



Enterprise RPA Adoption | Pinnacle Model[™] Assessment Overview

March 2018

Pinnacle Model™ research methodology

Definition of Pinnacle Enterprises™

Everest Group Pinnacle Model™ assessments identify Pinnacle Enterprises™, companies that are achieving superior business outcomes because of their advanced capabilities. The journeys of these best-of-the-best companies provide insights into the key enablers needed to achieve desired outcomes and point to the investments required for the greatest speed to impact. Whether companies are wanting to make incremental changes or achieve major transformations, Pinnacle Enterprises exemplify the way to success.



Define the topic

We evaluate multiple topics to identify hot topics that will resonate globally with sourcing leaders. We work with internal and external SMEs to define the topic and set boundaries



Survey enterprises

We use surveys, RFIs, and other data collection methods to gather information from enterprises on capabilities and outcomes associated with the topic under evaluation



Interview participants

We then conduct interviews/roundtables with a subset of participants to gain deeper perspectives on their experiences, challenges, and journeys



Form hypotheses

We form an emerging point of view on the correlations between capabilities and outcomes, adoption trends, and key success factors



Validate and refine

A cross-section of SMEs from various practices debates and refines the emerging hypotheses



Publish and educate

We compile and share final results with participants, our members, and other stakeholders in the global services sector. Participants also receive a high-level customized analysis



In the current Pinnacle Model™ assessment, we look at enterprise **Robotic Process Automation (RPA)** adoption patterns to compare outcomes with associated capabilities



Pinnacle Enterprise™ differentiators



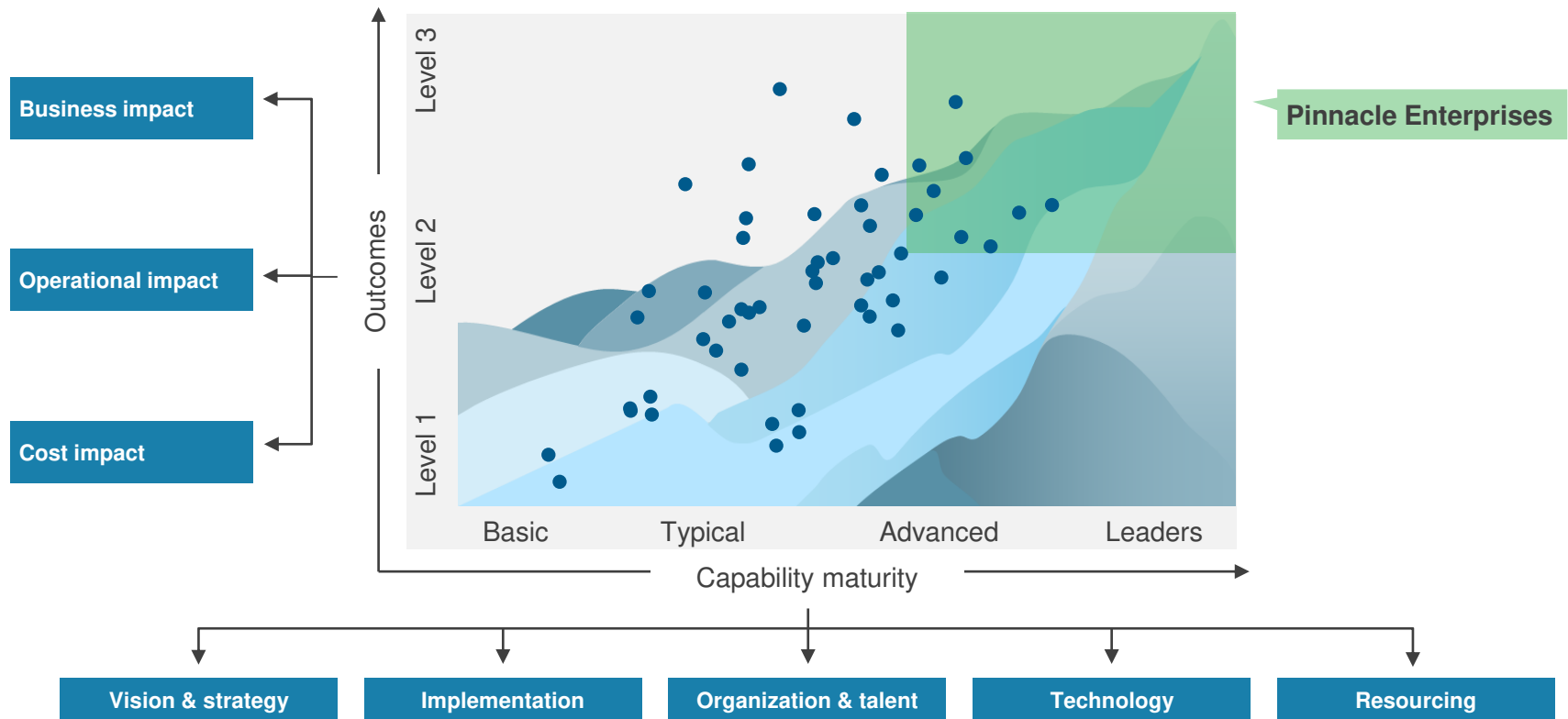
Accelerating your RPA journey



Implications for enterprises

We identified RPA Pinnacle Enterprises™ based on their focus on outcomes and capability maturity

Everest Group recently assessed Enterprise RPA adoption on the Pinnacle Model™ based on a study with 52 enterprises



Source: Everest Group's RPA Pinnacle Model™ Assessment (2018)

Pinnacle Enterprises™ significantly exceed other enterprises in three key impact areas

All enterprises have gained maximum impact from RPA in operational areas

Enterprise RPA impact comparison

Cost impact



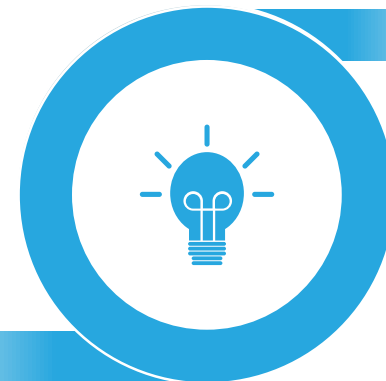
Pinnacle Enterprises generated **4X RoI** and created **3X the resource capacity**, compared to other enterprises

Operational impact



Pinnacle Enterprises, on average, have achieved **50% improvement** in operational metrics, compared to **30%** by other enterprises

Business impact



A significantly higher share of Pinnacle Enterprises have generated **“high impact”** in strategic areas (e.g., customer experience and time-to-market)

Source: Everest Group's RPA Pinnacle Model™ Assessment (2018)

Pinnacle Enterprises™ have developed differentiated capabilities across the organization

Enterprise RPA capability maturity comparison

Vision & strategy

Better organizational preparedness; RPA is viewed as a contributor to digital strategy, instead of a tactical measure



Technology

Focus on reusability (shared libraries) and adoption of **next-generation automation technologies**



Implementation

Significantly wider scope (**5X number of bots**) and higher speed of implementation (**3X faster**) and scaling up (**25% faster**)



Resourcing

Higher leverage of third-party vendors/service provider resources for training, implementation, and ongoing support & maintenance activities

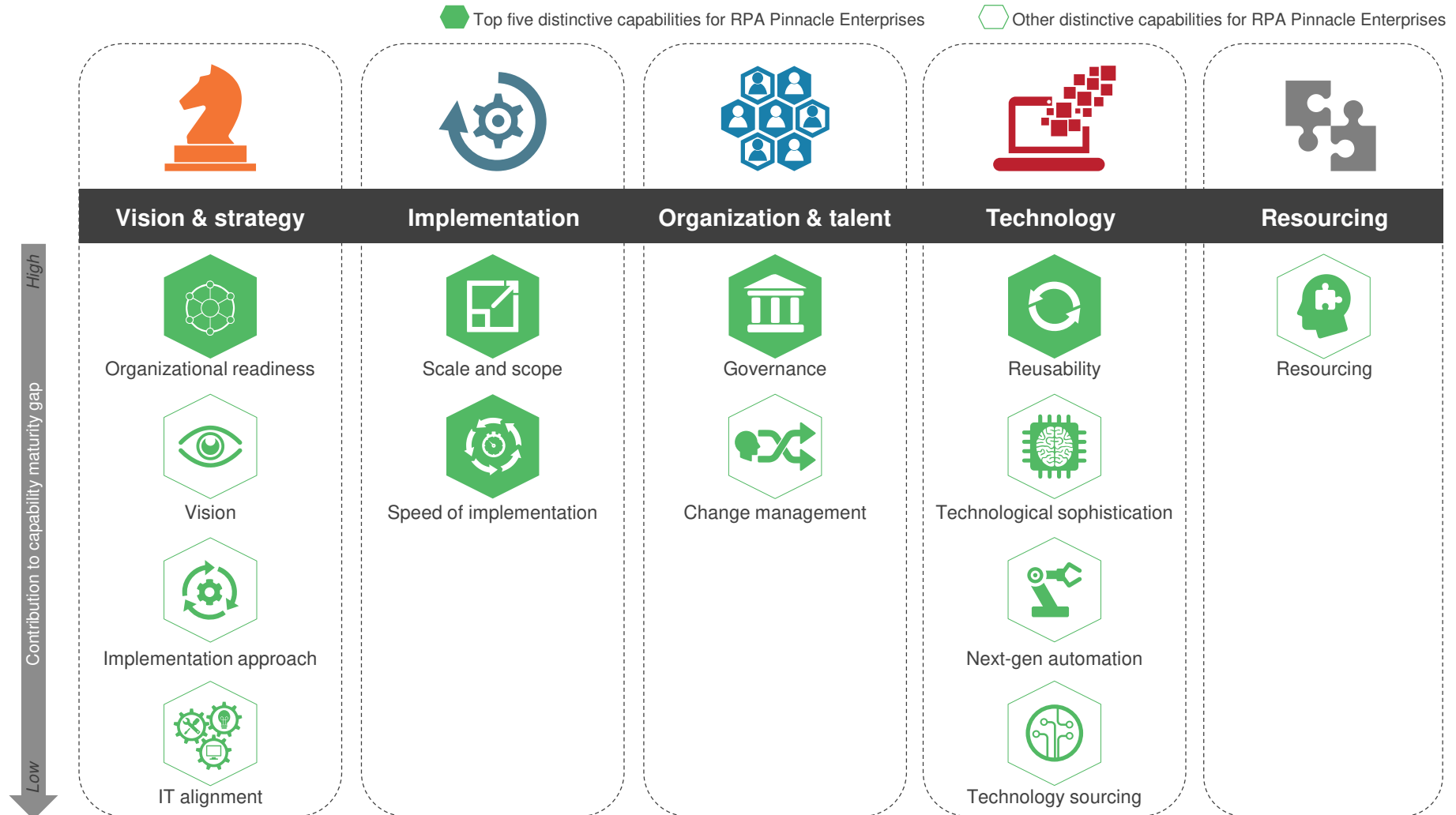


Organization & talent

Higher collaboration among BUs, adoption of RPA CoEs, and upskilling/reskilling of impacted resources

Source: Everest Group's RPA Pinnacle Model™ Assessment (2018)

RPA Pinnacle Enterprises™ achieve high impact with differentiated capabilities: organizational readiness, governance, reusability, and scale & speed of implementation



Source: Everest Group's RPA Pinnacle Model™ Assessment (2018)

One of six implications for enterprises

Improved operational effectiveness and enhanced employee and customer experience are key drivers of RPA adoption



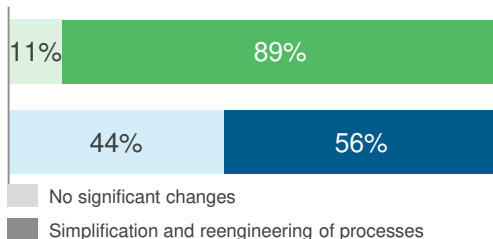
- Automation needs to be viewed as the next big enabler of operational improvement, which will result in both employee and customer experience enhancement
- Financial benefit – both top line and bottom line growth – will follow as the above objectives are achieved
- Pinnacle Enterprises' more holistic approach allows them to see both higher chances of success and ROI

Source: Everest Group's RPA Pinnacle Model™ Assessment (2018)

Other key snippets from the 2018 RPA Pinnacle Model™ Assessment

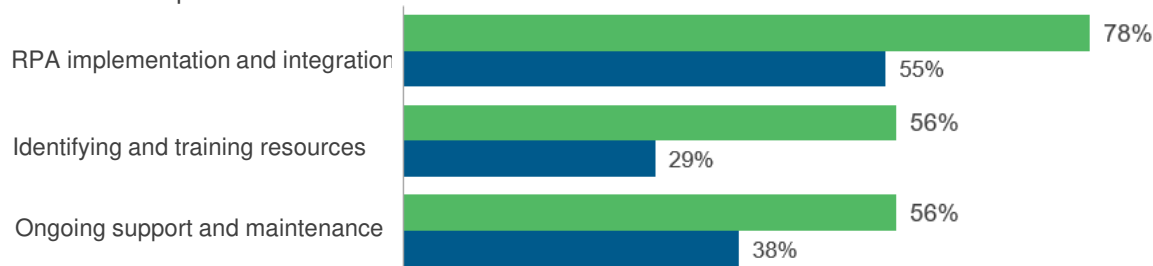
■ Pinnacle Enterprises
 ■ Other enterprises

Changes made to business processes for RPA adoption (share of enterprises)



Role of third-party system integrators / service providers in RPA initiative¹

Number of respondents



Primary philosophy behind adopting RPA



Key components of organization's broader digital strategy



As a means to make some processes more efficient

Enterprise Challenges for RPA adoption (level of difficult ranges from 1 [least] to 5 [most])

- Lack of internal skills and knowledge (3.8)
- Broken processes (3.4)
- Concerns from IT teams (3.2)
- Cultural resistance to change (3.1)
- Organizational structure (2.8)
- **Complete list of challenges in full assessment**

Three key points of interest among Pinnacle Enterprises in RPA adoption trends

- Empowerment at the grass-roots level is the key to accelerate RPA adoption, in addition to the top-down RPA initiatives
- Pinnacle Enterprises™ significantly exceed other enterprises in achieving positive impact on strategic objectives from RPA implementation
- About half of all Pinnacle Enterprises™ have achieved more than 100% ROI from their RPA investments, whereas 44% of other enterprises are yet to achieve any ROI

¹ Numbers do not total 100% as respondents have leveraged third-party providers across different stages of RPA initiatives

Source: Everest Group's RPA Pinnacle Model™ Assessment (2018)

Learn more insights from our RPA Pinnacle Model™ Assessment

Additional topics covered in our report (85+ pages)

- Differentiators for Pinnacle Enterprises™
 - Business outcome differentiators
 - Capability differentiators
- Pinnacle case study – Leading information services company derives upwards of 10X productivity increase through a harmonized adoption of lean and automation
- Key implications for enterprises
- Accelerating your RPA journey
- Assessment of capability maturity
 - Vision and strategy
 - Implementation
 - Organization and talent
 - Technology
 - Resourcing
- Assessment of impact created
 - Cost impact
 - Operational impact
 - Strategic impact



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About Everest Group

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