

# Automation decoded: Bridging fact and fiction

Exploring the realities of workplace automation

○ Insights ○ Challenges ○ Opportunities

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# Foreword

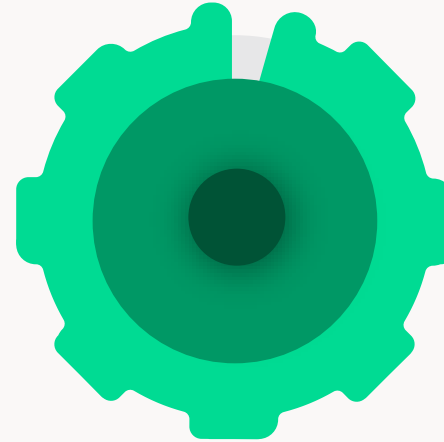
In an ever-evolving landscape where industries navigate the winds of change, a new era dawns upon us — an era driven by automation.

Picture this: a symphony of algorithms, intelligent systems, and digital assistants working in harmony with humans, and forever altering the way knowledge work is executed.

Today, we explore automation in the corporate world, with a specific focus on IT leaders and their experiences as they drive the adoption of automation across diverse sectors.

We understand the importance of automation, but what lies beneath the surface? How do IT leads implement automation, and do their expectations match the realities they encounter? As we illuminate those realities, we also explore the obstacles that hinder the widespread adoption of automation — for every transformative journey comes with its own set of challenges.

Join us as we navigate this automation landscape; Appfire and Isos Technology have come together to bridge the gap between fact and fiction.



**Automation has emerged as an indisputable imperative in the corporate landscape. Our research shows — 94% of IT leads agree that automating day-to-day processes is a strategic priority for the business; even within mature automation landscapes.**

# Introduction

The significance of automation lies in its potential to revolutionize and optimize various aspects of work within organizations. Understanding the intricacies of how these organizations implement automation is crucial for unlocking efficiencies and safeguarding against potential challenges.



To gain insights into the current state of automation, we conducted over 200 interviews with automation experts and IT leaders across industries. Our survey addressed key inquiries:

- Where is automation most prevalent?
- What are the use cases for automation in different industries?
- Where do the biggest opportunities lie?
- What are the benefits of automation and do they align with expectations?
- How do perceptions differ between business function and organizational levels?
- What are the barriers that keep different functions from automating day-to-day processes?

“

*“Businesses are perpetually trying to stay competitive and grow profits; an impact of that is trying to do more with less. Today, a number of factors only heighten such a need: economic headwinds, layoffs, and the rapid growth of AI in the competitive landscape. **Automation is not only a way to do more with less now; it’s a strategic imperative if you want to stay viable as a business.**”*

— Alex Viale, Director of Product Management - Workflow & Automation at Appfire

# Methodology

The automation report is based on data from an independent quantitative study conducted by research consultancy firm Adience — a specialist in global B2B market research and strategy. Adience surveyed 217 IT decision-makers online, and by telephone, during April of 2023.





### Countries

Adience conducted interviews with 217 decision-makers in three countries:

- US: 74%
- Canada: 14%
- UK: 12%



### Company sizes

Organizations were separated into three size categories:

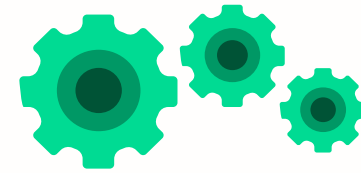
- 1-500: 40%
- 501-5000: 43%
- 5,001+: 17%



### Industries

Respondents represented the following verticals:

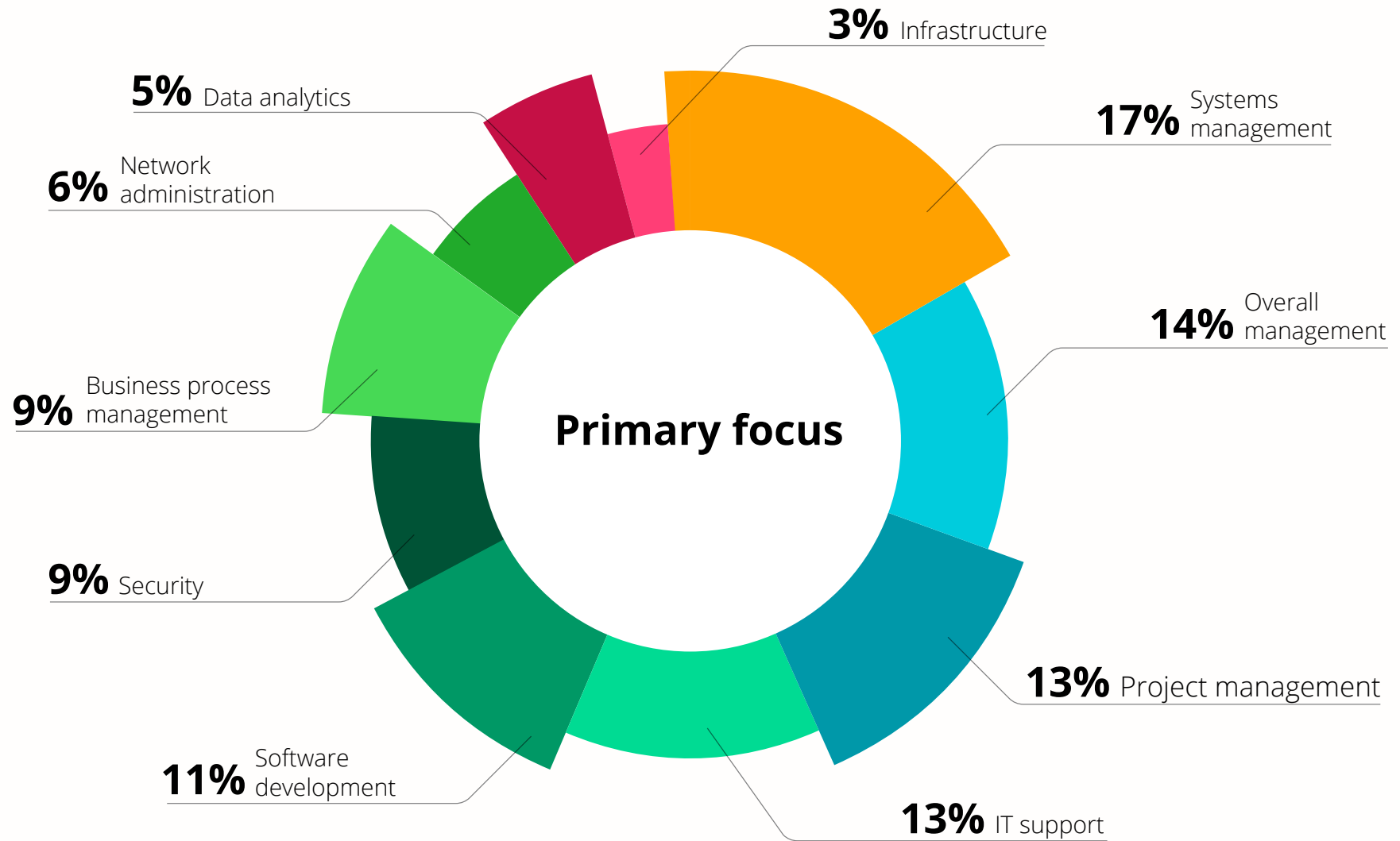
- Software and services: 19%
- Industrial and manufacturing: 17%
- Financial services: 12%
- Retail and eCommerce: 11%
- Education: 10%
- IT hardware: 9%
- Transportation and logistics: 6%
- Healthcare and pharmaceuticals: 6%
- Professional services and consulting: 6%
- Entertainment and media: 1%
- Travel and leisure: 1%
- Government (federal, state or local): 1%
- Non-profit: 1%



### Maturity

Automation implementation maturity was sectioned as follows:

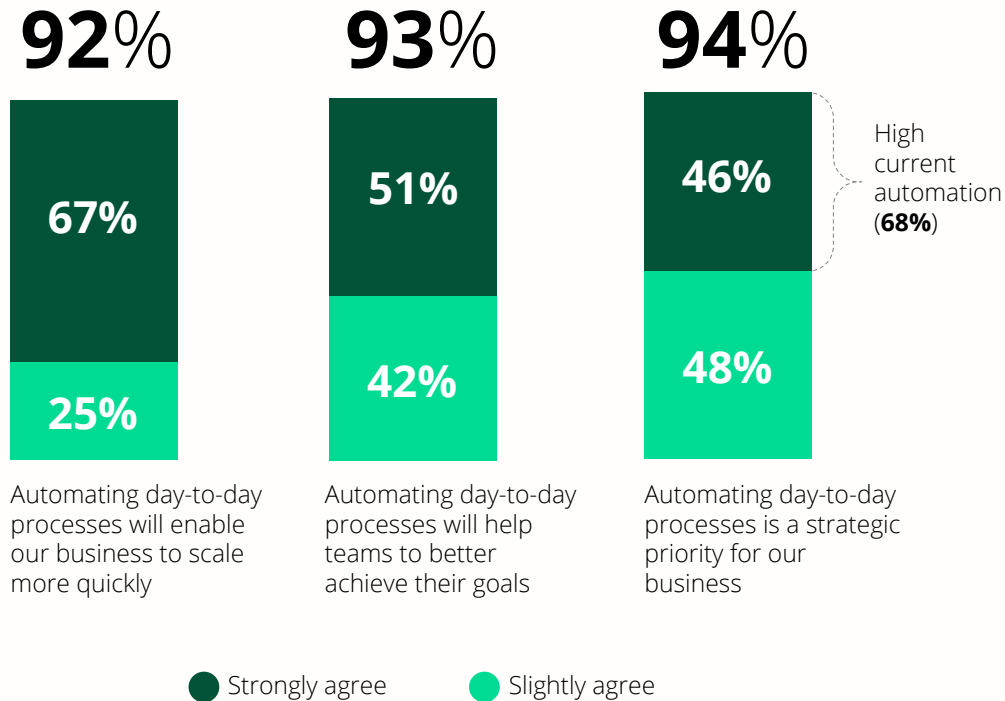
- Low maturity (1-50%) — few processes automated: 31%
- Medium maturity (51-75%) — many processes automated: 51%
- High maturity (76-100%) — most processes automated: 18%



Respondents were asked what their primary focus is, within the IT team.

# The promise

# The promise of automation is clear



Source: Q1

The promise of automation is clear: increased productivity, improved accuracy, cost savings, and scalability. It comes as no surprise that 94% of businesses consider automation a major strategic priority.

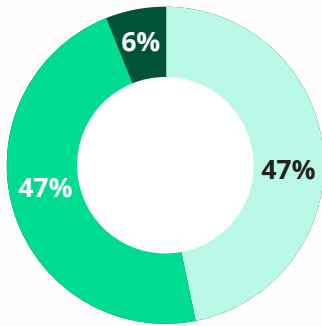
Automation has become indispensable in today's world. Even businesses that have already achieved a high level of automation recognize day-to-day process automation as a top priority in their strategic plans.

In fact, businesses that have already advanced along the maturity curve are even more likely to agree with the statement that automation is a strategic priority.

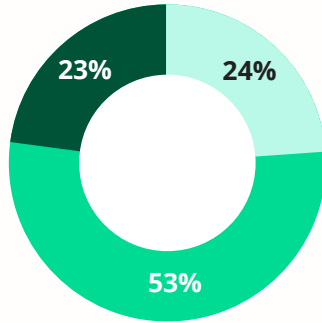
Out of all respondents, 46% strongly agree that **automation is a strategic priority**; this number rises to 68% among those with high maturity. Which indicates that high maturity organizations are much more likely to say that automation is a priority, compared to the average.

# Company size vs. automation maturity

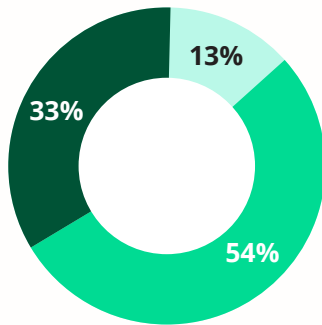
**Small Organizations**  
(1-500)



**Medium Organizations**  
(501-5,000)



**Large Organizations**  
(5,001+)



- High automation
- Medium automation
- Low automation

In general, medium and large-sized companies have already automated more of their day-to-day, whereas smaller companies show lower levels of automation in their processes. It is expected, given that larger organizations tend to have greater resources and dedicated IT teams. **The main drivers for adopting automation across all company sizes are increased productivity, improved accuracy, cost savings, and scalability.**

Nonetheless, smaller organizations can also benefit from automation, albeit with different considerations based on their unique needs and resources.

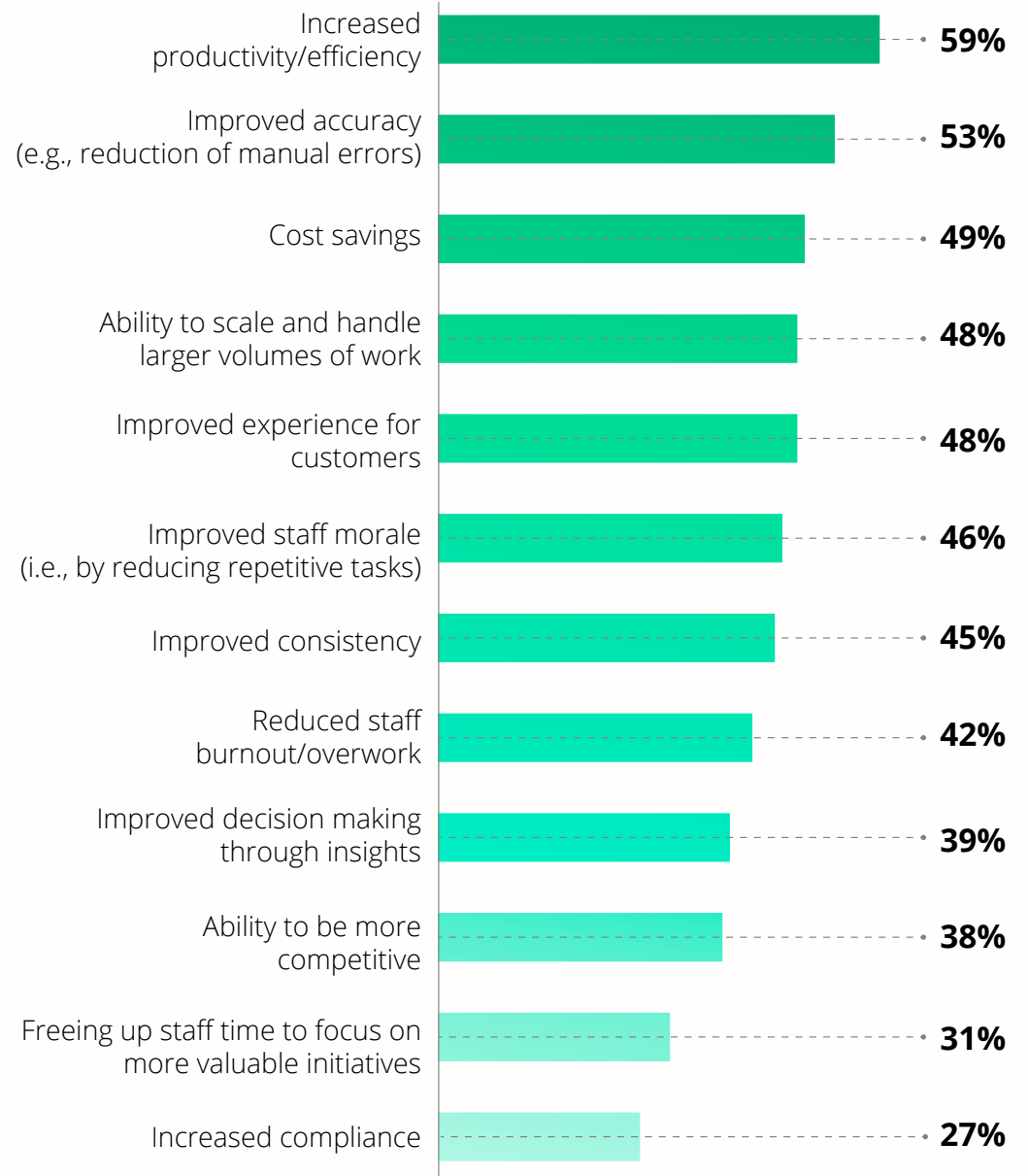
Source: Q2 and Q3.

# Perceived benefits of implementing automation

The primary perceived benefits of implementing automation in organizations are increased productivity and efficiency (59%), improved accuracy (53%), and cost savings (49%).

Other perceived benefits include scalability, as well as providing a better experience for customers and staff alike.

Source: Q4.

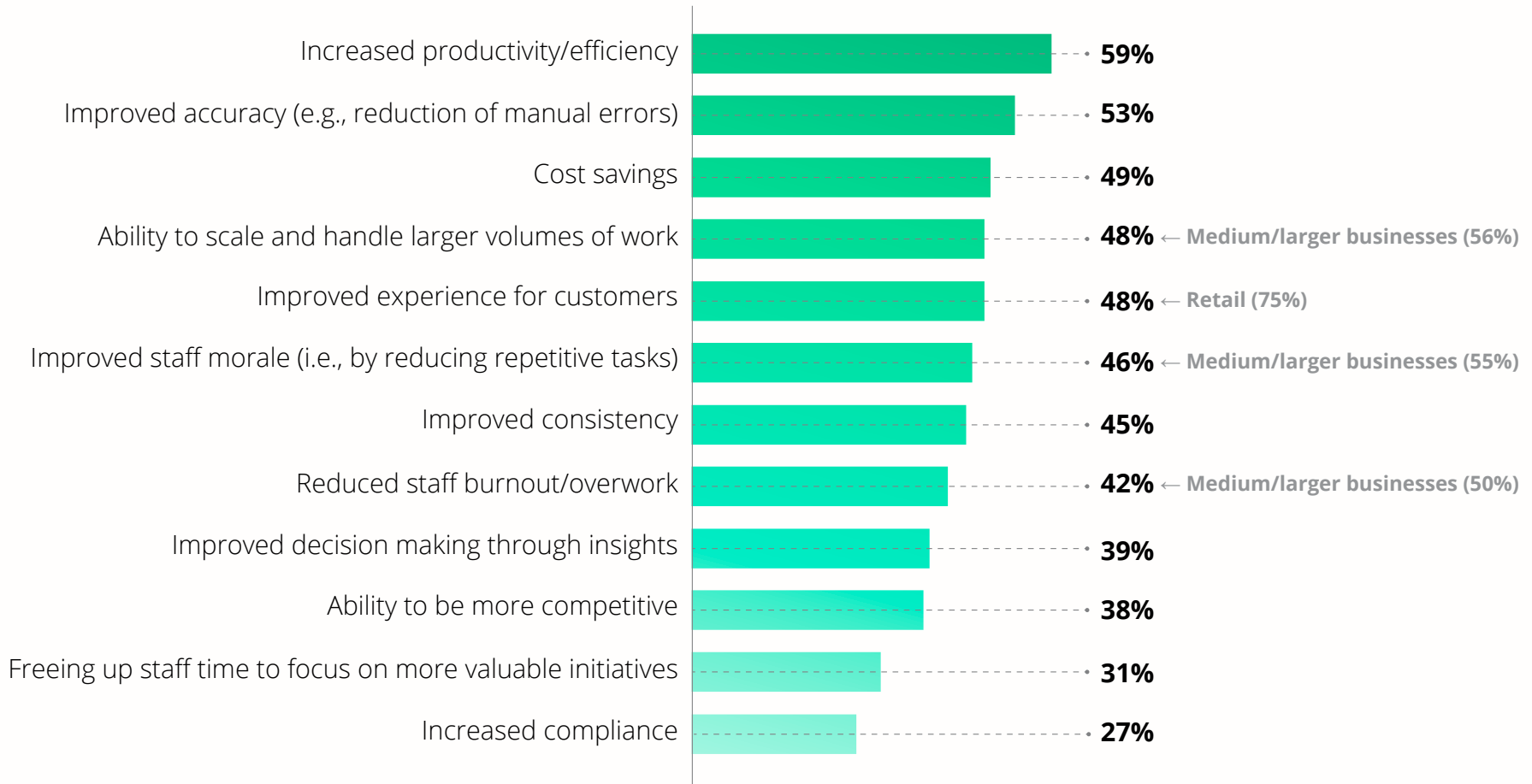


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*“Over half of respondents see the reduction of errors as a primary benefit of automation, and we couldn’t agree more. We tell clients all the time that highly repetitive, **rudimentary tasks have unforeseen consequences, simply due to human nature and basic errors.** Automating these tasks should be a huge, first-order priority for businesses new to automation.”*

— Andrew Baumann, Director of Strategic Accounts & Pre-sales at Isos Technology

# The theory: Priorities vary based on company size.



Source: Q4.



## The promise

Larger businesses are more likely to consider scale, staff morale, and staff burnout as priorities. Smaller companies, on the other hand, focus on “hitting the ground running.”

Surprisingly, **only 27% of respondents implement automation for compliance purposes**, potentially due to resistance to change, lack of trust in automation, or evolving regulatory requirements.

We anticipate that compliance will become a more central goal for automation initiatives over the next couple of years, due to the high cost of non-compliance, including damage to brand reputation. It's an area ripe for automation, especially within highly regulated industries and large enterprise use cases. As the use of automation increases across the organization, we should see more organizations using automation to ensure compliance.

Additionally, it's worth noting that **the retail industry is much more likely to use automation to drive customer experience than any other industry (75%)** – and the majority see positive results.



## What are the risks of not using automation?

*“There would be a repetitive process by the worker that can lead to inaccuracy at work”*

*“Customer experience will decrease, consistency will be poor and it will not be possible to grow faster in the market”*

*“Increased cost, reduced efficiency, lower quality, missing opportunity, and reduction of competitiveness”*

*“The business remains in the same position and less profitable”*

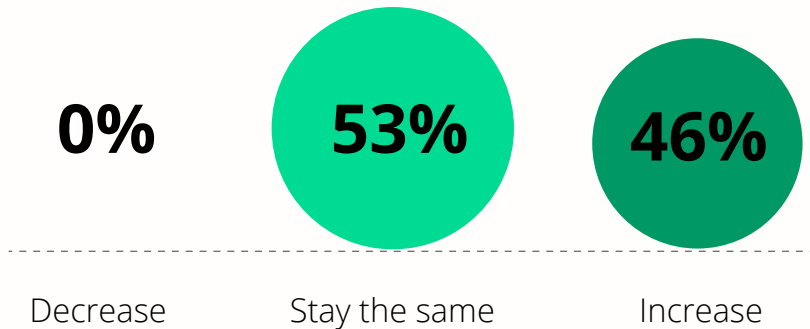
*“The business would be less competitive”*

*“Competitors can take advantage as there is continuous research and development going on it for the innovation”*

Source: Q5.

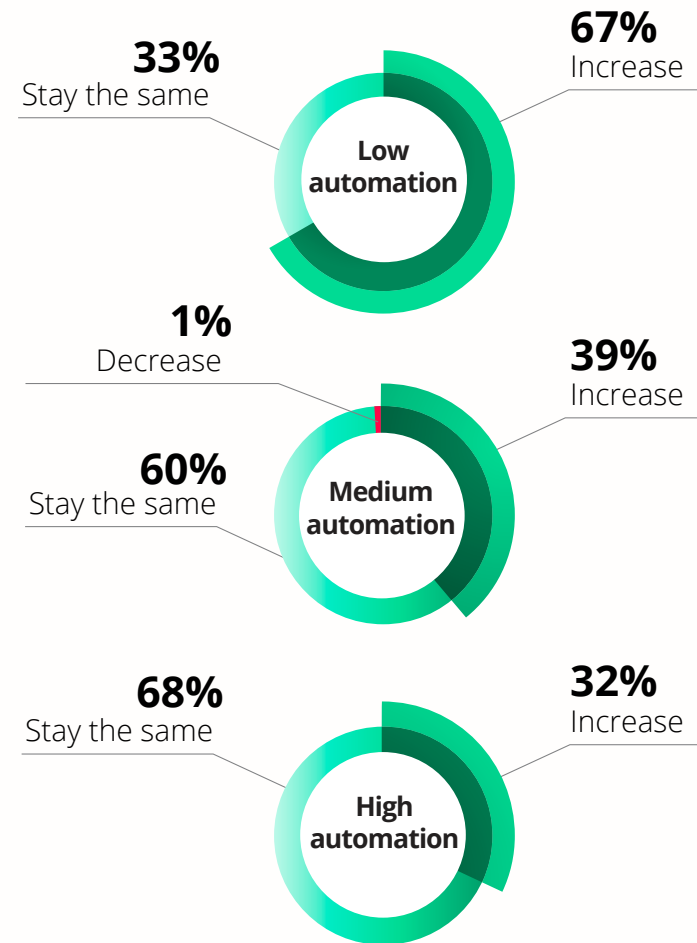
Companies clearly understand that the lack of automation is accompanied with a loss of efficiency and accuracy, as well as failure to keep up with competitors.

# Expectation of automation change in the next 6 months



Source: Q6.

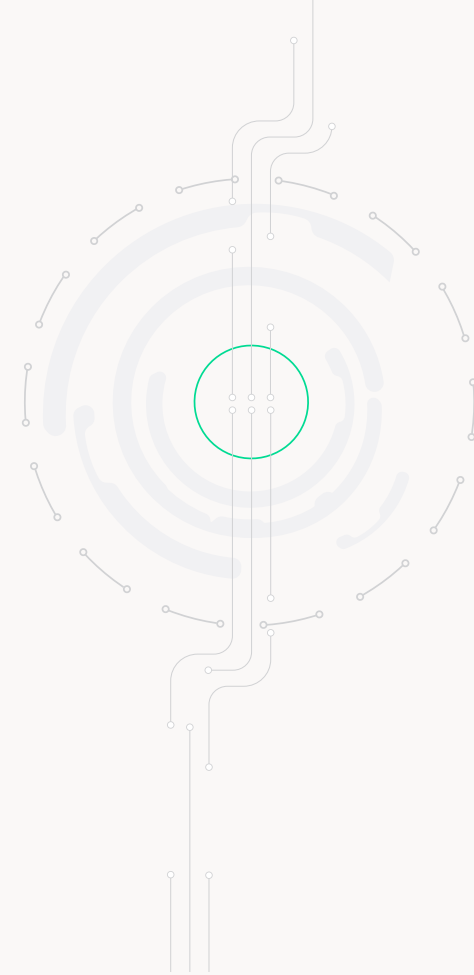
All survey respondents indicated that they would continue investing in automation over the next six months; 53% said that they would remain at their current level, while 46% said they would increase. Less automated companies are



more inclined to increase their level of automation (67%). Around a third of medium and highly automated companies are planning to increase their automation further; they recognize the advantages, and understand the necessity.

## To summarize:

- Automating day-to-day processes is a **strategic priority for 94% of businesses.**
- 92% believe that automating day-to-day processes will enable them to **scale their business more quickly.**
- 93% believe that automating day-to-day processes will **help teams better achieve their goals.**
- The potential benefits are clear — increased productivity/efficiency, improved accuracy, and cost savings.
- Nearly half of organizations (46%) are expecting to **increase their level of automation** in the next 6 months.



## Are we living up to the promise, or is there still a gap to bridge?

# The reality

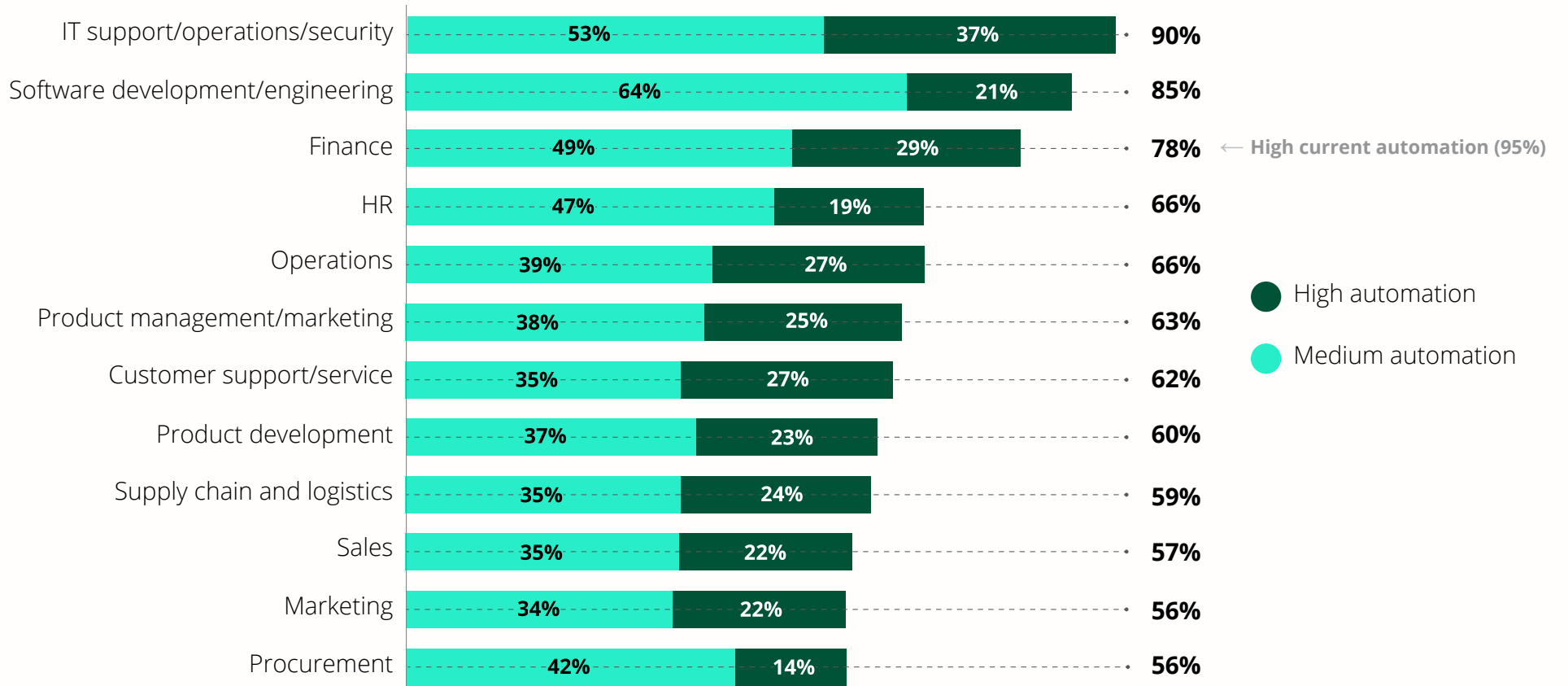
The journey from promise to reality is where we find opportunity.

“

*“While there are differences in the depth of automation among business units, it’s clear that automation and its benefits span across them, beyond just traditional IT and software groups. **Growth in automation among business units (and across knowledge workers in general) will only continue**, along with the reduced need for technical skills, in order to implement and benefit from automation.”*

— Alex Viale, Director of Product Management - Workflow & Automation at Appfire

# Automation by business function



Source: Q7.

**The most prevalent department for automation is IT support, operations and security (90%), followed by software development and engineering (85%), then finance (78%).**

For IT support, operations, and security, more than half of the respondents rated their automation level as medium, while a third reported high levels of automation. But, as we move further down the chart, it becomes evident that despite a certain degree of automation, fewer respondents report high levels of automation in their day-to-day processes.

**Overall, finance is one of the areas where we find some of the highest levels of automation.** Particularly in highly automated organizations, the finance department is more likely to have a high or medium level of automation (95%).

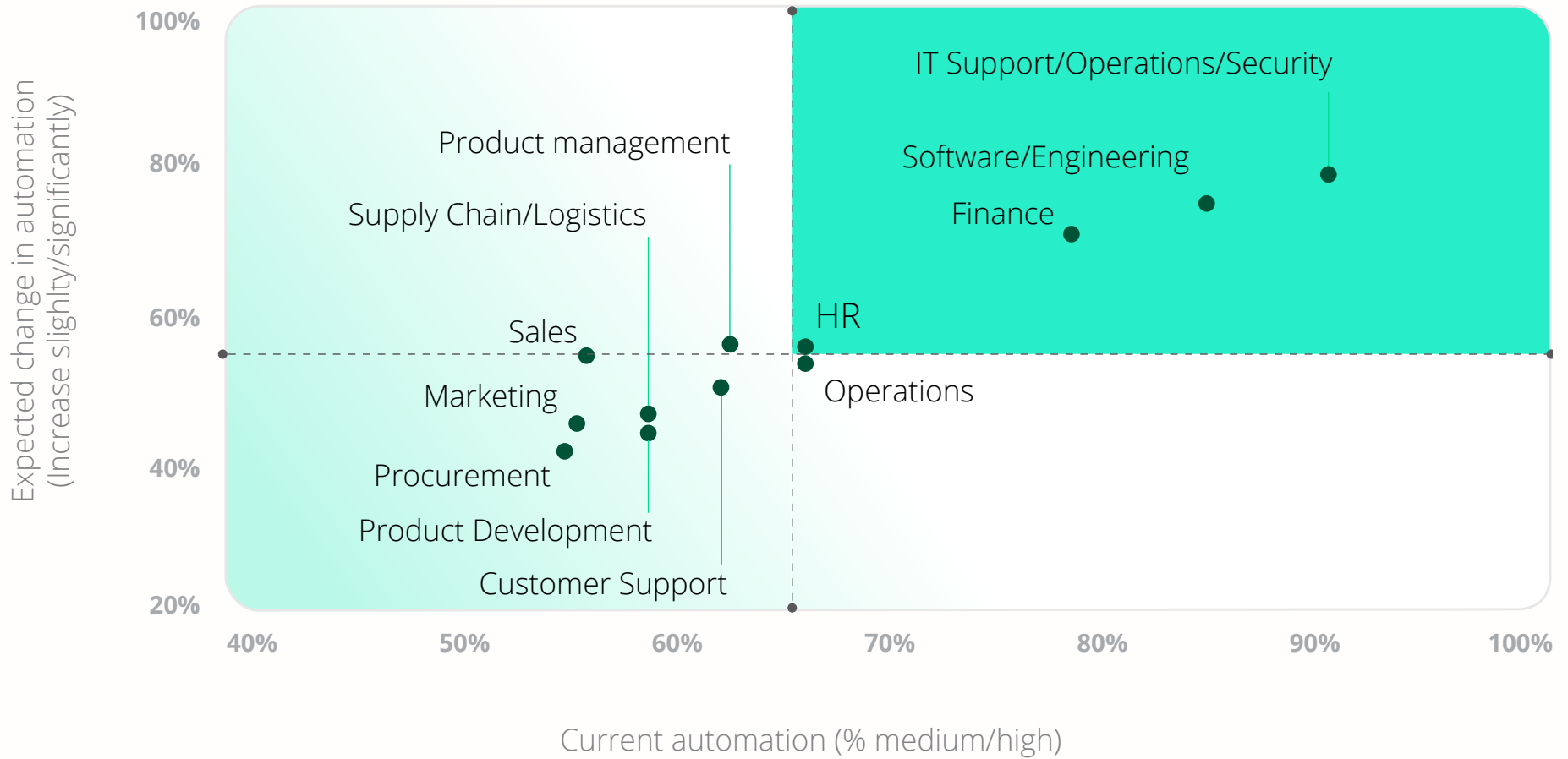


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*“When you increase automation, you reduce security issues and compliance issues, but you also reduce the likelihood of mistakes being made in operations.”*

— Doug Kersten, [Chief information Security Officer at Appfire](#)

# Likelihood to automate further



Source: Q7 and Q8.

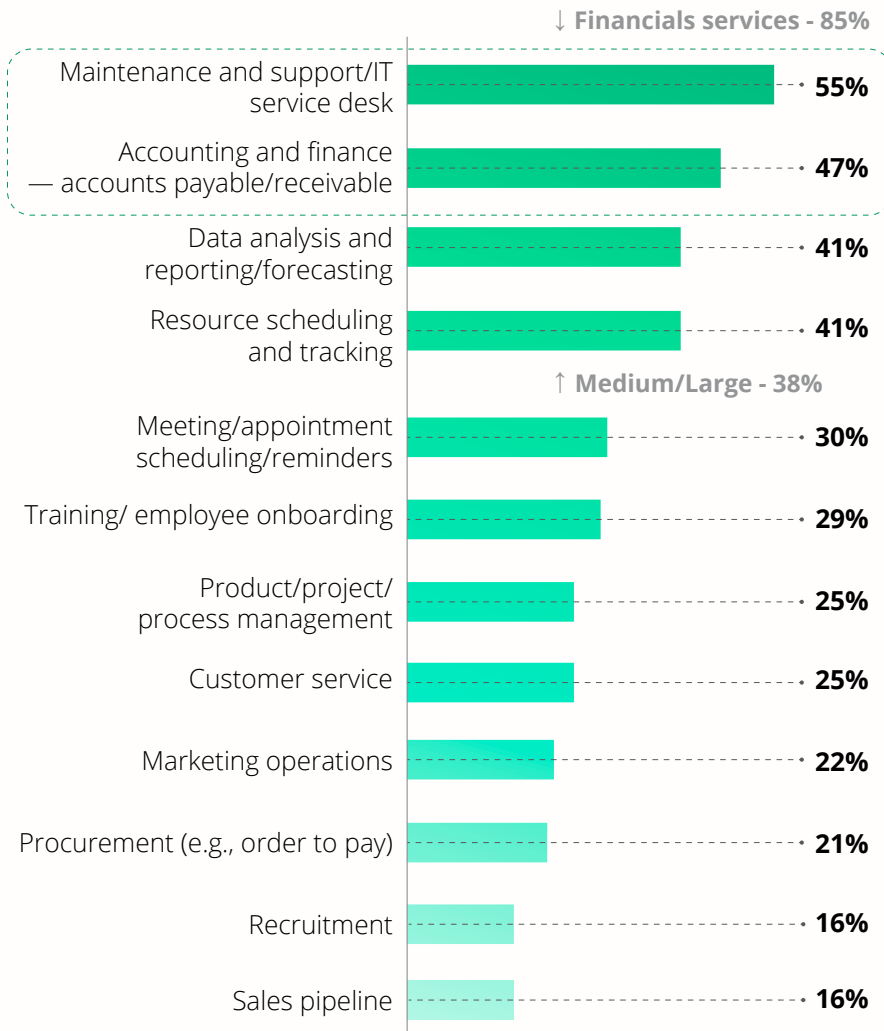
## ○ The reality

This chart gives an overview of the current automation levels across different departments. We also asked about the expected changes in automation levels within these specific business functions over the next 12 months.

The top right quadrant includes three business functions: IT support, operations and security, software engineering, and finance. These functions have high current levels of automation, while expecting to increase those levels in the next 12 months. This indicates that business functions which have experienced the highest degrees of automation recognize the benefits, and plan on increasing automation levels further.

**As it stands, the gap is going to widen — those with the highest levels of automation are most likely to further automate.**

# Most common processes automated



Source: Q9.

The main processes being automated are IT support and service, as well as accounting and finance.

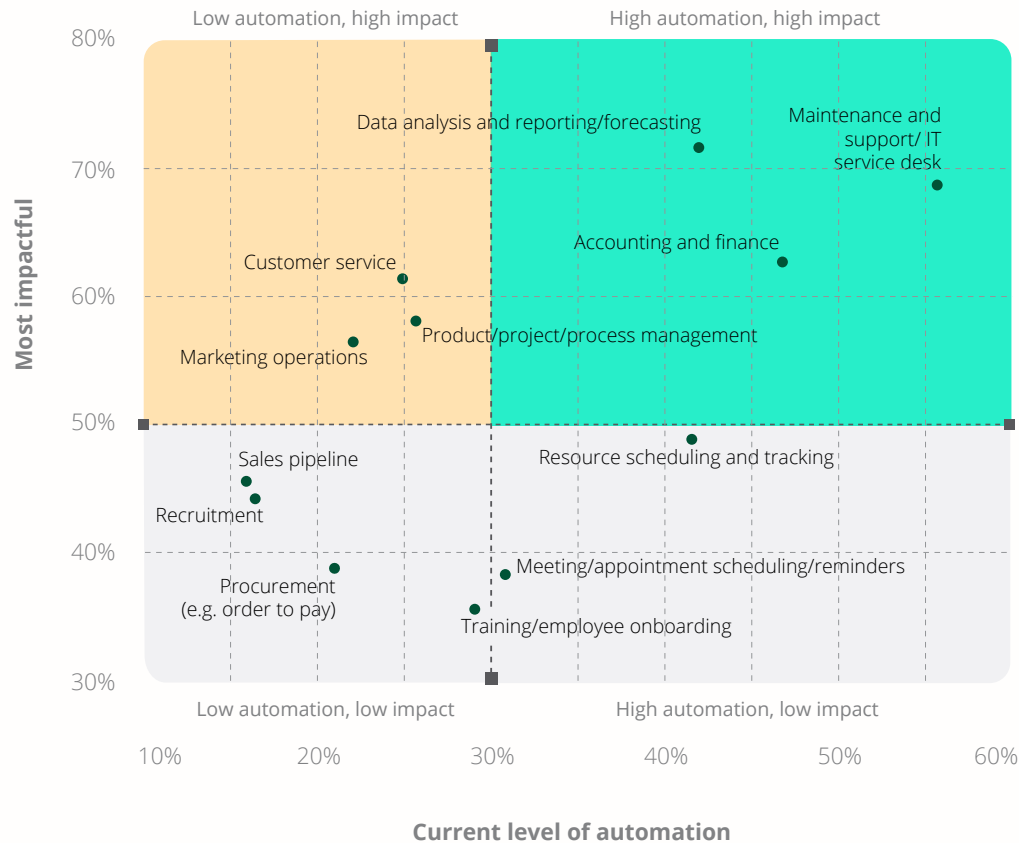
Additionally, larger organizations are more likely to automate their meeting schedule and reminder processes, due to the large scale, and need for increased collaboration.

Given their high level of automation, it is understandable that IT and software engineering teams automate processes like maintenance and support, or IT service desk. In the financial sector, automating accounts payable and receivable processes is a common practice for 85% of organizations.

In general, data analysis, reporting and forecasting, and resource scheduling also exhibit relatively high levels across the board.

On the other hand, a significantly smaller number of organizations claim to have implemented automation in the areas of marketing, procurement, recruitment, and sales — meaning ample potential still lies dormant.

# Implementation vs. impact of automation



Source: Q9 and Q10.

With various processes being automated in organizations, let's look at automation use cases that have achieved the highest impact.

- **Green quadrant** (high adoption, high impact): indicates that data analysis and reporting, maintenance and support, as well as accounting and finance are amongst the highly-automated processes that have proven most impactful in an organization.
- **Yellow quadrant** (low adoption, high impact): symbolizes missed opportunities for organizations that have not yet invested in automating customer service, marketing operations, as well as product, project and process management. Even the low levels of automation to date already prove highly impactful — indicating that if organizations double-down on automation in those specific areas, they could yield significant results.

Use cases in the lower half of the chart have shown lower impact for those who have implemented them. Therefore, organizations should prioritize use cases in the top half of the chart, which have a proven impact.

# Where is automation most impactful?

## Data analysis and reporting/forecasting

*"Gives a **clearer picture of our progress** and success"*

*"**Less time and manpower** being utilized on these tasks"*

*"It **helps to understand trends, areas of improvement and risk factors**, which is very important to manage risk"*

*"Examine large amounts of data from different sources and enables them to **identify inefficiencies and opportunities** for organizational improvement"*

## Maintenance and support/IT service desk

*"They are able to **resolve tickets at a high rate**"*

*"These are **often time consuming** low value tasks"*

*"**Streamline workflows and processes**, and improve security and agility."*

*"This helps our **technical team with efficiency** and speed things along"*

## Accounting & finance — accounts payable/receivable

*"It's helped **make our accounting department more streamlined**"*

*"It **saves tons of time** to automate payable and receivable accounts"*

*"Invoice processing through automation helped in managing direct spend, **reducing error and enhancing relationship with suppliers**"*

*"**No human mistakes**"*

Source: Q11.

Automation has had the most significant impact on data analysis, maintenance and IT support, as well as accounts payable and receivable. The main benefits include time savings, streamlined workflows, and reduced errors.

**Data analysis and reporting** automation sets the way to a clearer picture of progress. It requires less time and manpower, and assists in understanding trends (which in turn aids in managing risks effectively), as well as identifying inefficiencies and opportunities.

- **Maintenance, support and IT service desk** automation revolves primarily around enhancing efficiency. It saves time by enabling the rapid resolution of tickets, accelerating the overall process, and streamlining workflows.
- **Accounting and finance** automation reduces time spent by streamlining the department, speeding things up, and reducing errors.

“

*“This is exactly the kind of stuff we tell IT teams all the time — especially the “resolve tickets at a high rate” part. The easiest way to drive down your average time to resolution is by **automating as many manual tasks as possible!**”*

— Andrew Baumann, Director of Strategic Accounts & Pre-sales at Isos Technology



# Missed opportunities to consider

## Customer service

*"It **reduces turnaround time** for enhancing customer experience"*

*"Improve customer service response speed, **save customer time, retain customers**"*

*"It provides email communication or helpline through bots that **ensure customer satisfaction**"*

*"Because it **improves customer satisfaction and helps me save labor cost**"*

## Product/project/process management

*"Because we're **creating at a higher rate than ever before** with easier management"*

*"It will **increase work flexibility, and also track and control the progress** of a project"*

*"We can easily **balance time and cost** and ensure all steps are completed correctly and on time"*

## Marketing operations

*"It allows us to **market to the areas that are most impactful and high earning**"*

*"**Automating repetitive jobs** like e-mail marketing, social media posts and Ad campaigns"*

*"**Keeps marketing continually upgrading** and monitors analytics"*

*"Marketing being automated has led to **increase in users of our products**"*

Source: Q11.

**Customer service** automation aims to enhance the customer experience and reduce turnaround time on customer requests.

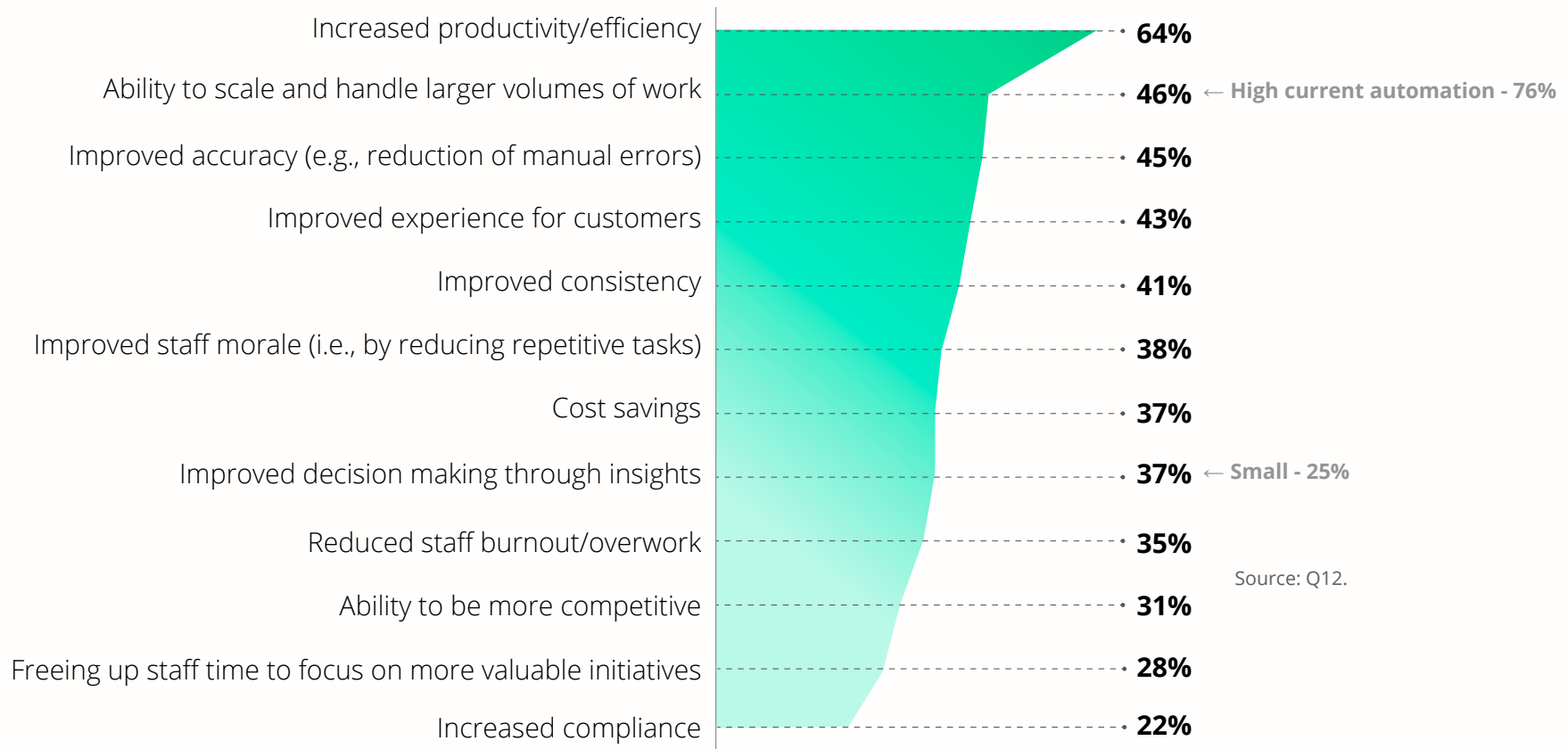
- Automation in **managing products, projects, and processes** helps improve flexibility. IT leads are able to do more, while balancing time and cost. Ultimately, it enables them to manage their processes more efficiently.
- Automation in **marketing operations** enables teams to market to those areas which are most impactful, while automating repetitive tasks, continually upgrading, and managing to increase the users of their products.

## To summarize:

- Automation is highest in the IT (90%), software (85%), and finance (78%) departments.
- Functions with the highest levels of automation are also the **most inclined to pursue further automation**.
- In line with their high levels of automation, IT support and service, as well as accounts payable and receivable, are the **most automated processes within organizations**. Larger organizations also automate meeting scheduling and reminders.
- There are **areas of opportunity for automation** in customer service, product, project and process management, as well as marketing operations. Even in areas with lower levels of automation, there is significant potential to achieve substantial results.

# ○ The expectation

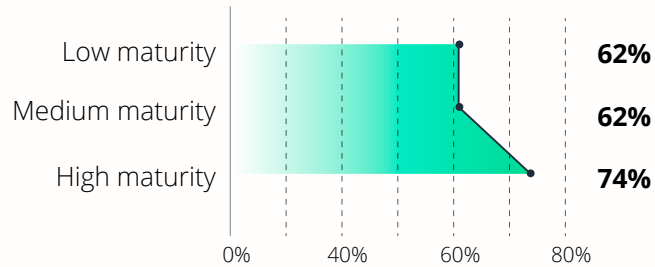
# True benefits of implementing automation



**Truth of the matter is; despite implementing automation, companies are not always realizing the promised benefits in practice — yet.**

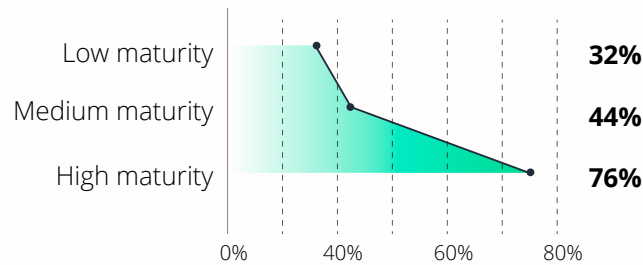
### The benefits of automation vary based on automation maturity and organization size.

#### Increased productivity and efficiency



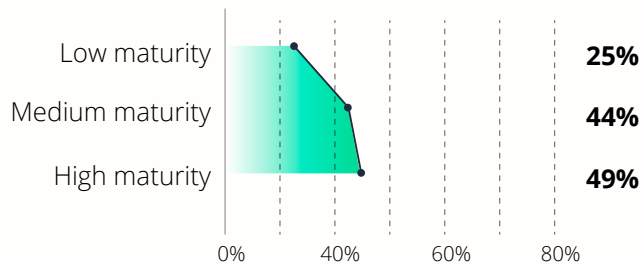
- The most significant impact of automation is seen in increased productivity and efficiency — with 64% of respondents on average saying that they've actually experienced increased productivity as a result of automation. Of those with high maturity, 74% recognize increased productivity, compared to 62% of those with low or medium maturity.

#### Ability to scale



- Less than half of IT leads report that automation has enabled them to scale their operations. Among those with high maturity, 76% recognize the ability to scale, compared with 32% of those with low maturity, and 44% of those with medium maturity.

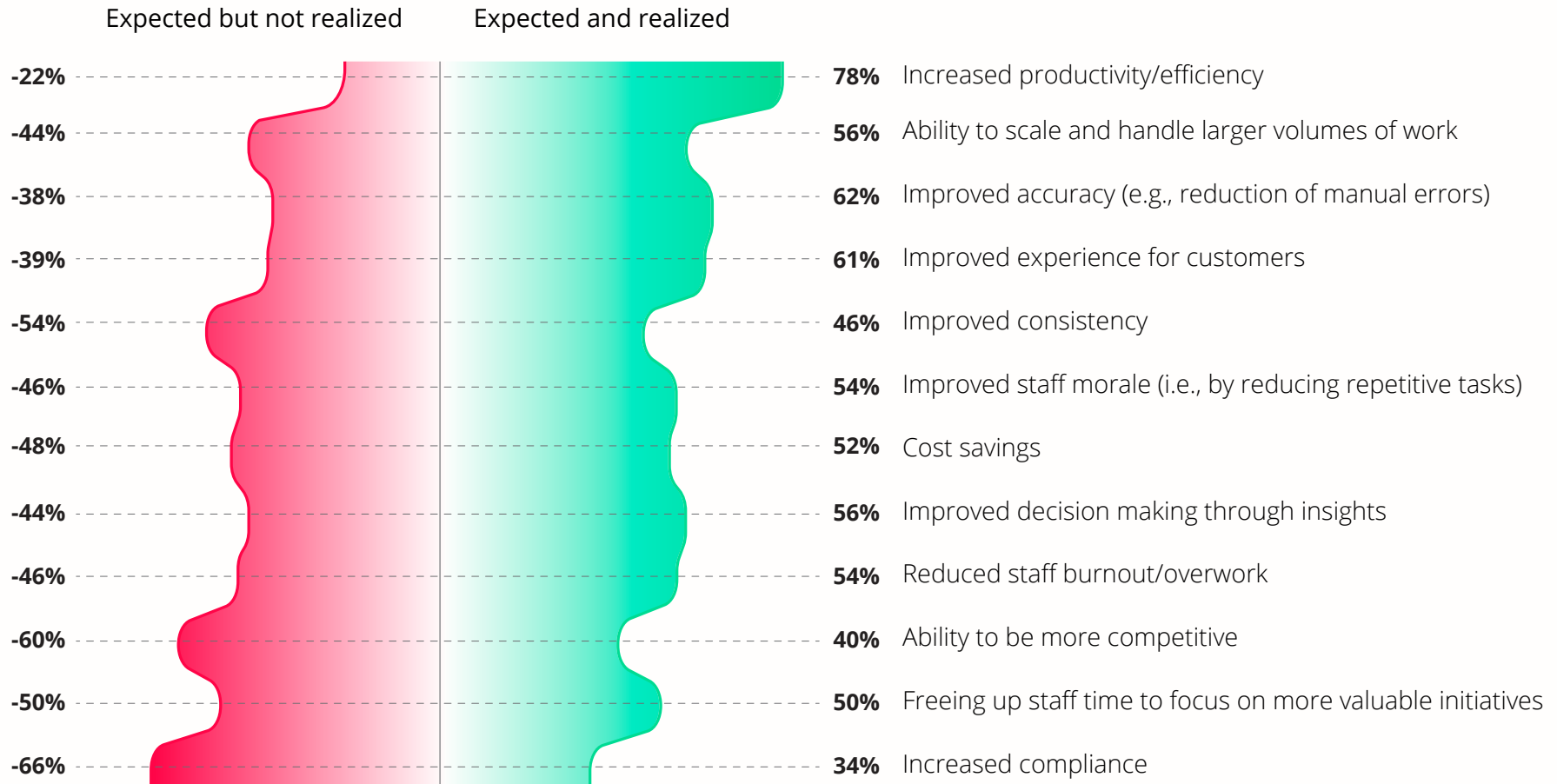
#### Improved decision making



- Small businesses are less likely to experience improved decision-making through insights, compared to other groups.

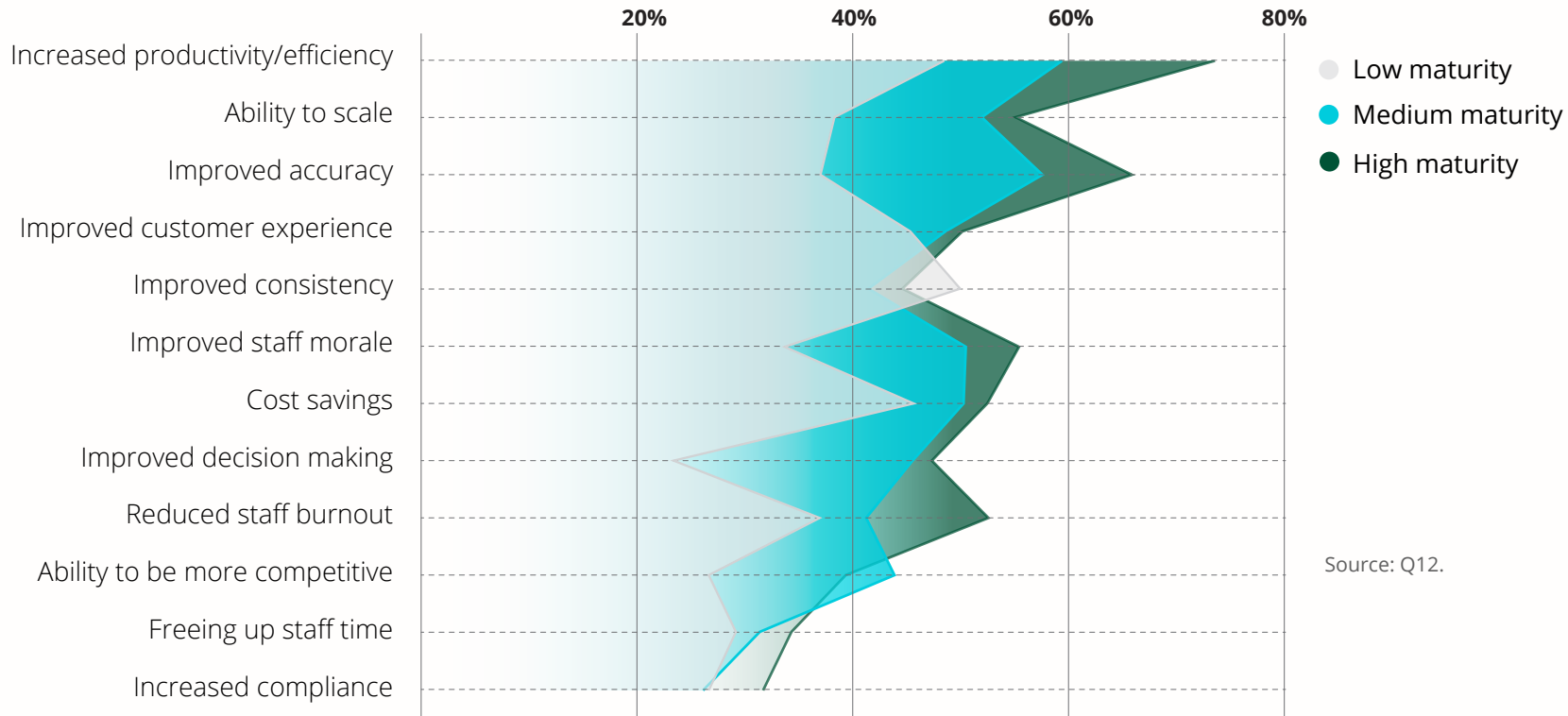
Does it mean that companies just starting with automation are expecting benefits or returns too quickly? Food for thought.

# Automation benefits vs. expectations



Source: Q4 and Q12.

○ The expectation



Source: Q12.

**The actual benefits of automation sometimes differ from the initial expectations.**

For instance, among those who anticipated increased productivity and efficiency as a result of automation, 78% did experience that benefit, while 22% didn't. In this case, most people who expected the result saw it fulfilled.

When we go further down the chart towards the ability to be more competitive, for example, only 40% of people who anticipated that specific benefit, actually experienced it.

As for increased compliance, only a third of people who expected it, experienced it.

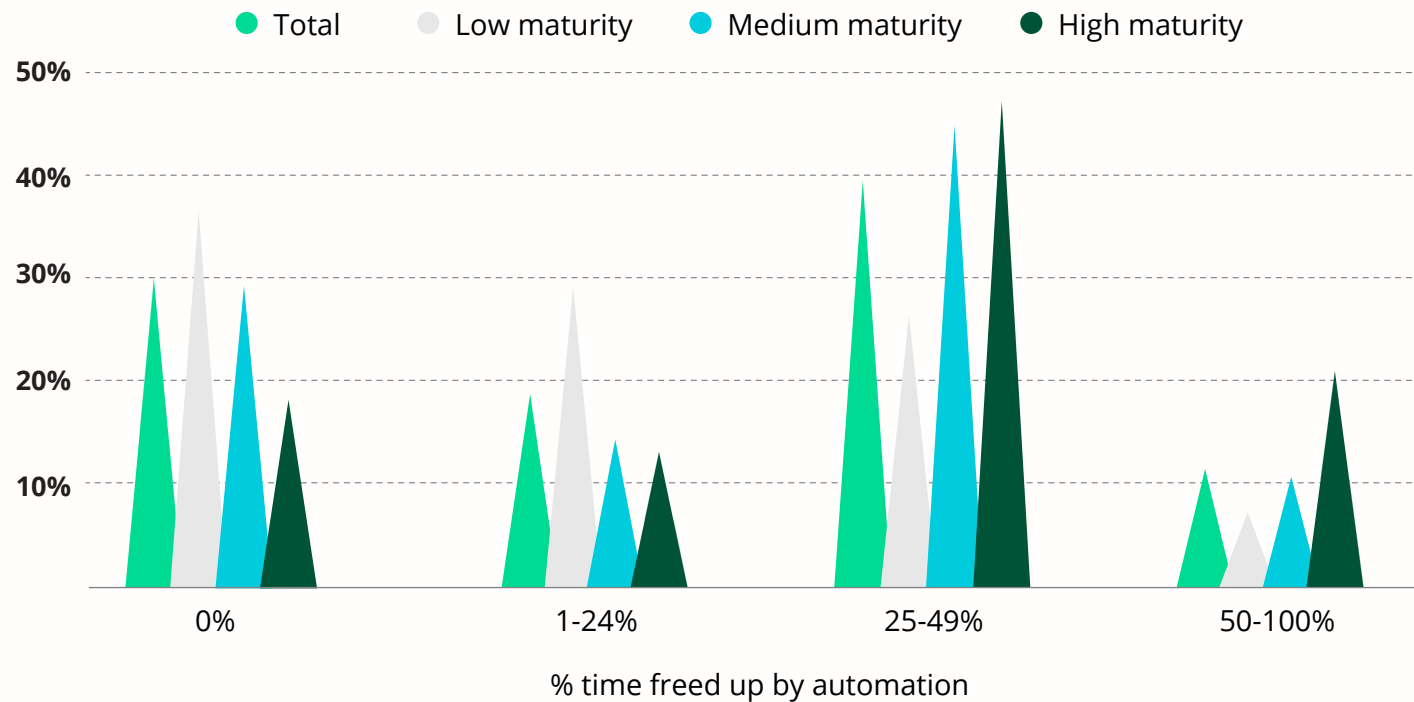
# What does it all mean?

Does automation not work the way we expect it to, or are the benefits taking time to emerge?

- When it comes to the organization's **ability to scale and handle larger volumes of work**, there is a threshold that must be surpassed for automation to truly empower a team. In administrative tasks, there is a workload threshold that needs to be exceeded through efficiency improvements, before taking on more work becomes feasible.
- There can be many reasons why the **ability to be competitive** is failing to manifest properly: implementation challenges (related to technical complexities, integration, or employee resistance), spiraling costs, lack of optimization, skills and training gaps, market dynamics (due to market conditions changing rapidly for example), and so on.
- **Increased compliance**, on the other hand, is a complex automation task, which is why most organizations have yet to fully experience its benefits. An important example to consider in IT Service Management is the automation of change management approvals, which proves to be exceedingly challenging to automate.
- Finally, as a company's automation processes mature, scalability and cost savings begin to manifest as tangible benefits. **The greater the adoption, the more pronounced the benefits become.**



# Time freed up by automation



On average, respondents report that automation of day-to-day processes has freed up 23% of employees' time — 17% of time freed up for companies with low maturity, 23% for those with medium maturity, and 31% for those with high maturity.

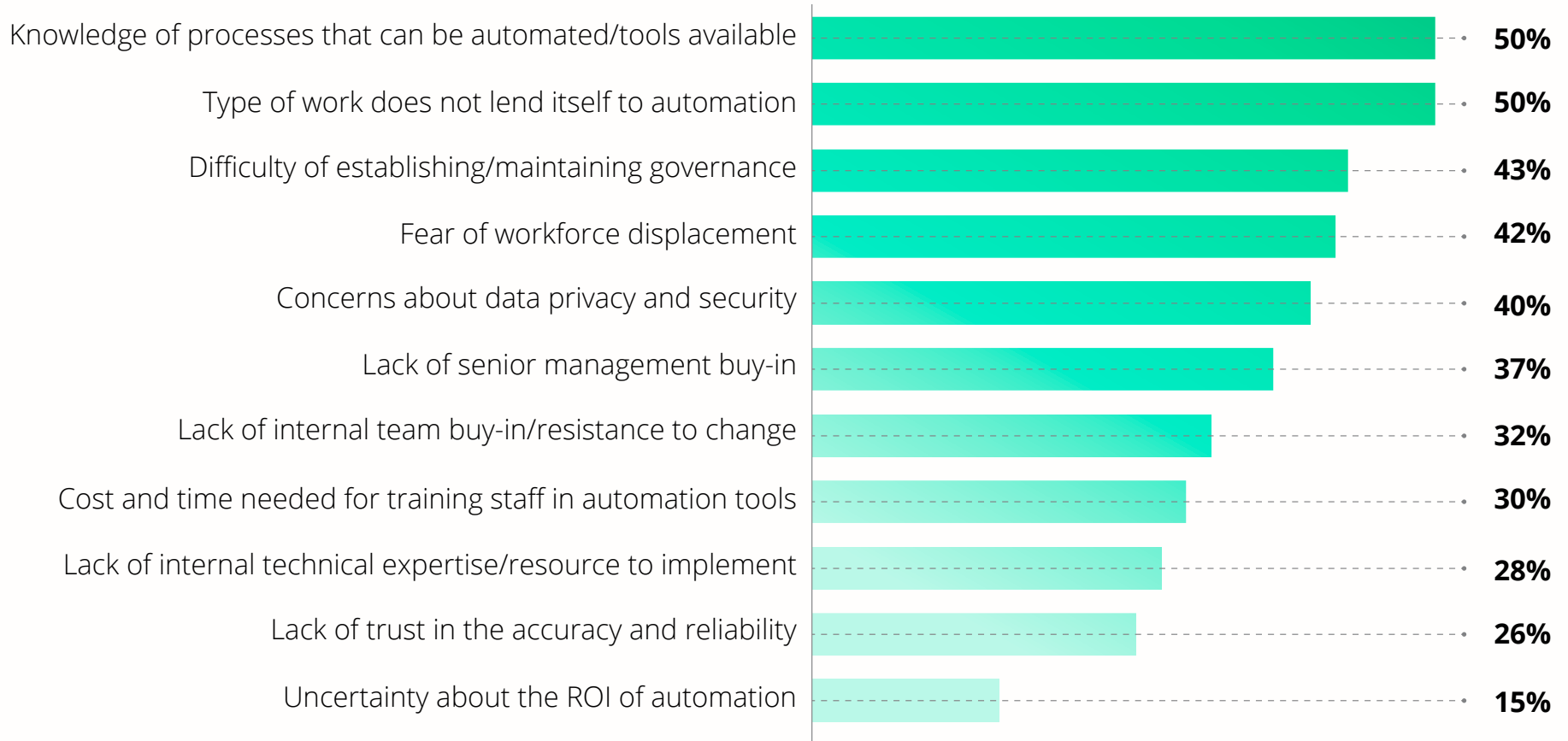
Within this average, 12% reported that more than half of their employees' time was freed up, while a third indicated that no time savings were observed as of yet.

**There are four theories explaining why some individuals may not have experienced time savings with automation:**

1. They don't track the data, and therefore, prefer not to provide an arbitrary figure.
2. Their perception of time saved may not align with a specific numerical value. While they acknowledge that minutes are being spared by eliminating certain tasks without knowing if that time is being utilized more productively, they refrain from quantifying it as "time savings."
3. The lack of proper implementation of automation could be a contributing factor.
4. While adoption can free up an individual's time to focus on higher-value work, that doesn't necessarily translate into a meaningful reduction in their overall workload.

**Companies with mature automation processes are more likely to experience significant time freed up as a result of their automated processes.**

# Obstacles to unlocking potential benefits



Source: Q14.

## ○ The expectation

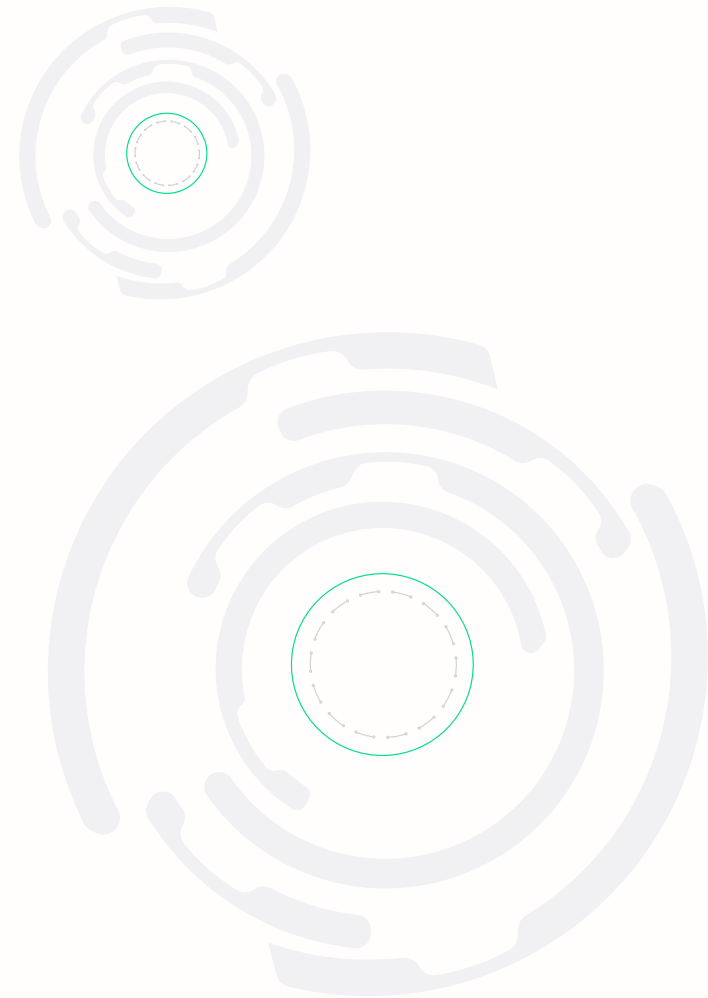
While there's an understanding of the benefits automation can bring **at the organizational level**, there are several obstacles to overcome. One common challenge is a lack of awareness regarding available automation solutions and opportunities.

There's uncertainty as to whether automating certain processes is feasible; which could be due to factors such as the complexity of the tasks involved, the level of customization required, the availability of suitable automation tools or technologies, and potential challenges in integrating automation into existing systems or workflows.

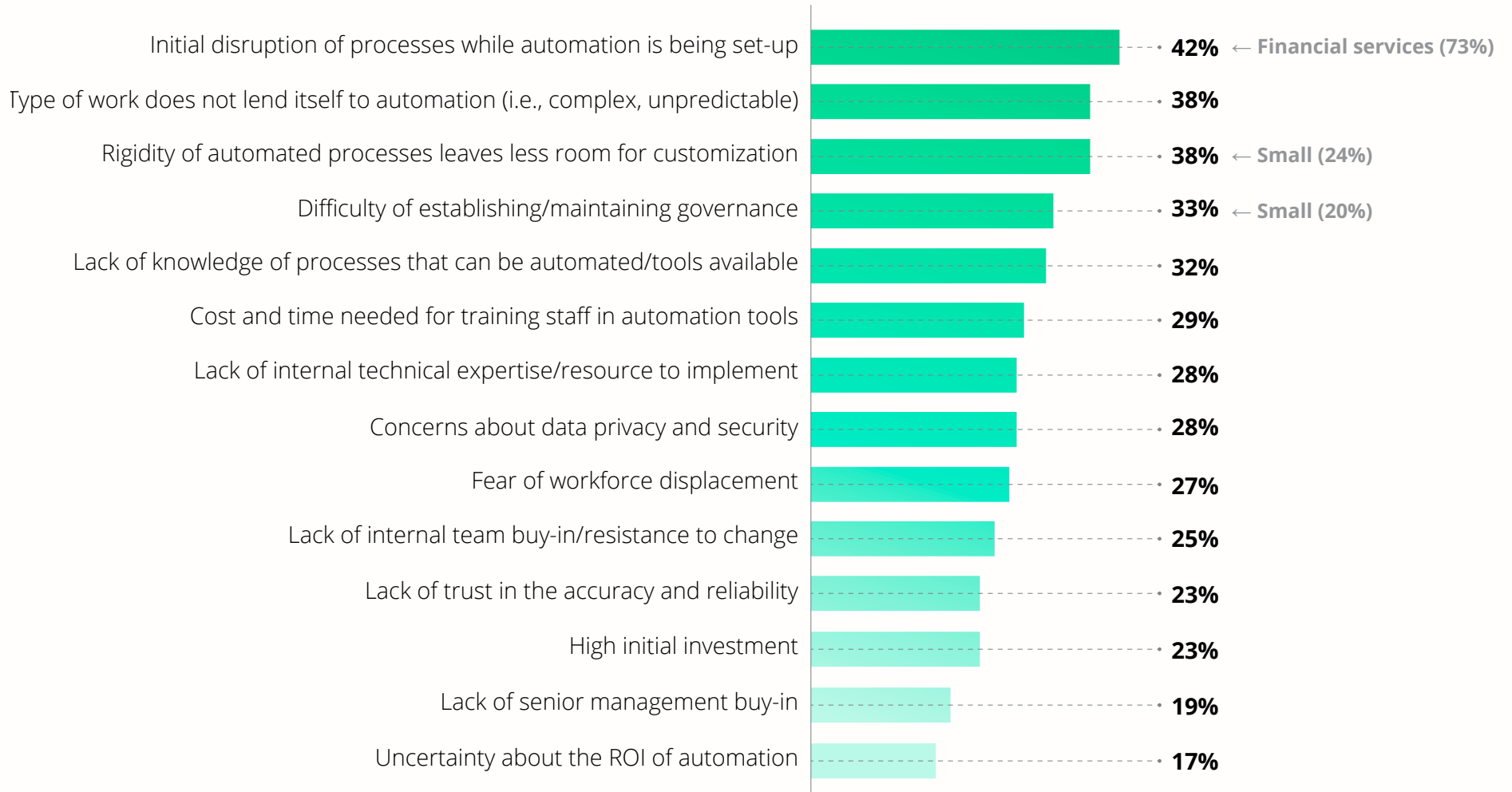
Additionally, concerns about data privacy, regulatory compliance, and the potential impact on job roles and responsibilities may contribute to the uncertainty.

On the other hand, a number of IT leaders face challenges when trying to **maintain effective governance** over their automation initiatives.

And finally, **uncertainty about ROI** doesn't seem to be stopping organizations from realizing the benefits of automation.



# Factors holding teams back



Source: Q15.

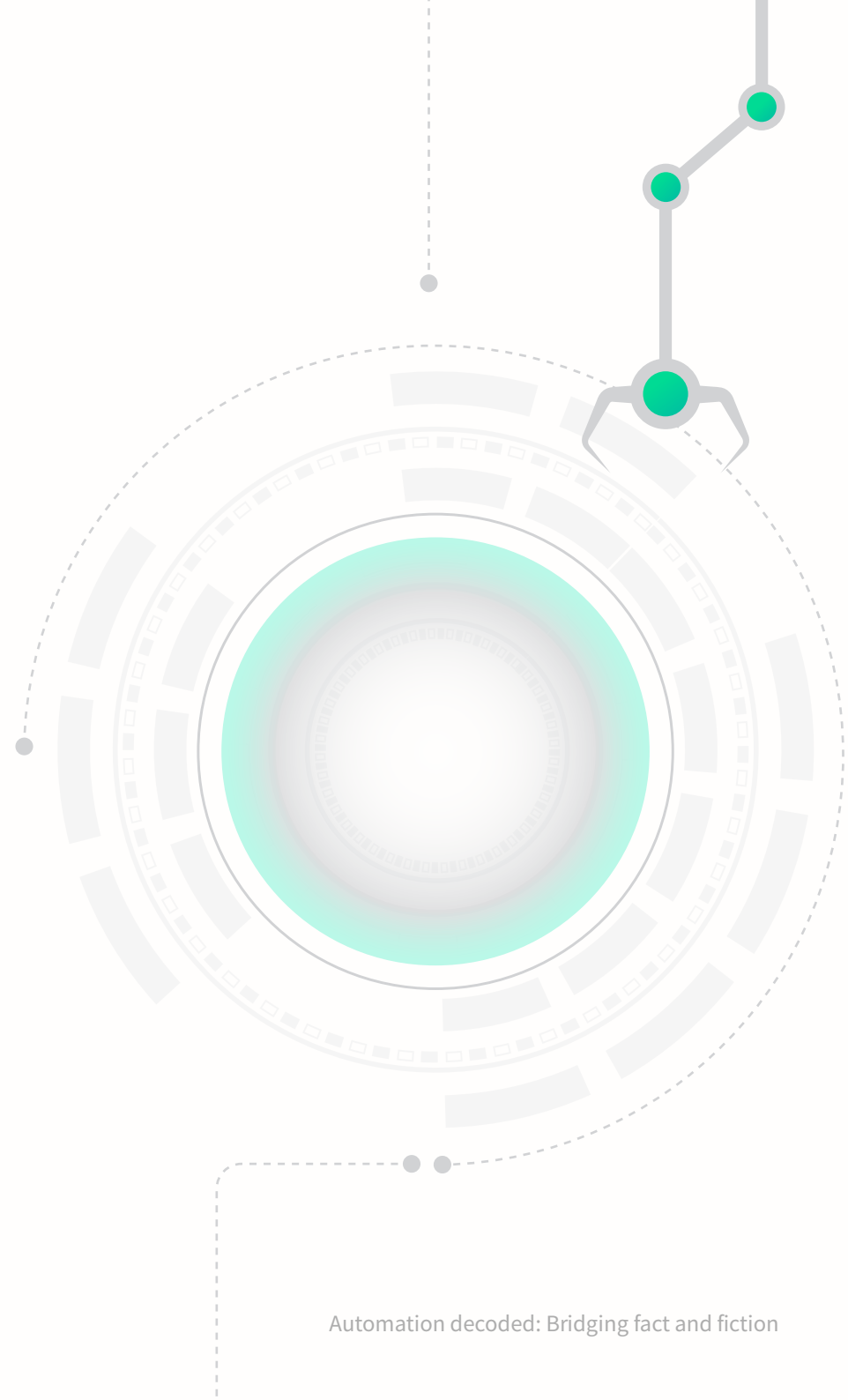
○ The expectation

**At the business function level**, a significant barrier to automation adoption is initial disruption (42%). Each business function within an organization may have its own unique workflows, tasks, and requirements; which can pose challenges when integrating automation into their processes.

This is particularly concerning for the **financial services sector** (73%) given the nature of the work. It can involve intricate workflows, stringent regulatory requirements, complex interdependencies with various systems and departments, risk management considerations, as well as skills to effectively implement and utilize automation tools.

Interestingly, **smaller companies** face fewer challenges related to process rigidity (24%), as well as establishing and maintaining governance (20%).

Similarly to the previous section, **uncertainty about ROI** doesn't appear to be holding back teams from realizing the benefits of automation.



# Top barriers holding teams back



Source: Q7 and Q15.

○ The expectation

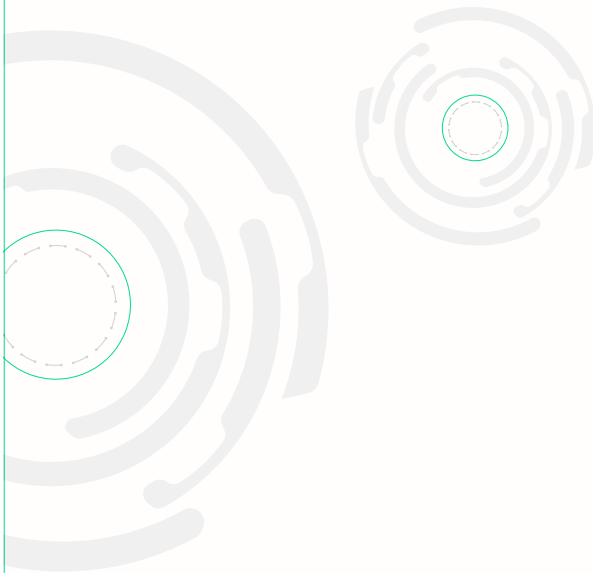
The top three barriers (technically six) for IT support, operations, and security (the functions with the highest automation levels) are:

- 1) Concerns about data privacy and security
- 2 & 3) equally: Fear of workforce displacement and high initial investment
- 4, 5 & 6) equally: Initial disruption of processes, lack of senior management buy-in, and a lack of trust in accuracy and reliability

**While disruption is a common concern across functions, the IT and software departments have specific worries regarding privacy, the significant initial investment, and the buy-in from senior management.** They stand out as having higher levels of adoption compared to other functions.

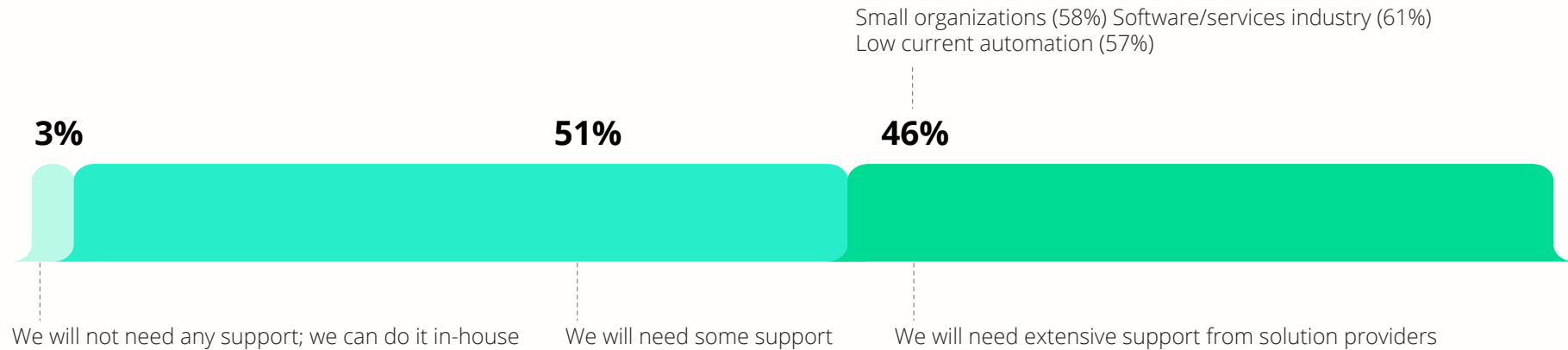
Apart from IT and software, most business functions share similar concerns and challenges such as initial process disruption, limited customization due to rigid automated processes, and work that is not easily automated.

It's worth noting that the perception of what holds "us" back (at a business function level) is different from what holds "them" back (at the organizational level). Security, for example, is a 40% impediment at the organizational level vs. 28% at the business function level.





# Organizations will require support



Source: Q16.

**It is clear that organizations require support in order to successfully implement automation.** Nearly all participants have expressed the need for some form of support in automating their processes. Only a small number of organizations (3%) mentioned that they don't require any support in this regard.

Almost half of the respondents (46%), particularly those from smaller organizations (58%), those with low maturity (57%), or those in the software/services industry (61%), expressed a strong need for extensive support from solution partners.

Implementing and managing automation processes independently, particularly for organizations with low current automation levels, can be challenging. In such cases, partnering with a solution provider offers a simpler path, providing immediate and significant automation improvements along with tailored expert training.

**Business functions with more advanced levels of automation are able to better see the benefits of automation. The data shows two impacts to this:**

**1.**

**They're more likely to invest in future automation.**

**2.**

**They don't worry as much about potential disruption or suitability of automation; their barriers are more related to security and investment.**

## To summarize:

1. 64% of respondents have reported experiencing **increased productivity and efficiency due to automation**.
2. The majority of those who expected increased productivity have seen it realized (78%). However, other **anticipated benefits have been less frequently observed**. For instance, only 40% of those expecting to become more competitive have actually witnessed this outcome, and only 34% of those expecting increased compliance have seen it materialize.
3. On average, respondents indicate that 23% of their **employees' time has been freed up** through the automation of day-to-day processes. However, (30%) have not observed any time savings.
4. **At the organizational level, two main barriers to automation** are the lack of knowledge regarding processes that can be automated or the tools available (50%), and the perception that certain types of work are not suitable for automation (50%). A mere 15% find uncertainty around ROI to be a barrier.
5. **At the business function level, common barriers** include initial disruption of processes (42%), unsuitability of work for automation (38%), and rigid processes limiting customization (38%). As for IT and software functions (which are generally more automated), barriers revolve around privacy/security and the significant initial investment.
6. 46% anticipate needing **extensive support to implement automation**, with small organizations requiring more of that support (58%).

# ○ Key findings

Through an exploration of the promises, realities, and expectations surrounding automation, we've gained profound insights.

# #1

**The promise of workflow automation is clear to businesses – greater productivity, greater accuracy, costs savings, and the ability to scale.**

- Most feel that automation will help them scale and achieve their goals, and have therefore made it a strategic priority.
- Companies appreciate that without continued automation, they will be put at a disadvantage, and lose efficiency and accuracy in their work.
- Many organizations are expecting to increase their level of automation in the next six months.



# #2

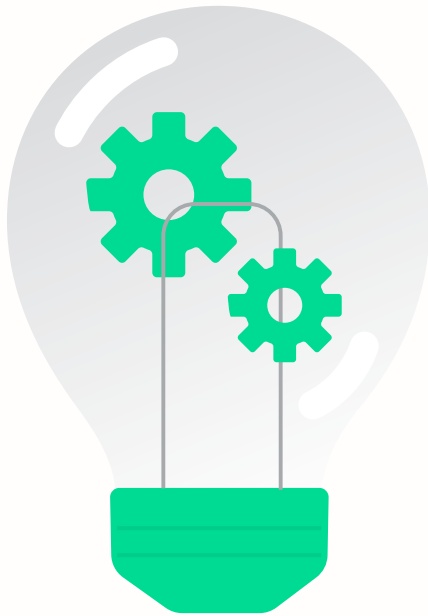
**The degree to which automation is implemented varies across industries and business units, and some perceived barriers remain toward adoption.**



- Automation is most prevalent in IT, software, and finance departments, while the major use cases — which have proven to be impactful — are IT support and service, as well as accounts payable and receivable.
- As it stands, the gap is going to widen - those with the highest automation are also most likely to further automate.
- There are missed opportunities when it comes to automating processes in customer service, product and project management, as well as marketing.

# #3

**Companies that have implemented automation aren't always seeing the promised benefits in reality, yet.**



- Increased productivity and efficiency is the main benefit realized through automation; most who expected this benefit saw it realized — as opposed to becoming more competitive or compliant, which has yet to materialize.
- At an organizational level, the lack of knowledge, and unsuitable use cases, are stopping some organizations from fully realizing the benefits of automation.
- More advanced business functions like IT and software are better able to see the benefits from automation. While they're more likely to invest in future automation, their barriers to adoption are mostly connected to security and investment.

# In conclusion



“

***“Automation is like brand awareness, it sets the stage for success. While the results may not materialize overnight, it’s a journey that paves the way for long-lasting rewards.”***

— Amelie Winkler **Product Marketing Manager - Workflow & Automation at Appfire**

The promise of automation is enticing, offering improved efficiency, cost reduction, and scalability. It empowers companies to reshape their operations and thrive in the ever-evolving business landscape.

However, the reality is that automation requires a comprehensive and iterative approach. Strategic analysis, meticulous planning, collaborative efforts, and a significant culture shift across the organization, are essential to unlocking its full potential. Automation is a journey of continuous adaptation and refinement.

Patience is key when it comes to automation. Adopting automation requires a long-term perspective and the willingness to evolve alongside it. Success does not happen overnight but comes through a persistent effort, and embracing new opportunities as they arise.

In this pursuit, automation becomes the cornerstone of competitiveness and relevance. It is no longer a luxury, but a necessary tool for businesses to stay ahead. By welcoming automation and patiently embracing its transformative power, organizations can unlock new horizons and assert their leadership in an increasingly automated world.

Whether you're just starting your automation journey or seeking to enhance existing initiatives, our ten-step guide below provides valuable insights and practical steps to accelerate your automation efforts.

Wishing you continued success in your automation endeavors!

# 10 steps to initiate process automation

**1**

### Identify automation opportunities

Identify repetitive, time-consuming, and rule-based processes suitable for automation. Look for opportunities to integrate platforms and systems, and foster collaboration across teams and departments. Then analyze the pros and cons of doing things in-house, vs. getting help from a [partner](#), or finding your own [custom solution of apps](#).

**2**

### Set clear objectives

Define the specific outcomes you want to achieve through automation, such as improving efficiency, reducing errors, or freeing up employee time.

**3**

### Conduct a process audit

Analyze identified processes (in detail) to understand your current workflows, dependencies, and pain points — so you can determine how to apply automation.

**4**

### Research automation solutions

Explore the world of automation tools, software, and technologies available while considering factors like ease of implementation, scalability, and compatibility with existing systems.

**5**

### **Start with pilot projects**

Begin with a small-scale automation project to test your chosen solution, so you can learn, refine the process, and get buy-in from stakeholders.

**6**

### **Develop an implementation plan**

Create a roadmap with steps, a timeline, and resources required for your automation deployment. Consider necessary training or support for employees involved.

**7**

### **Collaborate with stakeholders**

Involve relevant team members and departments throughout the automation process. Seek their input, address concerns, and ensure a smooth transition.

**8**

### **Monitor and evaluate**

Continuously monitor the automated processes and track KPIs. Evaluate the impact of automation on efficiency, accuracy, and overall business outcomes.

**9**

### **Iterate and expand**

Based on the initial results and feedback, make adjustments and improvements if needed. Gradually expand automation to other processes, leveraging the lessons learned.

**10**

### **Foster a culture of automation**

Encourage a mindset of continuous improvement and innovation within the company. Promote awareness of automation benefits, and actively seek new opportunities.



# Question origins

IT leaders were asked a plethora of questions — some of which were designed to screen and create context. We're including the relevant ones, only.

**Q1.** To what extent do you agree or disagree with the following statements?

**Q2.** How many people does your organization employ globally?

**Q3.** What proportion of your day-to-day processes are automated through the adoption of software?

**Q4.** In your opinion, which of the following are the primary benefits of implementing automation within an organization?

**Q5:** And what do you see as the implications of not delivering on these priorities/opportunities?

**Q6.** You mentioned earlier that a % of your day-to-day processes has been automated through software adoption. Does your company plan to increase or decrease its level of automation in the next 6 months?

**Q7.** To what extent have the following business functions at your organization automated day-to-day processes through software/tools?

**Q8.** How do you expect the level of automation in these business functions to change over the next 12 months?

**Q9.** Which of the following automation use cases have you already implemented?

**Q10.** Which specific automation use cases are most impactful within your business?

**Q11.** You mentioned the below use cases have been most impactful in your organization. Why is this?

**Q12.** Which of these benefits has your organization actually experienced as a result of automation?

**Q13:** You mentioned that automation has led to improved productivity. On average, what % of individuals' time has been freed up by automation of day-to-day processes?

**Q14.** You mentioned that you're not fully unlocking these potential benefits. What is stopping you?

**Q15.** You mentioned that certain business functions have low or no adoption of automation within your organization. What factors are holding this/these team(s) back from further adoption?

**Q16:** How much support do you think you will need from solution providers/consultants to implement automation of these processes?



# About the authors



Isos Technology accelerates the innovation curve for companies that are changing the world. Since 2005, we've partnered with hundreds of organizations to help them tackle tough business challenges and achieve their strategic goals. Isos recently became a portfolio company of The Acacia Group, joining forces with HyperVelocity and the Atlassian practice of MajorKey Technologies to form one of the largest Platinum Solution Partners in the Atlassian ecosystem.

As an Atlassian Platinum Solution Partner with ITSM, Cloud, and Agile at Scale specializations, Isos helps organizations optimize their technology tools, develop effective practices, and guide people toward agility and resilience. Headquartered in Tempe, Arizona, and with offices across the U.S., Isos has been recognized as an Atlassian Partner of the Year in the ITSM and Enterprise categories for the last five years, an Inc. 5000 Fastest-Growing Private Company, and a CIOReview Most Promising Agile Consulting Company. For more information, visit [isostech.com](http://isostech.com).



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