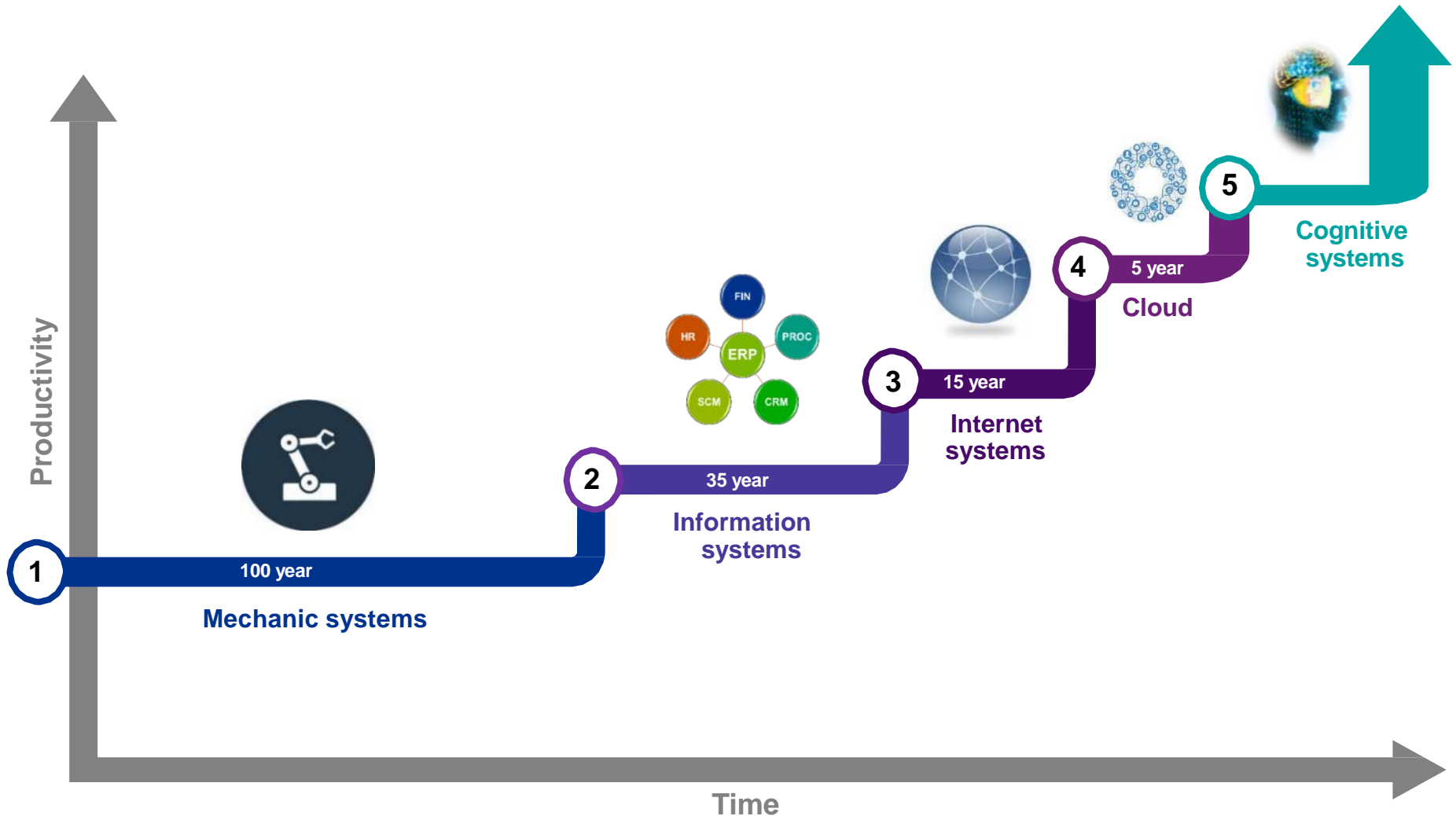




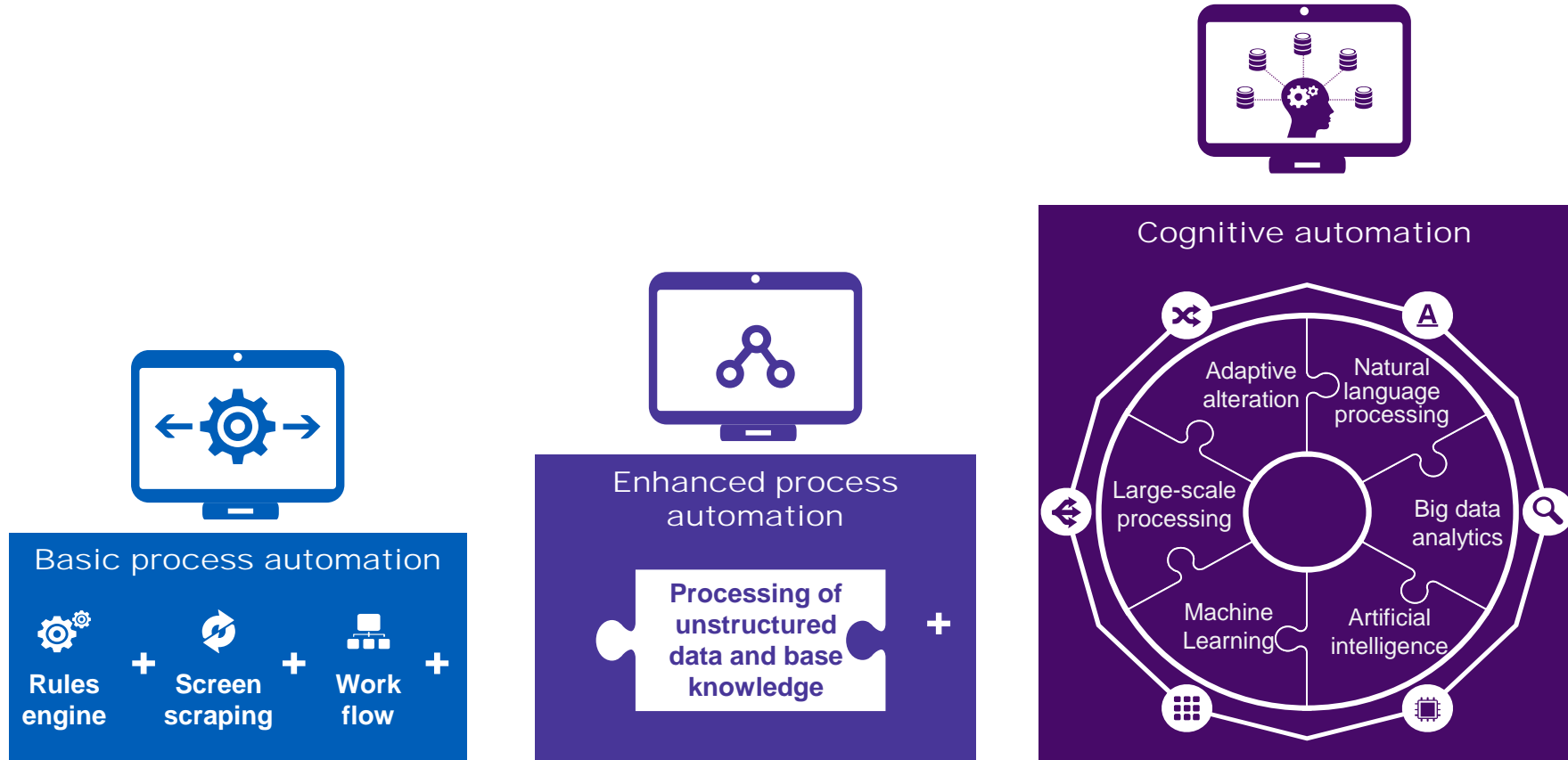
# Digital labour revolution



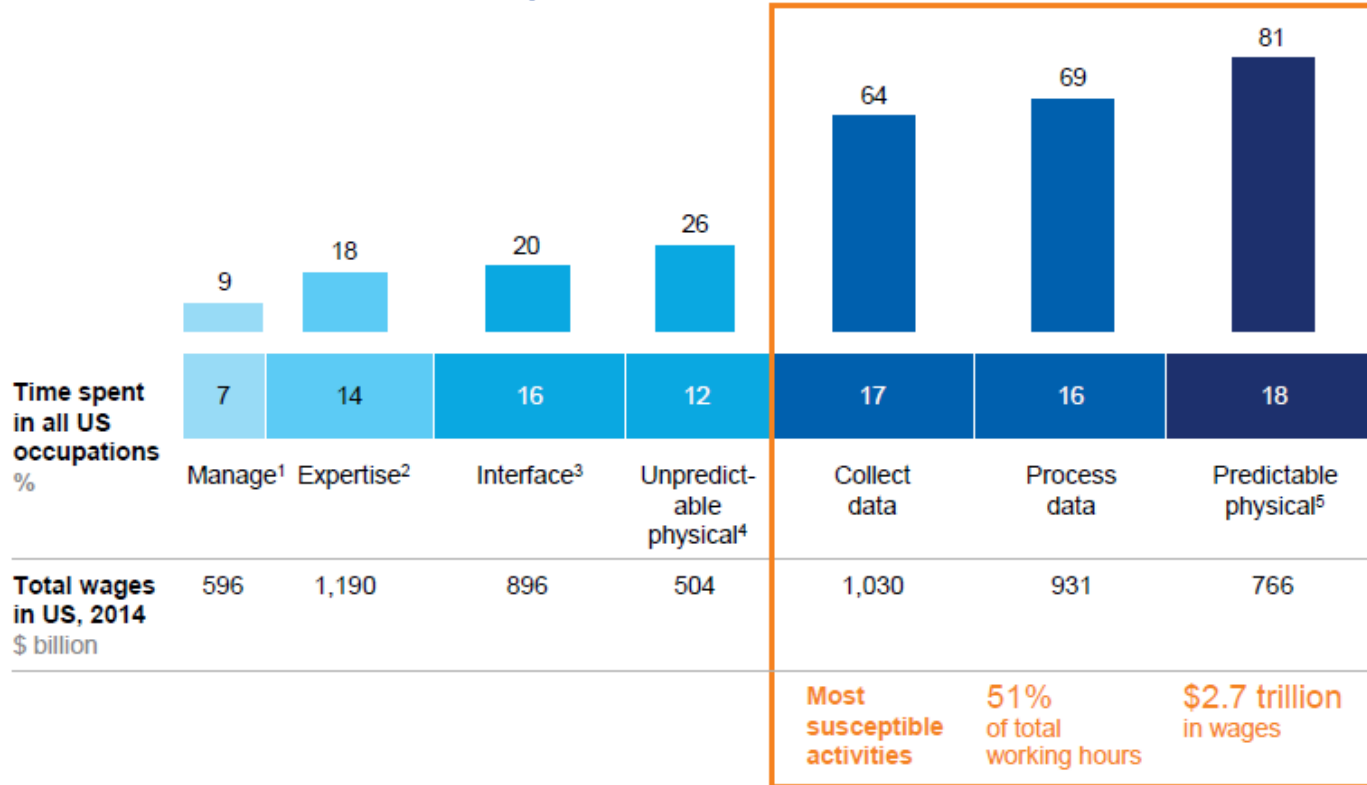
# Cognitive automation will enable next wave of automation



# Basic process automation is today's main focus. We expect a shift towards cognitive automation in the coming years



# Significant percentage of activities can be automated by adapting currently available technologies



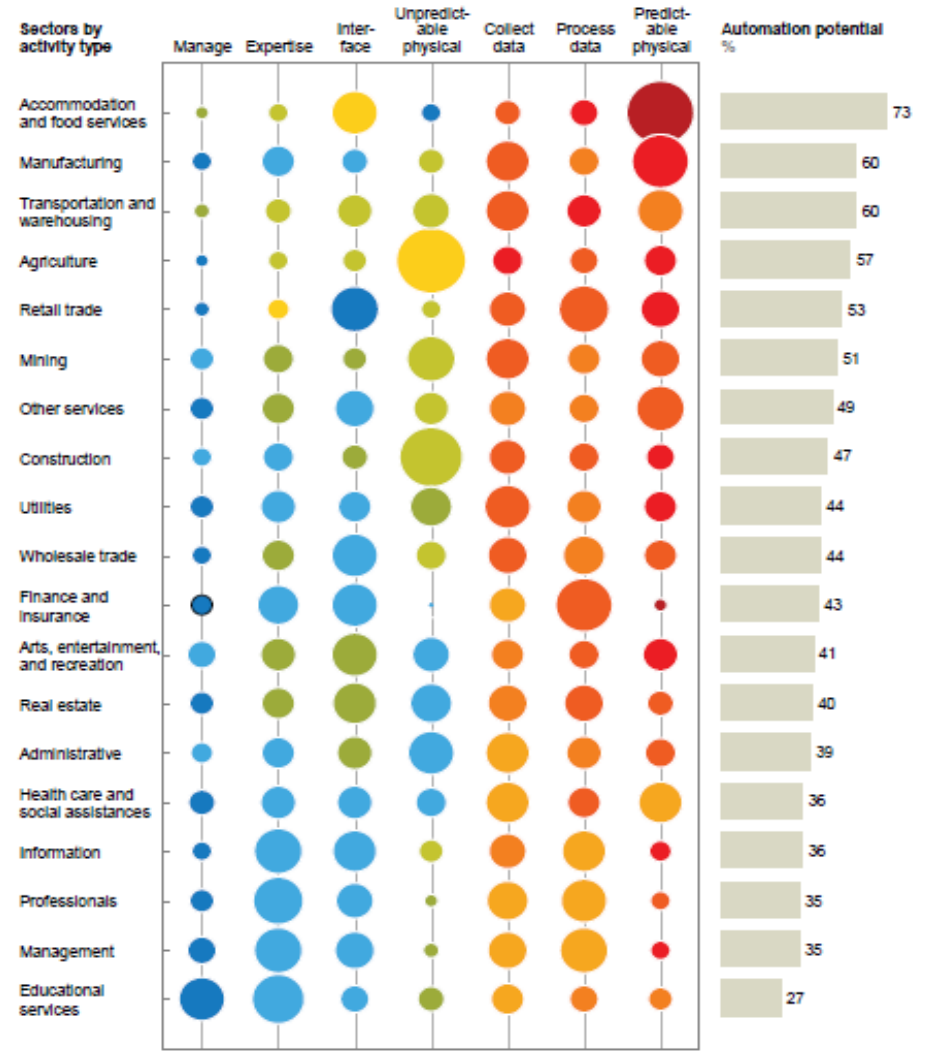
- 1 Managing and developing people.
- 2 Applying expertise to decision making, planning, and creative tasks.
- 3 Interfacing with stakeholders.
- 4 Performing physical activities and operating machinery in unpredictable environments.
- 5 Performing physical activities and operating machinery in predictable environments.

NOTE: Numbers may not sum due to rounding.

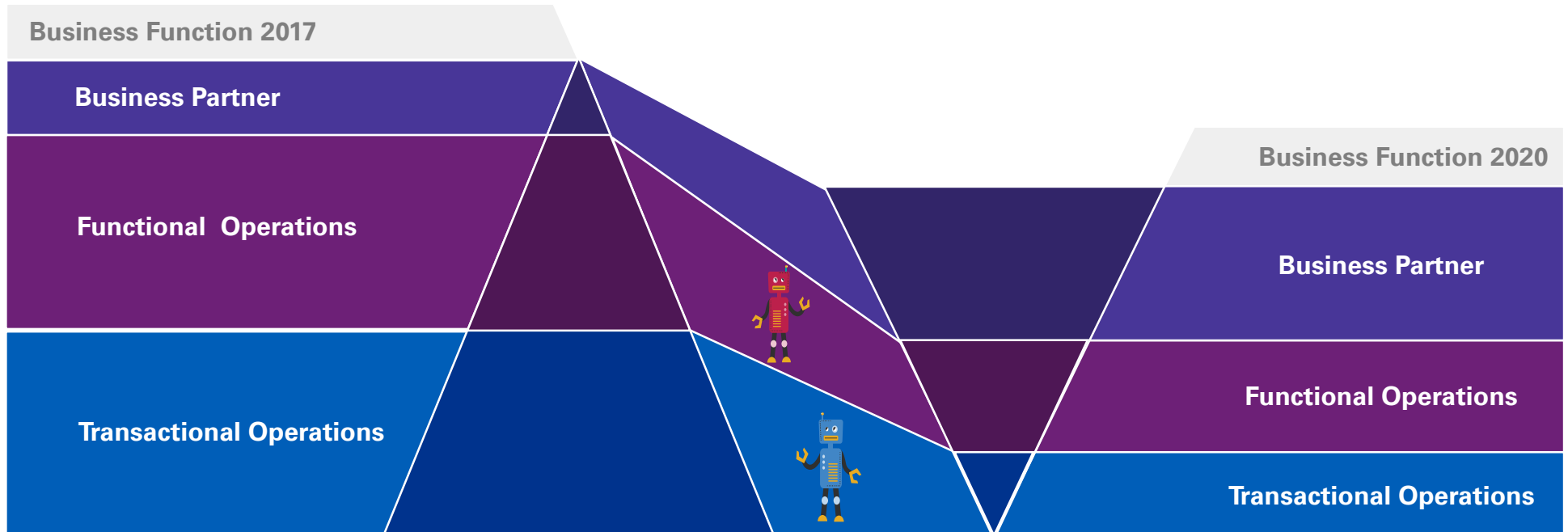
SOURCE: US Bureau of Labor Statistics; McKinsey Global Institute analysis

# The degree of automation potential varies considerably among sectors

- Essentially all occupations, whether high skill or low skill, have some technical automation potential
- Current top-three is characterised by high levels of predictable physical automation potential
- Service industry is characterised by high potential in interfacing with stakeholders, and collecting and processing data
- Factors affecting pace and extent of automation:
  - Technical feasibility
  - Cost of developing and deploying solutions
  - Labor market dynamics
  - Economic benefits



# Shifting human workforce to value-adding activities

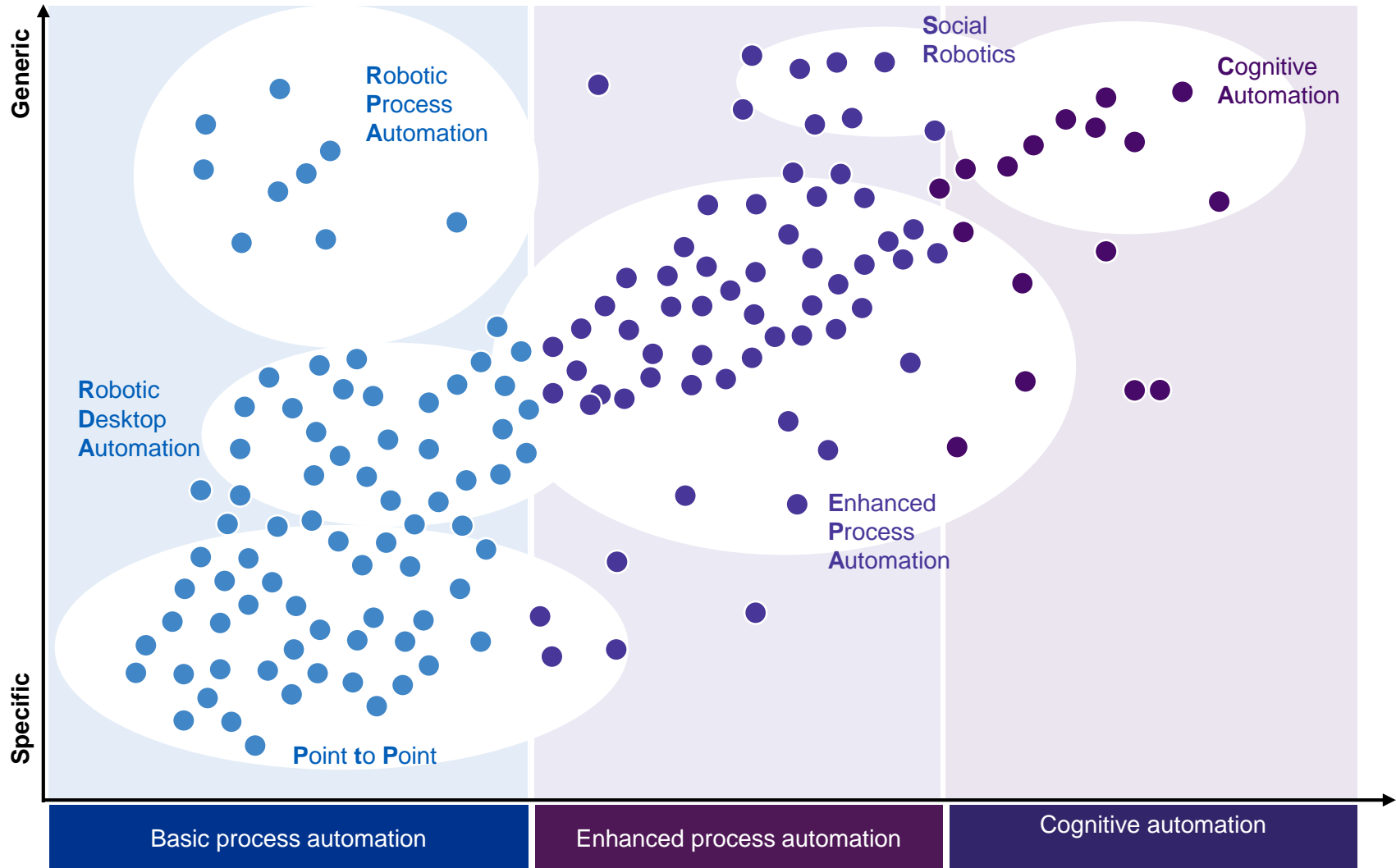


**Cognitive Robotics**

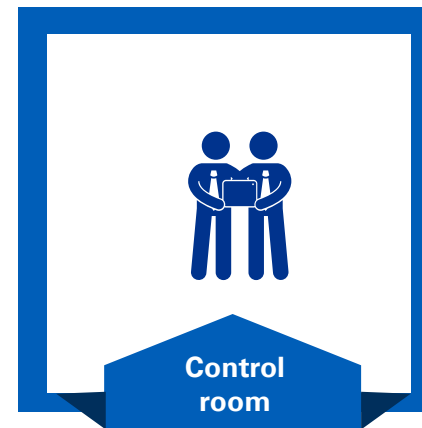
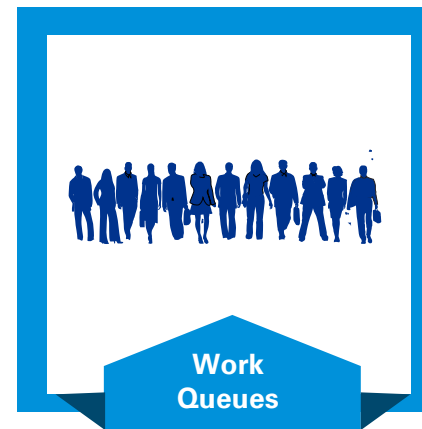


**Process Robotics**

# There is no such thing as 'one' robotics

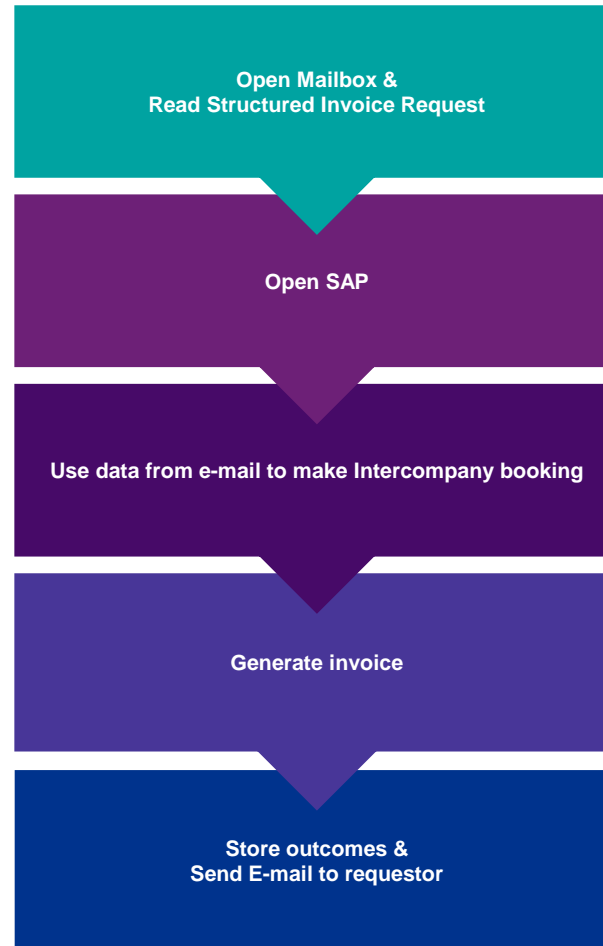


# Process Robotics key ingredients





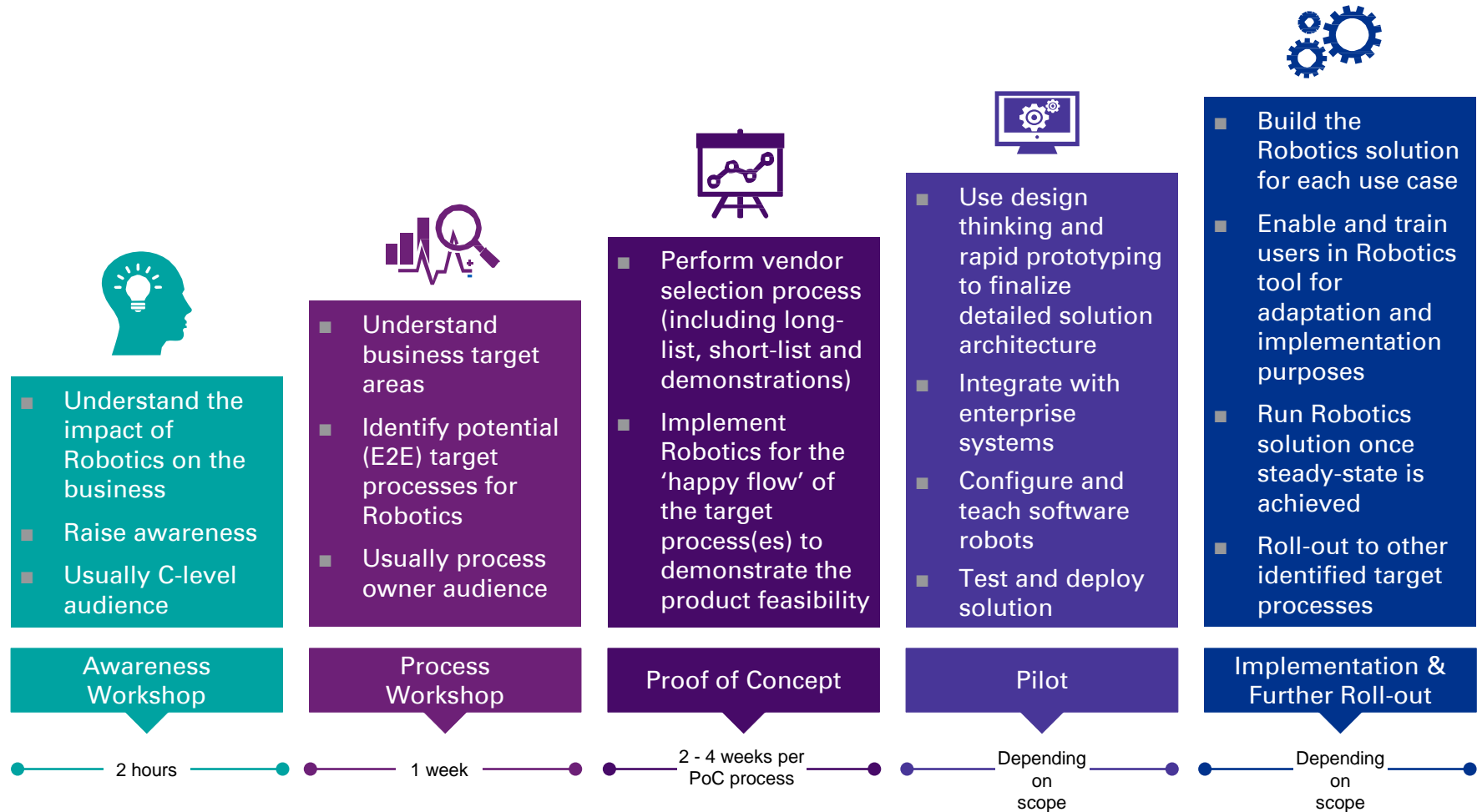
# Demo process example



# Robotics can bring a variety of substantial benefits to our clients



# A typical Process Robotics journey



# Lessons learned from project implementations

Our findings from previous Robotics project implementations can be clustered into five themes:

- 01 Robotics implementation is not an IT project
- 02 Detailed working instructions are needed
- 03 After cost savings, quality improvement is a key advantage of implementing Robotics
- 04 Support functions like IT, HR and Risk must be involved with the Robotics Implementation
- 05 Change management is a critical success factor



How tangible is  
robotics for your  
organisation?

