



Deep Analysis

Custom Research

Market Momentum Index™

Intelligent Automation, Artificial Intelligence, and Data

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Introduction

In recent years, organizations have been encouraged to look toward adopting automation and artificial intelligence (AI) to find ways to improve their efficiency, organizational fitness, and competitiveness. Intelligent automation is the result: combining the potential impact of automating important, complex business processes with AI's ability to quickly adapt to changing business conditions.

In order to adopt intelligent automation, organizations face challenges around ensuring that their internal data and existing business applications are fit for this new purpose, and locating and capturing the specific processes within their operations where this technological change will have the greatest impact.

Against this backdrop, Hyland commissioned Deep Analysis to conduct a research project seeking to understand how organizations are approaching the adoption of intelligent automation and AI. What are their short- and medium-term plans to adopt the technologies, and what effect is that having on the rest of their enterprise application estate? How are they scaling the challenges around data fitness and quality to implement intelligent technologies? What are the business problems that are driving the adoption, and how are the results panning out?

For this project, 400 enterprises were interviewed by questionnaire; all are based in the United States or the United Kingdom, have revenues over \$10 million, and operate in a selection of key industries.

Quantitative research data was collected during August and September 2024 and analyzed during September and October 2024. Full details of the data collection, sampling criteria, and other associated information can be found in the methodology section of this report.

Executive Summary and Key Findings

The first *Market Momentum Index: Intelligent Automation, Artificial Intelligence, and Data* survey, conducted by Deep Analysis with support from Hyland, reveals that **88% of respondents said that their organizations are active, or expect to be active within 6 months, in the planning of intelligent automation.**

Of the 400 US- and UK-based enterprises surveyed by Deep Analysis, 61% are actively planning their intelligent automation projects right now, and a further 27% expect that process to begin within 6 months. The enterprises are in the following sectors: Healthcare, Government, Financial Services, and Insurance.

Intelligent automation is process automation that uses AI within its operation, as defined in the sidebar. It might be less well known than the technologies that underpin it, but organizations have rapidly latched on to how AI allows them to transform a range of their most complex business processes.

Intelligent Automation Defined

Intelligent automation combines artificial intelligence (AI) with automation to handle complex business processes more efficiently and adaptively. Unlike traditional automation, which focuses on programmatic automation of repetitive tasks, intelligent automation enables systems to learn, make decisions, and respond to real-time data, allowing organizations to automate more intricate workflows involving judgment, prediction, and adaptation to changing conditions.

(Source: Hyland Software)

The survey revealed additional key findings that are summarized here.

- Insurance was the surveyed industry with the highest propensity for intelligent automation planning, with 91% of organizations in that “actively planning/planned within 6 months” group, followed by Financial Services (89%), Healthcare (88%), and Government (85%). Additionally, 77% of respondents indicated that their intelligent automation projects were directed towards automating the most complex processes in their organizations, with 62% expecting that significant change would result from its successful implementation.
- 83% have AI projects in production or evaluation, and of that group, 84% have AI projects that are now deployed into their day-to-day operations. There are only marginal differences between the US- and UK-based respondents: 80% of US respondents had projects in a production or evaluation phase vs. 83% in the UK. However, US-based respondents had a higher overall percentage of projects in deployment (70%), than UK-based respondents (68%). Insurance industry respondents indicated their industry was ahead of the mean, with 89% saying they had AI projects in production or evaluation.
- Organizations active in both intelligent automation and AI are likely to recognize the importance of data to their successful operation, and this was reflected in the survey responses: 99% of respondents said that internal data played some part in their intelligent automation projects, with 81% saying that it played a large or major role. CRM, ECM/ document management, and ERP systems were cited as the most common sources of that data.
- Data quality remains an issue for these forward-thinking organizations: 83% said that they'd had to exclude at least one data source from their intelligent automation projects due to poor quality data. 59% said this problem had extended to several systems, and 15% said it was true of many of the systems they'd examined.
- The use of intelligent automation and AI seems to be driving organizations to consider ripping up their existing enterprise application stack. 74% of respondents would be willing or very willing to replace their ERP system with an AI-enabled alternative. 82% would be willing to do the same with their ECM/document management system. Indeed, 48% of respondents are planning to replace their ERP system within the next 3 years, 56% their ECM/document management system, and 57% process management.
- Digging into what is driving the adoption of intelligent automation and AI, respondents were asked to confirm which challenges their interest in automation was seeking to meet. When asked if "not enough people to do the work" was important, only 10% replied that it was. Improving data quality (63%) and improving access to knowledge/data (58%) received the strongest responses.
- For organizations actively evaluating and deploying AI, the results indicate progress. 74% responded that they see the value of AI being a vital or important contributor to their work. 88% said that their AI projects had either met or exceeded targets.

Methodology

Quantitative data for the *Market Momentum Index: Intelligent Automation, Artificial Intelligence, and Data* survey was gathered via a set of panel questionnaires conducted anonymously within 400 enterprises, split between the US and the UK.

The quantitative data panel was created from self-identified respondents matching the following profile, with no weightings unless specified:

Geographical Profile: Based in the United States (250) and the UK (150)

Weighting of this geographic sampling has been used within the analysis where stated to normalize the response. This weighting may on occasion cause a small discrepancy when used alongside the combined data.

Industry Profile (equally weighted within sample):

- Healthcare
- Government
- Financial Services
- Insurance

The rounding of percentages to whole numbers in this report's charts means that some may not total exactly 100%. The underlying data is complete and equals 100%; rounding is used simply for readability.

Financial Profile: Annual revenue greater than \$10 million

Size Profile: More than 1,000 employees

Employment Role:

- Executive/C-level (CEO, CIO, CTO, CDO, etc.)
- VP level
- Director level
- Manager level

Decision-Making Role:

- Direct decision-maker
- Involved in senior management decisions
- Part of middle management discussions

Organizational Structure:

- IT Organization
- Digital Transformation/Innovation Office
- R&D
- Product Development/Engineering
- Manufacturing/Operations
- Corporate Strategy & Planning
- Facilities Management
- Human Resources

Analysis of Research Data

This inaugural version of the *Market Momentum Index: Intelligent Automation, Artificial Intelligence, and Data* survey, conducted in the late summer and early fall of 2024, was conceived with the support of Hyland to reveal how organizations are approaching intelligent automation and AI along with the allied challenges and opportunities that both present.

As discussed in the Executive Summary/ Key Findings, many areas of interest were uncovered during the quantitative research that help illustrate the current situation within the selected sample of organizations, verticals, and roles/departments. In this section, we expand upon those areas of interest, with selected illustrative charts providing additional insights.

Intelligent automation; actively planning and expecting big things

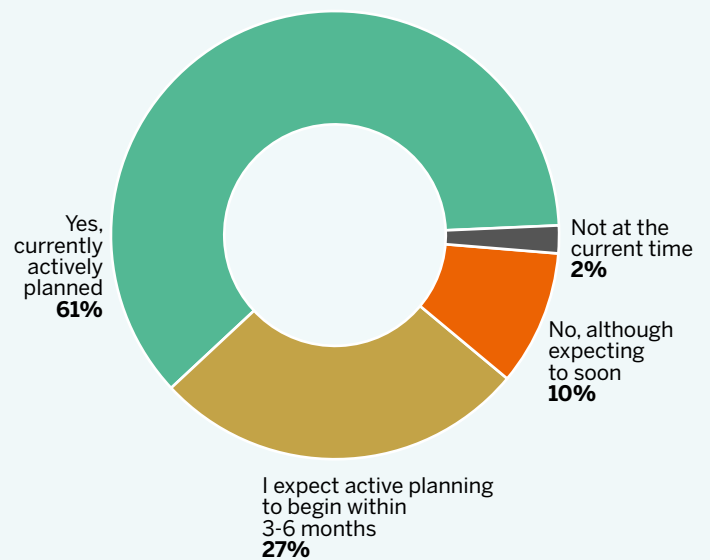
A primary focus of the *Market Momentum Index: Intelligent Automation, Artificial Intelligence, and Data* survey was to uncover the current propensity for activating intelligent automation projects, and the makeup of those projects, across the selected sample of organizations. The results were extremely clear: 88% of respondents said that their organizations are active in planning intelligent automation or expect to be active within 6 months.

This breaks down to 61% for whom active planning is currently in progress and a further 27% for whom planning will begin within 3-6 months (see Figure 1). A further 10% have no date placed on their planning, but still expect it to begin at an unspecified date, and only 2% have no plan at all.

Figure 1

Intelligent Automation Projects in Planning

[Q23] Do you have Intelligent Automation projects (automation using AI) in the planning phase at the current time? [n=400]



Using a weighted version of the geographic split within the sample, 91% of US respondents were actively planning/planned within 6 months, with 83% in the UK. That same weighted result shows that 1% of US and 3% of UK respondents have no plan.

Breaking down the response by industry shows a few small differences in project timing but relative uniformity when viewed as active/within 6 months, with Insurance at 91%, Financial Services at 89%, Healthcare at 88%, and Government at 85%.

Figure 2 shows the percentage breakdown by vertical. The mean for “actively planned” is 61%, and by sector Healthcare is 54%, Government 66%, Financial Services 64%, and Insurance 61%. For “planning within 3-6 months” the mean is 28%, and by sector Healthcare is 34%, Government 19%, Financial Services 25%, and Insurance 30%. This suggests that Government has the most projects in active planning but the least in the slate to come within 3-6 months, Healthcare has the reverse, and all four show an almost identical breakdown for unspecified future projects. Government has the largest “no plan” result, with 5%.

Respondents were also asked about the intent of their intelligent automation projects: what was the focus in terms of scale and the expected impact of the project on the organization (see Figure 3).

In the first instance, respondents were asked to grade the complexity of the intended projects from “small, discrete tasks” (1) to “complex, multi-step business processes” (5). 77% scored a 4 (54%) or 5 (23%) on how complex the intent is of their intelligent automation projects. When looking at the potential outcome for their organizations, the same scale was applied with “steady incremental benefits to existing business activities” (1) to

Figure 2

Intelligent Automation Projects in Planning, by Industry Vertical

[Q23] Do you have Intelligent Automation projects (automation using AI) in the planning phase at the current time? [n=400]

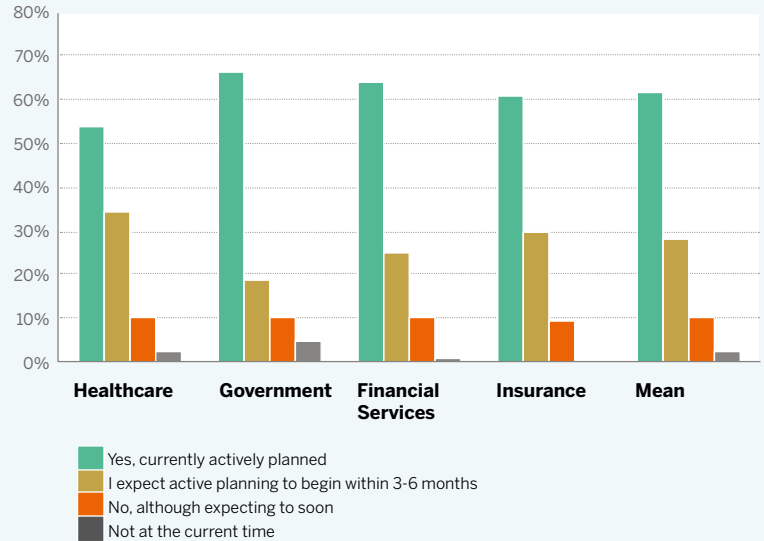
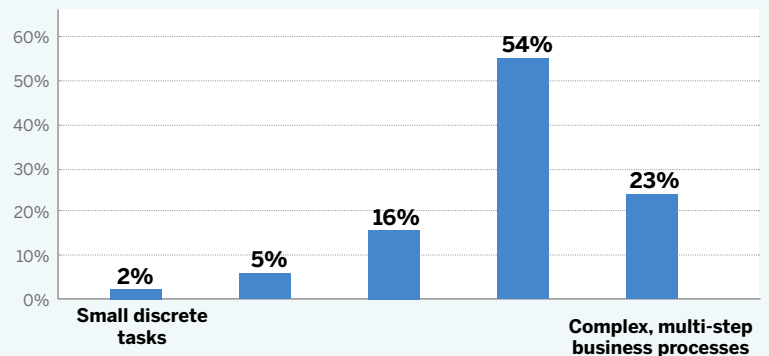


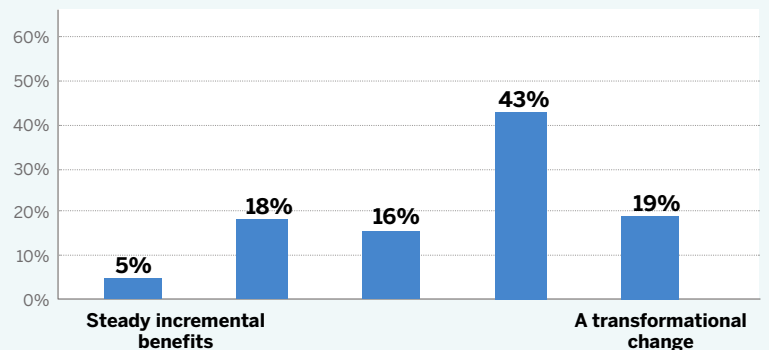
Figure 3

Intelligent Automation Project Rationale and Investment Result

[Q40] What are your Intelligent Automation efforts more focused on improving? [n=400]



[Q42] If you are currently undertaking an AI project or plan to soon, which do you more greatly expect your investment in AI to provide? [n=400]



“a leap forward, a transformational change” (5). On this second question, 62% scored a 4 (43%) or 5 (19%) on the transformational scale of the change expected. In both cases, most respondents opted for one notch down from the largest scope/impact, suggesting a hesitancy to expect the largest possible scope and result, but certainly indicating a broad intent toward delivering complexity and transformation through intelligent automation.

Current use of AI; strong correlation with intelligent automation

Intelligent automation is enabled through AI, so understanding the attitude toward and propensity to deploy that technology is an important piece of context. We used a question and response format from previous Market Momentum AI surveys to understand the current position of AI within our respondents' organizations and discovered that 83% have AI projects in production or evaluation.

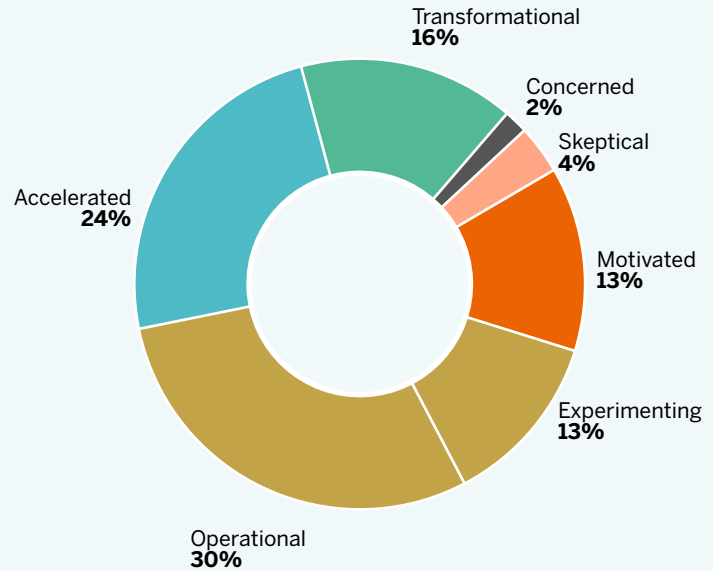
Breaking that down further (see Figure 4), 70% of respondents have AI projects in production (operational, accelerated, and transformational responses). Indeed, of that headline figure of 83% (production or evaluation), 84% have passed the experimentation phase and deployed AI into their day-to-day operations. In short, organizations actively hands-on with AI are highly likely to reach active use. Additionally, the active use of AI supports the previously detailed strong interest in the application of AI towards automation.

Geographic splits on this data reveal only marginal differences between the US and the UK. The US respondents had an 80% production or evaluation rate vs. 83% in the UK. But looking at those purely in production we see the reverse, with 70% for the US and

Figure 4

AI Projects in Production or in Evaluation

[Q7] As it relates to the use of AI (including GenAI and/or LLMs) within the business, at what stage would you place your organization? [n=400]



Stages of AI Projects Defined

Concerned: Risk adverse; searching for where this can go wrong.

Skeptical: Wait and see.

Motivated: Excited about the technology but haven't used it yet; seeking use-cases and planning to pilot and then deploy where possible.

Experimenting: Experimenting but haven't deployed any large-scale projects yet.

Operational: We have begun to adopt AI into some of our day-to-day functions.

Accelerated: Adopting AI into many of our day-to-day functions, continuously seeking new use cases, and deploying where possible.

Transformational: AI is built into the DNA of our business and into almost all our day-to-day functions. We rely on AI to do some heavy lifting for the business and as a value generator for our customers.

68% for the UK. It is only marginal, but the UK respondents currently have more AI in an experimental phase (15% vs. 11% for the US).

When this data is broken down by industry, clearer differences emerge (see Figure 5). Insurance, with 78% in production or in evaluation, is significantly outperforming both the mean and other respondent industries. Financial Services (70% / 81%) is the closest to matching the mean result. In terms of just AI in production, Government (62%) and Healthcare (66%) can be considered laggards, albeit within significantly positive indicators of adoption across the board.

It's important to note that each operational, accelerated, or transformational label has a significantly subjective element and may best represent respondents' attitudinal state as much as their operational state. We recommend interpreting these labels as indicative of respondents' organizational drive rather than truly representing the complexity of their AI deployments.

Data, Data, Data; important, disparate, and often incomplete

The use of data is vital for both intelligent automation and AI, but what often causes confusion is what data to include, where that data resides, what it might contain, and its relative quality. The survey asked respondents specifically about their intelligent automation projects and the data that will be used to power them.

Unsurprisingly, there was unanimity on the importance of data in the responses (see Figure 6). 99% of respondents stated that internal data played a part: 22% said a major part, 59% said a large part, and 16% some part. For the industry verticals surveyed, the

Figure 5

AI Projects in Production or in Evaluation, by Vertical and Operational Projects

[Q7] What stage would you place your organization at regarding the use of AI (including GenAI and/or LLMs - Large Language Models) within the business? [n=400]

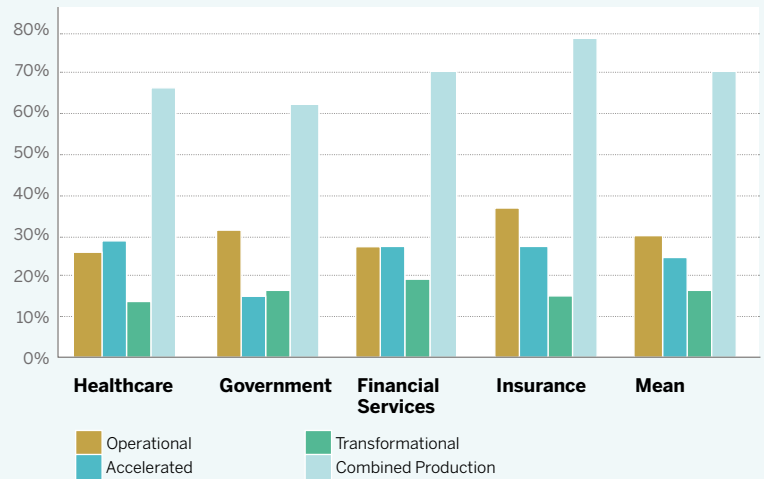
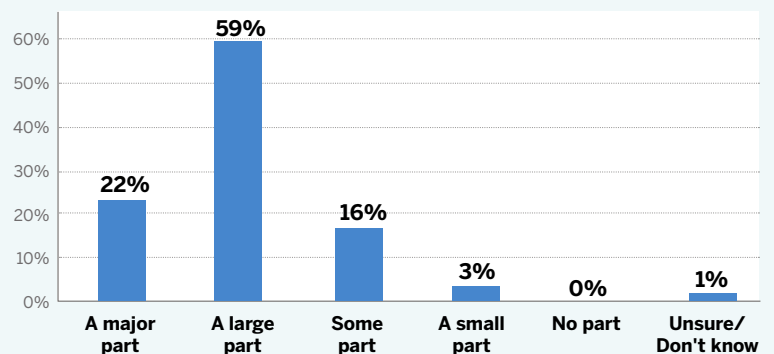


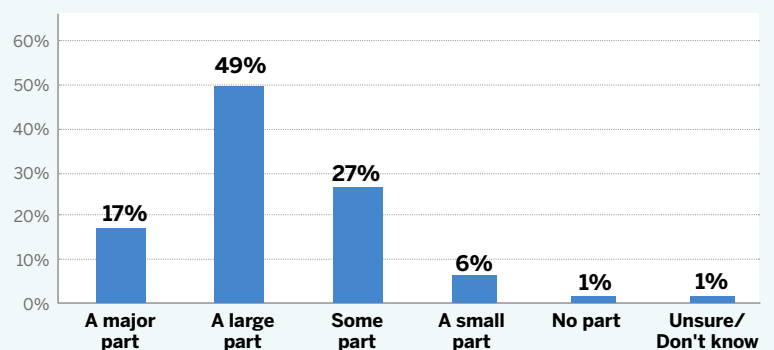
Figure 6

Importance of Internal and External Data in Intelligent Automation Projects

[Q27] Thinking about those Intelligent Automation projects - in production, in delivery, and planned - to what extent does internal content (and data) play a part? [n=400]



[Q28] Thinking about those Intelligent Automation projects - in production, in delivery, and planned - to what extent does external content (and data) play a part? [n=400]



view was largely consistent: for a large or major part, the responses were Healthcare at 75%, Government 83%, Financial Services 82%, and Insurance 83%. For external data, the results were naturally a touch lower: 93% at least some part, 66% a large or major part, and 17% a major part.

Respondents were asked where that data originates (multi-select) and the results were consistent in their variety (see Figure 7). No single system had a response below 29% (email) or above 66% (CRM) but they were clustered between those two marks. We observed this sort of response in a prior study: respondents tend to identify that those systems exist within their organizations and house data used for projects, but they don't tend to opt for any being an overwhelming single source. Enterprise data must be treated as disparate, with all the management overheads that includes.

When broken down by industry vertical, the results remain largely consistent across the board (see Figure 8). Insurance has a small additional peak for email and ERP, while Healthcare and Financial Services have small peaks for document management. What we're seeing in this industry vertical data is consistent with largely horizontally aligned applications producing consistent output regardless of where they are utilized.

Figure 7

Importance of Internal and External Data in Intelligent Automation Projects

[Q29] Which systems does the internal content/data originate from? [n=400, multiselect]

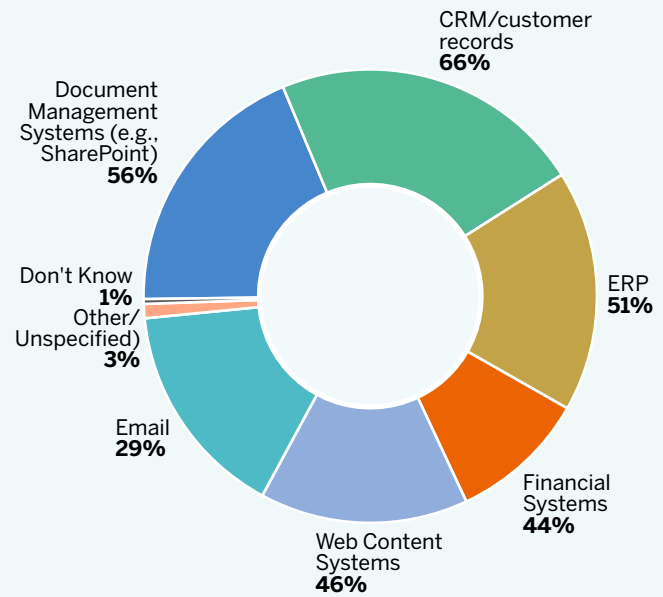
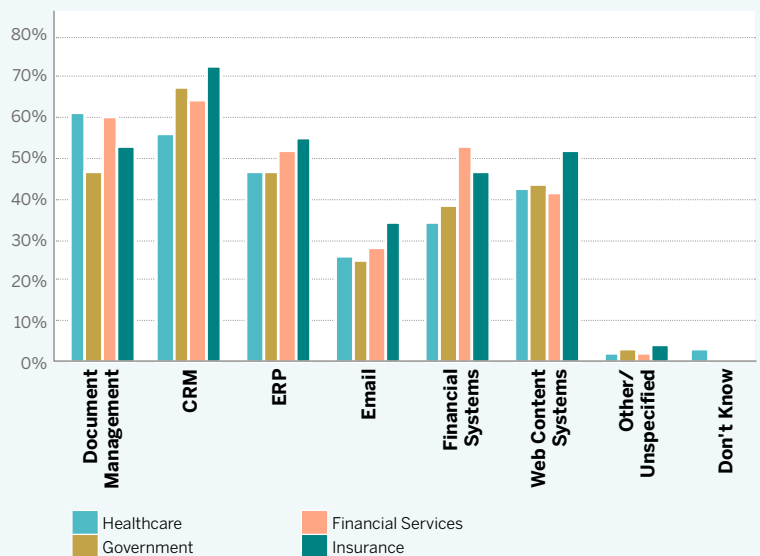


Figure 8

Internal Data by Systems for Intelligent Automation Projects, by Industry Vertical

[Q29] Which systems does the internal content/data originate from? [n=397, multiselect]



Given that unanimity on the importance of data, it is sobering to process the responses to the question on data exclusion (see Figure 9). Respondents were asked whether any data sources had to be excluded from use in an intelligent automation project due to their general poor quality (“unsuitable/ dirty/ unclassified/ insecure”) and 83% responded this was true of one or more of the systems that they’d examined. Breaking this down further, 59% said several to many systems had to be excluded, with 15% saying many systems.

This means that organizations are having to exclude portions of data – unknown at this point – that otherwise would be utilized to the advantage of intelligent automation or other outcomes, because its poor quality makes it unreliable.

Of note here is that when asked about the purpose of process transformation enabled by intelligent automation (see Figure 10), 74% responded that it was to improve the quality of process data rather than decreasing costs or elapsed time. There’s no causation plottable between this response and that acknowledged data quality problem, and while using correlations in this way is at best dubious, it is interesting to see data quality improvement appear as a key business purpose of automation.

Figure 9
Data Exclusion

[Q34] When considering the content design of these projects, did any system have to be excluded because the content was unsuitable/ dirty/ unclassified/ insecure? [n=400]

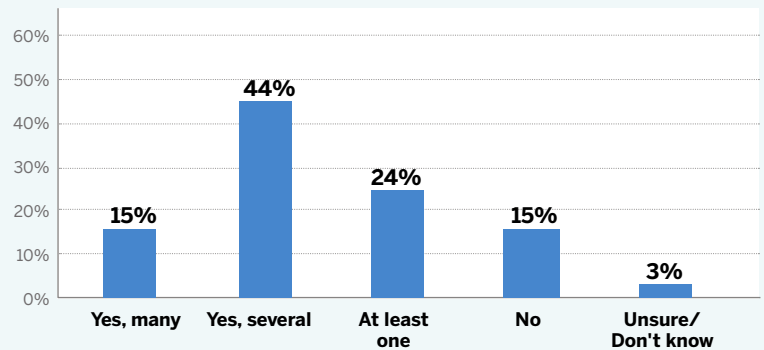
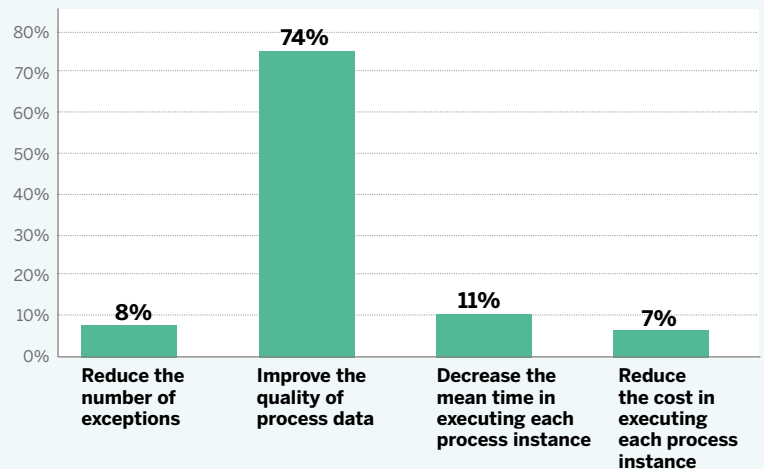


Figure 10
Purpose of Intelligent-Automation-Powered Process Transformations

[Q37] Are the process transformations designed to primarily.... [n=400]



Intelligence is driving a new enterprise technology stack

The potential disruption by technologies such as intelligent automation and AI on the traditional enterprise application stack was also examined in the survey, and the results help quantify respondents' current feelings towards wholesale change in this area. In short, respondents express a significant willingness to change central pillars of their enterprise application stack if a more efficient, AI-optimized alternative is available.

74% of respondents are willing or very willing to replace their ERP system, 81% to replace their current process management system, and 82% to replace their ECM/document management system (see Figure 11). These numbers are far larger than was anticipated; replacing an ERP system, for example, has historically been a years-long, multi-phase process (with the financial implications to match).

Replacement projects for ERP, ECM, and process management tend to be generational exercises; incumbents are often in place for several decades because replacing them is expensive and complex. However, the prospect of alternative solutions, particularly through promising AI optimization, elicits a surprisingly enthusiastic and positive response from respondents.

Results for the industry verticals are largely consistent with the consolidated results, although Insurance as a sector seems to exhibit greater enthusiasm for replacement projects, appearing above the mean in every result (see Figure 12).

Figure 11

Willingness to Replace Core Enterprise Technology with an AI-Enabled Alternative

[Q8] How willing would you be to invest the time and resources needed to replace your existing system with a newer, more efficient (AI-optimized) system? [n=400]

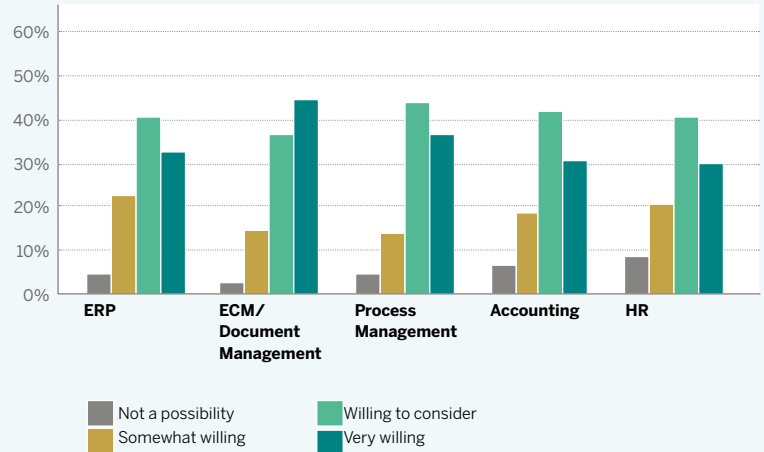
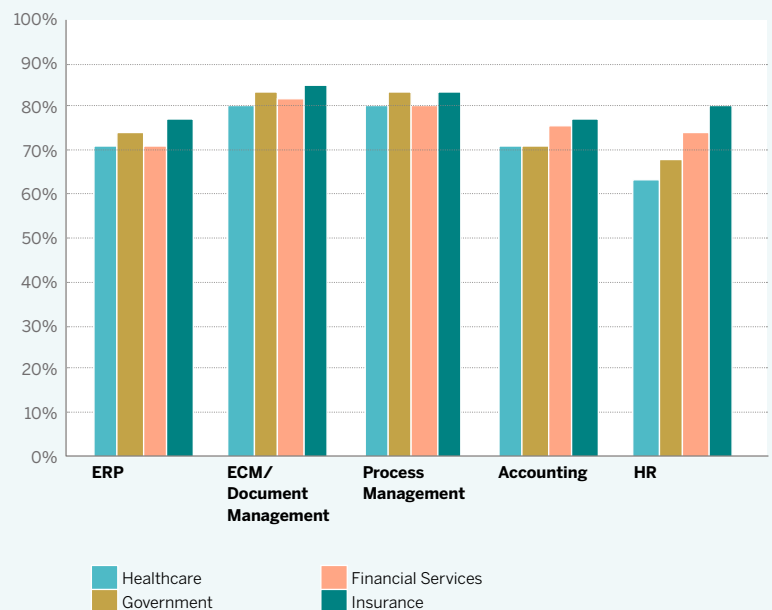


Figure 12

Willing/Very Willing to Replace 5 Key Enterprise Applications, by Industry Vertical

[Q8] How willing would you be to invest the time and resources needed to replace your existing system with a newer, more efficient (AI-optimized) system? [n=400] - aggregate of willing and very willing, by industry vertical]



After being tempted by a theoretical AI-optimized alternative, respondents were then asked whether they actually planned to replace any of these systems within 3 years. While these results were a shade lower than reported previously, they do display some striking intent (see Figure 13). Over half of respondents indicated that ECM/document management and process management applications are slated for replacement within 3 years, along with almost half of all ERP systems.

Looking at the industry vertical breakouts, we again see Insurance as generally keenest for a replacement cycle across the board (see Figure 14). For ERP, over half of Insurance and Government respondents are planning a replacement, and for ECM/document management 63% of Financial Services and 61% of Insurance respondents are doing the same. By comparison, Accounting generated a relatively mild response, yet even it saw an aggregated response of 39%, with well over 40% in Financial Services and Insurance planning a replacement.

Figure 13

Likely Buying Propensity Across a Range of Enterprise Applications over the Next 3 Years

[Q9] Do you plan to replace any of your current systems within the next 3 years? [n=400, multiselectable]

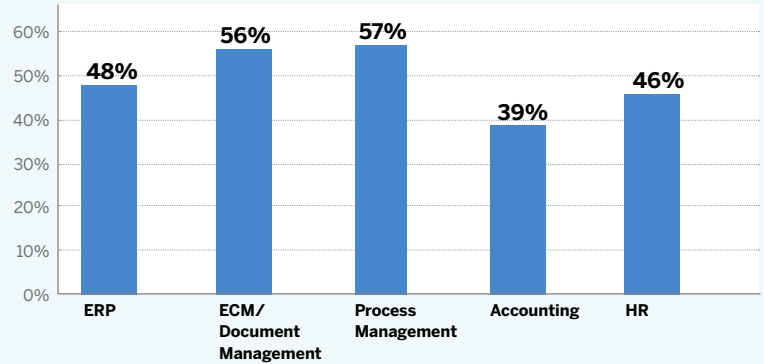
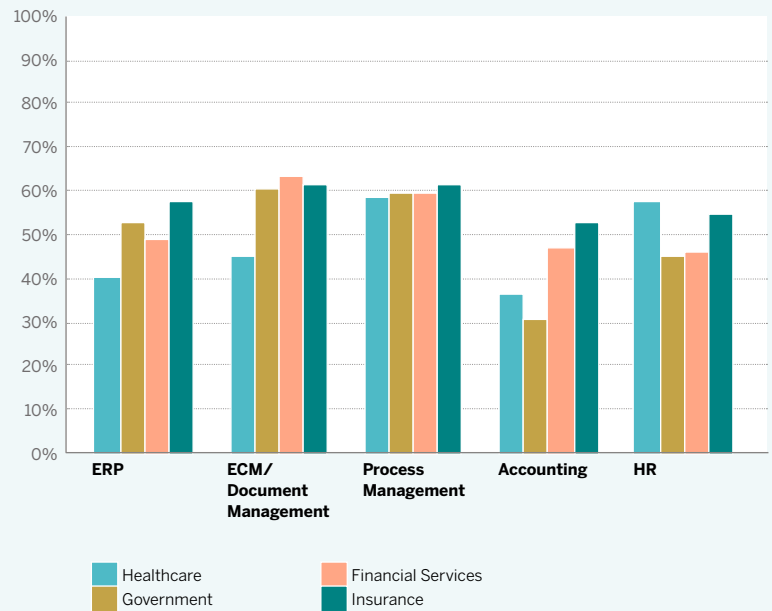


Figure 14

Likely Buying Propensity Across a Range of Enterprise Applications over the Next 3 Years, by Industry Vertical

[Q9] Do you plan to replace any of your current systems within the next 3 years? [n=400]



Trends and Themes

In addition to the prior analysis, trends and themes emerged in the survey data that are highlighted in this section.

It's not a shortage of workers driving AI (and intelligent automation) projects

AI providers – especially the recent generative and agentic waves – commonly reason that the systems are necessary for enterprises as they fulfill the need for more workers. This is especially true around functionality that is designed to improve productivity (when it is also allied with notions of improving the working environment).

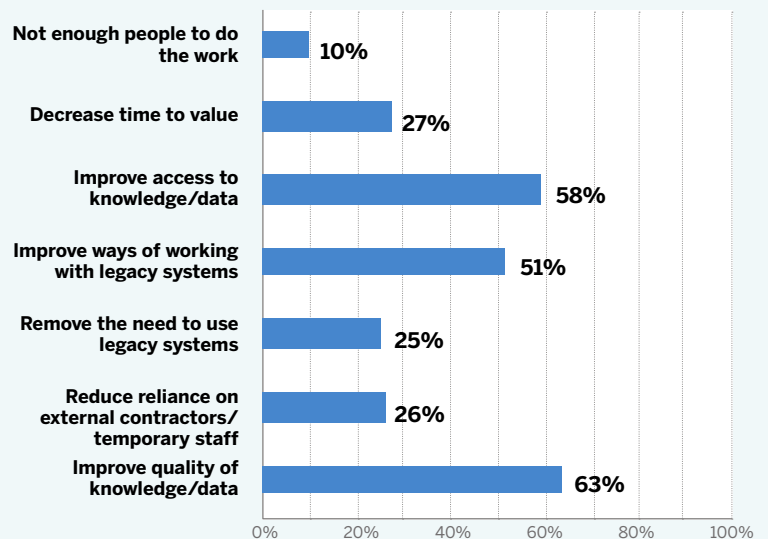
The survey asked respondents specifically which rationales applied to their organizations if they are actively using or considering AI-derived automation (see Figure 15). The lowest-scoring response (10%) was “Not enough people to do the work” – which dropped to 6% for respondents in Healthcare – somewhat deflating a common go-to-market approach for vendors around AI and productivity.

What was common among the highest scoring responses was data. “Improve quality of knowledge/data” (63%) and “Improve access to knowledge/data” (58%) demonstrate that the aforementioned issue of organization data, its quality and access to it (or analysis of it) are of paramount importance to contemporary organizations.

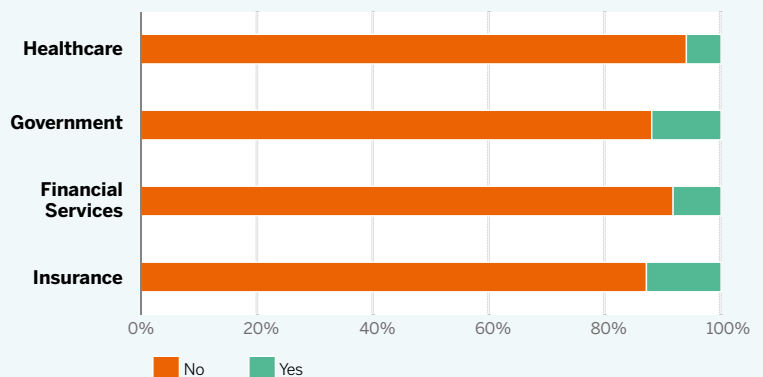
Figure 15

Rationales for Using/Considering AI, and Industry Vertical Breakdown for “Not Enough People to Do the Work”

[Q43] Which of the following apply if you are considering or currently using AI to automate your business activities? [n=400, multiselect]



[Q43] Which of the following apply if you are considering or currently using AI to automate your business activities? Not enough people to do the work [n=400, by industry vertical]



AI is already proving its worth to early adopters

Understanding the realized value of the AI projects that are in progress or deployed is vital in demonstrating praxis for the next wave of investment decisions. The survey asked organizations that are currently using AI (or plan to within the next year) how they perceive the value of its use.

74% of respondents see AI as a vital (18%) or important (56%) contributor to work in their organizations. Looking at the industry verticals (see Figure 16), 31% of Government respondents saw its use as vital, and 71% of Insurance respondents saw it as an important contributor. Indications of redundancy were negligible, and no respondents said it was useless. It should be noted that the responses in this subset are a mix of experiential and anticipated.

Respondents were also asked a similar, but distinct, question about AI projects in production and whether they were meeting their intended outcomes (see Figure 17). Where the first question was more attitudinal, this question was directed toward the measurable outcomes of real projects. Again, the results were positive, with 88% of projects on target (58%) or exceeding targets (30%). In contrast with the previous subset, this subset of data is entirely experiential, however there is a strong correlation between them.

Figure 16

Perceived Value of AI Already Applied (or Planned) in Organizations, by Industry Vertical

[Q10] If you are currently using AI in your organization (or plan to within the next year), how do you conceive its use and value? [n=400]

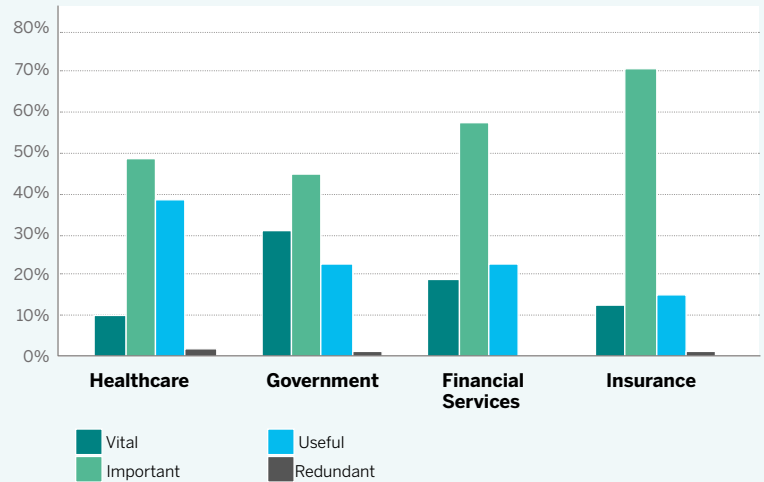
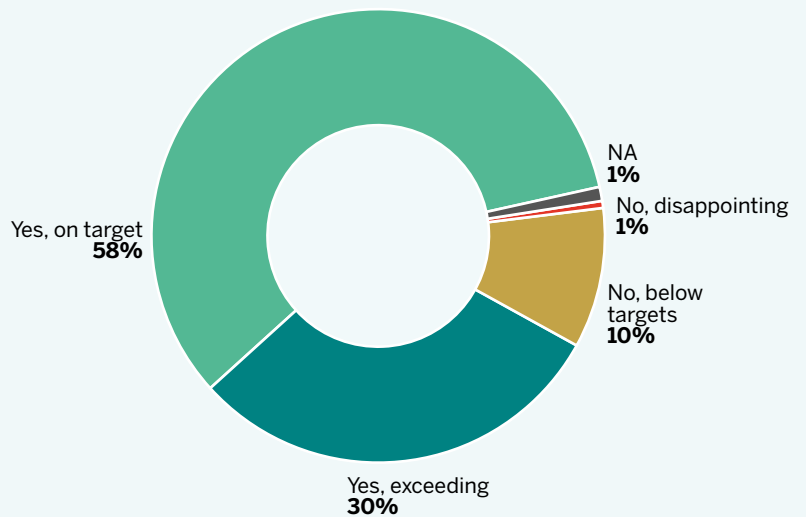


Figure 17

Responses to Question on Whether AI Projects Are Meeting Intended Outcomes

[Q20] Are the AI projects in production generally meeting intended outcomes? [n=400]



Projects are overwhelmingly for IT, by IT

Understanding the primary intended beneficiaries and the primary funding sources for AI and intelligent automation projects has revealed that at this stage of the technology's introduction into organizations, the projects are overwhelmingly being designed and funded by IT, for the benefit of IT.

Respondents were asked which areas of the organization their AI projects focused on (see Figure 18) and 75% responded IT. Respondents could give multiple answers, and the next highest responses were 50% for Customer Support/Service and 40% each for Finance/Accounts and Back Office Operations. Of note, Marketing received 28% and Sales 22%. It's an interesting mix of front- and back-office operations, running a little contrary to the belief sometimes expressed that organizations will benefit from AI only in the front office.

Respondents also recorded the primary financial sponsor of their AI projects: 65% said IT and 27% line-of-business department, with a further 7% saying external sponsorship, such as a grant.

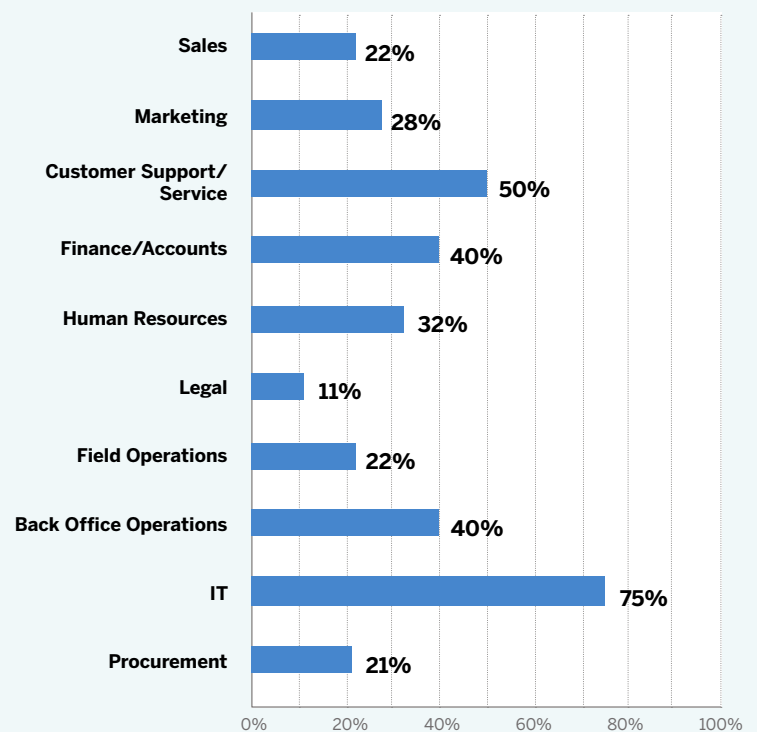
Asked separately about intelligent automation projects and who would be their primary users – a slightly different question than that asked about AI – IT was again the predominant response (60%), followed by line-of-business departments (36%). As for the primary financial sponsor of intelligent automation projects (the same question that was asked for AI), 66% said IT, 28% line-of-business departments, and 6% an external party (see Figure 19).

Contemporary IT budgets are generally not large and are reportedly under pressure to be reduced, which raises some interesting potential conclusions. Are organizations

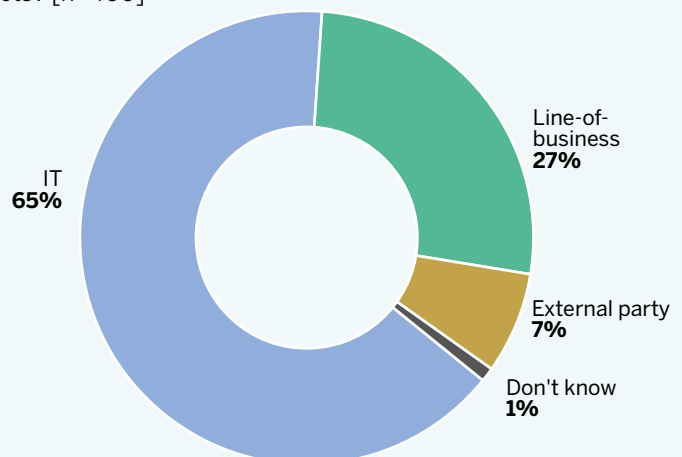
Figure 18

Targets for AI Projects and Their Funding Sources

[Q22] For AI projects - both in production and in progress - which areas are they focused on? [n=400, multiselect]



[Q18] Who were the primary financial sponsors of these AI projects? [n=400]



funneling additional funding to their IT organizations especially for intelligent automation and AI projects, perhaps because of a perception that they require more specialist technical input to complete? Or are the projects actually small enough to fit within existing IT budgets without causing disruption? Although the scope of this survey does not provide any definitive indicators, the answer is likely to be a mix of these and other undetermined factors.

Also of note is that much of the attention focused on generative AI has been on productivity functionality for line-of-business operations. While this survey does not allow us to correlate that specific focus against the project and budget data in this section, we believe that productivity functionality has not yet become a major driver of AI activity within organizations.

Business application vendors are core to intelligent automation projects

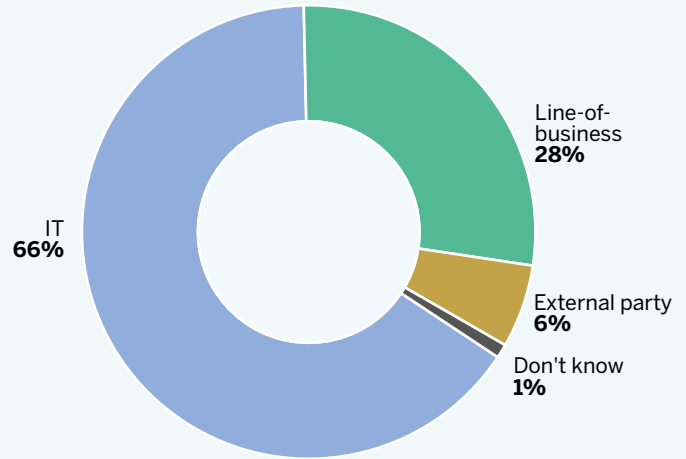
75% of intelligent automation projects are either wholly (15%) or partially (60%) developed by third-party providers in association with customers.

The largest proportion here is for business application vendors via systems integrators. Indeed, 83% of intelligent automation projects involve a business application vendor either directly (29%) or via a partner (54%). 26% of organizations say that they are developing their own intelligent automation projects without third-party involvement.

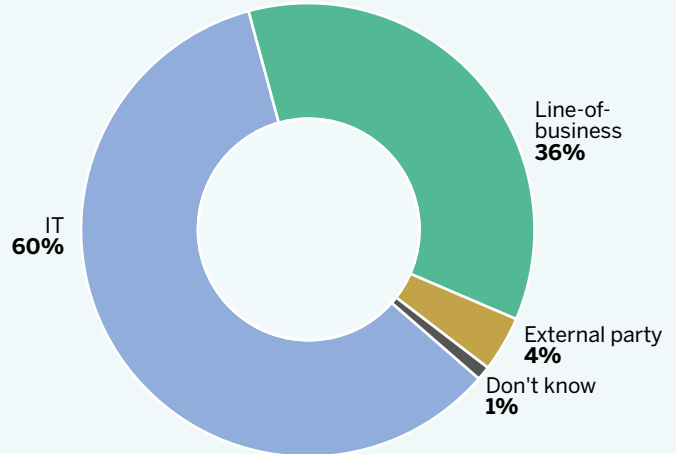
Figure 19

Primary Users for Intelligent Automation Projects and Their Funding Sources

[Q24] Who will be the primary financial sponsors of these Intelligent Automation projects? [n=400]



[Q25] Who will be the primary users of the delivered Intelligent Automation solution? [n=400]



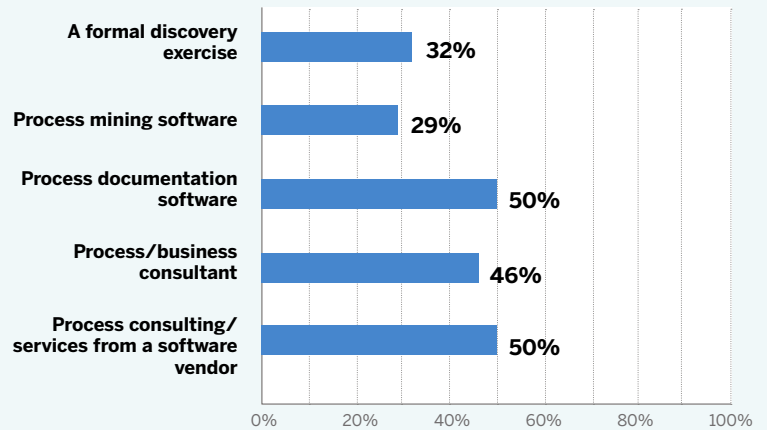
50% of organizations utilized some form of process consulting from their software vendor when developing automation projects, with the same number using process documentation software (see Figure 20). 46% worked with a consultant, 32% opted to perform a formal process discovery exercise, and 29% employed process mining software.

Where process mining software was used, CRM (67%) and ERP (66%) applications were the overwhelming choices as transactional sources for analysis, suggesting that they contribute most of the business-application-focused processes that survey respondents deemed suitable for automation.

Figure 20

What Assistance Organizations Utilized When Developing an Automation Project

[Q44] When planning and/or developing your automation projects, did you use any of the following to assist your progress? [n=400]



Topics for Further Study

A successful research study tends to elicit follow-up questions that were either not included in or out of scope for the original work, and *Market Momentum Index: Intelligent Automation, Artificial Intelligence, and Data* is no different. It has uncovered the degree to which organizations are developing and employing intelligent automation and AI, are concerned about data quality, and are looking to invest in updating the rest of their enterprise application stack to match, but there is still more that would be beneficial to understand. For example:

- Understanding the specifics of the datasets that are being excluded from projects: which forms of data, which forms of unsuitability, and what effects these exclusions have on project and production timelines
- Benchmarking intelligent automation projects against the processes that they augmented and/or replaced to understand impact (time, other resources)
- Following the ongoing timeline into production for intelligent automation and AI projects to check comparative attitudinal and operational metrics
- Deeper understanding of process discovery and analysis, especially the enterprise systems data that is utilized, dedicated tooling (e.g., task and process mining) and the relative success rates in manual vs. semi-automated approaches

It is hoped that a future iteration of *Market Momentum Index: Intelligent Automation, Artificial Intelligence, and Data* will be able to include some or all of these areas.



Conclusions and Recommendations

This first version of *Market Momentum Index: Intelligent Automation, Artificial Intelligence, and Data*, based on research conducted in the late summer of 2024, provides strong indications of significant momentum for organizations that are developing and deploying intelligent automation (88% of respondents said their organizations are active or expect to be active in planning intelligent automation within 6 months) and artificial intelligence (83% have AI projects in production or evaluation). Data continues to be a challenge: 83% of respondents said they'd had to exclude one or more data sources from their intelligent automation projects due to poor quality data.

It is important for the software industry that has invested so much in betting on these technologies to continue this momentum, supporting those already on the train and bringing more on board in the immediate future. To this end, Deep Analysis has recommendations for both customers and the industry that supports them:

→ Organizations must broaden their approach to intelligent automation and AI beyond the environs of IT and into the respective line-of-business operations. It is understandable why new and emerging technology often tends to be incubated in IT; it can be tested, validated, and operated outside the pressures of day-to-day operations. Deep Analysis recommends that breaking out of this operational silo is vital to continue the growth trajectory of these technologies, exposing them to a much broader range of use cases and, critically, to a larger range of

project sponsors and funding sources. We would expect to see the balance between IT and line-of-business projects shift if the promising evaluation and production numbers for projects continue their current trajectory.

→ This research study reveals stark challenges in using organizational data to inform and power intelligent automation and AI projects. Organizations are caught in a vise between knowing how important it is to utilize their existing data sources and knowing that the relatively poor quality of some of that data risks those projects' success. The reasons for that poor quality are likely many. Deep Analysis recommends that practitioner-led data analysis should be a mandatory part of discovery phases for any intelligent automation and/or AI project, so that decisions become less a binary "as is" inclusion or exclusion, but

include potential cleansing. Software vendors should be looking to provide at a minimum, guidance, and at best, specific tooling, to enable these processes, as they have a significant downstream benefit for critical project outcomes.

- The revelation within the survey that the automation rationale of “not enough people to do the work” is the least popular of those provided – the leading responses were “improving data quality” and “access to organizational knowledge” – demolishes a central plank of some software vendors’ approach to marketing intelligent automation and AI projects. Vendors often tell us that lack of workers is a bottleneck that intelligent automation and AI can alleviate. The reality is that most of the time, this is not the case for most organizations. While it can be useful to appeal to the managerial sense that workers inhibit productivity, this idea’s lack of any grounding in reality means that it functions only as a conversation piece, and a dubious one at that. Organizations that understand their own operations will recognize this reality and will likely cut off consideration of propositions from such vendors. We advise that vendors use extreme caution in making such claims.



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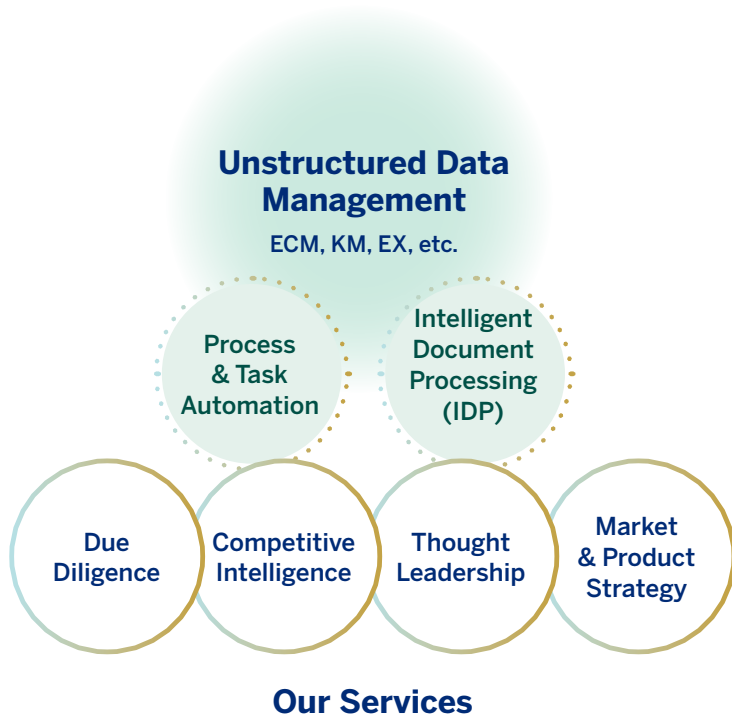
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