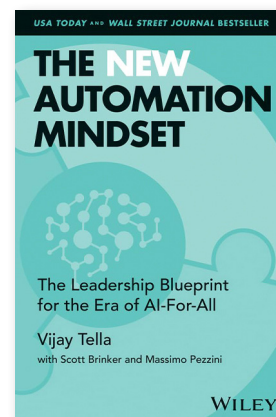


The New Automation Mindset

The Leadership Blueprint for the Era of AI-For-All

by **Vijay Tella, Scott Brinker, and Massimo Pezzini**



Contents

The New Automation Mindset

Page 2

Architectural Underpinnings

Page 2

Plasticity and Democratization

Page 3

A Practitioners Guide to World Class Automation

Page 4

The Customer Experience

Page 4

The Enterprise AI Platform

Page 5

The Future of the Enterprise

Page 6

THE SUMMARY IN BRIEF

We find ourselves at a critical juncture in technology and the future of work. The barriers between ideators and automators have been eliminated. One of the most promising developments of this digital age is that any organization can unlock an astonishing level of continuous innovation and automation within organizations. With the right mindset, we do not need the same level of extraordinary resources of prior generations of leaders. With the emergence of generative AI and low-code automation technologies, any business can now achieve the speed and scale to transform and thrive.

But gains in productivity don't happen just because the technology exists. People have to figure out how best to reorganize their work around it. In *The New Automation Mindset: The Leadership Blueprint for the Era of AI-For-All*, authors Vijay Tella, Scott Brinker, and Massimo Pezzini provide CEOs, CIOs, and other business and technology leaders a blueprint to embrace a new way of working, one that focuses on the big picture, thrives on change, and engages everyone. This new way of working results from adopting the new automation mindset.

IN THIS SUMMARY, YOU WILL LEARN:

- The new automation mindset needed to thrive in disruption.
- How to underpin automation with intentional architecture.
- The practitioners guide to world class automation.
- How an enterprise AI platform makes it all happen.

Part 1: The New Automation Mindset

The New Era of Automation

The word “automation” covers a lot of ground. For some, it’s a way to replace manual work with bots. For others, it sparks worry. It’s important to think about automation in a new way so we don’t miss out on its benefits. In the future, companies with the right mindset about automation will thrive in the face of challenges rather than succumb to them. This mindset will determine whether they tap into exciting opportunities such as generative AI (GenAI) or are disrupted by them. In other words, how we think about automation and AI will decide if we succeed or fail.

Companies with the right mindset apply the advances in automation and generative AI to become unstoppable. They look at the big picture, with an ethos that embraces challenges and an approach that is inclusive of all of the talent in their companies. Economic challenges, system shocks, and even potential black swan events only make these companies stronger. They are antifragile. Automation and AI are central to this new way of thinking called the new automation mindset.

To become antifragile, to achieve transformative change at the scale that is required, you need to have process, growth, and scale mindsets working in unison in your company. When that happens, the new automation mindset falls into place and our organizations can become unstoppable.

The Process Mindset

We buy apps to solve problems and add capabilities. They complete tasks or make groups of tasks easier. But the tasks are not isolated; assembled together they make up processes, which make up businesses. To understand how the tasks fit into the big picture, we need to apply systems thinking.

Companies need a cohesive, unified foundation of data, workflows, and user experiences to be able to begin to drive successful transformation across their business. The real value in automation is connecting all our apps and weaving together our existing investments. To solve the ever growing problem of fragmentation across our processes, we need something that enables a holistic cross-functional view of the different processes that support our organization.

The Growth Mindset

Companies who choose to embrace change have a growth mindset. The growth mindset is not only about our ability to react to major events such as the pandemic, market down-

turns, or global supply chain issues. It’s also about our response to everyday challenges that persist in our companies. Our businesses need to be equally as effective at responding to both daily challenges and company-threatening crises.

We are operating in an environment of rapid and continuous change. Technology, competitive dynamics, and—most of all—customer behaviors and expectations are continually shifting around us. Whether those changes are a threat or an opportunity largely comes down to adaptability. We want new processes to be predictable, but the key is that it be adopted to new circumstances. And here’s the beautiful thing: because almost all of our processes today are—or can be—digital or digitally orchestrated, they are extremely malleable.

The Scale Mindset

There is a scale problem with the traditional approach to automation. In the past, companies tried to scale by adding more. But continually increasing headcount is not a realistic or cost-effective choice. The sheer number of processes means there will never be enough IT specialists to keep up with demand.

Business teams are creative, thoughtful, and eager to solve problems. They are well versed in data, applications, and business logic that underlie core processes in their domain and they collectively know the vision and mission of the organization. When business teams are not empowered to solve their problems, it’s a lost opportunity for automation.

The scale mindset means embracing a new operating model that taps into the latent potential of the company. A scale mindset does not disempower the IT team. It raises its profile within the organization. Business teams need to be empowered by training, consulting, mentoring, support services, and the right combination of technologies. The IT team is ideal for this.

Rethinking technical expertise is not designed to replace them but elevate them as a steward of company potential. Adopting the scale mindset will do more than expand a company’s technical capacity—it can focus it.

Part 2: Architectural Underpinnings

Orchestration

Orchestration coordinates people, software, and data in end-to-end processes to get jobs done. With orchestration, people—customers, employees, or partners—are still key components of the process where their strengths are needed most.

We want our companies to do better than survive tough times; we want them to thrive.

Orchestration allows our people and technology to maximize their respective strengths. Tech, especially AI, is able to interpret large sets of data across the entire process and even build a template for the ideal end-to-end orchestration, but people are best at creative tasks or nonstandard exception handling. Orchestration holds technology, human expertise, and automation in balance, maximizing outcomes for the company. It asks how to get the job done best with every resource available.

People, process, and data are orchestration's most basic building blocks. End-to-end processes always involve all three. These ingredients are intertwined and linked to one another. By orchestrating it, businesses establish sustainable advantages with processes that are frictionless and efficient.

Plasticity

We want our companies to do better than survive tough times; we want them to thrive. Thus, we need to build antifragile systems that thrive under stress. Our brains are antifragile. When challenged and trained, they tear down and rewire neural processes.

Like brains, our companies should grow and rewire in response to challenges. Unfortunately, that's not typical. Processes are rigid and in this climate, a rigid company is a dying one. Our brains use plasticity to thrive in challenges and our companies need plasticity too.

Company processes infused with plasticity allow businesses to:

- Thrive despite external pressure from the economy or competition
- Quickly refocus during times of internal organizational turmoil
- Continuously improve to identify new and unique ways of meeting objectives
- Enter new markets, maximize efficiency, create amazing customer experiences, develop innovative products and services

Plasticity needs an automation architecture. It must operate

in lockstep with the operating model, and this requires the right strategy.

The three key components organizations must include in their automation strategy are:

1. Composable capabilities: allowing teams to turn automations into the building blocks of the organization;
2. AI-assisted orchestration: the ability to rapidly connect building blocks to achieve end-to-end outcomes either manually or through assisted AI;
3. Flexible experiences: enabling people to interact and participate in workflows without requiring long development cycles.

It is recommended that companies integrate these components first to eliminate rigidity.

Democratization

Competing interest exists in every organization—governance is how we manage them. Those responsible for maintaining the company's tech protect the company from risk. Line of business workers are trying to make their jobs faster, easier, or to achieve higher quality outputs. These two objectives aren't always aligned. As leaders, our mandate is to embrace these as complementary strengths and build an operating model that supports both sides.

Success lies in the balance of democratization and governance. Democratizing automation allows people to automate workflows using their ideas of what is best for the company. Sometimes those ideas come from the business and other times from IT.

A collaborative approach builds trust between the two teams and a healthy respect for the challenges that each team faces daily. While this may seem fluffy, it is critical, as without trust, many projects get bogged down in finger-pointing and disagreements. By putting IT and the business on the same team, they begin working together rather than against each other.

In this vision for democratization, IT needs to step into a more strategic leadership role. IT must enable people across the business to automate. Training, consulting, mentoring, and support are all needed. That includes providing the technology and means to do the work, but it also means establishing, communicating, and enforcing rules that protect the company.

Part 3: A Practitioner's Guide to World Class Automation

Mastering Your Automation Journey

What we've learned so far gives us a vantage point that rises above our immediate goals and projects to see the outcomes that need to be delivered across the company. With that view, we can align our automation work on the business outcomes that make a company thrive.

Our new automation mindset makes us recognize the core outcomes that automation can:

- Drive revenue growth
- Increase customer retention and expansion
- Help retain employees and empower them to be productive
- Improve supplier relations and efficiency
- Encourage operational excellence

These outcomes are foundational to any business. They should be foundational to any automation strategy, too.

Processes usually have a primary focus on one of these top level goals. These core objectives are called towers of automation. When setting out to execute an automation strategy, leaders should organize their approach around these five towers, which drive associated core objectives.

The Back Office

Back office functions of IT and finance are crucial for a company with the new automation mindset. Many companies have worked hard to make back office functions more efficient, but there is still a lot of room for improvement with automation, including faster end-to-end processing, greater agility, and improved experiences.

While some people downplay the importance of back-office functions due to them not being direct revenue-generating services, they are in fact the foundation of every company.

Automating these foundational processes can have a direct impact on all aspects of customer experience, employee experience, and front-office operations and helps ensure the rest of the business does not grind to a halt.

All of this results in real competitive differentiation for the business. It's for this reason that many companies start with back office functions when embarking on their automation journey.

The Front Office

The front-office tower of automation includes parts of the company that are customer-facing or revenue-driving, with sales and marketing being the largest functions. These areas are all jackpots of automation opportunities.

Automation goals for the front-office are, in short, the same as the business goals. Fundamentally we want to increase revenue.

This is achieved by helping sales teams to sell more products or services, marketing to increase awareness, and customer support or delivery teams to retain and upsell more customers.

But the outcomes do not stop there. A well-automated front office results in enhanced customer experiences, elevated employee experience, and improves the bottom and top lines by creating wow moments for the customers.

The Employee Experience

The employee experience tower includes everything that involves how an employee engages with their employer. It starts from recruitment and goes through onboarding, learning and development, all the way to off-boarding when it comes time to leave. There is an enormous amount of potential to delight our people and drive more productivity with automation.

It is necessary to build seamless processes to support the entire employee journey and create the moments that matter. Not only will we have happy employees, but we'll find efficiencies along the way.

Automation to improve employee experience has three components: culture, technology, and processes. If we want to create delightful employee experiences, all three have to come together.

The Customer Experience

The customer experience leaves a lasting impression and is the difference between whether people become promoters

We need a robust, cohesive, and strategic approach to delivering on the promise of automation.

or detractors of our brands. Thus, creating and obsessing over a great customer experience is a smart approach.

Because so many customer interactions happen in the digital space, customer expectations have shifted to match. This means that customers want their experiences to be faster, self-service, app driven, and more. On the other hand, they don't want the impersonal or restrictive experiences that are over automated and impersonal.

The customer experience tower of automation is made up of the key touch points between organizations and their customers. This includes customer service functions, managing customer data, marketing, and commerce.

As with all towers of automation, this represents a subset of customer related functions but is a great starting point for thinking through your CX automations.

Supplier Operations

Nearly every company has to work with suppliers. Companies may be sourcing raw materials for manufacturing, leveraging external service providers, or relying on partners to support other parts of their business. The interactions between a company and its suppliers and partners are ripe opportunities for automation.

Every supply chain has two flows—goods and materials flow in one direction and data, and information flow back in the other direction. As goods are sent from the sender to the receiver, information from each step along the journey is relayed back to the sender.

Typical processes that are part of the supplier operations tower include order to cash, procure to pay, source to contract, plan to product, and more. All these challenges and all these processes have opportunities to apply automation to significantly streamline operations.

Part 4: Making it Happen

The Enterprise AI Platform

Generative AI has changed the way we see our tasks, jobs,

and organizations. More than text, code, or images, what generative AI can give you is the ability to add substance to ideas. Looking at this from an enterprise lens, AI can rethink existing processes completely. But how? Generative AI is versatile and expressive but the output is raw and varies based on the input.

To harness generative AI at scale, companies need an enterprise AI platform with a set of core technical specifications and capabilities.

- **Explainability:** The ability to generate solutions that can be accurately interpreted by any human.
- **Utility-like:** Users should just be able to “plug or run” these solutions.
- **Observability:** The necessary means for nontechnical personas to monitor and troubleshoot any issues that may arise.
- **Adaptability:** The ability to train and enhance its model based on issues discovered as part of the execution of AI-generated solutions.

The Automation Ecosystem

The number of potential automation solutions is large. Most companies use many specialized tools but still struggle to get the value they were promised. The approach is broken and unsustainable and the cost and effort of most automation tools is intense. To succeed in this new era we have to apply them in the right way.

We need a robust, cohesive, and strategic approach to delivering on the promise of automation. This strategic approach to automation requires the ability to democratize and enable broader teams to automate.

It needs to act as the glue to bring our apps, people, and specialized automation tools together. It needs to orchestrate end-to-end processes while remaining easy to change such that we maintain our plasticity.

This may seem like a tall order, but the reality is that this is all entirely possible today. This is something companies are already moving forward with, called enterprise automation.

Enterprise Automation

Different technologies cover different capabilities. But some of these technologies offer more *technical* value than *business* value. The new automation mindset calls for a broader view of the problem: one that aligns with the business outcomes we want, rather than the technology. This comes down to focusing on the thing we are looking to streamline: the business process.

Every business process is made of human interactions and system actions. Automated processes need to work within the dynamic environments of the business. This means human tasks and system actions need to interact with:

- Communication channels and collaboration tools
- Apps
- Data stored at all locations
- Partners and suppliers

There are three pillars of integration capabilities that we need to support to fully automate business processes.

- **Experience:** Capabilities related to integrating with employees, customers, and other core stakeholders.
- **Data:** Capabilities for integrating data across multiple systems for data consistency, system updates, and monitoring for business events in the data.
- **Process:** Capabilities enabling us to tie these human and system actions together into an end-to-end flow with exception paths and leveraging event-driven actions.

To support these integration requirements at scale, we need to allow for multiple architectural styles. Good architecture enables teams to build solutions that are easy to operate, test, and scale. It also enables them to share reusable assets to cut back on reinventing the wheel.

The New Operating Model

Applying automation to all corners of business is a big deal and will almost certainly change the way employees do their jobs. A well-planned approach is critical.

Large-scale organizational change requires a mix of the right incentives with the right social pressure to move the company in the right direction. With automation, we want to put the right operating model in place and fuel it with a culture of automation. This kind of change impacts many people across the company, and they need to be on board with the change.

The key people you need to consider when looking to implement an automation strategy can be grouped into three categories:

1. **Leadership:** The widespread use of automation requires buy-in and support from the top levels of the company.
2. **Automation builders:** Those who build and maintain the automations for the company will need to learn new skills and take on new challenges.
3. **Automation recipients:** When automating any business process there is a wide range of employees and contractors whose jobs may change as a result of that automation.

Each of these groups has very specific incentives and understanding them will help show each group how they will be better off. Develop key messages that resonate with these teams and as these key messages take root, you will begin to see a movement in the company.

The Future of the Enterprise

The new automation mindset is a new way to think about technology and a different way to think about business. But at the heart, it is a path to building unstoppable companies that are adaptable and resilient despite challenges.

The changing landscape of software, with the low-code and no-code revolution underway, means that the chance to build unstoppable companies is more accessible than ever. The new automation mindset is no longer only reserved for companies that can afford armies of engineers. It is available to any company, from the car dealership down the street to a 100-year-old Fortune 500 behemoth.

It is tempting to think about the new automation mindset as an end goal. If we reach the magical peak of the mountain, we think our journey is complete. It's not true.

Plasticity and the growth mindset mean we take on new challenges and reinvent ourselves. It is a call to always be improving, and always be looking for ways to be more nimble...to work harder than ever to build a different kind of company, an unstoppable company that hopes to thrive in the decades to come.

Unstoppable companies will be able to respond to existential threats not by hiding in a hardened bunker but by embracing the threats and using them to become stronger. The potential outcomes are so exciting, and the possibilities are

endless. But to get there, we have to change our mindset.

The New Career Paths

Fear of change is part of human nature. Today, many are concerned that robots, AI, and automation will make us all redundant. Some politicians and journalists are building careers on this age-old fear. The fear expands beyond tech, but even within tech with the rapid advances of generative AI, people start to wonder. When technology promises to change the way we work, we naturally react:

- What will this do to jobs?
- How will career paths change?
- What kind of new roles will grow in value?
- What can people do to stay ahead?

Change is constant, but some innovations have an outsized impact on society. The good news is that we have seen this before. History is on our side, as technology has created more opportunity every time.

While bots that mimic human work and generative AI models have been grabbing the headlines, an exciting career revolution has been playing out quietly in the background. Low code and no code automation platforms are fueling a new creative explosion in companies.

Business leaders are seeing the opportunities being created and roles focused on low code and no code technology are appearing in thousands of companies. Many of them have the word “operations” in their titles.

IT is tasked with supporting and enabling these operators with more accessible technology. The growing capability

of operators will continue to fuel demand for these types of jobs. Everyone has a new chance to position their careers for this change.

There is an exciting future ahead for us in automation. New opportunities, ideas, challenges, and efficiencies are just waiting to be discovered. All it takes is someone motivated and able to step up and build something that changes the trajectory of their company—and their career—forever.

The decisions of even one business leader can have real implications on how history unfolds. If we stick with the old automation mindset, we are setting up our companies for failure. Taking up the new automation mindset is the right path for every company.

Not only will it lead to dramatic business outcomes, it will also empower individuals to accelerate their own careers—ultimately leading to happier people and a healthier society. The technology is there. All we need to do is step up to our roles as catalysts—and the rest will follow.



Vijay Tella is founder and CEO of the automation platform Workato. Workato was recently named to the Forbes Cloud 100, the Deloitte Fast 500, and the CNBC Disruptor 50. The company is the culmination of his pioneering work in both the enterprise automation and consumer-facing software spaces. This includes being the founding VP of Engineering at TIBCO, the Chief Strategy Officer of Oracle Fusion Middleware, and the CEO of real time video company, Qik, now part of Skype.

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