















SS&C Intelligent Automation Maturity Model

-  Primary goal
-  COE & staffing models
-  Depth of automation
-  Talent & change management








-  Tools
-  Business adoption

-  Scope of automation

1 TRADITIONAL

-  Small efficiency gains
-  POCs & experiments
-  Superficial
-  Little self-learning and experimenting
-  Small pockets working outside of normal IT stack
-  Small tasks by front-line processing staff
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 - Macros
 - Scripts
 - Native Workflow

2 INCREMENTAL

-  Cost reduction
-  Business unit-level POCs & pilot programs
-  Digital routing | Centrally-managed workflow | Process-oriented automations
-  Self-learning | Non-organized upskilling | Change management struggles
-  Heavy reliance on tech and/or contractors for roadmap and enablement
-  Repetitive processes conducted by staff, mainly offshore (where applicable)
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 - RPA
 - OCR
 - BPM
 - Native Workflow





3 ORGANIZED

-  Cost and risk reduction
-  Distributed programs
Startup COEs
-  Programs target E2E workflows
-  Formal, organized programs form
-  Newly-created roles:
 - Citizen developers
 - Power users
 - Business & product owners
-  Automations targeting more complex processing roles
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 - RPA
 - OCR/ICR
 - BPM
 - Native Workflow
 - APIs
 - Rules Engine
 - Low Code

4 SCALED

-  Cost and risk reduction | Customer experience
-  Enterprise COE
-  Organized, enterprise-level solutions for E2E customer journeys
-  Core competency | Structured, organized upskilling/reskilling programs
-  Business drives product roadmaps & platform decisions
-  Automations begin to target domestic, analyst-based functions
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 - RPA
 - OCR/ICR
 - BPM
 - Native Workflow
 - APIs
 - Rules Engine
 - Low Code
 - ML
 - NLP

5 AUTONOMOUS

-  Enterprise-level transformation
-  Global COE
-  Fully re-thought processes and experiences transforming entire value streams
-  Enterprise-wide core discipline
-  Democratized and business outcome-focused at all levels
-  Roles at all levels in scope for some level of automation; new roles present across enterprise
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 - RPA
 - OCR/ICR
 - BPM
 - Native Workflow
 - APIs
 - Rules Engine
 - Low Code
 - ML
 - NLP/NLG
 - AI

Accelerate straight-through processing with low-code intelligent automation. [Learn more at ssctech.com/chorus](https://ssctech.com/chorus)

