

A Forrester Consulting
Thought Leadership Paper
Commissioned By UiPath

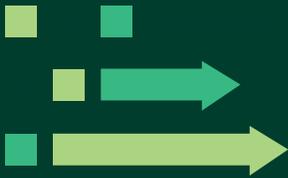
April 2020

The Future Of Work Is Still Being Written: A Regional Spotlight

Country Results From The January 2020
Thought Leadership Paper, “The Future Of Work
Is Still Being Written”



The impact of automation on the future of work is global.



Maximizing the value of automation requires addressing skill gaps.

Introduction

THE WORLD OF WORK IS CHANGING, AND THAT'S A GOOD THING

Organizations will inevitably experience a myriad of disruption and change owing to the rise of automation. Continuous development of automation will engender higher productivity, economic growth and greater efficiency. Whilst there are many notable positives, automation does raise concerns and questions about the broader impact it can have on jobs, skills, wages, and even the nature of work itself.

Through a geographic lens: All economies stand to gain exponential productivity improvements. Even though the pace and adoption will vary from country to country, no geography will remain untouched. There are already large differences emerging between countries; The US, Japan and UK are in the midst of expanding robotic process automation (RPA) implementation, while countries like France and Germany are planning to implement automation within the next 12 months. This may well be accelerated as a result of the COVID-19 pandemic.

In July 2019, UiPath commissioned Forrester Consulting to evaluate the impact of automation and how firms are better planning and preparing for the future while also considering the employee experience (EX).

KEY FINDINGS

- › **Investment in automation will continue to rise and grow.** While investment is increasing across all countries surveyed, the key RPA capabilities prioritized by each country slightly differ – these range from software testing tasks to deploying chatbots, and include text analytics, natural language processing and many more.
- › **Digital skills gap is a concern for all regions.** With automation advancing, concern about outdated or missing digital skills is rising. Across the globe, bridging that gap will be required to help employees overcome fear around automation, upskill, and ultimately embrace automation as a productivity-boosting asset.
- › **Tracking employee anxiety helps manage change.** Measuring employee anxiety around automation is viewed by surveyed organizations as a positive tool to making data driven decision – especially when refining change management processes related to automation.
- › **Education in the workplace will boost career prospects, but firms should turn to partners to help guide their organization.** Companies will introduce a plethora of internal and external training activities to educate their workforce around automation and develop associated skillsets. Preferences on training activities vary per country and include internal mentoring, workplace certifications, and more.
- › **As the COVID-19 threat flattens, organizations will look to mitigate future risks to their operations.** ‘Future of work’ activities will become an imperative as companies reassess their physical office assts as a result of many employees working from home during the pandemic. Automation use will accelerate as a result.

Investment In Automation Will Continue To Rise And Grow

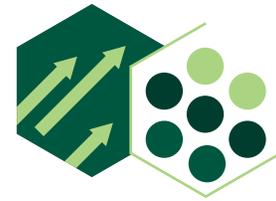
For 65% of countries RPA spend is going to increase by an average of 5%. With the US increasing spending the most (77%) and Germany the least (43%). Across the five countries (France, Germany, Japan, UK and the US), priorities around investing in RPA follow similar use cases; however, there are nuances:

- › **US decision makers will invest in automation to support text analytics and self-service capabilities.** In the US the increase in investment in automation will be used to support both employees and customers with particular focus on text analytics and natural language processing, as well as applying RPA to enable self-service in emerging channels including mobile apps, social media and mobile messaging.
- › **RPA investment in Germany will go towards better employee support.** Germany's main focus, however, will be in adopting RPA for the purposes of speech and text communication using chatbots to support employees.
- › **Supporting IT tasks with automation will be center stage in the UK.** Compared to other countries within the study, the UK is investing the least in “attended mode meaning to augment customer service agents e.g. remove routine, existing customer agents’ tasks”; but investing the most in using automation to support IT tasks including software testing, password resetting, or help desk issues.

DIGITAL SKILLS GAP IS A CONCERN FOR ALL REGIONS

Across all geographies, the majority of employees are concerned about the impact the increased use of automation will have on their jobs.

- › **UK employees are afraid their digital skills are not future-ready...** In particular, nearly half of employees in the UK are slightly concerned that their existing digital skills may not match what their job will require in future.
- › **...but their apprehension is not shared everywhere.** Interestingly, over two fifths of employees in France and the US are concerned about their ability to succeed at their existing job but are not interested in advancing their digital skills (see Figure 1).
- › **The rapid growth of RPA makes it more difficult for employees to stay up to date with their skillset.** The above may be a reflection of how rapidly workers are affected by the swift development of automation-related technologies. For example, 43% of French organizations estimate that their employees’ roles will be impacted by advancing automation every 12-18 months. Whereas over a third of organizations in the US believe that such impacts will happen to their employees during a 6-12 month period (see Figure 2).
- › **Automation training will play a key role in bridging the skill gap.** The common denominator is that all organizations, across the globe, will have to address the growing skills gaps by training, reskilling and educating those employees who are willing to learn.



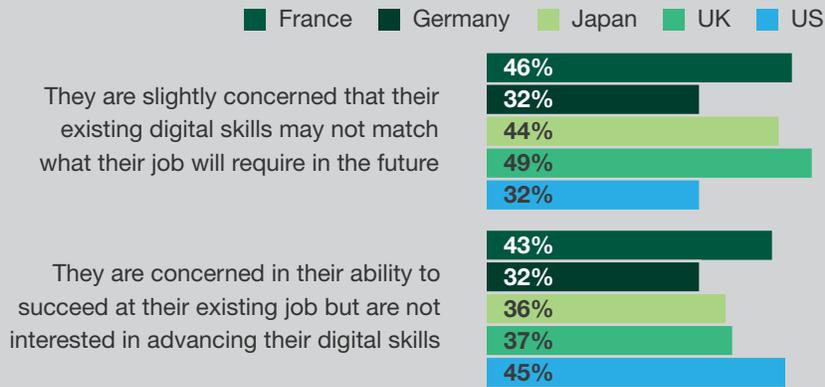
Investment in RPA solutions is increasing across all surveyed geographies.



With automation advancing, concern around existing digital skills is growing.

Figure 1

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

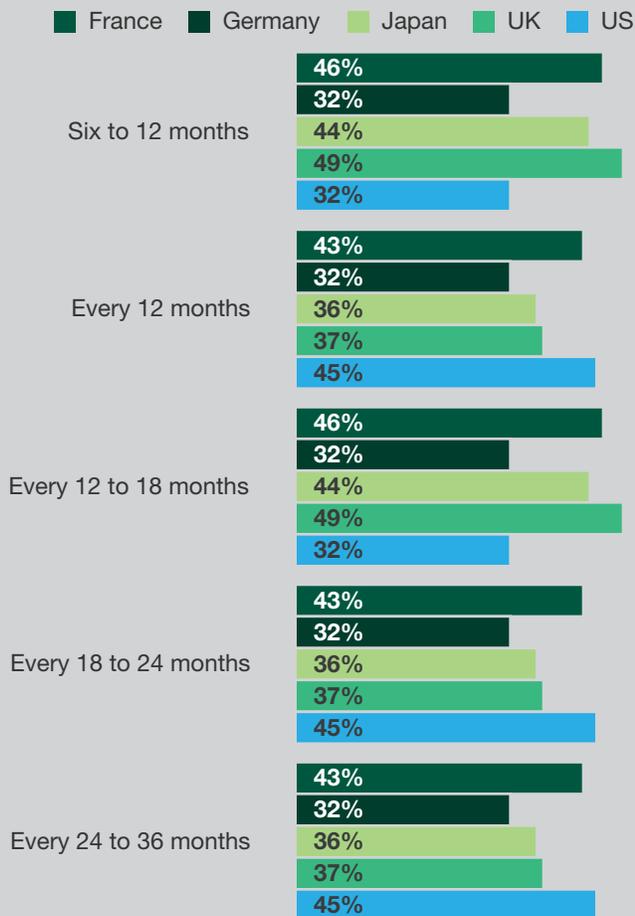


Base: 54 French, 53 German, 50 Japanese, 57 UK, and 56 US respondents at the manager level or above from operations groups, shared services, finance/accounting, and other lines of business

Source: A commissioned study conducted by Forrester Consulting on behalf of UiPath, November 2019

Figure 2

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



Base: 54 French, 53 German, 50 Japanese, 57 UK, and 56 US respondents at the manager level or above from operations groups, shared services, finance/accounting, and other lines of business

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TRACK EMPLOYEE ANXIETY TO HELP MANAGE CHANGE

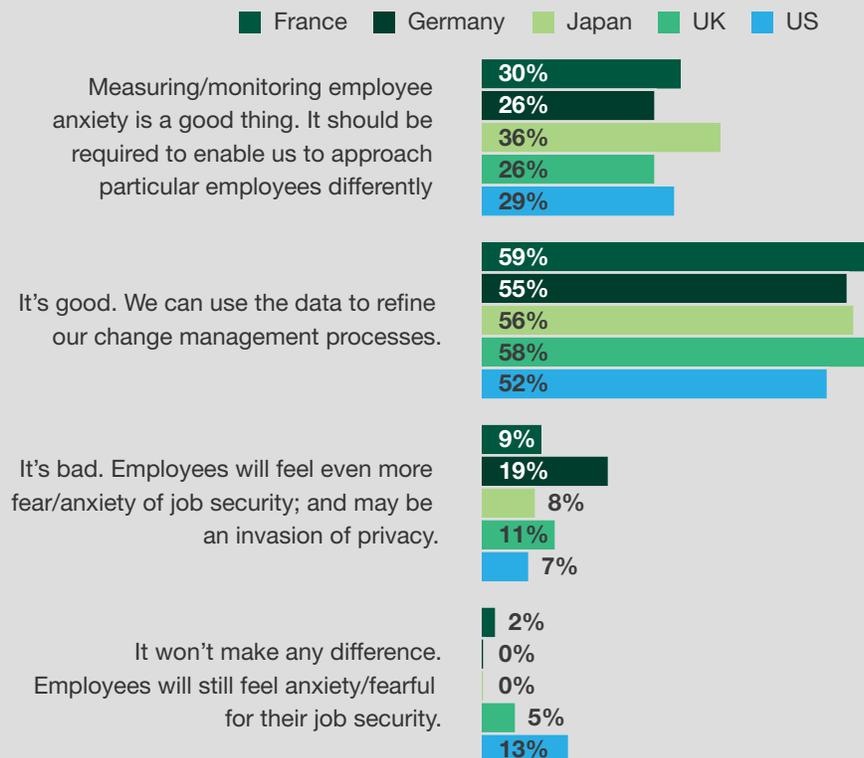
- > **Monitoring employee anxiety metrics is supporting RPA change management.** The majority of organizations globally see the measurement of employee anxiety surrounding automation as a positive tool to making data driven decisions to aid and refine change management process.
- > **Decision makers are using data on employee anxiety as an actionable insight.** This is particularly the case in the UK and Japan, where over 50% of organizations say that monitoring their employees' anxiety is important because it will enable them to adopt a different approach (see Figure 3).
- > **Employee anxiety data is only one of the many metrics informing change management processes.** It must be noted, although data is important in the change management process, organizations across the global do not view measuring employee anxiety around automation as critical to the change management process (see Figure 3).



Increasing investment in RPA requires improved change management processes.

Figure 3

“How do you feel about measuring/monitoring employee anxiety?”



Base: 54 French, 53 German, 50 Japanese, 57 UK, and 56 US respondents at the manager level or above from operations groups, shared services, finance/accounting, and other lines of business

Source: A commissioned study conducted by Forrester Consulting on behalf of UiPath, November 2019

Education In The Workplace Will Boost Career Prospects, But Firms Should Turn To Partners To Help Guide Their Organization

Across the globe many organizations recognize that education is required to cope with the potential effects of automation on employees' experience. Per country, there is a tendency to gravitate toward introducing specific activities in the workplace to help alleviate employees' concern:

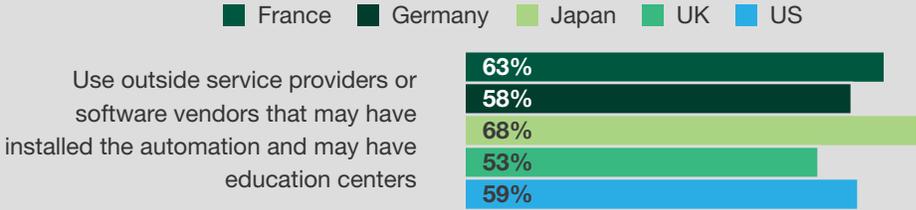
- > **The UK and Germany focus on forward-looking training programs.** In order to improve their employees' working experience, both countries prioritize increasing their employees' current skillset to keep up with the evolving nature of technology.
- > **The US and France plan to mitigate the potential effects of automation by providing employees with the latest technology.** Keeping technology current or refreshing technology faster for employees to feel more satisfied and fulfilled at work, ranks as the most successful activity in these two regions to preserving and preventing automation from negatively impacting the employee experience.
- > **Japanese companies turn to workplace certifications.** Decision makers in Japan will explore and implement workplace certifications for digital and machine skills that are transferable to other work or life advancement.
- > **Across the globe, organizations will partner with external providers to leverage their training capabilities.** The majority of organizations believe that the use of external service providers or software vendors that have installed automation and may have education centres would be great to leverage as a means of training existing or new employees for new automation-focused roles (see Figure 4).



Training activity preferences differ per geographies.

Figure 4

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



Base: 54 French, 53 German, 50 Japanese, 57 UK, and 56 US respondents at the manager level or above from operations groups, shared services, finance/accounting, and other lines of business
 Source: A commissioned study conducted by Forrester Consulting on behalf of UiPath, November 2019

LOOK AT EXPERTS TO EXTEND AUTOMATION TRAINING

- › **Employees will spread the automation knowledge within their organizations.** At 70%, German organizations feel that employee collaboration and internal mentoring is also integral to employee training on automation.
- › **Automation skills learned at university will be sought after.** Although educating employees is a necessary endeavor with the development of automation. Data suggests a preference for humans' first interaction with machine intelligence to start at the college or university level. 70% of German organizations in particular, emphasize a preference for a collegiate level introduction to machine intelligence.
- › **Acquisition of automation skills will be recognized and celebrated.** American organizations are particularly inclined to take on a role in boosting their employees' career prospects, with 70% believing it will have major beneficial effects to introduce new formal work certifications/vocations for different levels of automation aptitude with graduation ceremonies.
- › **External certifications from SMEs will gain visibility.** Similarly, Japanese organizations also believe there to be major beneficial effects in introducing certification programs; however, Japanese organizations believe these should be carried out by the technology vendors with whom they are partnered with.

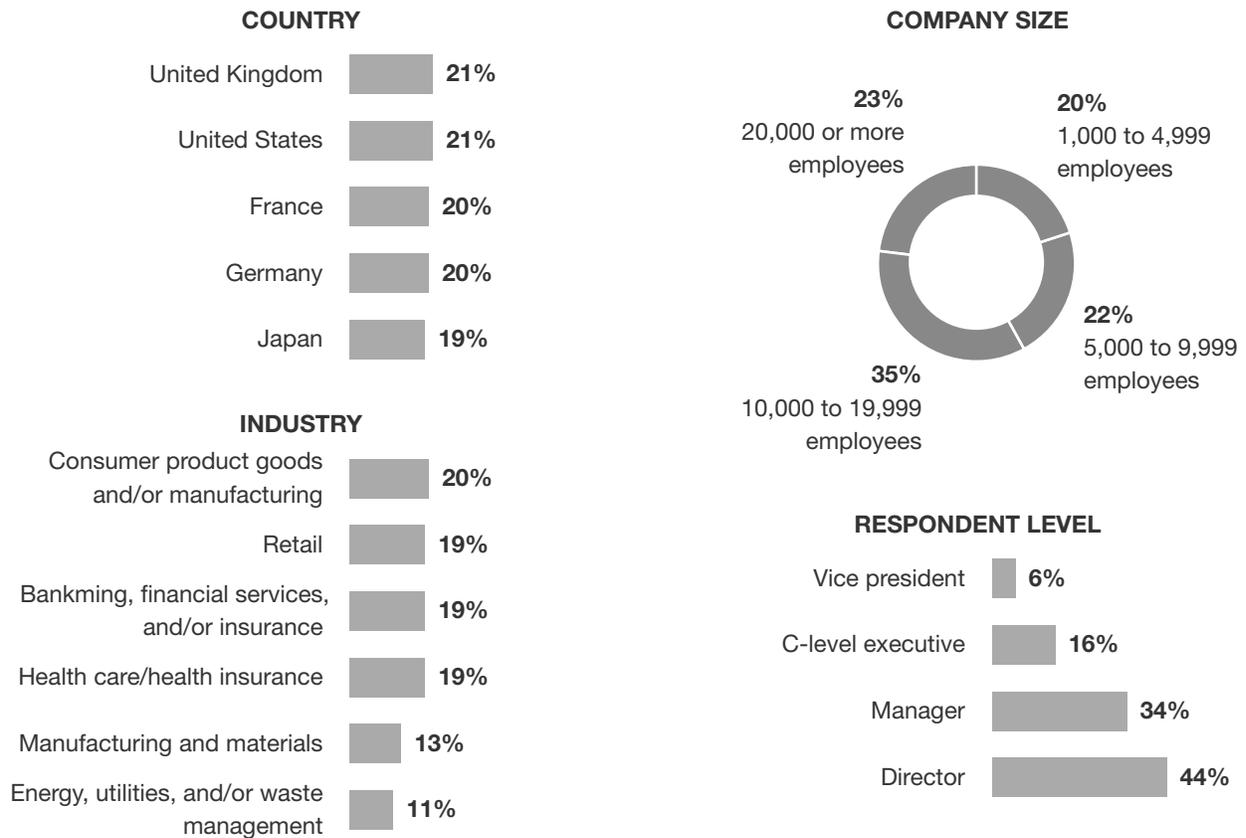


Organizations will craft an RPA knowledge ecosystem with universities and service providers.

Appendix A: Methodology

In this study, Forrester conducted an online survey of 270 manager level or above from operations groups, shared services, finance, and other lines of business. Forrester also supplemented the online survey with 10 in-depth qualitative interviews across France, Germany, the UK, and the US. The study sought to evaluate what organizations are doing to embrace automation, train employees, and recruit talent. Survey participants included decision makers for automation strategy and its initiatives. Questions provided to the participants asked what the automation priorities are, challenges and benefits of the technology. Additionally, organizations were asked how they plan to manage the change management process and what steps they are taking to hire for automation-based roles. The study began in October 2019 and was completed in March 2020.

Appendix B: Demographics/Data



Base: 270 manager level or above from operations groups, shared services, finance/accounting and other lines of business

Note: Percentages may not total 100 because of rounding.

Source: A commissioned study conducted by Forrester Consulting on behalf UIPatch, November 2019

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