

Impact AI Series

Enterprise AI Maturity Index 2025

In partnership with  OXFORD
ECONOMICS

By Vijay Kotu, Richard McGill Murphy, Brian Solis, and Dorit Zilbershot



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Introduction



Richard Murphy

Head of
Global Thought
Leadership
Research,
ServiceNow

For our second annual Enterprise AI Maturity Index, we surveyed private and public sector leaders worldwide to measure progress on their AI journeys. The results surprised us. This year's average maturity score has declined significantly—9 points—from last year. Fewer than 1% of respondents scored over 50 on our 100-point AI maturity scale. The highest score fell a whopping 13 points year on year.

These sharp drops suggest that AI innovation is outpacing organizations' capacity to deploy AI effectively at scale. There's a vision gap at the top, as leaders struggle to set audacious AI goals while also driving measurable results. Organizations understand they must foster an innovation-forward culture to get ahead. But many lack the proper guardrails needed to innovate safely at scale.

We identified an elite cohort of Pacesetter companies that are leading the pack across all dimensions of AI maturity. We modeled the potential economic impact if all companies on the Forbes Global 2000 list were Pacesetters. In aggregate, this could produce a \$113 billion increase in total gross margins across all Global 2000 companies.

In this report, we provide a view from halfway up the AI summit. We show how AI Pacesetters are leveraging AI by connecting data, automation, and workflows. Then we offer a roadmap for how any organization can deploy AI, govern it, and measure ROI in ways that benefit customers, employees, and the bottom line.

Our key takeaways: Agentic AI is enabling enterprises to deploy autonomous software agents that collaborate with other agents in pursuit of defined goals. The right leadership strategy and platform are essential to success. And in the age of AI, human talent and creativity are more important than ever.

Section 1

The AI-driven future

AI maturity is a moving target

When we fielded the first AI Maturity Index study in early 2024, organizations were just coming to grips with the potential of generative AI to deliver better, faster experiences for customers and employees. One year later, emerging tools such as agentic AI are taking transformation to the next level.

On the one hand, that's excellent news for organizations. Emerging AI technologies are already delivering measurable value, and organizations are enthusiastic about embracing AI across the enterprise. On the other hand, the rapid pace of innovation is leading to a decline in AI maturity.

To track the state of AI maturity across the globe, Oxford Economics and ServiceNow surveyed just under 4,500 executives worldwide and measured organizational performance across five pillars of AI maturity:

- AI strategy and leadership
- Workflow integration
- Talent and workforce
- AI governance
- Realizing value in AI investment

Based on survey responses, we assigned each organization an overall AI maturity score between 0 and 100. Last year's maturity scores were low across the board. This year's scores are lower still. However, organizations that we call Pacesetters are ahead of the pack and have the ROI to show for it.



Glass half full

Importantly, our research findings don't spell doom for the enterprise. While overall AI maturity levels have dropped, AI is generating meaningful returns for nearly every organization we studied. More than two-thirds of them (67%) say AI has increased their organization's gross margin. Collectively, those executives indicate it increased an average of 11%.

Regardless of use case, AI provides ROI for most organizations, with nearly half reporting "significant" ROI for search functions, analytical AI, process AI, and predictive tools. Executives expect their organization's investment in AI to increase by about 8.6% on average in the next fiscal year.

And while our Pacesetters are not immune to the maturity slowdown, they are still well ahead of the pack when it comes to deploying AI productively at scale. Their approach to AI holds valuable lessons for all organizations.

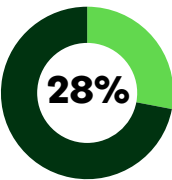
Early days for agentic AI

Agentic AI—a type of artificial intelligence that acts autonomously in pursuit of defined goals—has emerged as the next big thing in tech. Executives are excited about its potential to boost productivity across the enterprise.

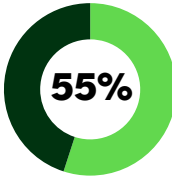
However, only about one third of respondents have reached at least the piloting stage for any agentic AI use case. Those who have started to implement agentic AI are already seeing gains. Top use cases include addressing security risks and monitoring/interacting with internal systems.

About 40% of executives are considering adding agentic AI tools to their tech stack within the next 12 months, but most feel they lack the proper governance guardrails to do so successfully.

Agentic AI uptake is low at this point...

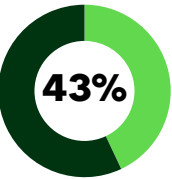


are very familiar with agentic AI

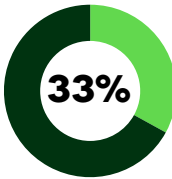


are somewhat familiar

...but many organizations plan to accelerate adoption



are considering adopting agentic AI in the next 12 months



are piloting their first use cases or have at least one fully functioning use case



Chris Bedi

Chief Customer Officer and Enterprise AI Advisor, ServiceNow

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To realize the full power of AI, think of it as a spectrum from incremental outcomes through exponential results. Along this spectrum are three levels of AI.

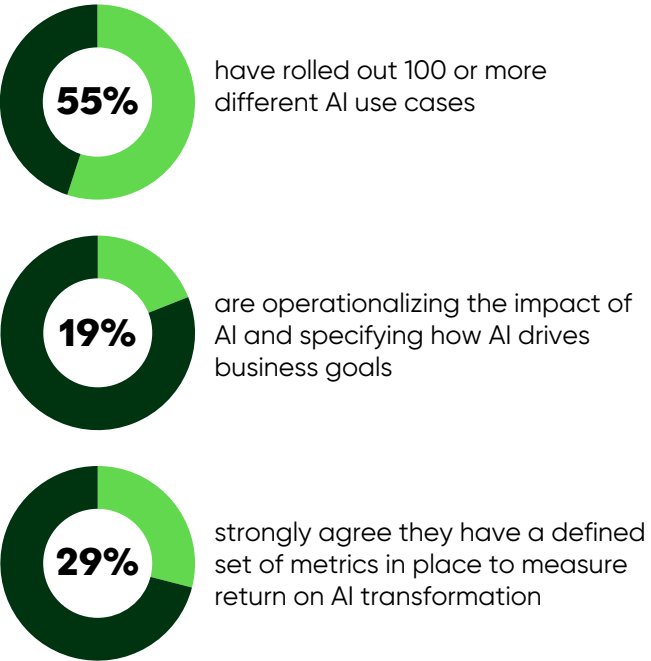
- Analytical AI predicts a numerical outcome or recommends a particular action based on specific, single-focused tasks, such as a chatbot.
- Generative AI generates content in response to natural language prompts, such as generating case resolutions, emails to prospects, or code.
- Agentic AI creates an orchestration layer across an enterprise that acts autonomously and proactively makes decisions to execute material business activities through end-to-end workflows.

Incremental forms of AI are an important advance in technology. They show up in nearly every piece of software we use. But to reap the exponential rewards AI can offer, companies must adopt all three levels of AI and embed them within a platform that can take action in pursuit of defined goals.

Rapid change brings challenges

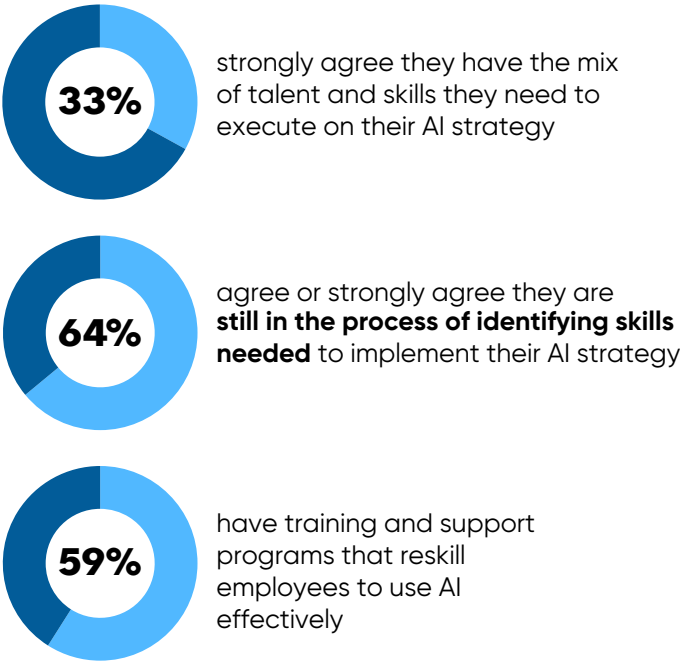
Measurement struggles persist

AI is changing faster than executives can develop strategies to harness it. Few leaders have a concrete idea of how to implement AI in their organization by connecting business strategy to technology strategy.



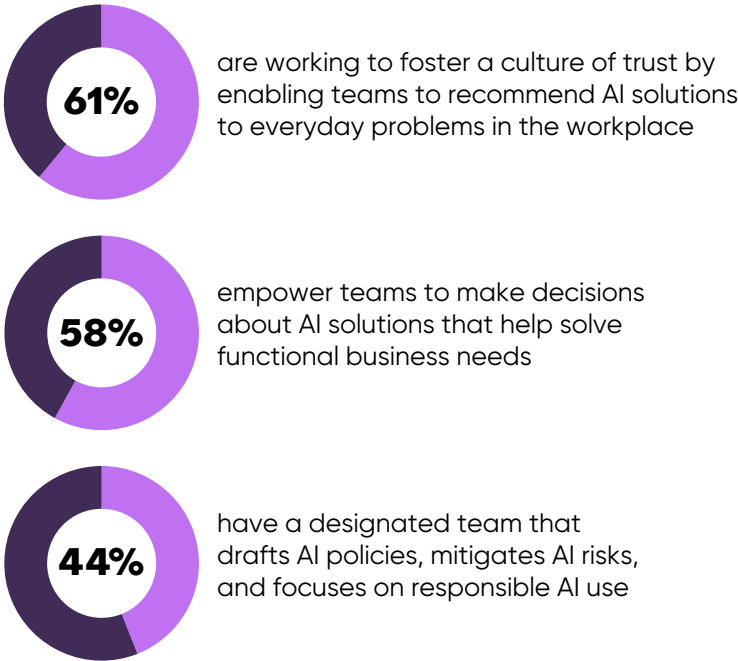
Good help is hard to find

Human talent is critical for transforming AI from a novel gadget into a mission-critical tool. However, organizations are still struggling to find the right talent to get the job done. Key challenge: It's not always clear what skills people need to work effectively with AI.



Innovation requires governance

Many enterprises are driving AI adoption by encouraging their employees to experiment with AI. This creates potential risks, given most enterprises surveyed also say they don't yet have the right guardrails in place to govern AI effectively.



Pacesetters do it differently

Defining Pacesetters

An elite cohort that we call “Pacesetters” is outperforming the rest of the group. While this year's average AI maturity score is 35, Pacesetters averaged a score of 44. A tiny fraction of those we surveyed, under 1% of the sample, scored over 50.

Pacesetters make up just 18.2% of respondents. However, by adopting the Pacesetter roadmap, any organization can enter their ranks.

The top performer in this year’s AI Index survey scored just 57.9, which is 13 points lower than last year's high score. The takeaway: Even the most advanced enterprises are still in the early stages of AI transformation. Organizations still have time to close the gap by following the Pacesetter roadmap.

Extent that organizations’ AI solutions have achieved target outcomes

Improved experiences



Increased efficiency/productivity



Ability to innovate faster



What if all companies were AI Pacesetters?

We created an economic model to measure the potential benefits to Forbes Global 2000 companies if they all achieved Pacesetter levels of AI integration. We also estimated how different dimensions of the AI Index contribute to the correlation between profitability and index scores.

The Forbes Global 2000 list includes the world's biggest companies measured by sales, profits, assets, and market value. If every Global 2000 company became a Pacesetter, there could be a \$113 billion increase in total gross margins across the entire population. On average, each Global 2000 company could see an increase of \$56 million in gross margin.

By isolating the correlation between each dimension and the financial gains from AI maturity, we found the following three dimensions to be the greatest contributors to the potential \$113 billion boost in profitability:

36%

Leadership

30%

Governance

23%

Spending

The two dimensions most strongly correlated with profitability are leadership and governance, driving home the importance of vision and guardrails in achieving AI maturity.



Section 2

Pacesetters lead the way

The Pacesetter roadmap



Lead with an innovation mindset

53% of have made significant progress creating an AI innovation center, versus 38% of others

Take a platform approach

66% employ a platform approach, versus 46% of others

Focus on talent

50% strongly agree they have the right talent mix, versus 29% of others

Prioritize AI governance

63% have addressed evolving data governance and data security needs and created AI-specific policies, versus 42% of others

Embrace agentic AI

36% are currently using agentic AI, versus 19% of others

Pacesetters lead with an innovation mindset

Pacesetters use AI to explore possibilities that humans couldn't achieve without AI, and outcomes that AI couldn't achieve without humans. Unlike digitization, which mostly solves yesterday's problems, this AI-first mindset reimagines capabilities, outcomes, business models, products, services, and experiences. AI-first organizations see everything differently, from the problems they identify to the outcomes they seek.

For our Pacesetter cohort, AI is also a decision-making flywheel. Nearly 60% of them use AI to generate leadership insights, compared to just 23% of others.

Becoming an AI-first business means redesigning workflows so that intelligence flows seamlessly and enhances every operation. It means piloting next-generation AI solutions and exploring new possibilities to create value. It means envisioning future opportunities to augment human intelligence within the enterprise, and adopting an intelligent, connected platform that connects data, people, and processes.

By embracing an AI-first mindset, Pacesetters break free from linear progress and achieve new levels of performance, output, and effectiveness.

Strategy and outcomes progress

Significant progress made or strongly agree

Gross margin has increased because of AI



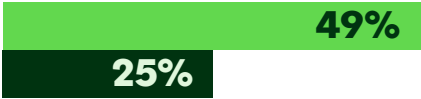
Strongly agree they are operating with a clear, shared AI vision



Significant progress establishing an AI innovation center



Strongly agree they have a defined set of metrics



Takeaways

Develop an AI vision and prepare for the future

Take a strategic approach to AI implementation that emphasizes a strong vision anchored in clear metrics.

Partner with AI stakeholders to build an innovation center

Innovation centers enable Pacesetters to quickly and securely experiment with new technologies. This is a key part of organizational agility.

Employ AI applications that span multiple business areas

Compared to others, Pacesetters are more likely to prioritize AI investments that supercharge more than one function, driving revenue while cutting costs.

MY TAKE

Humanize AI

**Brian Solis**

Head of Global
Innovation, Office
of Innovation,
ServiceNow

“

While AI can automate workflows and generate content, it is not capable of empathy or creativity. Humanizing AI transformation is crucial.

As you fine-tune your AI strategies and spearhead cultural adoption, consider three things.

Prioritize augmentation over automation. Do not think of AI as a replacement for human connection. Rather, think about it as a human collaborator. Leverage AI as a tool that can help humans build things that spark emotion, inspire trust, and foster relationships.

Use AI as a catalyst for human potential. AI can take human creativity, efficiency, and decision-making to the next level. Leaders who see AI as a force multiplier for creativity will drive more value than those who aim to replace employees with machines. Invest in your employees through reskilling and upskilling so they can work alongside AI rather than be displaced by it.

Take an AI-first mindset. Move away from a legacy mindset of merely iterating on yesterday's technologies to an AI-first one, which allows for true business transformation powered by innovative AI. Such a mindset allows leaders to dig deeply into the structure of their organizations and see, sometimes for the first time, the root causes of the obstacles they face and how to solve them. To get the most out of AI, it helps to have a single system that manages cross-functional workflows and optimizes for a world that is not constrained by human boundaries.

Pacesetters prefer platforms

A platform approach that leverages a single codebase makes it easy to manage the entire enterprise. Sixty-six percent of Pacesetters employ a platform approach with built-in AI capabilities across the enterprise, compared to 46% of others.

This approach makes it easier for Pacesetters to employ new AI tools such as agentic AI at scale, because they don't have to reinvent the wheel every time a new technology or application hits the market.

Pacesetters recognize the power of knocking down silos to allow data to flow between business functions, enabling every team to draw on a central repository of information.

They harness AI-powered digital workflows to connect people, data, and processes across the enterprise. As a result, 56% of Pacesetters have made significant progress connecting data and operational silos, compared to 41% of others. By taking this approach, Pacesetters can translate AI insights into concrete business outcomes.

“ AI is used to investigate workflows to identify bottlenecks and optimize processes.”

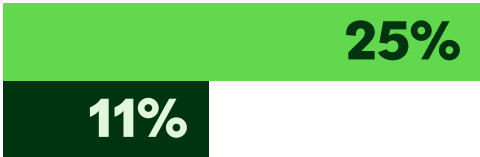
— Consumer Goods Manufacturer CHRO, Netherlands

Progress leveraging AI to improve work processes

We have integrated workflows between my direct team and other business functions and streamlined with AI



We have invented new workflows across business functions where human and AI collaboration make work more efficient



Pacesetters
Others

Takeaways

Bust silos

AI can't transform your organization if it's confined in discrete functions. Start busting those silos by looking for opportunities to connect teams and processes across the organization.

Dream bigger

With the advent of AI, many organizations are focused on identifying individual tasks that can be automated. While automating routine tasks is important, Pacesetters are more focused on building a holistic strategy for AI implementation. This approach might take longer to implement but can lead to greater gains down the road.

Partner with AI

A quarter of Pacesetters have focused on human/machine collaboration, leading to sharp efficiency gains.

“

A unified AI platform with one common data model means a unified management platform and interface. With that kind of end-to-end platform, it is amazing the amount of workflows you are able to create—be it technology, creator, finance and supply chain, employee, or customer. It makes it possible to build more and more capabilities, fast.

When AI is pervasive across the platform, it can get delivered to all the different workflows and applications without having to individually build it in.

— **Amit Zavery**, President, Chief Product Officer, and Chief Operating Officer, ServiceNow

MY TAKE

Integrate your data



Vijay Kotu

Chief
Analytics Officer,
ServiceNow

“

While making data-driven decisions is a common goal, don’t make the mistake of reserving data and analytics for high-level, quarterly boardroom strategy and planning alone. Empowering frontline employees to incorporate data into routine tasks can significantly impact your entire organization. Want to take a step further? Feed data to Agentic AI to augment decision-making in the organization.

The ultimate aim of analytics is to transform insights into action. One of the best ways to achieve this goal is by automating workflows wherever possible. AI + Data + Workflow automation allows teams to operate more efficiently by reducing manual tasks and decision-making, enabling greater productivity without added effort.

Centralizing proprietary data is a smart first step to running AI effectively across the organization, but value multiplies when the organization integrates extra data sources. Combining multiple data streams leads to deeper insights about customers, employees, and products, helping to drive better business decisions.

Pacesetters focus on talent

To prepare for the future, Pacesetters ensure they have the right talent in place. In addition to hiring, they're also training and upskilling existing employees. Half of all Pacesetters (50%) say they have the right mix of talent to execute on their AI strategy, compared to 29% of others.

Fostering a culture of collaboration and autonomy empowers employees. About 70% of Pacesetters say they work to promote cross-functional alignment across the enterprise, while 71% say they empower teams to make their own decisions about how AI can improve their work, versus 55% of others.

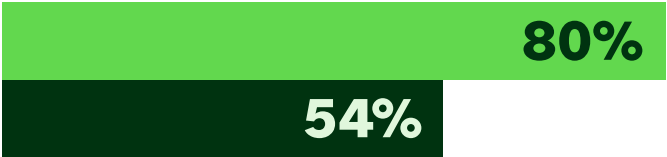
With technology changing by the minute, every organization is grappling with a talent shortage and scrambling to find the talent they need to execute their AI strategy. However, Pacesetters are doing better than others.

“ AI is used for assessing employee skill sets and recommending professional development opportunities.”

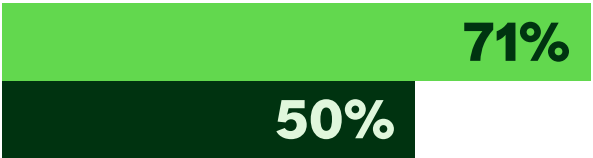
– Insurance Director, UK

Pacesetters take a multipronged approach to help employees use AI effectively

Training and support to upskill



Host AI learning events



Identify AI champions



Takeaways

Future-proof your workforce

Change is a strategic process—not necessarily something that happens to organizations, but something that organizations do. Change agents manage major organizational shifts and ensure culture, vision, and goals are all aligned. Forty-five percent of Pacesetters are hiring change agents, compared to 36% of others.

Train current employees

All organizations can learn from how Pacesetters train, upskill, and reskill current employees. Pacesetters are especially keen on training AI configurators, data scientists, experience developers, and machine learning engineers.

Foster an AI-forward culture

Training alone isn't enough. Pacesetters find creative ways to help employees use AI effectively. For example, 64% of Pacesetters employ AI champions and 71% host AI learning events to get employees excited and up to speed.

Pacesetters prioritize AI governance

To succeed, organizations need to put guardrails around experimentation. An effective governance strategy mitigates risk while enabling employees to try out new, AI-enabled approaches to work challenges.

Compared to other respondents, Pacesetters take a more proactive stance on governance. A majority have already assessed AI applications for risk and worked to understand data privacy requirements, compared to under half of others.

Among Pacesetters, 63% have made significant progress addressing data governance and security issues with AI-specific policies, compared to just 42% of others. Half have implemented policies for data governance, privacy, lawfulness, and compliance.

“ AI is used to detect and analyze cybersecurity threats in financial networks.”

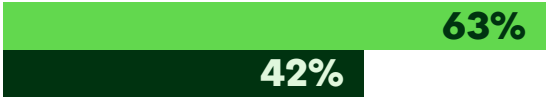
– Banking CIO, Germany

Strategies Pacesetters use to move the needle on governance (Significant progress)

Assessing potential AI applications and understanding data requirements



Addressing evolving data governance and security and creating AI-specific policies



Designating a team that drafts AI policies, mitigates AI risks, and prioritizes fair, transparent, and responsible AI use



Formalizing data governance and data privacy, lawfulness, and compliance



■ Pacesetters
■ Others

Takeaways

Address governance proactively

Ensure you have proper governance controls in place before deploying new AI tools. Once they are in production, build in a reactive governance approach for tracking, monitoring, and responding to AI risks.

Understand data requirements for AI applications

Organizations are onboarding more AI applications each year. When doing so, it's essential that teams understand where the data is going and what must be done to secure it.

Create AI-specific governance policies

Pacesetters know that drawing up policies that address AI governance head-on is crucial for maintaining data privacy and security.

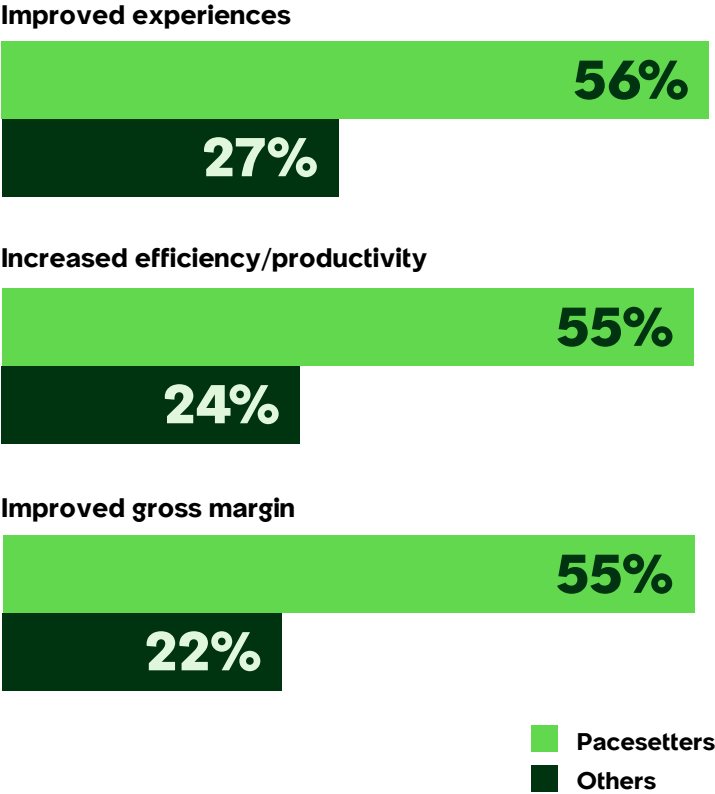
Pacesetters embrace agentic AI

Pacesetters are better prepared to embrace novel technologies such as agentic AI. Compared to others, they are already seeing greater ROI from their agentic AI investments.

Early adopters are achieving target returns at a higher rate than others. Organizations that harness agentic AI may see benefits such as better customer service and experiences, increased efficiency, and greater revenue. Leveraging a single platform can enable organizations to manage data, oversee their AI strategy, and identify quick wins. This might allow them to deploy agentic AI faster than competitors.

An integrated AI management system can quickly onboard agentic AI tools. Sharing access and workflows empowers various teams—everyone from data scientists to business leaders—to align AI deployments with business objectives.

Percent that have achieved significant measurable target outcomes



Takeaways

Get smart on agentic AI

Being well informed on new technologies is the first step. Pacesetters are more than twice as likely as others to be very familiar with agentic AI.

Identify quick wins

Look for low-hanging fruit to start capturing value from AI. Pacesetters are more likely to be using agentic AI to monitor and address cybersecurity threats, build bespoke products and services, and act on customer inquiries than their peers.

Orchestration of AI agents is key

Using orchestrator agents to manage AI agents can make it easier to oversee their work and to enable seamless collaboration across departments. Pacesetters are seizing this opportunity, as monitoring and interacting with internal systems is their No. 1 agentic AI use case.

MY TAKE

Agents need guardrails

**Dorit Zilbershot**

Group Vice
President, AI
Experiences
and Innovation,
ServiceNow

“

Specialized AI agents are purpose-built, intelligent systems designed to autonomously handle specific tasks within a function. However, in these isolated silos, they lack broader, holistic context, including how their tasks interconnect with organizational processes. As a result, their work can become fragmented. Moreover, when a single AI agent makes an error, it can have cascading effects that potentially disrupt operational workflows.

Effective orchestration of AI agents is key to scaling operations across complex environments. Unlike individual agents, orchestrator agents possess contextual intelligence, allowing them to understand broader systems and interdependencies.

This interconnected efficiency simplifies complex workflows and helps drive scale by automating tasks across functions—whether in IT, HR, customer service, supply chain, finance, or elsewhere. This also enables orchestrator agents to identify and isolate potential disruptions early on, strategically mitigating risk and preventing systemwide failures.

Agent orchestration introduces a new paradigm in how humans and machines collaborate. Instead of the traditional "human-in-the-loop" approach, where humans are deeply involved in every step, we shift to a "human-on-the-loop" model. Here, AI agents take the lead in executing tasks and making decisions autonomously. The human's role evolves to one of oversight and intervention, and only when necessary.

The autonomous capabilities of agentic AI, while a major draw, only increase the need for robust guardrails. The reality is that employees will still need to play a proactive role in reviewing and validating outputs, as well as scrutinizing the underlying processes and data sources that inform these outputs.

Section 3

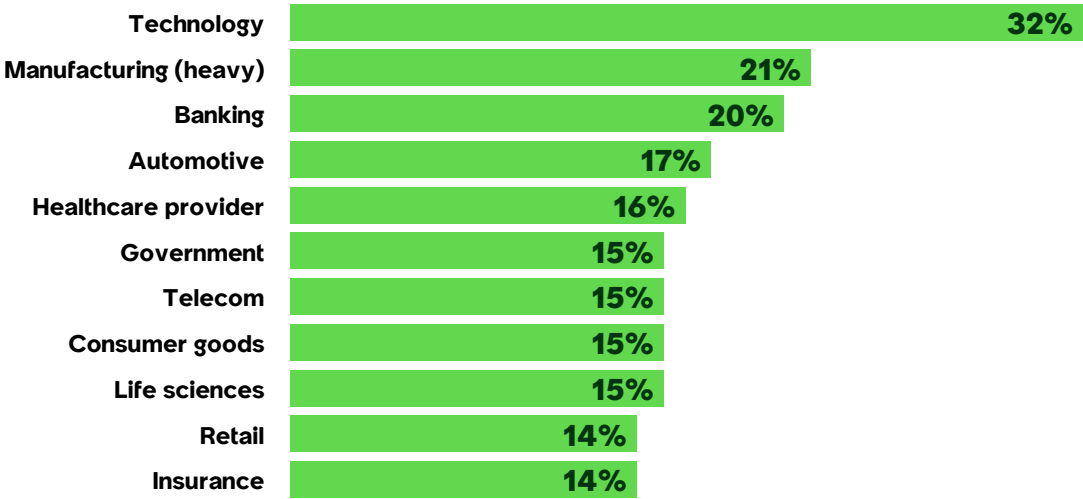
Industry and regional snapshots

Industry snapshot

Tech sets the pace

While there are moderate differences in AI maturity across industries, some industries have a noticeably higher percentage of Pacesetters. Technology organizations dominate, with 32% of respondents emerging as Pacesetters. That’s 11% more than heavy manufacturing (21%), the industry with the second highest count.

Percent of Pacesetters by industry



Takeaways

Data security is a top concern across all industries

Data security concerns rank as the No. 1 barrier to realizing AI value in all industries. Heavy manufacturing, technology, and retail are most focused on data security. Unsurprisingly, regulated industries such as banking, insurance, and the life sciences are highly focused on regulatory and compliance issues associated with adopting AI.

Agentic AI use cases vary

Agentic AI adoption varies across industries. For example, healthcare providers are less likely to have adopted it compared to tech organizations.

Tech enterprises are the most likely to have pilot or fully functioning agentic AI use cases for monitoring and addressing cybersecurity alerts. Governments lead in assessing non-cybersecurity-related business risk. Compared to average organizations in our study, tech organizations and banks are more likely to be piloting or deploying agentic AI for customer inquiries.

“**Personalized AI marketing initiatives significantly raised consumer engagement.**”

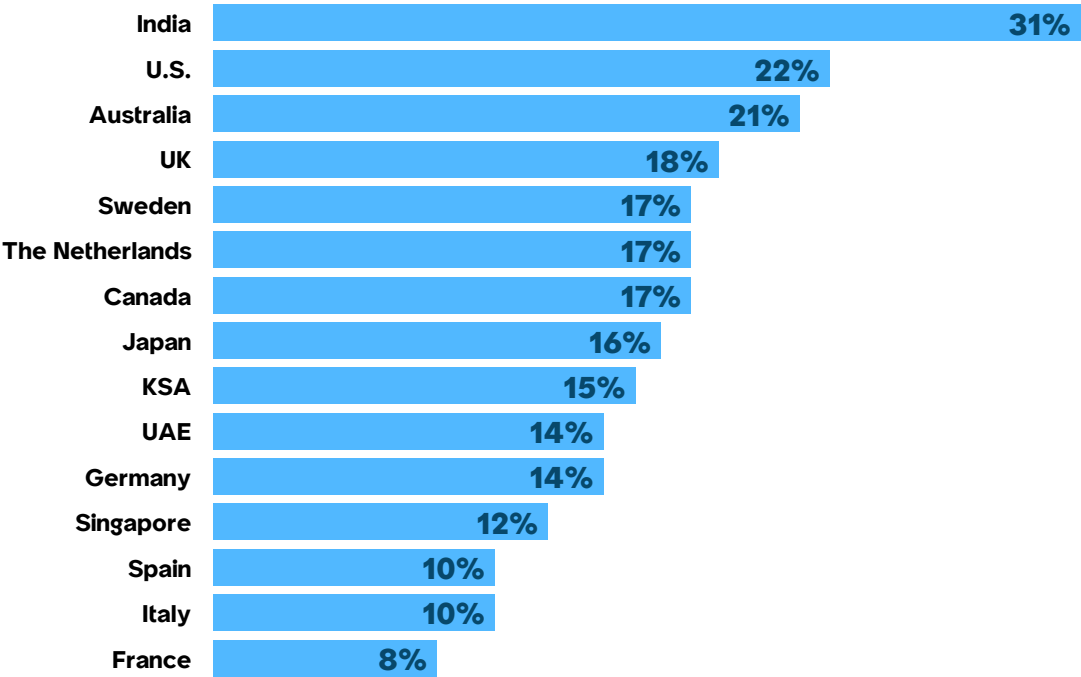
— Automotive Manufacturing CFO, Australia

Regional snapshot

India leads the pack

While Pacesetters can be found all over the world, some countries are further along in their AI journeys than others. India has the highest population of Pacesetters, followed by the U.S. and Australia. Spain, Italy, and France sit at the bottom.

Percent of Pacesetters by region



Takeaways

Governance gaps emerge across regions

Data security as a barrier to achieving AI value is felt most keenly in the UK, followed by the UAE and Italy.

Some countries are making strides toward robust governance. Australian and Indian respondents are most likely to strongly agree that they have addressed data governance and security issues and created AI-specific policies. Hong Kong, Japan, and Spain report less progress.

Talent and skills are not equally distributed

Organizations in India, the United Arab Emirates, and the UK are most likely to strongly agree that they have the right mix of talent and skills to execute their AI strategy. Those in France, Italy, and Spain feel less prepared.

Some are betting bigger on AI

A larger majority of organizations in India, the U.S., and the United Arab Emirates report they expect to increase AI investments in the next fiscal year.

“ AI automates task delegation to employees based on workload.”

– Insurance CFO, Spain

Section 4

Conclusion

Humans are the future

Becoming an AI-powered organization isn't just about deploying the right tech, the right governance framework, and the right success metrics. You also need to foster an employee culture anchored in values such as trust, collaboration, experimentation, and autonomy.

Here again, Pacesetters are ahead of the pack. In their approach to change management, they understand that trust, autonomy, and agility are paramount to the future of work and business. Even as they double down on machines, these organizations are keeping humans at the heart of everything they do.

AI-powered organizations will meet the challenges of the future by thinking strategically, experimenting boldly, and never losing sight of the human qualities that define us all—even, and especially, in the age of AI.



Section 5

Appendix

Survey demographics

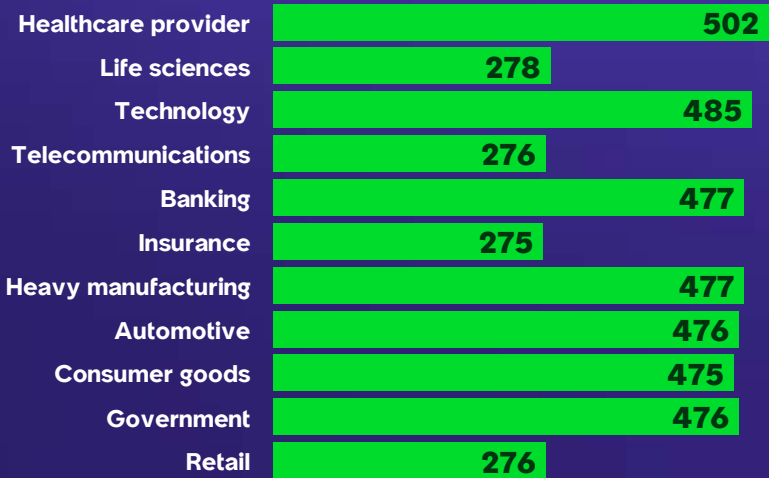


4,473
respondents

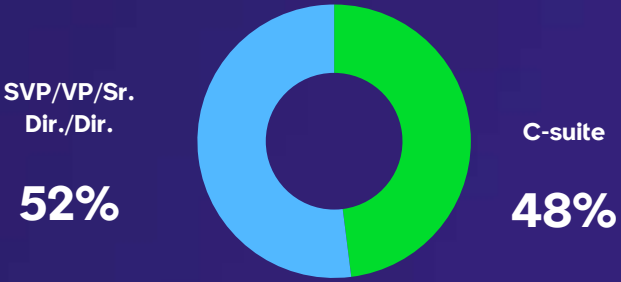
16
countries

11
industries

Industry



Role



Research methodology

This report represents year two of the Enterprise AI Maturity franchise. In partnership with Oxford Economics, we surveyed directors, senior directors, and the C-suite of 4,473 organizations in 16 countries around the globe.

The Enterprise AI Maturity Index is based on responses to our global survey, which we analyzed using statistical and econometric modeling techniques. The Index serves as a tool for organizations to better understand their performance in relation to others in their market or industry. Given these objectives, ServiceNow and Oxford Economics defined five dimensions of AI maturity: strategy and leadership, workflow integration, talent and workforce, AI governance, and realizing value in AI investment. Specific questions in the survey were written to understand organizations' maturity based on each of these dimensions.

We then calculated scores for the five dimensions using principal component analysis (PCA). PCA is a statistical method to simplify complex data from a large number of survey responses by transforming it into a smaller set of uncorrelated variables called principal components. PCA is widely used for dimensionality reduction in data analysis and machine learning and therefore lends itself well to index creation.

Using PCA to create an index has two main benefits:

- **Simplification:** PCA helps condense large amounts of information from different questions into a smaller number of key components. This helps generate an index without losing important details.
- **Objective representation:** PCA ensures that the index reflects the most important patterns in the data, without being influenced by any specific set of factors. This means the index gives a fair and accurate picture of responses, making it more reliable for decision-making.

The PCA scores are standardized on a scale ranging from zero to 100—with zero representing no enterprise AI maturity and 100 representing full enterprise AI maturity—to enable comparisons. The standardized scores for the five dimensions are then combined and equally weighted to generate a single Enterprise AI Maturity Index rating. The choice of equal weights reflects the researchers' view that all five dimensions are equally important in defining the AI maturity of an organization.

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Brian Solis is head of global innovation at ServiceNow. He is a sought-after keynote speaker and an award-winning author of eight bestselling books, including *Mindshift, X: The Experience When Business Meets Design, What's the Future of Business, and The End of Business as Usual*.



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