Zenotris
Process Intelligence

OPERATIONS RESEARCH
2026 EDITION

ZENOTRIS · PROCESS INTELLIGENCE

The State of Operations

Optimization, 2026

Spending on process visibility is surging. Most of the value is still trapped — here is where it hides, and how to release it.

A research paper for operations leaders

Manufacturing · Healthcare · Hospitality · Logistics

EXECUTIVE SUMMARY

More is spent on seeing operations than ever — less is banked from fixing them

Process-mining and automation budgets are climbing fast, yet the cost of inefficiency has barely moved. The reason is simple: buying a tool is not the same as changing a process. This paper reads the 2026 landscape through four findings and closes with a practical field guide for operators who need enterprise-grade results without enterprise-scale tools.

SPENDING ON VISIBILITY

↑ 30%+

annual growth in process-mining software spend, 2024 — Gartner

VALUE ACTUALLY BANKED

1 in 4

organisations have moved >40% of automation pilots into production — Deloitte, 2026

20–30%

of annual revenue lost to operational inefficiency

INDUSTRY ESTIMATE

25%

of large enterprises on a process-mining platform by 2026

GARTNER

46%

rank process automation a top-two investment priority

DELOITTE 2025

43%

of COOs name data quality their top data priority

IBM IBV 2025

IN THIS PAPER

01 FINDING

The inefficiency tax nobody books

Rework, manual handoffs, fragmented systems and dirty data quietly take a share of every order.

Independent estimates put the revenue lost to operational inefficiency at **20–30% a year**; Bloomfire's 2025 enterprise-intelligence study independently lands at roughly a quarter of annual revenue. The number is large because the cost is everywhere at once.

It rarely shows on a report, because no single line item carries it. It surfaces instead as missed delivery windows, expedited freight, returns and the month-end firefighting everyone treats as normal. For a mid-market operator the tax is heavier per pound of revenue than for the enterprise next door — the same broken processes, a fraction of the tooling budget, and no dedicated process team to hunt the leaks.

EXHIBIT 1

Where the inefficiency tax hides

Rework
the same case touched twice

Manual handoffs
waits between systems and teams

Fragmented systems
ERP, WMS and tickets disconnected

Poor data quality
dirty timestamps, wrong fixes

The four leaks behind most of the tax. Source: zenotris analysis.

> *"More than a quarter of organisations lose over $5M a year to poor data quality alone."*
>
> IBM Institute for Business Value, 2025 — 43% of COOs name data quality their top data priority

02 FINDING

Everyone is buying visibility

The market's answer has been to buy the ability to see. Demand is real — the question is what happens next.

Process-mining spend has grown at double-digit rates for three straight years, and Gartner expects a quarter of large enterprises to run a platform by 2026 as a first step toward a digital twin of their operations. Automation now sits on the board agenda: nearly half of operations leaders rank it a top-two investment priority for the next two years.

EXHIBIT 2

The visibility boom, in three steps

2023	2024	BY 2026
+39.5%	+30%+	25%
process-mining spend growth	growth held above 30%	of enterprises on a platform

Source: Gartner. The tools work — the open question is what happens after the dashboard lights up.

03 FINDING

The execution gap is where the money leaks

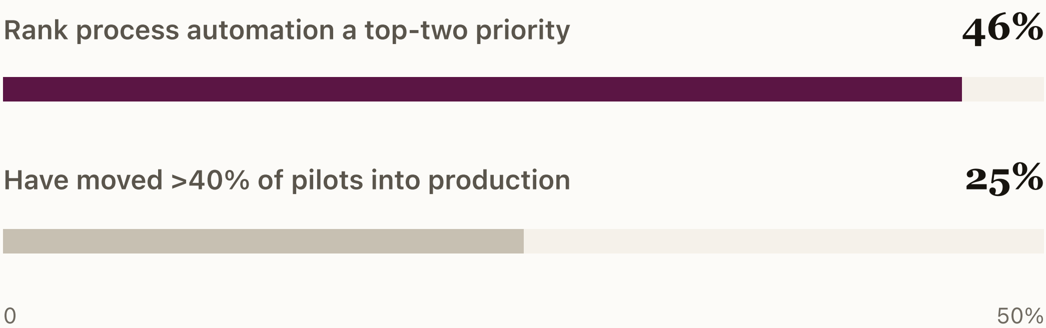
The distance between buying a tool and banking a result is the defining problem of 2026.

Deloitte's 2026 State of AI finds only a quarter of organisations have moved more than 40% of their pilots into production. The rest stall in a slide deck. A chart that shows the bottleneck does not remove it: visibility without a change to the process, the incentives and the data underneath it is a report nobody acts on.

That makes it an execution problem, not a software one — and execution is where a consulting-led approach beats another licence. Someone has to own the loop, change it, and prove the number moved.

EXHIBIT 3

Intent to automate far outruns execution



Source: Deloitte Smart Manufacturing 2025 (priority); Deloitte State of AI 2026 (production).

> *"A dashboard that shows the bottleneck does not remove it."*

04 FINDING

The mid-market is underserved by design

Enterprise platforms are priced and staffed for the Fortune 500. The firms with the sharpest need have the fewest options.

Mid-market operators — 50-to-500-person plants and their equivalents in healthcare, hospitality and logistics — are the fastest-growing segment for automation adoption, yet they carry the same inefficiency tax with a fraction of the budget and no in-house process team. The platform built for the enterprise is the wrong shape for them.

They do not need another subscription plus the people to run it. They need the outcome: recovered margin, fewer missed windows, higher throughput. That gap is the reason this paper exists.

EXHIBIT 4

The mid-market squeeze

WHAT MID-MARKET OPS NEED	WHAT THE SOFTWARE MARKET SELLS
Enterprise-grade results	Enterprise pricing
Recovered margin, fewer missed windows	A platform subscription
A fix — owned and costed	Plus the team to run it

Source: zenotris analysis.

05 PLAYBOOK

Five moves that release trapped value

A sequence, not a menu.
Each move funds the next.

1 **Start from the money, not the map**

Pick the one process where a five-point improvement is worth the most — order-to-cash, procure-to-pay, dispatch — and baseline it in currency, not swimlanes.

2 **Mine the event log you already have**

Your ERP, WMS and ticketing systems already record every step and timestamp. You rarely need a new platform to see where cases stall — you need the log read correctly.

3 **Fix the data before the dashboard**

Poor data quality is the top operations-data priority for 43% of COOs. A model built on dirty timestamps recommends the wrong fix with total confidence.

4 **Change one loop, prove it, then scale**

The pilots that reach production are scoped to a single decision loop with an owner and a number. Prove one, bank the saving, fund the next from it.

5 **Buy the outcome, not the licence**

For a mid-market team, a fixed-scope engagement that returns the recovered margin is faster and cheaper than a platform subscription and the headcount to operate it.

06 EVIDENCE

Outcomes from the field

The register operations work should be measured in.

£1.2M recovered in a single order-to-cash cycle	**27%** fewer missed delivery windows	**41%** throughput gain on a constrained line

Illustrative results from zenotris engagements. Not presented as survey data.

METHODOLOGY & SOURCES

This paper synthesises published 2025–2026 research from Gartner, IDC, Deloitte and the IBM Institute for Business Value with zenotris's own consulting observations across manufacturing, healthcare, hospitality and logistics. Market figures are attributed below; outcome figures are illustrative, drawn from zenotris engagements.

1 Gartner — process-mining software spending growth (2023–2024) and enterprise adoption forecast to 2026, via Process Excellence Network coverage of the 2025 Magic Quadrant for Process Mining. processexcellencenetwork.com

2 The 20–30% revenue-loss range is a widely cited industry estimate (commonly attributed to IDC). As the primary report is not readily locatable, it is presented here as an industry estimate rather than a single-source citation; Bloomfire (below) independently corroborates the magnitude.

3 Bloomfire — *Value of Enterprise Intelligence 2025*: inefficiency costs a business ~25% of annual revenue.

4 Deloitte — *2025 Smart Manufacturing and Operations Survey*: 46% rank process automation a top-two investment priority. deloitte.com

5 Deloitte — *State of AI in the Enterprise 2026 ("The Untapped Edge")*: only 25% of organisations have moved more than 40% of AI pilots into production. Survey of 3,235 director- to C-suite leaders across 24 countries.

6 IBM Institute for Business Value, 2025 — 43% of COOs name data quality their top data priority; over a quarter lose more than $5M a year to poor data quality.

WORK WITH ZENOTRIS

Where is your trapped value?

Zenotris runs a fixed-scope operations diagnostic: we baseline your highest-value process in currency and hand back a costed fix list — the recovered margin, named and owned. Enterprise-grade results, without the platform overhead.

Book an operations diagnostic

Zenotris Process Intelligence

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