

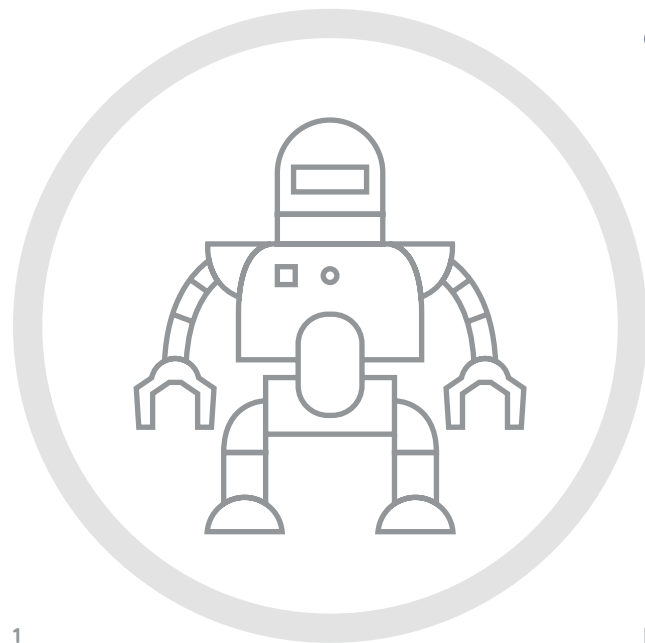
Intelligent Automation Post-Covid

Does your business measure up?



Executive Summary

The Future of Work was well on its way at the start of 2020, with Artificial Intelligence and intelligent automation at the forefront of the digital discussion. Now that an unprecedented global pandemic has reinforced the power and necessity of these technologies, the future may be arriving sooner than expected.



In the wake of Covid-19, government organizations and businesses have turned to customer-facing and back-office automation solutions to tackle the challenges brought on by shutdowns and social distancing. They are using automation to handle spikes in customer requests for services and information related to the crisis, and to help fill in for and support employees who can no longer work in brick and mortar offices.

To further explore how organizations are using these solutions, we commissioned Opinion Matters to survey 500 US IT decision makers in eight industries ripe for automation. We wanted to know how IT leaders are evolving their digital investment strategies and how they have used automation to remain agile. We

found that IT leaders are using automation to not only lower operating costs, but to help their employees be more productive, and to improve customer relationships and loyalty. Additionally, many organizations believe this technology will be key to resilience as they navigate the complexities of re-opening and doing business in a post-pandemic world.

Survey Highlights



ACCORDING TO IT DECISION MAKERS:

71%

agree that intelligent self-service automation helped their organization remain agile during Covid-19.

64%

expect their organization to increase investments in automation technology over the coming year as a result of Covid-19, and more than a quarter (26%) will increase investments more than 10%.

76%

agree that automating more customer support tasks would benefit their workforce.

When respondents were asked about the business outcomes they are prioritizing in their automation strategies over the next year, increasing employee efficiency and productivity was the top priority.



We hope you find this report informative and helpful as you continue driving resilience and innovation in your own organization.

Intelligent Automation Post-Covid

Does your business measure up?

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About the Survey

From May 22 to June 1, market research firm Opinion Matters conducted a survey of 503 US-based IT decision makers working in companies employing 100+ employees in government, banking, insurance, healthcare, retail, enterprise tech, home delivery, and home entertainment.

The organizations range in size from less than \$US 1M to more than \$US 50B. The survey was designed to ensure each sector includes a robust sample.

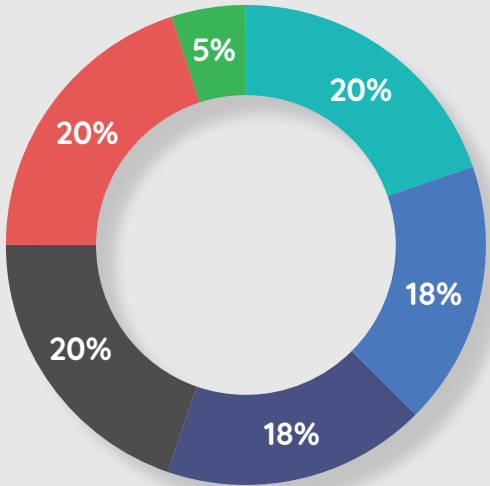
1. Before the Storm



The Government sector had the highest number of respondents whose organizations had no automation strategy.

Automation is already a key strategy for most organizations. More than half (58%) of respondents to our survey had implemented an automation strategy prior to Covid-19, and only 5% had no strategy. This was consistent across industries except in the Home Entertainment sector, where 52% of respondents were still in the earliest phases of developing and planning their strategies.

Interestingly, the Government sector had the highest number of respondents who said their organizations had no automation strategy (18%), and the highest number of respondents whose strategy had been in place for more than two years (28%).



What best describes your automation strategy development prior to COVID-19?

58% of respondents had implemented an automation strategy prior to Covid-19.

AUTOMATION STRATEGY

- Under development
- Planning to implement in coming year
- Implemented in the past year
- In place for one to two years
- In place for more than two years
- We don't have a strategy



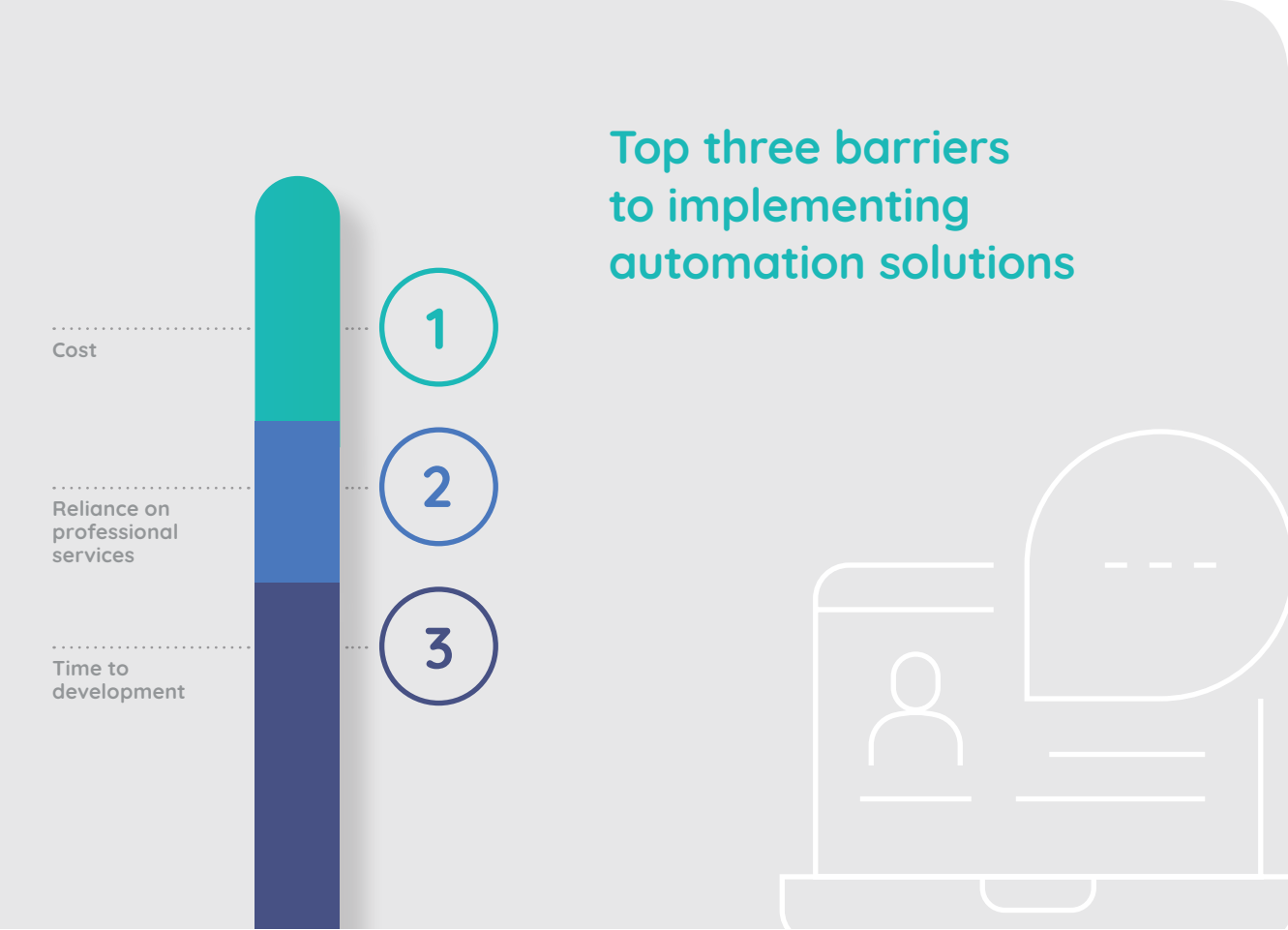
1. Before the Storm



75% of IT decision makers agree that tools that allow them to build and manage their own applications are important to their automation strategies.

We also asked respondents about the barriers to adopting automation in their organizations. Cost ranked highest overall on a scale of 1 (not a barrier) to 5 (big barrier), followed closely by reliance on professional services due to the complexity of implementation, time to development, and limits of legacy technology. However, the Insurance sector ranked reliance on professional services highest as a barrier to adoption, and Home Entertainment and Home Delivery ranked limits of legacy technology the highest.

It makes sense that 75% of all respondents agree that tools that allow them to build and manage their own applications are important to their automation strategies. Having more control over application management can reduce an organization’s reliance on outside professional services, which can, in turn, decrease the cost and time to development of implementing solutions.



1. Before the Storm



Organizations that did not have a strategy, or that were in the earliest phases of planning and implementation, were the most likely to be dissatisfied with their customer service.

Our survey also explored how satisfied IT decision makers are with the performance and productivity of their customer service organizations, and how they compare to competitors in terms of ability to meet customer demands, agility, degree of automation and financial performance.

A vast majority of respondents were either satisfied (63%) or very satisfied (22%) with their customer service performance and productivity. But organizations that had automation strategies in place for one to two years were the most likely to say they were very satisfied. Organizations with strategies in place for two or more years were more likely to be neutral, suggesting the need for organizations to continue improving their strategies once implemented. Automation solutions that give organizations more control of their applications could also address this need.

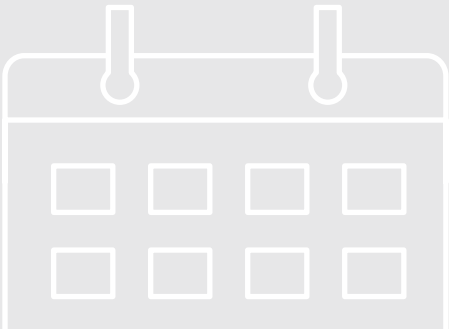
Organizations that did not have a strategy, or that were in the earliest phases of planning and implementation, were the most likely

63%

SATISFIED

22%

VERY SATISFIED



How satisfied are you with the performance and productivity of your customer service organization?

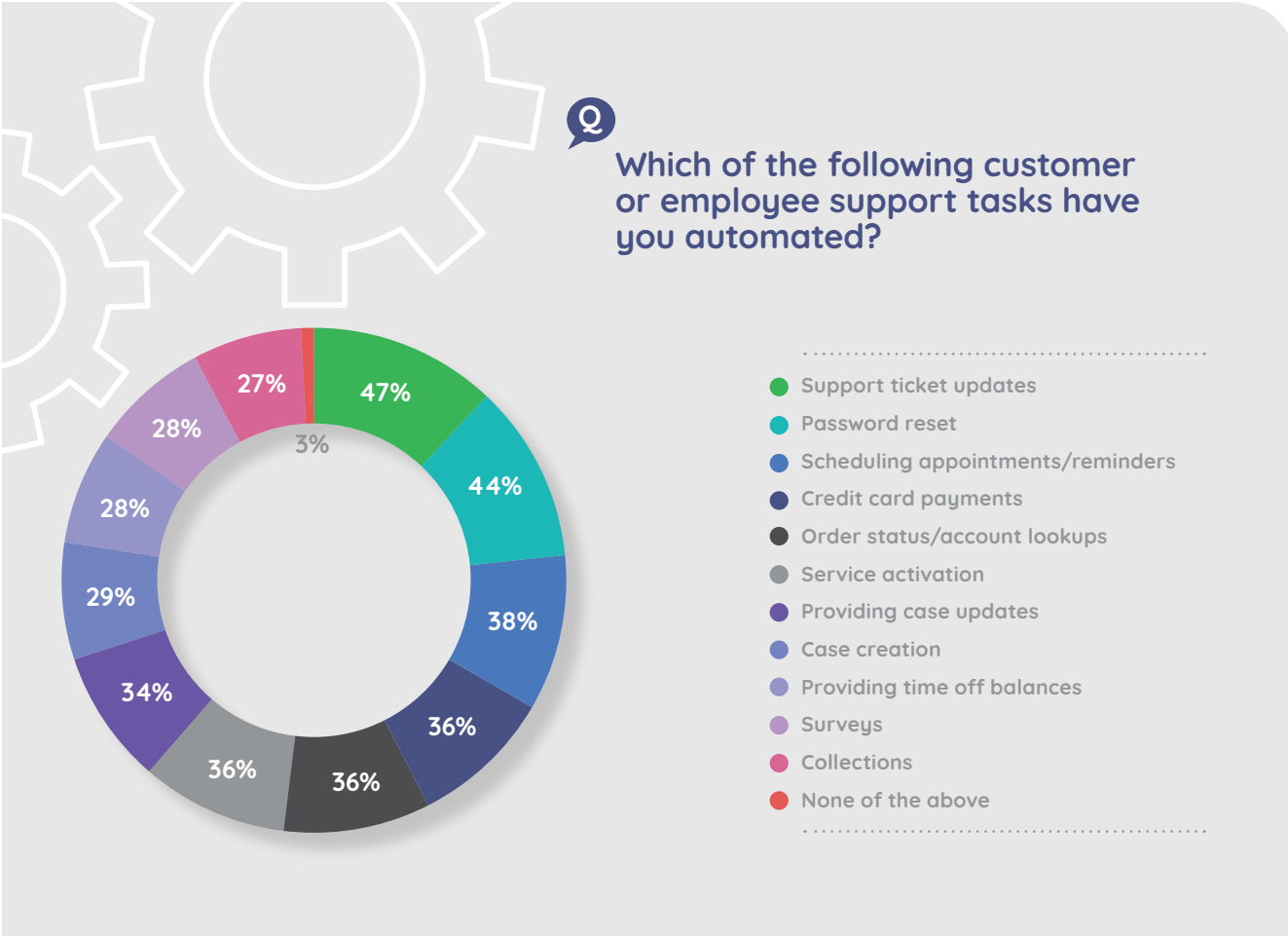
Organizations that had automation strategies in place for one to two years were the most likely to say they were very satisfied.

1. Before the Storm

! Less than half of organizations had automated any one of the customer and employee support tasks we asked about in the survey.

to say they were dissatisfied with customer service performance and productivity. These results seem to indicate that the planning and implementation phases of an automation strategy can cause disruption in customer service productivity and performance.

Most respondents rated their organizations “above average” compared to competitors in their ability to meet customer expectations, agility, degree of automation and financial performance. However, nearly a quarter (24%) of Government organization ranked themselves below average in degree of automaton. This sector also rated themselves lowest in ability to meet customer demands and agility. Insurance is the sector where the highest number of respondents ranked their organizations “well above average” in degree of automation (21%); it’s also worth noting that more than a third (34%) of Insurance respondents ranked their ability to meet customer expectations “well above average.”



1. Before the Storm



Deploying self-service applications across voice, chat and messaging channels has never been easier.

Opportunities for Quick Wins

While **54%** of IT decision makers rated their organization’s degree of automation “above average” compared to competitors, less than half had automated any one of the 11 customer and employee support tasks we asked about in the survey (*see previous page*).

Nearly half of organizations have automated support ticket updates (**47%**) and password resets (**44%**). But less than a third have automated case creation, employee time-off balances, surveys and collections. These findings highlight key opportunities to reduce costs, improve employee productivity, and better meet customer demands—all of which are top priorities for our survey respondents over the next year. (*see page 13*).

With advances in Natural Language Processing (NLP) and the availability of code-free tools for developing and deploying self-service applications across voice, chat and messaging channels, it’s never been easier for organizations to automate these—and many other—types of tasks.



2. Post-Pandemic Trends and Attitudes

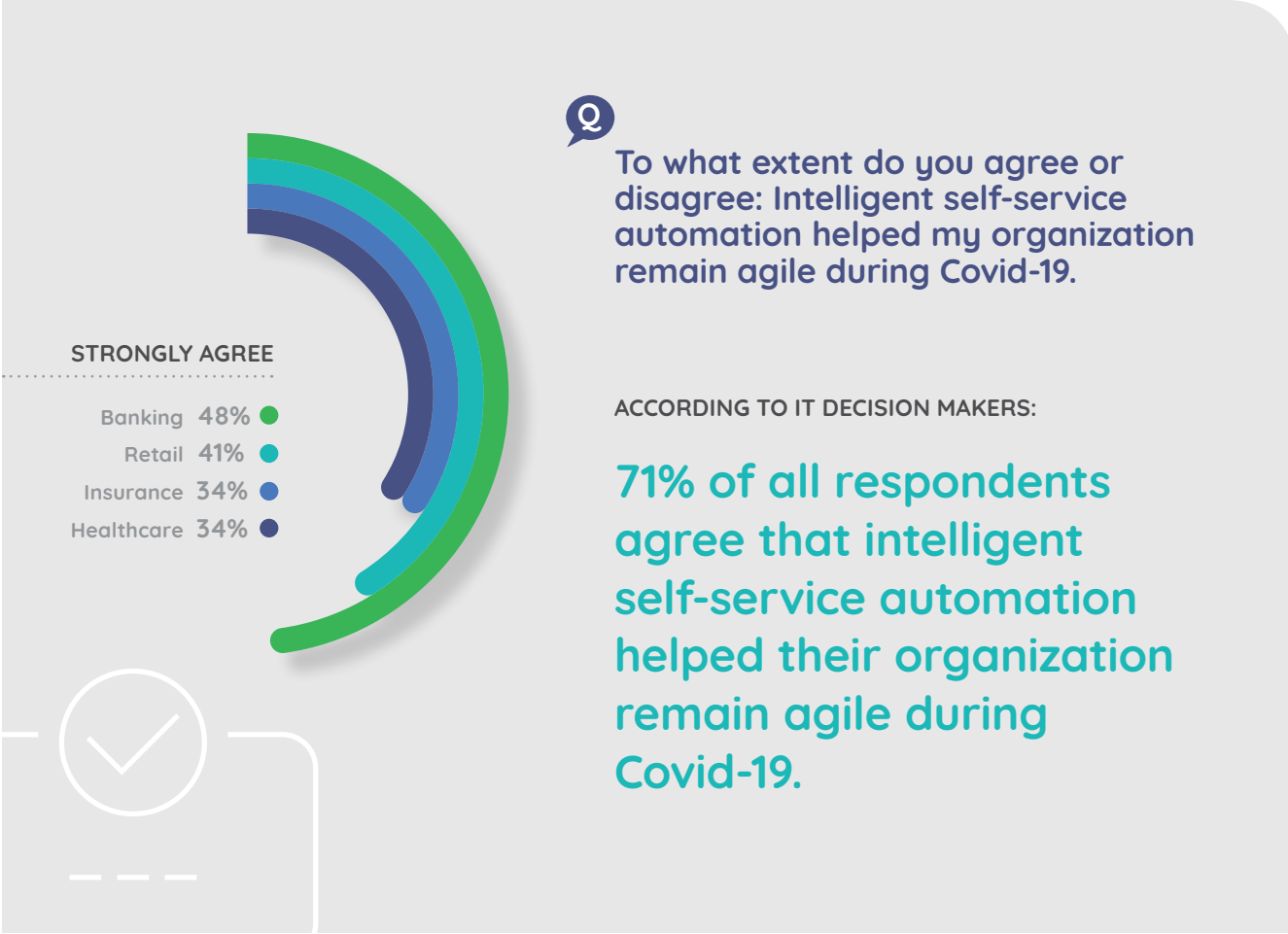


Organizations across all sectors recognize the value of intelligent self-service automation in adapting to the crisis.

Our research indicates that organizations across all sectors have benefited from automation technology, specifically intelligent self-service, and they recognize the value of these solutions in adapting to changes driven by Covid-19.

More than two-thirds (71%) of IT decision makers agree that intelligent self-service automation helped their organization remain agile during Covid-19. That number jumps to 87% in Banking, where 48% of respondents strongly agreed with the statement. Retail, Insurance and Healthcare respondents also agreed more strongly with that statement compared to the average respondent.

Among the 71% of respondents who agreed that self-service automation *would have* helped their organization remain agile during the crisis, Banking was again the sector where the most respondents (51%) strongly agreed. More than a third (37%) of Healthcare respondents and 49% of Retail respondents also strongly agreed.



2. Post-Pandemic Trends and Attitudes



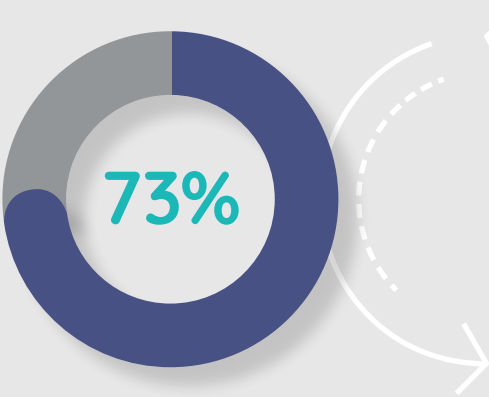
The majority of respondents agree that intelligent self-service automation has yielded a positive ROI for their organization.

Additionally, most organizations agreed that automating more customer support tasks had helped (70%) or would help (73%) improve customer relationships and loyalty. These results were again higher in Banking (nearly 90% agree with both statements) and Retail (more than 80% agree with both statements).

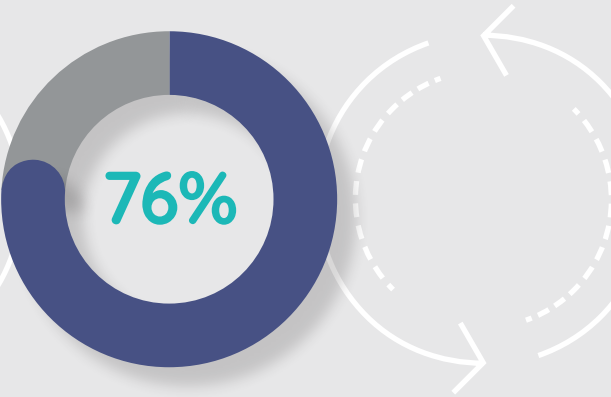
More than three-fourths of respondents (76%) agree that automating more customer support tasks has benefited their workforce. The same percentage agreed that this activity would benefit their workforce. In Retail, 93% of respondents agreed that automating more tasks would benefit their workforce, with 51% strongly agreeing, and 90% of Banking respondents agreed that these efforts had already benefited their workforce.

Finally, 68% of all respondents agree that intelligent self-service automation has yielded a positive ROI for their organization. In Banking, 82% of respondents agreed and 45% strongly agreed.

ACCORDING TO IT DECISION MAKERS:



73% agree that automating more customer support tasks would help improve customer relationships and loyalty.



76% agree that automating more customer support tasks would benefit their workforce.

3. Road to Resilience

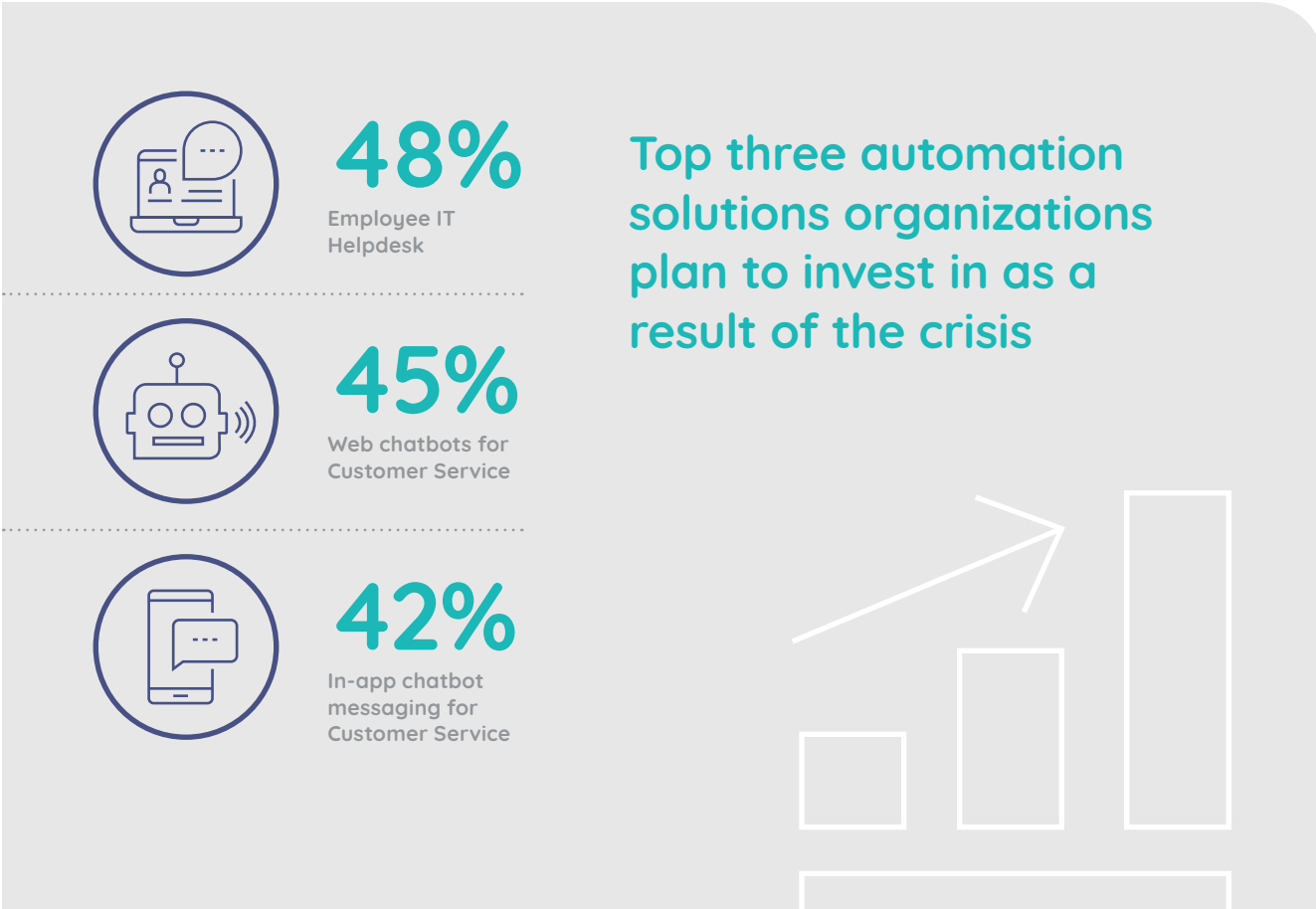


64% of IT decision makers expect their organization to increase investment in automation technology in the coming year as a result of Covid-19.

Given respondents' positive attitudes about the benefits of automation, it makes sense that 64% expect their organization to increase investment in automation technology in the coming year as a result of Covid-19. That number jumps to 88% in the Home Entertainment Sector. Insurance was the only industry in which most respondents (52%) expected investment in automation to remain the same or decrease.

Across all respondents planning to increase automation investments, 38% expect an increase of 1-10%, and more than a quarter (26%) will increase investments 11% or more. The sectors where the most respondents expect increases over 10% are Government (37%) and Healthcare (35%).

The top three automation solutions organizations plan to invest as a result of the crisis are Employee IT Helpdesk (48%), Web chatbots for customer service (45%) and In-app chatbot messaging (WhatsApp, Facebook Messenger, etc.) for customer service (42%).

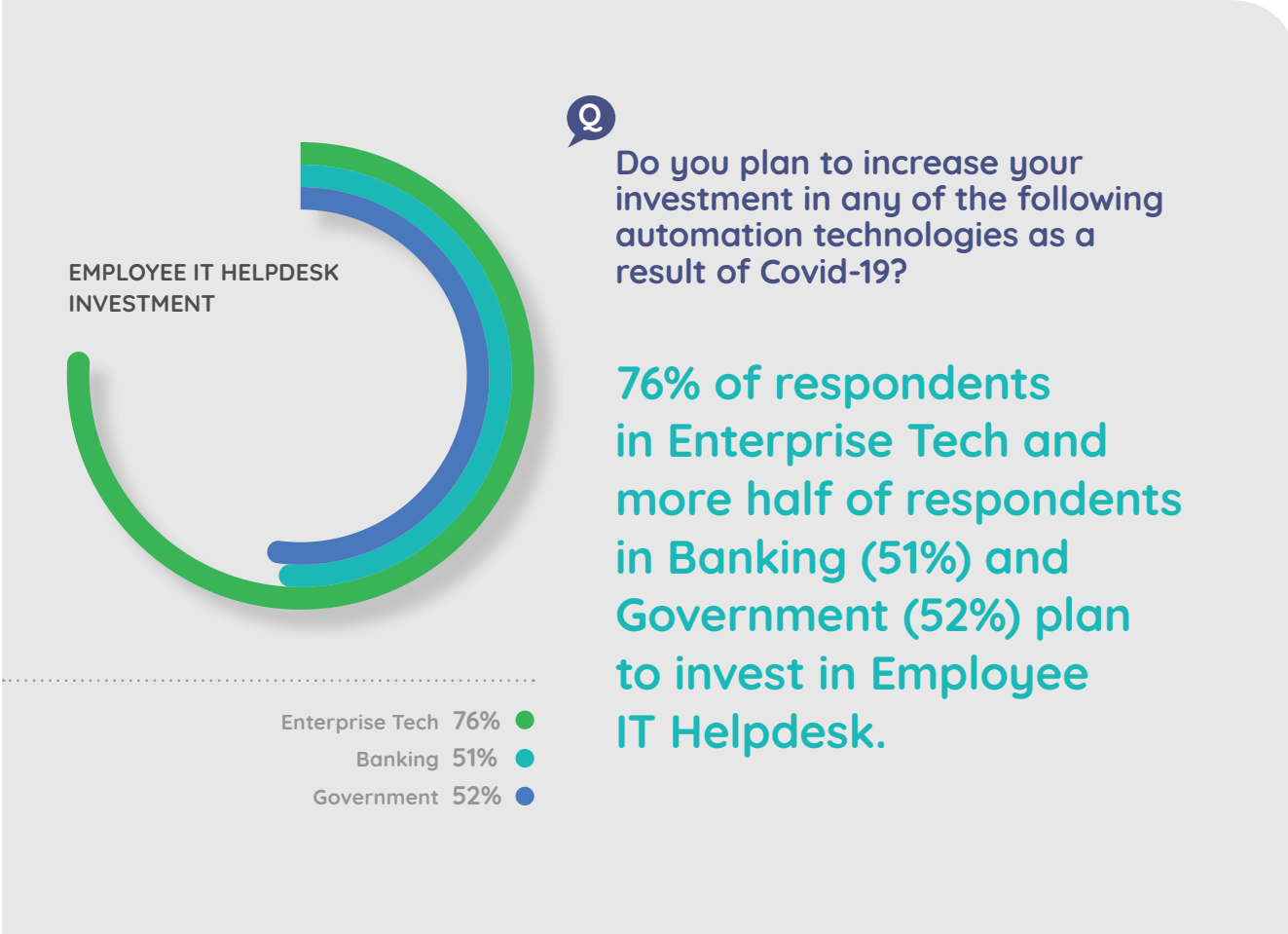


3. Road to Resilience



More than a third of organizations (34%) will invest in voice-based Intelligent Virtual Agents for customer service, 37% will invest in Interactive Voice Response (IVR), and 26% will invest in Robotic Process Automation. About three-fourths respondents (76%) in the Enterprise Tech sector and more half of respondents in Banking (51%) and Government (52%) plan to invest in Employee IT Helpdesk.

When respondents were asked about the business outcomes they are prioritizing in their automation strategies over the next year, increasing employee efficiency and productivity was the top priority, followed by reducing costs and improving the ability to meet customer demands. For Retail and Home Delivery, retaining customers is the top priority, and in Healthcare and Insurance, it is reducing costs.



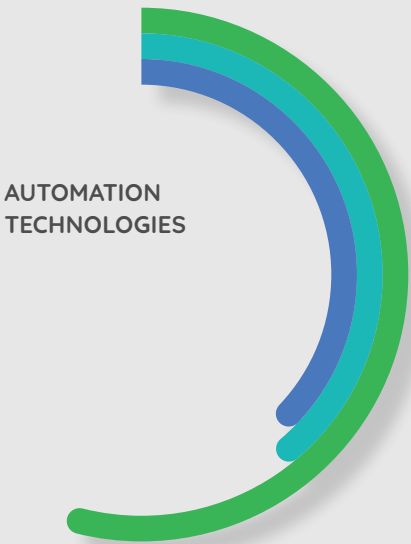
3. Road to Resilience



Respondents also see a need to invest in solutions that will better support their employees.

Interestingly, when respondents were asked which automation technologies and practices they expect to play a significant role in their organization's resilience over the next two years, 69% picked customer service automation, 54% picked employee service automation, 39% picked supply chain automation, and 37% picked Robotic Process Automation.

Our survey results indicate that although respondents recognize the impact customer experience will have on resilience, they also see a need to invest in solutions that will better support their employees as a result of the crisis. Perhaps the transition to remote working during Covid-19 identified gaps in employee support channels for many organizations.



Employee Self-Service	54%	●
Supply Chain	39%	●
Robotic Process	37%	●



Which automation technologies and practices will play a significant role in your organization's resilience over the next two years?

69% of IT decision makers say customer service automation will play a significant role in their organization's resilience.

4. Key Takeaways



1.

More than half (58%) of organizations have already implemented an automation strategy, and 54% rate their degree of automation above average compared to competitors.

However, less than half had automated any one of the 11 common customer and employee support tasks we asked them about in our survey. Additionally, a vast majority believe that automating more customer support tasks would improve customer relationships and loyalty and benefit their workforce.

2.

Most IT decision makers are planning to increase their investments in automation technology over the next year as a result of Covid-19, noting that intelligent self-service automation was key to adapting during the crisis.

They expect customer service automation and employee service automation to play the most significant role in their organizations' resilience over the next two years, and increasing employee productivity and efficiency is their top automation priority overall. Reducing costs and improving the ability to meet customer demands are also key priorities.

3.

Three-fourths of organizations agree that tools that allow them to build and manage their own applications are key to their automation strategy.

These tools could help organizations tackle their top three barriers to adopting automation: cost, reliance on professional services due to the complexity of implementation, and time to development.

IT decision makers should consider cloud-based, code-free platforms that make it easy to develop and deploy automated customer- and employee-facing self-service applications over voice, chat and messaging channels.

5. About Inference Solutions



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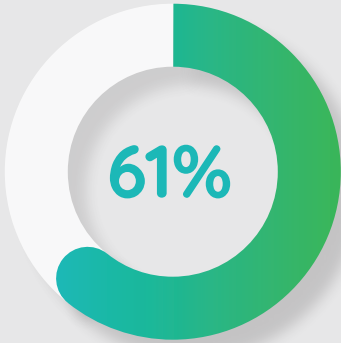
Inference Solutions is a global Intelligent Virtual Agent platform that enables businesses to leverage the latest conversational AI technology with unmatched choice and flexibility. More than 550 organizations across every vertical use Inference’s code-free platform to rapidly design and deploy advanced self-service applications over voice, chat and messaging channels.

Inference is resold through leading telecommunications carriers, Unified Communications and Contact Center providers, and is the trusted choice for dozens of service providers seeking to drive more revenue and differentiate themselves with value-added-services.



6. Appendix: Industry Profiles

Banking



Plan to increase their investment in automation technology in the coming year as a result of COVID-19



Will invest in

- 51% Employee IT Helpdesk
- 49% Voice-based virtual agents
- 48% In-app chatbot

Top 3 automation priorities

- 1 Increasing employee efficiency and productivity
- 2 Improving ability to meet customer demands
- 3 Reducing costs

More than 80% expect customer service automation to play a significant role in resilience in the next 2 years.



Intelligent self-service automation helped agility during COVID-19



AGREE

Automating more customer support tasks has helped improve customer relationships and loyalty



AGREE

Automating more customer support tasks would benefit workforce



AGREE

Tools that allow for building and managing their own applications are important to automation strategy



AGREE

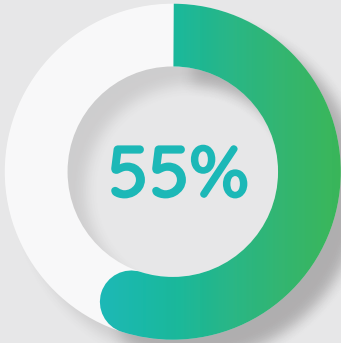
Intelligent self-service automation has yielded a positive ROI



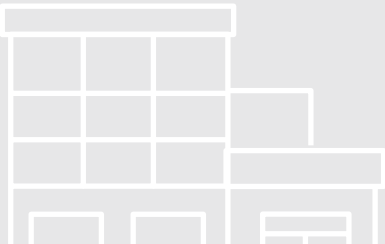
AGREE

6. Appendix: Industry Profiles

Enterprise Technology



Plan to increase their investment in automation technology in the coming year as a result of COVID-19



Will invest in

- 76% Employee IT Helpdesk
- 73% In-app chatbot
- 64% Web chatbot

Top 3 automation priorities

- 1 Increasing employee efficiency and productivity
- 2 Improving ability to meet customer demands
- 3 Driving more revenue from existing customers

More than 80% expect customer service automation to play a significant role in resilience in the next 2 years.



Intelligent self-service automation helped agility during COVID-19



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Tools that allow for building and managing their own applications are important to automation strategy



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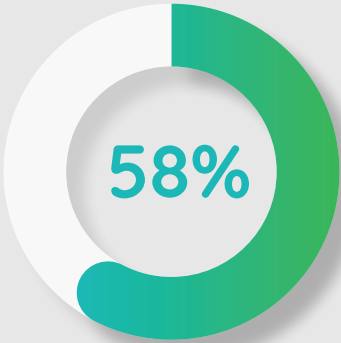
Intelligent self-service automation has yielded a positive ROI



AGREE

6. Appendix: Industry Profiles

Government



Plan to increase their investment in automation technology in the coming year as a result of COVID-19



Will invest in

- 52% Employee IT Helpdesk
- 38% Web chatbot
- 28% In-app chatbot

Top 3 automation priorities

- 1 Increasing employee efficiency and productivity
- 2 Improving ability to meet customer demands
- 3 Reducing costs

More than 60% expect customer service automation to play a significant role in resilience in the next 2 years.



Intelligent self-service automation helped agility during COVID-19



AGREE

Automating more customer support tasks has helped improve customer relationships and loyalty



AGREE

Automating more customer support tasks would benefit workforce



AGREE

Tools that allow for building and managing their own applications are important to automation strategy



AGREE

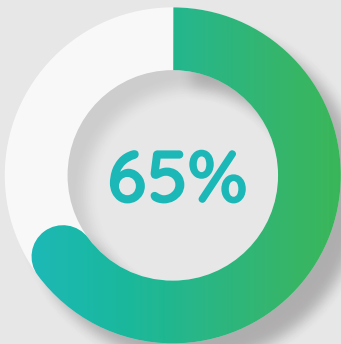
Intelligent self-service automation has yielded a positive ROI



AGREE

6. Appendix: Industry Profiles

Healthcare



Plan to increase their investment in automation technology in the coming year as a result of COVID-19



Will invest in

- 51% Web chatbot
- 40% Employee IT Helpdesk
- 33% Interactive Voice Response

Top 3 automation priorities

- 1 Reducing costs
- 2 Retaining customers
- 3 Improving ability to meet customer demands

More than 60% expect customer service automation to play a significant role in resilience in the next 2 years.



Intelligent self-service automation helped agility during COVID-19



AGREE

Automating more customer support tasks has helped improve customer relationships and loyalty



AGREE

Automating more customer support tasks would benefit workforce



AGREE

Tools that allow for building and managing their own applications are important to automation strategy



AGREE

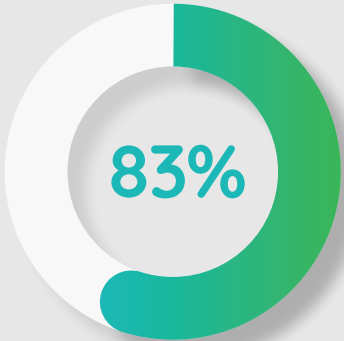
Intelligent self-service automation has yielded a positive ROI



AGREE

6. Appendix: Industry Profiles

Home Delivery



Plan to increase their investment in automation technology in the coming year as a result of COVID-19



Will invest in

- 42% Employee IT Helpdesk
- 37% Web chatbot
- 37% In-app chatbot

Top 3 automation priorities

- 1 Retaining customers
- 2 Improving profit margins
- 3 Reducing costs

More than 50% expect customer service automation to play a significant role in resilience in the next 2 years.



Intelligent self-service automation helped agility during COVID-19



Automating more customer support tasks has helped improve customer relationships and loyalty



Automating more customer support tasks would benefit workforce



Tools that allow for building and managing their own applications are important to automation strategy

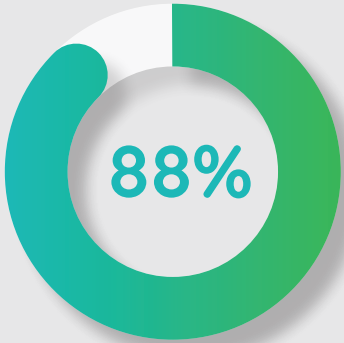


Intelligent self-service automation has yielded a positive ROI



6. Appendix: Industry Profiles

Home Entertainment



Plan to increase their investment in automation technology in the coming year as a result of COVID-19



Will invest in

- 48% In-app chatbot
- 42% Employee IT Helpdesk
- 40% Interactive Voice Response

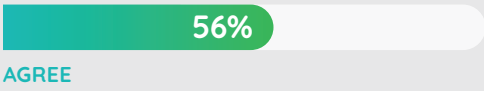
Top 3 automation priorities

- 1 Increasing employee efficiency and productivity
- 2 Improving profit margins
- 3 Retaining customers

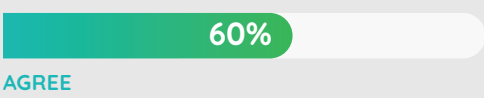
More than 50% expect customer service automation to play a significant role in resilience in the next 2 years.



Intelligent self-service automation helped agility during COVID-19



Automating more customer support tasks has helped improve customer relationships and loyalty



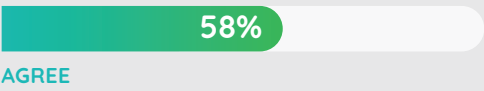
Automating more customer support tasks would benefit workforce



Tools that allow for building and managing their own applications are important to automation strategy

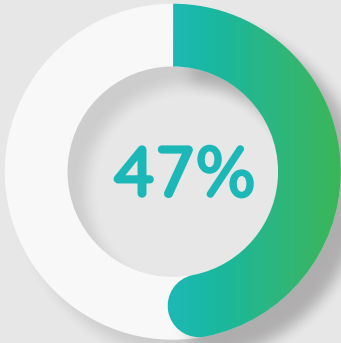
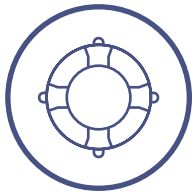


Intelligent self-service automation has yielded a positive ROI

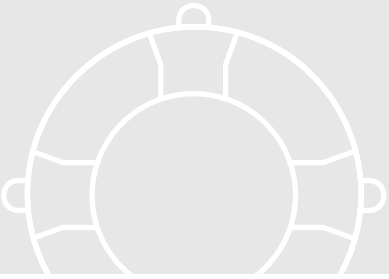


6. Appendix: Industry Profiles

Insurance



Plan to increase their investment in automation technology in the coming year as a result of COVID-19



Will invest in

- 36% Web chatbot
- 36% Voice-based virtual agents
- 34% Interactive Voice Response

Top 3 automation priorities

- 1 Reducing costs
- 2 Improving ability to meet customer demands
- 3 Retaining customers / Increasing employee efficiency and productivity

More than 70% expect customer service automation to play a significant role in resilience in the next 2 years.



Intelligent self-service automation helped agility during COVID-19



AGREE

Automating more customer support tasks has helped improve customer relationships and loyalty



AGREE

Automating more customer support tasks would benefit workforce



AGREE

Tools that allow for building and managing their own applications are important to automation strategy



AGREE

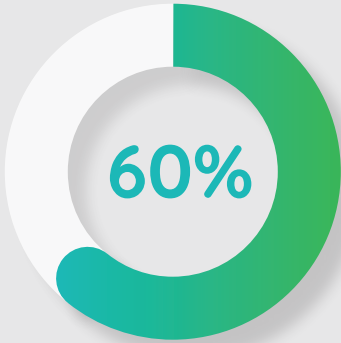
Intelligent self-service automation has yielded a positive ROI



AGREE

6. Appendix: Industry Profiles

Retail



Plan to increase their investment in automation technology in the coming year as a result of COVID-19



Will invest in

- 62% Web chatbot
- 51% In-app chatbot
- 50% Employee IT Helpdesk

Top 3 automation priorities

- 1 Retaining customers
- 2 Increasing employee efficiency and productivity
- 3 Improving ability to meet customer demands

More than 70% expect customer service automation to play a significant role in resilience in the next 2 years.



Intelligent self-service automation helped agility during COVID-19



AGREE

Automating more customer support tasks has helped improve customer relationships and loyalty



AGREE

Automating more customer support tasks would benefit workforce



AGREE

Tools that allow for building and managing their own applications are important to automation strategy



AGREE

Intelligent self-service automation has yielded a positive ROI



AGREE

