

The State of AI-Powered Automation

Innovation, Impact, and the Future
Trends Shaping Enterprise Adoption

How AI is accelerating the
reconfiguration of the enterprise

by Ted Shelton & Ian Barkin

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Glossary

AI-Powered Automation

Enterprise software that continually discovers process improvements. It automates work with an AI-enabled digital workforce that collaborates with humans and operates at enterprise scale to accelerate productivity and business outcomes.

Generative AI

A subset of artificial intelligence models and techniques that are designed to generate new data samples (such as images, music, text, and videos) that are similar to or based on a given set of training data.

Robotic Process Automation (RPA)

A configurable software tool that uses business rules and sequences of actions to automatically complete processes in any number of different applications the same way a human would, with the help of people for exception management.

At a Glance

We are now 20 years into a reconfiguration of business, brought about by the rapid growth and attendant effects of inexpensive high-speed data networks, easily accessible global talent, and a dogged emphasis on process improvement and transformation.

Two decades later this opportunity to improve efficiency was re-energized by the appearance of Robotic Process Automation (RPA), for many the next method for improving productivity and reducing operating costs. However, the heights of anticipated impact were, at times, hard to attain—for reasons including lack of internal resources, incremental initiatives, and challenging legacy environments.

Encouragingly, the next generation of AI-powered automation, including generative AI, offers a shot of adrenaline to business roadmaps and reconfiguration goals of every enterprise, regardless of size and scope.

Over the past few months, as interest in generative AI has grown, Bain & Company conducted a series of executive interviews and a survey of 200 companies. Results showed that enthusiasm for a significant impact from AI-powered automation is high, but to achieve the even loftier aspirations for this wave of adoption, key lessons must be learned and applied.

- **Generative AI and other uses of AI-powered automation have quickly become the number one topic for the enterprise at every level.**
- **However, the ability to deploy this new automation technology is largely immature and only a small number of companies are using it to improve their business operations and create new value.**
- **A small number of companies are successfully applying AI-powered automation to improve their business operations and create new value in their markets.**
- **Our study identifies several key factors that separate high performers from the pack.**
- **A new AI-powered automation approach will favor early adopters as markets reconfigure.**



1

Reconfiguration

MIDJOURNEY Prompt-
reconfiguration, reconfigured, rearranged, abstraction, generative, processes, work, photograph-
ic, cinematic, wide shot, widescreen image, colour, color, cinematic, 35mm, wide angle lens, ultra
realistic, depth of field, tilt blur, 32k, super resolution, volumetric light + cinematic lighting,
color grading, editorial photography, incandescent, mood lighting, cinema lighting, studio light-
ing, ultra realistic, highly detailed, mode dynamic --ar 3:4

Each time an innovation is introduced into a market, new entrants alter the value equations in that market and take share from incumbents, who are challenged to change various aspects of their businesses in response. In past decades, these innovations have included the World Wide Web, social media, cloud computing, and smartphones.

Reconfiguration is a better word to describe and think about the change that occurs after the introduction of innovation.

Companies are compelled to adjust their position in an ecosystem, their price, and their provided value, as well as the structure through which they adapt to these new positions and offer these revised values.

1.1

The Role of Automation

Automation has long been a force for improvement and efficiency within organizations, evolving as the capabilities and processing powers of hardware and software allowed. Today, the enterprise has a powerful portfolio of tools available to support a comprehensive reconfiguration of businesses and business models.

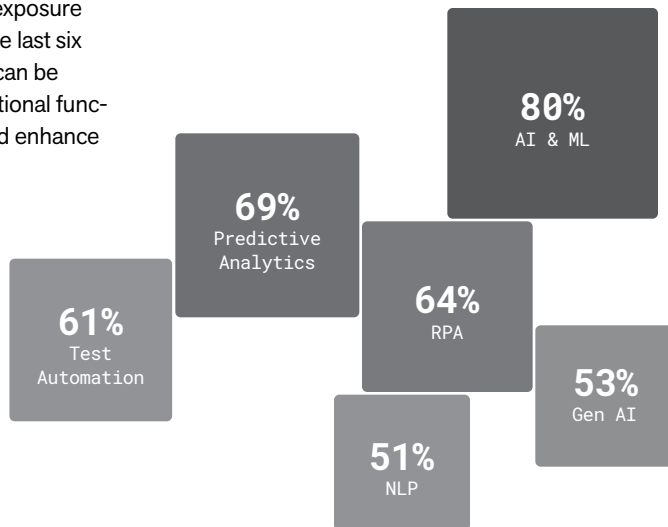
Findings from Bain's survey of representatives from 200 enterprises (most with more than \$5 billion in revenue) showed that most organizations have deployed a suite of automation technologies, including **AI and machine learning** (ML; 80%), **RPA** (64%), and **predictive analytics** (69%). In addition, many organizations use **test automation** (61%) and **natural language processing** (51%). Surprisingly, over half (53%) of respondents report having adopted some level of **generative AI**.

These percentages reflect the exposure generative AI has received in the last six months, the ease with which it can be piloted across numerous operational functions, and the ability to scale and enhance operations quickly.

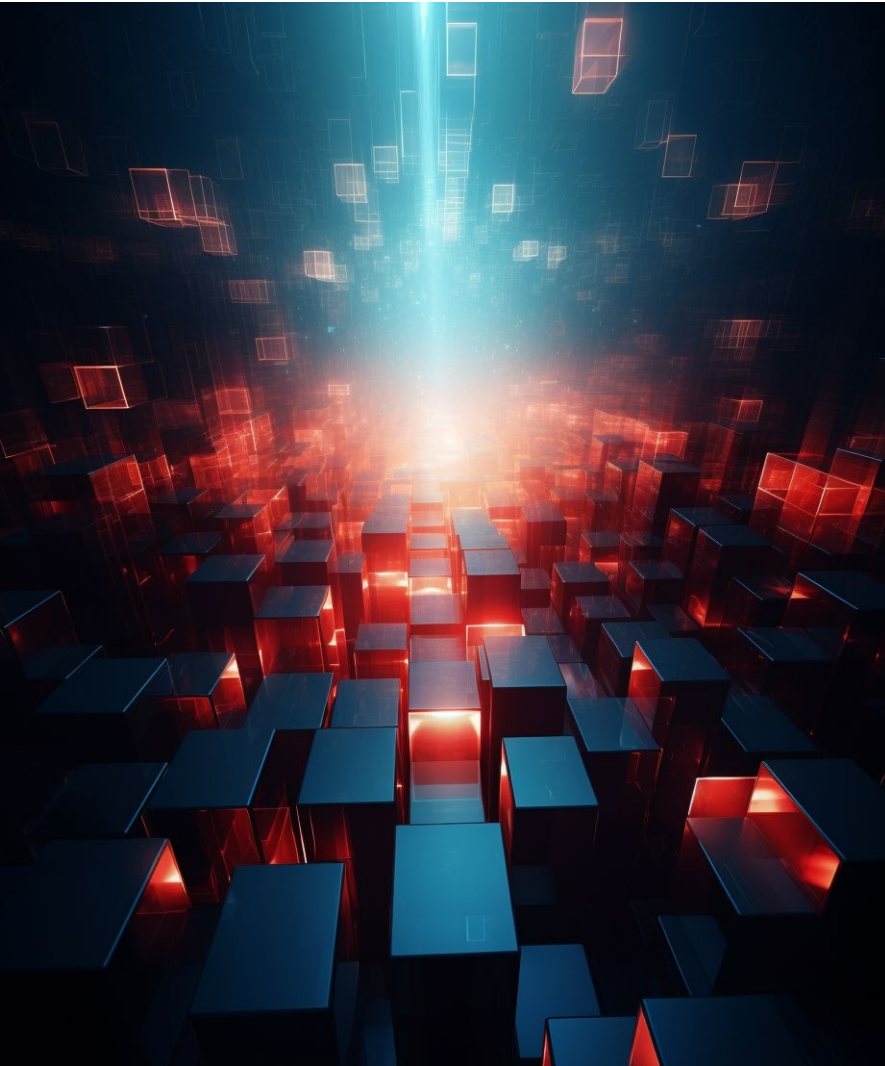
Adoption levels, however, are quite uneven across these large enterprises. Although nearly 60% of respondents report investing over \$500,000 to date, and a significant number (20%) of organizations have spent between \$1 million and \$5 million, these investment levels are quite low compared to the overall scale of these enterprises.

In a small number of cases the executives we interviewed report investing many times these amounts and achieving substantial scale to their financial and operational results, with one executive boasting a yearly budget of \$35 million and \$1 billion in run rate value already delivered from past and current initiatives.

Automation Technology Deployed



based on 200 enterprises surveyed



Confirming other Bain research, survey findings showed that efficiency and productivity (85%) have been motivating factors in automation adoption, followed by cost reduction (35%). And although many enterprises have focused on end-to-end transformation, the findings suggest that these respondents have been more grounded in operational improvements than in the pursuit of aspirational future states, with only 29% reporting that they are motivated to adopt automation to “accelerate innovation” and “business transformation.”

A few enterprise functions continue to lead the way, adopting automation earlier than others and more aggressively. **IT services and support** is the undisputed leader, with 79% of these departments indicating use of automation. **Customer service** (58%) and **finance and accounting** (53%) departments are also significant users. **Legal and compliance** departments had the lowest deployment rate at 21%.

Results also showed enterprises used automation in middle and front-office functions, including patient registrations in healthcare and call center prescreening in customer care environments. Each discrete application brings value and, in doing so, inspires broader adoption across a given enterprise.

1.2

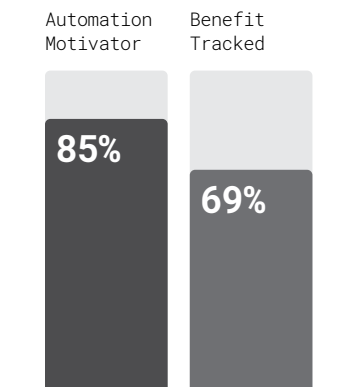
Value From Automation

The pursuit of positive ROI has launched many automation initiatives. However, Bain research findings suggest that tracking those returns, and even achieving the returns originally sought, have proven less common—although hopes are high for more AI-powered automation to create greater, and more measurable, impacts in the future.

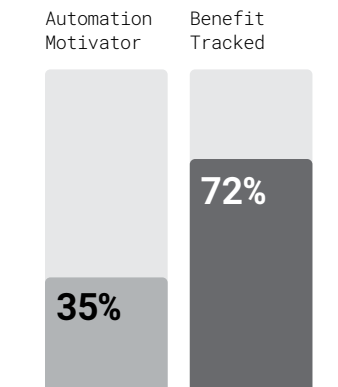
In our survey, 85% of respondents chose efficiency and productivity as key motivators for automation, far outranking any other objective. Encouragingly, “increased efficiency and productivity” also ranked first (by 69% of respondents) as the benefit most realized, followed by improved accuracy and reduced errors (56%).

Interestingly, these motivators were not the key areas being tracked. When asked how enterprises track the impacts of automation, cost savings (72%) reigned supreme. A close second was time savings (70%), which is arguably an extension of the cost savings, given the veracity of the adage “time is money.” Enterprises probably track these factors because other impacts—such as improved customer experience, employee satisfaction, and top-line revenue growth—are harder to isolate and measure.

Efficiency & Productivity



Cost Savings





Respondents whose companies exhibited the most mature automation deployments were clear that their achievement of scaled adoption was directly tied to defined measurement, tracking, and reporting around value generated.

One executive, able to claim a cumulative \$1 billion in value delivered to the business over the past five years, said,

“We have a value framework for automation and AI that outlines value drivers the business cares about.

Much is centered around making things a little more efficient. A little better.

Every project we do, we outline which value drivers it's going to affect, and the KPIs to measure the outcome.”

1.3

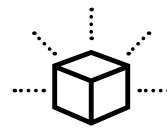
Value Anticipated Through AI-Powered Automation

The anticipated potential of AI-powered automation for the modern enterprise landscape is becoming increasingly evident. Seventy percent of respondents underscored its significance, asserting that AI-driven automation is either “very important” or “critical” for the future of their industry. This sentiment is further bolstered by the optimistic financial outlook of business automation shared by the majority—74% anticipate a positive ROI from their automation endeavors.

Delving deeper into the specific technologies poised to usher in this revolution, a significant 56% pinpoint AI and Machine Learning (ML) as tools that will make the most profound impact. A noteworthy 45% forecast that the integration of automation and AI will catalyze a major transformation in their industry within the next few years.

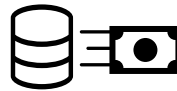
Beyond using AI-powered automation for operational enhancements, respondents intend to use it to create novel business opportunities. Respondents envisage a future where this technology enables **new product** or service offerings (58%), creates avenues for **data monetization** (52%), allows for heightened **personalization** in offerings (47%), and even paves the way to tap into previously **uncharted markets or customer segments** (26%).

Opportunities for AI



58%

New Product



52%

Data Monetization



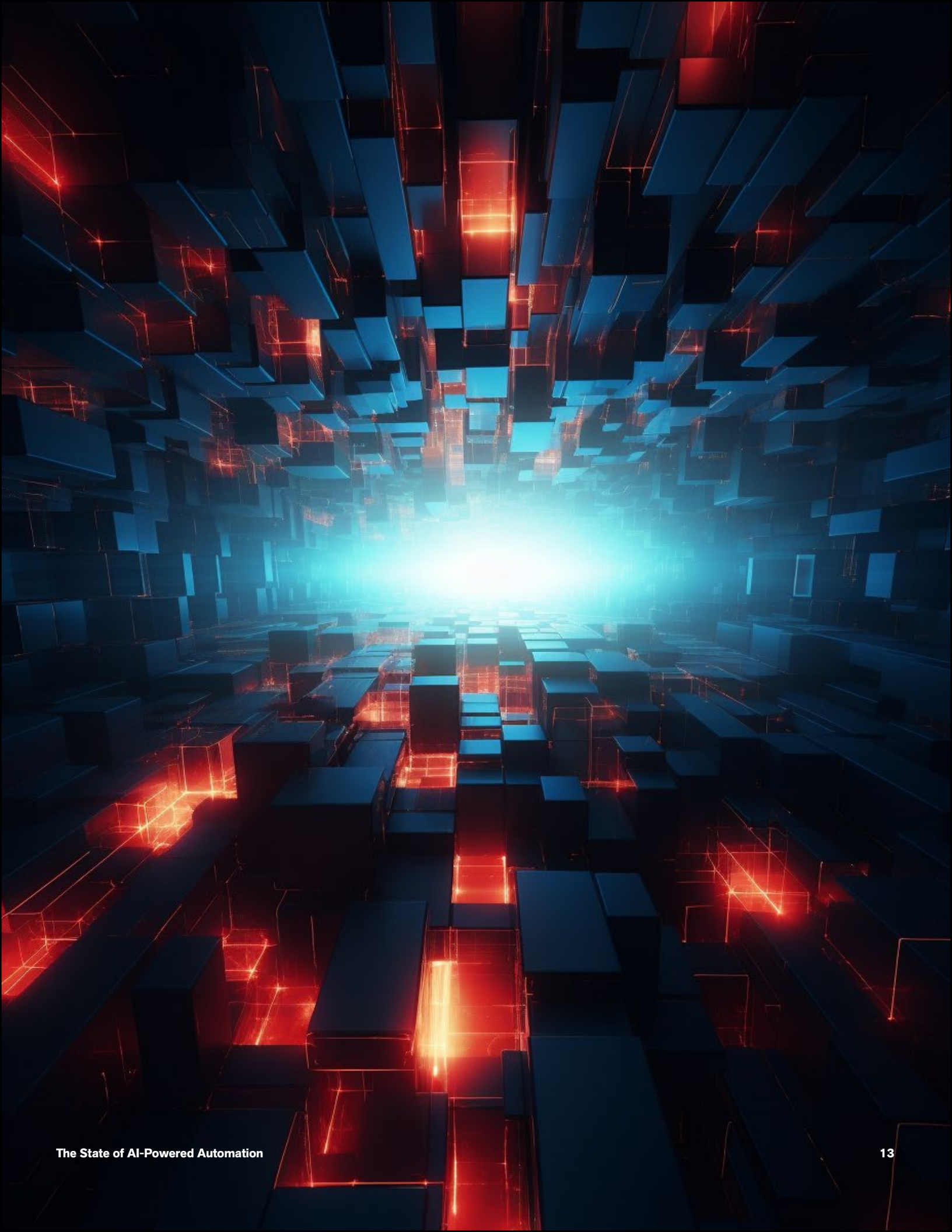
47%

Personalization



26%

New Segments



1.4

Emergence of Generative AI

It's impossible to ignore the impact that generative AI has had since exploding onto the scene seemingly only a few months ago. Beyond simply capturing the imagination and rejuvenating the enthusiasm for AI investments, generative AI has accelerated all forms of automation adoption. As stated by one executive,

“Generative AI is going to redefine a lot of business processes and how businesses operate. It's stunning what I am seeing as a tech practitioner in this space. And it's about time.”

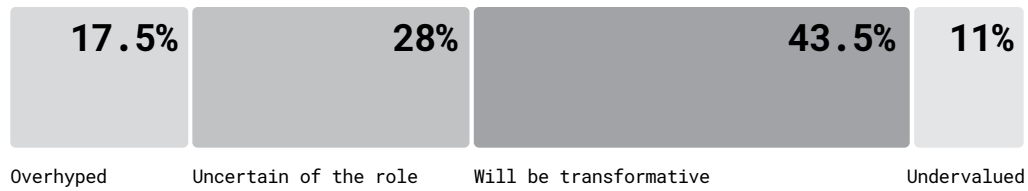
Over half of the organizations we surveyed have started adopting generative AI. As might be expected, most have done so only in a limited capacity, showing cautious enthusiasm as they seek to balance new capabilities with the real and present security and compliance considerations that will accompany any larger-scale adoption. A few early pioneers (2%) report fully embracing generative AI as a core component of their operations. However, these companies were outliers, as even the most mature enterprises report earlier stage, more measured, pilots and proofs of concept to date.

A leading use case for significant value is emerging in customer service applications, where generative AI is augmenting—or, in some cases, emulating—call center staff. Some in the business process outsourcing industry have long feared full replacement by AI, but that is a reality the industry has never truly had to face until now. Supporting this apprehension, one executive stated that AI technology enabled their organization to bring an outsourced customer service function back in-house, showcasing the matter as a positive AI impact on the business.

Nearly half of executives (46%) intend to use generative AI for data synthesis and augmentation, 44% plan to use it to enhance creative processes, 32% see potential for automating business processes, and 30% plan to leverage generative AI to drive innovation in their operations.

“Where RPA originally came in with the promise of a reduction in effort required for a narrow set of tasks,” one executive told us, “Generative AI substantially expands automation potential across processes—with its ability to do sentiment analysis and higher-order automation, it can automate the thinking level for the first time.”

Transformational Impact of Generative AI



Bain research found 43.5% of respondents stated that generative AI will be transformative. Interestingly, there are uneven opinions on the current valuation and hype around generative AI, with 11% thinking it is undervalued and 17.5% asserting that it is overhyped. A noteworthy number of respondents (28%) take a more cautious stance, reporting that they are still uncertain about the role of generative AI.

What does seem certain is that generative AI is supercharging the AI-powered set of tools that make up what one executive called the **“generative AI schematic,”** referring to the broader set of capabilities necessary to analyze, understand, and execute work processes across an enterprise.

These AI-enabled solutions represent a significant evolution from the traditional RPA tools that jump-started many automation initiatives. Nearly half (48%) of those surveyed perceive a higher impact when using AI-enabled solutions, they expect that impact to accelerate.

Asked to look ahead at the perceived effects of AI, respondents said they believe AI will have the biggest impact accelerating business processes and achieving faster execution (53%). Other perceived effects of AI included increased handling of intricate business processes (50%), better quality data (40%), greater R&D support (37%), product development support (37%), and market research support (28%).

2

The Stalled vs. The Stars

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abstraction, generative, processes, fast vs. slow, stars, movement, racing to space, abstract,
work, photographic, cinematic, wide shot, widescreen image, colour, color, cinematic, 35mm, wide
angle lens, ultra realistic, depth of field, tilt blur, 32k, super resolution, volumetric light
+ cinematic lighting, color grading, editorial photography, incandescent, mood lighting, cinema
lighting, studio lighting, ultra realistic, highly detailed, mode dynamic --ar 3:4

It seems clear that AI-powered automation, including generative AI, will drive a larger wedge between those organizations that have a plan and those that don't—amplifying advantage and placing early adopters into stronger positions during the coming market reconfiguration.

Bain research identified five behaviors that most correlate with enterprises that are leading their peers in both the scale of their adoption and the positive impact experienced by their organizations—behaviors that, when not followed, help explain stalled efforts at enterprises that report lower ROI on digital investments and transformation.

2.1

Key Lessons for Success

ONE

Business-led Process Improvement



In the quest for mature and value-adding automation programs, the rudder must be in the hands of business stakeholders—the process owners and subject matter experts across any organization.

Their insights into operations, nuanced understanding of customer needs, and intimate familiarity with internal processes are unparalleled.

Automation devoid of this expertise is akin to a ship without a compass.

For success and scale, it's imperative that these experts and knowledge workers lead the charge. This will ensure that automation efforts are not only technologically sound but also intricately aligned with the business' unique operational fabric and objectives.

TWO

Value Creation Planning



Success at enterprise automation is not merely defined by adoption but by meaningful integration at scale.

Central to this is a robust value framework delineating critical value incentives (such as opex, revenue growth, and total cost of care) and spotlighting key incentives that align with business priorities.

Before any project commences, firms must identify the value incentives the project will impact, the KPIs for outcome measurement, and a clearly defined timeline.

Notably, a rigorous validation process (often with a financial controller's endorsement) is recommended. Taking these actions, enterprises ensure that automation efforts are not just prolific but also profoundly important.

Indeed, having a value framework, and the rigor it demands, serves as the cornerstone for automation's potential at scale.

THREE

Sponsorship From the Top



Executive sponsorship is absolutely critical to successful enterprise automation. This component does not suggest that inspiration or strategic vision has to come from the top—it's often the operations team that knows best what is needed.

But without unwavering support and advocacy from top-tier leadership, initiatives will struggle to secure requisite resources and necessary momentum and direction.

An executive sponsor champions the cause, navigating potential roadblocks, securing cross-departmental collaboration, and ensuring sustained commitment throughout the automation journey.

In essence, while the tools and techniques of automation are vital, it's the weight of executive sponsorship that truly galvanizes an organization toward its full potential.

FOUR

Pragmatic Budget Reallocation

ROI stands as a critical component in the automation strategy of forward-thinking enterprises. Although automation promises efficiency gains, the true realization of its financial benefits often hinges on subsequent strategic actions.

As automation streamlines processes and reduces manual interventions, organizations have the dual opportunity of optimizing operational costs and reallocating funds to innovation and growth initiatives. However, these opportunities necessitate decisions, including workforce configuration.

As automation technologies replace the need for people in some tasks and processes, organizations must urgently examine where people do add value and how to reskill an existing workforce for different activities.

FIVE

Sincere Change Management

Change is at the heart of automation and enterprise reconfiguration. While technology provides the tools, it's the people who breathe life into these initiatives—or stop them in their tracks.

As organizations evolve, employees face the uncertainties of new systems, altered job roles, and shifting responsibilities.

Effective change management addresses these concerns head-on, facilitating understanding, fostering adaptability, and building collective ownership of the new direction.

In an era of rapid technological advancements, the true differentiator for successful organizations is their ability to manage change holistically, ensuring that every stakeholder is aligned, empowered, and invested in seeing automation projects through to completion.

Executive interviews reveal that leaders in the field of automation adoption exhibit each of the preceding behaviors to some degree or another.

In contrast, firms that report still being in the stages of piloting, investigation, tool selection, vendor selection, or any number of other nascent and immature stages lack many (if not all) of the elements listed previously.

Those enterprises may find their competitive positions to be tenuous at best and may have dire prospects if reconfiguration is not their top strategic priority.

3

The Road Ahead

MIDJOURNEY Prompt-
abstraction, generative, processes, road forward, movement, traveling, abstract, work, photographic, cinematic, wide shot, widescreen image, colour, color, cinematic, 35mm, wide angle lens, ultra realistic, depth of field, tilt blur, 32k, super resolution, volumetric light + cinematic lighting, color grading, editorial photography, incandescent, mood lighting, cinema lighting, studio lighting, ultra realistic, highly detailed, mode dynamic --ar 3:4

In considering any new subject,
there is frequently a tendency,

First, to overrate what we find
to be already interesting
or remarkable; and,

Secondly, by a sort of natural reaction,
to undervalue the true state of the case,
when we do discover
that our notions have surpassed
those that were really tenable.

—Ada Lovelace (1843)

3.1

The Human Element

As companies consider their path to adopting AI-powered automation, supporting employees constitutes an important element in that journey. In our survey, 68% of respondents emphasize the importance of fostering a culture of innovation and continuous learning. Close behind was a focus on strong leadership and strategic vision (49%), robust technical and data prowess (45%), and adept change management coupled with stakeholder engagement (42%). A combination of these elements will be key to successful adoption.

The gap in current enterprise readiness is clear. Over 50% of respondents highlight a “lack of internal expertise or knowledge” as their most significant impediment, underscoring the crucial role of human resource development. In response, organizations are championing a two-pronged approach.

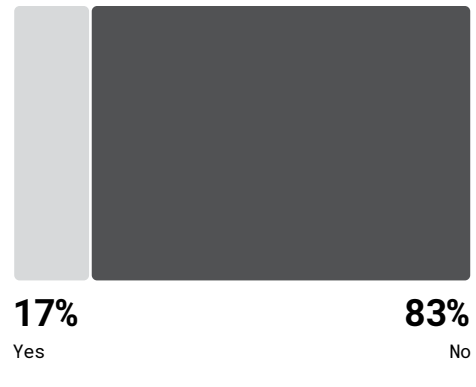
Internally, they focus on extensive employee engagement and education about emerging technologies, ensuring that the workforce is not just abreast of new knowledge but ahead of the technological curve.

Externally, strategic collaborations with vendors have evolved. Vendors are no longer mere technology facilitators; they serve as strategic partners that are instrumental in enabling the transition.

As for the fate of the worker, 56% of organizations anticipate no workforce reductions. Instead, automation has been a catalyst, prompting role evolutions to harness operational capacity and steer employees toward tasks that add greater value. That said, 33% foresee some workforce reduction, including halting new hiring. Interestingly, 8% have ramped up hiring post-automation, a testament to the new horizons and business avenues automation has unveiled, demanding fresh human expertise.



Are you concerned AI could make your role obsolete in the next five (5) years?



Reconfiguration of the workforce will be a component of successful programs, but the human element will remain at the heart of the enterprise, even in an era dominated by AI and automation.

Although technology advances, it's the synergy between human ingenuity and machine efficiency that will define the enterprises of tomorrow, augmenting people so they work faster, smarter, with greater accuracy, and, ultimately, in a manner that is more fulfilling.

3.2

Future Business Objectives

The imperative of having AI-powered automation in enterprises is becoming increasingly well defined. The survey data reveals a strong inclination toward harnessing AI-powered automation to drive organizational objectives of all types, from cost reduction to competitive relevance.

One standout theme from the Bain analysis is the role of a structured value framework. This framework, anchored in defining and aligning with key value incentives, serves as a compass, ensuring that automation initiatives enable broader business goals. The emphasis on true cost reduction emerges as a foundational objective.

To unlock the efficiencies promised by automation, strategic decisions, especially those related to reconfiguring organizations, will be necessary.

However, the findings show that organizations are transcending operational metrics and diving into the transformative spirit of automation.

The effort constitutes more than just deploying technology; it requires a fundamental shift in enterprise architecture, a reconfiguration of business models and operating models alike.

Do you believe AI will radically change how businesses operate in the next five (5) years?



79%
Yes

21%
No



The truly future-proof organizations will be agile, with a fluid culture and design, constantly evolving, and reconfiguring in tandem with technological advancements (whether it be generative AI or the next AI-powered trend) and market dynamics.

To effectively capitalize on the business advantages of AI-powered automation, including generative AI, large enterprises must take the following specific actions:

1 Establish a Structured Value Framework



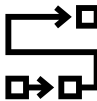
Identify Key Value Incentives

Establish a structured value framework that clearly identifies the key value incentives in the organization, such as cost reduction, increased efficiency, and customer satisfaction.

Align Objectives

Ensure that the framework serves as a compass by aligning objectives and helping executives understand how AI and automation initiatives will fulfill broader organizational goals.

2 Focus on Cost Efficiency



Strategic Workforce Planning

Recognize that achieving true cost reduction will necessitate strategic decisions, particularly around headcount adjustments. This reconfiguration must include a balanced discussion of how to best invest in people and how the talent strategy will change.

Optimize Business Processes

Technology is one component of a business process improvement initiative. Deploy AI-powered automation tools to streamline business processes and thereby reduce manual labor and associated costs. But also examine the end-to-end processes and seek to eliminate activities that create complexity in the first place.

3 Transform Enterprise Architecture



Reconfigure Business Models

Go beyond merely deploying technology by fundamentally rethinking and redesigning business models to integrate AI and automation seamlessly. How do these new capabilities change what your company can deliver as a value proposition to your customers?

Adapt Operating Models

Revamp operating procedures to accommodate new technologies, ensuring that the organization remains agile and responsive to technological advancements. Think through the role of augmentation in changing how employees and their managers work together with technology.

4 Build Agility and Fluidity into Organizational Culture



Cultivate Culture of Continuous Learning

Foster a culture that not only adapts to new technologies but actively champions them. Educate your employees on new ways of working and provide rewards and recognition for those who successfully adopt AI and automation into their work.

Design for Evolution

Build a fluid organizational design that can evolve in tandem with market dynamics and technological advancements like generative AI. Investment and agility will be key to using these technologies to amplify your company's market advantage. Continuous change in what is possible will require continuous change in how your company participates in that change.

5 Chart a Clear Roadmap



Digital-First Business Models

Review every technology investment and determine which of these initiatives will be disrupted by the continuing evolution of automation and AI. Prioritize investment in new capabilities by deciding which activities to start, stop, or continue to support a digital-first business model across every aspect of your company's operations.

Create Workforce Strategies

Complement cost-efficiency goals with judicious workforce strategies that capitalize on the capabilities of AI and automation. Develop a predictive model to understand where you have more people than you will need in the future and put plans in place to start migrating them to other tasks or functions. Update current talent strategies to address the coming changes in the work environment across recruiting, compensation, retention, and learning and development.

6 Enhance Customer Satisfaction

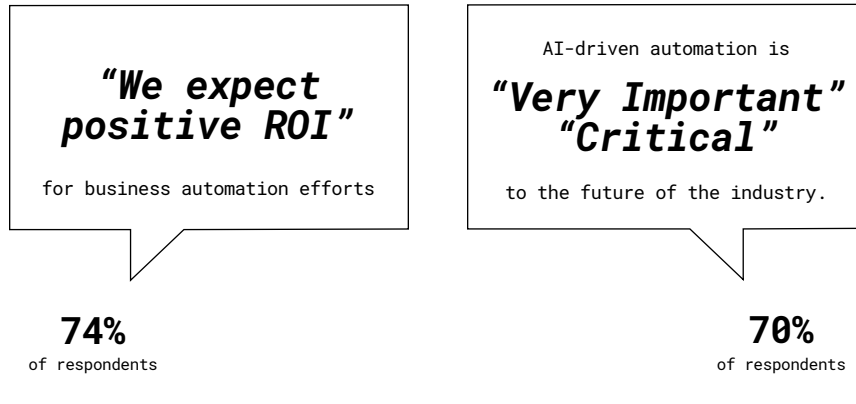


Personalize Customer Interactions

Create comprehensive perspectives on your customer interactions and use AI algorithms to personalize customer experiences, thereby increasing satisfaction and loyalty.

Automate Customer Support

Anticipate that the volume of customer interactions will increase as you decrease the cost of each interaction through the implementation of generative AI-powered chatbots and automated customer service solutions to provide quicker and more efficient support.



By taking these specific actions, enterprises can not only navigate but also thrive in a future that is increasingly driven by AI-powered automation.

The road ahead for enterprises in the realm of AI at work, powered by automation, should be full of clear signposts. Among that guidance is advice to architect compelling business models apt for a digital era, ground initiatives in a rock-solid value framework, strive for genuine cost efficiencies complemented by judicious workforce strategies, and above all, foster a culture that doesn't just adapt to but champions the ethos of reconfiguration.

This holistic approach holds the promise of not just navigating but thriving in the AI-powered, automation-led future.



MIDJOURNEY Prompt-

holistic approach promise navigating thriving AI-powered, automation-led future, abstraction, generative, processes, road forward, movement, traveling, abstract, work, photographic, cinematic, wide shot, widescreen image, colour, color, cinematic, 35mm, wide angle lens, ultra realistic, depth of field, tilt blur, 32k, super resolution, volumetric light cinematic lighting, color grading, editorial photography, incandescent, mood lighting, cinema lighting, studio lighting, ultra realistic, highly detailed, mode dynamic --ar 3:4

Interview and Survey Results

Survey conducted: **August 2023**

Total companies surveyed: **200**

All industries with primary categories:

Financial services

Technology and cloud services

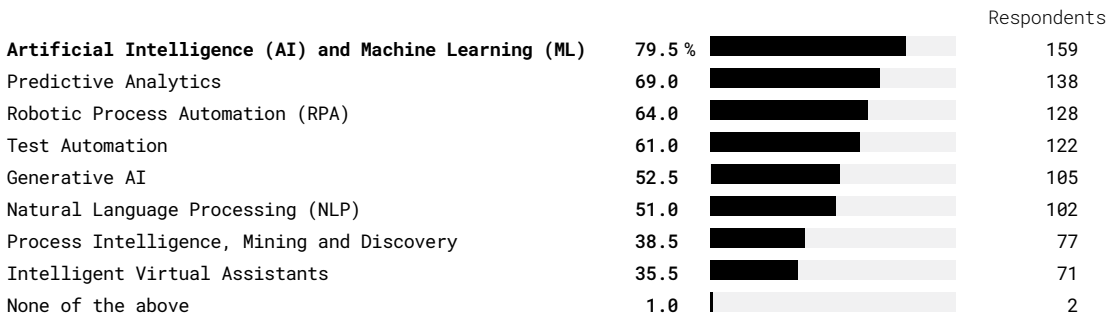
Healthcare and life sciences

More than 50% of respondents had
greater than \$5 billion in revenue
in the prior year

Data highlights for survey results

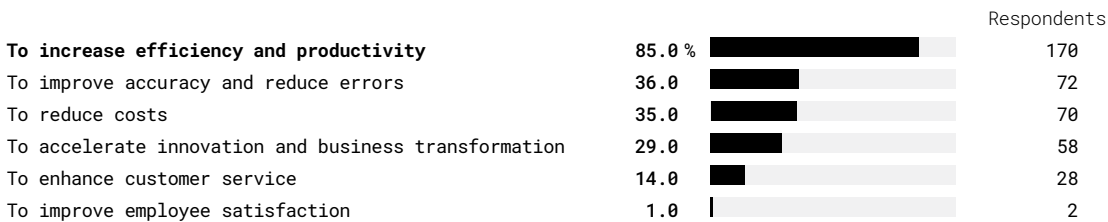
Question 10

Which specific automation technologies have you deployed?



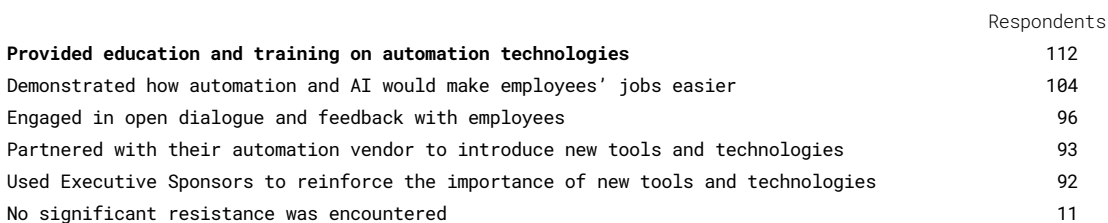
Question 11

What were the primary motivations for adopting automation in your organization?



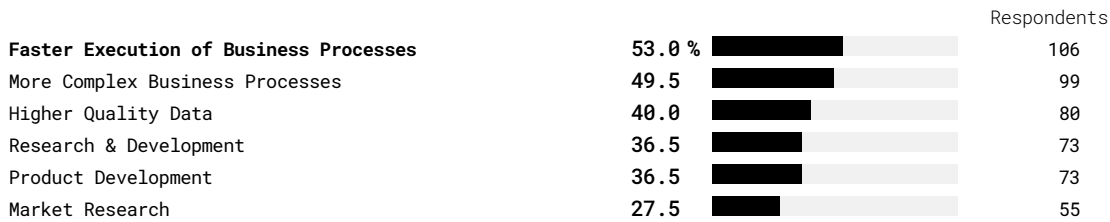
Question 19

Which techniques have you used to facilitate smoother integrations between legacy systems and newer automation technologies?



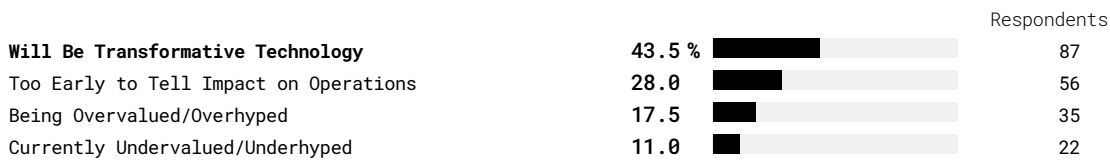
Question 21

What areas do you expect AI-powered solutions to have the greatest impact on your business?



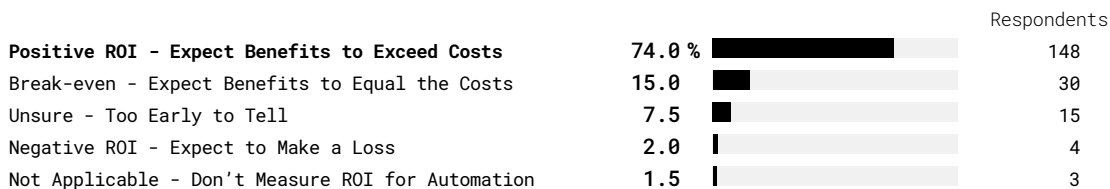
Question 26

Which of the following do you believe to be true about Generative AI?



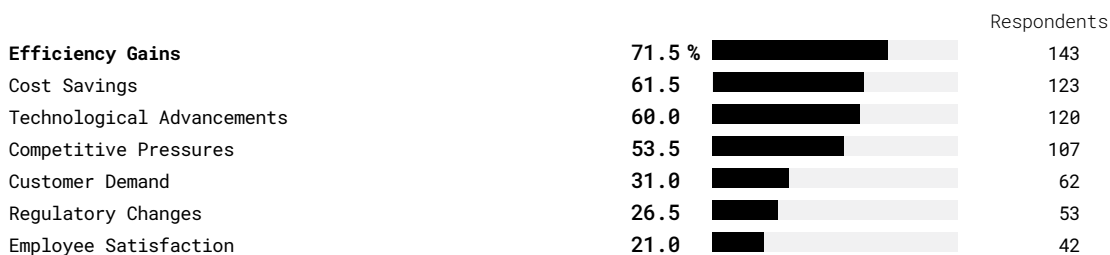
Question 29

What are your expectations for the ROI of your organization's automation efforts?



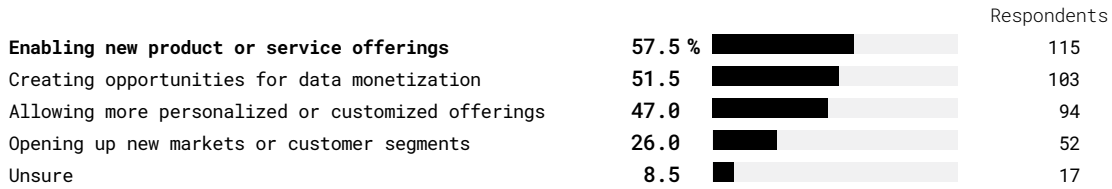
Question 31

What are the key factors you believe will drive further adoption in your industry?



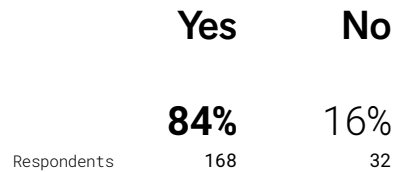
Question 41

In what ways do you expect AI-powered technologies to enable new business models or revenue streams for your organization?



Question 43

Do you believe AI will be good for humanity?



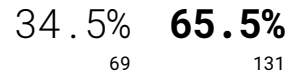
Question 44

Do you believe AI will radically change how businesses operate in the next five (5) years?



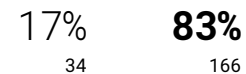
Question 45

Do you believe AI will fully replace current core technologies in your organization in the next five (5) years?



Question 46

Are you concerned AI could make your role obsolete in the next five (5) years?



Authors



Ted Shelton

Expert Partner
Bain & Company

Ted Shelton is a San Francisco based partner in Bain's Enterprise Technology practice and the global product leader for business process redesign.

Ted's client work centers on automation, artificial intelligence and digital innovation, particularly robotic process automation, advanced analytics, machine learning, and generative AI. Ted works across industries and has most recently supported clients in healthcare, software, and financial services.

Prior to joining Bain, Ted held leadership roles in several other consulting firms and spent the first half of his career as a developer, manager of development teams, and as an executive in Silicon Valley software companies. Ted is the author of the 2013 John Wiley & Sons book "Business Models for the Social, Mobile, Cloud."



Ian Barkin

External Advisor
Bain & Company

Ian is an entrepreneur, investor, and advisor with 25 years of experience in digital ops, intelligent automation, and business process outsourcing. He co-founded Symphony Ventures, the pre-eminent RPA consultancy of its time and now invests in and advises tech and tech-based services firms in his role as Partner of 2B Ventures.

Passionate about teaching, Ian co-authored the book 'Intelligent Automation: Welcome to the World of Hyperautomation' and has seven LinkedIn Learning courses on RPA and AI that have helped hundreds of thousands develop the skills necessary to compete in the future of work. His latest research on Citizen Development was featured in Harvard Business Review and MIT Sloan Management Review.



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