ZINNOV ZONES
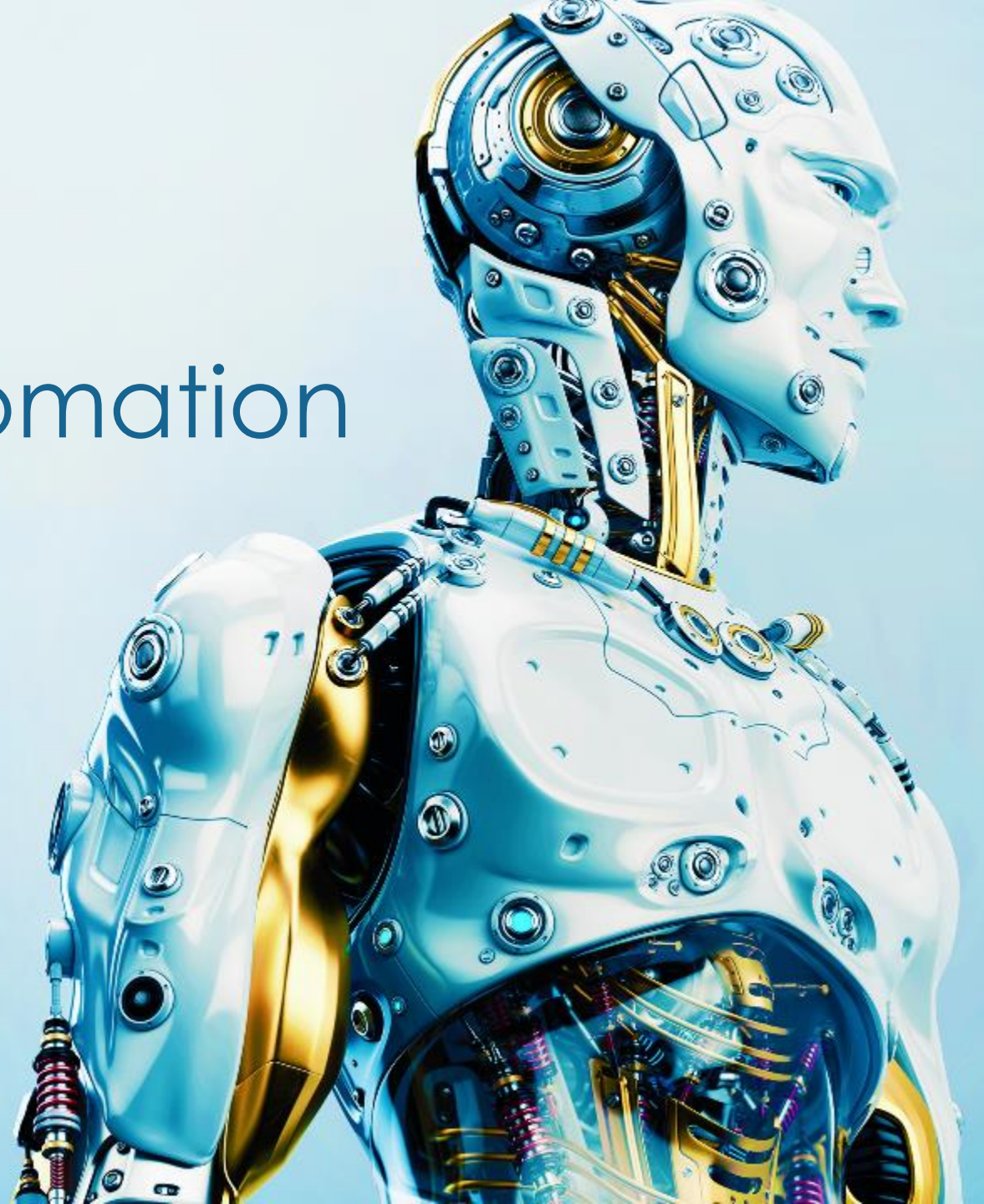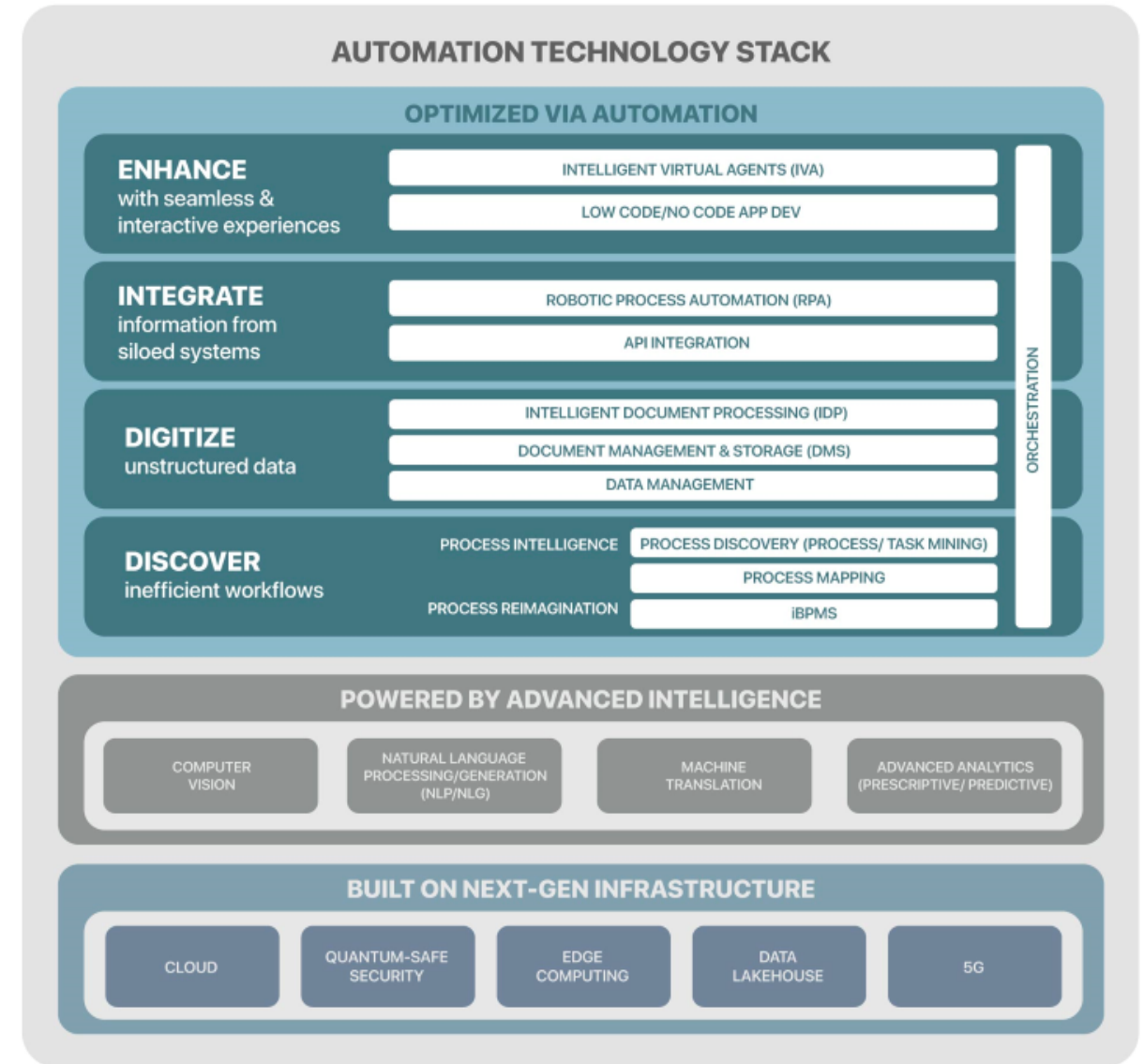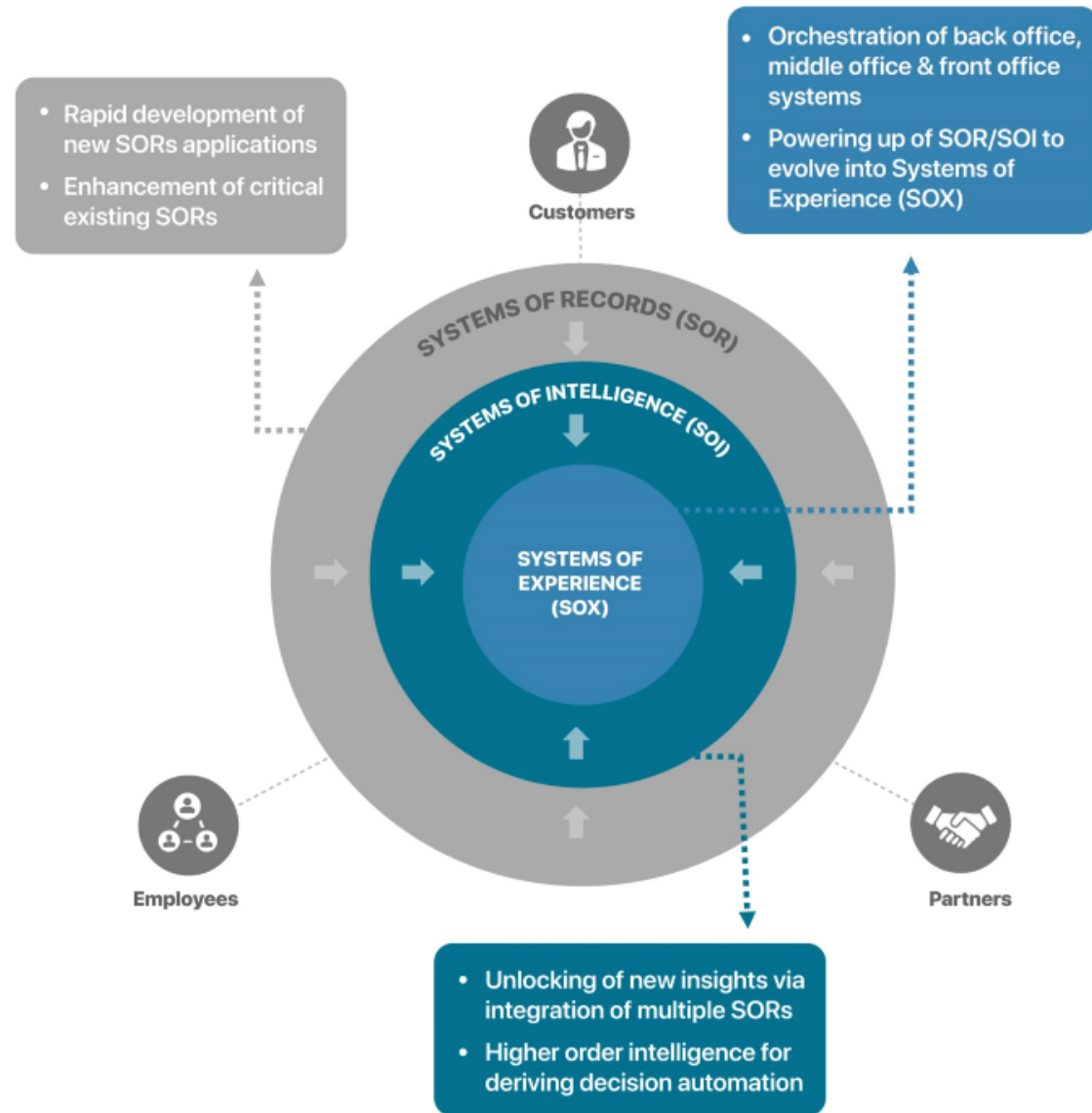## Hyper Intelligent Automation

H1 2022

AMELIA

Reimagining modern business tech stack with Hyper Intelligent Automation (HIA)

zinnov ZONES

- Rapid development of new SORs applications
- Enhancement of critical existing SORs

Customers

- Orchestration of back office, middle office & front office systems
- Powering up of SOR/SOI to evolve into Systems of Experience (SOX)

SYSTEMS OF RECORDS (SOR)

SYSTEMS OF INTELLIGENCE (SOI)

SYSTEMS OF EXPERIENCE (SOX)

Employees

Partners

- Unlocking of new insights via integration of multiple SORs
- Higher order intelligence for deriving decision automation

AUTOMATION TECHNOLOGY STACK

OPTIMIZED VIA AUTOMATION

ENHANCE
with seamless & interactive experiences
- INTELLIGENT VIRTUAL AGENTS (IVA)
- LOW CODE/NO CODE APP DEV

INTEGRATE
information from siloed systems
- ROBOTIC PROCESS AUTOMATION (RPA)
- API INTEGRATION

DIGITIZE
unstructured data
- INTELLIGENT DOCUMENT PROCESSING (IDP)
- DOCUMENT MANAGEMENT & STORAGE (DMS)
- DATA MANAGEMENT

DISCOVER
inefficient workflows
- PROCESS INTELLIGENCE — PROCESS DISCOVERY (PROCESS/ TASK MINING)
- PROCESS MAPPING
- PROCESS REIMAGINATION — iBPMS

ORCHESTRATION

POWERED BY ADVANCED INTELLIGENCE

- COMPUTER VISION
- NATURAL LANGUAGE PROCESSING/GENERATION (NLP/NLG)
- MACHINE TRANSLATION
- ADVANCED ANALYTICS (PRESCRIPTIVE/ PREDICTIVE)

BUILT ON NEXT-GEN INFRASTRUCTURE

- CLOUD
- QUANTUM-SAFE SECURITY
- EDGE COMPUTING
- DATA LAKEHOUSE
- 5G

Source: Zinnov Analysis

Zinnov Zones Hyper Intelligent Automation (HIA) - H1 2022 Segments

01 Hyper Intelligent Automation (HIA)

HIA TECHNOLOGY ZONES

02 Low Code/No Code (LC/NC) Application Development

03 Robotic Process Automation (RPA)

04 Intelligent Document Processing (IDP)

05 Process Intelligence

06 Intelligent Virtual Agent (IVA)

07 Orchestration

HIA INDUSTRY VERTICAL ZONES

08 Banking & Financial Services

09 Insurance

10 Manufacturing

11 Retail & CPG

12 Healthcare & Life Sciences

Snapshot of Zinnov Zones Final Rating Matrix

Zinnov evaluated participating companies on two key areas basis which they were be plotted on a 2-dimensional graph

| 1 | HIA Prowess | 2 | Scalability |

The cumulative score based on HIA Prowess (x value) and Scalability in HIA Business (y value) used to classify automation platforms in **Zinnov Zones** framework

Scalability of HIA Business

- ➢ **Financial Health**
- ➢ **Depth of Customer Penetration**
- ➢ **Platform Funding**
- ➢ **Partner Channel Strength**

Positioning reflects the scores in HIA Prowess and Scalability

HIA Prowess

Technical Capabilities
(Capabilities across HIA Stack: Process Intelligence, IDP, Low Code/No Code Application Development, RPA, Intelligent Virtual Agent, Orchestration)

- ➢ **Business Model**
- ➢ **Market Visibility**
- ➢ **Pricing and Deployment Model**

Comprehensive framework to evaluate the HIA Prowess

HIA Prowess is estimated considering the following key parameters:

➢ **Technical Capabilities**	Capabilities across HIA Stack – RPA, IDP, Low-Code/No-Code Application Development, Process Intelligence, IVA, Orchestration etc.	Company Vision and Strategy (including market expansion plans, product updates, product portfolio expansion roadmap, etc.)| Ecosystem Leverage		Acquisitions and Investments
➢ **Business Models**	Ability to deliver across Business Models: Platform Licenses/ Subscription vs. Professional Services
➢ **Pricing and Deployment Model**	Pricing: User Based, Volume (BOT/Workflow/Process) Based, Outcome Based, etc.	Deployment: On-premise vs Cloud deployment
➢ **Market Visibility**	Thought leadership	Market Visibility Events

Cumulative Score on the HIA Prowess parameters defines the horizontal position of Automation Platforms in **Zinnov Zones** framework

Comprehensive framework to evaluate the HIA Scalability

Scalability has been broken down into four key parameters:

| Parameter	Metrics
➤ **Financial Health**	Total HIA Revenue | HIA Revenue Growth
➤ **Depth of Customer Penetration**	Total Customers | Revenue per Customer | Customer Retention Rate | Customer Footprint across Industry verticals
➤ **Platform Funding**	Total External Funding Raised
➤ **Partner Channel Strength**	Scale of Partner Channel | Impact of Partner Channel on Sales

Cumulative Score on the Scalability parameters defines the vertical position of Automation Platforms in **Zinnov Zones** framework
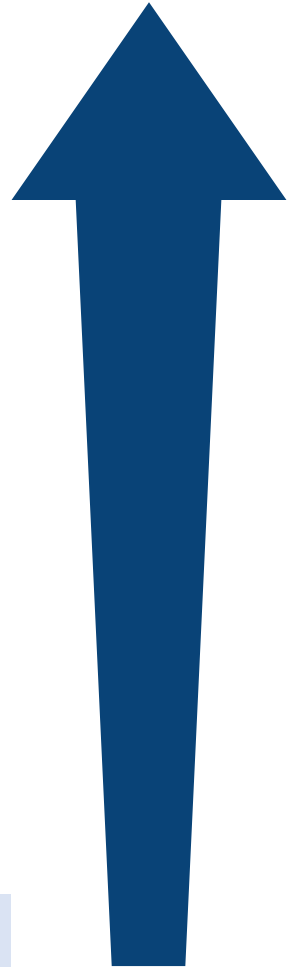
3-pronged approach for detailed analysis of Zones participants

Zinnov Zones Rating Process

INPUTS FROM PARTICIPANTS

- RFI responses garnered from the Zones participants
- Follow-up briefing calls and product demo
- Customer reference calls

SECONDARY RESEARCH

- Company Website; Press Releases; Public Announcements
- Industry Databases; Analyst commentary
- Twitter, LinkedIn, other Social Media, etc.

PRIMARY RESEARCH

- End Customers/Enterprises/GICs – **100+**
- Partners/GSIs/SPs – **20+** leading SIs (large and mid-tier)
- Developers – **500+**
- Industry SMEs/Experts – **5+**

Amelia: Company Overview

OVERVIEW

FOUNDED
1998
(CEO: Chetan Dube)

HEADQUARTER
New York (US)

HEADCOUNT
800+

CUSTOMERS
~600

PARTNERS
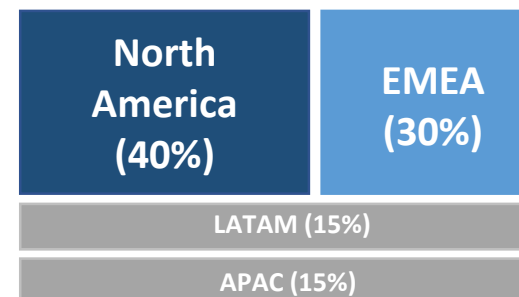100+ Consulting /
Implementation partners

MARQUEE CLIENTS

Bankia

Telefónica

Staffmark Group

FALABELLA

BNP PARIBAS

NN

SECURUS Technologies

TOYOTA Financial Services

STERLING NATIONAL BANK

TriStar
Engineered Plastic Solutions™

CGI

MARQUEE PARTNERS

DXC TECHNOLOGY

Google

accenture

IBM

Microsoft

Capgemini

FUJITSU

REVENUE SEGMENTATION

BY TOP 5 INDUSTRIES

20%	BFS
15%	Insurance
15%	Healthcare & Life Sciences
5%	Retail & CPG
35%	Others*

BY GEOGRAPHY

North America (40%)	EMEA (30%)
LATAM (15%)	
APAC (15%)	

CUSTOMER SEGMENTATION

BY DEPLOYMENT MODE

95% Cloud

5% On-Premise

BY GTM CHANNEL

~500 Partner-Led

~220 Direct
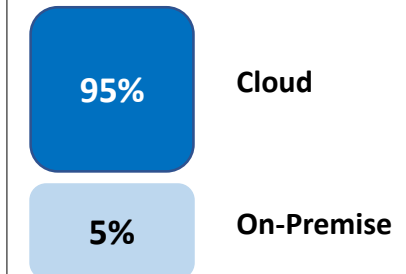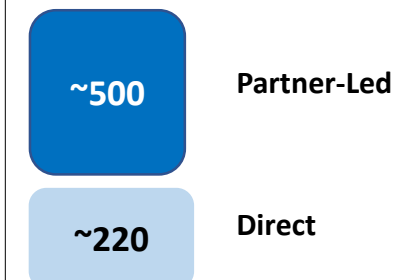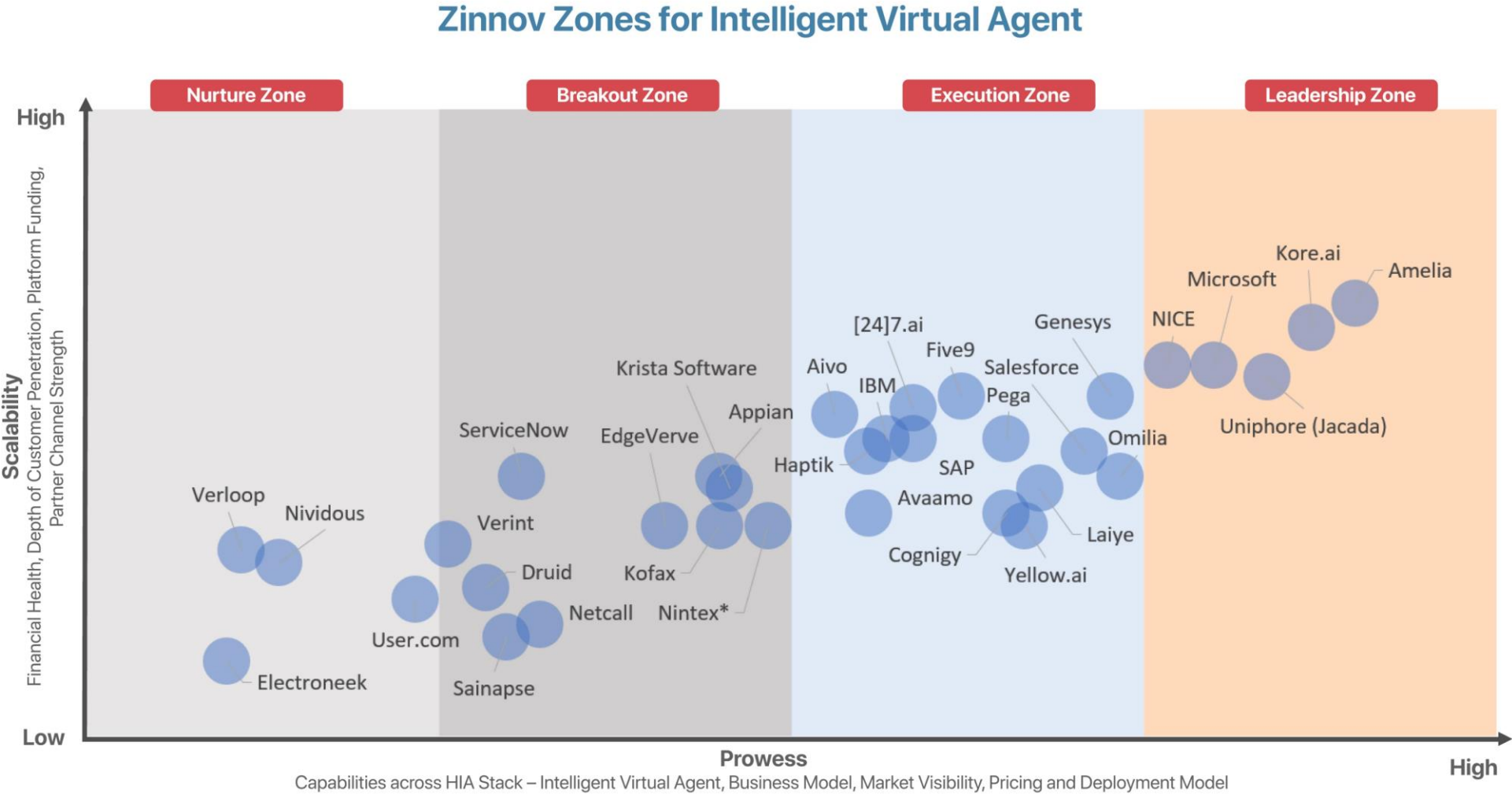
- ~98% of customers are large enterprises (more than 1000 FTEs)
- 75% of revenue is derived from Cloud as the deployment model

Note:- *Others include industries – Telecom, Service Providers etc.

Zinnov Zones for Intelligent Virtual Agent- H1 2022

Zinnov Zones for Intelligent Virtual Agent

Nurture Zone | Breakout Zone | Execution Zone | Leadership Zone

Scalability — Financial Health, Depth of Customer Penetration, Platform Funding, Partner Channel Strength

High / Low

Prowess
Capabilities across HIA Stack – Intelligent Virtual Agent, Business Model, Market Visibility, Pricing and Deployment Model

High

Companies shown: Verloop, Nividous, Electroneek, User.com, ServiceNow, Verint, Druid, Sainapse, Netcall, Krista Software, EdgeVerve, Appian, Kofax, Nintex*, Aivo, Haptik, IBM, [24]7.ai, Five9, Avaamo, Cognigy, SAP, Yellow.ai, Pega, Salesforce, Genesys, Omilia, Laiye, NICE, Microsoft, Uniphore (Jacada), Kore.ai, Amelia

*Zinnov ran the Request for Information (RFI) process with participating companies between Jan-Apr 2022 and a variety of inputs on both prowess and scale were collected to assess the positioning. In cases where companies could not respond to RFIs in the stipulated timeframe, Zinnov team ensured to conduct the briefing calls & products demos to collect the inputs. In parallel, Zinnov also ran an extensive research exercise with global enterprise customers (100+), leading service providers (20+), developers (500+), domain experts and publicly available data to collect the required information for rating the companies that have participated in Zinnov Zones – H1 2022 and companies that did not participate formally in the evaluation

Note:- Acquisitions up till March 18, 2022 have been considered
Note*:- Nintex has acquired Kryon Systems

Zinnov Zones Hyper Intelligent Automation: Amelia Peer Assessment

- Native Intelligent automation embedded with strategic orchestration, connecting front-end conversational AI capabilities with back-end orchestration
- Continuous focus on product innovation - Developed Digital Employee Builder for no-code Conversational AI for Citizen Developer, Launched Agent collaboration platform with Amelia 'learning engine'
- Has native voice capabilities, however, needs to pay more focus on advance capabilities such as speech analytics. Currently, relies more on third-party integrations for voice biometrics

- Offers both On-premise and Cloud deployment options to enterprise customers
- Launched Digitalworkforce.ai, a Cloud-sourced pre-trained marketplace for digital employees catalyzing creation of hybrid workplace for businesses
- Good coverage across Third-party integrations with players like Salesforce, SAP, Microsoft, ServiceNow, Zendesk and more
- While Amelia's Designer can read and write back to other NLP solutions to improve their performance, it currently does not leverage the platforms like Google Dialogflow, IBM Watson, Amazon Lex natively

- Amelia City, an AI laboratory and Amelia Marketplace – the off-the-shelf AI solutions for holistic intelligent automation and management solution
- Strong coverage across Implementation Partner ecosystem with players like AWS, Accenture, Microsoft, Google, Capgemini etc.
- Platform has been extensively implemented by several clients across diverse range of industries and enterprise size
- Per customer feedback, Amelia needs to accelerate focus on improving customer onboarding process, enabling them to understand platform capabilities better
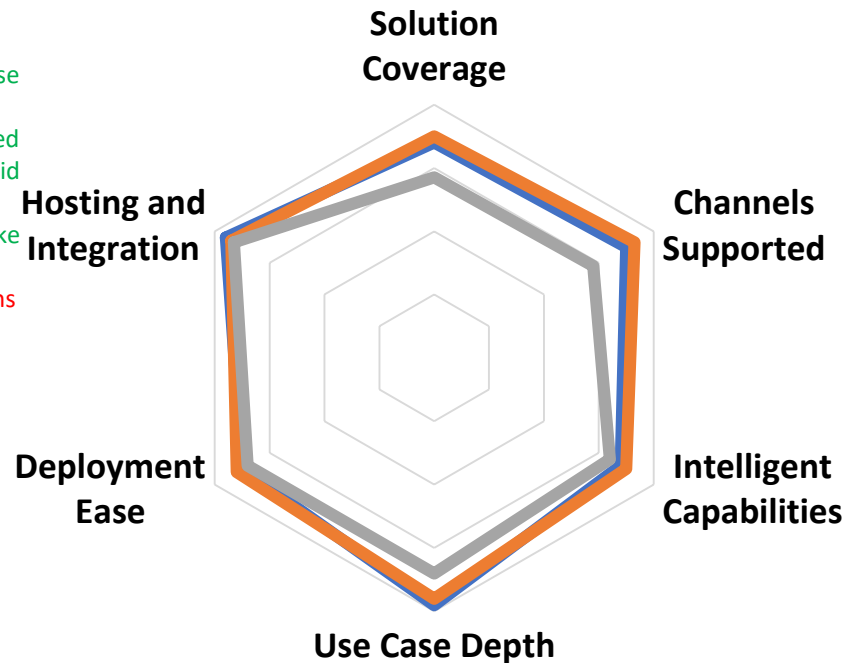
- An integrated platform having strong coverage across all channels such as IVR, Voice Assistants, SMS, Email, Enterprise Messenger, Social Messenger, mobile apps, etc.
- Offers Digital voice-based solutions to customer service agents (CSA) in call centres

- Robust capabilities in intent recognition, contextual understanding and sentiment analysis by use of AI and NLP
- Platform equipped to offers static and dynamic responses
- Observability and AIOps deals well with dynamic environments
- High capabilities with AI-based voice conversational intelligence, speech recognition and text-to-speech capabilities
- Ability to reply with actionable/interactive responses and recall context from previous conversations
- Need to augment Agent Assist Capabilities

- Strong coverage in horizontal (Customer service, HR services, IT services) and industry-specific use cases such as Banking, Insurance, Healthcare, Telecom and so on
- Extending focus to other industry verticals where it has minimal presence such as Manufacturing, and Retail & CPG

Chart axes: Solution Coverage, Channels Supported, Intelligent Capabilities, Use Case Depth, Deployment Ease, Hosting and Integration

Legend:
- AMELIA
- Other Leaders[1]
- Industry Benchmark[2]

Highlights   Lowlights

Amelia Use Case Coverage across Top Industry Verticals

HEALTHCARE & LIFE SCIENCES	BANKING & FINANCIAL SERVICES	INSURANCE	RETAIL & CPG
Network & Care Management	Cards & Payments	Customer Support, Servicing & Policy Administration	Manufacturing & Distribution
Information Technology	Information Technology	Claims Management	Customer Service
Manufacturing	Human Resources	Contact Center Underwriting/Pricing	Sales & Marketing
Policy Servicing & Management	Client Service	Product Development & Management	Product Development
Clinical Development	Sales & Marketing	Sales & Marketing	Supply Chain and Logistics
Human Resources	Treasury & Debt Instruments		
Product, Risk and Underwriting	Asset & Wealth Management		
Claims Management	Mortgages		
Sales & Marketing	Tax & Audit Consulting		
Drug Discovery	Client Onboarding		
Supply Chain			
Finance and Accounting			

Amelia Use Case Coverage

www.zinnov.com

CALIFORNIA | TEXAS | PARIS | BANGALORE | GURGAON

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