Process Modernization in 2022

The reasons, benefits, and challenges of RPA re-platforming

blueprint®

Key Statistics

43 % report better capabilities and features as the biggest benefit experienced by switching RPA tools

61 % re-platformed their automation portfolios to a new RPA tool using a third-party vendor

Of those considering a new RPA platform, Microsoft Power Automate **(40%)** is the most popular

74% of respondents still using their original RPA tool are in the process of or are considering switching platforms

Specialized resources and **rebuilding automated processes** pose the biggest challenges to switching RPA tools

10 months is the average time it took to re-platform automation estates

blueprint

TABLE OF CONTENTS

blueprint®

01

OVERVIEW

- About this research
- Methodology
- What is automation re-platforming?

blueprint

About this Research

Process improvement has been a focal point in every business for several decades; however, the methods and mechanisms to deliver on it have changed over time.

Process modernization and automation have become key process improvement strategies that now dominate a company's efforts to deliver on their business objectives. Key to both those strategies is a trend where organizations are looking to new and different platforms for process modernization and automation.

This report explores:
- ✓ What's driving companies to re-platform their automations
- ✓ The most common tools companies are moving to
- ✓ The logistics and challenges of switching RPA tools

blueprint

Methodology

To examine the state of automation redeployments and process modernization by switching RPA tools, Blueprint commissioned a survey of 400 Executives, Directors, Department Heads, Senior Managers, and Analysts from the United States, the United Kingdom, Canada, France, and Germany. The research was performed in February and March of 2022 using an email invitation and an online survey.

Those surveyed were from companies ranging from 1,000-10,000+ employees representing the following industries and departments.

This research was done in partnership with: SAPIO RESEARCH

INDUSTRIES	DEPARTMENTS
FINANCIAL SERVICES	FINANCE & ACCOUNTING
BANKING	IT
HEALTHCARE/PHARMA/LIFE SCIENCES	OPERATIONS
INSURANCE	HR
TELECOMS	INNOVATION/DIGITIAL TRANSFORMATION/DIGITAL OPERATIONS
OIL & GAS	EXECUTIVE LEADERSHIP
UTILITIES	AUTOMATION/INTELLIGENT AUTOMATION/RPA

blueprint

What is Automation Re-platforming?

This research focuses on automation re-platforming.

Automation re-platforming is the process of moving and redeploying an organization's automated processes from one RPA platform to another. For example, moving all automations from Automation Anywhere into Microsoft Power Automate.

Traditionally, re-platforming automations has been challenging, time-consuming, and expensive because the major RPA tools build process automations in different ways. For one automation to work in another RPA platform, it first had to be analyzed. A highly-skilled technical resource had to understand exactly what it did and then rebuild it from scratch to make it compatible with the destination RPA platform. Even with those challenges, many organizations are still eager to re-platform their automation estates if they haven't already.

blueprint®

02

THE REASONS FOR

RE-PLATFORMING

- Why organizations want to re-platform
- Benefits of re-platforming
- Demand & Sponsorship

blueprint

Process Modernization: Why organizations want to re-platform

One of the key objectives of this research was to understand why so many organizations have already or are eagerly in the process of re-platforming their automated processes to another RPA tool.
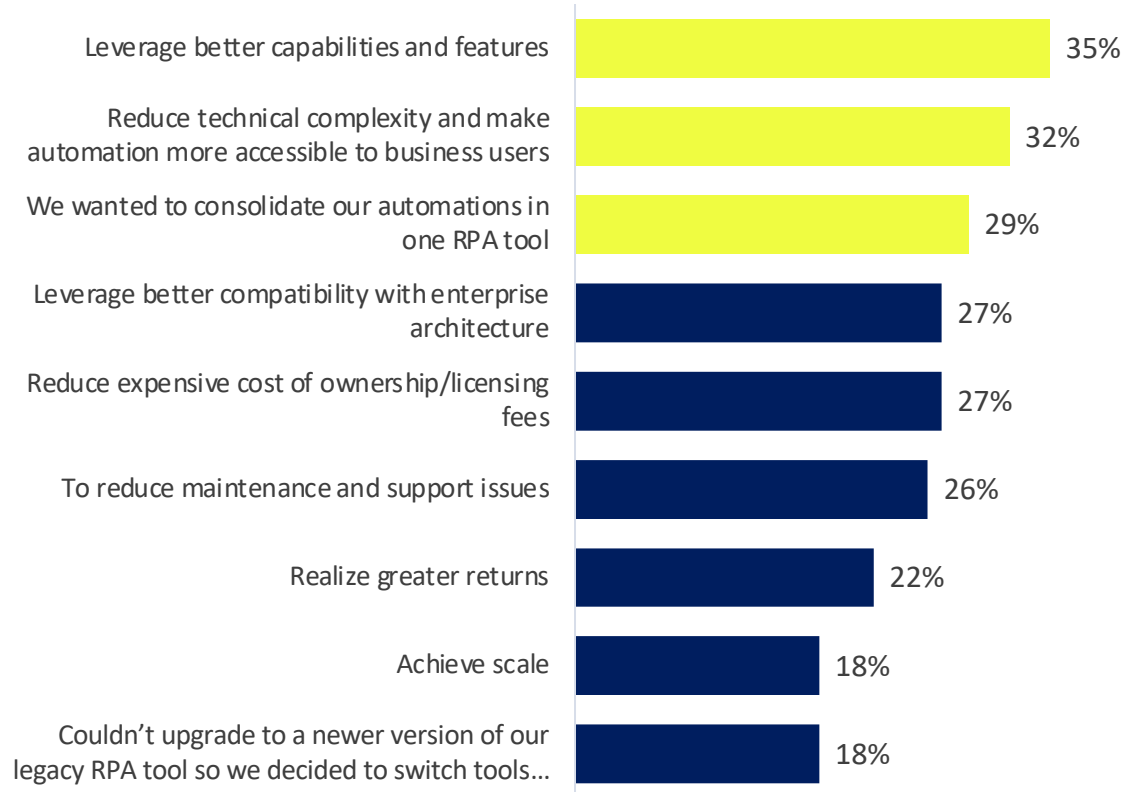
While there are many reasons driving re-platforming, the most common relate to wanting to leverage better capabilities and features.

Organizations began their automation journey on first-generation platforms. With next-generation tools rolling out better feature-functionality that allow automation programs to automate more complex processes and make the design, development, and deployment of automations more accessible, companies are increasingly looking to leverage newer, more powerful automation platforms to realize scale and increase ROI.
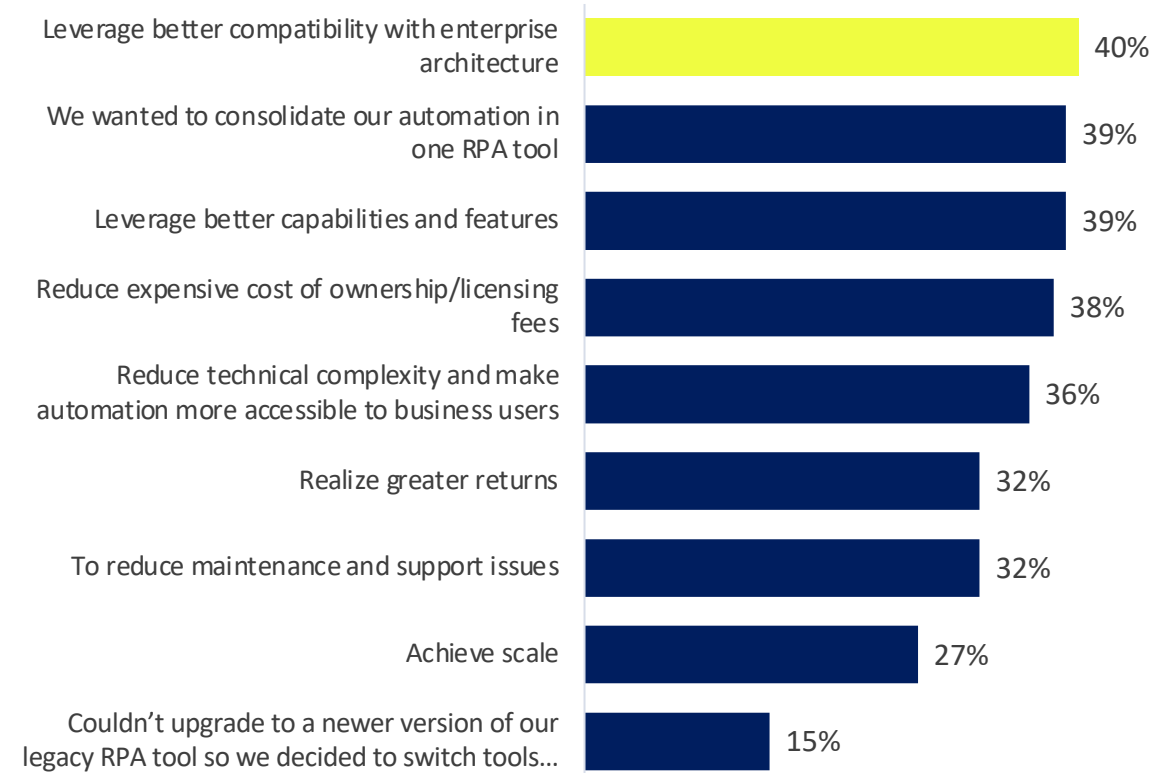
Wanting to leverage better capabilities and features, and reducing the complexity of automation were the most cited reasons for switching RPA tools

blueprint

Process Modernization: Why organizations want to re-platform

Organizations who have already switched RPA tools

Category	Percentage
Leverage better capabilities and features	35%
Reduce technical complexity and make automation more accessible to business users	32%
We wanted to consolidate our automations in one RPA tool	29%
Leverage better compatibility with enterprise architecture	27%
Reduce expensive cost of ownership/licensing fees	27%
To reduce maintenance and support issues	26%
Realize greater returns	22%
Achieve scale	18%
Couldn't upgrade to a newer version of our legacy RPA tool so we decided to switch tools…	18%

Organizations in the process of switching RPA tools

Category	Percentage
Leverage better compatibility with enterprise architecture	40%
We wanted to consolidate our automation in one RPA tool	39%
Leverage better capabilities and features	39%
Reduce expensive cost of ownership/licensing fees	38%
Reduce technical complexity and make automation more accessible to business users	36%
Realize greater returns	32%
To reduce maintenance and support issues	32%
Achieve scale	27%
Couldn't upgrade to a newer version of our legacy RPA tool so we decided to switch tools…	15%

blueprint

Process Modernization: Consolidation

One of the assumptions believed to be motivating automation re-platforming was the desire to consolidate automation development & deployment into a single RPA platform.

For a variety of reasons, organizations have found themselves using multiple RPA tools ranging from compatibility with different parts of enterprise architectures, specialization for department-specific automations like automating finance processes, and different business units adopting automation and their own RPA tools at different times.

While consolidating automation into one RPA tool remains a primary motivator for automation re-platforming (29% of those who've already switched cite it as a primary reason, while 39% of those in the process of switching RPA tools report it to be a primary driver), 74% of organizations using a multi-platform strategy report they will be maintaining multiple RPA tools for the foreseeable future, suggesting specialization, compatibility, and business unit preferences still have a place in automation programs moving forward.

74% of organizations using a multi-platform strategy report they will be maintaining multiple RPA tools for the foreseeable future
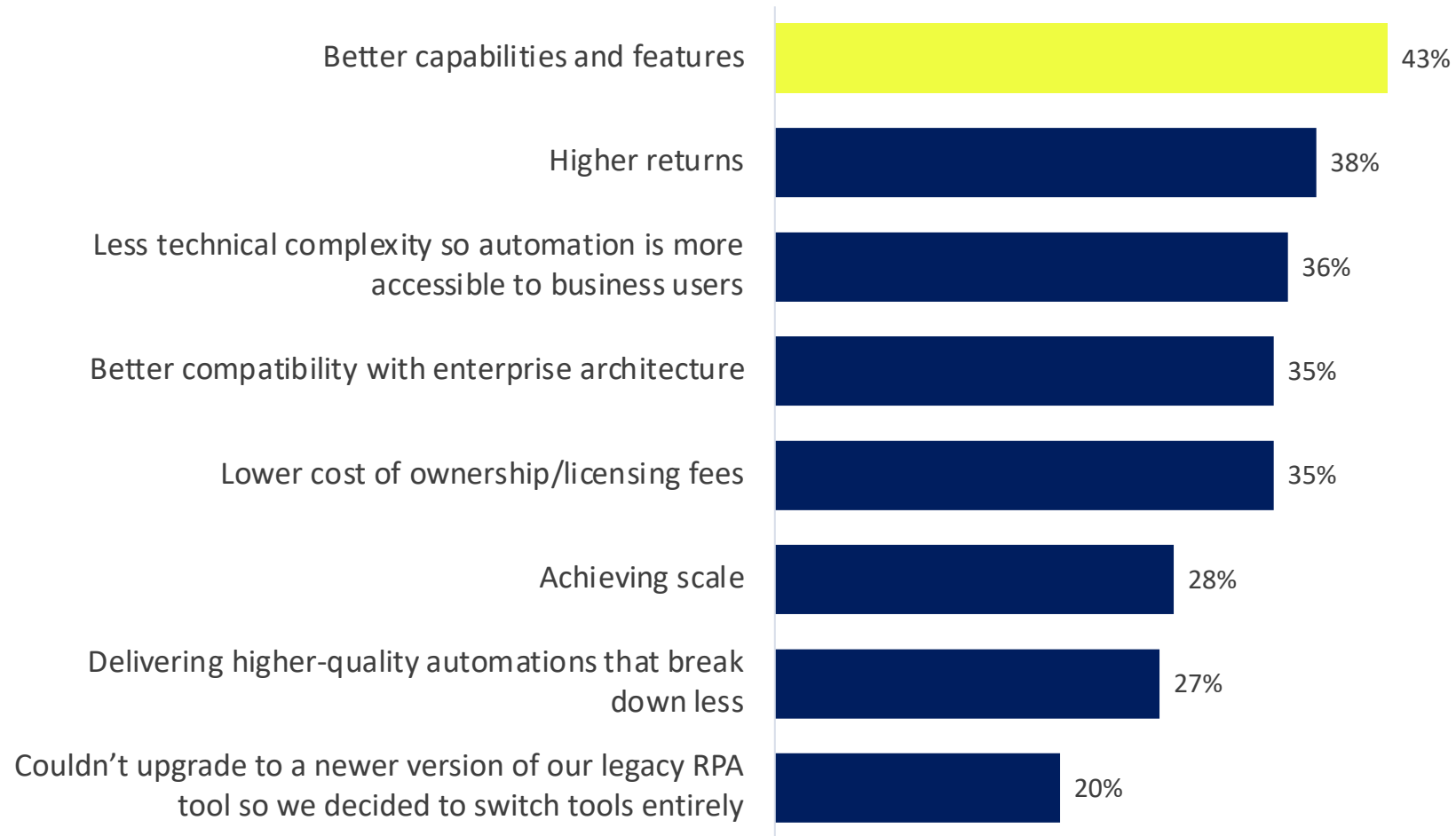
blueprint

Process Modernization: The benefits of re-platforming

For the organizations that have already switched automation platforms, the biggest benefits they experienced were better capabilities and features (43%), higher returns (38%), and less technical complexity to make automation more accessible to the average business user (36%).

Equally as important was the benefit of better compatibility with enterprise architecture which was a primary motivator for re-platforming, in addition, lowering the cost of ownership was highlighted as organizations look for better, more cost-effective licensing models for their automation practice.

The biggest benefit for organizations that have already switched RPA tools was better capabilities and features (43%) and higher returns (38%).

blueprint

Process Modernization: Benefits experienced after re-platforming

Benefit	Percentage
Better capabilities and features	43%
Higher returns	38%
Less technical complexity so automation is more accessible to business users	36%
Better compatibility with enterprise architecture	35%
Lower cost of ownership/licensing fees	35%
Achieving scale	28%
Delivering higher-quality automations that break down less	27%
Couldn't upgrade to a newer version of our legacy RPA tool so we decided to switch tools entirely	20%

blueprint

Process Modernization: Demand & Sponsorship

For both the organizations that have already re-platformed and those in the process of doing so, IT is the most common department driving the demand to switch. Finance & Accounting is the department most likely to sponsor re-platforming.
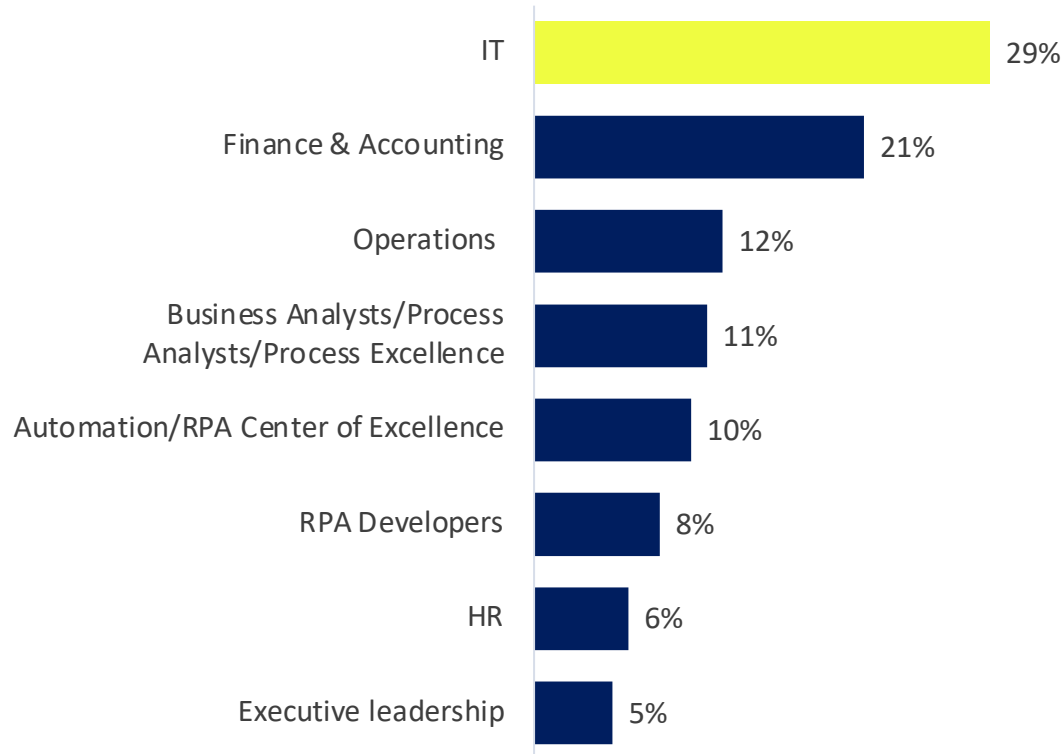
The reasons for these mirrored findings are logical. IT is the most likely to identify better solutions available in the market and trigger a move for change, citing the possible benefits such as better capabilities and less complexity to lessen the reliance and dependency automation places on IT resources.

Finance & Accounting is the most common sponsor not only because of their natural role in organizations as budget holders, but also because they are typically the most common adopters and high-volume users of automation in companies because of the number of processes they own and automation's practical application for them to increase efficiency and quality.
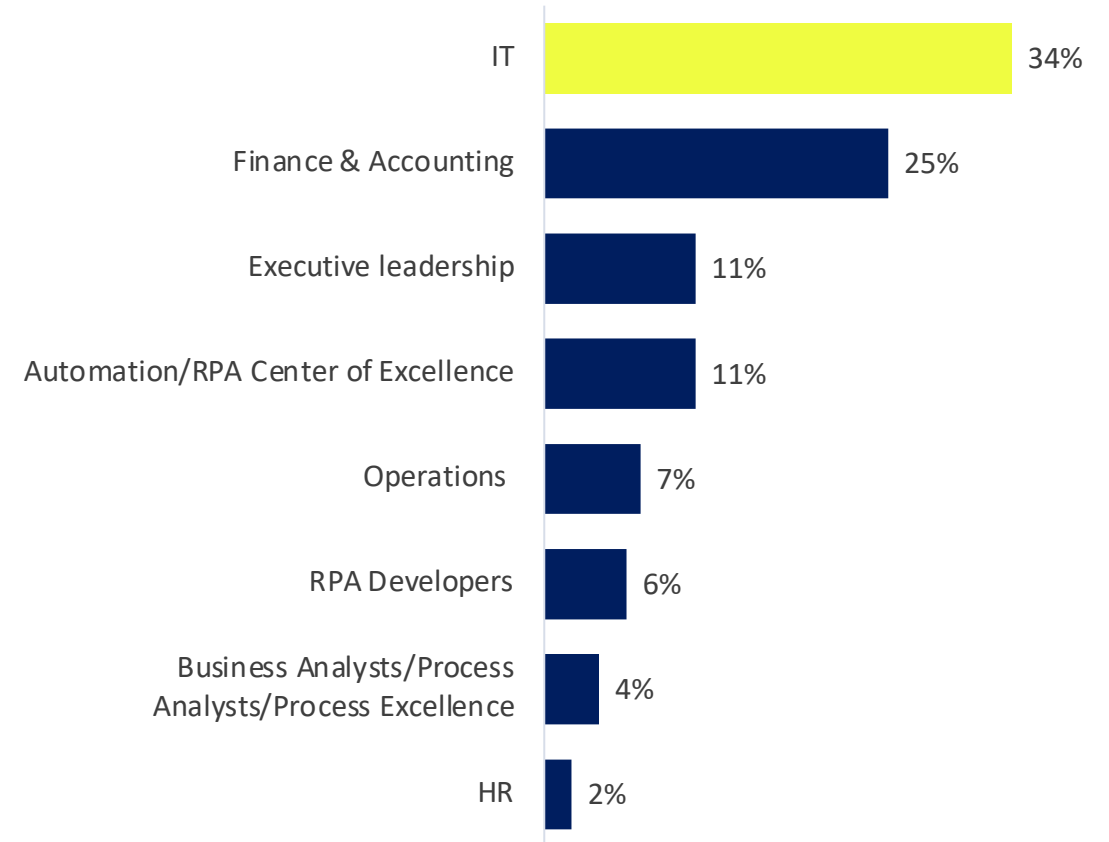
IT is the most common department driving the demand to switch and Finance & Accounting is the department sponsoring re-platforming.

blueprint

Process Modernization: Departments driving demand
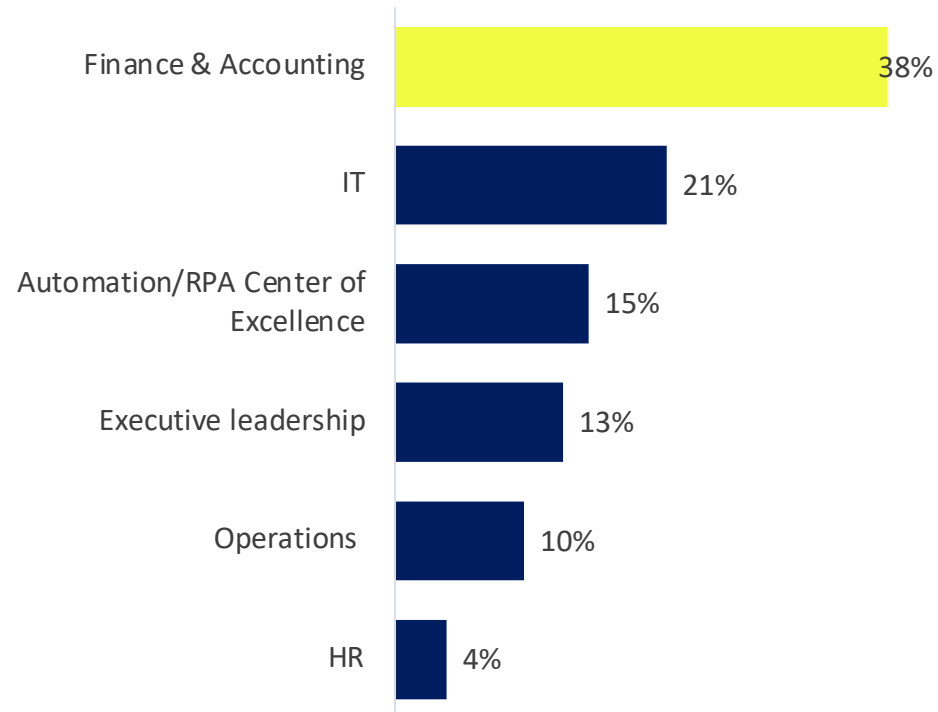
Organizations who have already switched RPA tools

Department	Percentage
IT	29%
Finance & Accounting	21%
Operations	12%
Business Analysts/Process Analysts/Process Excellence	11%
Automation/RPA Center of Excellence	10%
RPA Developers	8%
HR	6%
Executive leadership	5%

Organizations in the process of switching RPA tools

Department	Percentage
IT	34%
Finance & Accounting	25%
Executive leadership	11%
Automation/RPA Center of Excellence	11%
Operations	7%
RPA Developers	6%
Business Analysts/Process Analysts/Process Excellence	4%
HR	2%

blueprint

Process Modernization: Departments sponsoring re-platforming

Organizations who have already switched RPA tools

Department	%
Finance & Accounting	38%
IT	21%
Automation/RPA Center of Excellence	15%
Executive leadership	13%
Operations	10%
HR	4%

Organizations in the process of switching RPA tools

Department	%
Finance & Accounting	30%
IT	27%
Executive leadership	16%
Automation/Intelligent Automation/RPA	12%
Operations	7%
Innovation/Digital Transformation/Digital Operations	5%
HR	4%

blueprint
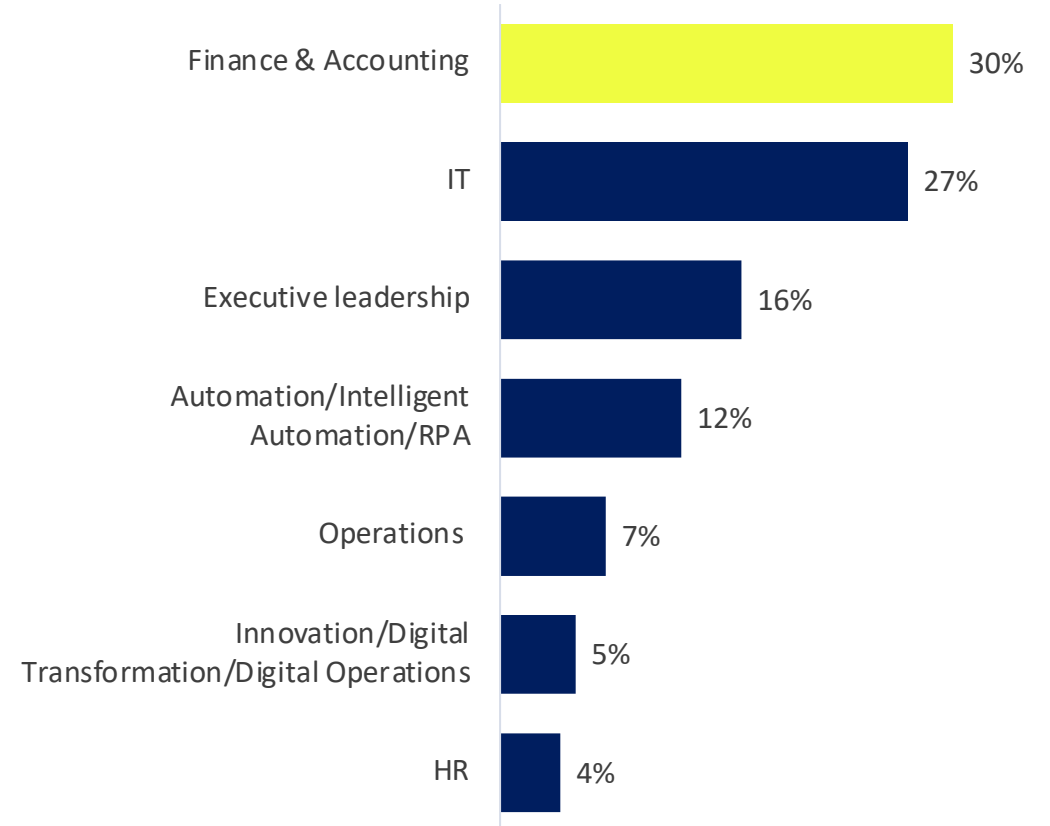
03

THE RPA TOOLS DRIVING RE-PLATFORMING

- The demand to re-platform
- Duration of original tool usage
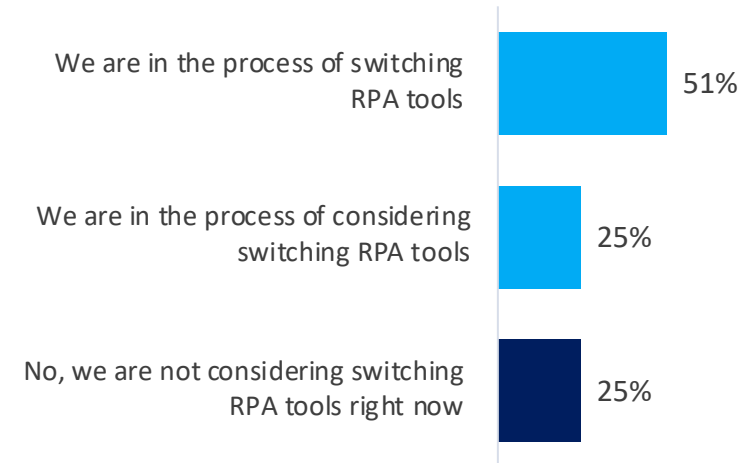- Which RPA tools are organizations are switching to

blueprint

Process Modernization: The Demand to Re-platform

Out of the organizations surveyed, 26% of them have already switched RPA platforms or had at least one business unit in their organization change RPA vendors at some point in the past.

Of the 74% that have always used the same, singular RPA platform – that's nearly ¾ of all respondents – a staggering 76% are in the process of re-platforming their automated processes to another tool or considering a switch, indicating that the desire to switch is very much present and dominant.

74% of all organizations surveyed still use their original RPA platform. Of those still on their original RPA tool, 74% are in the process of or considering switching.
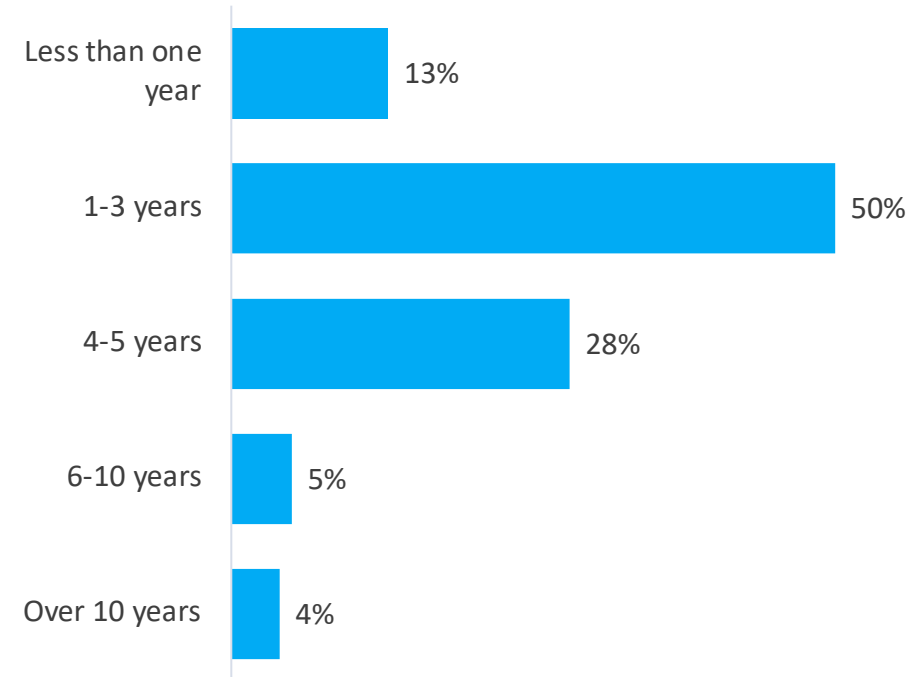
We are in the process of switching RPA tools	51%
We are in the process of considering switching RPA tools	25%
No, we are not considering switching RPA tools right now	25%

blueprint

Process Modernization: Duration of Original Tool Usage

The survey participants that have already switched RPA tools used their original platform for an average of 3 years.

This suggests not only that the RPA vendor market has been unlocked and is experiencing unprecedented movement, but also that if organizations are not realizing the returns or scale they expected, the decision to re-platform will be taken regardless of the challenges that may exist with switching.

How long did you use that original RPA tool?

Category	Percentage
Less than one year	13%
1-3 years	50%
4-5 years	28%
6-10 years	5%
Over 10 years	4%

blueprint®

Process Modernization: Which RPA Tools are Organizations Switching to

When looking at which RPA platforms organizations have already migrated away from, Automation Anywhere (29%) and Blue Prism (28%) are the most common tools companies have abandoned.

In terms of who's garnering attention from those considering re-platforming and redeploying their automations, 40% of respondents are most likely to choose Microsoft Power Automate (PAD) as their destination RPA vendor.

The reason Microsoft Power Automate is the destination of so many automation redeployments is simple: Microsoft offers excellent extensibility and compatibility because so many organizations use Microsoft products and services. Also, Power Automate has a very competitive and cost-effective price-point, and it's arguably simpler to use, promoting accessibility to a larger portion of any organization to increase scale and support a citizen developer approach to automation.

blueprint

Automation Anywhere (29%) and Blue Prism (28%) are the most common tools companies have abandoned

Process Modernization: Which RPA Tools are Organizations Switching to

Companies considering RPA platforms are most likely to choose Microsoft Power Automate (40%)
as a potential one to use

- Microsoft Power Automate
- Blue Prism
- Automation Anywhere
- UiPath
- Other

blueprint®
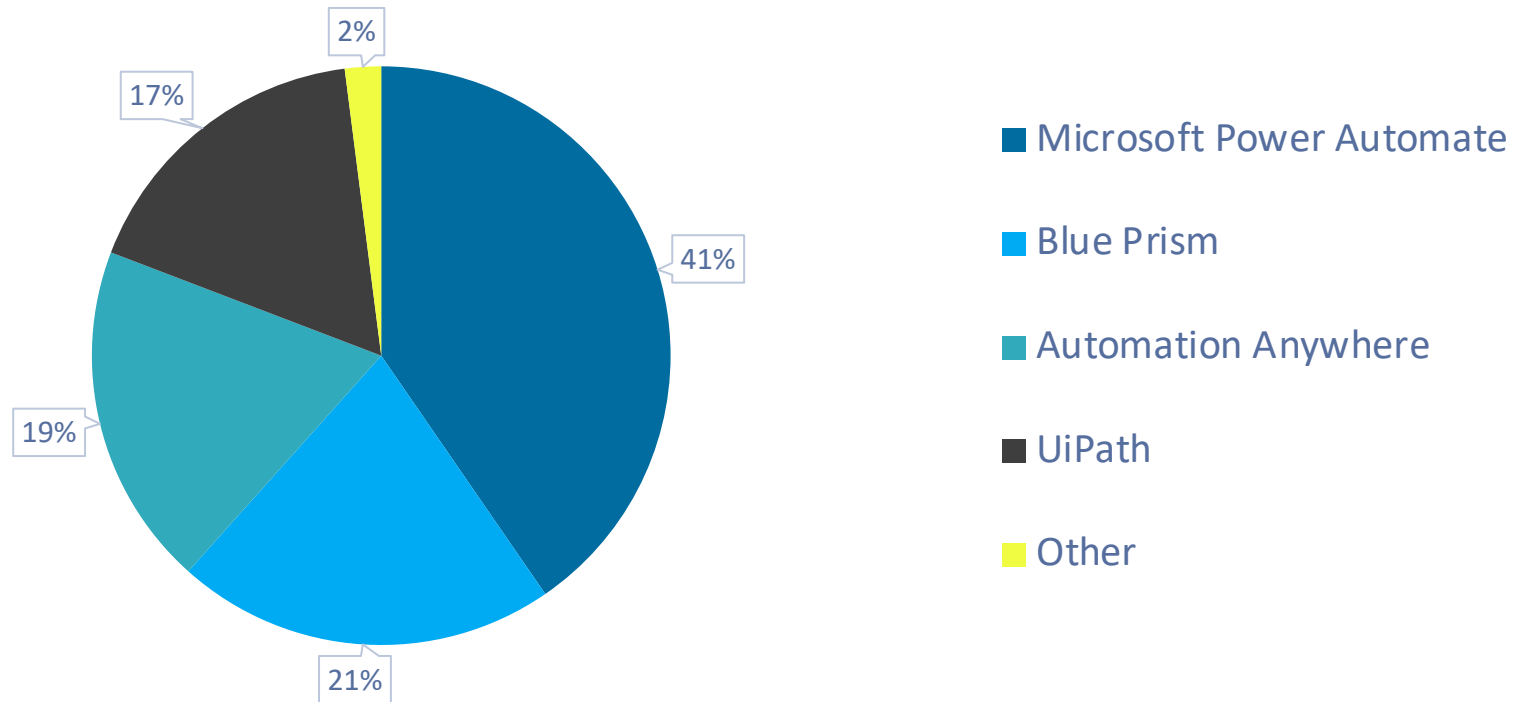
04

THE LOGISTICS OF RE-PLATFORMING AUTOMATION ESTATES

- Automations re-platformed
- Length of re-platforming projects
- Costs associated with re-platforming

blueprint
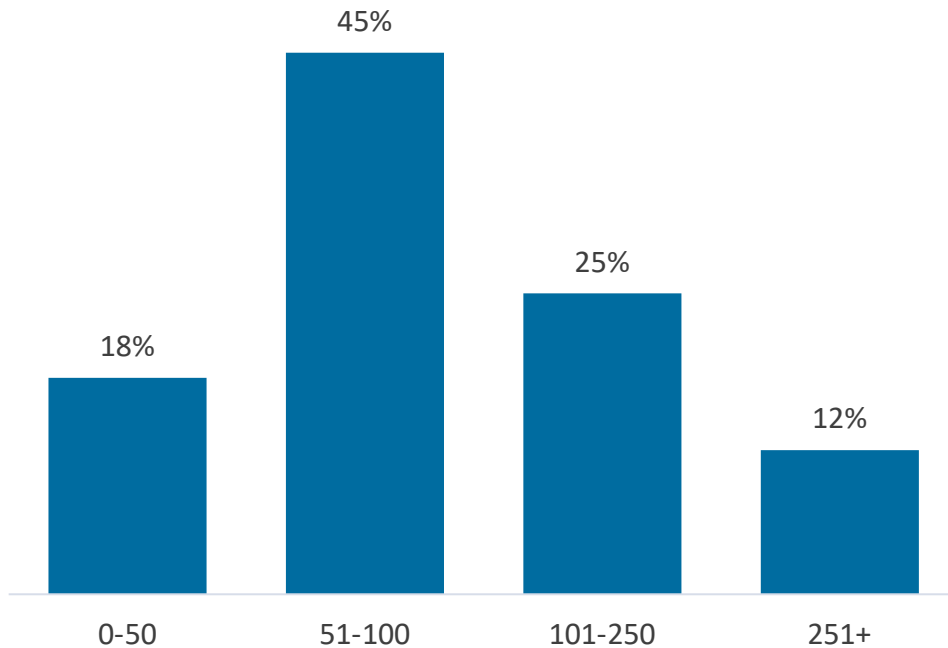
Process Modernization: Automations Re-platformed

Re-platforming entire automation estates is no easy feat, yet organizations that have already completed switches have redeployed an average of 120 automations into their destination RPA tools.

Similarly, of those currently in the process of re-platforming their automation portfolios to a new RPA vendor, they have been able to move an average of 117 automations, suggesting that even with the challenges associated with re-platforming, automation redeployments are and can be executed with mature automation portfolios successfully.
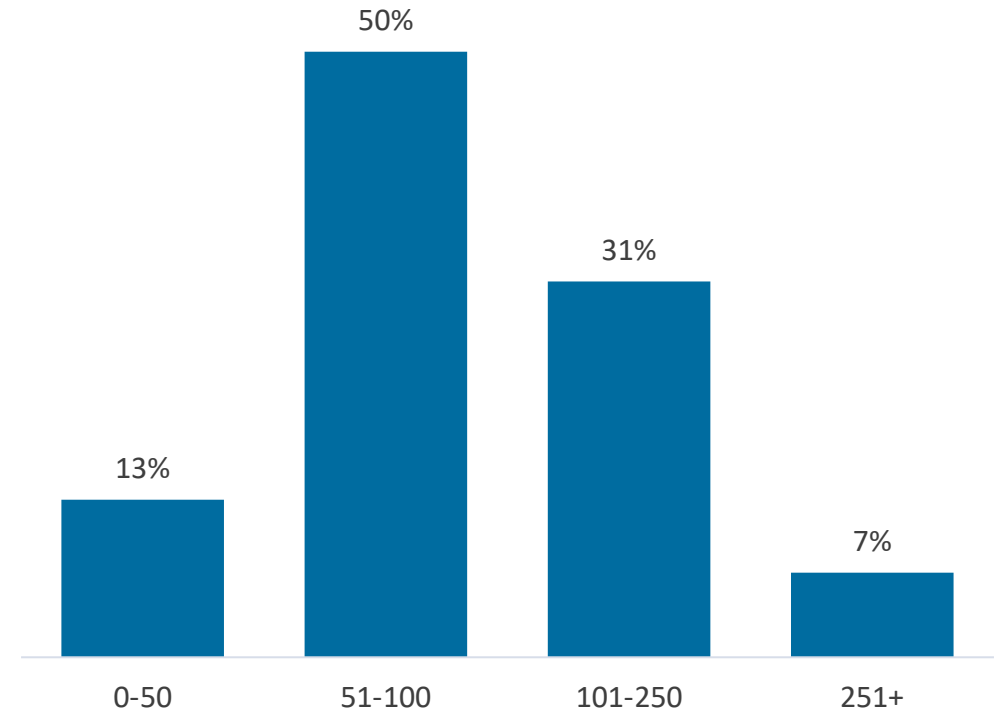
Among the companies who switched RPA tools, they each migrated 120 bots into their new RPA tool on average.

blueprint

Process Modernization: Automations Re-platformed

Organizations who have already switched RPA tools

0-50	51-100	101-250	251+
18%	45%	25%	12%

Organizations in the process of switching RPA tools

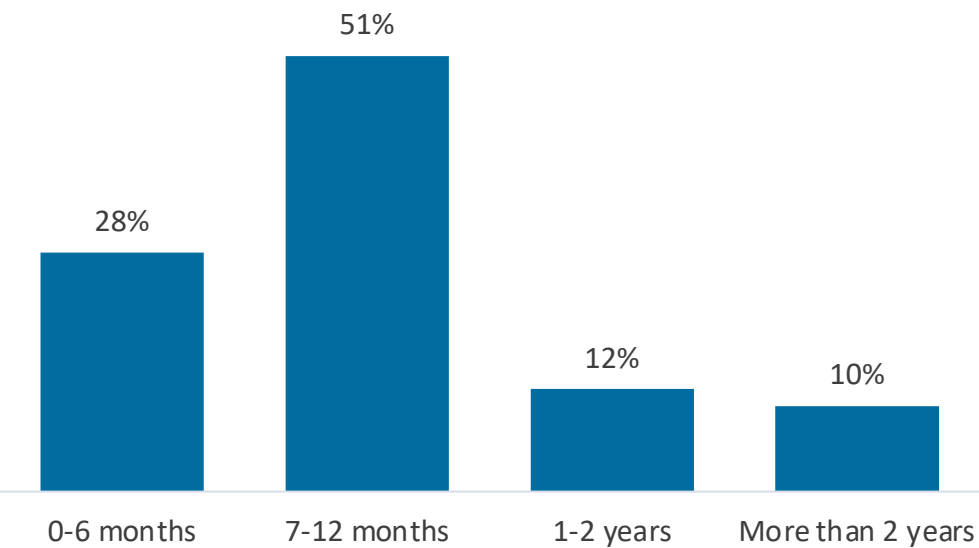| 0-50	51-100	101-250	251+
13%	50%	31%	7%

blueprint

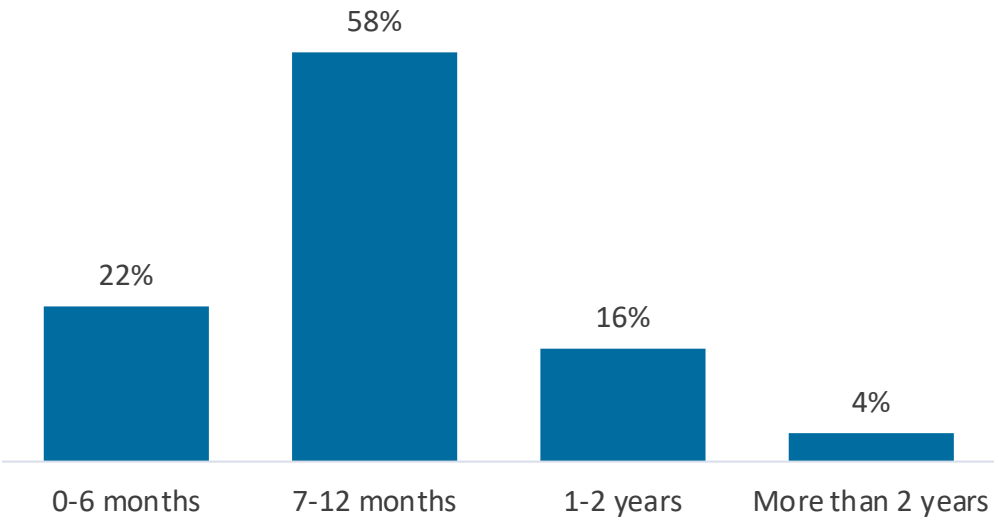# Process Modernization: Length of Re-platforming Projects

One of the biggest challenges with re-platforming automation estates to a new RPA tool is that traditionally, the only way to do so was manually which was very expensive and time-consuming.

On average, those who have already re-platformed their automations to another RPA vendor did so in 10 months. For those in the process of re-platforming, the majority believe it will take them 7-12 months to do so.

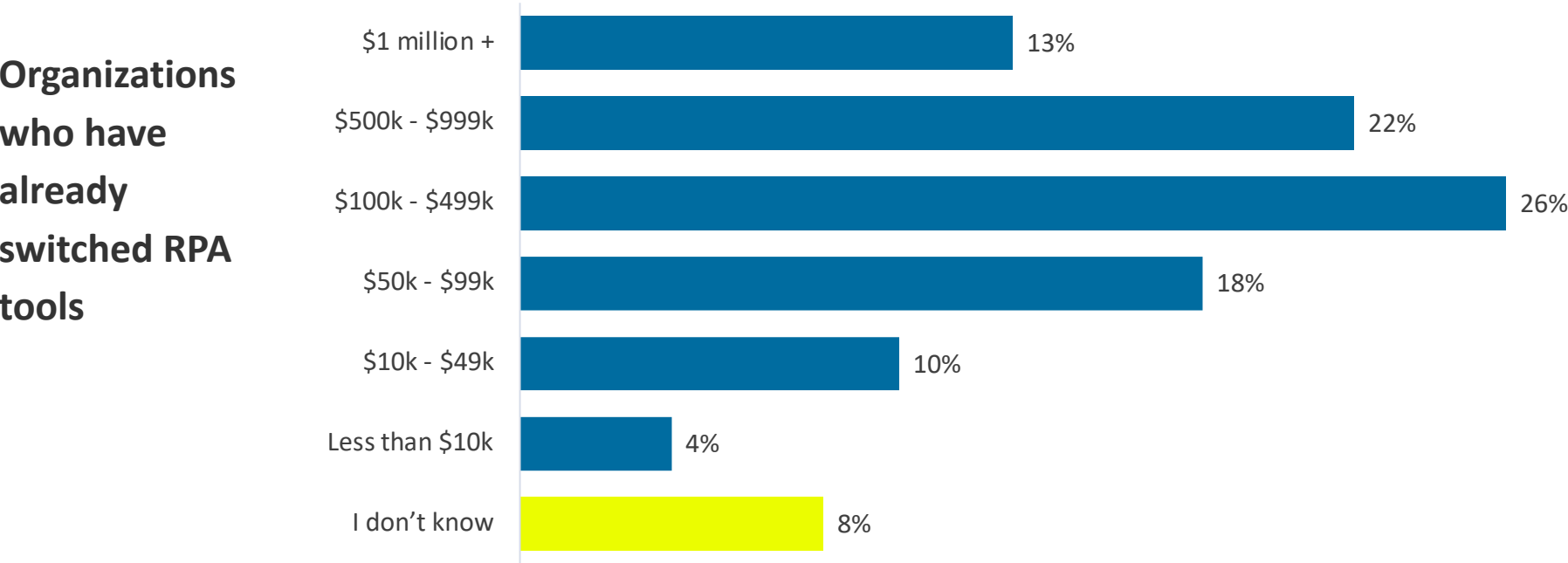**Organizations who have already switched RPA tools**

0-6 months	7-12 months	1-2 years	More than 2 years
28%	51%	12%	10%

Organizations in the process of switching RPA tools

0-6 months	7-12 months	1-2 years	More than 2 years
22%	58%	16%	4%

blueprint

Process Modernization: Cost of Re-platforming Projects

Because of the effort and time associated with re-platforming which is predominantly done manually, the costs are also naturally quite high, or at least they can be.

Organizations that have already switched RPA vendors paid an average of $500,000 to do so. Those in the process of switching expect to pay roughly the same.

Organizations who have already switched RPA tools

Category	Percentage
$1 million +	13%
$500k - $999k	22%
$100k - $499k	26%
$50k - $99k	18%
$10k - $49k	10%
Less than $10k	4%
I don't know	8%

blueprint

05

CHALLENGES OF RE-PLATFORMING

- Realized challenges
- Expected challenges
- Solutions used to re-platform

blueprint

Process Modernization: Realized Challenges

Re-platforming automation estates onto a new RPA tool without the right support can be a very challenging process.

When queried, those who had already redeployed their automation portfolios in a new RPA platform reported that the specialized resources they needed for re-platforming (45%) and the need to rebuild entire automations from scratch (44%) as the most significant challenges they encountered.

The validation of these challenges was not surprising. RPA platforms specify automations differently. For one automation to work in another tool, it must be rebuilt from scratch using highly-skilled resources that must first understand what the automation does, and then rebuild it, test, and deploy it for the destination platform which introduces a lot of bottlenecks and overhead.
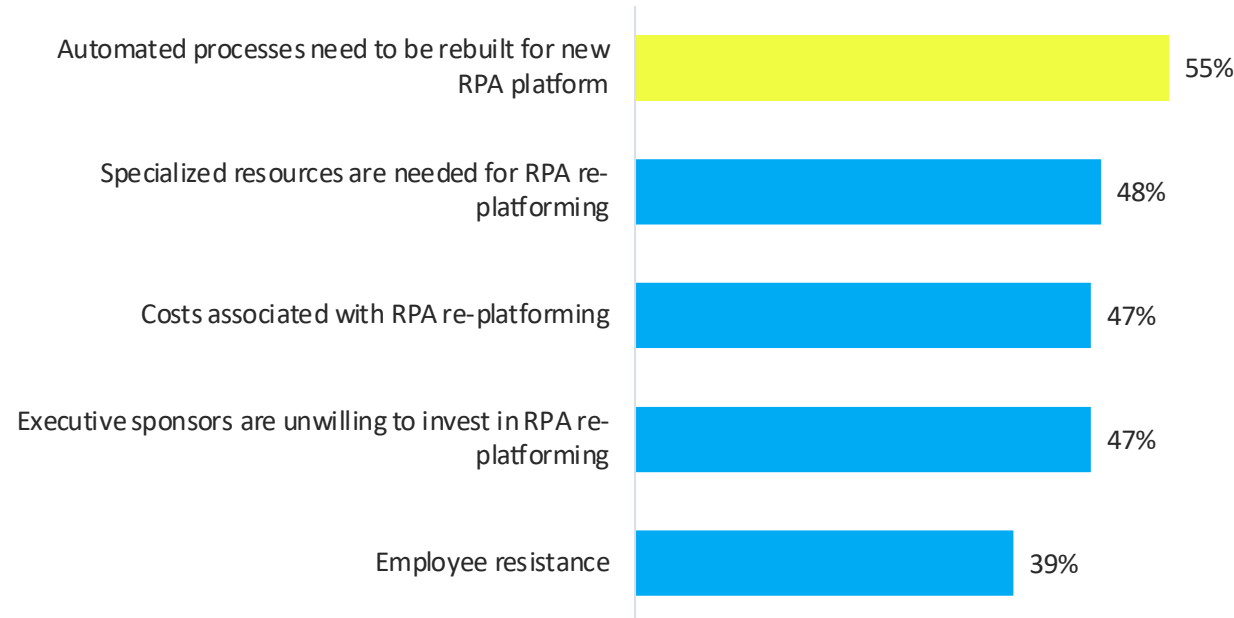
Specialized resources (45%) and the need to rebuild automations from scratch (44%) were the most significant challenges encountered for those who have already switched RPA tools.

blueprint

Process Modernization: Expected Challenges

Similarly, those in the process of re-platforming their automation estates expected the need to rebuild their automation portfolios as the biggest challenge they would face, suggesting that this perceived reality poses the biggest headache to organizations in the process of or considering a switch.

The need for specialized resources to redeploy automations is also a major concern; however, unlike those already having completed a switch to a new RPA tool, the threat of rising costs and securing executive sponsorship are also anticipated barriers.

Among companies considering to switch RPA tools, the most anticipated challenge concerns the need to rebuild automated processes for the new RPA platform (55%)

Automated processes need to be rebuilt for new RPA platform	55%
Specialized resources are needed for RPA re-platforming	48%
Costs associated with RPA re-platforming	47%
Executive sponsors are unwilling to invest in RPA re-platforming	47%
Employee resistance	39%

blueprint

Process Discovery: Solutions Used to Re-platform

There is a big discrepancy in *how* organizations re-platform, depending on where they are in their re-platforming journey.

Those that have already switched RPA vendors, by and large turned to third-party solutions to help them redeploy their automation estates (61%).
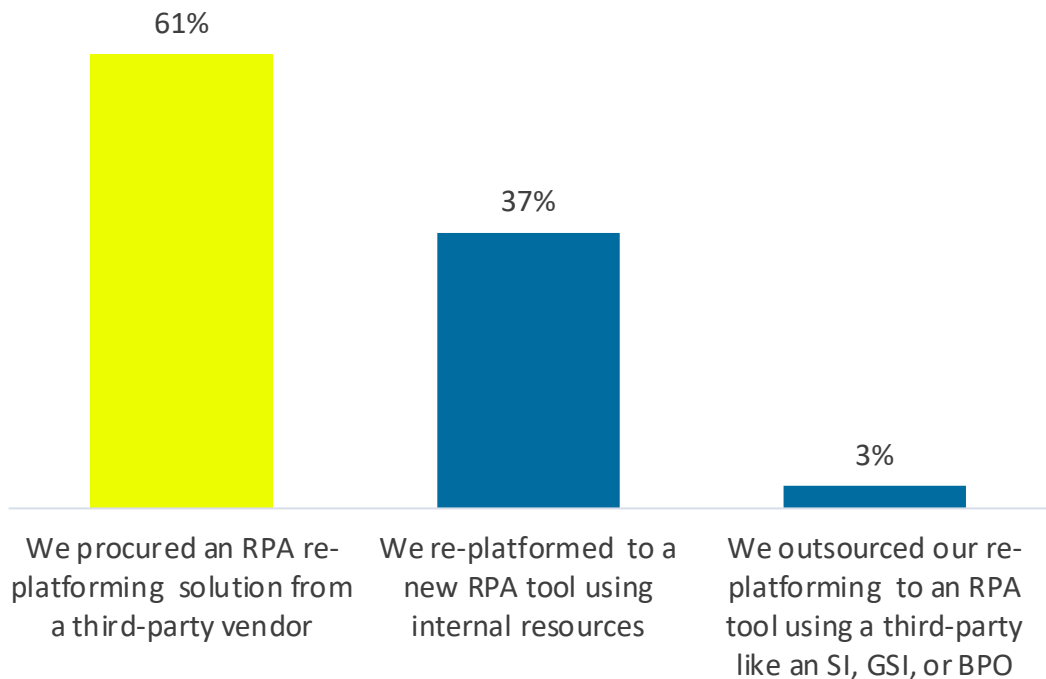
Those considering switching RPA tools reported that they would rely on internal resources to do so (63%).

This may suggest that the organizations currently considering re-platforming are unaware of the technical complexity, expertise, and skilled effort required to re-platform and believe their internal resources might be enough. Those that have made the switch, however, have quickly realized ample support is definitely needed.
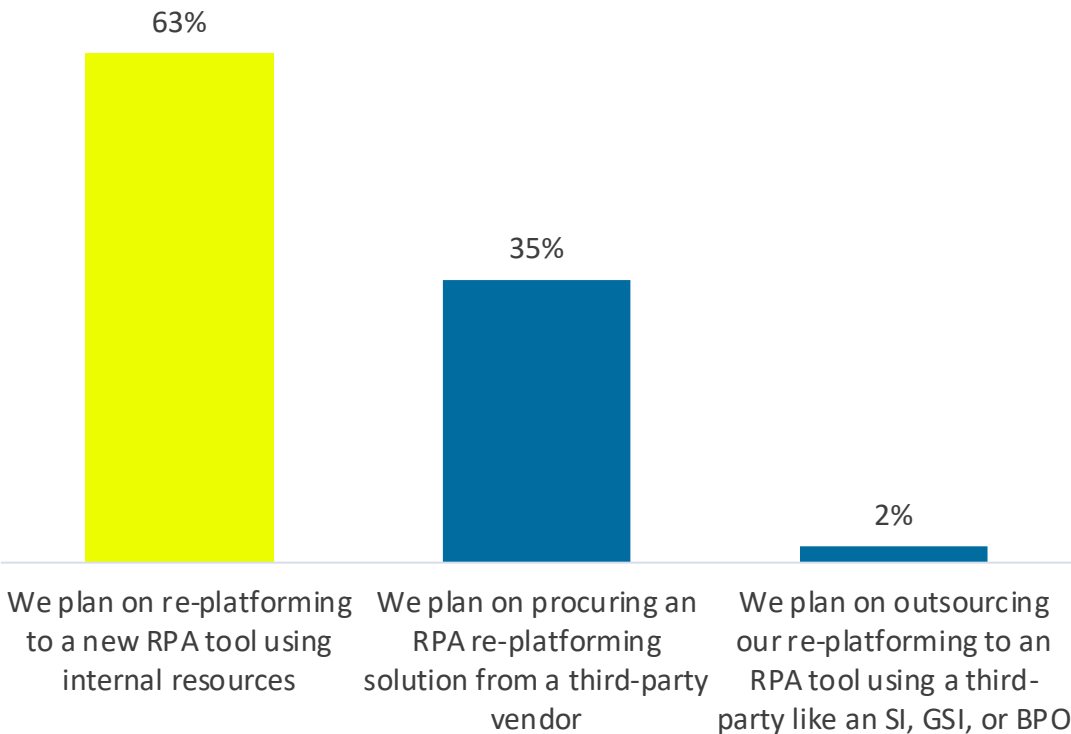
There is a big discrepancy in how organizations re-platform, depending on where they are in their re-platforming journey.

blueprint

Process Modernization: Solutions Used to Re-platform

Among those who have switched RPA tools, most companies are likely to procure a solution from a third-party vendor to do so (61%)

Among companies considering switching RPA tools, most plan on using internal resources to re-platform automated processes to a new RPA tool (63%)

Chart 1:
- 61% — We procured an RPA re-platforming solution from a third-party vendor
- 37% — We re-platformed to a new RPA tool using internal resources
- 3% — We outsourced our re-platforming to an RPA tool using a third-party like an SI, GSI, or BPO

Chart 2:
- 63% — We plan on re-platforming to a new RPA tool using internal resources
- 35% — We plan on procuring an RPA re-platforming solution from a third-party vendor
- 2% — We plan on outsourcing our re-platforming to an RPA tool using a third-party like an SI, GSI, or BPO

blueprint

06
CONCLUSION

blueprint

Process Modernization: Conclusion

There is a considerable amount of automation re-platforming across all industries as organizations look for better capabilities, features, extensibility, and more cost-effective automation platforms.

IT is the business unit driving the demand for re-platforming and Finance & Accounting—the department that predominantly sponsors the desire to switch automation vendors for benefits that include more innovative capabilities, accessibility for the average business user, and higher returns.

Even with the noted benefits, there are still considerable challenges to automation re-platforming; namely the need

to rebuild entire automation portfolios for the destination RPA tool which demands specialized resources and incurs higher costs and extended project timelines.

For that reason, organizations looking to or in the process of switching RPA tools are continually contracting the services of third-party solutions like Blueprint which accelerate automation re-platforming at a much more cost-effective price-point than relying on internal resources or other expensive options.

For more information on how Blueprint can help your organization re-platform your automation estate faster using fewer resources, visit www.blueprintsys.com/replatforming.

blueprint

SUMMARY

Respondent demographics summary

DEMOGRAPHICS

Country of residence

TOTAL RESPONDENTS: 410

🇬🇧	🇺🇸	🇩🇪	🇫🇷	🇨🇦
150	186	20	20	34

Audience

| ☑ Switching complete: 25%	⬦ Switching in progress: 56%	✕ Switching failed: 0%	🚫 Not switched or considering: 18%

Role type

- 28% of respondents held Owner / C-suite level positions
- 27% of respondents held Senior Manager / Head positions
- 22% of respondents held VP / Director positions
- 20% of respondents held Analyst / Manager positions
- 3% of respondents held Developer positions

Size of company

# of employees	1,000 – 4,999	5,000 – 9,999	10,000+
% of respondents	60%	18%	22%

Business Industry
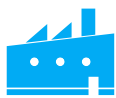
COMPANY SECTORS: TOP 3:	FINANCIAL SERVICES: 47%	BANKING: 21%	HEALTHCARE/PHARMA/LIFE SCIENCES: 13%

blueprint®

Summary & Overview

01

Finance & IT are key drivers behind RPA decisions

Finance & Accounting and IT departments are the most likely to hold budget responsibility over RPA and push towards switching RPA tools, respectively.

02

Expected benefits = Reality

Among those who have switched tools, the biggest reason given for switching RPA tools was to leverage better capabilities and features.

Equally, the biggest realized benefit from switching tools was receiving better capabilities and features, where the US in particular were beneficiaries.

03

Common challenges need addressing

The need for specialised resources and rebuilding automated processes are challenges common to those who have switched RPA tools and those considering.

Smaller companies are more receptive to the challenge of specialized resources, while owners and C-suite executives are more concerned with rebuilding automated processes.

04

Divergence in tool migration mediums

Among those who have already switched tools, the majority used a third party vendor to do so.

However, those planning to switch are instead considering using internal resources, particularly companies with less employees.

05

Costs of re-platforming

Because of the effort and time associated with re-platforming which is predominantly done manually, the costs are also naturally quite high, or at least they can be.

Organizations that have already switched RPA vendors paid an average of $500,000 to do so. Those in the process of switching expect to pay roughly the same.

blueprint

blueprint ®

Blueprint Software Systems is a global software company that helps enterprise organizations understand and improve how their business operates. Blueprint enables consolidated visibility and analysis across all processes within an organization, and provides the critical insights needed to identify improvement opportunities and then execute them with speed and precision. This enables more strategic decision-making, and dramatically reduces the time, cost, and effort associated with process analysis and optimization.

For more information, visit www.blueprintsys.com