ISG Provider Lens®

Intelligent Automation Services

A research report comparing provider strengths, challenges and competitive differentiators



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Intelligent automation in the U.S. shifts toward agentic, effective and experience-led transformation

Agentic automation reshapes enterprises' operating models

The U.S. automation landscape in 2025 is undergoing a radical transformation, driven by the rise of agentic automation, which refers to autonomous AI agents capable of making contextual decisions, handling dynamic exceptions and orchestrating end-to-end processes. These agents are no longer confined to single tasks; they operate across multiple domains, simulate human roles and interact with systems, data and people in real time. Enterprises are embedding these agents into core workflows, enabling frictionless delivery and self-healing operations. This shift marks a departure from traditional RPA and intelligent process automation (IPA), moving toward persona-centric orchestration and multiagent ecosystems that mirror human cognitive workflows. In 2025, the intelligent automation landscape in the U.S. is undergoing a fundamental shift from isolated, task-based bots to integrated, autonomous systems driven by the convergence of advanced AI and strategic business needs. This transformation is powered by core technological developments, including agentic AI operating in multiagent systems via MCP/Agent2Agent (A2A) protocols and the use of LLMs as a judge for quality assurance. In the LLMs-as-a-judge model, an LLM evaluates the output of other AI models or automation workflows, providing a qualitative assessment of their performance.

GenAI and small models power intelligent workflows

GenAI continues to be a foundational enabler, but its role has evolved. Rather than standalone deployments, GenAI is now deeply embedded into automation platforms to enhance document processing, summarization, technical documentation and domain-specific knowledge contextualization. U.S. enterprises are increasingly adopting small language models (SLMs) for privacy-sensitive and cost-effective

Domain-specific tuning, business twins and AI- for- AI shape future automation resilience.

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use cases, especially in regulated industries such as healthcare and finance. These models are fine-tuned for specific business contexts, enabling precision automation and secure orchestration. GenAI also powers copilots and intelligent assistants that support employees across various functions, including HR, finance, legal and customer service. Service providers are leveraging GenAI to build domain-specific agents and augment knowledge workflows across U.S. enterprises.

Hyperautomation matures into modular, AI-first architectures

In 2025, hyperautomation is no longer just about automating isolated tasks. It is about the intelligent orchestration of entire business processes. Platforms are modular, interoperable and AI integrated, allowing for flexible deployment and rapid customization. Enterprises are migrating their legacy RPA scripts to modern, AI-first platforms, often backed by hyperscale providers. This migration is supported by structured consulting, script conversion and governance frameworks. The rise of automation-as-a-service and process-as-a-service models reflects a shift toward outcome-driven engagements, where clients prioritize business impact over traditional pricing structures. Service providers are rearchitecting their automation portfolios to align with modular, AI-first delivery models.

Observability and AIOps drive autonomous IT operations

Observability and AIOps are becoming central to enterprise automation strategies. OpenTelemetry (OTel) adoption is accelerating, enabling unified collection of Metrics, Events, Logs and Traces (MELT) data. This data fuels predictive analytics, root cause analysis and automated remediation. OTel has established itself as the industry standard, ensuring data is collected in a consistent, easy-to-understand format across various environments, languages and platforms. This standardization is a critical foundation for advanced practices. Furthermore, service providers partner with leading observability platform vendors to increasingly focus on a unified approach, recognizing that observability data is security data. This shift supports the growing trend of collaboration between observability and security teams. Enterprises are distinguishing between observability (system visibility) and AIOps (enterprise-wide resilience), using both to build autonomous incident management systems and self-optimizing IT environments. AIOps platforms are becoming increasingly verticalized, with domain-specific models tailored to specific industries, such as banking, healthcare and manufacturing. Technical capabilities now include real-time anomaly detection, automated RCA pipelines and closed-loop remediation integrated with ITSM platforms. Forward-leaning teams are also standardizing on code profiling, which helps teams identify problematic source code and lines for faster RCA, and on observability as code, a DevOps approach that treats telemetry configurations like code to ensure consistency. Together, these capabilities characterize mature observability practices.

Enterprise clients demand measurable, strategic outcomes

In the global landscape of automation, U.S. enterprises stand out as the most strategically mature adopters. Clients expect not just technical feasibility but top-down automation strategies aligned with business outcomes. They demand hard-dollar savings, risk reduction and experience improvements. Commercial models are evolving toward pay-per-use, subscription and gain-share arrangements. Structured governance, persona-based onboarding and behavioral nudges are used to drive adoption and manage change. Enterprises are also investing in automation migration services, including bot rationalization, script refactoring and platform interoperability assessments. Service providers are responding with tailored consulting frameworks and migration accelerators to meet the evolving needs of U.S. enterprises.

Governance, security and ethical AI take center stage

Service providers are embedding governance dashboards and compliance matrices into automation platforms to support regulatory alignment across U.S. industries. As automation becomes more intelligent and autonomous, governance and security are paramount. Enterprises are embedding ethical AI principles, such as explainability, bias monitoring and human-in-the-loop controls, into their automation programs. Compliance with

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regulations such as HIPAA is mandatory for U.S. enterprises, while GDPR and the EU AI Act apply when U.S. organizations process data or deploy AI systems that impact EU residents. There is a growing demand for sovereign cloud deployments and client-owned infrastructure to ensure data control. Observability tools are used for performance monitoring and also for AI model governance, including drift detection, token consumption tracking and automated auditing. AI-for-AI (using AI to govern AI) techniques are being deployed to monitor hallucination risks, validate model outputs and enforce policy-based controls.

Industry-specific automation accelerates time to value

Intelligent automation is being applied across industries with increasing specificity for targeted use cases. In banking, it supports underwriting, fraud detection and collections. In healthcare, it enhances revenue cycle management, clinical documentation and patient engagement. Retailers use it for inventory optimization and personalized marketing, while manufacturers focus on predictive maintenance and supply chain orchestration. Functionally, automation is transforming the HR (onboarding, payroll), finance (reconciliation, financial planning and analysis), customer service (chatbots, virtual assistants) and legal (contract management, e-discovery) industries. Technical implementations include domain-specific LLMs, pretrained intelligent document processing (IDP) models and low-code orchestration layers integrated with ERP and CRM systems. Service providers are codeveloping verticalized solutions with U.S. clients to accelerate time to value and improve operational resilience.

Experience-led automation enhances employee and customer journeys

Service providers are embedding experience analytics into automation platforms to help U.S. enterprises optimize engagement and satisfaction. Experience has become a strategic differentiator in intelligent automation programs. U.S. enterprises are embedding experience-led design principles into automation workflows to elevate EX and CX. Smart assistants and copilots are being deployed to reduce friction, personalize interactions and support contextual decision-making. In HR, automation improves onboarding and performance management, while in customer service, it enables empathetic, real-time support across channels. Enterprises are measuring return on experience (ROX) alongside ROI, using behavioral analytics, feedback loops and persona-centric orchestration to drive satisfaction, adoption and long-term engagement. Experience metrics are being integrated into automation dashboards, including sentiment analysis, interaction quality scores and journey completion rates.

Ecosystem partnerships expand capabilities and reach

Service providers are actively expanding their partnerships with leading automation vendors and hyperscalers to deliver integrated, scalable and future-ready intelligent automation solutions across U.S. enterprises. Collaborations with vendors such as Automation Anywhere, UiPath, Microsoft, AWS, Google Cloud and ServiceNow focus on enabling agentic workflows, GenAI orchestration and secure automation pipelines. For instance, UiPath and Microsoft have launched bidirectional integrations to support AI agent interoperability, while Automation Anywhere is embedding agentic process automation (APA) into complex workflows such as loan processing and HR onboarding. Hyperscalers such as AWS and Google Cloud are providing foundational infrastructure and model hosting capabilities, including support for bring-your-own-LLM (BYO-LLM) configurations and secure pseudonymization of PII data. Service providers are cocreating solutions with these partners to enhance observability, governance and orchestration, while also aligning with enterprise-specific compliance and performance requirements.

Future outlook: autonomous, responsible and scalable automation

Looking ahead, the U.S. intelligent automation market is poised for continued innovation and expansion. Enterprises will demand autonomous operations that deliver measurable outcomes and business agility. Providers must strike a balance between innovation and responsibility, scale through modular architecture and sustain value with effective governance. The convergence of CoEs of AI, automation and data into unified

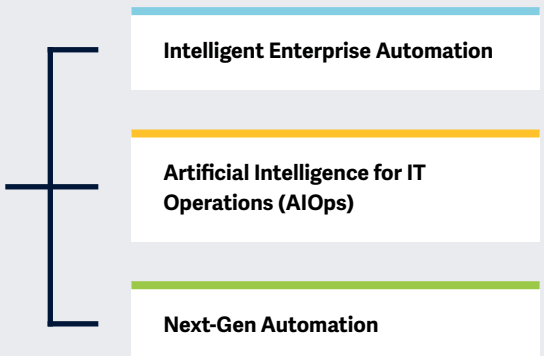
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transformation hubs will accelerate cross-functional collaboration. Technologies such as chaos engineering, business twins and AI-for-AI will define the next frontier. The winners will be those that can deliver context-aware, secure and outcome-driven automation at scale, supported by resilient architectures, real-time observability and adaptive orchestration engines. Service providers are expected to play a central role in orchestrating these transformations across U.S. enterprises.

Experience, governance and verticalization are redefining the benchmarks for intelligent automation. U.S. enterprises are demanding services that improve their automation index through contextual intelligence, ethical AI and domain-specific orchestration. Service providers are responding with precision and outcome-driven pricing. They are embedding modular architectures, agentic AI and observability frameworks to support scalable transformation.

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The study examines GSI's intelligent automation ability to **drive digital transformation** across **IT, business services and corporate functions.**



Simplified Illustration Source: ISG 2025

Definition

As of 2025, intelligent automation has evolved into a strategic capability driven by generative AI (GenAI) and agentic AI. GenAI's integration with automation allows analysis and contextualization of complex data while generating predictive insights. Global system integrators are exploring viable use cases of agentic AI systems embedded with contextual understanding, adaptability and reinforced learning for autonomous decision-making within automated workflows.

Clients are pivoting from siloed automation projects and point solutions to industry-specific process automation. They seek scalable and autonomous processes that can be transformed into productized services for enterprise-wide deployment. As the intelligent automation landscape evolves, full-stack observability, data democratization and enterprise process orchestration will be critical for building a competitive automation portfolio. Enterprises comprehensively evaluate automation, tracking key metrics at regular checkpoints to support iterative improvements for enhanced business outcomes and experiences (CX, UX and EX). Low-code application platforms (LCAPs) also democratize automation by empowering users with intuitive interfaces. The increasing demand for skilled professionals in the intelligent automation domain has prompted global system integrators (GSIs) to invest in talent transformation programs, upskilling their workforce to meet the market's evolving needs.

Security integration and data privacy are gaining significant momentum, with AI ethics as a cornerstone, particularly due to the influence of LLMs and agentic AI systems. Moreover, the focus on green and responsible automation has intensified, emphasizing the development of sustainable automation practices.

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Sweet Spot

LOWCODEMINDS

Overview

LOWCODEMINDS is a specialist in AI-led process orchestration and knowledge work automation. Headquartered in Delaware, U.S. the company operationalizes AI by unifying workflows and enabling scalable automation. With strong domain expertise across BFSI, telecommunications, legal, manufacturing and healthcare, it delivers intelligent automation services that leverage LCNC platforms, RPA, IDP, process mining and AI agents.

Key Provider Capabilities

LOWCODEMINDS delivers end-to-end intelligent automation services, combining AI-led process orchestration with knowledge work automation. It addresses knowledge-intensive challenges across industries by focusing on orchestrating AI services through intelligent agents that embed domain expertise, logic and workflow intelligence into enterprise processes. These agents interpret unstructured content, trigger adaptive workflows, manage exceptions and support human-in-the-loop refinements across various platforms, including Appian, Pega, Power Platform, IBM, Camunda and Neota.

Process orchestration: The company establishes a unified orchestration layer that streamlines fragmented workflows and enables AI scalability. This foundational approach ensures that automation initiatives are aligned with enterprise architecture and compliance needs.

Knowledge work automation: Moving beyond task automation, LOWCODEMINDS focuses on automating decision-making and cognitive processes. Its solutions leverage LLMs and AI agents to deliver autonomy and adaptability in complex business environments.

Robust technology ecosystem: Strategic partnerships with Appian, Pega, IBM, UiPath, Automation Anywhere, OpenAI, Microsoft, AWS, and Google enable LOWCODEMINDS to integrate seamlessly with client ecosystems. This approach ensures interoperability and maximizes existing technology investments.

Innovation and delivery: LOWCODEMINDS accelerates creation of intelligent automation solutions through App Labs, its dedicated R&D hub backed by over $1.5 million in investment. App Labs co-creates next-gen solutions by converting process gaps into plug-and-play, IP-rich accelerators for knowledge-intensive work. It has delivered over 18 reusable accelerators and solutions, including Legal-Hub for enterprise legal matter management, Neo Legal for law firms, Telecom Tower and Site Management, Contract Lifecycle Management, Insurance Claims Management, alongside AI governance and compliance workflows and AI-driven knowledge enablement.

Benefits Delivered

- **Accelerated knowledge automation:** Streamlined complex workflows and document-heavy processes using AI and orchestration
- **Cost and compliance gains:** Reduced operational overhead while improving audit readiness and regulatory compliance through intelligent governance
- **Scalable transformation:** Maximized ROI by leveraging existing technology investments for enterprise wide automation

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LOWCODEMINDS

Sweet Spot

- **Structured orchestration methodology:** LOWCODEMINDS anchors its automation approach in a *Process-Orchestration-first* framework, supported by proprietary accelerators and governance models. Additionally, it establishes an orchestration platform and CoE to facilitate enterprise adoption. It identifies process fragments across ERP systems, home-grown applications, RPA, iPaaS tools and BPMS solutions, then elevates them into a unified orchestration layer. It standardizes business logic, implements end-to-end workflows, and utilizes AI-powered co-pilots and reusable connectors to convert legacy automations into orchestrated, scalable processes. The company enables agentic orchestration with guardrails and human-in-the-loop controls.
- **Innovation engine:** LOWCODEMINDS drives continuous innovation through App Labs, a specialized R&D and co-creation hub. With a $1.5 million investment, App Labs focuses on identifying ground-level process gaps and transforming them into reusable accelerators and orchestration components. It emphasizes rapid prototyping, governance-ready frameworks and GenAI integration for document intelligence and compliance workflows. Delivered 18 accelerators and solutions, including conveyancing management, claims management, legal case tracking, litigation management, contracts lifecycle management, compliance workflows and AI-based knowledge enablement.
- **Domain-specific solutions:** LOWCODEMINDS provides proprietary solutions, such as Legal-Hub, to digitize end-to-end matter management, manage the document lifecycle and track compliance. It also offers accelerators for telecom tower and site management, AI-powered debt recovery for financial institutions, claims management for insurance, conveyancing and procurement workflows, hospital management, embedding automation and AI-driven decision support across verticals.
- **Enterprise outcomes:** The company's value-based pricing and adaptable delivery models ensure alignment with client objectives. Its proprietary frameworks and accelerators create a foundation for sustainable ROI, while governance-driven orchestration mitigates risks associated with fragmented automation and technology sprawl. By automating knowledge-intensive processes, it frees human potential from repetitive work and accelerates ROI.

Future roadmap

Multiagent expansion: Expand multiagent orchestration to automate complex workflows, integrate adaptive decision-making and deliver predictive exception handling across enterprise processes

Industry-focused solutions: Invest in industry-specific offerings, embedding advanced analytics and AI-driven compliance capabilities

Ecosystem strengthening: Deepen partnerships with hyperscalers and LCNC platforms for interoperable, enterprise-grade automation solutions

Responsible AI: Further embed sustainability and ethical practices in automation deployments

Accelerate innovation through App Labs: Expand its R&D focus to deliver IP-rich accelerators, reusable connectors and GenAI-enabled orchestration components

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Appendix

The ISG Provider Lens® 2025 – Intelligent Automation Services study analyzes the relevant service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of December 2025 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars ($) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of Intelligent Automation Services market
2. Use of questionnaire-based surveys of service providers/ vendors across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

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Ashwin Gaidhani has over 22 years of experience as an SME, advisor, practitioner and researcher in ESM and emerging technologies. He has worked as a global practice leader and an executive-level advisor in ESM, automation and cloud technologies, covering business transformation, ITES & ITIS, AIOps, CloudOps, metrics-driven practices. As an ISG Lead Analyst and research partner for studies related to hyperscalers such as AWS and Google, ESM services and platforms, and intelligent automation, he defines and leads the ISG Provider Lens® research projects for the markets in the U.S. and Europe. With his extensive experience in service management, Ashwin has worked in technology operations, business consulting and advisory roles for large Global System Integrators (GSIs), independent software vendors (ISVs) and technology services companies. He is highly qualified and experienced in offering guidance on technology practice adoption across industries such as BFSI, manufacturing and retail.



Lead Author

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Co-lead Analyst

Sameen is a co-lead analyst with ISG, with a key interest in the market and industry research across emerging technologies. She co-authors Provider Lens® studies on intelligent automation, AWS, Google Cloud, mainframes and others. She is also involved in authoring research articles, enterprise context and global summary reports with emerging technological landscapes. Her areas of expertise are automation, hyperscaler ecosystem, telecommunication, and retail.

Sameen has managed diverse technology, business, and consumer research teams, transforming market data into actionable insights and intelligence reports for several leading firms. In her prior roles, she has worked on competitive intelligence, market feasibility and SWOT assessment, GTM strategy, customer satisfaction and brand health studies. Her expertise synthesizes advanced technological understanding for competitive positioning and emerging innovation trajectories for global and regional markets.

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Study Sponsor



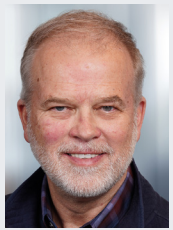
Namratha Dharshan

Chief Business Leader

As a Chief Business Leader at ISG, Namratha Dharshan spearheads the BPO, AI and Analytics arm of the ISG Provider Lens® program, contributing to more than 20 reports. Under the aegis of this program, where she heads a team of analysts, Namratha manages the delivery of research findings on service provider intelligence. As a part of her role in the Senior Leadership Council, Namratha is the designated representative of the ISG India Research team, comprising more than 100 dynamic research professionals. In addition, Namratha is a speaker in ISG's flagship quarterly call, ISG Index™.

As a principal industry analyst and thought leader, Namratha is well recognized for her contributions to service provider intelligence and her understanding of the customer experience landscape, particularly the area of contact center services. She has also authored reports on other horizontal service lines such as finance and accounting and penned vertical focused reports for insurance.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens®/ISG Research

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes;. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry.

Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a partner and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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ISG Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners.
ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

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ISG

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The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

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ISG Provider Lens®

DECEMBER, 2025

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