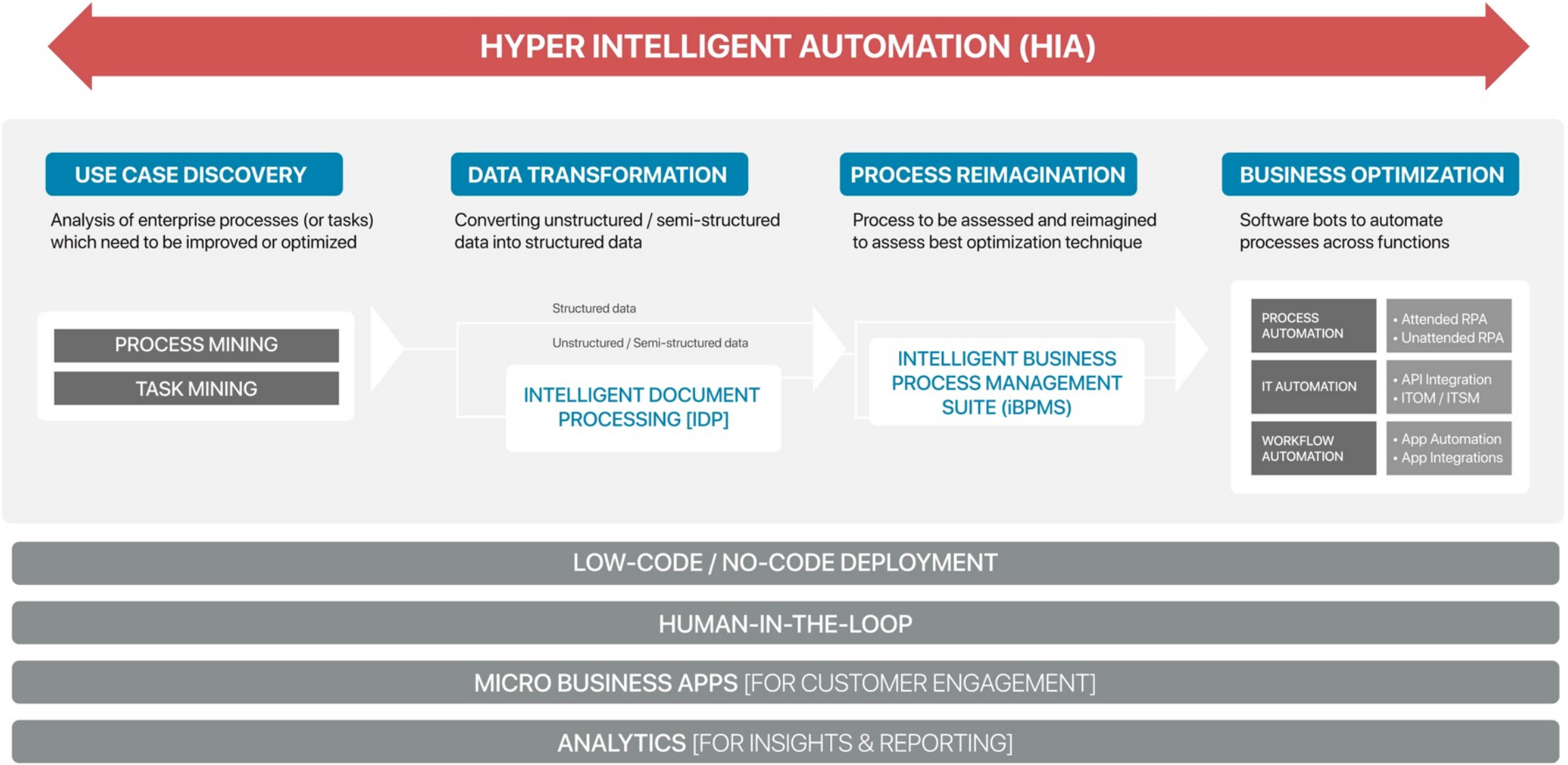
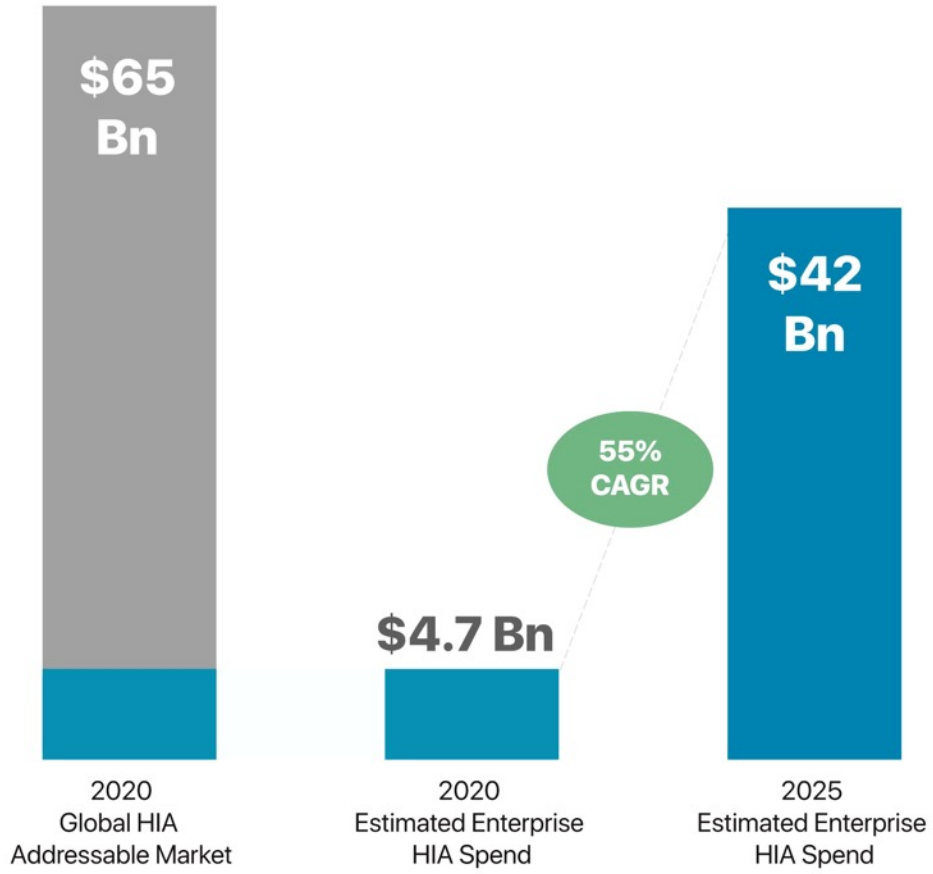
UiPath™
zinnov
HYPER INTELLIGENT AUTOMATION – 2020
LANDSCAPE REPORT |
TRENDS AND MARKET ANALYSIS

# Hyper Intelligent Automation – the New Face of Automation

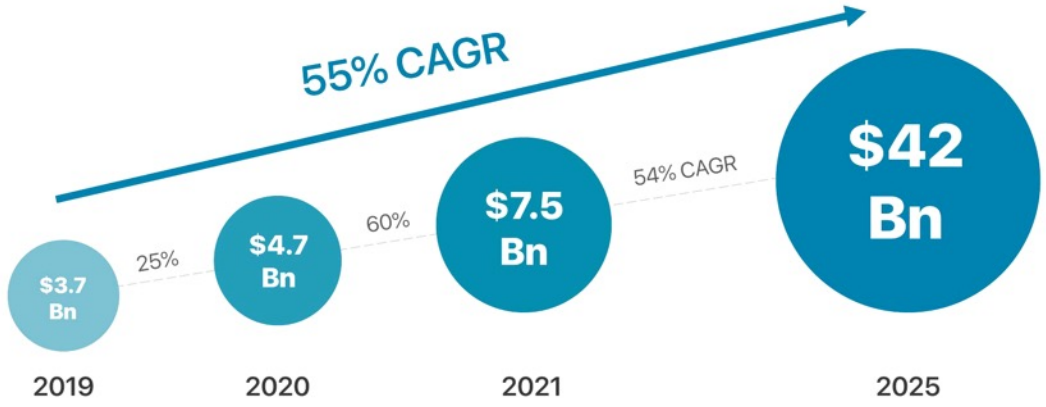


# Massive 55% CAGR growth till 2025, despite COVID-19 setback

## GLOBAL HIA MARKET SIZE (CY 2020-25)




## IMPACT OF COVID-19 ON HIA MARKET




**COVID-19 to Impact HIA Spend**

Impact on adoption in Q2/Q3 of 2020 due to focus on cost optimization

Gradual uptake expected in Q4 for business continuity

**Rapid Uptake for Pandemic-proofing**

Surge in adoption as automation becomes part of "New Normal" work conditions and pandemic-proofing the future

**Sustained growth in Automation / HIA**

Rise in adoption of Use Case Discovery and IDP

HIA uptake across more complex use cases and IT automation

Notes: 1) All figures in the market size estimates pertain to Calendar Years (CY); 2) HIA market size estimates based on a total of Use Case Discovery (Task Mining & Process Mining), IDP, RPA & Intelligent Automation; 3) Market size estimates based on analysis of the revenue of leading HIA platforms; 4) Enterprise Spend defined as spend on proprietary HIA platforms, HIA assets developed in-house, and related in-house and outsourced HIA services, including bot configuration, management, deployment, support, and training
Source: Zinnov Research and Analysis

# Rise of Automation as an effective tool to battle COVID-19

## 50+ Automation Use Cases to help enterprises battle COVID-19

### UNIQUE ADVANTAGES OFFERED BY RPA

**AGILE IMPLEMENTATION**

RPA deployments being completed within 48-72 hours through Attended Automation and web-based Cloud-native solutions

**SEAMLESS INTEGRATION**

- Minimal system requirements
- Integration with legacy applications

**REMOTE DEPLOYMENT**

- Rapid Cloud-based deployments
- 20% of all RPA deployments will be Cloud-based (up from less than 10% in 2019)

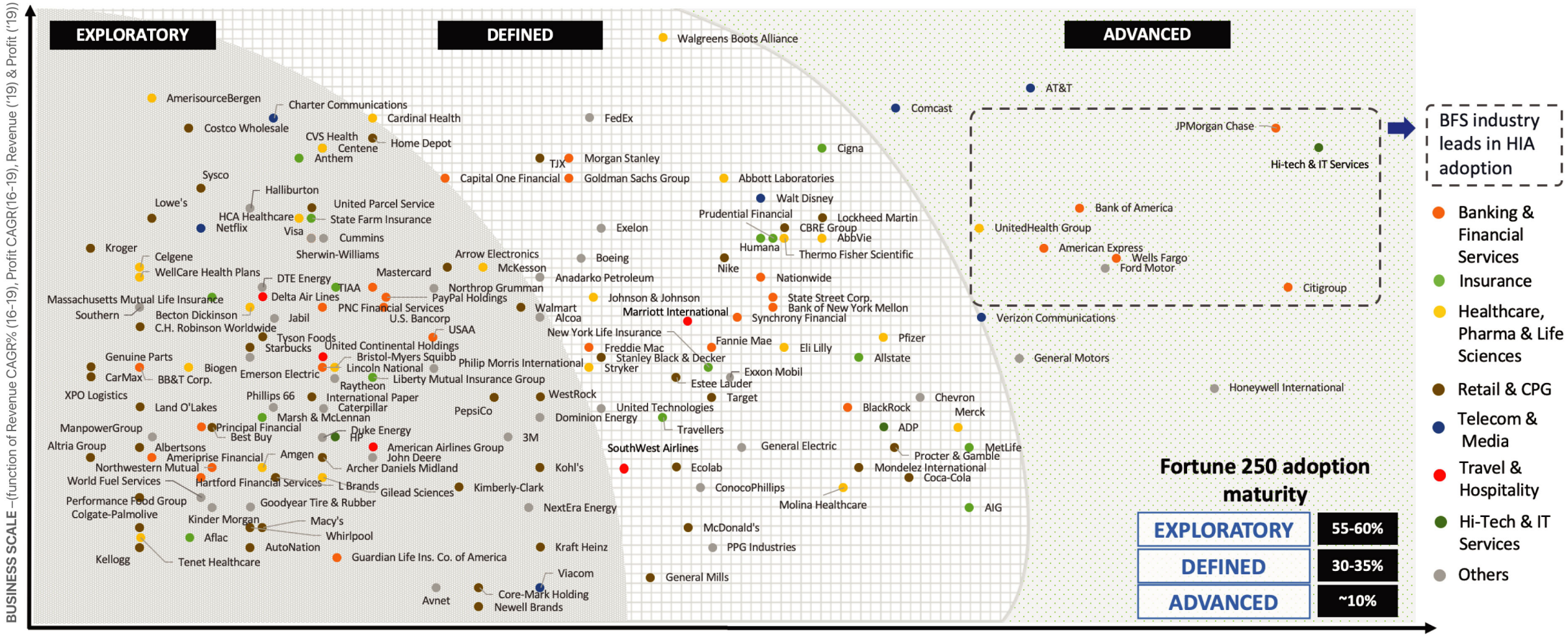
**UNPARALLELED SCALABILITY**

- A bot can handle several processes and manage the work of 8-10 employees
- If pandemic exacerbates, bots can take on additional load

# Fortune 250 Enterprises are on an accelerated journey to adopt HIA

## FORTUNE 250 HIA MATURITY MAP

**75% Fortune 250 Enterprises have initiated their HIA journeys**




Note: 1) Top 250 firms have been analyzed from the 2019 Fortune 500 list; 2) Hi-Tech & IT Services include enterprises such as Microsoft, Accenture, Cognizant, etc., which may be using HIA for internal operations as well as external clients

# Automation Scope extending beyond tackling Mainframe-related Challenges

| | BANKING & FINANCIAL SERVICES | INSURANCE (PROVIDERS & BROKERAGE) | HEALTHCARE[1], Pharma & Life Sciences | RETAIL & CPG | TELECOM (Services & Equipment) & MEDIA | TRAVEL & HOSPITALITY | PUBLIC SECTOR[2] |
|---|---|---|---|---|---|---|---|
| Share in HIA spend | 25-27% | 15-18% | 14-16% | 10-12% | 8-10% | 7-9% | 7-9% |
| COVID impact on HIA adoption | | | | | | | |
| | Account Opening & KYC | Claims Management | RCM | Vendor Management | Network Diagnostics | Schedule Management | Program Management |
| | Fraud Detection & AML | Policy Issuance & Updates | Pharmacovigilance | In-store Planning | Network Planning | Ticketing / Booking | Citizen Services |
| | Loan Processing | Underwriting Management | Clinical Data Management | Trade Promotions | Contact Centers | Cancellations / Refunds | Compliance Management |
| | Transaction Processing | Notice of First Loss | Patient Record Management | Sales Analytics | Content Management | Demand Planning | Vendor Management |
| | Automated processes within Treasury Management and Transaction Processing<br><br>150% reduction in FTE hours involved | 150+ bots across IT processes such as Server Monitoring and Database Updates<br><br>70% of repetitive IT tasks automated | RPA within F&A and HR including Transaction Processing and Employee Onboarding<br><br>50%+ reduction in processing time | Deployed bots across HR processes such as Applicant Screening and Employee Onboarding<br><br>1000%+ improvement in processing time | 1,000+ bots deployed across processes such as tracking tickets, generating invoices, etc.<br><br>More than 50% admin processes automated | Automated F&A processes such as Invoice Processing and Claims Management<br><br>90%+ accuracy achieved | Adopted an automated unified complaint entry system to manage the case lifecycle<br><br>$5 Mn saved across 18 use cases |

Share in HIA spend xx%

COVID impact on HIA adoption: LOW — MEDIUM — HIGH

Note: 1) Healthcare includes Healthcare providers and Medical Device manufacturers; 2) Public Sector includes Defence Manufacturers; 3) Others including Automotive, Industrials, and Oil & Gas contribute 5-7% of HIA spend

# Automation aiding Healthcare in front-line response to COVID-19

## AUTOMATION USE CASES FOR HEALTHCARE

### TESTING & DIAGNOSIS

- ACCELERATE COVID-19 TESTING & REDUCE WAIT TIMES
- ACCELERATE PATIENT DIAGNOSIS FOR COVID-19
- ACCELERATE RADIOLOGY RESULTS FOR COVID-19
- SCHEDULING REMOTE PATIENT CONSULTATIONS 24/7

### TREATMENT & CURE

- ACCELERATE COVID-19 VACCINE DEVELOPMENT
- RAPID DETECTION OF COVID-19 PATIENTS

### RECOVERY & MONITORING

- HEALTH SCREENING BOTS FOR MONITORING EMPLOYEE HEALTH
- TRACKING COVID-19 UPDATES AND MONITORING RISKS
- MANAGING SAFE RETURN TO NOW COVID-19 FREE AREAS

### BACK-OFFICE / OPERATIONS

- ACCELERATE THE ONBOARDING OF EMERGENCY STAFF
- ORDER FULFILLMENT FOR SURGE IN MEDICAL SUPPLY ORDERS
- CONTACT CENTER SUPPORT TO MANAGE QUERIES
- ACCELERATING PATIENT REGISTRATION
- STREAMLINING HEALTHCARE CLAIMS / VALIDATING MEDICAID

## CASES IN POINT

Cleveland Clinic

### Accelerating Patient Diagnosis

- An attended bot, deployed within 48 hours, takes patient data, checks in the database, registers them, and sends the patient-specific test label to the testing line
- Task completed in 14-16 seconds, while humans took 2-3 minutes

NHS

### Automating COVID-19 Testing

- RPA and IDP being leveraged to extract critical patient information to process COVID-19 cases with speed and accuracy for WHO
- Multiple databases are accessed using RPA to validate patient information and IDP to extract information from forms simultaneously

Maccabi Healthcare Services

### Accelerating Patient Registration

- Bots are helping Maccabi, one of the largest non-profit health maintenance organizations in Israel, by automating the manual uploading of patient details and test results
- Solution deployed within 48 hours

# Other industries leveraging Automation to ensure Business Continuity

## AUTOMATION USE CASES FOR OTHER INDUSTRIES

### BFSI

- REMOTE ACCOUNT OPENING / KYC
- DELAYING LOAN / MORTGAGE / CREDIT CARD PAYMENTS
- COVID-19 CLAIMS ADJUDICATION & PROCESSING
- PAYCHECK PROTECTION PROGRAM

### RETAIL

- HANDLING SURGE IN JOB APPLICATIONS
- ORDER MANAGEMENT FOR SURGE IN ONLINE ORDERS

### PUBLIC SECTOR

- COVID-19 RESPONSE MANAGEMENT FOR SAFETY OF EMPLOYEES
- ORDER FULFILLMENT FOR SURGE IN MEDICAL SUPPLY ORDERS
- IMPROVING ACCESS TO PSYCHOLOGICAL THERAPY
- TRACKING COVID-19 CASES WITHIN PRISONS
- GRANT APPLICATION & UPDATING PROCESS
- ISSUING PERMITS TO ESSENTIAL RETAIL AND DELIVERY EMPLOYEES

### TRAVEL & HOSPITALITY

- SELF MANAGEMENT OF FLIGHT DISRUPTIONS
- CHATBOTS FOR CUSTOMER COMMUNICATION
- DETECTION OF TRAVELERS SUSPECTED OF COVID-19
- CREW SCHEDULING FOR RESTRICTED TRAVEL

CONTACT CENTER SUPPORT TO MANAGE SURGE IN QUERIES / CANCELLATIONS

EMPLOYEE ONBOARDING BOT

HEALTH SCREENING BOTS FOR MONITORING EMPLOYEE HEALTH

BOT-LED TRAINING PROGRAM

## CASES IN POINT

Walmart

**Accelerated Employee Onboarding**

Employee onboarding bots are being leveraged to manage candidate applications as the major retail giant looks to onboard several thousand new employees to meet increasing customer demands

GSA

**Helping Government Track COVID-19 cases**

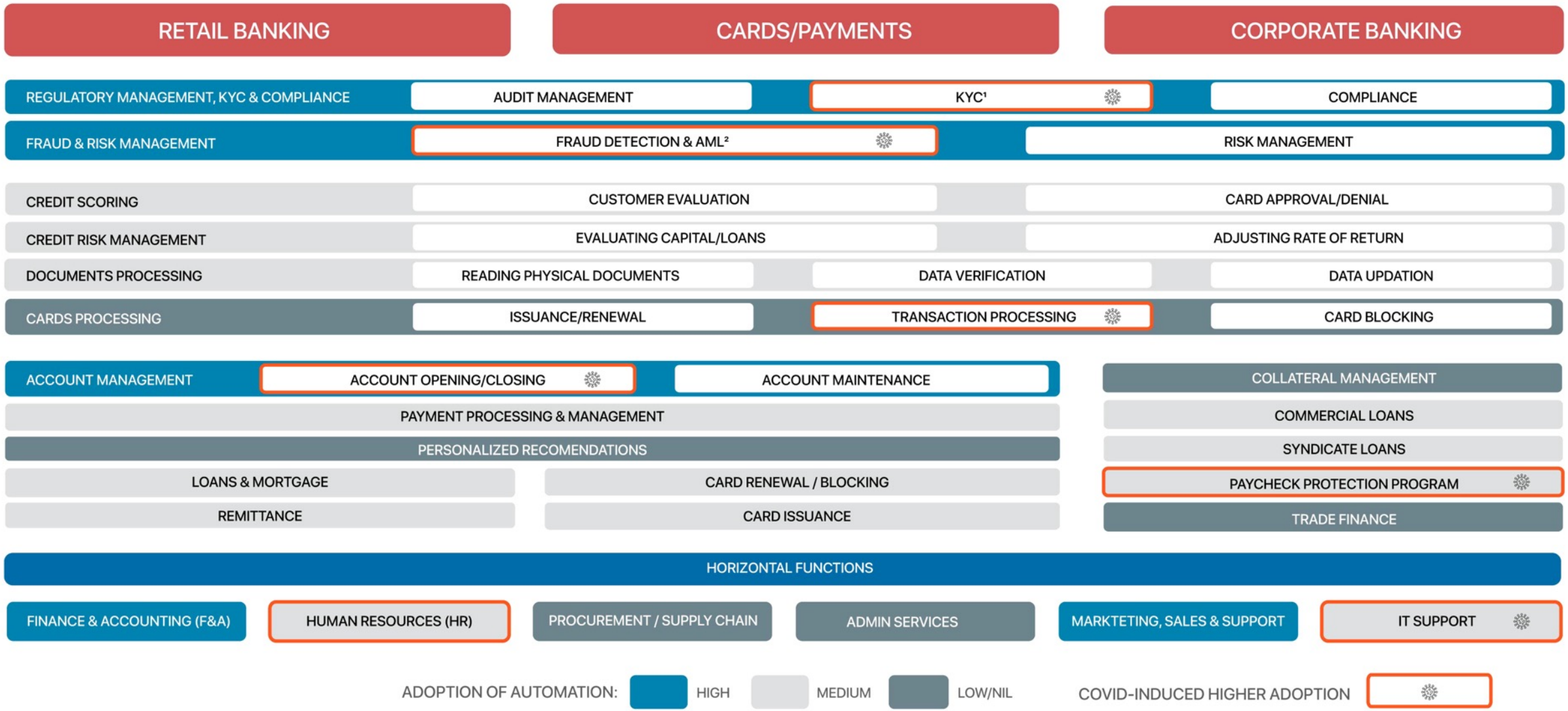
General Services Administration (GSA) is using RPA to log into geographic information systems, collect information about buildings under its management, and match those buildings with infection counts on a county level to show a map of infected government workers

BANCO GUAYAQUIL

**Loan Rescheduling to Avoid Penalties**

- The South American bank rescheduled up to 6 Mn loan records, ensuring late payments would not trigger automatic delinquent credit notices
- Deployed and launched within 5 days, bots took over the rescheduling process for all the loans

# Case in point: Banking Industry Value Chain




Note: 1) KYC – Know Your Customer; 2) AML-Anti Money Laundering Intensity of HIA adoption based on Zinnov Analysis of ~100 Banking-related Automation case studies

# Enterprises increasing focus on other Horizontal Functions besides F&A

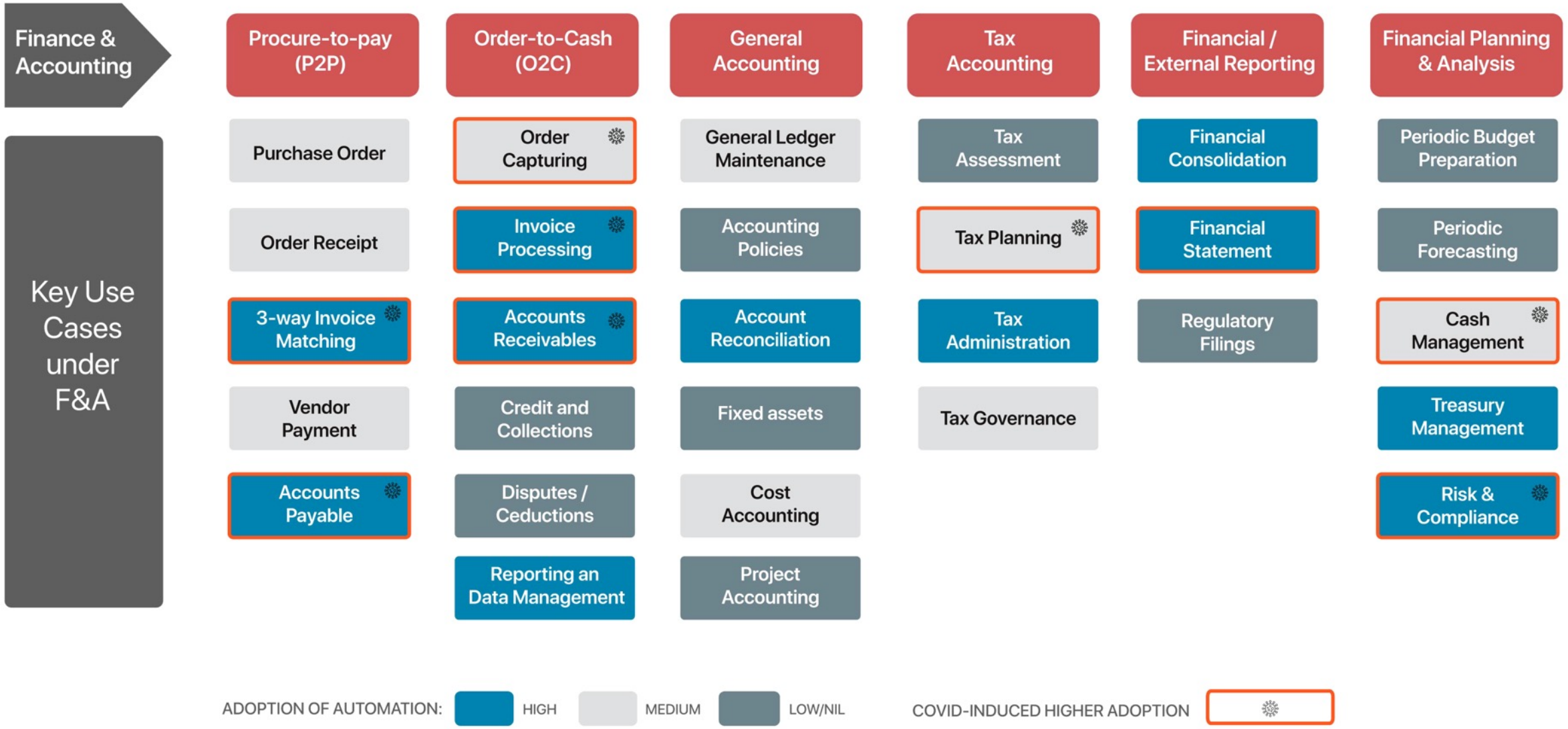
## HIA ADOPTION ACROSS HORIZONTAL FUNCTIONS

| | Finance and Accounting (F&A) | Human Resources (HR) | Marketing, Sales, and Support | IT | Procurement | Admin Services |
|---|---|---|---|---|---|---|
| Share in HIA spend | 40-42% | 20-22% | 15-17% | 8-10% | 7-9% | 6-8% |
| COVID impact on HIA adoption | | | | | | |
| | • Tax Accounting<br>• Accounts Payables / Accounts Receivables<br>• Invoice Processing<br>• Revenue Cycle Management<br>• Transaction Processing | • Employee Onboarding<br>• Employee Background Verification<br>• Payroll & Compensation<br>• Employee Records Management<br>• Timesheet Management | • Contact Centers<br>• Customer Records Management<br>• Telemarketing<br>• Customer Surveys and Feedback<br>• Trade Promotions | • IT Service Desk<br>• Incident Management<br>• Database Updates and Monitoring<br>• Infrastructure Management<br>• Network Management | • Inventory Management<br>• Order Management<br>• Vendor Onboarding and Enablement<br>• Contract Management<br>• Category Management | • Corporate Reporting<br>• Legal Contract Analysis<br>• Transcription / Sentiment Analysis<br>• Patents / IP Management<br>• Office Supplies Management |
| | Deutsche Bank | Morgan Stanley | AMERICAN FIDELITY | McAfee | DHL | MetLife |
| | Automated Transaction Processing of payments related to both card and cash operations | Automation of HR processes such as Employee Performance Assessment and Appraisals | Automated Customer Record Management across internal systems and CRM applications | Automating IT workloads related to Application Testing and Workload Management | Automated several logistics processes across five Global Service Centers. 50% reduction in FTEs involved | Using Automation to generate corporate reports and ensure legal compliance |

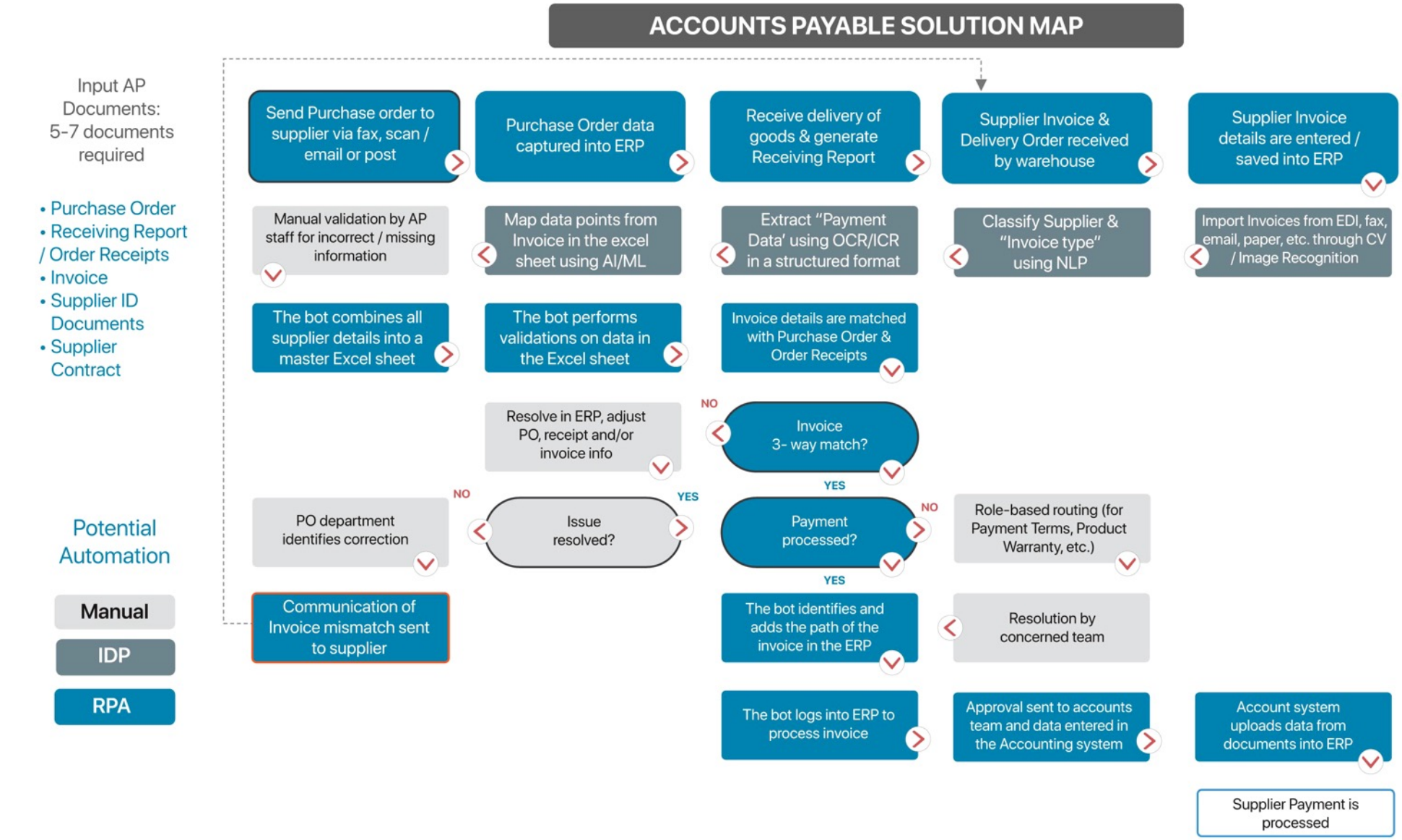
Share in HIA spend xx%

COVID impact on HIA adoption: LOW — MEDIUM — HIGH

# COVID-19 to accelerate HIA Adoption across P2P and O2C processes



# Case in point: Solution Map – Accounts Payable




**80%+** invoices are still paper-based (The Accounts Payable Network)

**20x** higher average cost of manual processing of an invoice vs Automation (IOMA)

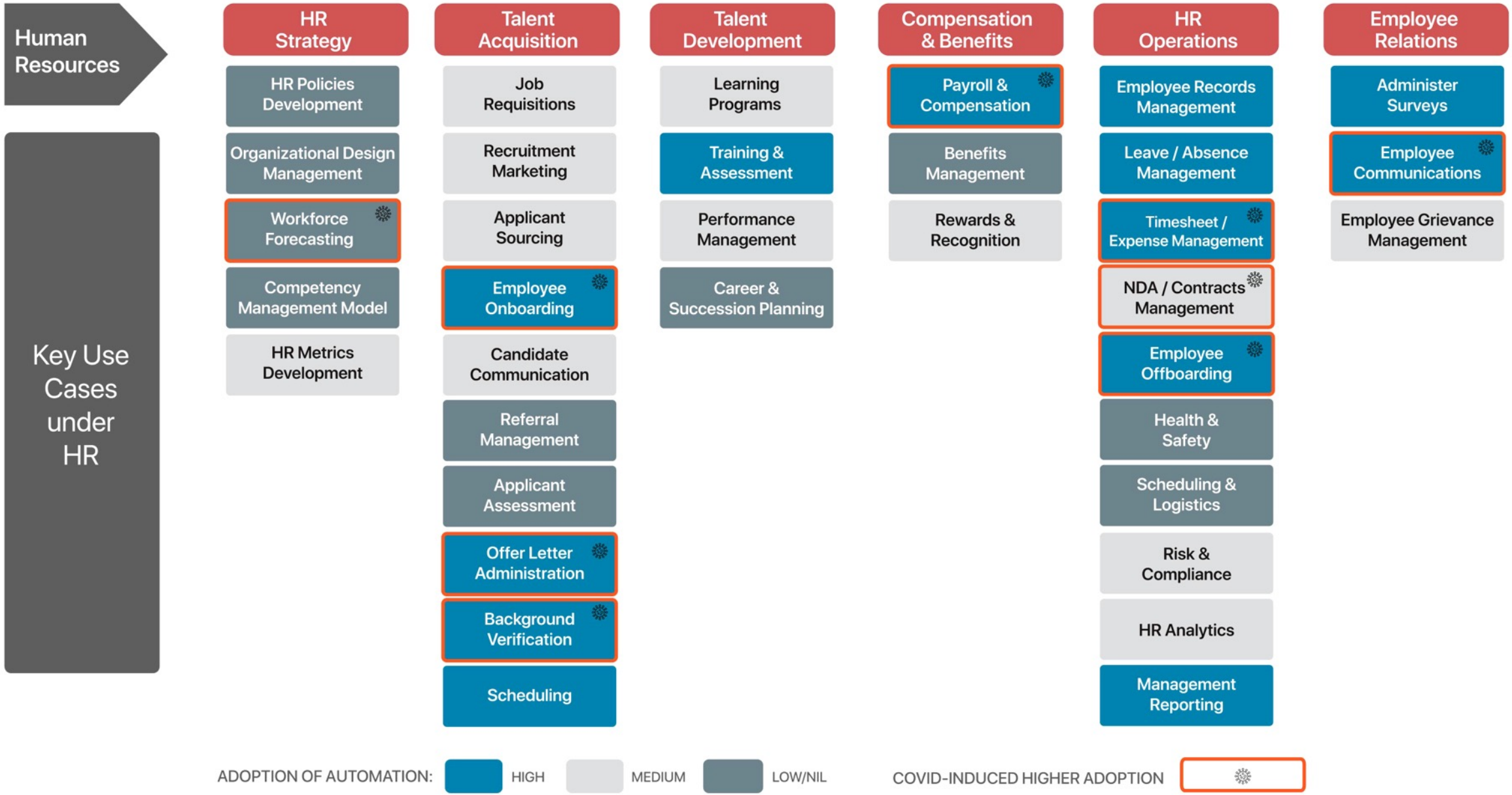
**63%** companies state reducing Invoice Processing costs as number one priority (IOFM)

**3.6%** of invoices manually entered include errors due to data entry (IOMA)

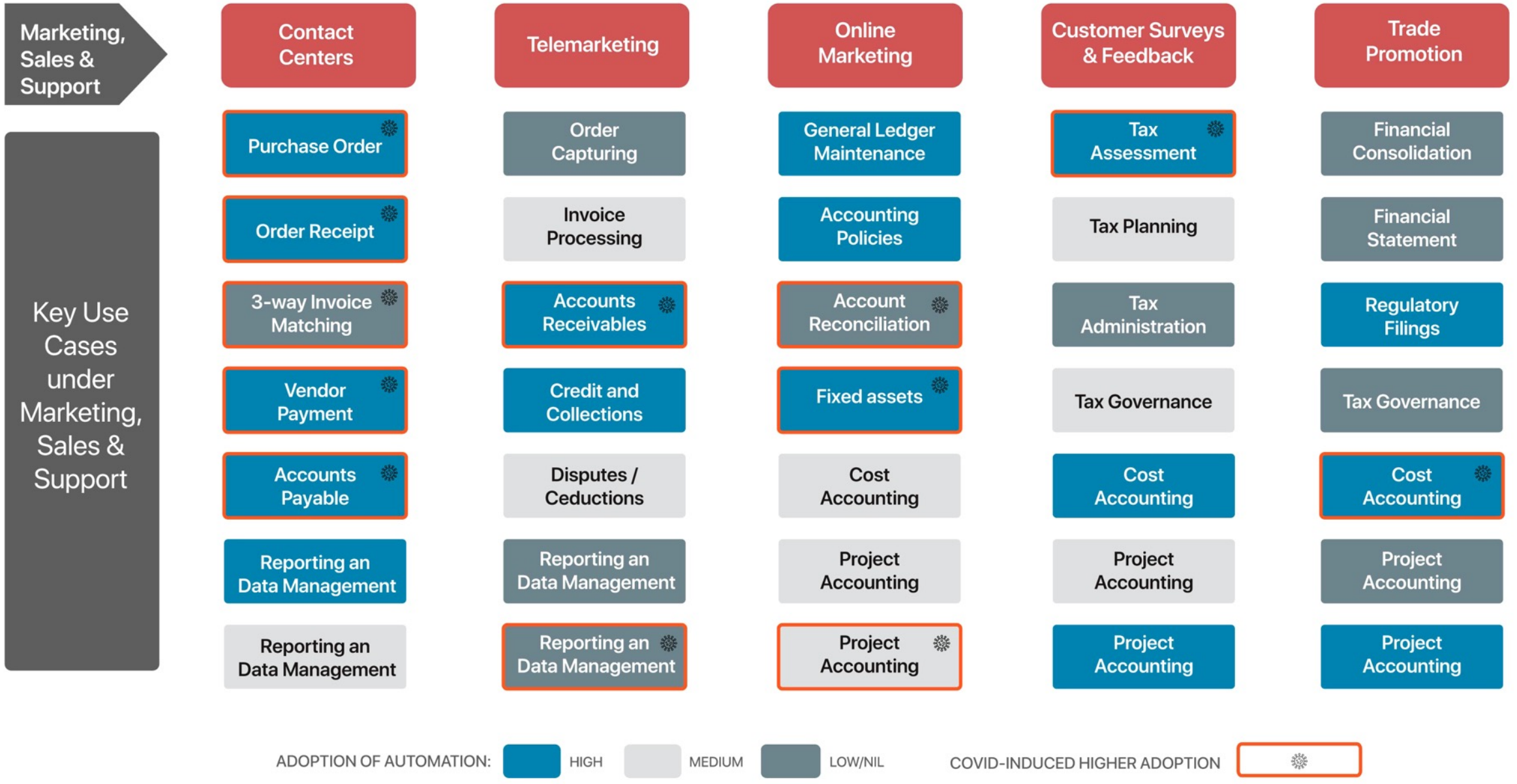
**~16.3** days average time to process a single invoice (Aberdeen Group)

Note: The "3-way match" refers to matching three documents - the invoice, the purchase order, and the receiving report - to ensure that a payment is to be made. If this 3-way match reveals that the Supplier Invoice is in good order, then the Accounts Payable staff processes the invoice for payment.

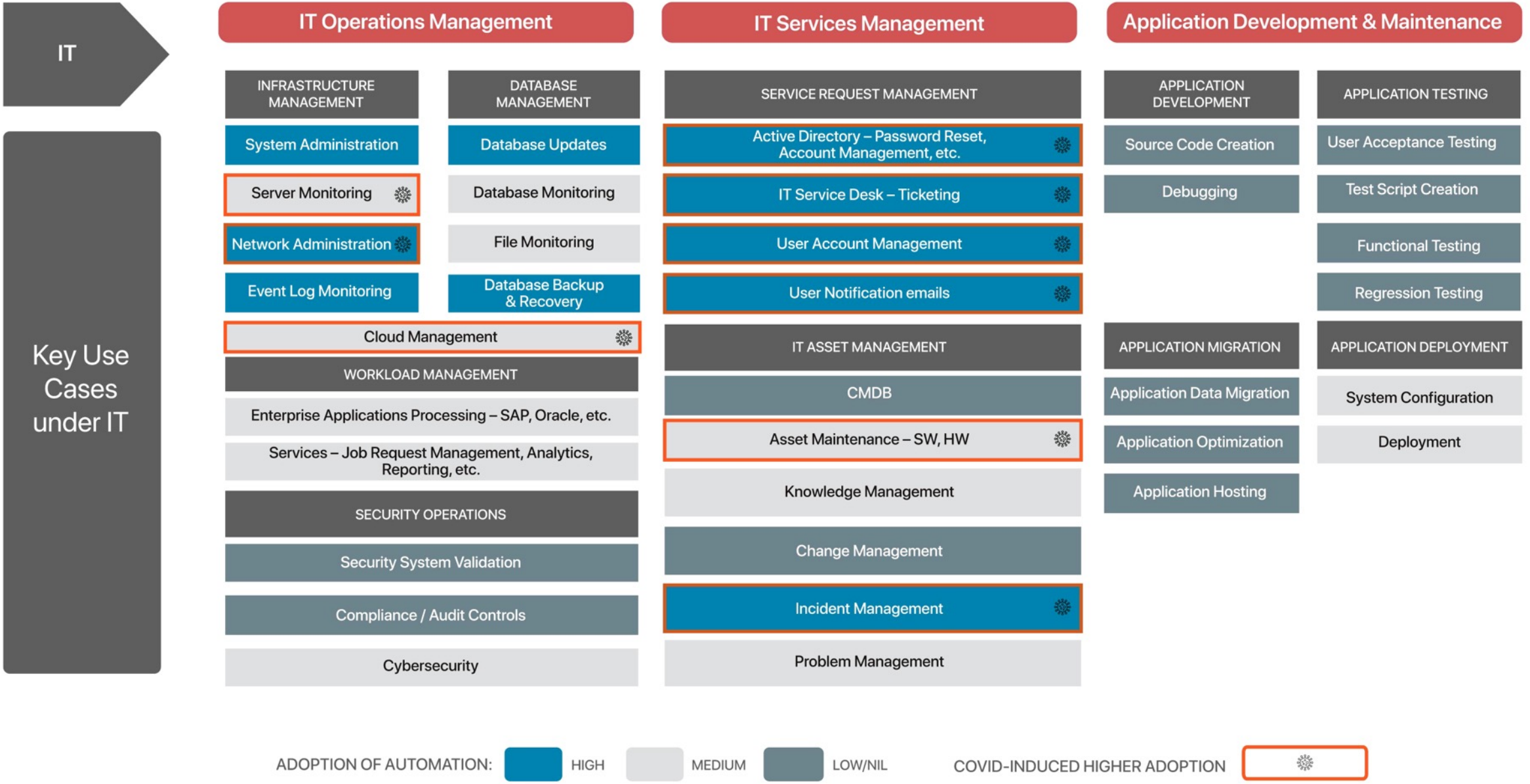
# Remote Work prompting higher HIA uptake within HR Functions



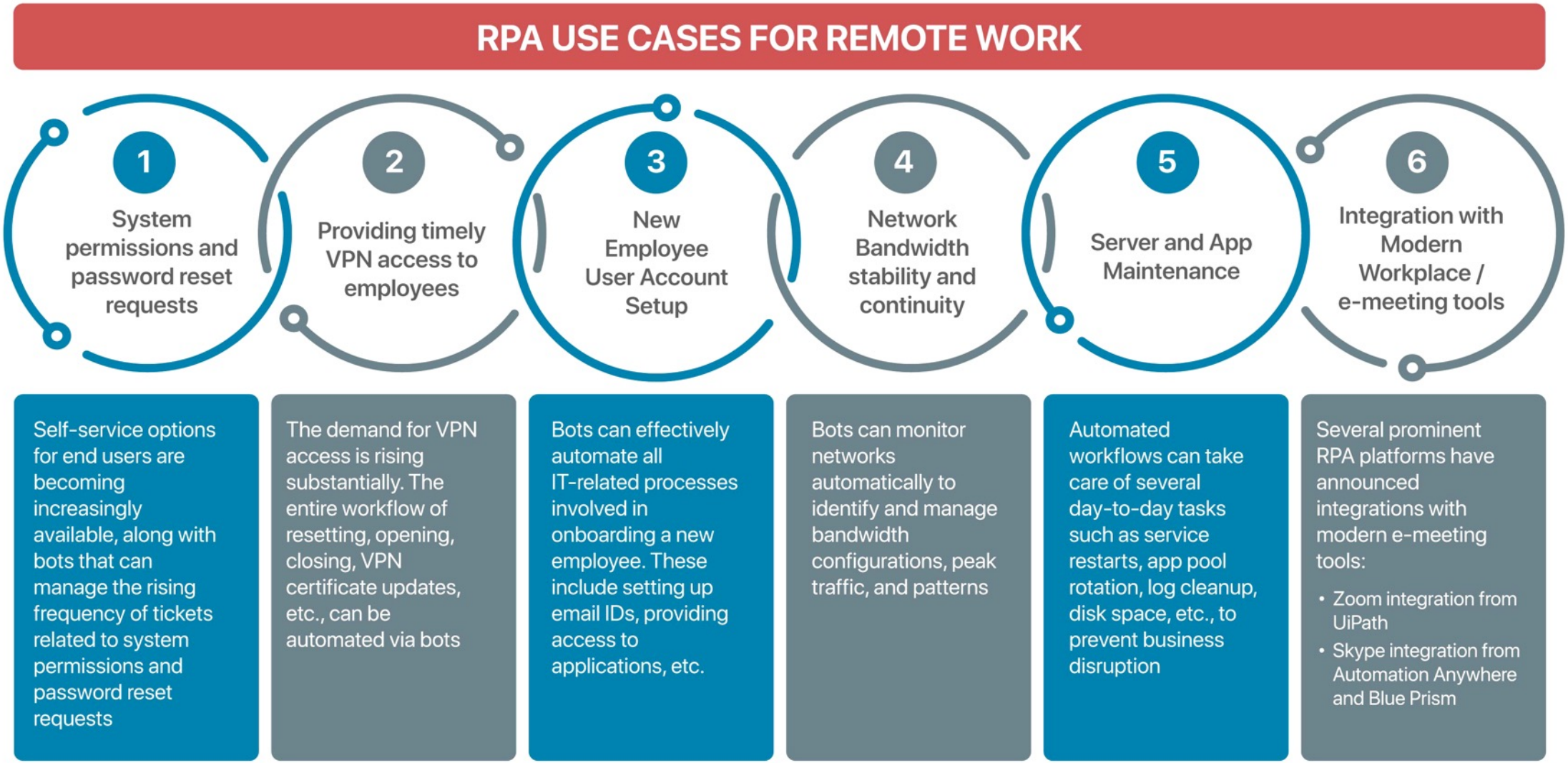
# Automation within Contact Centers ensuring higher Customer Satisfaction



# IT Automation gaining prominence – both during and in post-COVID-19 era



# ‘New Normal Work Conditions’ propelling adoption of IT Automation



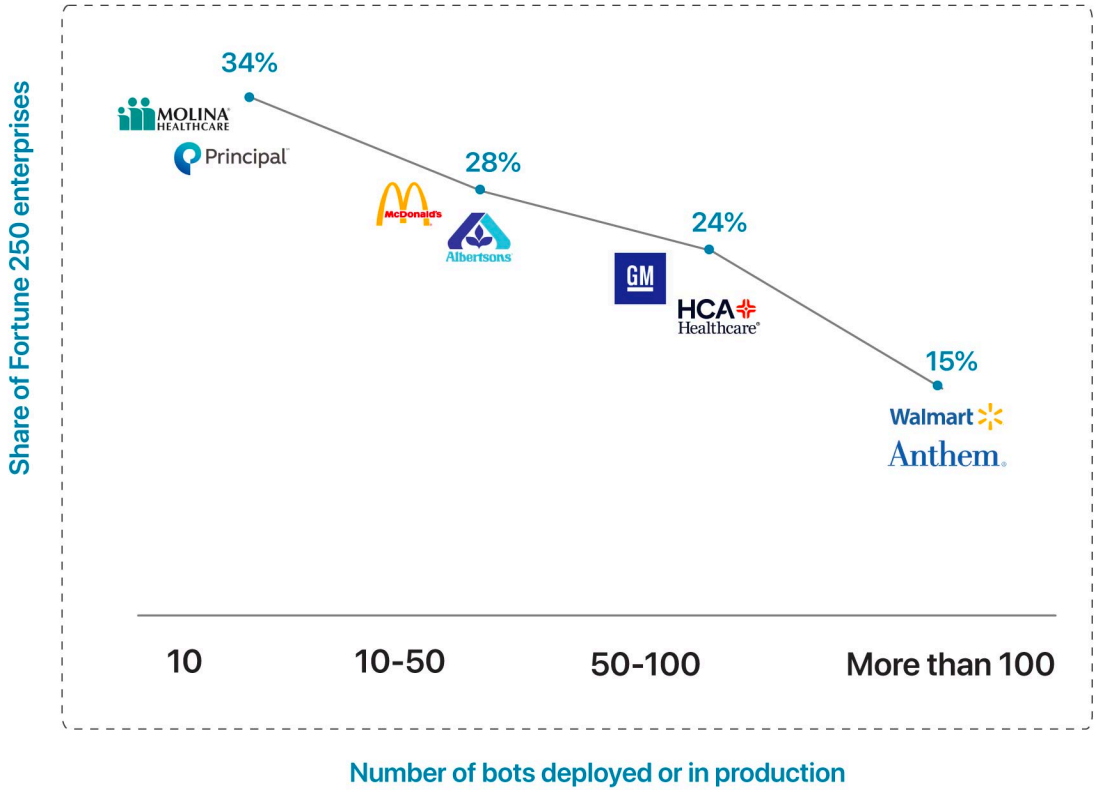
# Despite rising adoption, enterprises struggle to scale HIA deployments

## FACTORS DEFINING SCALE OF HIA

- **A** Number of Bots deployed / in production
- **B** Breadth of business processes covered
- **C** Depth of use cases automated

## FORTUNE 250 – HIA DEPLOYMENT STATUS

**Only 15% Fortune 250 Enterprises have 100+ bots in production**




## SCALING-RELATED CHALLENGES

| HIA Adoption-related Challenges | Impact on Scalability |
|---|---|
| Unrealistic and inconsistent ROI expectations among stakeholders | HIGH |
| Inability to automate end-to-end use cases – which are fragmented across geographies and functions | |
| Undefined ownership and accountability between IT, BUs, and Ops | |
| Presence of organizational siloes leading to inadequate sharing of use case knowledge from BUs | |
| Long deployment cycles of IA – onboarding of bots, training, conformance, etc. | |
| Inability to automate use cases with unstructured data (that require AI/ML, NLP, IDP, CV, etc.) | MEDIUM |

# Enterprise Playbook to Scale HIA deployment

## Organizational Setup

### Automation-focused Leadership

- Design automation-specific organizational structure
- Dedicated CXO and senior positions to drive automation agenda

### Develop end-to-end Automation approach

- iBPMS-enabled process optimization, Low-Code / No-Code deployment and AI-powered Automation

### Collaboration between IT, Business Units, and Ops

- Buy-in from all functions for joint Automation effort and use case sharing

## Operations & Governance

### Set up Center of Excellence (CoE)

- Federated / Hybrid CoE model driving Automation efforts for each BU

### Establish Governance Structure

- Define security measures
- Lay down operational guidelines

### Enable Effective Change Management

- Transparent communication to educate and prepare employees
- Launch upskilling and reskilling initiatives

## Technology Prowess

### Prioritize processes via Use Case Discovery

- Scientific and structured approach to use case prioritization using Process Mining and Task Mining

### Employ AI-powered Automation

- Advanced capabilities in ML, NLP, and CV to unlock more complex use cases

### Effective Leverage of Automation ecosystem

- Tap into internal and external talent pools (including Citizen Developers)
- Leverage partner network including Service Providers, specialist platforms, and start-ups

# Establish an Organizational Structure for long-term Automation success

## ORGANIZATIONAL SETUP

### 1 AUTOMATION-FOCUSED LEADERSHIP

**40-45% Fortune 250 Enterprises have Automation-focused Leadership**

- Honeywell: Veronica Loyola: Director, Process Automation
- Walmart: Anoop Prasanna: Director - Head of Intelligent Automation
- AIG: Jermaine Everett: Head of Robotics & Automation CoE in AIG
- Wells Fargo: Raj Panisetty: SVP, Automation Technology Leader
- Kohl's: Adam Krehbiel: RPA and Intelligent Automation Leader

### 2 DEVELOP AN END-TO-END AUTOMATION APPROACH

**30-35% Fortune 250 Enterprises are investing in end-to-end HIA**

- Celonis: Process Mining to discover processes by analyzing ERP systems
- Foxit: Processing unstructured data hidden in design drawing, manuals, and images
- Pega: Leveraging Pega to streamline service contract process (attended RPA)
- UiPath: Deployed 20 bots to automate 300+ processes (unattended RPA)

### 3 COLLABORATION BETWEEN IT, BUSINESS, AND OPS

JPMorganChase

**Joint collaboration between IT, Product, and Operations teams from the beginning**

**Centralized CoE to share best practices and source use cases**

Robotics & Dashboards CoE to work with internal business groups to crowdsource and share use cases

# Devise Guidelines and establish Best Practices for Governance

## OPERATIONS & GOVERNANCE

### 1 SET UP A CENTER OF EXCELLENCE (COE)

**35-40%** Fortune 250 Enterprises have CoEs focused on Automation

DELL

Launched a CoE in 2015 in Austin, Texas

**Hybrid Model**

Centralized CoE works along with BU-specific CoEs to share Automation best practices and develop Automation lifecycle

Analyzing Business Automation requirements and approach

### 2 ESTABLISH GOVERNANCE STRUCTURE

EATON

**Multi-tiered Governance Structure**

Align business priorities and secure buy-in

**Executive Steering Council** comprising of senior business and functional leaders to provide guidance and sponsorship

**IT Steering Council** with CoE leaders and business relationship managers to align program priorities with the roadmap

**Decision Gate Committee** for oversight and final sign-off

### 3 ENABLE EFFECTIVE CHANGE MANAGEMENT

CISION

**Empowering impacted employees**

Engaged affected employees and included them in the team leading Automation

Employees began identifying use cases within day-to-day workflows

Established control measures, guidelines, and risk management measures

Devised upskilling programs and designed career progression path for employees

# Augment Technology Capabilities to unlock more value from Automation

## TECHNOLOGY PROWESS

### 1 PRIORITIZE PROCESSES VIA USE CASE DISCOVERY

**10-15%** Fortune 250 Enterprises leveraging Use Case Discovery

vodafone

Analyzed event logs of enterprise applications to streamline internal business operations such as Purchase Order Sequencing

**Outcome:**

20% improvement in time to market

85% increase in purchase orders processed

### 2 EMPLOY AI-POWERED AUTOMATION

**55-60%** Fortune 250 Enterprises exploring AI-led Automation Use Cases

Scotiabank

Leveraged NLP and CV to automate processing of unstructured data from company websites (including Google.com) to assess potential Anti Money Laundering (AML) and reputational exposure

**Outcome:**

$15 Mn in projected annual cost savings

105 FTEs freed up (from 500+ FTEs earlier)

### 3 EFFECTIVE LEVERAGE OF AUTOMATION ECOSYSTEM

UnitedHealth Group℠

**200+ Automation-focused talent**

PEGA — Automating legacy customer contact center operations

UiPath — Automated payment integrity, claims, benefits, and reporting (Optum)

**Key Automation-focused Service Providers**

IBM · TATA CONSULTANCY SERVICES · ITC INFOTECH

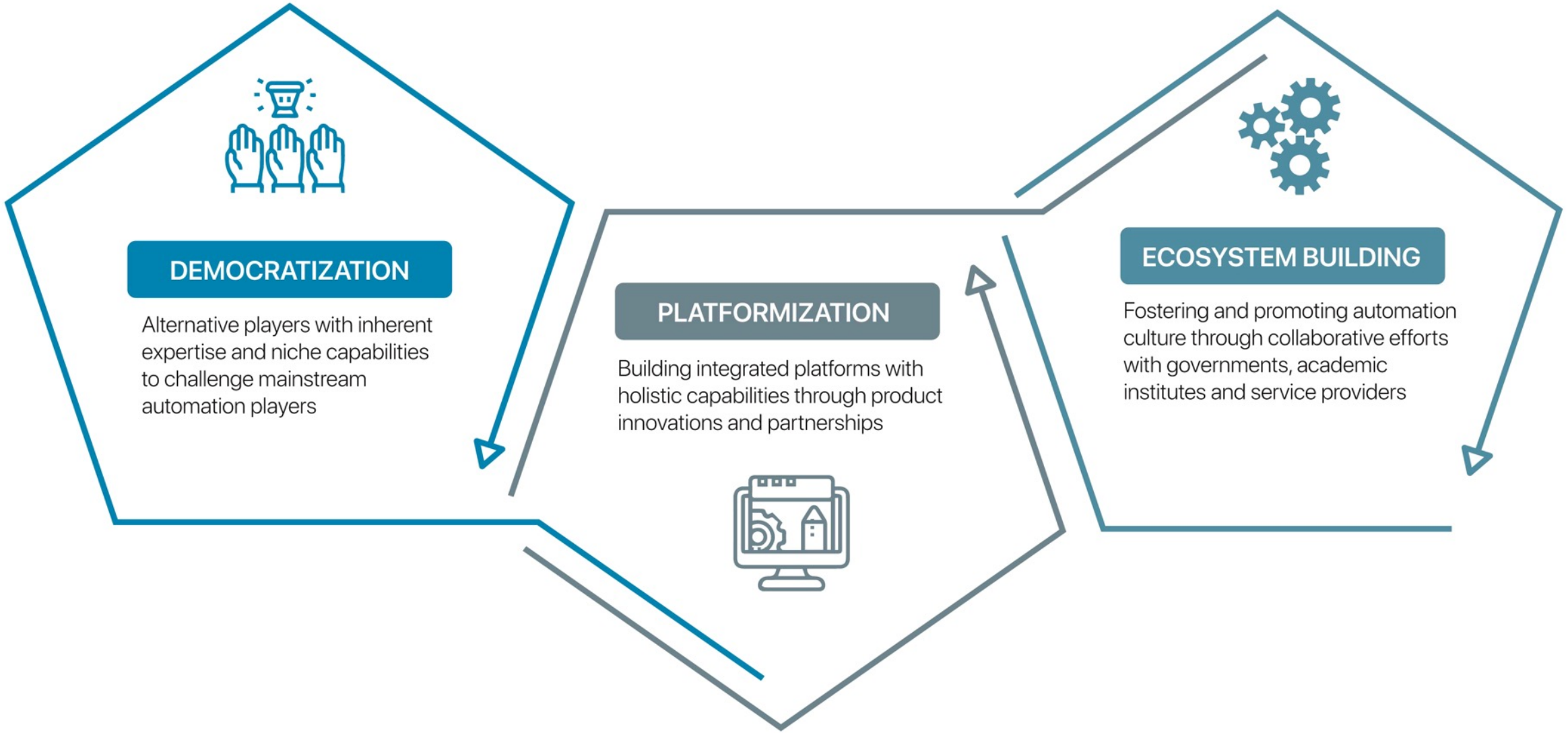
# 500+ Automation platforms in the race to capture the $65Bn worth HIA market

**500+ HIA Platform companies**

| HIA Segments | HIA Platform Distribution | Illustrative platforms |
|---|---|---|
| USE CASE DISCOVERY | 10-15% (60-70) | celonis, myinvenio, minit, SIGNAVIO, QPR |
| INTELLIGENT DOCUMENT PROCESSING [IDP] | 15-20% (90-100) | ABBYY, KOFAX, WorkFusion, VIDADO, PARASCRIPT |
| iBPMS | 35-40% (190-200) | Appian, PEGA, K2, aura portal, BP LOGIX |
| BUSINESS PROCESS AUTOMATION | 15-20% (90-100) | UiPath, AUTOMATION ANYWHERE, blueprism, NICE, KRYON |
| IT AUTOMATION | 5-10% (40-50) | ayehu, IPSOFT, arago, TRICENTIS |
| WORKFLOW AUTOMATION | 35-40% (190-200) | nintex, FlowForma, integrify, AppSheet, ARGOSLABS |

Note: Due to platforms providing solutions across multiple HIA segments, percentages do not add up to 100

# Platform trends defining the HIA Landscape in 2020



# Intensifying competition leading to Democratization of Automation

## NEW COMPETITION TO TRADITIONAL RPA PLATFORMS

### RPA PLATFORMS

Greater focus on Citizen Developers

AI-powered conversational capabilities

App workflow development and deployment

blueprism

**$120 Mn** raised in equity financing in April, 2020

UiPath · Automation Anywhere · NICE · KRYON

### TECHNOLOGY GIANTS

Partnering with Automation platforms and joint GTM motions

High focus on building in-house capabilities and acquisitions

Microsoft » softomotive

Acquired in May, 2020

IBM » WDG · Google · SAP

### LOW-CODE / NO-CODE PLATFORMS

Focused on BPM or Workflow Automation

Acquiring RPA platforms to build end-to-end capabilities

Rise of native Low-Code/No-Code Automation Platforms

Appian » Jidoka

Acquired in Jan, 2020

ARGOSLABS · NTTAT · nintex · WinActor

### OPEN SOURCE

Gaining prominence and support from VC investors

High focus on existing whitespaces of IT Automation and SMB customer segments

Robocorp

**$11.4 Mn** VC funding raised till date

Automagica · taskt · apromore · UI.Vision

### EMERGING START-UPS

200+ start-ups creating niche capabilities across HIA segments

APAC based HIA start-ups raising VC funding despite COVID-19

**$100 Mn+** VC funding raised by Chinese RPA Start-ups in H1, 2020

达观数据 · Catalytic

# Creating “Platform of Platforms” through Build/Buy and Partner strategy

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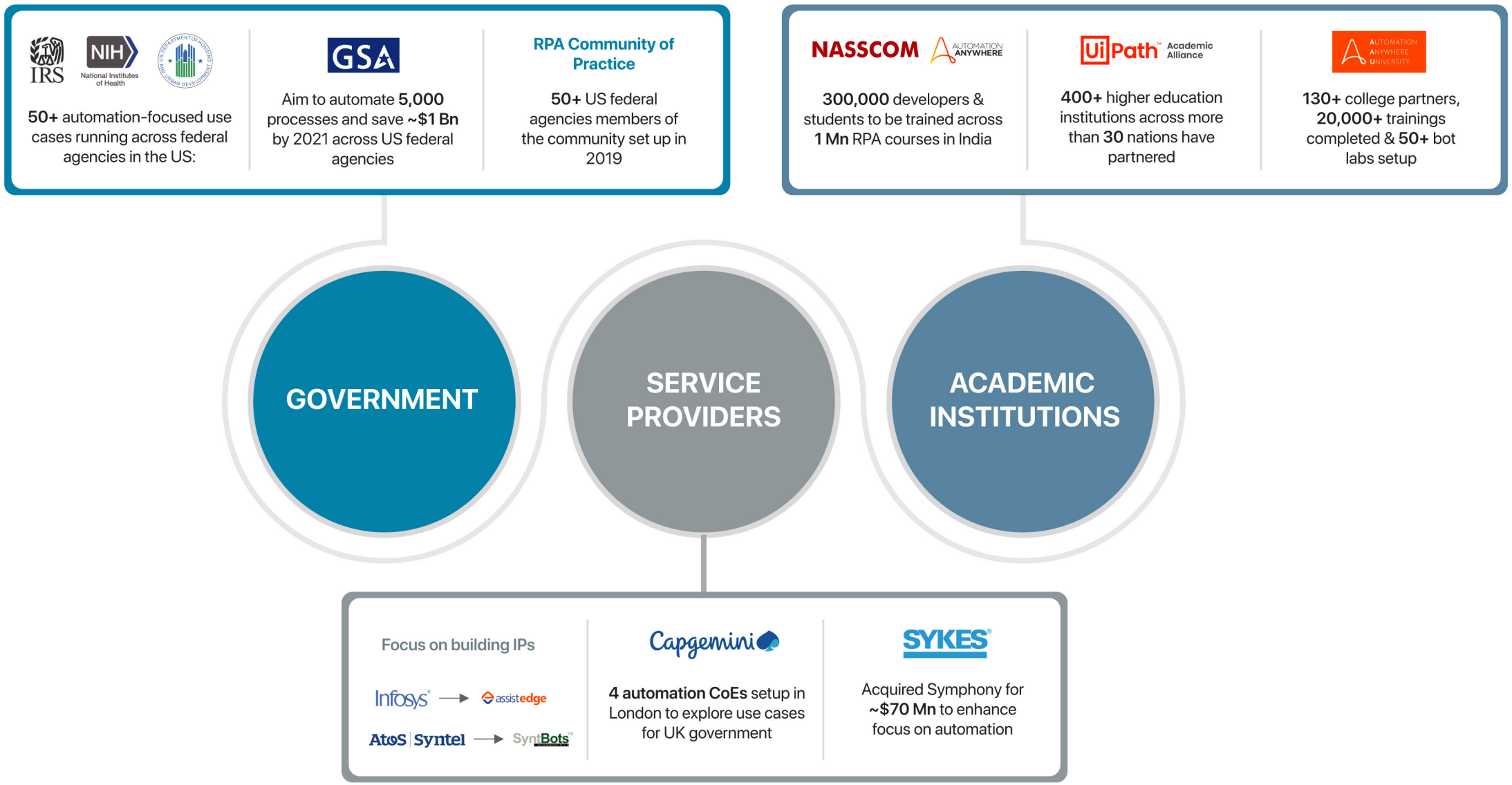
| HIA Segments | USE CASE DISCOVERY | DATA TRANSFORMATION | PROCESS REIMAGINATION | BUSINESS OPTIMIZATION |
|---|---|---|---|---|
| | PROCESS MINING<br>TASK MINING | INTELLIGENT DOCUMENT PROCESSING [IDP] | INTELLIGENT BUSINESS PROCESS MANAGEMENT SUITE (iBPMS) | PROCESS AUTOMATION<br>IT AUTOMATION<br>WORKFLOW AUTOMATION |
| Product Focus | • Evolving focus on Task Mining<br>• ROI prediction for to-be processes | • Depth of industry-specific use cases<br>• Hybrid approach of Pre-built + Custom-built bots | • Combining RPA with Low-Code/No-Code<br>• Added capabilities such as document generation, e-sign, etc. | • Increasing focus on IT automation<br>• Leveraging vast API-based integrations<br>• App workflow integration & automation |

| | USE CASE DISCOVERY | | DATA TRANSFORMATION | | PROCESS REIMAGINATION | | BUSINESS OPTIMIZATION | |
|---|---|---|---|---|---|---|---|---|
| | BUILD/BUY | PARTNER | BUILD/BUY | PARTNER | BUILD/BUY | PARTNER | BUILD/BUY | PARTNER |
| UiPath | Discovery Suite Acquisitions: PROCESSGOLD, StepShot | minit, myinvenio | UiPath Document Understanding, ML Extractor, AI Fabric | ABBYY, (h[s]) HYPERSCIENCE | – | Appian, Bonitasoft | RPA Platform – Studio, Studio X, Automation Hub etc. | DataRobot, ELEMENT AI |
| Appian | – | celonis, TIMELINEPI | Appian IDP, Appian Records | ABBYY, ARTSYL | Appian BPM Platform Suite | – | Low Code Platform Acquisition: Jidoka | UiPath, blueprism, AUTOMATION ANYWHERE |
| Microsoft | – | QPR, Fortress IQ | MS Computer Vision OCR, Office Document Scanning | ABBYY, KOFAX | Microsoft BPM Suite | Appian, nintex | Power Automate (UI Flows) Acquisition: softomotive | UiPath, blueprism, AUTOMATION ANYWHERE |

# Promoting Automation through collaborative efforts with Ecosystem

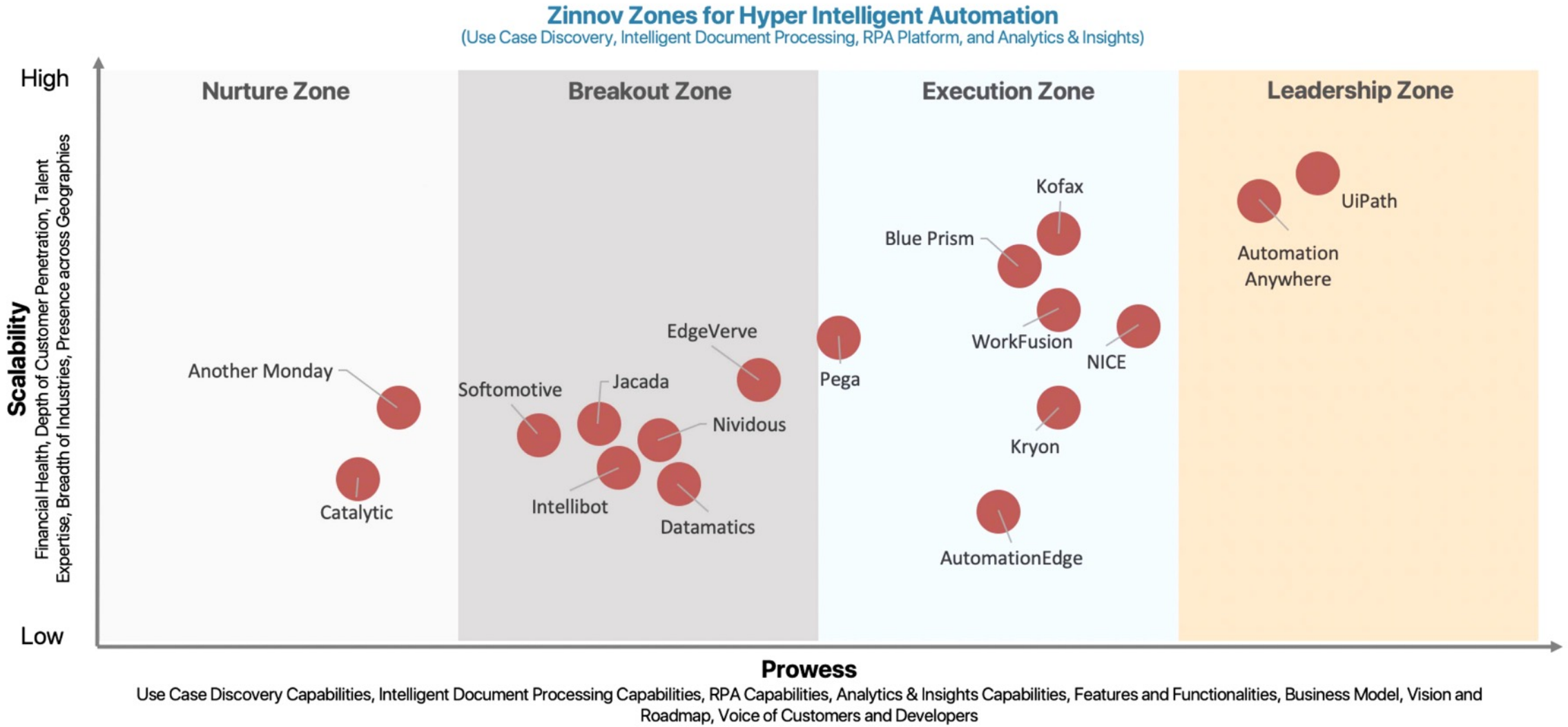


# Zinnov Zones : focus categories for 2020

zinnov™ ZONES

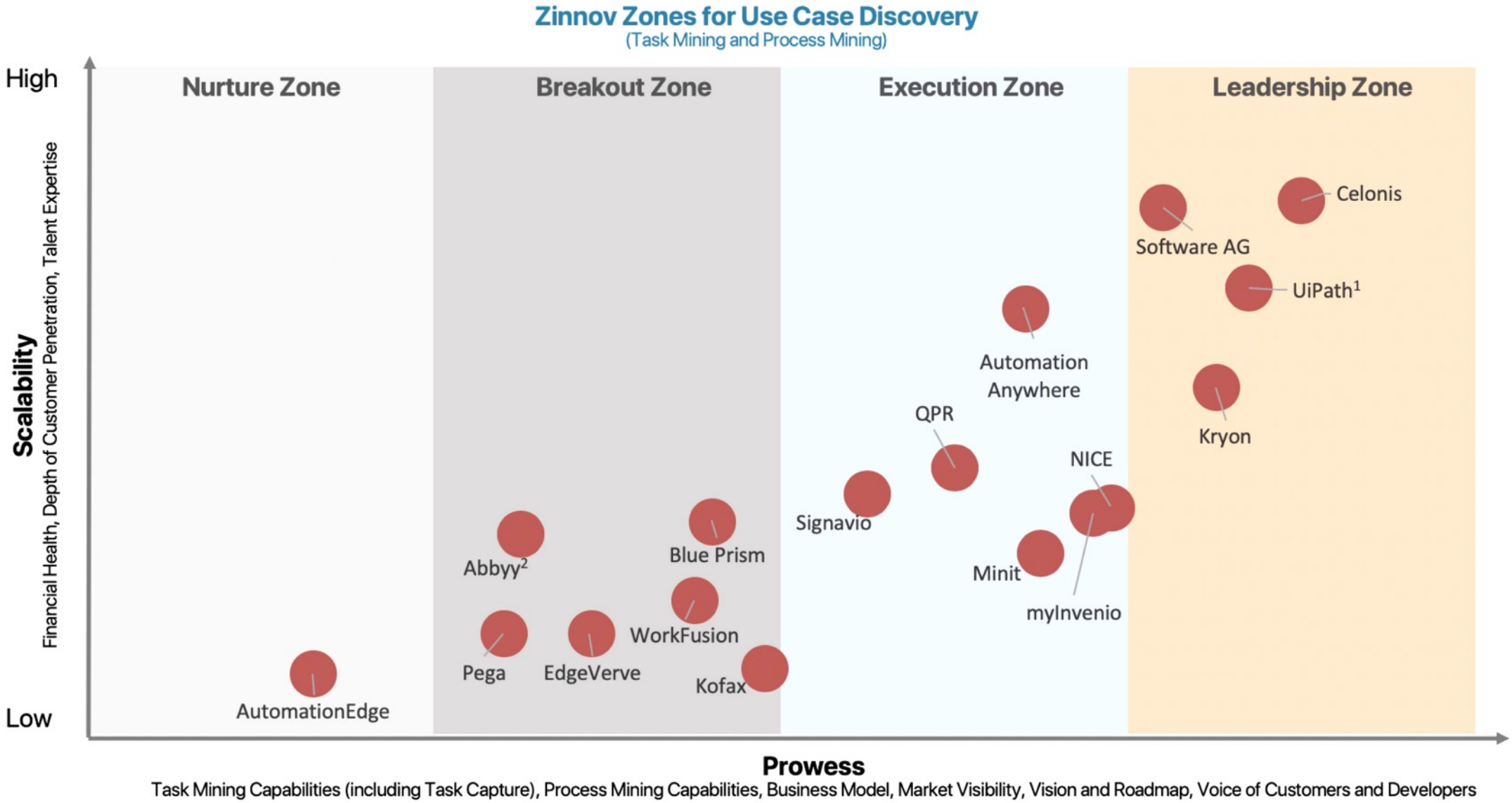
1. Zinnov Zones for **Hyper Intelligent Automation**
2. Zinnov Zones for **Use Case Discovery**
3. Zinnov Zones for **Intelligent Document Processing**
4. Zinnov Zones for **RPA**
5. Zinnov Zones for **Attended RPA**
6. Zinnov Zones for **IT & ER&D Automation**

# Zinnov Zones for Hyper Intelligent Automation



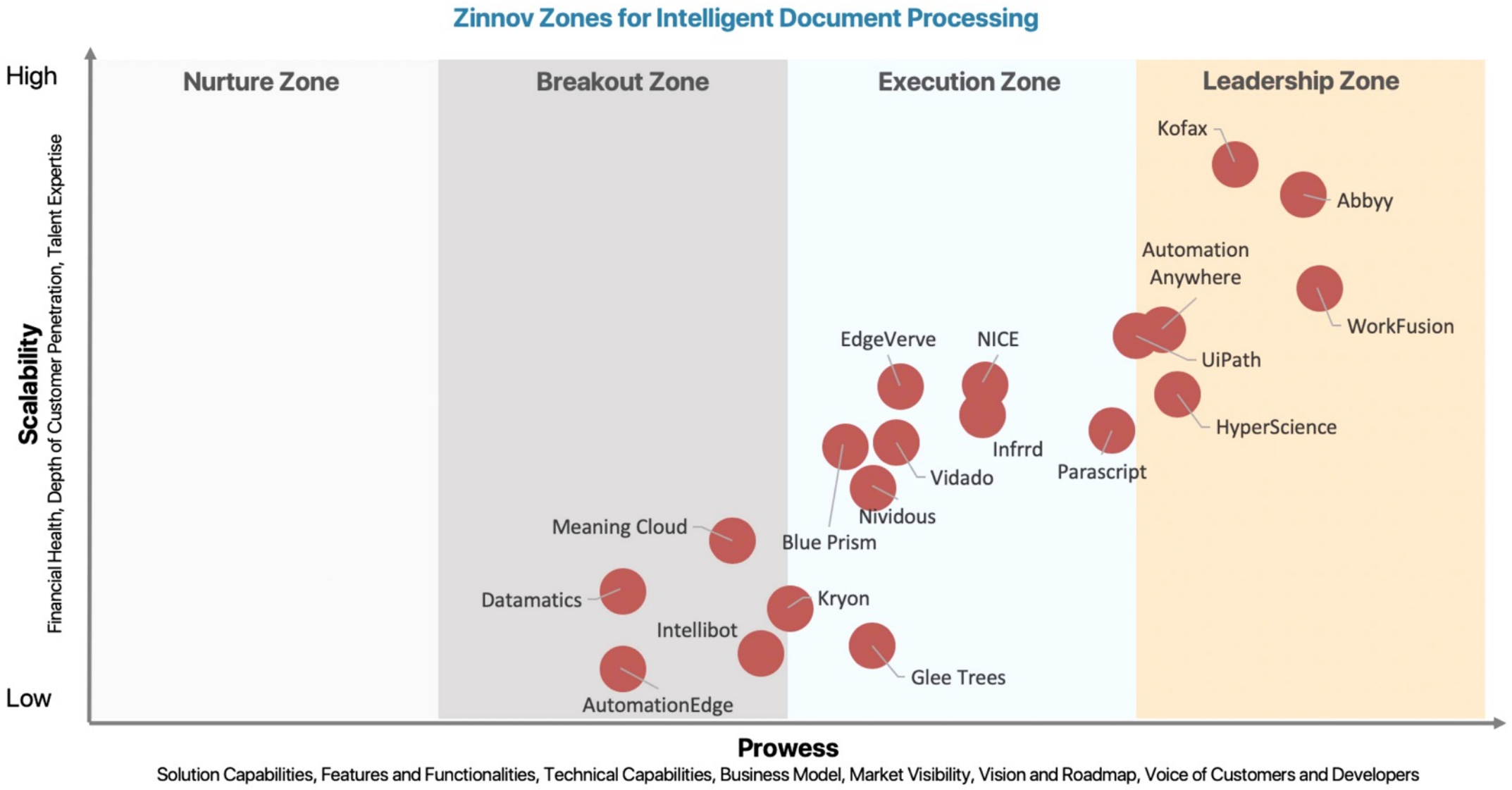

*Zinnov ran the Request for Information (RFI) process with participating companies between Jan 2020-March 2020 and a variety of inputs on both prowess and scale were collected to assess the positioning. In some cases (for e.g. with Automation Anywhere, Jacada etc.), where companies could not respond to RFIs in the stipulated timeframe, Zinnov team ensured to conduct the briefing calls & products demos to collect the inputs. In parallel, Zinnov also ran an extensive research with global enterprise customers (100+), leading service providers (20+), developers (500+), domain experts and publicly available data to collect the required information for the rating process

# Zinnov Zones for Use Case Discovery




1Includes UiPath's acquisition of ProcessGold in Oct 2019 (for process mining) and StepShot in Aug 2019 (for task capture); 2Includes Abbyy's acquisition of TimelinePI in May 2019 (for process mining)
*Zinnov ran the Request for Information (RFI) process with participating companies between Jan 2020-March 2020 and a variety of inputs on both prowess and scale were collected to assess the positioning. In some cases (for e.g. with Automation Anywhere, Jacada etc.), where companies could not respond to RFIs in the stipulated timeframe, Zinnov team ensured to conduct the briefing calls & products demos to collect the inputs. In parallel, Zinnov also ran an extensive research with global enterprise customers (100+), leading service providers (20+), developers (500+), domain experts and publicly available data to collect the required information for the rating process

# Zinnov Zones for Intelligent Document Processing

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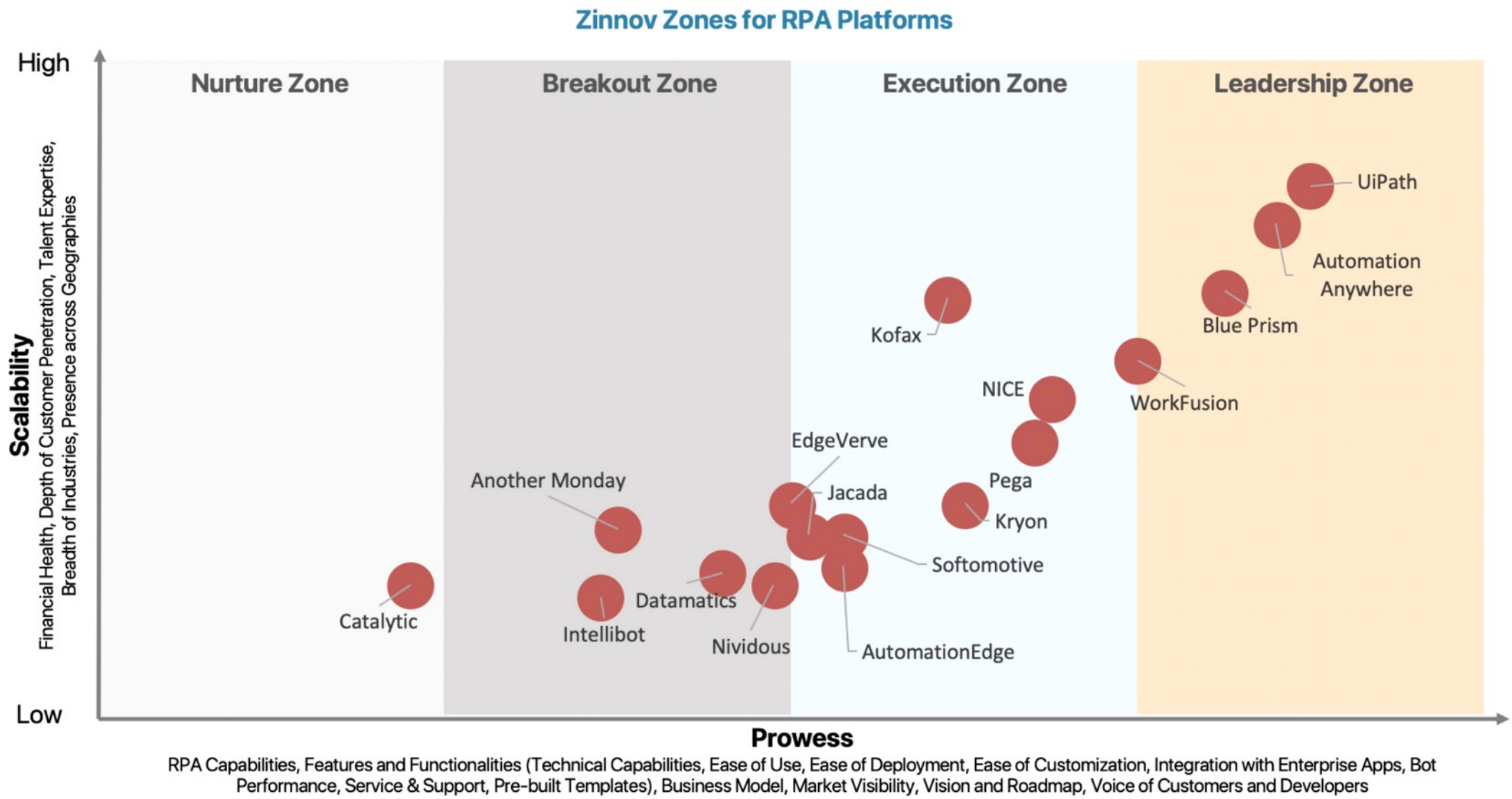
# Zinnov Zones for RPA Platforms

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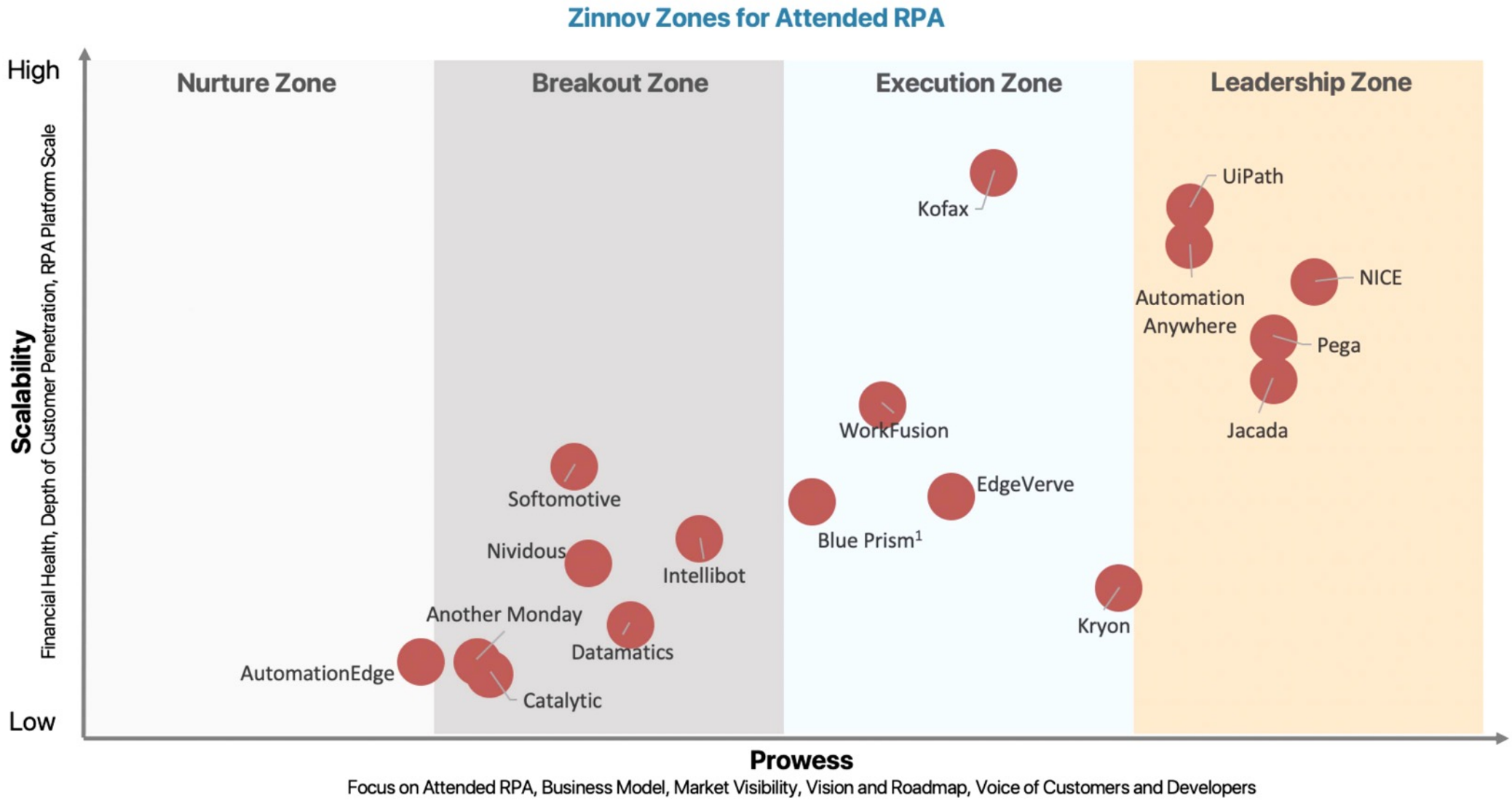
# Zinnov Zones for Attended RPA




1Includes Blue Prism's acquisition of Thoughtonomy in Jun 2019

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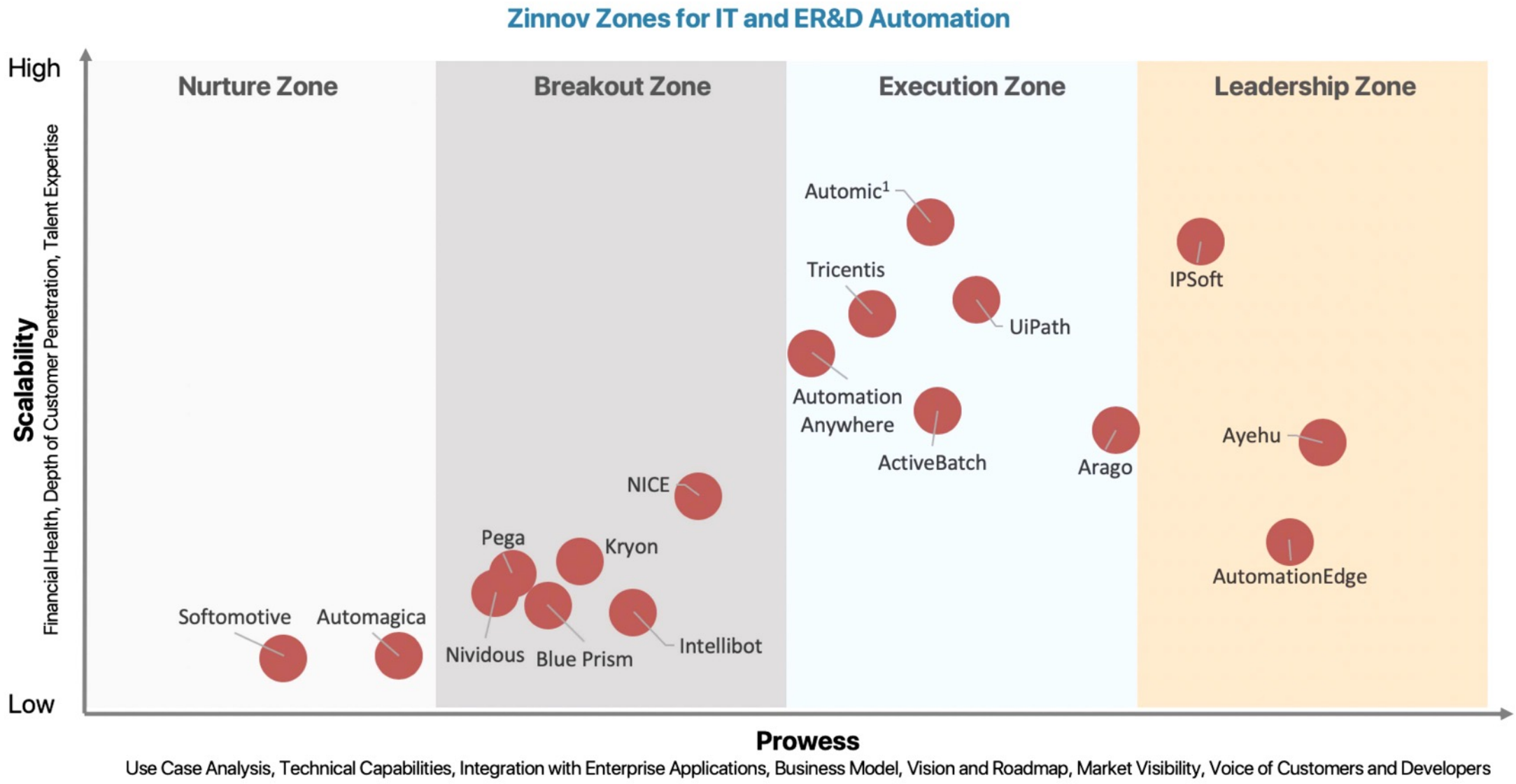
# Zinnov Zones for IT and ER&D Automation




1Automic was acquired by Broadcom in Jul 2018

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