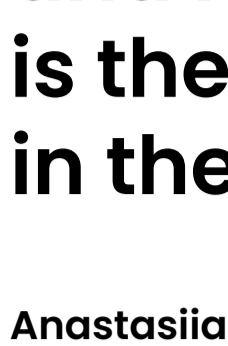


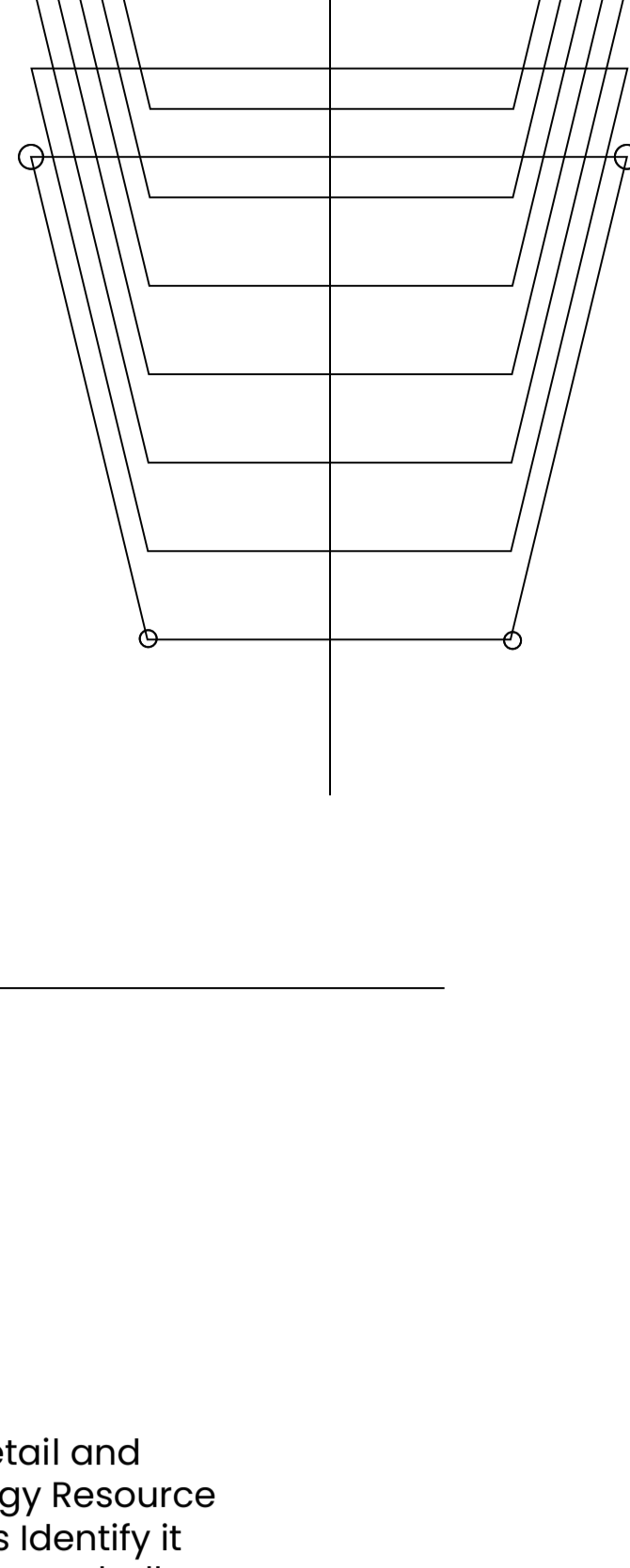
Infusing intelligence and predictability with digital process twins

HFS Research sponsored by IBM and Celonis
May 2023



Supply chain disruption and material availability is the biggest challenge in the market.

Anastasiia Glebova, Global process mining leader, Kone Cranes



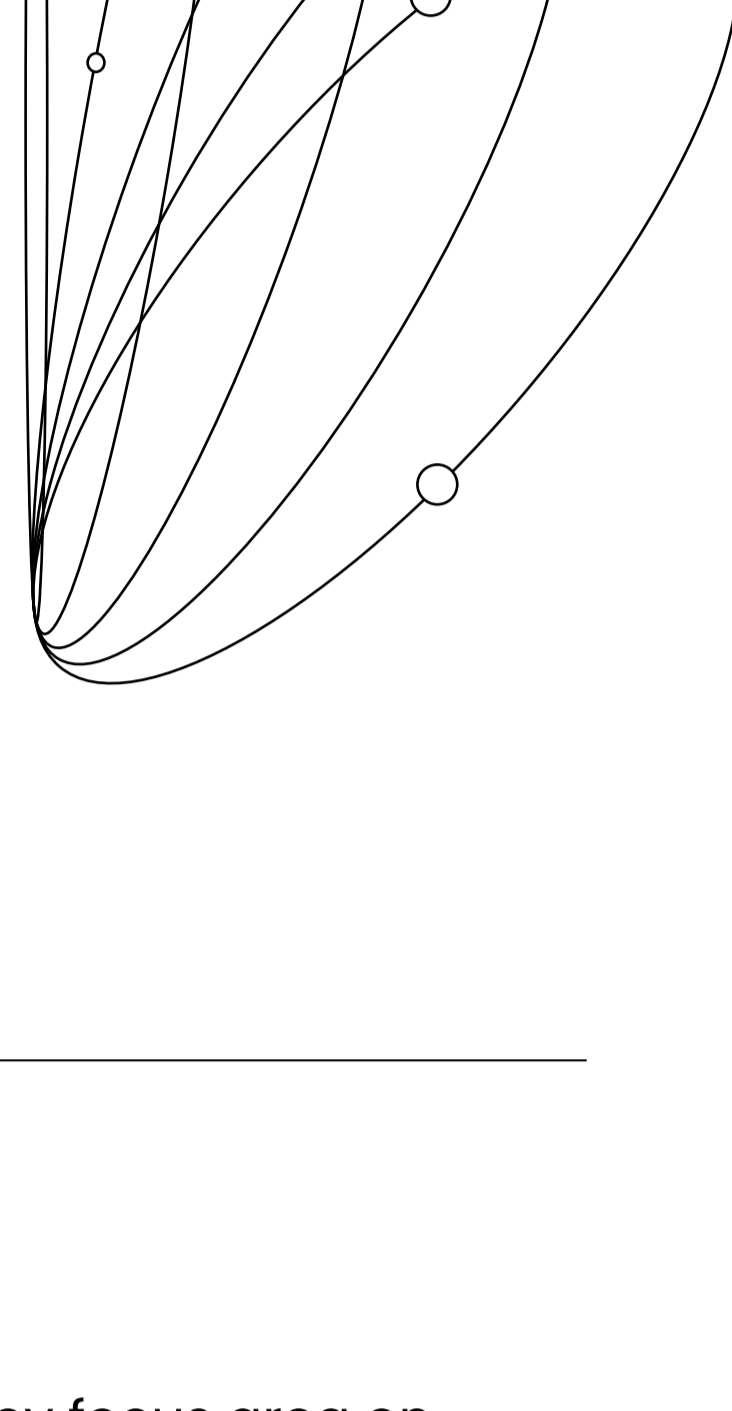
High volatility in the market and supply chain disruption are high impact Opportunity

84% of Retail and Energy Resource firms identify it as a top challenge



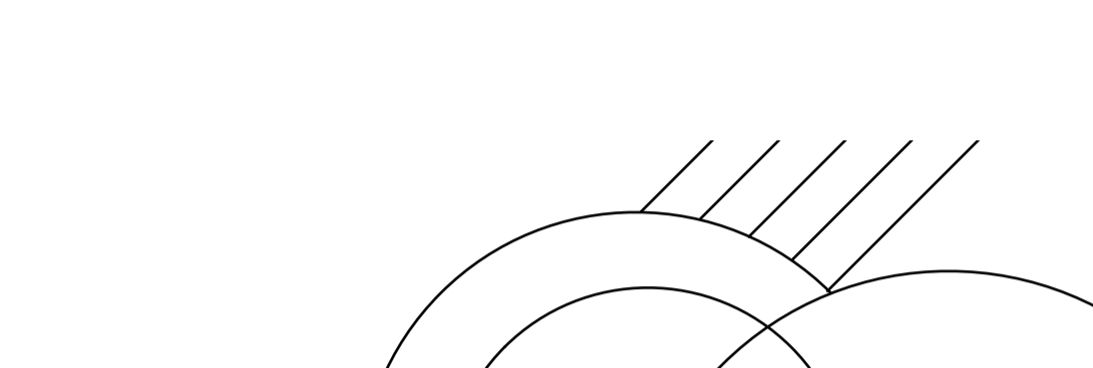
We have decided to do process mining to help in end-to-end process development and to support the on-time delivery improvement.

Anastasiia Glebova, Global process mining leader, Kone Cranes

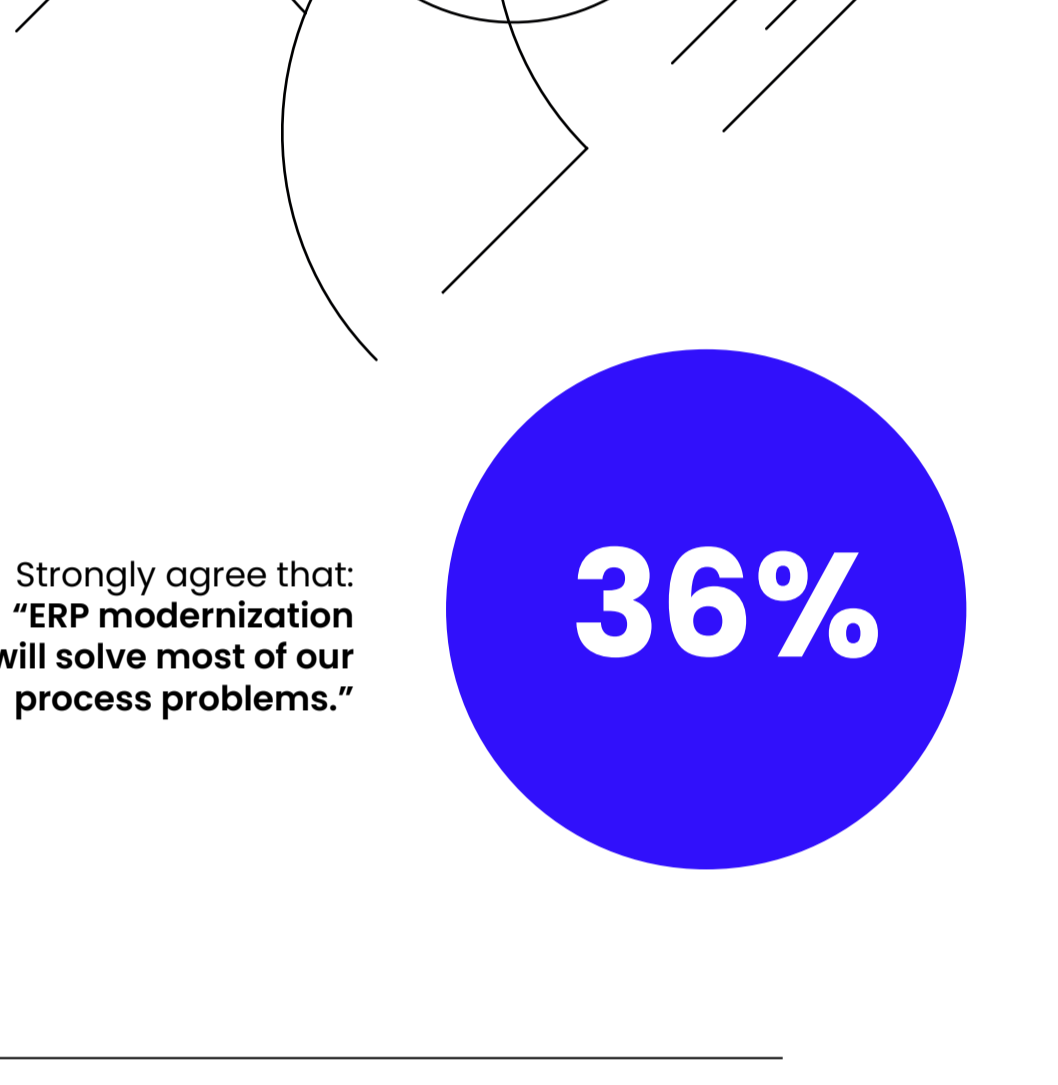


Biggest benefits sought through the execution of process transformation initiatives in the last 12 months

51% Key focus area on Operating cost reduction
48% on retail, energy and firms experiencing de-growth
52%



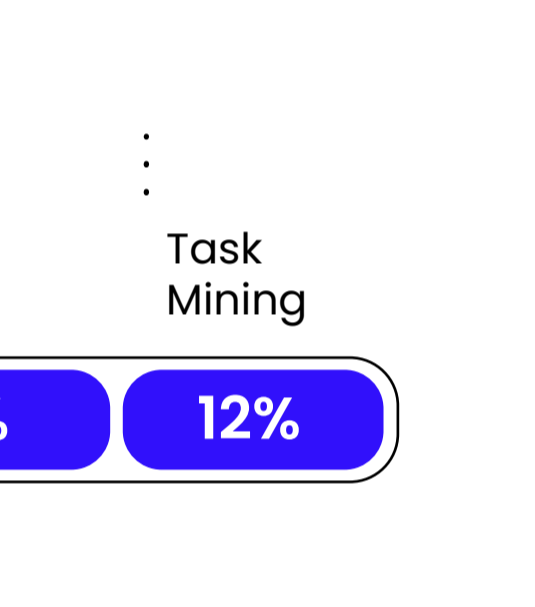
ERP isn't a silver bullet, and process debt is a **recognized challenge**; process intelligence has quickly become the **#1 way for enterprises to address the chasm**



Strongly agree that: "Process debt is almost nonexistent in our organization."



Strongly agree that: "ERP modernization will solve most of our process problems."



What is the primary way that **process debt** is being addressed in your organization?

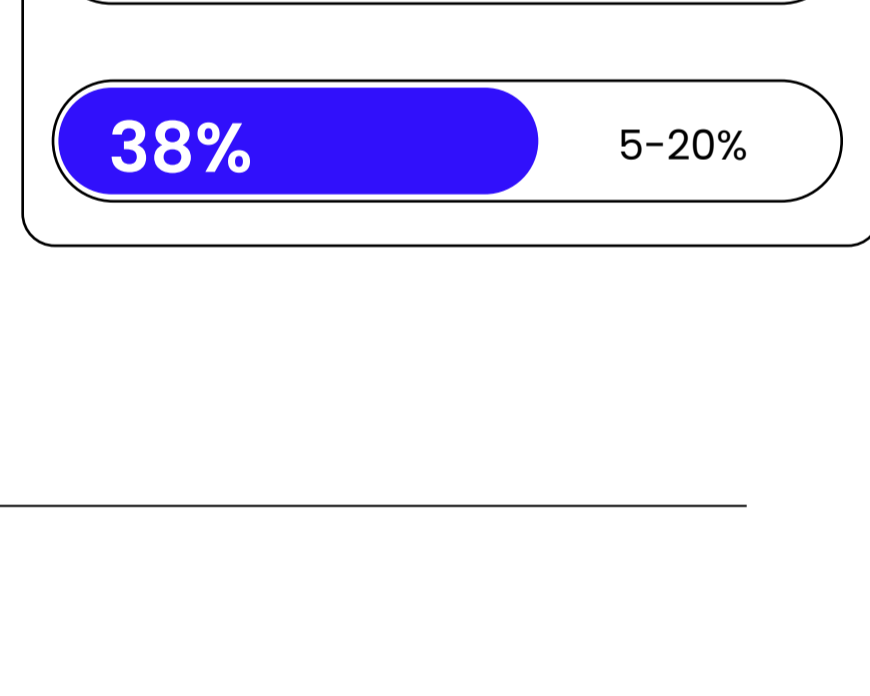
Process Mining: **29%** Task Mining: **12%**

41% Process mining Intelligence

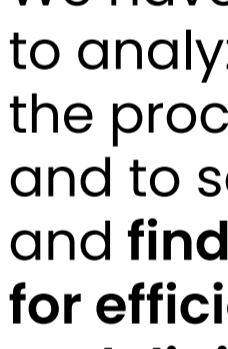


88% Of enterprise leaders expect increases in process intelligence investments

Exponential increase in process intelligence investments



What are their plans for process transformation efforts in the next 12-18 months?

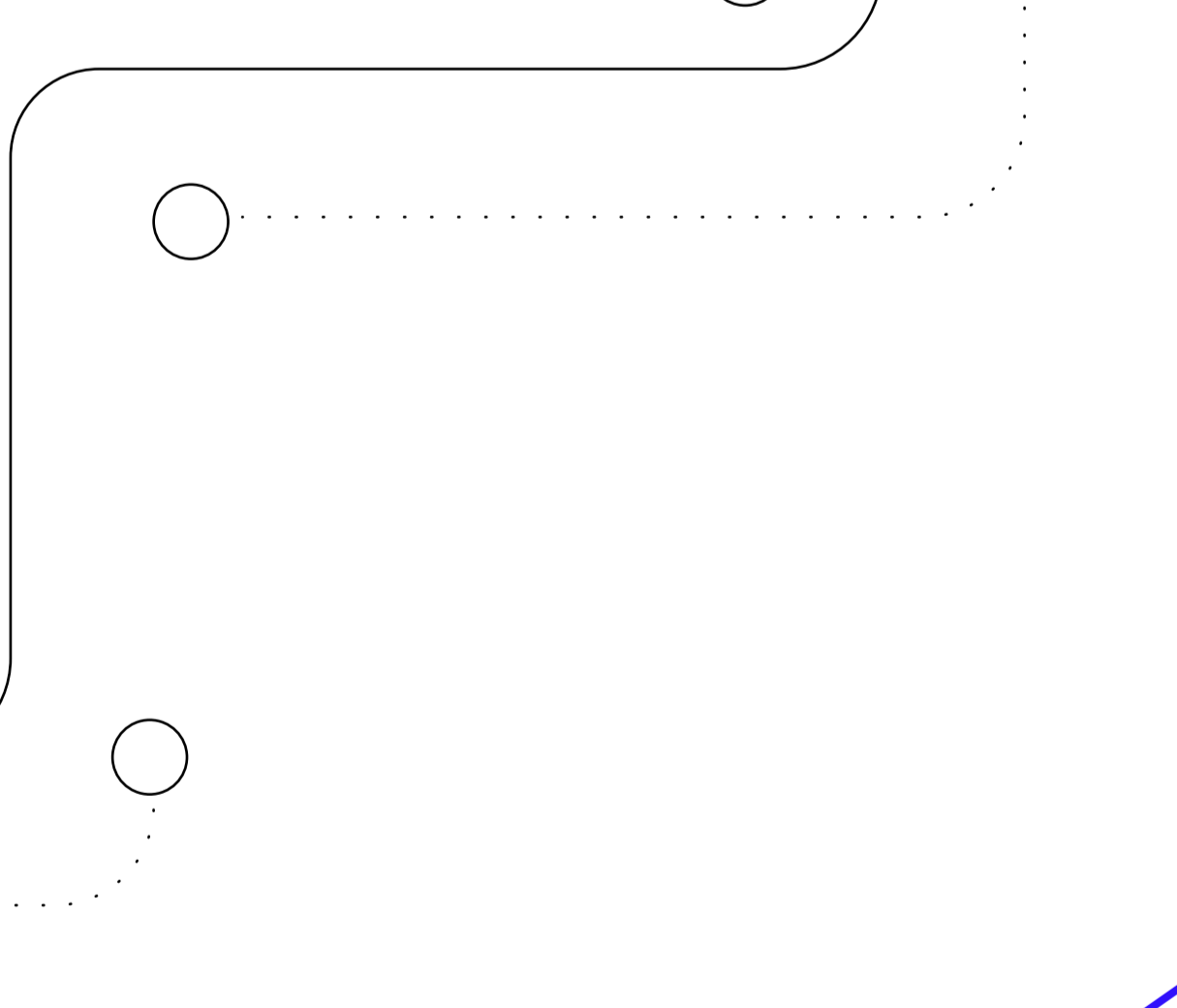


We have a goal to analyze and monitor the processes and to search and find **enhancements for efficiency, automation, and digitization of processes.**

I think the solution by our process intelligence vendor is innovative in the correct way.

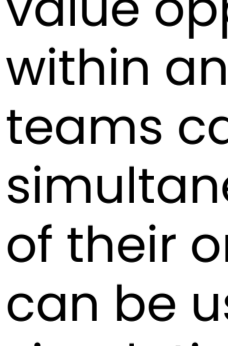
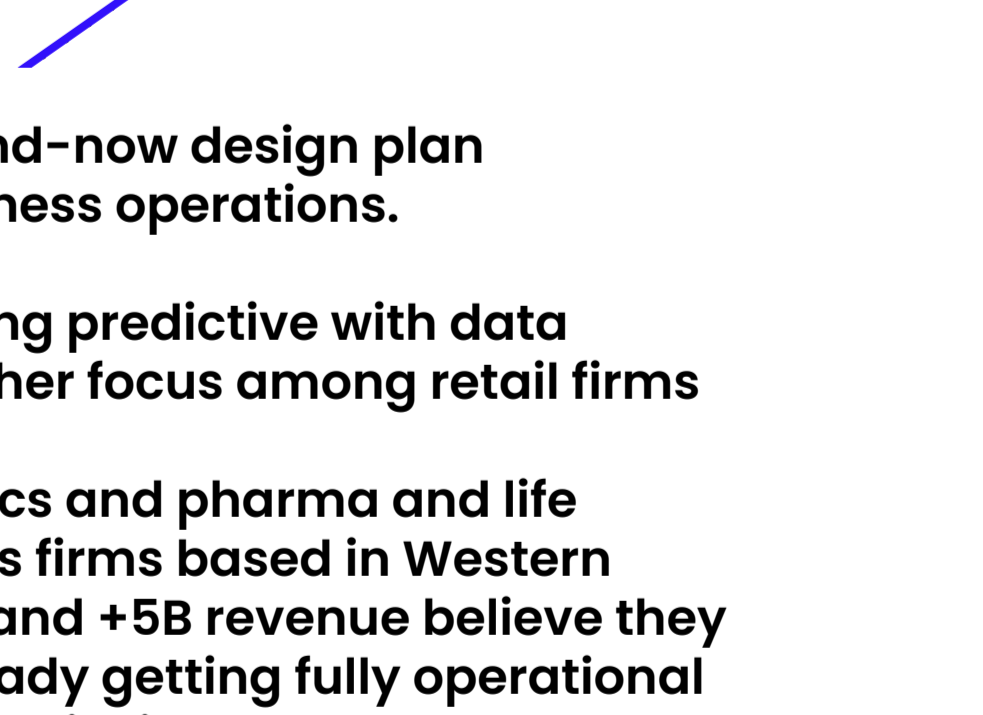
Process intelligence leader, retail industry

95%+ of Organization leaders see: **Combining visibility into crossfunctional operational performance and monitoring as a Game changer**



48% of enterprise leaders are still exploring ways to become more predictive with their data

- Here-and-now design plan for business operations.
- Becoming predictive with data is of higher focus among retail firms
- + logistics and pharma and life Sciences firms based in Western Europe are already getting fully operational predictive insights.



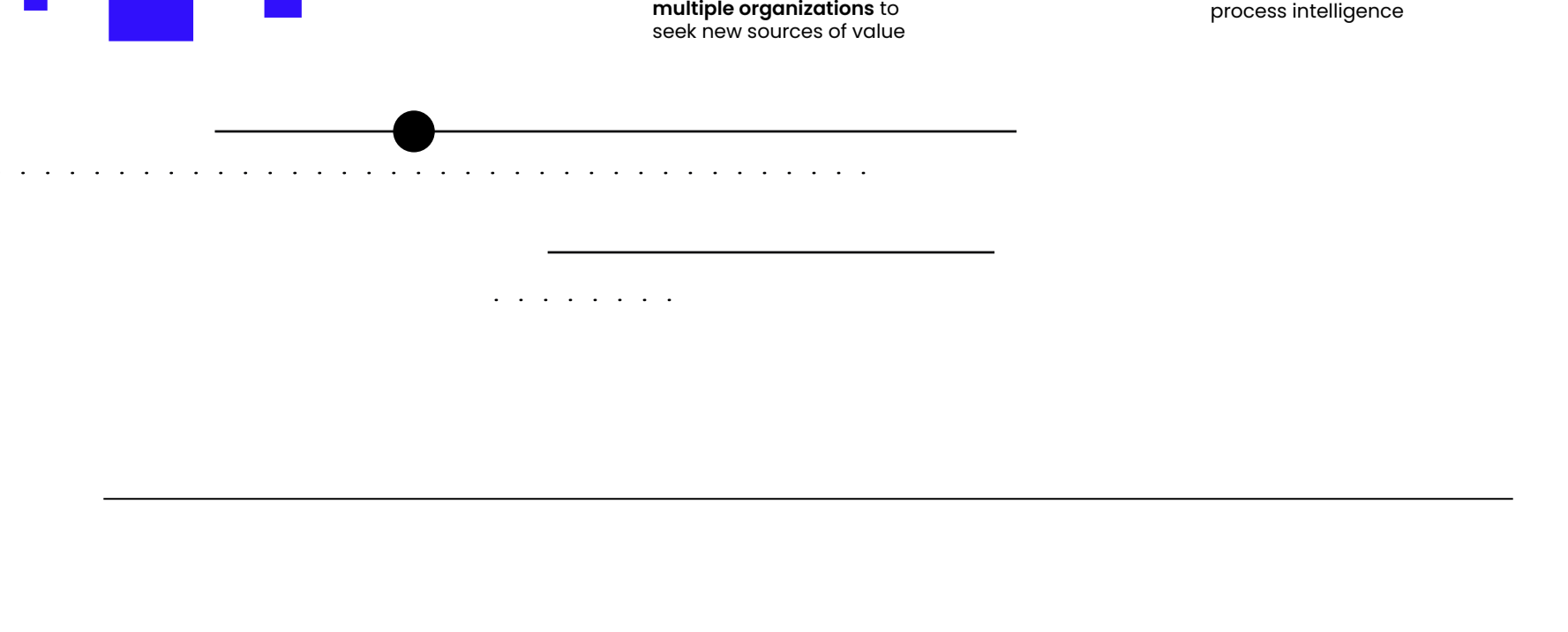
Process mining provides unparalleled visibility into how a business runs, uncovering value opportunities hidden by complexity within and across processes. With Celonis, teams can analyze multiple processes simultaneously and create a digital twin of their organization. These digital twins can be used to enable quick wins, advanced simulation, and expert decision-making.

Wil van der Aalst, Chief Scientist, Celonis



Connected digital process twins are on the horizon

Have high expectations (rated 4 or 5) of



HFS Research in partnership with IBM and Celonis, reached out to 260 enterprise leaders (including GBS leaders, shared services heads, and CXOs) spanning various geographies, industries, company sizes, and other demographics across goods-producing industries.