

A CIO's Guide to Leveraging Cognitive Automation as a Strategic Asset

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OVERVIEW

Cognitive Automation is a new transformative technology allowing organizations to digitize decisions, leveraging recent leaps in data science, machine learning, and cognitive process digitization. It's also an area being led and adopted by both IT in that it solves some badly needed problems of the business as well as a platform capability needed by IT to enable long-term digital transformation. This paper is aimed specifically for the CIO providing practical lessons from early-adopters in implementing Cognitive Automation with blueprints for practical implementation as well as strategies for building long-term innovation.

1. ALIGNING STRATEGIC OBJECTIVES

The most critical role of the CIO is navigating long term technical strategy through a highly complicated landscape, rationalizing these investments against returns to the business, and building IT infrastructure in a way that enhances competitive differentiation and intellectual property (IP) value. Every technology investment is a tug of war: minimizing risk versus maximizing the technology innovation, leveraging existing infrastructure or clean sheet technical jumps, and high-IP custom development against cost-efficient commercially off-the-shelf solutions. Most technologies coming out of Silicon Valley often ignore this reality of the CIO. Fortunately, there is an approach to adoption of Cognitive Automation that recognizes these challenges and provides a practical roadmap that realizes value along the way while leveraging investments at each successive stage.

“ Cognitive automation frees information from the old data and process silos of traditional enterprise applications. It enables more responsive operations focused on delivering business outcomes in the moment – locating underused assets, anticipating interruptions to supply or spikes in demand, coordinating necessary actions, and learning as it goes. ”

For an overview of Cognitive Automation, see [“How Cognitive Automation Unlocks the Future of Enterprise”](#)

1.1 Existing Infrastructure and the Rip-and-Replace Quandary

One of the primary questions for CIOs is whether Cognitive Automation is a brand new technology stack or an evolution of the existing stack. In truth, neither is entirely correct, for Cognitive Automation both relies on existing infrastructure yet behaves dramatically differently than current IT stacks. One useful analogous model comes from nature itself—the Darwinian evolution of human cognitive capabilities.

If you look at the human nervous system, it isn't a monolithic system optimized for a sole purpose. Rather, it is a series of specialized systems and cell types optimized for specific functions, yet is coordinated in a highly synchronous way. Looking at the system from an evolutionary perspective, it's clear much of the nervous system is made of successive system advancements building off and complementing older systems. Evolution provided critical jumps, from essential sensory systems in early multi-cell organisms, motor control systems to direct actions towards survival shortly thereafter, autonomic regulatory systems that allowed organisms to become more complex, and beyond. Fast forwarding several million years, and we see higher order functions represented in the human brain with areas for executive function, mid-level auditory and visual processing, and our basal ganglia and related structures representing our more 'lizard' brain functions.

What does this have to do with our existing enterprise IT infrastructure? It provides us a perfect model of looking at Cognitive Automation—a system built upon our existing IT infrastructure but a separate evolution to higher order function. A Cognitive Automation system should have the ability to hook into existing systems, similar to axons that connect directly to motor and sensory systems. The Cognitive Automation system should have native protocols to ‘crawl’ native data structures, interpret their content within the larger enterprise organism, and direct actions back to those systems in their native environment. For example, being able to read inventory data structures natively within SAP and Oracle enables you to keep those investments, while using that information in much higher cognitive processes to do higher order functions like predict future inventory, consider adjustments against business needs, and execute responsive action.



Saqib Mehmood,

RB Chief Information Officer,

[CXO Talk](#)

“ *The biggest benefit for us is in creating a brain within the company and having an ability to preserve it as people make decisions on top of it. For us, it is not just about making smarter decisions but retaining that knowledge within the company.* ”

1.2 The False Conflicts of Data Lakes

Much has been written about whether or not data lakes have lived up to their promises to enterprise organizations. A similar amount has been written from vendors about working with or replacing data lakes. Yet the truth is much more complicated, as no two data lakes are ever alike. They vary dramatically in breadth (from scope-confined, well-structured data, to expansive-scope implementations integrated external partners and unstructured data), in data model clarity (from well-ordered ontological systems, to semi-organized information, to purely un-rationalized mirrored storage), and freshness (from periodic batch processing optimized for low-overhead processing windows, to real-time pipeline ingestion systems).

If we again assume a tightly coupled, yet separately evolved Cognitive Automation system, whether data is in a data lake or not doesn't matter. You could consider the data lake synonymous to a spinal column, providing an alternate option to direct connection to the end system. So then the only considerations of the data lake is whether it satisfies the basic sensory needs of the cognitive system:

- **Sensory Timeliness:** Is the data lake processing data at the speed required by the business? Cognitive Automation systems can only react as fast as the slowest data, so a data lake batch processing certain information once a day means the reaction time is limited to at least 24 hours for processes utilizing that data. The more real-time the data lake, the more likely it can be used seamlessly for cognitive automation.
- **Contextual Structure:** Tightly coupled Cognitive Automation systems provide a tremendous amount of contextualized data from explicitly understanding how data is structured in those vendor systems, and implicitly by knowing how to derive deeper context using the master data definitions of those systems. The most useful data lakes are the ones who retain their native data structures.

Why not fully cleansed systems (i.e., highly processed, post-ETL data)? Unfortunately, it is extremely rare that any single organization has the time and investment to make a fully comprehensive ontological model and have it applied across data sets. More often than not, some data ends up being of good quality and some not so good quality, with the loss of ability with which to recover the context.

What this means is data lakes are perfectly capable of working with Cognitive Automation, if data passes the test of timeliness and contextual structure. Interestingly, there is a model where Cognitive Automation becomes a processing arm of a data lake, directly connecting to end systems in native protocols for use in cognitive processes, but simultaneously providing data back to the data lake. No cognitive automation system would be designed for this ultimate goal, but it can be a benefit when Cognitive Automation is smartly deployed. But this is a topic for another discussion.

1.3 Business Intelligence as a Means AND an End

Business Intelligence (BI) or visibility has become a huge industry of its own, with many organizations investing heavily in software, training, and embedding BI into their standard operating procedures (SOPs). There are, however, two key roles and considerations of BI in terms of Cognitive Automation:

- **Dashboard Sprawl:** The list of available dashboards within an organization rarely shrinks. Beyond how many reports and dashboards are actually used or useful is the question of how many of them only serve for interim decision assistance. A well done Cognitive Automation system can enable organizations to retire large sets of interim reports that exist to serve manual decision processes. For example, does an organization need a series of ABC inventory reports in a system that automatically incorporates ABC attributes in automated decisions, or even makes ABC segmentation irrelevant because decision processes can be made at scale down to the most granular level?
- **Glass Box vs Black Box:** BI can serve a role when integrated with a glass box (i.e. a transparent implementation showing exactly how a decision or recommendation was made) approach to Cognitive Automation. Failed attempts at Cognitive Automation have attempted black-box approaches where humans couldn't see or understand why a system came up with a recommendation. A good Cognitive Automation system should be much like a new college graduate in a new role, capable of making independent decisions and able to fully explain and defend that decision. A good Cognitive Automation system should have that level of transparency, using a glass box approach and incorporating relevant BI reports to explain decisions. Better yet, they can also serve as critical learning moments when humans can pass along different interpretations of the same data from which the system can learn over time.

The result is Cognitive Automation can reduce reliance on a large number of reports, enabling the organization to focus BI efforts on analysis in core IP areas or exploring potential strategic actions of the business. Similar to the prior data lakes discussion, a good cognitive automation system can actually become an additional data source for BI efforts, enabling API access to cognitive processes and even harmonized system data.

1.4 A Data Scientist-Friendly Platform

One of the most constrained assets of any IT/Technical organization is hiring, retaining, and effectively utilizing data science talent. Yet the day-to-day job of a data scientist has little to do with their speciality and value added potential; rather, it is spent discovering and preparing data.

79% of data scientists' time is spent on collecting, organizing, and cleaning data¹

¹ Forbes: Cleaning Big Data: Most Time-Consuming, Least Enjoyable Data Science Task [\[Link\]](#)

One of the strongest benefits of a cognitive automation solution is the harmonization of data as part of the core system capability. A tremendous amount of inefficient data scientist time can be offloaded by:

- **Harmonized Cognitive Data Layer:** Part of a core function of a Cognitive Automation platform is the organization and normalization of sensory data for use by higher order processes. This effectively creates an abstracted, semantic data layer representing the digital twin of the organization. Data scientists can now access data sets that have been pre-harmonized by the platform.
- **Data Specialization of Duties:** An abstracted cognitive data layer also means data preparation functions can be handled by a separate set of analysts and processes. Data analysts can manage and administer the set of data preparation for the systems they are experts in. This enables data analysts and data scientists to spend far more time on their core skill sets.

For the foreseeable future, Artificial intelligence/ machine learning is going to be a dynamic evolving technology domain. CIOs need to maintain maximum flexibility of data science teams to use these evolving tools in a flexible way. A well-implemented cognitive automation platform enables a multi-modal approach:

- **Integrated Data Science Tools:** A core set of methods and algorithms should be part of a cognitive automation system to enable rapid proto-typing and easy deployment by data scientists. This includes rapid model creation, operationalization, and performance monitoring to improve models.
- **Library of Task-Specific Algorithms:** Even at this early stage of data science, there are core sets of established algorithms best suited for specific common tasks, like demand forecasting. A good cognitive automation platform also includes common algorithms for those common tasks, typically outside core IP activities of an organization, that benefit from AI/ML application but wouldn't necessarily be where organizations want to invest the time of their data scientists.
- **Bring-Your-Own-Models:** Many organizations already have operationalized models from either in-house development or developed by external third parties. A cognitive automation platform allows organizations to host pre-developed models within the same platform.

This flexibility creates an operationally nimble data science cortex that improves the efficiency of in-house data science teams and preserves maximum flexibility for these teams.

1.5 Resource Optimization and Evolving (Not Replacing) Headcount

Headcount is a significant component of any CIO's budget. But managing these assets goes beyond simple headcount costs. More important to most organizations is the return on this investment to the core operations of the business. Unlike the Robotic Process Automation(RPA) on human process replacement, one of the hallmarks of Cognitive Automation is the elevation of roles held by our staff members and an increase in their overall effectiveness. In fact, Cognitive Automation helps the following critical areas (specifically for IT roles, the considerable benefits to the rest of the business are covered elsewhere):

- **Segmentation and Optimization of Duties:** Technical staff fall into several specialized categories by training and preference. A well-designed Cognitive Automation will accommodate these specialties and avoid monolithic software training:
 - **System Analysts/Data Engineers:** Enables IT professionals with expertise in specific systems, or specific related data sets, to configure and manage connection and data extraction for these systems. They can utilize pre-defined protocol and data-mapping crawlers to point-and-click connect standard data sets but also use integrated visualization tools for non-standard data transformation rules needed for an organization's customized or idiosyncratic data sets. This work is published in a common data catalog in the Cognitive Automation platform for use by other team members in their activities.
 - **Business Analysts:** Allows the typical creation of reports and KPIs needed as part of digitized decisions. Reports and dashboards available in a common catalog for use by various decision processes and callable as part of the 'glass box' approach to Cognitive Automation to show how decisions were made. Business analysts can use APIs to call existing analytics or to create APIs to use in any create analytics for use in an organization's existing data lake or BI infrastructure.
 - **Data Scientists:** Gives data scientist access to pre-groomed data sources and focuses on tasks closer to core duties: model creation and management, outlier/clustering strategies, validation and holdback strategies, performance monitoring and tuning. They are also able to create their own data sets if needed, utilizing the same tools used by business analysts and data engineers. Data scientists are able to connect any existing models, or models created in other data science packages, for use by the Cognitive Automation platform.
 - **Business Process Analysts:** Enables process analysts to build process rules that reflect an organization's business goals, or select from a catalog of pre-defined process rules. They can also utilize object-oriented access to data sets, analytics, and AI/ML sub-processes as components of process rules. Process analysts may also create re-usable cognitive processes (forecast process, allocation processes, RFQ processes, etc.) that can be used across multiple digitized decision processes.
 - **Business Process Managers:** Enables less-technical but more business-oriented business processes managers to define business rules or criteria that reflect SOPs and risk appetites. Includes regional restrictions or rules, thresholds for decision automation vs human exception workflows, customer requirements, location requirements, etc.
 - **Digital Transformation/Change Managers:** Enables transparency into how Cognitive Automation platforms are performing automation decisions and how teams are interfacing with the platform in augmented decisions. Provides visibility into recommendation execution and results for improving processes.

- **Reduction in Non-Value Added/Non-Intellectual Process Work:** With both pre-defined process and skills catalogs for common supply chain processes, and object-oriented digital decision process defined, a team can significantly reduce time spent on activities outside the core revenue generating activities of the business. For example, digitized inventory management can take care of the day-to-day balancing material availability against costs and service goals and let teams focus on network redesign or postponement strategies that may be more critical to the long term product strategies.
- **Self-Service and Retention:** The final outcome of a separation of duties, self-service access to catalogs of data, analytics, and processes, translate into less time in non-core, low-value activities and more on creative high-value innovation activities. Also enables teams to participate in cutting edge cognitive automation using existing skill sets.

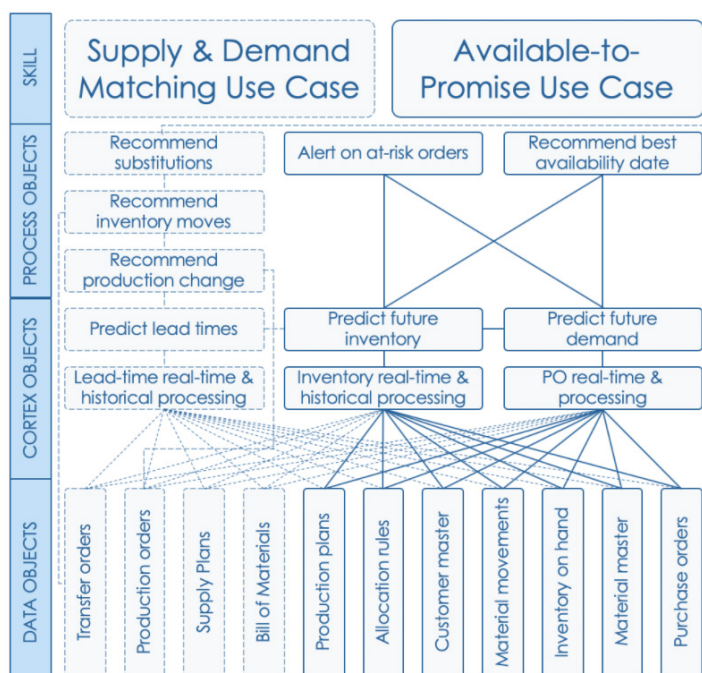
When done right, the net result of the application of a Cognitive Automation platform will actually decrease overall wasteful work even when rolling it out as a new IT application.

2. BUILDING CAPABILITIES AND REALIZING VALUE

From the very foundation of their role, CIOs have been challenged in how to adopt disruptive technologies, which by their very definition act and behave much differently than the systems that came before them. One of the major issues—integration with existing systems and avoiding the need for rip-and-replace strategies—was covered in the last section. Here, we'll address the other major challenge: how to achieve value/ROI on disruptive technologies without having to wait years or invest millions of dollars.

Fortunately, the unique way Cognitive Automation evolved has also brought a practical adoption approach. By systematically focusing on reasonably sized use cases with the foresight to establish reusable data, processes, and cognitive capabilities that can be utilized in future use cases and iterations.

2.1 Interoperability and Investment Reuse Strategies



In a reusable object model, capabilities built in one case can also be used by other use cases. For example, the available-to-promise use case creates a cortex object (higher order information processing) that predicts future inventory at the SKU/location grain. A second use case, supply and demand matching, adds the ability to recommend actions and meet ATP and demand promises. This also reuses the predict future inventory object, but enhances it with ties to upstream production lead time predictions

CIOs can achieve rapid ROI by implementing Cognitive Automation using the following strategy:

- A. Identify a well-defined use case aligned with immediate priorities:** A good Cognitive Automation platform will be flexible enough to be used in a limitless number of use cases. The first step in building this platform is to identify a use case with both well-defined measurements recognized by executives and with some measurement already in place. This immediately focuses a transformative technology towards a specific business return and also provides technical clarity towards what systems, objects, and recommendations are needed to fulfill it.
- B. Document potential next use case priority list:** Knowing which adjacent use cases may be developed in the future helps design reusable objects for these future use cases, while also ensuring extensibility to the initial ones as enhancements come online. This creates a faster path to both the next use case(s) and more responsive improvements to existing ones.
- C. Implement a step-wise leveraged investment strategy:** Once an object view of use cases exists, it becomes clearer which use cases are the shortest step away from existing use cases. Sequentially deploy adjacent use cases as they align with business needs. Establish non-adjacent use cases when needed by the business and follow the same adjacent model to accelerate it's related use cases.
- D. Enhance previous use cases with each new step:** As data objects and cortex objects are available for more of your end-to-end supply chain, periodically review where use cases can be enhanced. For example, an ATP use case can predict availability based on data objects from production to fulfillment. Implementing material availability adds data objects on supply and bill of materials (BoM) considerations. This means the ATP use case can now extend farther upstream (e.g. BoM explosion and raw material availability prediction) with finer accuracy and granularity.

2.2 Transactional Rationalization and Dissociation

While ERPs and other similar systems have been the anchor of supply chains since the 1990s, these technologies have not delivered transformative improvements in the past 30 years. Even the movements to cloud-based models and in memory database strategies have been incremental functional improvements. More impactfully, most of these technology areas have coalesced around a few very large vendors. These companies have reached a lifecycle stage built around preserving these core applications' market presence and using this dominance to innovate by acquisition. For CIOs this has translated into core, technical monoliths that are slow to advance and when they do are often acquired products that either don't integrate well, or require significant investment in custom integration projects.

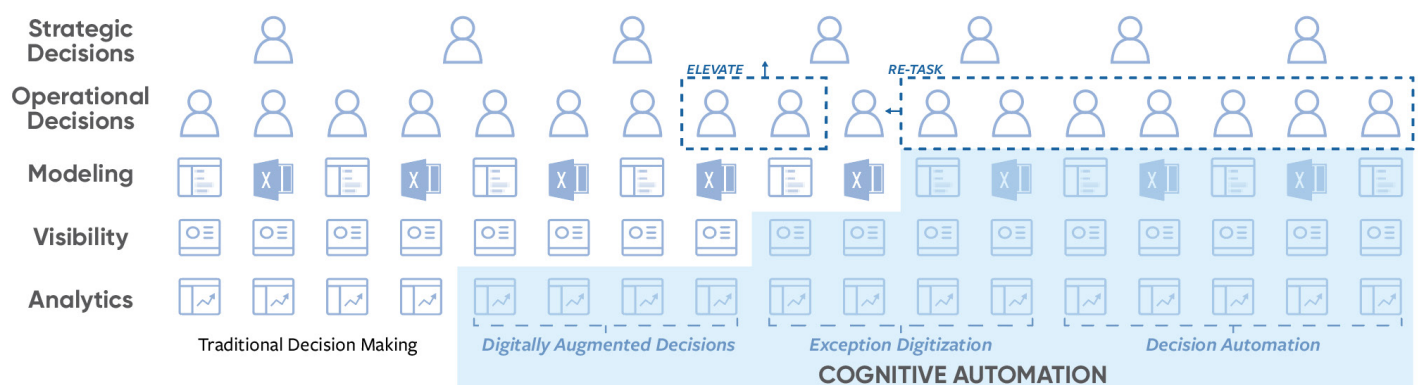
Cognitive Automation helps organizations better rationalize big IT investments by enabling the following strategy:

- **Focus large transactional systems around stability and cost optimization:** From a technology lifecycle perspective, transactional systems are the plumbing of the organization. They are clearly a critical part of a company's strategy, but the priority is ensuring stability. To further the home analogy, it's also not the main systems around which most people make the more frequent changes to fit behavioral needs. In other words, when the plumbing works, don't touch it.

- **Evolving an overlay Cognitive Automation system as a transformational layer:** Multi-year, expensive upgrades of a monolithic transactional system are a common challenge of all CIOs. Trying to drive transformative innovation on these critical platforms exposes the CIO to considerable amounts of risk and considerable out-of-budget cost growth. Cognitive Automation enables organizations to take innovation pressures off core transactional systems and separate these critical components from the ups and downs of the business. Just as importantly, it also means you can define better cost controls on these systems and better allocate innovation dollars that aren't burdened by this legacy infrastructure.
- **Utilize segregation of duties to maximise resource utilization:** Similarly, transformation projects based around transactional system upgrades often pull IT staff into resource intensive projects with little breathing rooms for CIOs to use them elsewhere. A rational Cognitive Automation strategy with segregation of duties greatly improves resource allocation by keeping teams focused on transactional system upgrades and other teams resourced for different parts of cognitive transformation. This movement from monolithic projects helps create smaller, agile teams and smaller projects, a key development for IT organizations that want to adopt a continuous improvement model rather than the traditional multi-year model.

2.3 Report and Application Reduction

BI packages have clearly benefited organizations and represent a core part of an IT strategy. Yet every CIO recognizes that over years of deployments there's been an explosion of reports that have to be maintained. One of the benefits of Cognitive Automation is the digitization of decisions and the removal of manual activities and reports. A less obvious benefit of automating these decisions means that reports and applications that only served as interim decision assistance are no longer needed by the organization. For example, with automation around stock-out prevention and supply and demand matching, organizations that had reports around overnight stockout reports no longer become necessary.

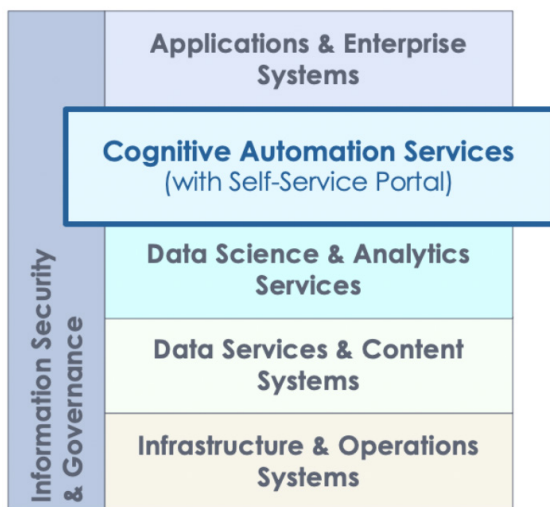


With Cognitive Automation in place, you can systematically retire reports and apps.

- **Analytics:** Apps or spreadsheets that do offline calculations for use in manual decisions. Generally a widely used spreadsheet with macros is a sign of a legacy application or workaround.
- **Visibility:** Reports mainly used in process meetings or purely to assist decisions should either be integrated with the Cognitive Automation platform (as part of the previously discussed glass-box approach) or retired completely.
- **Modeling:** Any previously stand-alone modeling tool should be either integrated into Cognitive Automation or retired. The tight coupling of data, analytics, and decision processes of Cognitive Automation make modeling activities much more effective than non-integrated modeling. For models that make sense as stand-alone packages, look to leverage inherent API integration points available in Cognitive Automation.

3. MAXIMIZING VALUE OVER TIME

In the previous section, we focused on a practical step-wise approach to Cognitive Automation as a short-term way to align technology spend with business value; but one of the biggest potential gains for organizations to realize is building these capabilities as a platform that can serve as an asset for IT. In this section we'll outline how a CIO can lead an organization into developing Cognitive Automation services, similar to content management systems or DevOps systems that are now a regular part of IT services.



A well-implemented Cognitive Automation solution can give the business tremendous flexibility in digitizing decisions. While every organization has its own flavor of IT services, the illustration at left shows one variation where Cognitive Automation Services enable the centralization of cognitive processes and flows that are leveraged across the business and across multiple groups. A self-service portal with deep role-based access not only enables teams to create their own apps, but also enables interfacing with your other IT teams.

For CIOs, the challenge is now to build this capability in the most practical and effective way possible. The following sections provide recommendations on how to do exactly that.

3.1 Think Long-Term; Execute Near-Term

During your first implemented use cases, you will likely deploy them through Aera Technology or another trusted third party. As a natural part of this deployment, you will have a core set of users who become more familiar with the application. You will want to consider staffing your internal teams with team members with project management experience and the leadership abilities to guide the progressive integration of the capabilities within the organization. A good team will think about replicability to these projects, ideate around potential other applications, and serve as pathfinders in your future Cognitive Automation projects.

3.2 Gradual Integration of IT Teams with Cognitive Automation

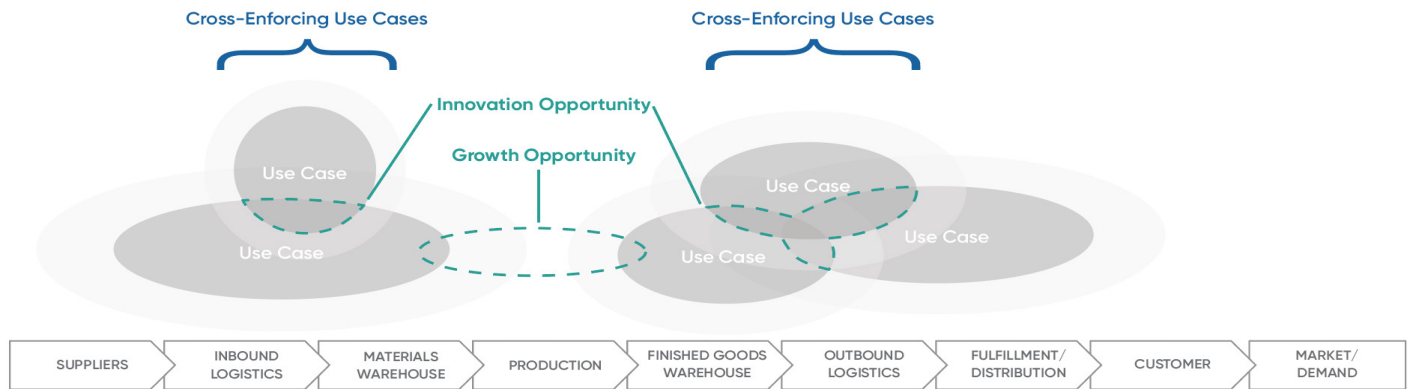
Once the first few use cases are deployed, most organizations begin taking a more hands on development with cognitive automation. Beyond the normal core teams working with your external deployment partners, there are generally two teams that become much more engaged:

- **Data Science Teams:** When a Cognitive Automation platform has an open approach, it makes sense to actively involve data science teams across your various use cases. You'll find places for your teams to integrate existing data science projects in some use cases, or data scientists will want to explore writing their own models to augment those use cases. Either way, it's a natural way to augment data science teams and begin getting more power out of your Cognitive Automation platform.
- **Analytics Teams:** Data analytics teams tend to be one of the first to immediately grasp the opportunity Cognitive Automation offers, given their familiarity with the challenge related not only to data, but where the business is struggling to get the information they need to effectively make decisions. There are two immediate benefits to involving these teams early in the Cognitive Automation journey: a) these team members are often quickest to train on Cognitive Automation given their existing skill set and b) they provide very quick clarity on where Cognitive Automation can have immediate value and where analytics can benefit from interfacing with the platform (for example, pulling predictive models into existing projects that might be faster in Cognitive Automation, or where Cognitive Automation is providing a missing data from harmonization process).

3.3 Developing Dedicated Cognitive Automation Teams

After an organization has several use cases, there is a natural point where it makes sense to have dedicated teams to design, build, and maintain your company's developed skills. That being said, there are three main factors that drive the formation of these teams:

- **Cognitive Automation as a Significant Part of the Business:** The most obvious driver to form these teams is when Cognitive Automation is taking thousands of decisions every day for significant parts of the business. At this point, there exists a significant history of decisions from which these teams can further refine and optimize these skills, and is where having in-house talent makes natural sense.



- Overlapping Use Cases for Innovation:** As mentioned earlier, Cognitive Automation use cases adjacent to one another tend to re-use overlapping data, process, and cognitive processes. At this point internal teams will tend to see opportunities to both cross-connect skills to get richer decisions as well as leverage extensive historical data in these areas to do deeper data science analytics. In some cases, there may be ways to integrate these data sets with other existing projects. For example, a cluster of use cases in demand planning and promotion optimization could help augment projects in sales or marketing initiatives.
- Connecting Use Case Islands for Growth:** When organizations look at what data, process, and cognitive analytic objects are used in the organization, there will be times when some cluster of use cases don't overlap. This isn't unusual given that use cases often prioritize around specific business needs. While use cases can be solved with Cognitive Automation around its immediate part of the supply chain, nearly all use cases operate best when considering full end-to-end connections. Organizations with dedicated Cognitive Automation expertise will actively connect use cases that can not only grow those use cases, but use the active connections between use cases islands to cross connect objects, processes, and cognitive analytics. For example, an available-to-promise (ATP) use case can be solved focusing from manufacturing to fulfillment, but connecting it through to supply (manufacturing prediction, BoM explosion, supply material inventory prediction, procurement automation) provides deeper granularity and extends ATP to capable-to-promise.

Following this blueprint enables CIOs to build a strong service-based organization with innovation teams who are experts in this brand new domain of Cognitive Automation.

CONCLUSION

CIOs with a long-term view of the role of Cognitive Automation can implement this disruptive technology without the traditional burden of monolithic software projects that soak up budgets and IT staff time. By looking at Cognitive Automation as an overlay technology leveraging your existing IT stack, you can evolve your IT capabilities in a way that provides returns to the business at each step along the way. With an eye towards core cognitive capabilities, CIOs can grow core staff capabilities aligned with the value to the business. The end result of this journey is not only the evolution of capabilities, but also the enablement of your business users to evolve their own roles as the business automates thousands of daily repetitive decisions. Let machines do what machines do well, and free humans to do what humans do well—innovate, create, and adapt.

About the Company

Aera Technology delivers the Cognitive Operating System™ that enables the Self-Driving Enterprise™. Aera understands how businesses work; makes real-time recommendations; predicts outcomes; and acts autonomously. Using proprietary data crawling, industry models, machine learning and artificial intelligence, Aera is revolutionizing how people relate to data and how organizations function.

Understand.

Continuously crawls enterprise systems and provides end-to-end visibility

Secure, low impact, and programmable Crawlers

Internet-scale data management and processing

Data indexed for search

Recommend.

Suggests ways to improve financial and operational performance

Opportunity and risk analytics

Analysis at any granularity

Predict.

Leverages real-time data and AI to accurately predict business outcomes, risks, and opportunities

Embedded AI and machine learning

Act.

Proactively engages relevant users and drives the execution of their decisions

Autonomously take action

Pre-defined process library

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