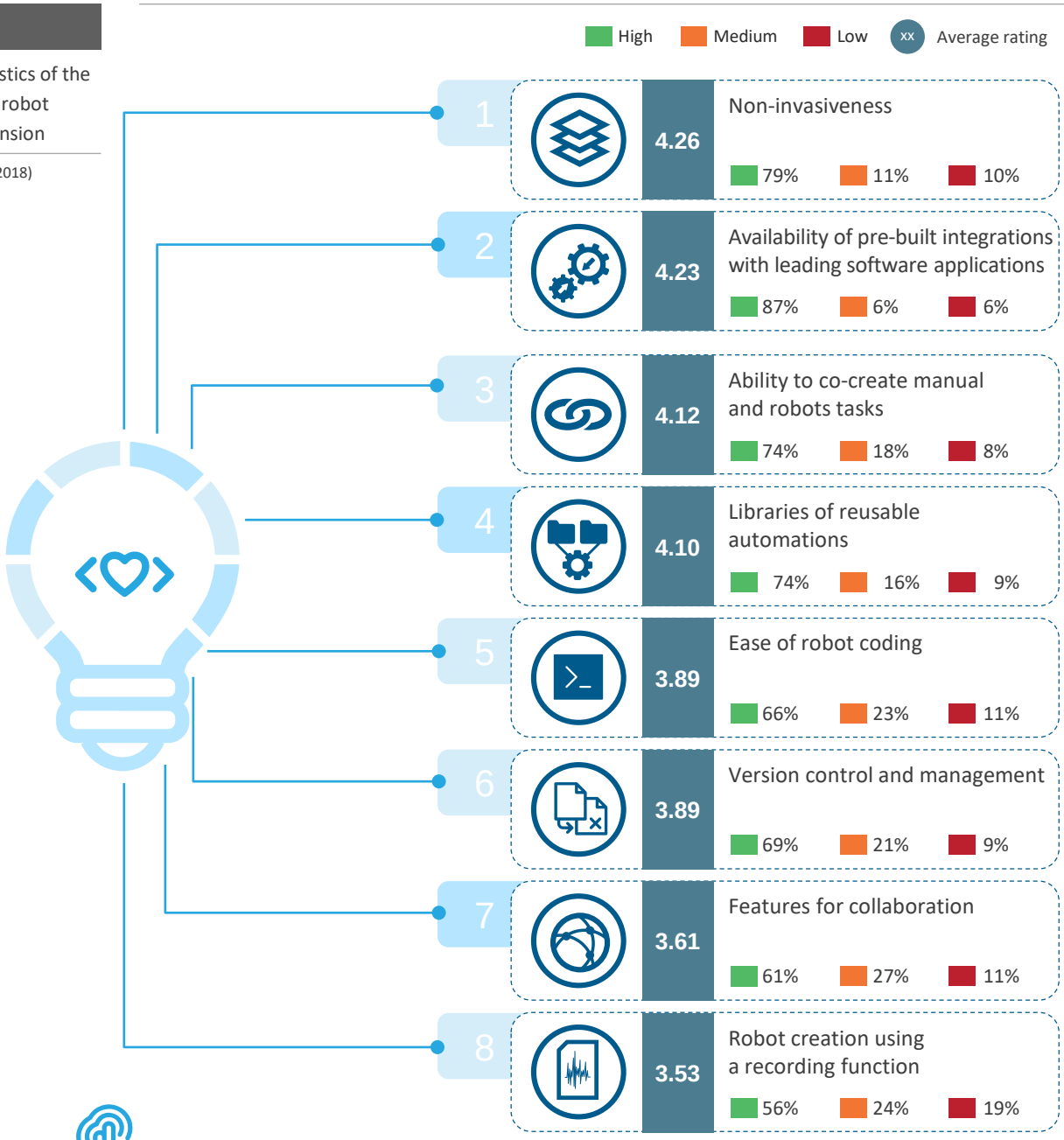
EXHIBIT 8

Solution characteristics of the ease of coding and robot development dimension

Source: Everest Group (2018)



Complementary features

This dimension is more forward-looking, where automation provides enterprises with a platform to extract greater value from their RPA solutions by combining it with complementary technologies such as analytics and cognitive / AI:

- *Integrated cognitive and machine learning capabilities*: Enterprises often have to work with unstructured data, such as incoming emails and documents from customers. Robots that are capable of working with smart technology to read such content and learn what is required would lead to faster STP with augmented automation
- *Integrated workflow or end-to-end process orchestrator*: These systems help not only to manage robots and their operations but to combine parts of complex processes as well, and to create control points for people to step into the loop of automation. These types of features allow complex processes to be automated. Without them, automation would only happen at lower process levels such as tasks, where the value generated from automation, would be minimal

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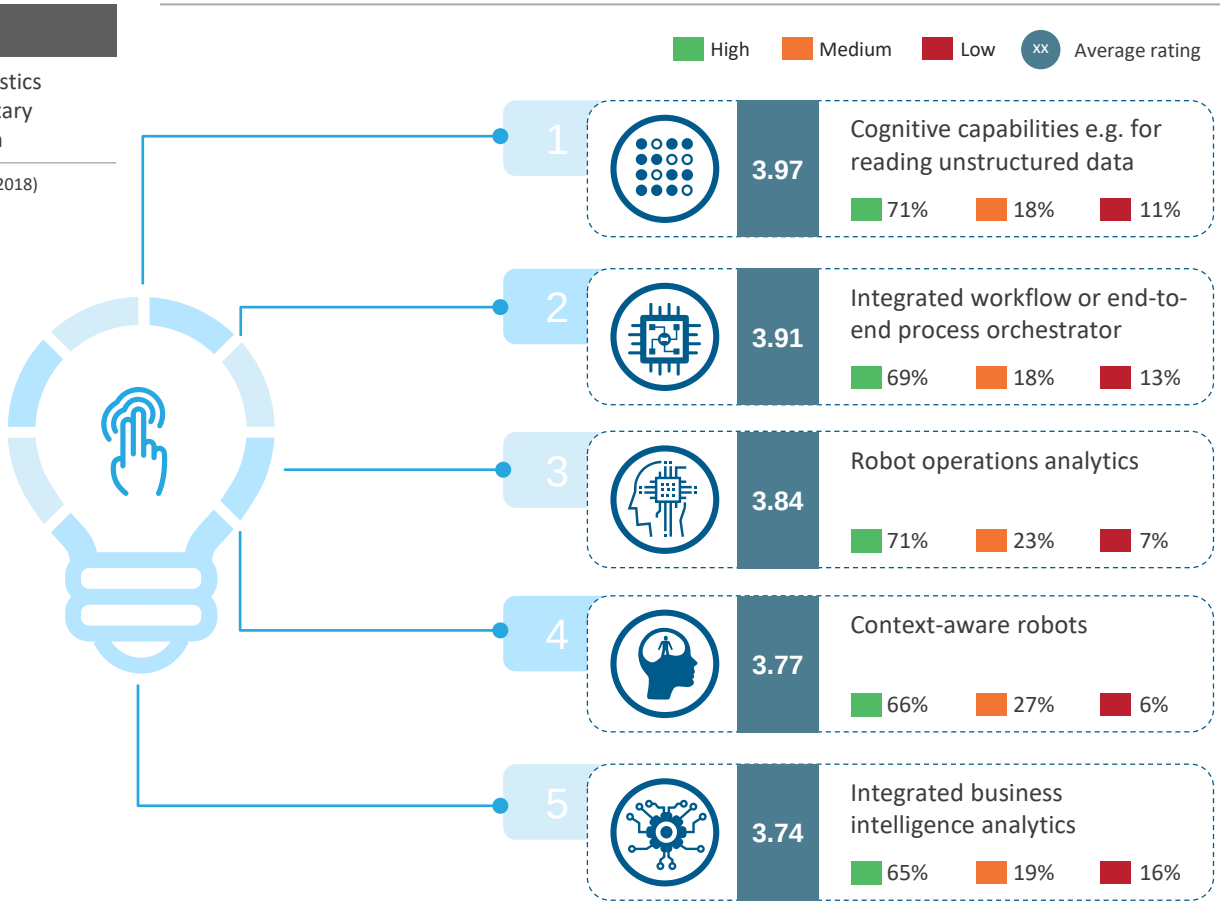
- *Robot operations analytics:* A layer of analytics over the continuous operational logs that the robots generate could provide enterprises with the ability to further streamline their business processes. It could also be used for smoother running of automated processes by analyzing which processes caused exceptions or which processes required human intervention
- *Context-aware robots:* Robots can be given parameters to make them more aware of the context within which they run, for example how long to delay a login attempt to a system if the system is not responding
- *Integrated analytics for business intelligence:* It is clear from our research that study participants, working in operations, are focusing more on operational analytics than the bigger picture of business intelligence and customer analytics. Unsurprisingly, the former leads to direct and more immediate cost savings in operations. We believe that in many industries, particularly customer-facing and competitive industries such as retail and banking, profitability can also be driven by utilizing RPA-generated data for customer/business intelligence to drive outcomes such as increasing retention through historic purchasing data analytics

Exhibit 9 represents the relative importance of solution characteristics constituting the complementary features dimension

EXHIBIT 9

Solution characteristics of the complementary features dimension

Source: Everest Group (2018)



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Observed variations in study data

While we have discussed the overall relative importance of the five dimensions, we observed other nuances in the responses that arose from specific concerns of enterprises at different stages of RPA adoption maturity.

Variations by enterprise scale

Large enterprises are most upbeat about the merits of enterprise RPA overall. Unsurprisingly, they stand to achieve the highest cost-efficiency, and consequently, profitability by automating their operations. Surprisingly, they are followed by small enterprises because they have greater flexibility for innovation, and they see enterprise RPA as a competitive advantage, as well as an operational foundation from which they can scale up with minimum costs

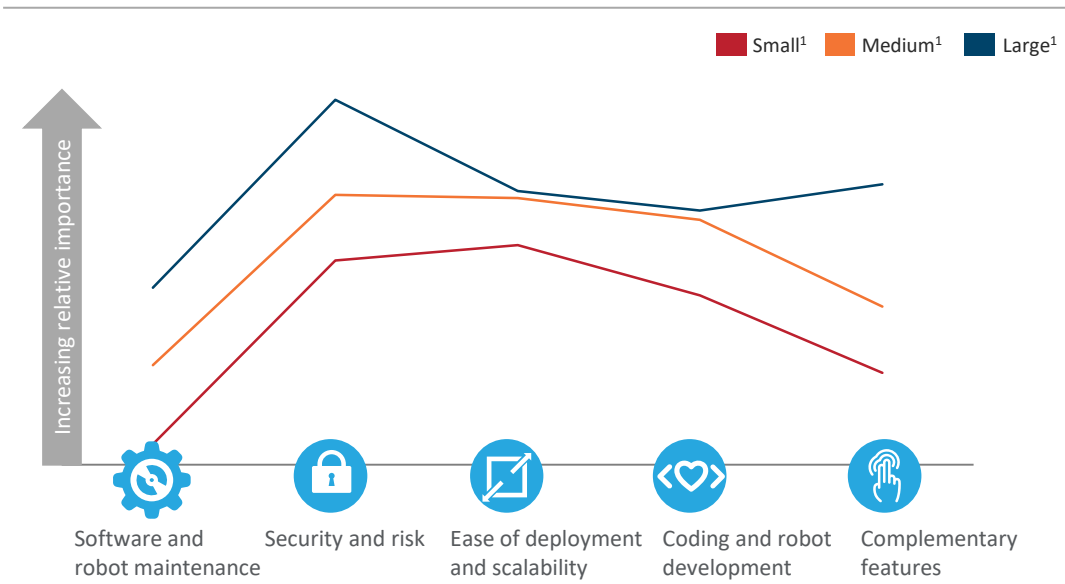
- For large organizations, security and risk mitigation are more important than other dimensions, which is indicative of the higher risk they assume when integrating automation into their operations, due to their large scale of operations and numerous databases. Also, as these enterprises have larger IT budgets than their smaller counterparts, they are more willing to invest in next-generation automation capabilities that are based on AI/cognitive technologies
- Contrary to expectations, small organizations also rated security and risk mitigation features as the most important driver for adopting a specific enterprise RPA solution. In their case, this is because of their limited resources and lack of easy access to specialist IT security skills. The solution that they choose has to assure them of built-in security features

Exhibit 10 presents the relative importance of the five dimensions by the scale of the responding enterprises:

EXHIBIT 10

Drivers of RPA adoption by enterprise scale

Source: Everest Group (2018)



1. Small: participants with revenue less than US$ 100 million and between US$100 - 500 million; Medium: participants with revenue US$ 500 million - 1 billion; Large: participants with revenue greater than US$1 billion

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Variations by stage of RPA implementation

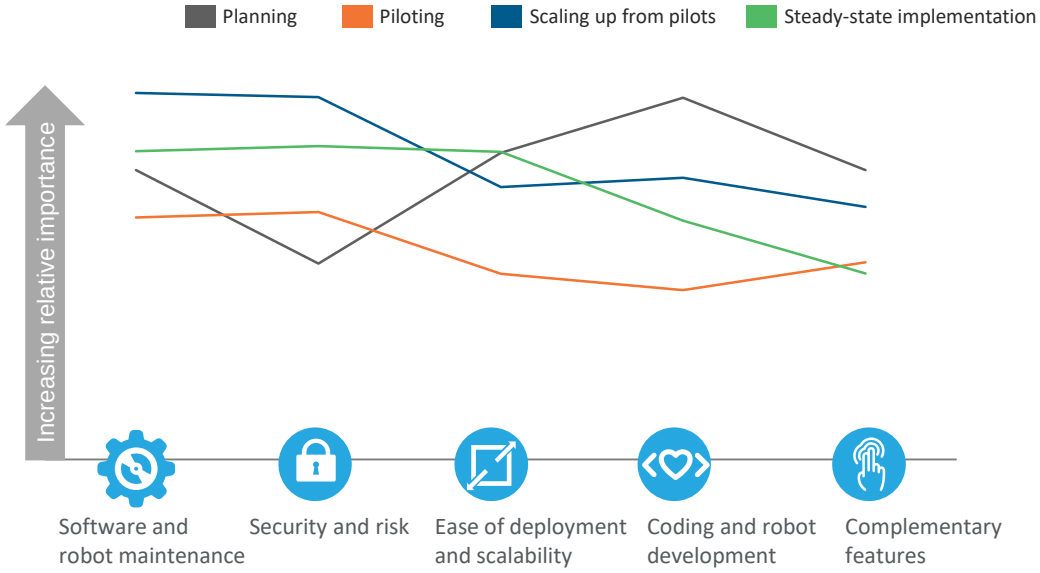
- Those enterprises that are planning to jump on the RPA bandwagon rank ease of coding and robot development features highest. This ranking is indicative of enterprises' desire to get started with RPA be able to implement automation quickly. Surprisingly, security and risk mitigation features are not as high a priority as expected for such enterprises, likely because they are mostly looking at automating parts of transactional processes and that they already have strong IT security measures in place
- During the pilot stage, almost all the five dimensions are equally important to enterprises, likely because, at this early stage of implementation, enterprises are in a test, observe, and learn mode. They might have developed a use case for employing automation, but their journey forward depends on the returns they achieve with the current implementations
- Those that are scaling up from pilots look for software quality and robot maintenance as well as security and risk mitigation features. As they take their next step forward, richness, reliability, accuracy, and control mechanisms of the underlying RPA software are what matter most. Also, as new business processes are automated, there is a chance of a larger number of exceptions arising, and so they also value ease of recoverability

Exhibit 10 presents the relative importance of the five dimensions by the scale of the responding enterprises

EXHIBIT 11

Drivers of RPA adoption by enterprise scale

Source: Everest Group (2018)



Variation by returns achieved from RPA

- Another notable observation is that those enterprises whose RPA initiatives did not meet their expectations noted security and risk mitigation as their primary concerns. This response raises two questions: whether vendors need to emphasize their products' security features more, or whether very risk-averse organizations are actually missing out on opportunities and potential for RPA's benefits
- The more successful adopters of RPA realize the importance of ease of maintenance and scalability to achieve ROI from their RPA initiatives. Ease of maintenance reduces overhead costs. Scalability ensures that enterprises achieve better outcomes with their initial investments

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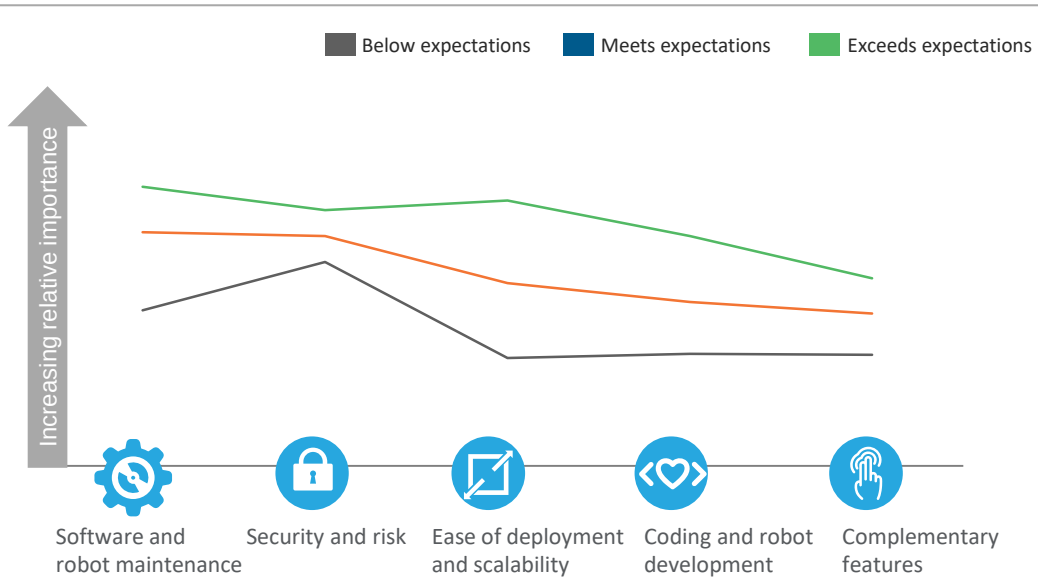
Exhibit 12 presents the relative importance of the enterprise RPA dimensions by the returns achieved by organizations so far

EXHIBIT 12

Importance of RPA features versus returns achieved

Source: Everest Group (2018)



There is more to enterprise RPA than technology

Technology that is not well supported does not have a place in the enterprise

Study participants rated support services from the vendors as important:

- *Good product support and maintenance services:* This ranking links to the preference that we observed earlier that software quality and robot maintenance are very important features of enterprise RPA
- *Easy access to robust product training:* Organizations want good and accessible training in their chosen RPA software. Assisting an enterprise in developing a Center of Excellence (CoE) and training future trainers could be one of the ways vendors can add value to their relations
- *Open source product training courses and material:* Vendors can boost their training services by providing open source and up-to-date training materials on their websites that the users or trainers can refer to easily
- *Good technology partner ecosystem for complementary technologies:* As enterprises look at extracting greater value from their deployed RPA solutions, they want easy and reliable access to specialists for requirements such as implementing analytics and cognitive technologies on top of RPA. Consequently, this factor was rated higher by those enterprises that are either scaling up or are in steady-state implementations, versus those that are planning or piloting on their RPA journey
- *Good ecosystem for implementation partners:* This increases enterprises preferences for an RPA solution as it helps them get consultants or bring in skills when they need it in the geographic region of their choice

Exhibit 13 summarizes these findings.

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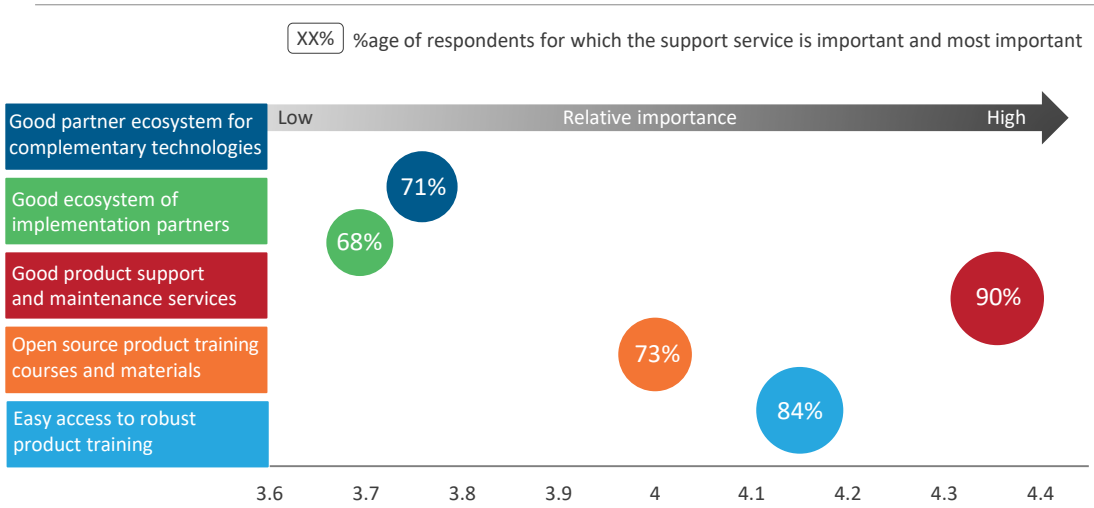
EXHIBIT 13

Drivers of RPA adoption by returns achieved

Source: Everest Group (2018)



With different scales of operations, enterprises understandably prefer different commercial models for purchasing RPA solutions

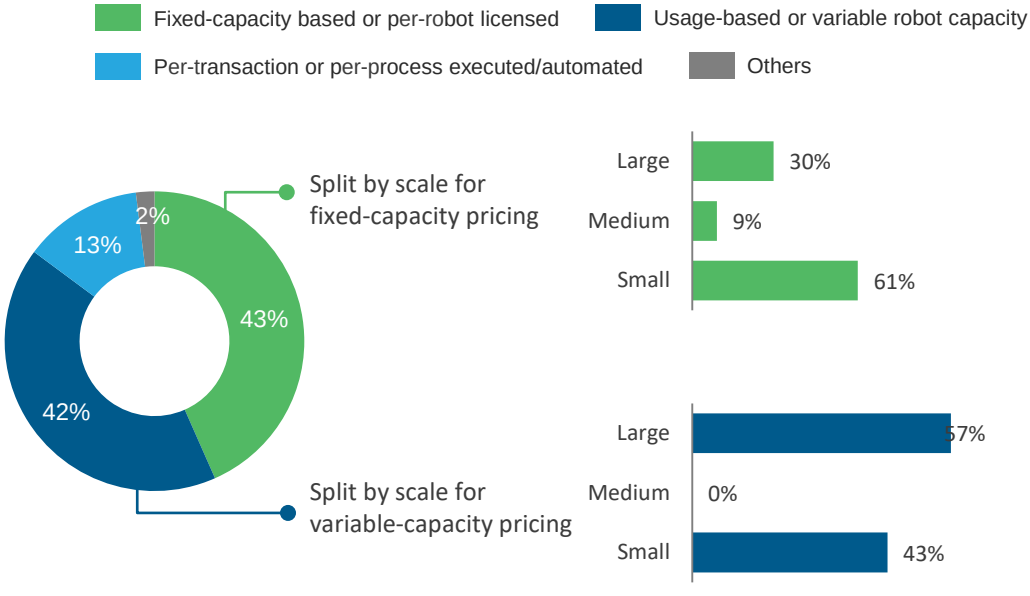
- *Fixed capacity-based or per-robot licensed:* Mostly preferred by small-scale enterprises, this model allows them to understand and control their costs and capacity
- *Usage-based or variable robot capacity-based*: Large enterprises show a preference for this model to accommodate fluctuating demand and capacity. This preference could change over time, once enterprises learn their average capacity utilization or reach steady-state implementation
- *Per-transaction or per-process-executed based*: This pricing model is currently relatively less preferred. RPA solutions are generally employed for high-volume, transactional processes, and enterprises might not find it favorable to proportionally increase their costs as they employ robots for a larger number of processes/transactions

Exhibit 14 shows the percentage breakdown of respondents' preferences for a specific commercial model along with the split by scale of responses that preferred fixed capacity- and variable capacity-based pricing

EXHIBIT 14

Split of responses for commercial model preferred (by percentage of respondents)

Source: Everest Group (2018)



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The link between RPA adoption maturity and higher returns

More mature RPA adopters show higher satisfaction levels with their RPA returns

Exhibit 15 shows that satisfaction with RPA investment increases as a firm moves through the RPA implementation maturity stages. The premise that greater maturity of RPA contains greater utilities should be a strong message to risk-averse organizations that miss out on various opportunities that automation could deliver. Another way to look at it is that only those enterprises that achieve success with RPA go on to scale up and earn greater returns.

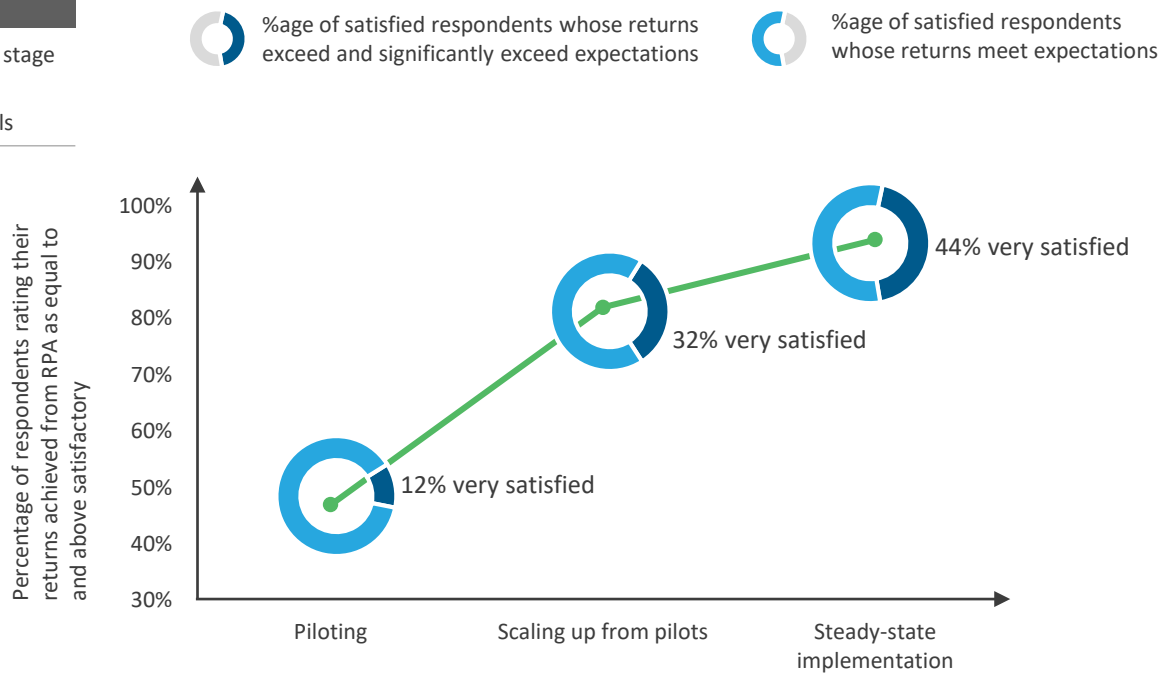
The increase in satisfaction levels can be attributed to the following reasons:

- *Improving margins:* As enterprises use robots for more transactions/processes, they recognize additional operating costs reductions as robots' working hours are not limited. RPA solutions also enable enterprises to strengthen their top line by delivering a smoother experience to their customers and, as a result, improving margins
- *Upskilling internal talent:* Enterprise-level RPA implementations take the workload off of the manual workforce, freeing them to engage in more judgment-intensive tasks. Also, as business units start to independently create and deploy robots and continually train on RPA platforms, they enhance their automation skills, and firms become less dependent on external sources of RPA talent
- *Extracting complementary values:* Beyond automating processes, RPA provides additional significant values to the enterprises, such as streamlining operations, easier regulatory compliance, leveraging digitalized processes and data to extract valuable insights, an opportunity of technological upgradation by complementing RPA with AI/cognitive, and a competitive advantage over other market players

EXHIBIT 15

Trendline representing stage of RPA implementation versus satisfaction levels

Source: Everest Group (2018)



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Conclusion

Enterprises are achieving good returns from RPA as highlighted by over 75% of enterprises that responded to our study. This high satisfaction is fueling demand and market growth. RPA vendors can get ahead of competitors in this fast-growing market by providing the features in their software that have been rated highly in this study, including ease of robot coding and deployment as well as support for scaling up, all in a secure robot environment that offers good operational management and controls. AI and analytics of various kinds were also rated as important. Other factors, such as easy access to RPA training and skills, good product support and partner ecosystem, were also considered to be key aspects of enterprise RPA.

The way forward for RPA vendors

RPA vendors should examine the need for faster robot development and deployment. There are ways they can add value, for example by providing extended libraries with methods or robot components for industry-specific or function-based processes. Partners can complement vendors' technical skills with process knowledge to develop these libraries.

The addition of AI to help with coding or creating no-code robot development could be the future game changer for the most advanced RPA vendors.

The study' findings on the services that support RPA implementations – support services, training and partnerships – show very clearly that vendors have more opportunities to create competitive differentiation.

The way forward for enterprises

It is quite clear that enterprises need to work with RPA vendors to have an ongoing dialogue with them, through user groups and advisory councils, to make sure that their requirements, such as ease of coding or scaling, are clearly understood by vendors and that features for such capabilities are constantly improved. Vendors already strive to do all of these things but the ongoing dialogue could give them laser-sharp focus on improvements that are most valued by enterprises.

Our research has found valuable insights for RPA vendors and enterprises that benefit both sides of the market and set the scene for future RPA software developments.

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About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

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