Skan AI

OPTIMIZE AUTOMATION WITH AI FOR ENTERPRISES

Maximizing the Value of AI + Automation



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Executive Summary

Why Automation Is Your Competitive Edge



Your teams are missing one key ingredient that can make their automation programs invaluable...

In this guide, you will learn why **process intelligence** is often the missing piece to making your automation program a profit center, not just a cost center. While basic automation or Robotic Process Automation (RPA) is often recognized as the fastest growing, most successful business technology, automation projects often fail, or stall, with the ROI falling far short of its potential.

So how do you systematically accelerate a large organization's transformation?

From insufficient process understanding to lack of prioritization for automation programs, there might be roadblocks at each step of the automation journey preventing consistent results at a competitive pace. We will break down each step of the automation journey, discuss challenges in legacy process discovery methods, and showcase how process intelligence technology can help you become an automation hero.

30%

Gartner says 30% of enterprises will automate more than half of their network activities by 2026.

1 - Gartner

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This guide was designed for:

CoE Automation leaders exploring automation opportunities but unsure where to start prioritizing initiatives across shared services operations.

Process Excellence teams that have implemented successful automations but struggle to identify similar high-value ROI opportunities across service portfolios.

Change Management leaders with implemented automation programs for backend operations, but too many exceptions exist or full benefits remain unrealized.

Shared Services and Global Capture Center leaders with advanced automations who still lose time convincing business unit P&L owners to approve improvements.

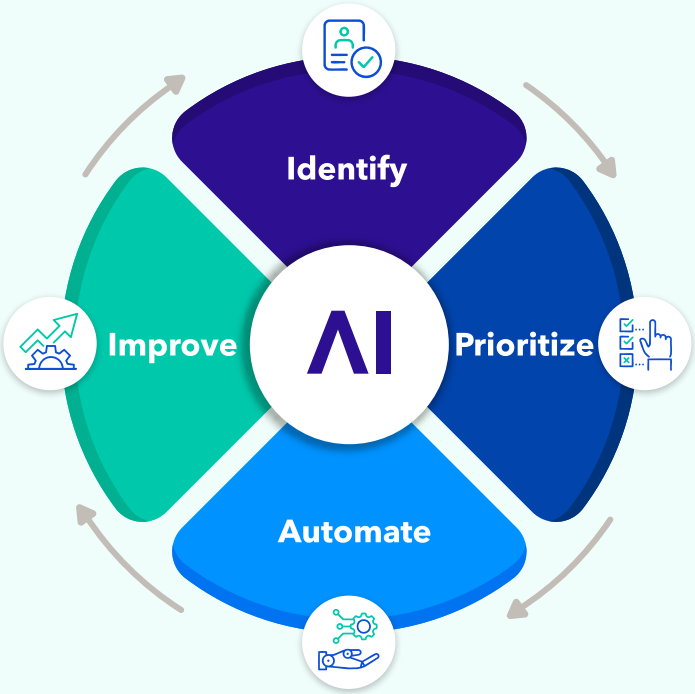


Overview

4 Phases Of Automation Optimization



The journey to automation involves 4 major steps:



Think of automation as an **evolution, not a revolution**—a series of intelligent iterations rather than a one-time initiative. The four-step framework is your competitive playbook, transforming automation efforts from cost centers into profit-generating machines.

When executed strategically, these steps leverage real operational intelligence to dissect digital workflows in real time. This surfaces high-impact opportunities that legacy methods miss entirely. Organizations can evaluate these prospects through sophisticated cost-benefit analysis, defining precisely scoped iterations that deliver measurable value.

This data-driven approach automatically generates actionable opportunities, dramatically boosting productivity while enabling confident, resource-efficient testing. By anchoring every initiative in hard metrics rather than gut instincts, benefits become quantifiable assets that fuel change management and drive organization-wide user adoption.

Each iteration's calculated ROI becomes ammunition for securing increased automation investment, creating a self-reinforcing cycle of growth and optimization. Meanwhile, legacy discovery methods stumble through each step with fundamental blind spots that prevent automation leaders from unlocking their organization's true potential—leaving millions in value trapped within inefficient processes.

Improved Resilience

"Infrastructure and operations (I&O) leaders are increasingly looking to AI-based analytics and augmented decision making, including intelligent automation (IA), to improve operational resilience..."

– Chris Saunderson, Sr. Director Analyst at Gartner

2 - Gartner

Phase 1

Identify The Best Automation Opportunities



The Legacy Identification Problem

Legacy enterprise systems are fundamentally designed for operational stability, not automation discovery. These decades-old platforms create massive blind spots that prevent organizations from identifying their most valuable automation opportunities, resulting in **millions of dollars of inefficient waste**.



SILOED SYSTEM ARCHITECTURE

Traditional enterprise environments consist of disconnected mainframes, departmental databases, and standalone applications that don't communicate effectively. A typical Fortune 500 company might have invoice processing scattered across SAP ERP, Oracle Financials, legacy COBOL systems, and dozens of departmental spreadsheets. This fragmentation makes it nearly impossible to identify end-to-end processes that cross system boundaries—precisely where the highest-value automation opportunities exist.

LIMITED MONITORING CAPABILITIES

Legacy systems lack the sophisticated logging and monitoring infrastructure needed for process discovery. Mainframe applications running decades-old COBOL code often provide minimal visibility into user actions, processing times, or workflow bottlenecks. IT teams can see that a batch job completed, but have no insight into the manual data preparation, error handling, and validation steps that consume hundreds of employee hours weekly.

RIGID REPORTING STRUCTURES

Traditional systems generate static reports that show what happened, not how work flows through the organization. A bank's legacy loan processing system might report daily application volumes but provide no visibility into the manual document verification, cross-referencing, and approval routing that creates processing delays and compliance risks worth millions in potential efficiency gains.

41%

A 2024 Gartner survey found that 41% of marketing decision makers have already significantly automated their customer journeys, with the remaining 59% partially automated.

3 - Gartner

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Process Intelligence: The Revenue-Focused Solution

Process intelligence from Skan AI transforms automation identification from an art to a science, using advanced analytics and AI to **automatically discover, quantify, and prioritize opportunities** based on measurable business impact rather than intuition.



COMPREHENSIVE WORKFLOW MAPPING

Skan AI's platform captures digital breadcrumbs across entire technology ecosystems, creating complete process visualizations that reveal hidden inefficiencies. Skan AI can identify patterns such as customer onboarding involves 47 manual steps across 8 different applications, consuming 12 hours per customer and creating $2.3 million annually in operational costs—insights impossible to gather through traditional methods.



QUANTIFIED BUSINESS IMPACT

Rather than pursuing automation based on assumptions, Skan AI calculates precise ROI metrics for each opportunity. It identifies that automating invoice matching could eliminate 15,000 manual hours annually while reducing error rates by 94%, translating to $1.8 million in direct savings plus additional revenue from faster payment processing and improved vendor relationships.



DYNAMIC OPPORTUNITY DISCOVERY

Skan AI operates continuously at-scale to automatically detect new automation candidates as business processes evolve and market conditions change. During peak seasons, it identifies temporary process variations that create automation opportunities worth hundreds of thousands in efficiency gains, enabling organizations to capture value from seasonal workflows that traditional analysis would miss.

660+ intents

Case study: Real-world results

One enterprise thought they had ~500 unique intents in their processes. Skan AI discovered over 600, exposing inefficiencies the client never knew existed.

This wasn't just an insight—it fundamentally changed how this organization saw their own process structure and optimization potential.

Phase 2

Prioritizing Automation For Optimal Business Impact



The Legacy Prioritization Problem

Once automation opportunities are identified, legacy approaches to prioritization often lead organizations down costly paths that consume resources while delivering minimal business value. Traditional prioritization methods rely on outdated frameworks that fail to account for the **complex interdependencies and strategic implications** of modern enterprise automation.



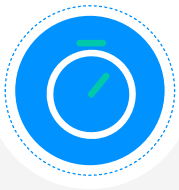
SUBJECTIVE SCORING MATRICES

Typically involves business analysts creating scoring matrices that rate opportunities based on subjective criteria like "ease of implementation" and "business impact" using arbitrary 1-5 scales. These matrices are heavily influenced by stakeholder politics, departmental bias, and personal preferences rather than objective data. A CFO might champion automating expense reporting because it affects their daily workflow, while ignoring higher-value procurement processes that could save millions but aren't visible to executive leadership.



TECHNICAL COMPLEXITY BIAS

Legacy IT organizations often prioritize automation based on technical familiarity rather than business value. Teams gravitate toward automating processes within systems they understand—like simple data entry tasks in familiar applications—while avoiding complex but high-value processes that span legacy mainframes, cloud applications, and manual workflows. This results in automation of low-impact activities while million-dollar opportunities remain untouched.



SHORT-TERM THINKING

Traditional prioritization frameworks focus on immediate, measurable savings rather than strategic business transformation. Organizations automate obvious tasks like data migration or report generation while ignoring processes that could accelerate revenue cycles, improve customer experience, or create competitive advantages. The result is tactical automation that reduces costs marginally while missing opportunities for substantial business growth.

Key insight!



Case study: Real-world results

A client assumed reducing time between actions (e.g., Ctrl+C → Ctrl+V) would drastically cut wait time.

Skan AI revealed that wait time was already minimal, shifting focus instead to optimizing workflow structure rather than micro time reductions. This saved the client significant time and cost by not pursuing automations that had far less impact than the enterprise team believed.

Strategic Value-Based Prioritization

The new way to prioritize automation opportunities is to leverage advanced analytics through Skan AI's process intelligence. **This ranks opportunities based on comprehensive value calculations.** These account for direct savings, strategic impact, risk reduction, and long-term competitive advantage.



MULTI-DIMENSIONAL VALUE ANALYSIS

Skan AI evaluates automation opportunities across multiple business dimensions simultaneously. For example, automating customer complaint resolutions could deliver not just hundreds of thousands in labor savings, but also millions in retained revenue through improved customer satisfaction. Now add on regulatory compliance cost avoidance. This is the value traditional methods can completely miss.



CASCADING IMPACT MODELING

Skan AI's forecasting solutions estimates how automating one process creates downstream improvements for key business metrics. For instance, automating supplier onboarding doesn't just save procurement time; it accelerates time-to-market for new products, improves cash flow management, and reduces supply chain risk—compound benefits worth 10x the initial process savings.



REAL-TIME REPRIORITIZATION

Skan AI's prioritization reports continuously adjust rankings based on changing business conditions and automation program progress. For example, when supply chain disruptions emerge, procurement automation suddenly becomes higher priority; when customer churn increases, retention-focused processes move to the top of the queue.

Aha moment!

Case study: Real-world results

Before Skan AI, one enterprise had no idea that many employees depended on manual reminders in Outlook or via fax, leading to serious inconsistencies in follow-up time.

With an automated follow-up system, they've dramatically reduced manual effort and errors.

Phase 3
Automate and Measure



The Legacy Implementation Problem

Traditional automation approaches are plagued by rigid methodologies, monolithic architectures, and waterfall development cycles. All this turns promising automation opportunities into **expensive, time-consuming projects** with questionable returns. Legacy implementation practices often transform simple process improvements into complex technical nightmares that take years to deploy and fail to deliver value.



MONOLITHIC AUTOMATION ARCHITECTURES

Legacy automation platforms require building comprehensive solutions before any value is realized. A typical enterprise might spend 18 months developing a complete accounts payable automation system that integrates with ERP, document management, and approval workflows, only to discover that business requirements changed, key stakeholders left, underlying systems have been upgraded, etc. This all-or-nothing approach creates massive implementation risk and delays that critical time-to-value indefinitely.



RIGID DEVELOPMENT METHODOLOGIES

Traditional IT organizations apply waterfall development approaches to automation projects, requiring extensive upfront requirements gathering, detailed technical specifications, and lengthy approval cycles. A procurement automation project might spend six months in requirements analysis, another four months in development, and six more months in testing and approval—by which time the procurement team has already implemented manual workarounds and lost interest in the automation solution.



SINGLE VENDOR LOCK-IN

Traditional automation implementations often standardize on single-vendor platforms that promise comprehensive solutions but deliver rigid, inflexible systems. Organizations invest millions in enterprise automation suites only to discover they can't adapt to changing business needs, integrate with newer technologies, or scale beyond their initial use cases. The result is expensive technical debt that constrains future automation initiatives.

20%

Case study: Real-world results

Skan AI's analysis uncovered that 20% of work time was spent in **Outlook and Teams,** which weren't classified as process applications. This raised the question of whether they should be reclassified or optimized.

Seeing usage of every application widens the view to evaluate automation opportunities as the old way as a narrow view that misses these trends.

Agile, Composable Implementation Strategies

Current approaches need to leverage agile methodologies, composable architectures, and user-centric design. This delivers rapid value while maintaining flexibility for future evolution and scaling. The transformation from legacy implementation approaches to agile, composable strategies enables organizations to **deliver automation value in weeks rather than years**, while building flexible platforms that support continuous business evolution and competitive advantage.



INCREMENTAL VALUE DELIVERY

Advanced implementation approaches break complex automation initiatives into discrete, value-generating components that can be deployed independently. Rather than building a complete customer onboarding system, teams implement document validation, then automated routing, then approval workflows. Each step delivers measurable value within weeks while building toward a comprehensive solution. This reduces risk, accelerates ROI, and maintains stakeholder engagement.



CONTINUOUS USER ENGAGEMENT

Advanced implementation methodologies embed user experience design and change management throughout the development process. Business users participate in prototype testing, provide iterative feedback, and help refine automation workflows before full deployment. This collaborative approach ensures automation solutions align with actual work patterns, reduces adoption friction, and creates internal champions who drive broader organizational acceptance.



INTELLIGENT SCALING FRAMEWORKS

Sophisticated implementation strategies include built-in scaling mechanisms that enable successful automation patterns to be replicated across similar processes and departments. When invoice processing automation proves successful in accounts payable, the same framework can be rapidly adapted for purchase order processing, expense management, and vendor onboarding—multiplying implementation ROI across the enterprise.

Days → Seconds

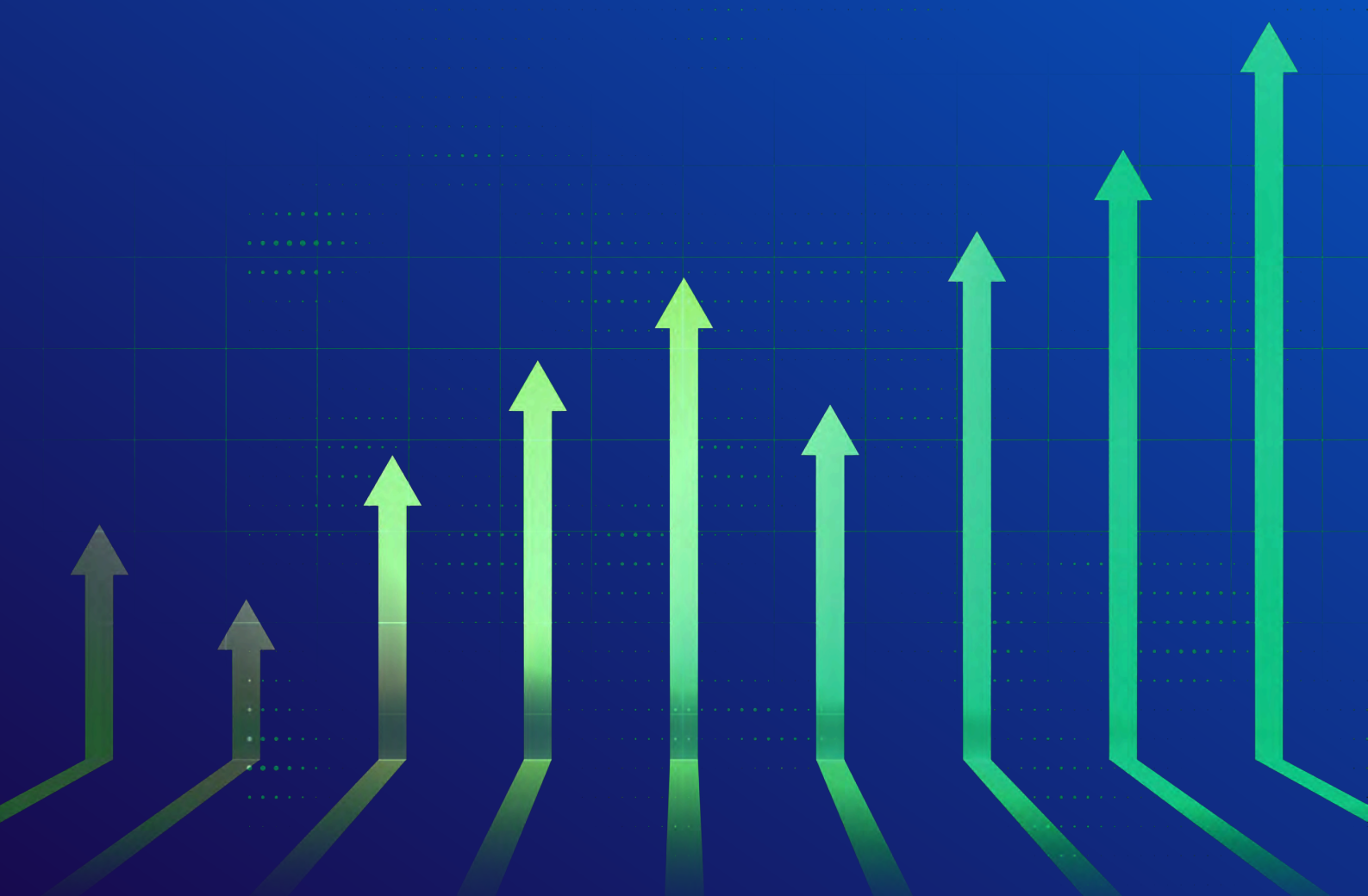
Case study: Real-world results

Once Skan AI insights are implemented, tasks that used to take teams weeks of manual effort, like compiling reports is now automated, drastically reducing analysis time.

This saves time, effort, and resources that can be repurposed to continue driving the bottom line.

Phase 4

Drive Continuous Improvement



The Legacy Measurement Problem

The old way of measuring automation success relies on superficial metrics and fragmented data sources that fail to capture true business value or enable meaningful continuous improvement. Legacy measurement frameworks often **create false confidence** in automation programs while missing critical insights that could drive exponential value growth.



ISOLATED SYSTEM REPORTING

Traditional measurement approaches pull data from individual automation tools in isolation, creating fragmented views that miss cross-system impacts and interdependencies. Finance might report that invoice processing automation reduced processing time by 30%, while customer service simultaneously experiences increased complaint volumes due to payment delays caused by automation errors—a connection that isolated reporting completely misses.

STATIC BASELINE ASSUMPTIONS

Legacy measurement frameworks establish initial baselines and track improvements against those fixed points, failing to account for evolving business conditions, market changes, or strategic shifts. An automation program might show consistent 20% efficiency gains against last year's metrics while missing that competitors have achieved 60% improvements, or that changing customer expectations have made the original process objectives obsolete.

LIMITED DATA INTEGRATION

Traditional enterprise systems store automation performance data in siloed repositories that can't be easily combined with broader business intelligence. Automation teams track technical metrics in their platforms while business outcomes remain trapped in separate ERP, CRM, and financial systems. This fragmentation prevents organizations from understanding the true ROI of automation investments or identifying optimization opportunities.

$50M in annual savings

Case study: Real-world results

Business leaders often struggle to quantify inefficiencies. When Skan AI's analysis revealed a direct $50 million in savings per annum for one client, it wasn't just an insight—it was a wake-up call.

Strategic Value-Driven Measurement

The new way of measurement leverages process first-party enterprise data and predictive analytics to drive continuous improvement. **When collected through Skan AI's process intelligence solution,** it maximizes strategic value realization.



BUSINESS OUTCOME CORRELATION

Advanced measurement platforms connect automation performance directly to business outcomes via comprehensive data integration. Instead of measuring bot uptime, organizations track how automation improvements correlate with revenue growth, customer satisfaction increases, and market share expansion. A customer onboarding automation isn't measured by processing speed alone, but by impact on customer lifetime value, retention rates, and revenue per customer—revealing that optimization efforts should focus on personalization features rather than pure efficiency.



CONTINUOUS OPTIMIZATION LOOPS

Continuous feedback loops are a necessity now. Businesses need real-time data to spot when usage patterns change. Continuous monitoring from Skan AI can observe usage automatically, adjusting automation scoring, and modify workflow priorities to maintain optimal business outcomes. This creates self-improving automation ecosystems that become more valuable over time.



PROPRIETARY INTELLIGENCE GENERATION

The most sophisticated measurement frameworks transform automation data into proprietary business intelligence that creates competitive advantages. Process performance patterns, optimization insights, and operational benchmarks become valuable assets that inform strategic decision-making, enable predictive planning, and create differentiated market positioning that extends far beyond operational automation benefits.

500+ obstacles to automation

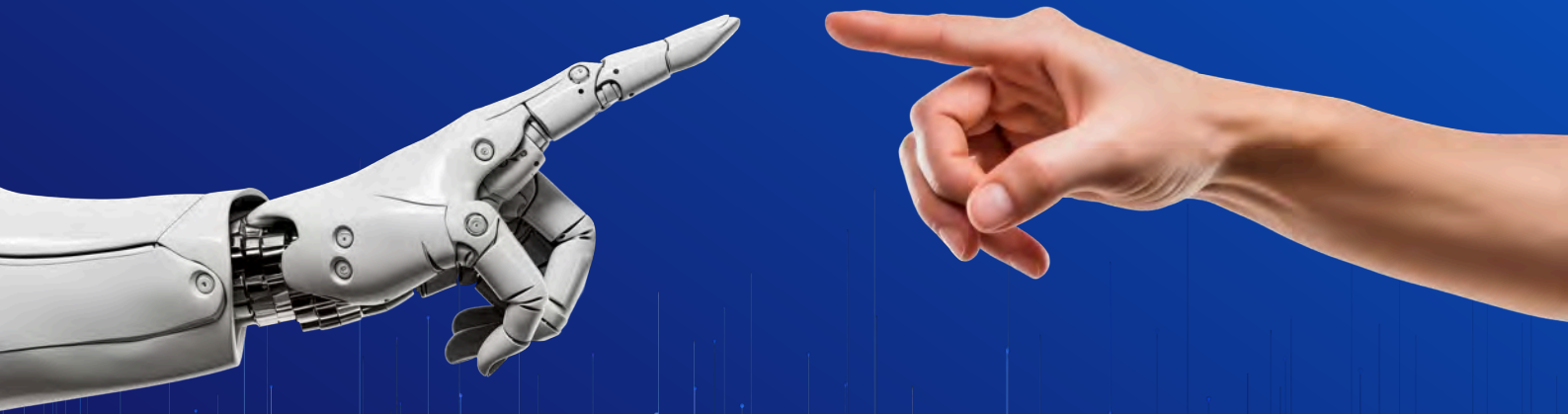
Case study: Real-world results

The client previously thought automation failures were "random inefficiencies".

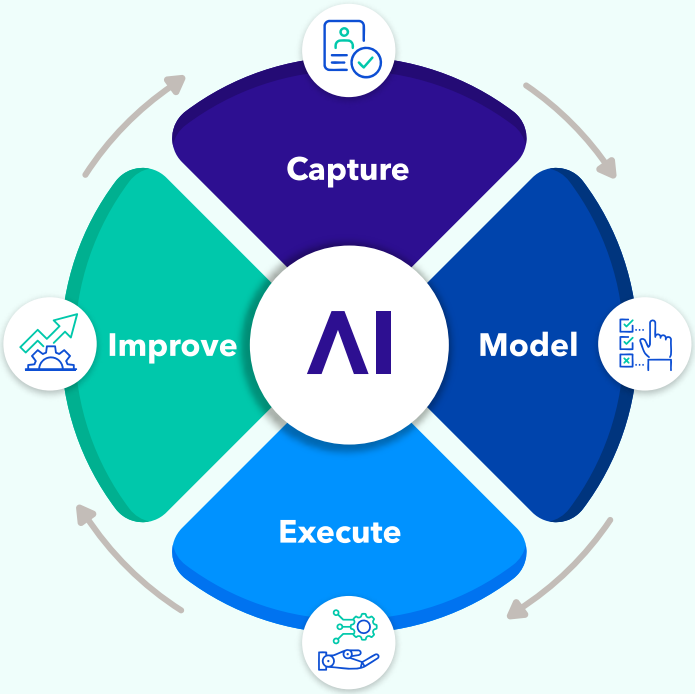
But when Skan AI identified 500+ exact reasons why automation couldn't proceed, it completely changed their approach—now they had a clear roadmap for fixing automation failures.

Conclusion

The Future Of Automation Is Agentic



The journey to Agentic AI involves 4 critical steps:



Agentic AI is a revolution—A series of intelligent agentic iterations rather than a one-time AI deployment. The four-step framework outlines your next steps, converting agentic AI efforts from scattered attempts to a enterprise-wide transformation.

When implemented with precision, these approaches harness authentic operational data to analyze digital processes dynamically, empowering autonomous AI frameworks to identify transformative possibilities that traditional approaches overlook completely. Companies can assess these opportunities using advanced return-on-investment modeling, establishing clearly defined automated cycles that generate quantifiable benefits through smart process optimization.

This metrics-based methodology automatically creates implementable prospects for autonomous AI integration, substantially enhancing efficiency while enabling assured, resource-efficient testing of self-directing systems. By grounding each automated initiative in concrete analytics rather than human instincts, advantages transform into measurable assets that accelerate organizational transformation and drive enterprise-wide adoption of intelligent automation.

Every intelligent iteration's quantified benefits become capital for acquiring additional AI resources, generating a self-sustaining cycle of development and enhancement through automated systems. Conversely, conventional discovery techniques struggle through various stages with inherent blind spots that hinder automation directors from realizing their organization's actual autonomous capabilities—leaving millions in opportunities confined within operations that digital agents could completely transform.

The Future of Enterprise Automation: Agentic AI and Process Intelligence

The four-phase automation optimization framework represents the foundation for enterprise transformation. But the future belongs to data-first agentic AI systems powered by advanced process intelligence that **transcend traditional automation boundaries.** Current automation handles predefined processes with rigid workflows. However, agentic AI creates intelligent systems that collaborate with human employees through autonomous decision-making, adaptive problem-solving, and strategic business reasoning.



Skan AI's data-first process intelligence platform provides the critical foundation that enables agentic AI to understand complex enterprise workflows alongside human expertise, identify optimization opportunities, and make informed decisions about process improvements. This symbiotic relationship transforms automation from rule-based task execution into intelligent human-AI business orchestration.



Data-first agentic AI transforms optimization phases by partnering with human employees. AI agents continuously discover process improvements across enterprise ecosystems while leveraging human domain knowledge. Intelligent agents collaborate with business leaders to dynamically optimize project portfolios based on real-time conditions and strategic objectives.



Implementation becomes collaborative, with AI agents working alongside human operators to configure workflows, adapt to system changes, and scale solutions while maintaining human oversight for critical decisions. Measurement evolves into predictive intelligence, where agents partner with analysts to anticipate needs and optimize performance.



The convergence of data-first agentic AI, human expertise, and process intelligence creates self-improving enterprises that continuously optimize through human-AI collaboration, turning automation from project-based initiatives into the fundamental operating system of competitive advantage.

10x cost savings

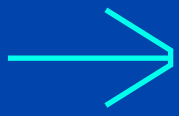
Learn more

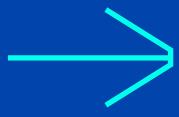
Case study: Real-world results

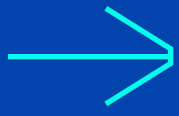
Based on Skan AI's insights, one client implemented recommendations that yielded a 19% improvement in utilization, a 14% productivity lift, and 16% faster time to close an individual case.

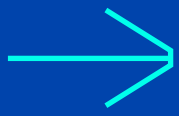
Drive Automation for Your Enterprise

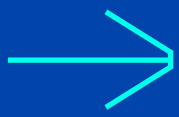
Lead your organization on a high-value, maximum-impact automation journey.

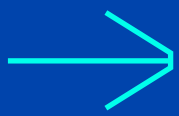
The Agentic AI Gold Rush 

Strategic Role of First-Party Data in Agentic AI 

The Automation Revolution 

9 Key Use Cases for Agentic AI: How to Unleash Automation 

Top 10 Agentic AI Automation Uses 

Automation Explorer by Skan AI 

Your Automation Wins Await.

Speak with one of our experts to launch your automation success.

Book a Call

