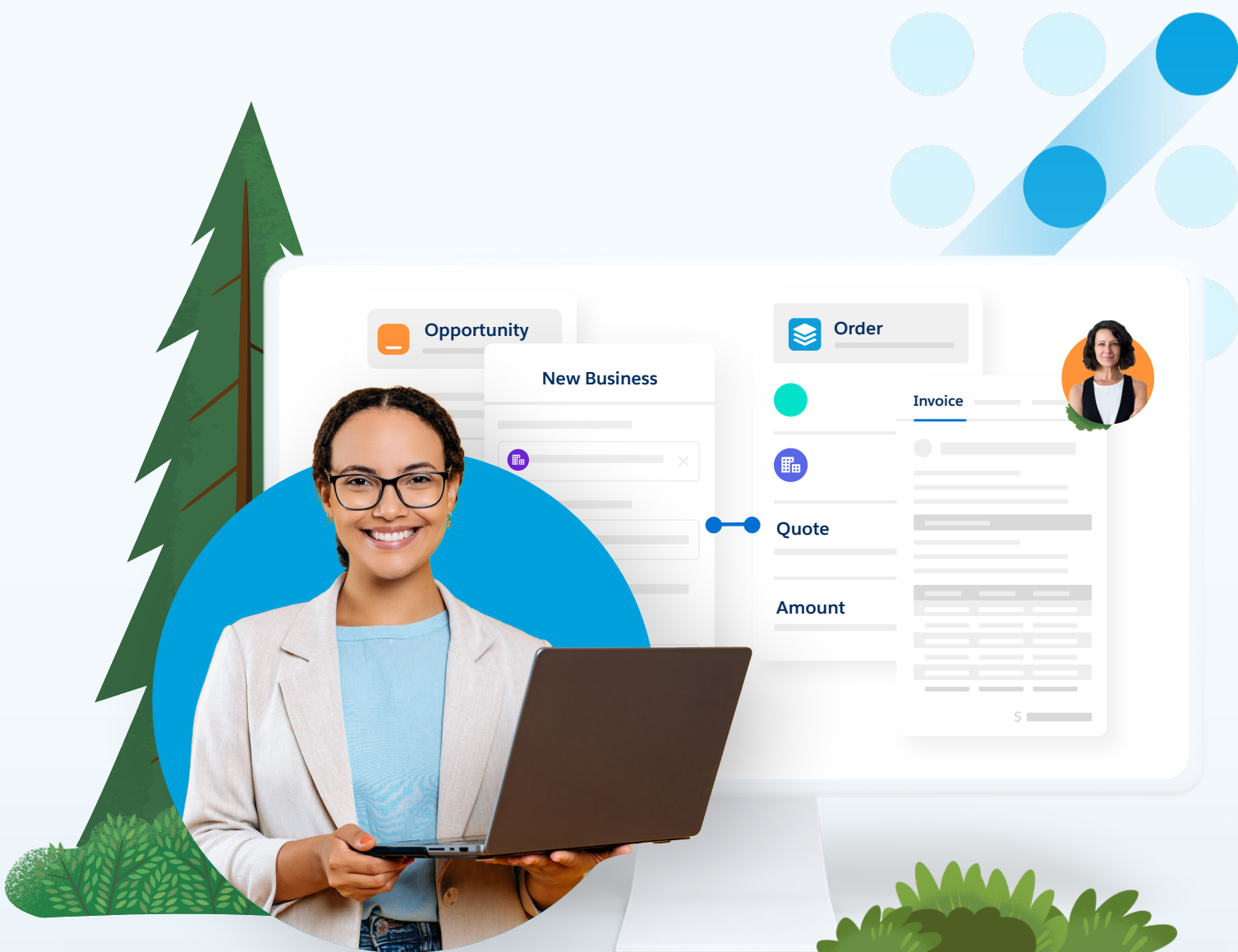


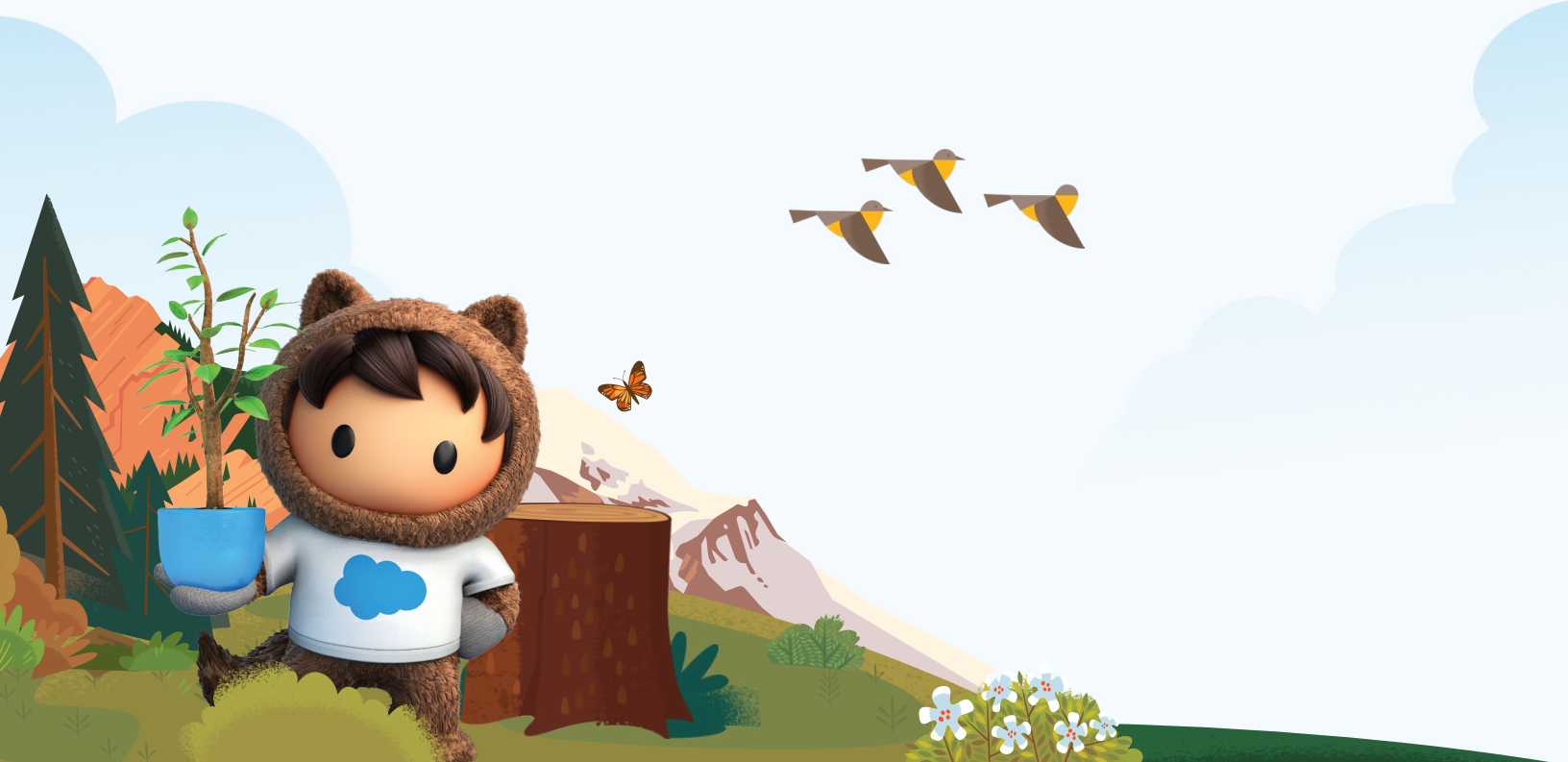
CIO Guide to Automation

Enable productivity across the enterprise



Contents

Introduction	03
What do we mean by automation?	04
1 Automation has been harder than it needs to be Top three challenges to automation	05
2 Begin building your automation strategy Getting started Sourcing and prioritizing automations	06
3 Taking the modern approach to business process management Domain ownership Adopting a product mindset Future-proofing your organization	10
What's next?	14



Introduction

Organizations succeeding in the digital economy have something in common – their IT and business strategy are becoming one in the same. In other words, every IT initiative is tied to a business initiative. This means that IT leaders are facing a daunting task: drive tangible increases in business growth, productivity and revenue, while saving costs.

However, IT teams are more bandwidth-strapped than ever due to increased project requests. There has been a [39% increase](#) in the number of projects from 2023, resulting in many IT teams spending time triaging project requests and catching up on their backlog rather than focusing on cost savings or revenue growth.

Automation, now paired with AI, introduces unique opportunities here. If done correctly, IT leaders can seize this challenging moment to do more, with more – more operational productivity, more automation, more simplification, and more flexibility. But just implementing automation alone won't solve for this, in fact, the majority (80%) of IT teams will have automation on their roadmap by the end of the year. The more interesting question becomes: which automation solutions are going to help me solve my business problems, and how should I implement them in a way that will scale with my business?



What do we mean by automation?

Organizations have been digitally automating for decades. And today, It's easier than ever to create automations for your business. And that's incredibly helpful for IT teams, as [75% of companies](#) report their teams across the business are demanding automation solutions, with IT teams managing [two-thirds](#) of those automations. With such a clear demand for automation across the business, IT leaders must have a clear understanding of the types of automation – and how they can drive value.

Automation solutions fit into a few categories.

- **Human task automation** targets manual, repetitive tasks, allowing teams to focus on more strategic activities.
- **Workflow automation** addresses a set of interconnected tasks.
- **Process automation** involves automating an entire business process end-to-end across an organization.

Automation doesn't just impact IT teams – it can help across the entire business. With new development tools powered by AI, automation solutions allow IT teams to use existing resources and personnel more efficiently, work within budgetary limitations, and focus on high-priority projects.

It's important to note that these automations must be created responsibly and incorporate IT oversight across all development activities. Additionally, they must provide business teams the autonomy to complete tasks while allowing IT teams to govern and monitor their solutions.

When IT teams can govern all business-developed automations from a centralized location, they can quickly ensure that all automation projects are secure and aligned with the organizational and external governance standards. At the same time, business teams can use low-code solutions with AI to connect multiple systems in a streamlined web-based user experience. This grants business users the autonomy to develop automations that serve immediate needs.

Meanwhile, IT is free to shift resources away from day-to-day business-oriented IT tasks, allowing them to shrink the IT delivery gap and focus on transformative projects that unlock innovation for the business and ultimately create exceptional customer and employee experiences.



Automation has been harder than it needs to be

Historically, there has been a disconnect between IT and business teams across the organization. When thinking about aspects of key technology initiatives, like delivery speed and quality, each side often has points of view that are diametrically opposed.

IT teams are focused on enabling business teams, managing automation solutions, and balancing delivering a realistic technical solution, among the numerous other tasks expected of them. Meanwhile, business teams are pressured to deliver revenue goals and optimize customer. To drive productivity and ultimately deliver exceptional customer experiences, the entire organization must be aligned and able to support each other as quickly and efficiently as possible.

Top Three Challenges to Automation

01. Inertia.

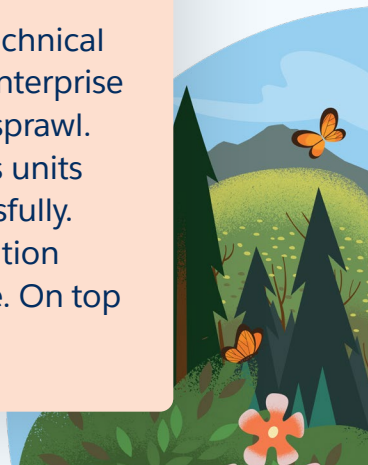
As with any strategic initiative in an organization, the biggest challenge is often considerable resistance to change. In many organizations, we've seen that teams are held back by processes that everyone knows are inefficient – often, the status quo trumps progress.

02. Accelerating expectations.

Increasingly high customer expectations of the businesses they interact with drives internal pressure to evolve, streamline, and improve processes. Organizations often need additional workers with specific technical skills to keep up with the innovation challenges ahead of them. In fact, the expected number of projects will increase by [39% from 2023](#).

03. Operating complexity.

These complexities arise from the technology and processes available. Technical debt creates friction to your organization's ability to adapt. The average enterprise reports using [nearly 1000 applications](#), leading to a complex ecosystem sprawl. And IT teams are not solely responsible for this friction, as other business units often try to solve technology challenges independently – often unsuccessfully. Additionally, your organization is likely attempting to navigate the application ecosystem sprawl and vastly complex compliance and security landscape. On top of this, AI has added additional complexities that require IT attention.



Only [26% of businesses](#) report providing a completely connected experience over all channels, leaving plenty of room for market disruption. Larger organizations are less likely to react to marketplace changes and shifting demands quickly, while new companies' innovative solutions emerge and disrupt the status quo. Customers now expect seamless experiences between platforms and applications, which means IT leaders need to adopt a comprehensive automation strategy that addresses the previous three challenges to thrive.

Automation is Key to Cost Savings

Operational Efficiency

13.5%

Average operational cost reduction with automation

Source: Automation: Profitability, Efficiency, and Time to Market Depend On It, IDC, 2023

Employee Productivity

1.9 Hours

Saved per week per employee on average through automation

Source: [State of IT 3rd Edition](#)



Begin building your automation strategy

Automation itself is not a new technology. Organizations have been automating using earlier automation technologies over 40 years. Today the breadth of capabilities available takes things to the next level, and that pace is only accelerating. In fact, [87% of IT leaders](#) expect more investment in automation at their organizations over the next 18 months. But how do you fully embrace automation and make it a fundamental piece of your organization's technology strategy?

First, it's critical to bring the right stakeholders together.



Getting started

Many technologies have gained traction within organizations through centers of excellence. However, the right approach is to build a center of enablement. What's the difference? This model works well for some organizations and may still be appropriate in some cases. But for organizations facing constant change to adapt, this approach needs to evolve and be more adaptable. That's where centers of enablement are a resource multiplier.

Center of excellence models requires IT to drive automation development, provide necessary resourcing, while interfacing with the rest of the organization. This model extends beyond the CIO's office and extends across the organization.

Center for enablement models empower business teams and require more effort to get started, but ultimately result in long-term benefits: scalability, agility, and often overlooked sustainability. Automation is not an end state – it's a ongoing journey.

Sourcing and prioritizing automations.

Once you have the center of enablement established. How do you strategize and implement? Organizations typically have no problem sourcing opportunities, while resourcing consistently proves challenging – how should your distributed teams tackle this?

Align to business priorities

The most impactful opportunities for automation will often span multiple business units. And aligning to key business priorities can help eliminate friction and roadblocks.

Identify low-hanging fruit

It's essential to take a grounded approach and not shy away from the most manageable challenges when starting your automation journey. To help prioritize we suggest a simple two-axis matrix, using risk and complexity as your primary evaluation metrics.

Establish a governance framework

It's as important as ever for IT to maintain oversight of the automations created within an organization. But today's model of IT as the ultimate gatekeeper (and, too often, unwitting roadblock) must change. It's critical to employ a governance and security framework that enables innovation instead of inhibiting it. Using the proper set of automation tools can help facilitate this.

8

Risk and complexity



Taking the modern approach to business process management

After you've established an automation strategy, it's important to use a modern approach to implementing your automations. This helps ensure continued success for your organization.

A Modern Approach to BPM

Key Principles



Domain
Ownership



Product
Mindset



Future
Focus

Domain ownership

Domain ownership – giving business teams agency over automations – is vitally important in the modern approach to automation, this means giving business users agency over their automations. For example, a controller will have more intimate knowledge of an accounts receivable process than a member of an IT organization will ever have. By meeting future automation users where they are and empowering them, you can ultimately build better automations.

Adopting a product mindset

For your long-term success, shifting from a project mindset to a product mindset is essential. A product mindset prioritizes the customer's point-of-view – whether that customer is internal or external – and understanding their challenges and needs in detail.

Next, your team will develop and deliver an automation. Post-delivery, keeping the project team together is critical to continue to evolve the automation. By iterating, continuously improving, and adapting that automation to meet customer needs over time, you can ensure that your investments in automation will be successful and worthwhile.



Future-proofing your organization

How can you make sure that automation is sustainable over the long term? It's critical to carefully prioritize your investments so they don't rapidly fall by the wayside and become obsolete. It's important to plan and build with a couple of concepts in mind.

Composability

In the mid-2010s, [microservices](#) gained an enormous amount of popularity in the realm of large-scale web application development. When thinking about business automations many of the microservices best practices also apply. Making your automations independently deployable and focused on a single business capability will maximize your ability to reuse automations over time. This approach will allow you to advance and create automations that can handle more complex tasks.

Discovery

A composability strategy is only complete with a complementary discovery strategy. In a large, distributed organization it's often impossible for development teams to have any peripheral vision and awareness of other teams. By opening up discoverability, teams across the organization can work together seamlessly and quickly. Giving your organization access to centralized automation asset catalogs or repositories is the easiest path to enabling discovery



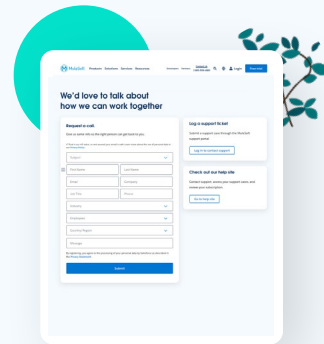
What's next?

Automation has found its place across the organization, but it takes a complete vision to establish correctly. Discover the benefits of automation firsthand with [MuleSoft Automation](#) and enable your business teams to self-serve while freeing up your IT teams to focus on critical innovations.

Adopt a trusted platform for automation and more.

Learn how MuleSoft can help your team increase productivity, democratize innovation, and ultimately create exceptional customer experiences.

[Get connected](#)



Explore top insights from IT leaders across the globe.

Get a comprehensive analysis of the trends shaping the IT landscape and how IT departments evaluate the role of AI, automation, integration, and APIs in the 2024 Connectivity Benchmark Report.

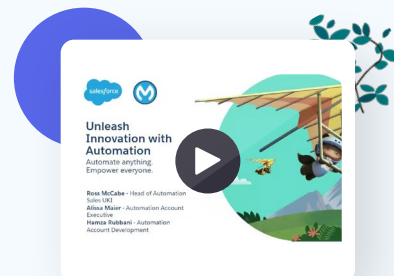
[Read now](#)



Dive deeper into automation.

Join us as we explore how business technologists and IT leaders can leverage business automation to unlock the full potential of Customer 360, streamline cross-functional collaboration, and improve productivity by cutting costs and saving time.

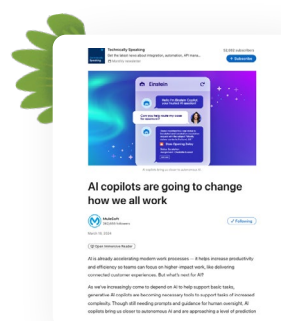
[Watch on-demand](#)



Keep up-to-date with MuleSoft

Get the latest news about integration, automation, API management, and AI with our newsletter, Technically Speaking.

[Get the scoop](#)





Salesforce, the global CRM leader, empowers companies of every size and industry to digitally transform and create a 360° view of their customers. For more information about Salesforce (NYSE: CRM), visit Salesforce.com.

Any unreleased services or features referenced in this or other press releases or public statements are not currently available and may not be delivered on time or at all. Customers who purchase Salesforce applications should make their purchase decisions based upon features that are currently available. Salesforce has headquarters in San Francisco, with offices in Europe and Asia, and trades on the New York Stock Exchange under the ticker symbol “CRM”.

For more information please visit Salesforce.com, or call [1-800-No-Software](tel:1-800-No-Software).

MuleSoft is a registered trademark of MuleSoft, inc., a Salesforce company. All other marks are those of respective owners.