UiPath
Agentic automation

In collaboration with
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Enterprise-wide transformation: Boosting productivity with agentic automation

Authored by:
Peyman Saatian, Lilia Christofi, Callum Jones, Mariia Lakhonina
PwC

Julien Hissler, Emily Pham
UiPath

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What is the challenge?

In recent years, there has been a significant drive among global banks to enhance productivity. This push is driven by the need to remain competitive in a rapidly evolving financial landscape, where efficiency and innovation are paramount. According to PwC's CEO Survey, CEOs across various industries, including banking, are prioritising digital transformation to drive growth and improve efficiency. This trend underscores the importance of leveraging advanced technologies, such as AI and automation, to achieve substantial productivity gains and operational efficiency.

Sectors with high AI exposure, such as professional services and financial services, are witnessing labour productivity growth up to 4.8 times greater than those with lower AI exposure. This underscores the significant potential of AI to enhance operational efficiency, which is crucial for achieving enterprise-wide transformation (see PwC AI Barometer).

It is evident that technology and automation are crucial for effective operations, but nearly half of operations leaders (47%) say using them effectively is a significant challenge to achieving their priorities. Investments in new technology can help address problems at the heart of operations, including speed, accuracy, and innovation. However, COOs recognise potential issues with implementation, citing competing technology platforms and lack of employee adoption as other challenges to achieving their priorities (see PwC's Pulse Survey).

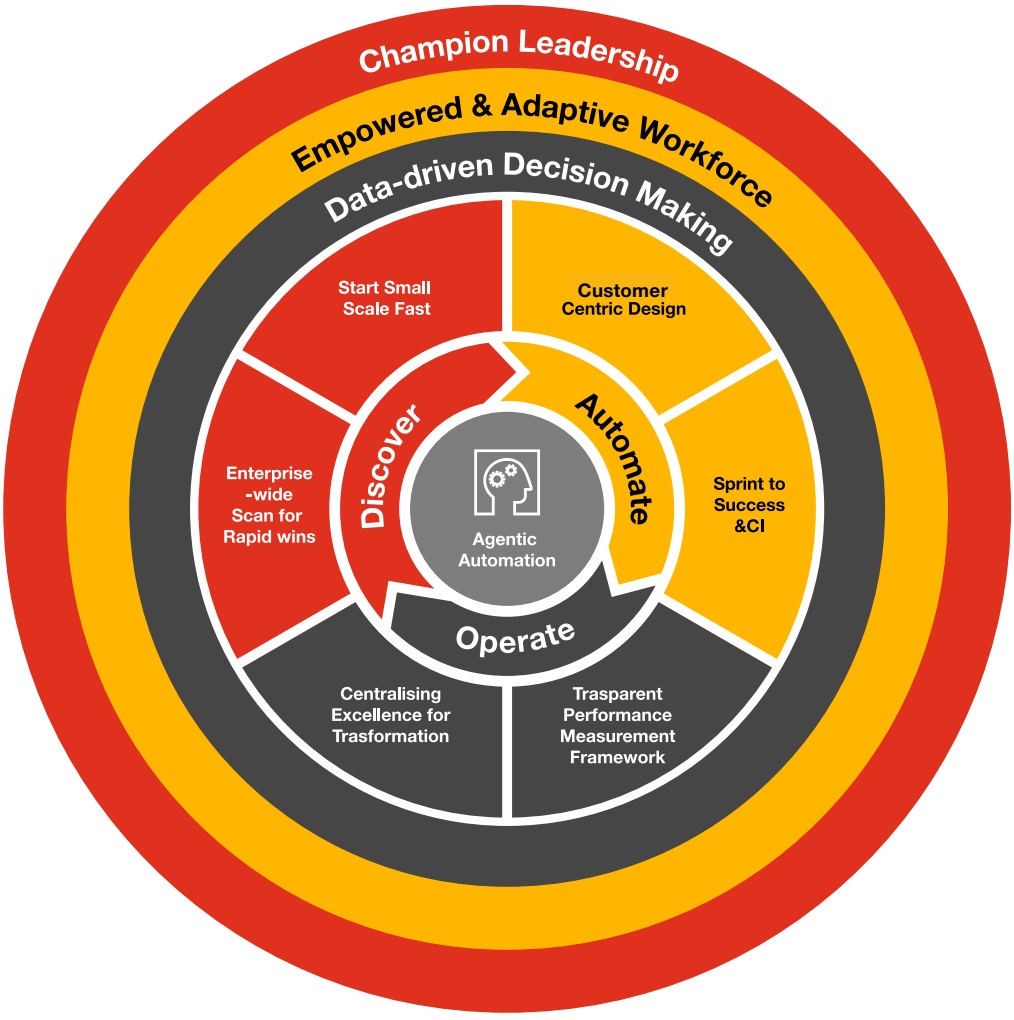
The advent of agentic automation provides an opportunity to maximise productivity and achieve a step change in operational efficiency. Agentic automation moves automation to a new level of autonomy by harnessing the power of GenAI and large language models (LLMs) to give agents the capabilities to make sense of the unstructured data, recognise patterns, plan and delegate actions, and make decisions on their own. Agentic automation does this by deploying always-on agents - with knowledge of available tools, models, and integrations - enabling the automation of the most complex, open-ended enterprise processes.

However, proactive intervention is essential to successfully implement and realise the full potential of agentic automation. It requires tackling inaccurate data models, unclear productivity definitions, and the inherent tendency of business functions to inflate costs and complexity over time.

Factors such as visionary leadership, robust operational structure, good management practices, and the use of technology can increase productivity. However, these have been applied in a disjointed manner over the past decade, leading to underwhelming, short-lived results. Traditional approaches like cutting costs and outsourcing business operations have only delivered temporary improvements and efficiency gains were not sustainable.

A coordinated, universal strategy linking leadership development, ways of working, and digitisation, supported by data insight, is necessary. This, coupled with accelerated, cost-effective digitisation that addresses client problems, will help businesses implement agentic automation and realise its benefits. We call the sum of these proactive interventions, enterprise-wide transformation. When coupled with agentic automation, this holistic approach can integrate multiple factors to drive sustainable improvement, ensuring that technology and automation are used effectively to enhance operations and deliver long-term strategic benefits.

Enterprise-wide transformation: core principles



Delivering enterprise-wide transformation

Enterprise-wide transformation follows a proven, standardised process, supported by a set of core principles:

1: Champion leadership

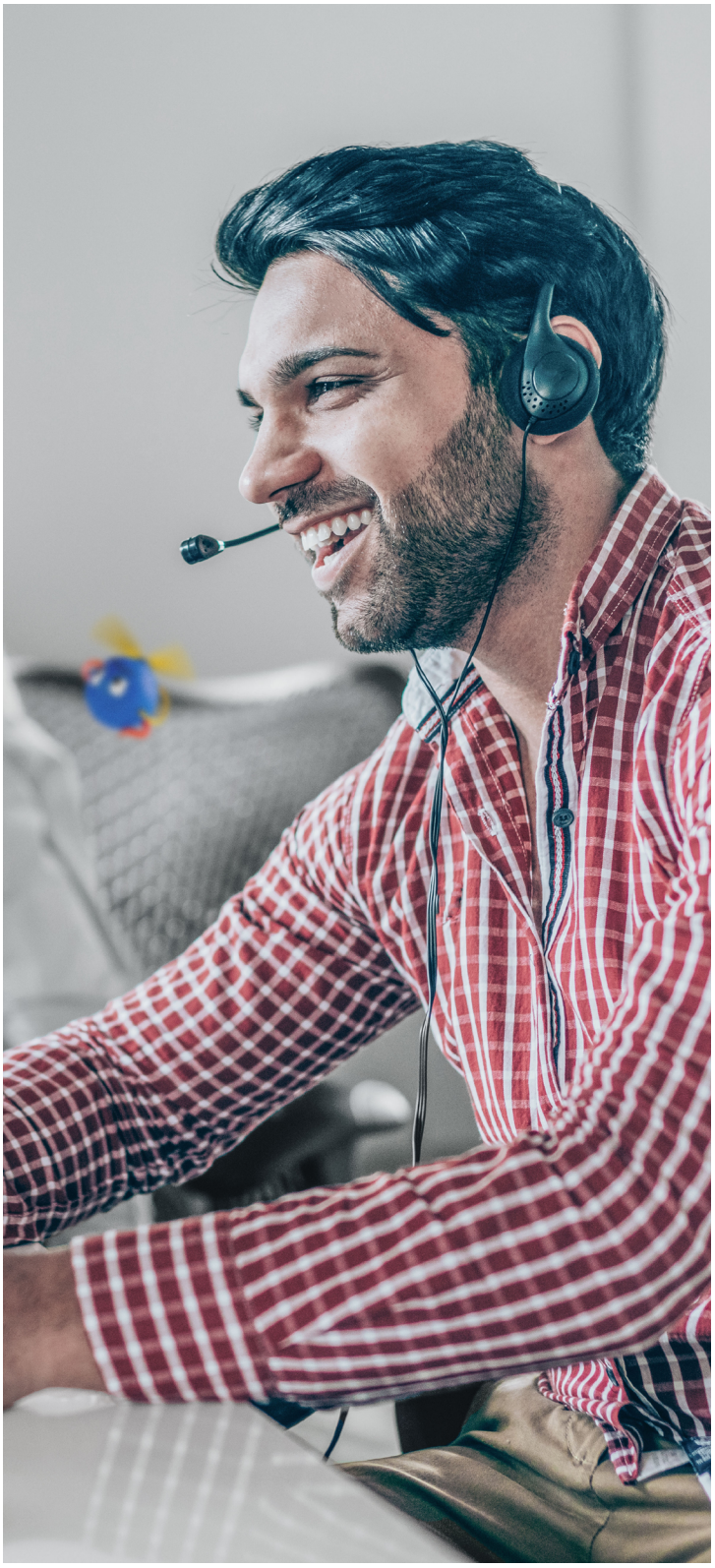
Operations leaders are becoming integral to business strategies, necessitating a profound understanding of technology, risk, and regulatory environments. To drive transformation at an enterprise level, these leaders utilise essential tools such as executive sponsorship, objective setting, and balanced scorecards. Top-down executive sponsorship at the highest level is particularly critical for the success of operational transformation, as it provides clear direction, essential resources, and advocacy for the project both within and beyond the organisation. CEOs play a pivotal role by setting a shared vision and empowering their teams to make decisions that drive significant changes in business direction.

In the evolving business landscape, COOs are increasingly focusing on leveraging AI to streamline processes, enhance productivity, predict potential issues, and make more informed decisions. This shift underscores the growing importance of technology in the role of operations leaders. By integrating AI, COOs can simplify complex processes and enhance decision-making capabilities, which are essential for maintaining a competitive edge in today's market. An agentic framework adds a powerful new dimension to these efforts, enabling operations leaders to deploy intelligent, autonomous and self-healing agents that can make informed decisions with minimal human intervention. The emphasis on technology not only enhances operational efficiency but also supports the broader strategic goals of the organisation.

However, this transformation does not come without its own investment. Designing and implementing agentic systems is resource-intensive and requires advanced expertise. Leaders must consider that simply swapping traditional full-time equivalents for roles requiring higher skills—often at greater costs—without accounting for the broader strategic impact can undermine these initiatives. A holistic approach, coupled with top-down sponsorship, ensures these investments deliver sustainable value while aligning with the organisation's vision and competitive priorities.

2: Empowered and adaptive workforce

The UK workforce is navigating a period of intense transformation, with 41% of employees experiencing increased workloads and 37% needing to acquire new tools and technologies to stay effective in their roles, according to the UK Workforce Hopes and Fears Survey, 2024. These shifts underscore the critical need for strong leadership and a well-defined vision to help employees through such transitions. Effective leaders must ensure that employees have the guidance and resources to meet these new demands, equipping them with the necessary skills and tools to accomplish more.



Notably, the UK workforce is optimistic, with 65% excited about emerging opportunities and 74% ready to adapt. Yet, the rapid pace of change brings challenges: 45% feel overwhelmed by the volume of transformation, while 40% remain uncertain about its purpose. This highlights the importance of transparent communication and a solid change management strategy to support employees in this evolving landscape.

For enterprise-wide automation to succeed, collaboration between technology and human expertise is essential. Agentic automation, where systems operate autonomously within set parameters, benefits from involving employees in its development and deployment, ensuring it aligns with the business needs. They advocate for a cultural transformation that fosters trust in automated systems through open communication, continuous feedback, and tailored training. This involves redesigning roles and processes, coupled with experimentation and refinement, during training and implementation. They highlight that tools and new technologies will not be immediately adopted or relied upon without taking employees on the journey, creating a dynamic ecosystem where humans and machines complement each other, driving continuous improvement and holistic organisational evolution.

3: Data-driven decision making

In today's digital landscape, data availability is rarely the problem—yet many leaders are only scratching the surface of what data analytics can truly offer. Effective analysis of large datasets has the potential to drive strategic decision-making, improve operational insights, and boost long-term growth. But for these analytics to truly deliver value, data quality, accessibility, and security must be prioritised. Only then can organisations fully capitalise on agentic automation, where intelligent agents provide deeper, actionable insights and operational efficiencies.

To maximise the benefits of agentic automation, companies must establish robust data foundations, beginning with a focus on data quality, privacy, and centralised data access. This means evaluating current data quality practices and identifying improvements, especially around any bottlenecks that impede smooth operations. By investing in DataOps methodologies and technologies, organisations can streamline data delivery and operationalise data assets. Integrated, cloud-based solutions are particularly advantageous, allowing business data to be stored centrally and accessed across multiple applications quickly and securely. These efforts, when aligned with data governance standards and collaboratively managed with stakeholders, lay the groundwork for a data-driven organisation that can confidently and securely harness the power of agentic automation.

Agentic automation requires agents to have a clear contextual grounding in business processes, ensuring that their outputs are both accurate and relevant. This should be addressed through a 'trust layer' security feature that ensures the AI models and agents accessing business data are in compliance with company policies. This layer offers enterprises confidence in sourcing, accessing, and utilising data, allowing agents to respond to user queries and proactively manage processes with accuracy and integrity. By combining robust data management practices with automation's capacity to process vast amounts of data, organisations can accelerate insights, refine operations, and make informed, data-driven decisions at scale.

4: Enterprise-wide scan for rapid wins

Optimising organisational performance begins with a comprehensive enterprise scan to assess inefficiencies and bottlenecks. Using data analytics tools, organisations can pinpoint areas needing improvement, setting productivity goals that align with broader strategic objectives like cost leadership, operational efficiency, or enhanced customer experience. Establishing clear ambitions and focusing efforts on high-impact areas ensures that improvement initiatives are well-aligned with organisational goals and priorities.

Opportunity triage then breaks down productivity opportunities into critical areas such as people, process, data, and technology. A strong communication strategy fosters a culture of continuous improvement and keeps teams engaged. A structured productivity backlog, categorised by impact and complexity, enables organisations to secure early wins while ensuring sustained improvement over time.

AI-powered tools further support high-ROI opportunities for continuous process optimisation. Insights from process and task mining tools provide an objective, data-driven view of processes and activities, while communications mining can automate and scale business conversations, enhancing employee and customer experiences. A centralised platform helps capture and prioritise productivity opportunities, driving both operational efficiency and value realisation across the organisation. PwC has developed advanced Generative AI-powered tools that extract data from various sources (such as annual reports and financial statements), map it to performance indicators, and recommend high-impact AI use cases to drive strategic value.

5: Start small, scale fast

To jumpstart the pilot, we must focus on low-complexity tasks that deliver mid- or high-impact business results, aiming for quick wins within 4–6 weeks. These wins can be achieved within a single function or across an end-to-end value stream, ensuring a targeted approach to success. The pilot will uncover and address immediate opportunities across people, process, and technology, implementing quick wins as they are identified while also creating a more extensive backlog for transformational improvements. The backlog should be prioritised based on business priorities and the value it is expected to generate. This approach allows us to evaluate predictions against actual outcomes, refine future projections, and recalibrate strategies as needed. By focusing on maximising future impact and enabling iterative development, we can effectively extend use case applications and drive continuous improvement.

This structured methodology is especially beneficial in implementing agentic automation, where enterprise agents evolve similarly to human employees. Freshly deployed agents, unfamiliar with enterprise systems, initially require more guidance and approvals from human supervisors. However, as they encounter and adapt to enterprise tasks and data sources, these agents mature and increase in autonomy. The recommended approach is to start with one agent managing a specific process, ensuring straight-through processing and clear value demonstration before scaling further. Once an agent successfully manages its process independently, we can scale it to other processes or introduce additional multi-agents for new tasks, reinforcing technology adoption through proven success and building institutional support for automation.

6: Customer-centric design

In a customer-centric solution design, the interrelationship across process steps, risk and controls, systems and applications, headcount, and KPIs will be clearly documented and captured to provide a holistic view of the process landscape. The components of the process maps developed will outline the relevant customer journeys and the appropriate risk and control points, ensuring that each aspect of the operation is aligned with customer needs. For example, UK banks are increasingly integrating risk management into their daily operations through a “compliance by design” approach, which enhances both efficiency and innovation. By addressing data quality issues from legacy systems, banks aim for enterprise-level data connectivity, driving better decision-making and enhancing process visibility. This comprehensive strategy ensures that customer experiences are seamless and that potential risks are managed proactively.

Automating certain functions, especially those that directly interact with customers, can significantly boost output, resolution speed, customer satisfaction, and loyalty. The faster and more effectively services are delivered, the more likely customers are to return and recommend the business to others. This is particularly critical in a competitive market where customer experience is a key differentiator. Automation not only streamlines processes but also reduces the potential for human error, thereby ensuring consistency and reliability in service delivery. By leveraging technology to meet customer needs efficiently, businesses can create a positive feedback loop that enhances their reputation and drives long-term success.

7: Turbocharge productivity with agentic automation

The rise of advanced enterprise AI and automation has sparked the creation of new productivity-enhancing tools that streamline both repetitive tasks and complex workflows as part of end-to-end processes. Strategic deployment of these technologies can drive significant transformation.

Historically, automation focused on repetitive tasks, freeing people to engage in higher-value work. Now, enterprise AI has expanded robots' capabilities, enabling them to tackle diverse and complex tasks. This has ushered in agentic automation, where agents—autonomous, AI-driven capabilities—can plan, act, and make decisions. These agents empower employees to automate dynamic enterprise processes and make faster, better decisions.

Agentic automation broadens automation's scope from individual tasks to end-to-end processes. Consider what is happening in financial services, for example. Already, agents are analysing market trends, assessing investments, and crafting personalised financial plans. In the near future, agentic automation will enhance much of the operational workload in financial services while adhering to industry standards. This shift supports financial professionals in focusing on strategic decisions, relationship building, and innovation rather than routine tasks.

There's still significant data and technology fragmentation across the financial services landscape. A recent influx of AI tools has only added to the burden on employees, giving them more capabilities to manage and integrate. Fortunately, enterprise agents offer productivity enhancements that enable employees to easily automate their daily tasks, increase output, and improve the quality of their work. Enterprise agents, like UiPath Autopilot for Everyone, are application-agnostic, built to work across enterprise ecosystems, with integrations for the systems, tools, and data employees need in their day-to-day work.

However, enterprises will also need production environments to create, customise, evaluate, and deploy custom enterprise agents with rapid time to value. For example, UiPath Agent Builder provides a low-code, guided experience for users to build, evaluate, and publish agents straight into enterprise processes. Agent Builder users can also benefit from agent catalogues: ready-to-deploy agents prebuilt to automate specific or complex processes. These often contain a starter set of artefacts like prompts, connections to various tools, and configurable datasets for evaluation.

Crucially, agentic automation doesn't replace traditional automation—it builds on it. Automation platforms provide ideal environments to orchestrate agentic automation, providing the capabilities to build, test, and deploy enterprise-grade agents. To illustrate, the UiPath Platform™ is able to orchestrate between first-party embedded agents, third-party agents, automation robots, and humans executing agentic workflows. This includes the full observation and context of agentic workflows, which guarantees compliant execution and autonomous decision making.

Agentic automation relies on an orchestration platform that enables three key capabilities:

Discover:
Process intelligence tools identify and feed a pipeline of automation opportunities.

Automate:
Robots and Agents handle individual tasks within workflows, with low-code tools to facilitate deployment.

Operate:
Strong process orchestration coordinates tasks across multiple systems, optimising operations.

The implementation of agentic automation undeniably enhances system autonomy, unlocking immense productivity potential and operational efficiency. However, this autonomy raises critical ethical considerations, such as addressing AI biases that may inadvertently influence decision making and determining accountability in the event of critical system failures. These challenges underscore the importance of building robust frameworks to govern ethical AI usage. Moreover, as agentic systems gain independence, they inherently introduce vulnerabilities into enterprise processes. This makes it essential to integrate advanced security measures and establish a comprehensive trust layer, such as the UiPath AI Trust Layer, to mitigate potential risks. By proactively addressing these ethical and security dimensions, organisations can ensure that agentic automation operates responsibly and reliably, fostering both innovation and resilience.

As financial technology evolves, agentic automation will define the future of financial institutions, balancing efficiency, security, and compliance. One leading financial institution in the Middle East is making the transition to agentic automation through the adoption of AI and automation capabilities. By leveraging the approach outlined in this article, the bank has augmented RPA with AI-enabled intelligent document processing to extend the scope of automation into unstructured data and complex scenarios. The addition of task and process mining has also given the bank fresh insight into the drivers of work, creating a pipeline for automation and continuous improvement opportunities. This transformation programme has given the bank the ideal foundation to deploy, monitor, and capitalise on agentic workflows.

8: Sprint to success and continuous improvement

The iterative sprint-based execution empowers agile delivery squads to deliver sustainable results rapidly. These squads implement initiatives that address people, processes, data, and controls comprehensively, maximising productivity and driving impactful change. By breaking projects into manageable sprints, teams stay focused, adapt to feedback, and ensure continuous improvement, delivering robust solutions that meet evolving business needs.

Future-focused tools accelerate the design and value realisation of transformation initiatives, enhancing agility and responsiveness. This enables clients to optimise solutions with minimal disruption, maintain smooth operations, and capitalise on opportunities. Adopting this agile approach allows organisations to refine processes continuously, stay competitive, and achieve long-term success.

9: Transparent performance measurement framework

To achieve organisational excellence, implementing an operational KPI framework alongside a benefit realisation framework is essential. This approach involves defining, measuring, and establishing baselines for a balanced scorecard of core metrics tailored to the needs of different stakeholder groups. When combined with agentic automation, this framework allows human teams to focus on strategic decision-making and problem-solving, while automated agents independently manage routine tasks and optimise operations based on real-time KPI data. Each stakeholder, both human and automated, has clear roles and responsibilities, ensuring alignment and clarity across the organisation.

In this structured system, humans set strategic objectives, interpret complex data, and provide oversight, while agentic automation monitors performance indicators and executes tactical adjustments to maintain efficiency. Together, this dynamic division of roles enhances transparency and accountability, ensuring all efforts contribute to shared business goals. By actively aligning human insights with automated execution, organisations drive sustained improvements, maximise benefit realisation from strategic initiatives, and cultivate a culture of collaboration, continuous improvement, and efficiency at every level.

10: Centralising excellence for transformation

Establishing a centralised Centre of Excellence (CoE) is pivotal for driving operational transformation and fostering innovation within an organisation. Acting as a strategic hub, the CoE ensures alignment across all functions, streamlining efforts toward shared objectives. By centralising expertise, resources, and methodologies, the CoE enables consistent governance, standardisation, and scalability, particularly in the context of agentic automation. This focus ensures that autonomous systems operate effectively within predefined parameters while being integrated seamlessly into organisational processes. Moreover, the CoE acts as a unifying force, aligning automation initiatives with overarching business goals and creating a cohesive, collaborative environment for change.

In the realm of agentic automation, the CoE plays a transformative role by enabling the rapid scaling of agents and ensuring their sustainable operation. It provides a structured framework for opportunity identification, capability building, and change management, facilitating the adoption of automation technologies with minimal disruption. By offering tools, guidelines, and best practices, the CoE supports continuous improvement and ensures that automated processes are resilient and adaptable. This structured approach empowers employees, fosters trust in automation, and positions the organisation to thrive amid evolving business challenges, ensuring long-term productivity and innovation.

Conclusion

In today's fast-paced digital landscape, enterprise-wide transformation presents a powerful opportunity for improving efficiency, accuracy, and adaptability. By integrating agentic automation with an empowered workforce, data-driven strategies, and customer-centric design, organisations can unlock sustained productivity gains and strategic advantages. PwC, collaborating with UiPath as a leader in agentic automation, offers a sophisticated suite of automation tools that support rapid implementation—enabling quick wins and scaling to comprehensive transformation across all functions.

For further insights or to explore how these solutions can benefit your organisation, reach out to the PwC team for expert guidance.

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Learn more about our strategic partnership

Peyman Saatian
Digital Process Excellence Lead, Financial Services, PwC

Lilia Christofi
EMEA Financial Services Data and AI Partner, PwC

Julien Hissler
PwC EMEA Partner Lead/ Director, UiPath

Emily Pham
Principal Product Program Manager, UiPath

Callum Jones
Digital Process Excellence Consultant, Financial Services, PwC

Mariia Lakhonina
Digital Process Excellence Consultant, Financial Services, PwC