

# Five Characteristics of Successful Midmarket Automation Programs



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## Best Practices to Get Your Automation Project Off the Ground and Humming

The IDC report *The State of Process Automation in the Midmarket in 2024* found that ...



... midsize organizations that are **consistently successful with process automation are more than twice as likely to see an increased budget** than those that are unsuccessful.

Read on to understand the characteristics and benefits of successful automation programs and learn how to plan and fund a new program or improve an existing one.

1

### Success Is Built on Automation Planning

Successful teams use automation planning tools to document processes and identify, understand, and quantify automation opportunities.

Successful automation programs use:

54%

Process mining

48%

Mapping and monitoring tools

42%

Metrics and monitoring tools

2

### Automation Is Tied to Improved Financial Performance

Because automation leads to greater efficiency and productivity, project sponsors expect to see improved key performance indicators and financial performance.



**58%** of respondents view this as a **top priority and concern**.

**41%** of the successful programs tie **projects to financial performance**.

**ONLY 27%** of the challenged programs can tie **project outcomes to financial performance**.

3

### Citizen Developers Bring Capacity and Expertise

Successful citizen developer projects provide added capacity and business expertise to automation projects and turn into a competitive advantage.



48%

of midmarket organizations **operate citizen developer programs**

53%

of citizen developers in **successful programs were promoted**

57%

received a **pay increase**

4

### Automation Projects Target the Right Departments and Goals

Finance, sales and marketing, and customer service are the top business process improvement priorities in 2024.

**44%** of the midmarket already began **investing in generative AI (GenAI) in 2023**, and it is a **top priority in 2024**.

Most automation projects are focused on **quality and efficiency**, while...

**44%** of GenAI adopters plan to focus on **personal productivity**.



**Automation planning, metrics, and monitoring** are of major concern for organizations successful in automation as they help tie the **outcomes of automation projects to tangible business value**.

5

### Automation Success Leads to a Larger Automation Budget

Based on survey responses, midmarket organizations are rewarded for initial automation success by establishing more formal automation programs.

Midmarket organizations

55%

operate a dedicated business process management team

Midmarket organizations

43%

run formal automation programs

Active and healthy citizen developer programs

55%

operate in the IT COE

This group is critical for process automation planning.

The most successful programs are housed in a center of excellence (COE).

Running a successful citizen developer program is key to consistent success in automation, leading to increased automation budgets.

Source: IDC's *The State of Process Automation in the Midmarket in 2024*, November 2023

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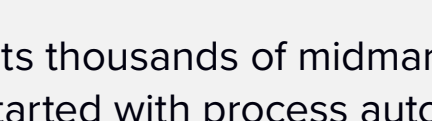
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Read the full IDC report, sponsored by Nintex:  
*The State of Process Automation in the Midmarket in 2024*