

UiPath Thought Leadership Study: Data Review

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Agenda

Survey objectives and approach

Advancing Automation Transforms The Workplace

Owning The Future OF Work

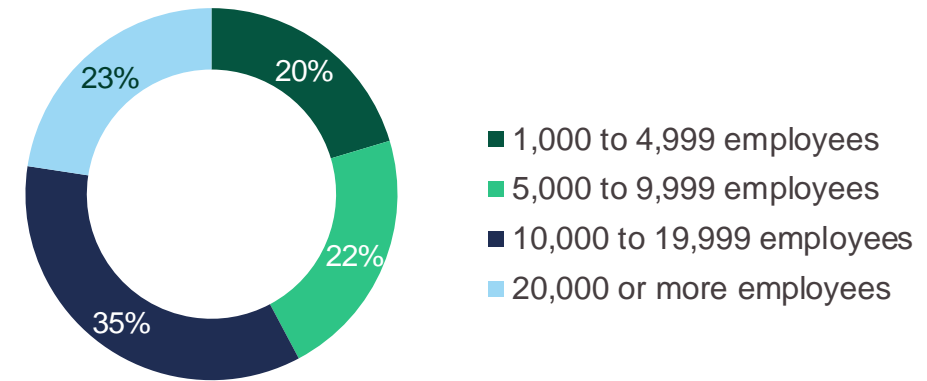
Key Takeaways

Work Survey

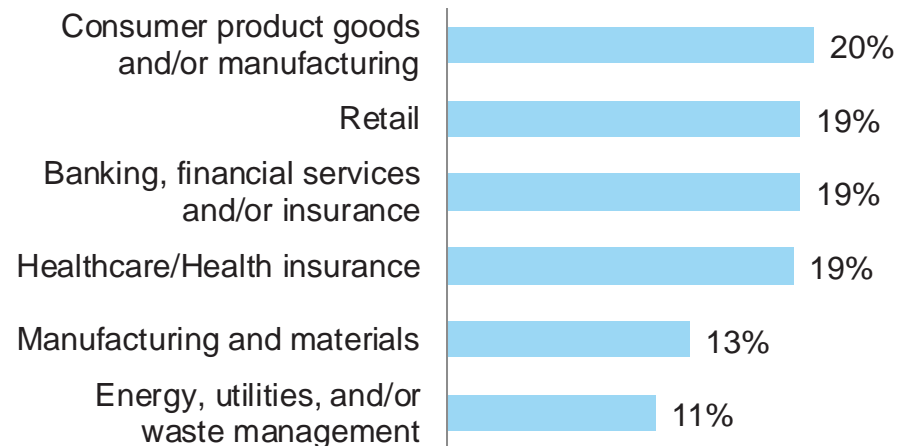
Country



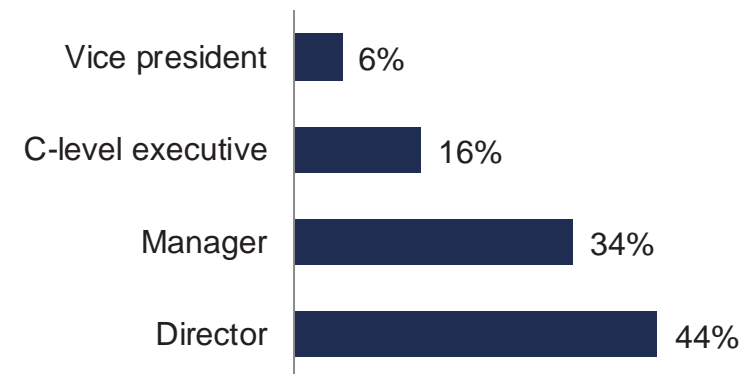
Company Size



Industry

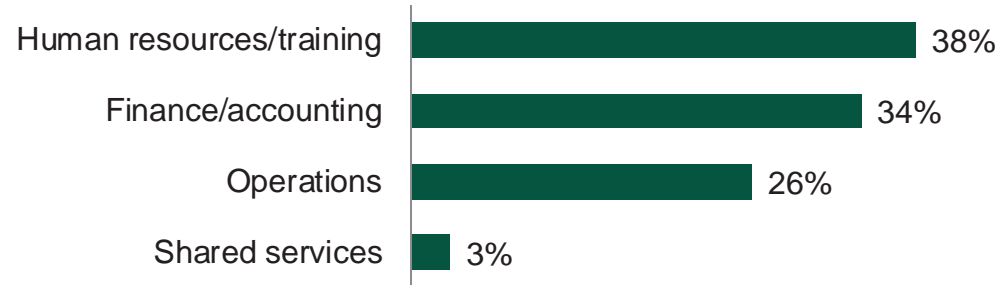


Respondent level

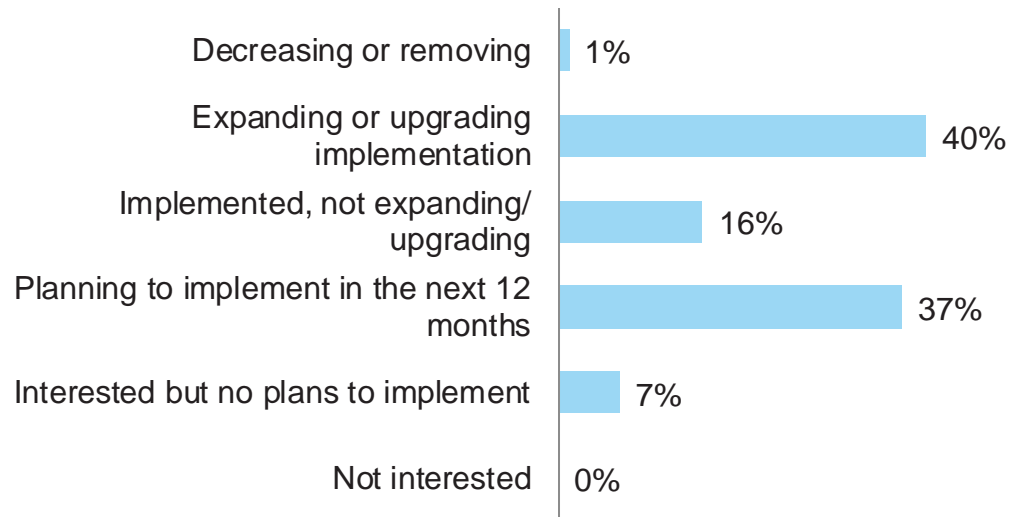


That Spoke To People In The Know

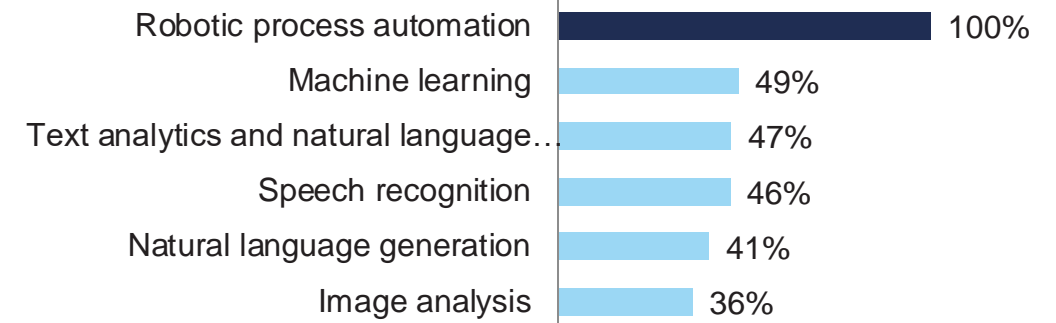
S5. Department



S7. Process automation plans



S6. AI (digital assistants)



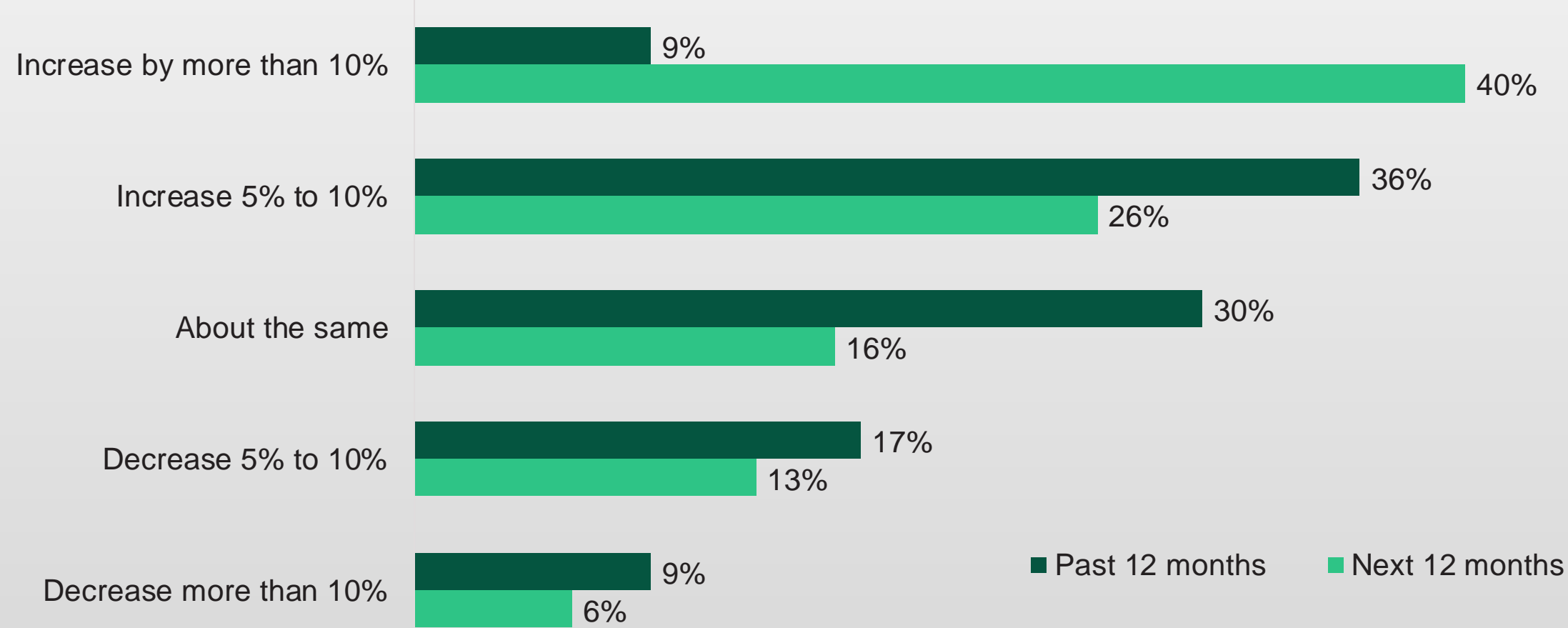
S8. Responsibility



Spend on RPA technology to increase 31% (9% last year vs. 40% next year)

Increasing spend by at least 5%: Past 12 months, spend was 45% // Next 12 months spend will be 66%

Q2. “How has your group/department spending on technology Robotic Process Automation (RPA) changed over the past 12 months? How do you expect it to change over the next 12 months?”



The Forces Of Automation



- Flattening Organizations
- Digital Platforms



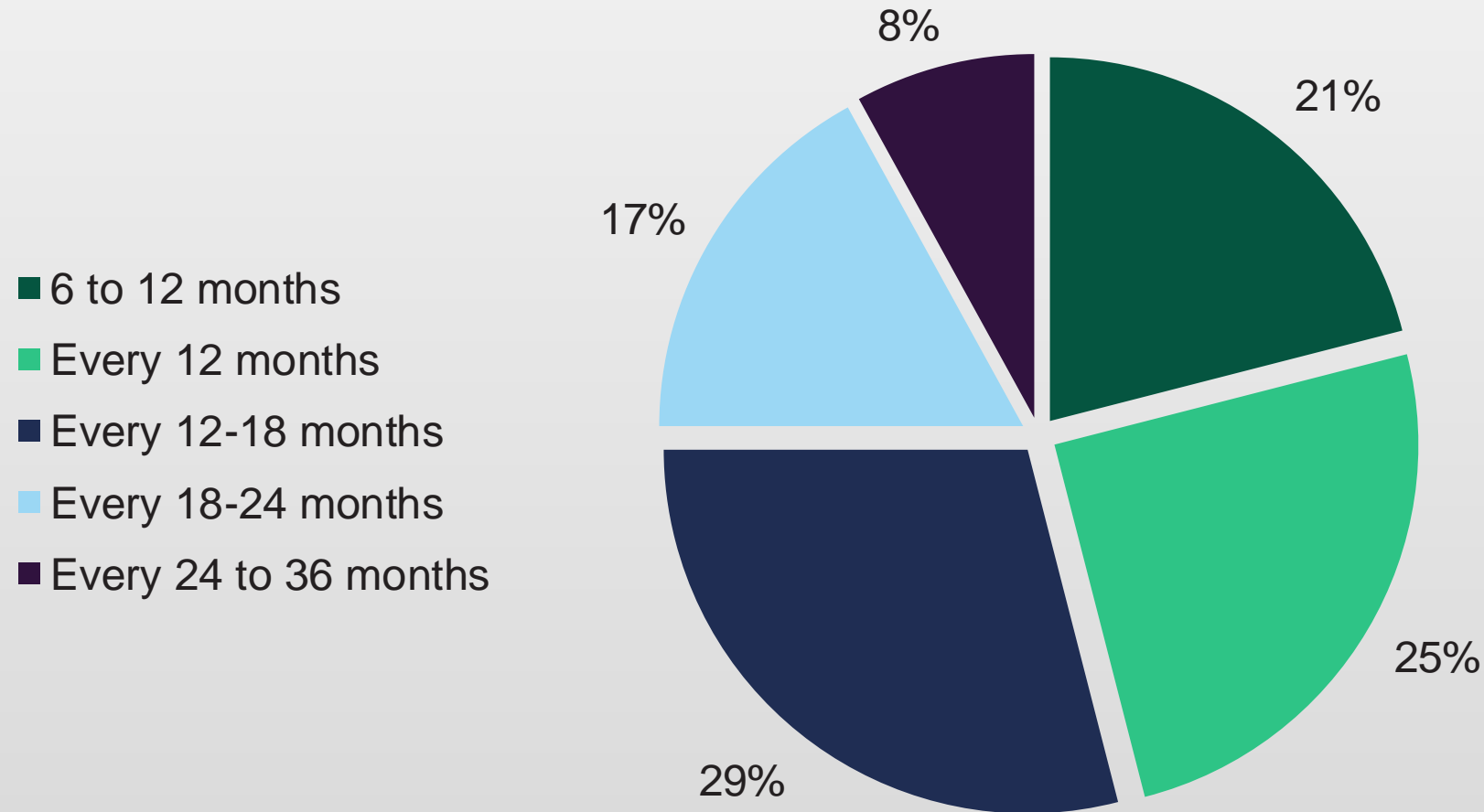
- Granny Meet You Robot
- Reduce Coordination & Logistics Burden



- Decisions Move To Machines
- Unpredictably & Data Control

Automation Is Refreshing The Employee Experience At An Increasing Rate

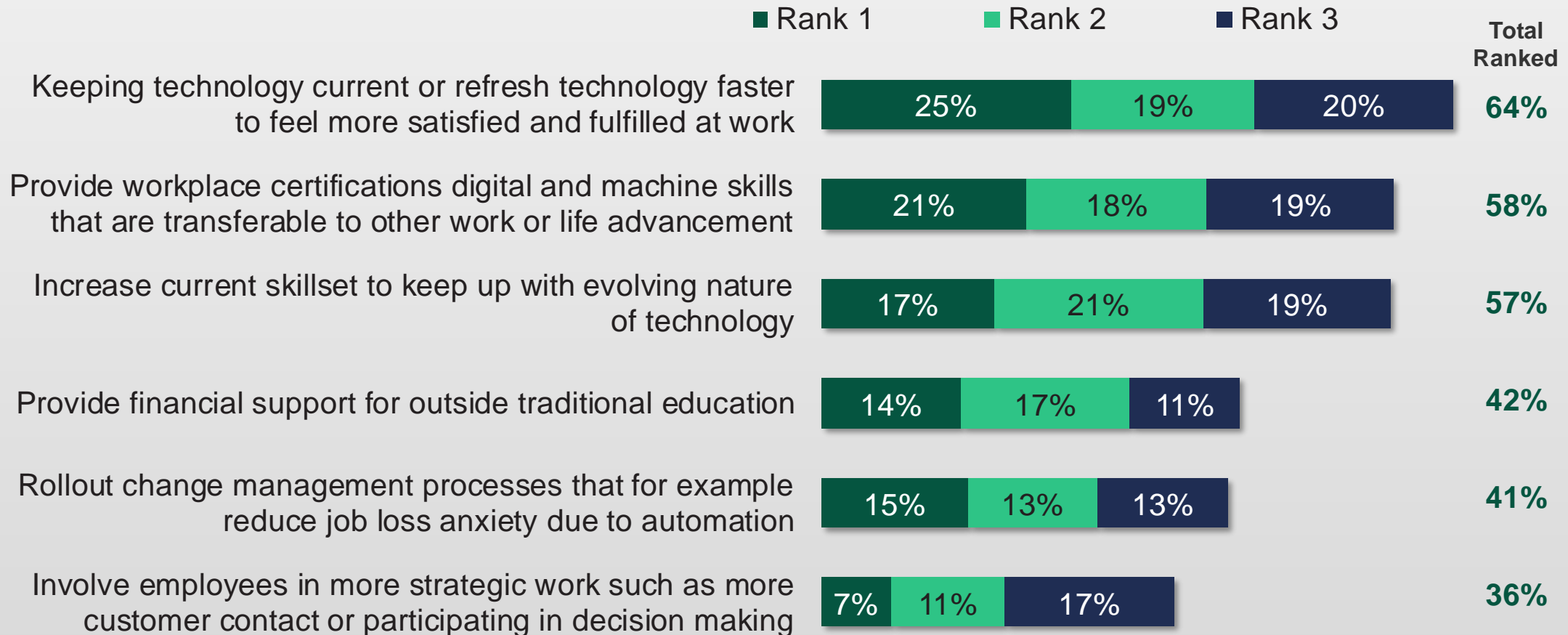
Q4. “How rapidly is the technology, due to advancing automation, being refreshed or altered that affects your workers e.g., enhanced digital skills, training or role definition?”



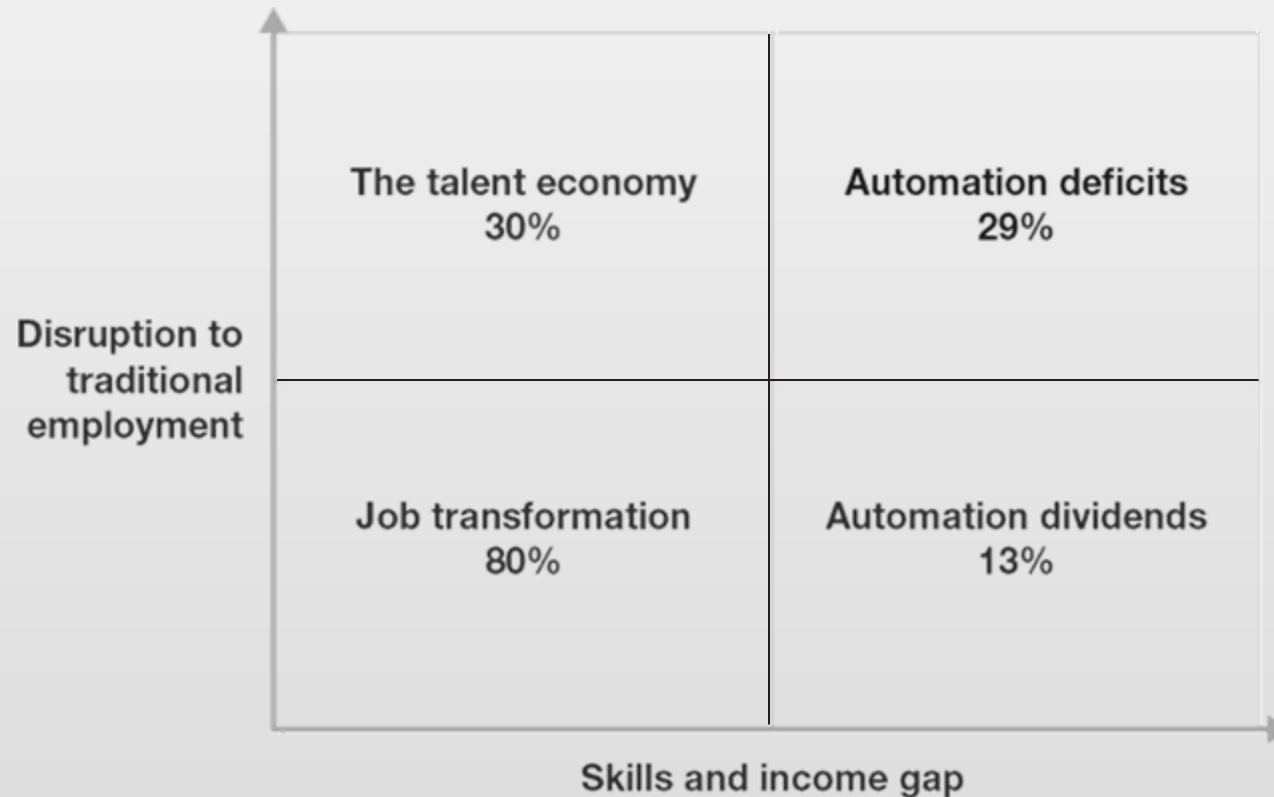
Job Transformation Will Be Inevitable

Some View This As A Good Thing, Others Consider It A Worrying Trend. Organizations Are Looking Into How They Can Cope

Q10. “Please indicate what would be the most successful activities within your organization to cope with the potential effects of automation and to improve the employee’s working experience?”



And Here's What We Think The Future Of Work Looks Like In 2030



Source: Forrester forecasts

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

Twelve Personas Can Describe The Workforce

Trend		Number of occupations	Number of US workers	Automation status
↑	Human-touch workers	76	15,196,250	Above the water line
↑	Cross-domain knowledge workers	92	9,668,290	Above the water line
↑	Teachers/explainers	64	8,844,680	Above the water line
↑	Digital elites	20	4,000,720	Above the water line
↓	Single-domain knowledge workers	41	5,533,780	Water is creeping up
↓	Physical workers	288	32,271,040	Water is creeping up
↓	Function-specific knowledge workers	50	6,357,980	Water is creeping up
↓	Location-based workers	70	29,937,620	Water is creeping up
↓	Coordinators	36	9,997,250	Under water soon
↓	Cubicle workers	72	20,676,290	Under water soon
↑	Mission-based workers*			Evacuees
↑	Digital outcasts*			Evacuees

130 Billion Of Value Released In 2022 Alone

Job category	Net 2022 job change	Hours (+/-)	Labor cost value(\$)
Gross-domain knowledge workers	118,755	-247,009,845	-24,700,984,538
Single-domain knowledge workers	-138,792	288,687,221	24,538,423,781
Function-specific knowledge workers	-156,654	325,839,502	17,921,172,587
Coordinators	-400,923	833,920,838	45,865,646,077
Cubicle workers	-914,469	1,902,095,500	66,573,342,502
			130,197,590,409

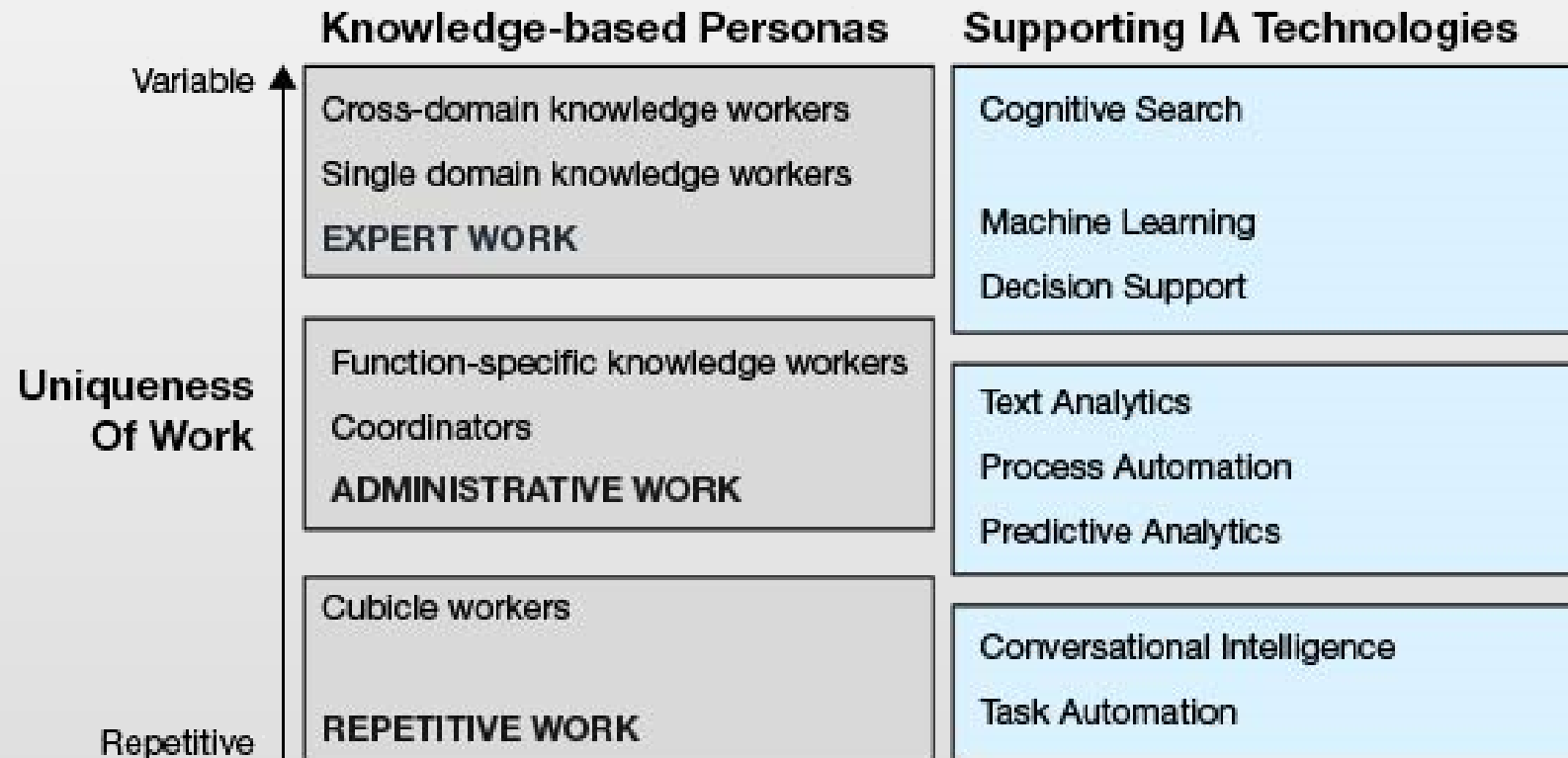
Note: Wage rates used for CDKW (100/hour), SDKW (85/hour), FSKW (55/hour), CW (35/hour)

Source: Future Jobs: Plan Your Workforce For Automation Dividends And Deficits

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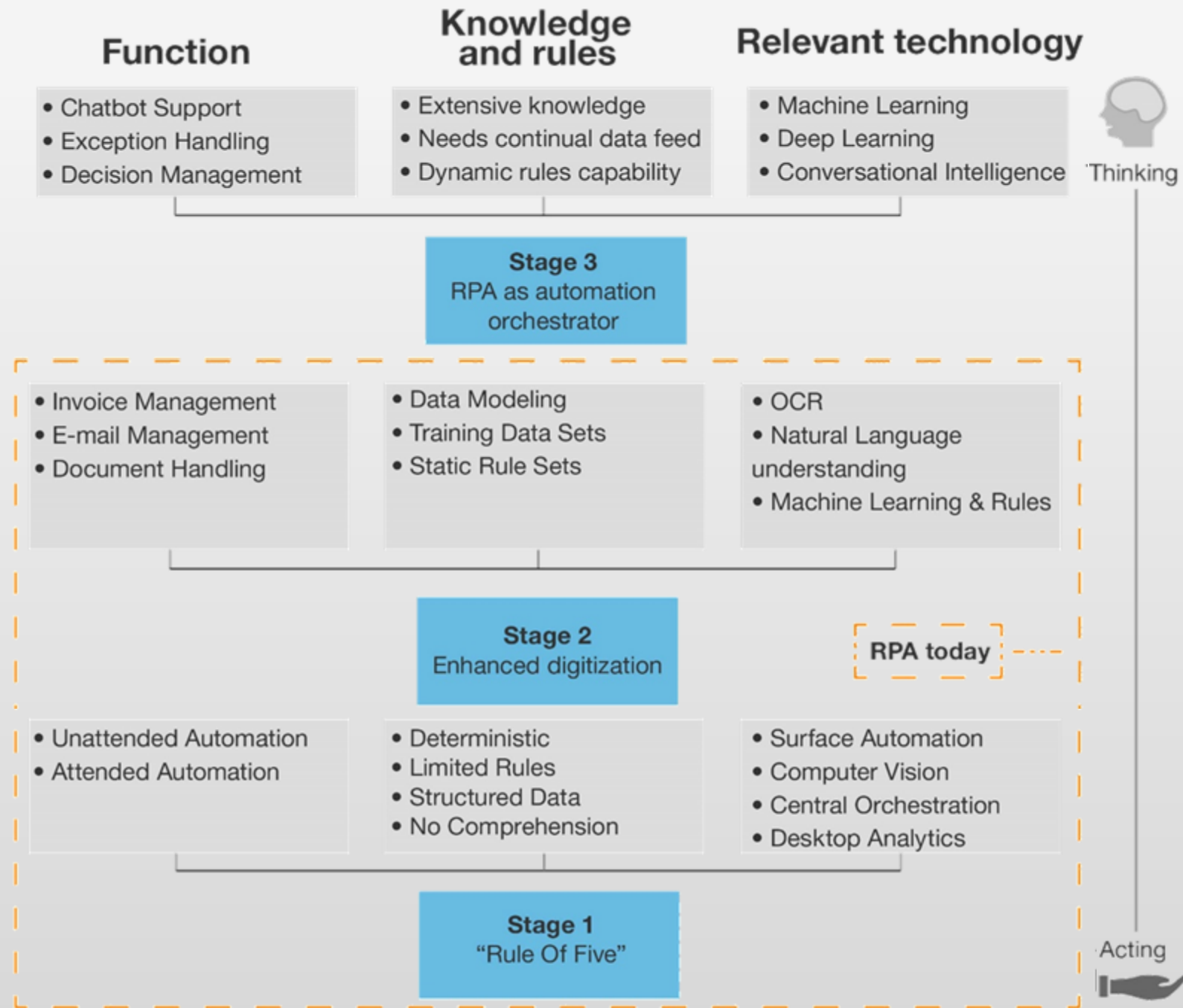
RPA Plus AI Affects Knowledge and Administrative Workers The Most



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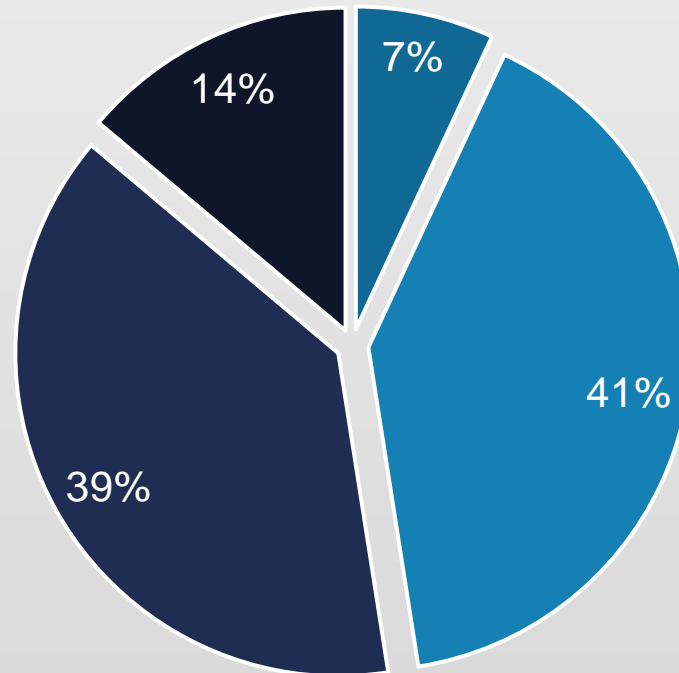
Pace Of IA Will Be Gradual



41% Are Slightly Concerned Existing Digital Skills Do Not Match The FOW Requirements.

Q11. “Please select the statement that best characterizes the attitude of your employees related to digital skills required?”

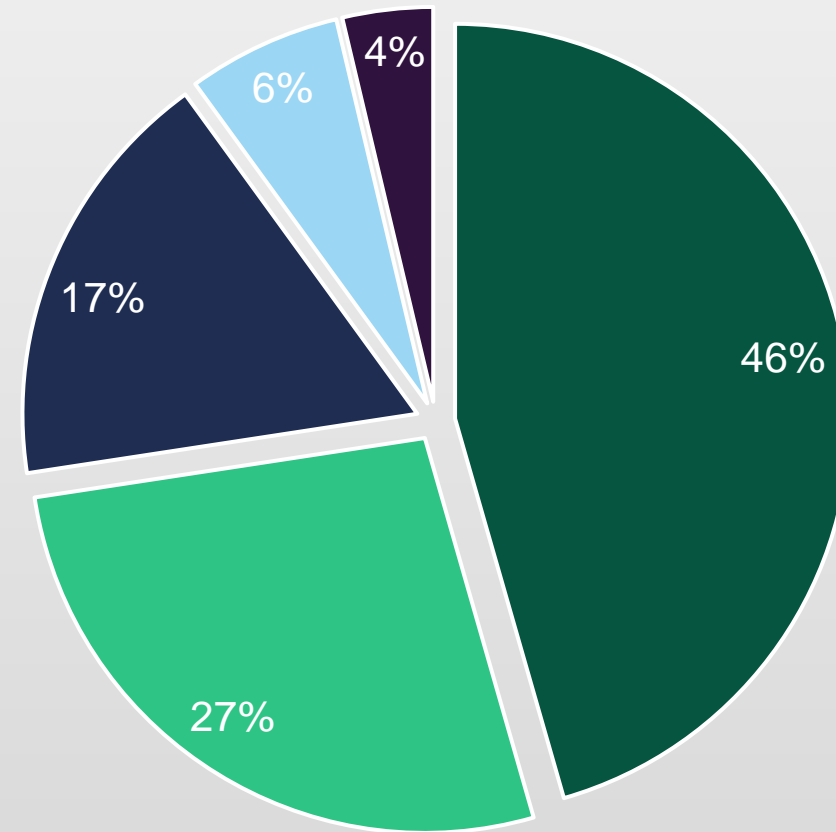
- They do not have any ambition to enhance their digital skills
- They are slightly concerned that their existing digital skills may not match what their job will require in the future
- They are concerned in their ability to succeed at their existing job but are not interested in advancing their digital skills
- They feel threatened with the growing complexity of the tasks they face now and will in the future



73% Of Firms Think Measuring Employee Anxiety Is Important

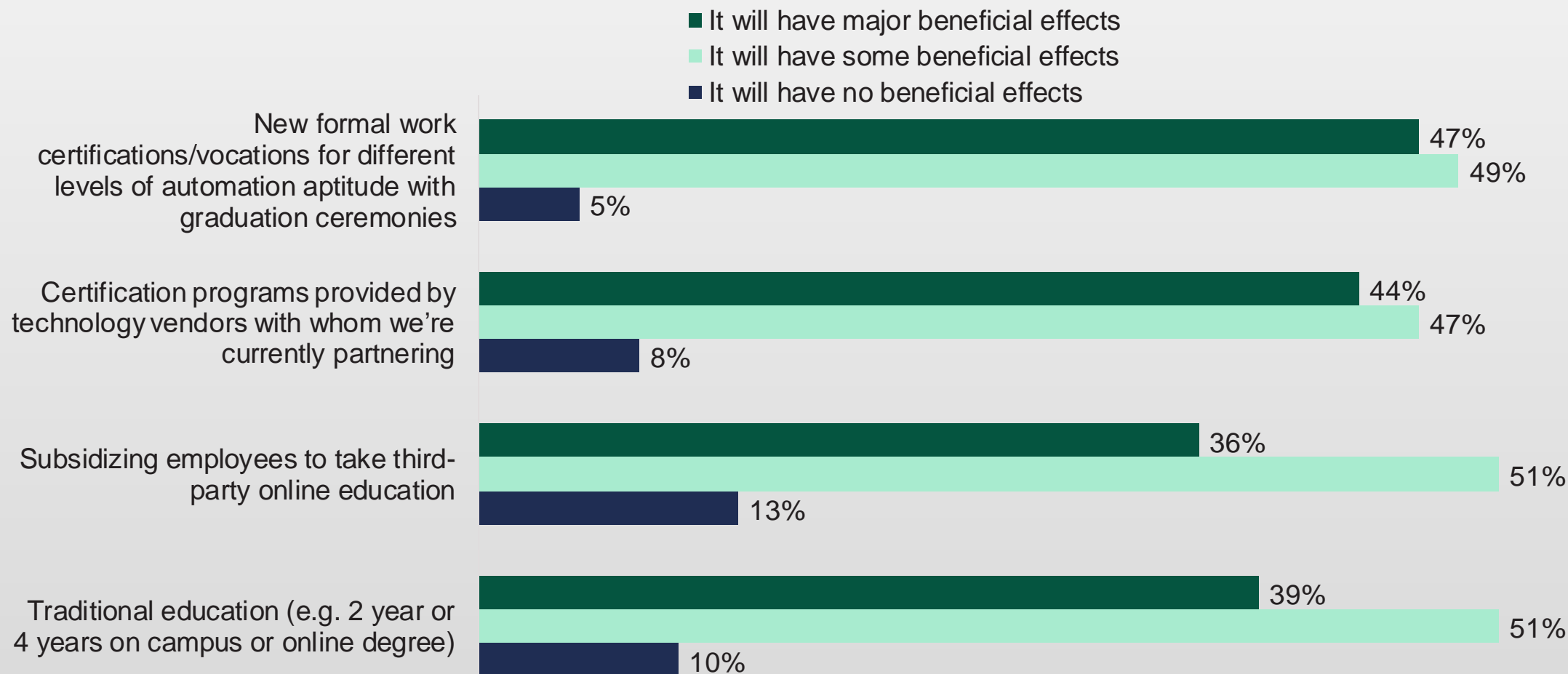
Q13. “What is your company’s approach to measuring/monitoring employee anxiety?”

- It is important and will become more so. Monitoring will enable us to approach employees differently
- We have no formal way to measure it and no programs or ideas on how to deal with it. But think it may be important in the future
- It’s critical to ensure we use the data to refine our change management processes
- It’s not required or on our radar at this point. We just don’t see it as a problem.
- It won’t make any difference. Employees will still feel anxiety/fear of job security



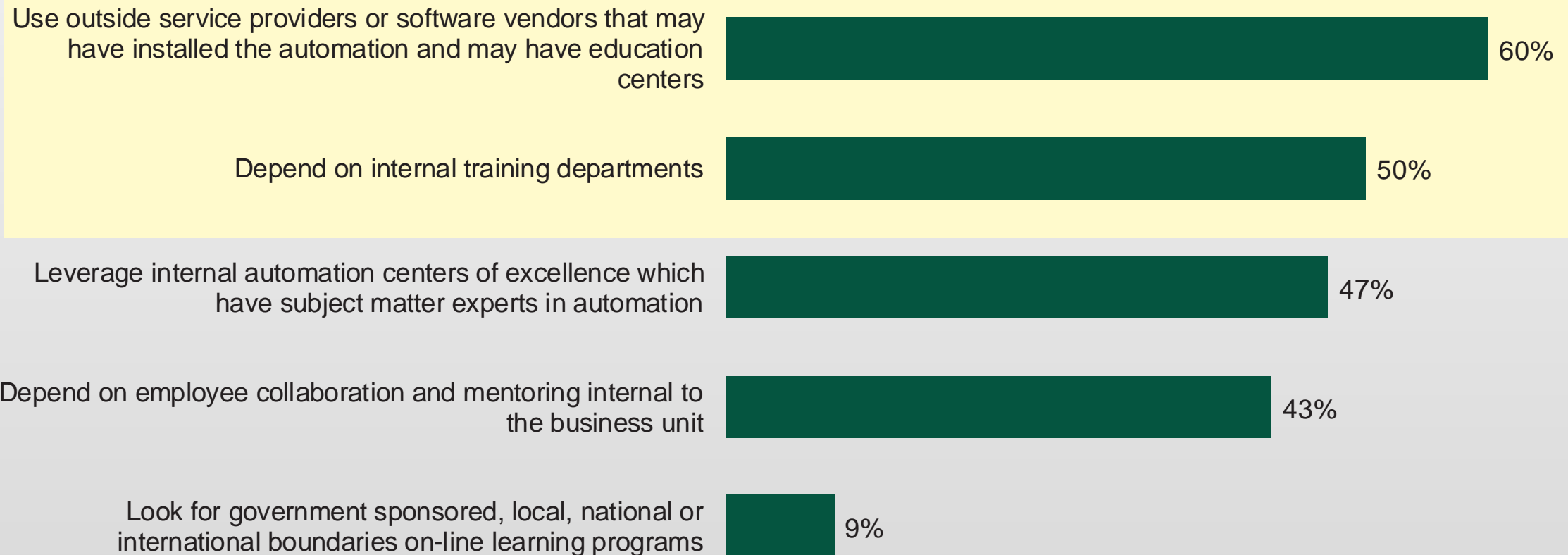
Reskilling, Training And Providing Employees With The Right Certifications/Vocations Will Lead To An Increase Of Automation Aptitude.

Q16. “Please rank the education approaches below in terms of how effective they are at dealing with previous workplace automation issues?”



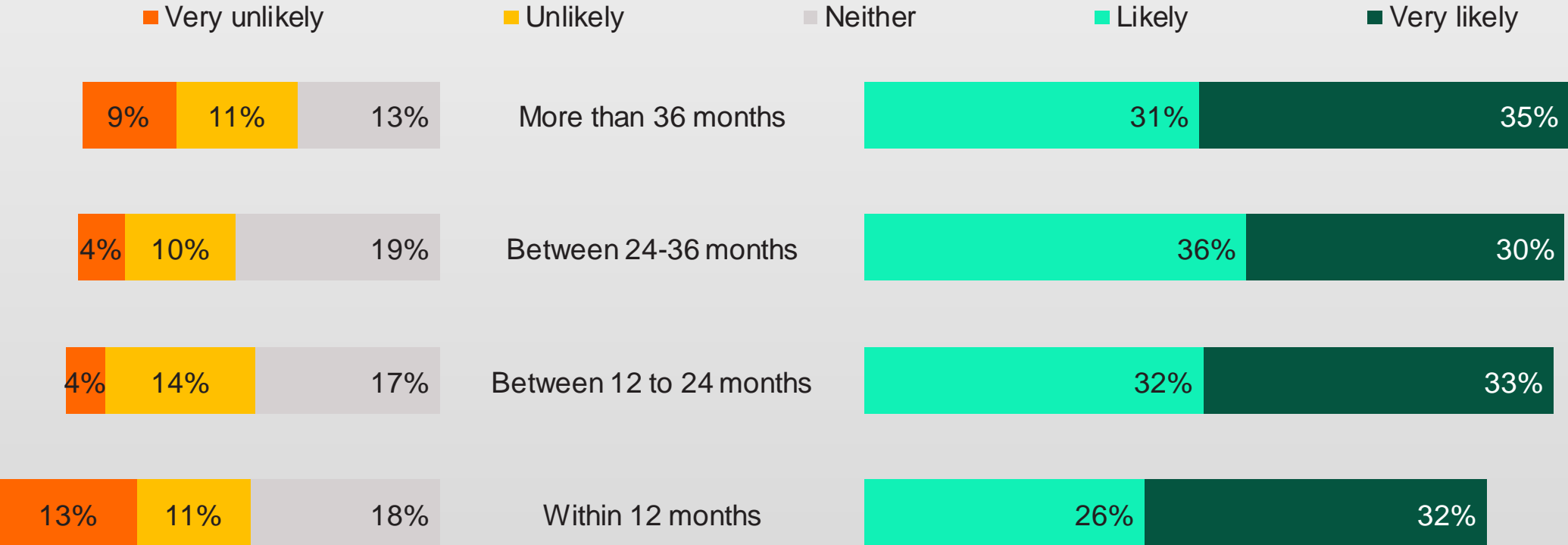
Internal Training And Outside Service Providers That May Have Installed Automation/Education Centers Will Help

Q14. “How does your organization plan to train existing employees or new employees for the new automation-focused roles?”

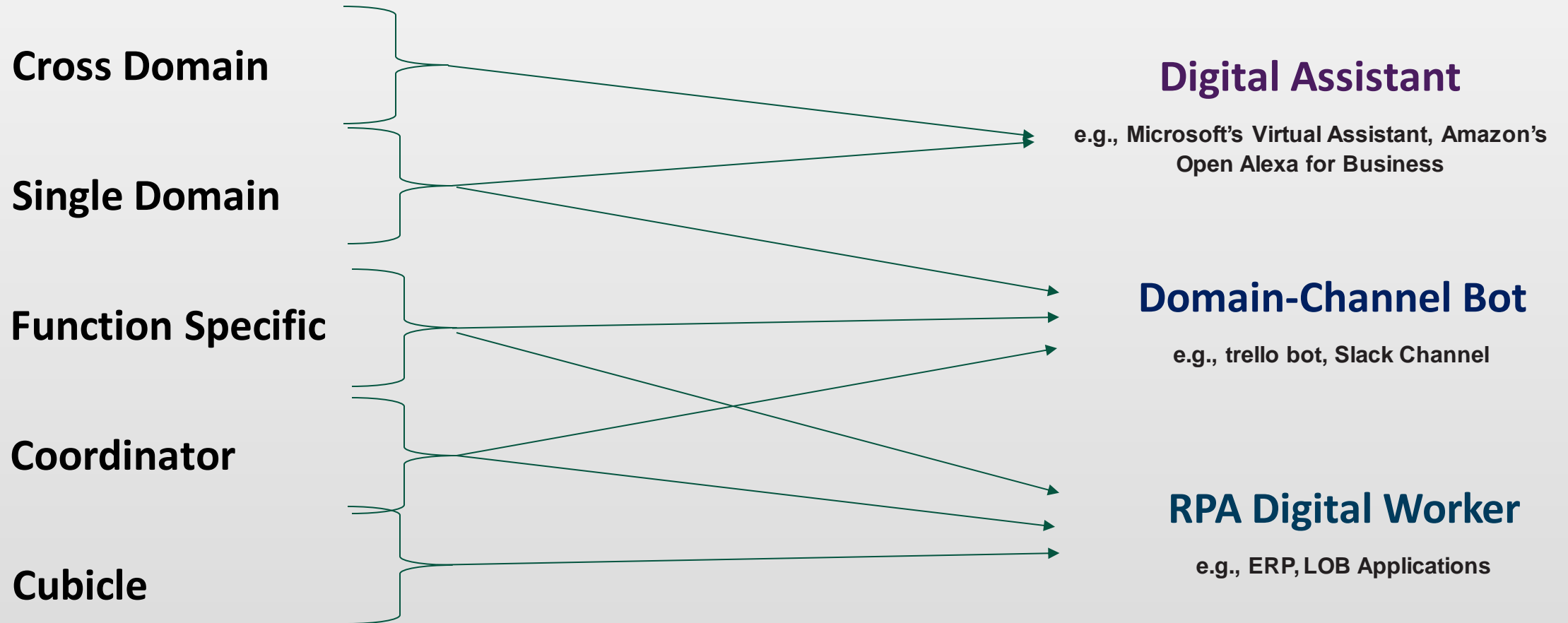


Personal Robots Are On Its Way Inbound Within The Next 3 Years

Q5. “Personal robots can help employees get work done in the same way RPA robots today do for background tasks. The difference is the ability for employees to enhance and train their own personal robots to support their unique work styles and patterns. At what point, if ever, do you see these being available?”



But Personas Will Use A Variety Of Personal Robots



Key Takeaways

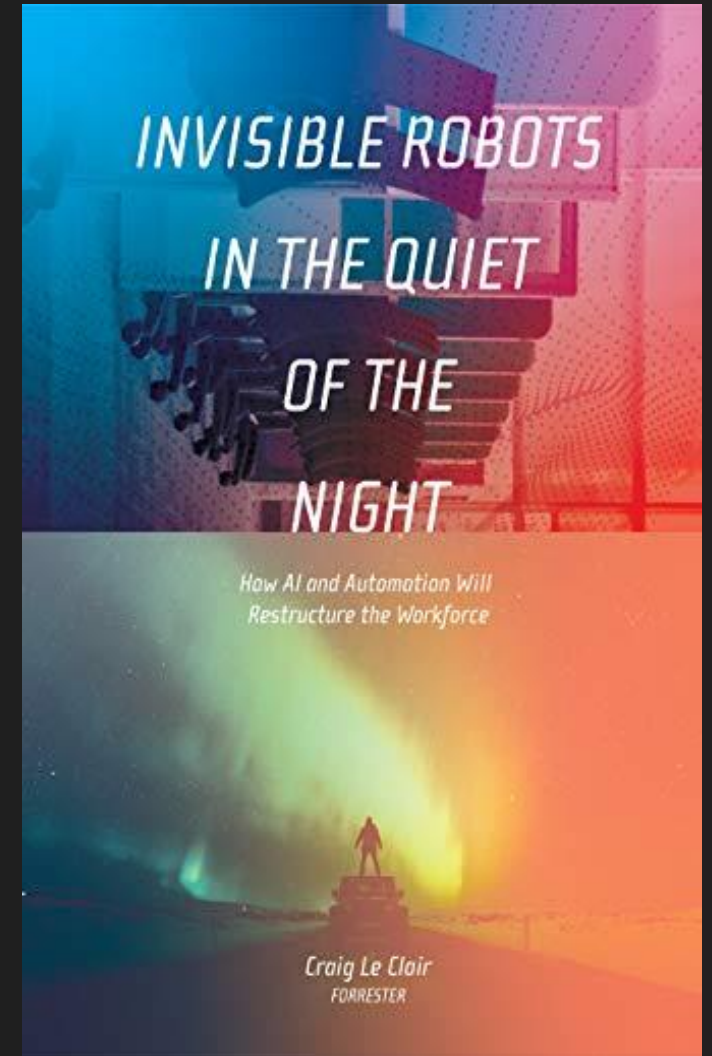
- Employees and organizations are more likely to embrace the influx of automation when they view the future of work a strategic competency
- The future of work is something you and your leaders will create. There is opportunity – and challenge – associated with it, but it's ultimately valuable.
- You can change the way you serve customers – for the better – by investing in the future of work.
 - HOW?
 - Plan a structural change in how you recruit, train, retain and manage workers.
 - Look to build new digital certification programs within but use partners to do so
 - Proactively address the 12 work personas

Thank you



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