



# HFS Hot Vendor: Enate

Coverage initiated: Q1 2019

# Introduction

The HFS Hot Vendors are an exclusive group of emerging players, each with a differentiated value proposition for the HFS OneOffice or HFS OneEcosystem. HFS analysts speak with numerous exciting startups and emerging players.

We designate a select group as HFS Hot Vendors based on their offerings' distinctiveness, ecosystem robustness, client impact, financial position, and the impact in our OneOffice and/or OneEcosystem Frameworks. The HFS Hot Vendors may not (at the time of writing) have the scale and size to be featured in our Top 10 reports, but they have the vision and strategy to impact and disrupt the market.

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Enate is a UK-based software company that offers its SaaS-based service orchestration platform to manage digital, human, and hybrid workforces. The platform combines ticketing management, case management, work and capacity management, and workflow capabilities with a real-time performance dashboard to manage and govern the provision of work across enterprises. It can be applied to human workforces (e.g., humans in shared services organizations), digital workforces (e.g., RPA bots), or, as enterprises embrace intelligent automation (IA), hybrid workforces combining these elements.

The company started life as a consulting and bespoke development company in 2000. In 2011, it became a product company, launching a platform designed for BPO service providers to help them deliver services more effectively through workflow management and governance. In late 2014, the firm became acquainted with RPA and began to conceptualize the potential of digital workers and the impact on labor arbitrage-based service organizations. It opted to pivot its business, leveraging its knowledge and experience orchestrating human-based workflows, to create a platform that supported the wider purview of the growing hybrid workforce.

Enate's platform launched in January 2017, coinciding with a surge in RPA and broader

IA adoption which heightened the need to manage changing workforces. Enate has targeted RPA software providers like UiPath and specialist automation service providers like Symphony and Roboyo as partners. They helped position Enate as part of an ecosystem of providers that can help enterprises scale and industrialize their IA programs.

Enate currently has 15 enterprise customers, and the pipeline is growing incrementally. It is working on adding further service providers and automation software partners. Enate is a private company and has not yet taken any institutional funding. HFS expects it may pursue an initial tranche in 2019 as it continues to gain traction. In HFS' reference interviews with clients, customers were excited by the potential of the Enate platform, but they were cynical it could deliver. Thus, Enate was put through robust proofs of concept and scalability exercises to prove its effectiveness and its viability as an enterprise-grade tool. One client used Enate to first optimize its human workflow then, when sorted, to layer in digital workers. Another client leveraged the hybrid workforce management functionality, and it is especially bullish on the resulting process data and reporting that is helping its operation further refine its hybrid workforce operations. In all cases, clients indicated Enate was critical to scaling their IA operations.

HFS has designated Enate as a Hot Vendor due to its functionality and focus on managing the workforce of the future. As enterprises continue to embrace RPA and broader forms of IA, there is a gap in tools to manage and govern the emerging hybrid human and digital workforce. Many enterprises have developed approaches to managing digital workers, often leveraging the control tower functionality inherent in many RPA tools and establishing bot control-room management operations. These are typically specific to digital workers and generally can only accommodate one RPA vendor, rather than the hybrid tool environments many enterprises have today. This approach generally omits the humans that are and will continue to be intimately involved in workflows.

Enate is striving to fill this gap with its built-for-purpose platform, years of operations experience, and a savvy network of ecosystem partners. It focuses on supporting enterprises based on where they are in their automation journey—enabling orchestration of human workforces often to standardize and improve processes and workflows in preparation for automation; digital workforces to ensure viable management of unattended or multi-vendor bots; or hybrid workforces to define and manage workflows and governance and ensure human in the loop while gathering process data to help measure and refine results.

While Enate is definitely in the right place at the right time, it is essentially an optimizing agent for the broader IA market. This means that its biggest growth challenge is sales. Convincing enterprise customers that they need another investment to optimize their IA investments can be a hard sell. Enate needs process-knowledgeable resources that can articulate benefits and explain the need for hybrid service orchestration. Its partner network is critical to this task, particularly the RPA software vendors. Its agreement with UiPath, in which UiPath is serving as a reseller of Enate, is a strong endorsement that Enate adds value to RPA and enterprise automation programs.

Moreover, Enate is still a relatively small company that needs to scale, and should continue investing in its product to ensure it is enterprise-grade and highly adaptable to large enterprises' varied tech environments. . It also needs to help with the next chapter of market education for what best-in-class hybrid operations look like. The additional sales that will likely flow through its channel off the back of its UiPath relationship and other pending partners, plus any potential external funding, can be used to foster this necessary scale.

## Vendor factsheet

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- Founded in 2000
- Key executives include Kit Cox (Founder and CEO), Uday Jose (COO), Peter Williamson (Chairman), and Bill Thomas (non-Executive Director)
- The firm is currently private and self-funded.
- Employees: ~35
- Headquartered in Cheltenham, UK with regional operations in India
- Number of clients: 15 enterprise customers, some of whom wrap the product into services delivered to their corporate clients
- Marquee clients: EY, Generali, Mizuho, CMS, TMF, Capgemini, SD Worx, Capita, Fragomen, BAE Systems

## Solution portfolio

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Enate offers its service orchestration product on a software-as-a-service (SaaS) basis, with pricing starting at \$58/user/month and a minimum of 40 users. A community edition will be launched in April 2019 to allow potential customers to explore the platform directly, and the Enate Academy offers user training on demand.

While Enate is associated with orchestrating RPA bots, it can essentially orchestrate anything that can make a web service-call. So if a machine learning algorithm can make a web service-call to Enate, then Enate can orchestrate it.

Key platform features include:

- **Service orchestration:** orchestrates the delivery and management of services across a human, digital, or hybrid workforces
- **Service management:** gives end-to-end visibility and control of services, including the automation of Key Performance Indicators (KPIs) and Service Level Agreements (SLAs)
- **Ticketing and email management:** managing all inbound and outbound emails and creating work that needs to be done as tickets and cases
- **Case management and workflow:** smart cases support workflow controlling activity across multiple locations to global and local standards
- **Workforce management:** controls what resource (human or robot) does what work, where, and when to optimize performance against SLAs
- **IA technology integration:** without the need for bespoke technical integration: whatever RPA, AI or Cognitive technologies are in play now, or may be in the future
- **Governance:** Enate flips work from a bot to a human when things go wrong, keeping the human-in-the-loop
- **Management information reporting:** includes a detailed cost and productivity reporting capability and helps you understand what to automate next

## Industry coverage

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Enate's value proposition is broadly applicable across industries, particularly in functions such as finance, legal, and HR. Current customers span professional services, banking, insurance, and wealth management.

## Partnerships

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- **Technology partnerships include:** UiPath, a reseller of Enate (an Enate connector is available on UiPath Go!); Blue Prism; Softomotive
- **Implementation partnerships include:** Roboyo; Symphony Ventures (a SYKES company); Machina; New Dawn; Accelirate; Exandor; Morpheus; Unlock Insights; Actimai; transformAI; LatentBridge. Additional partner agreements are in the process of being finalized



# About HFS

## Insight. Inspiration. Impact.

HFS is a unique analyst organization that combines deep visionary expertise with rapid demand side analysis of the Global 2000. Its outlook for the future is admired across the global technology and business operations industries.

Its analysts are respected for their no-nonsense insights based on demand side data and engagements with industry practitioners.

HFS Research introduced the world to terms such as “RPA” (Robotic Process Automation) in 2012 and more recently, the HFS OneOffice™. The HFS mission is to provide visionary insight into the major innovations impacting business operations such as Automation, Artificial Intelligence, Blockchain, Internet of Things, Digital Business Models and Smart Analytics.

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