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Enterprise AI Maturity Index

2026

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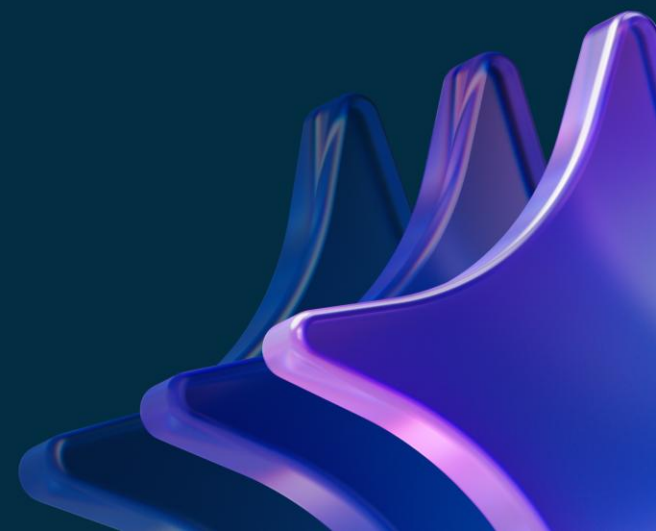
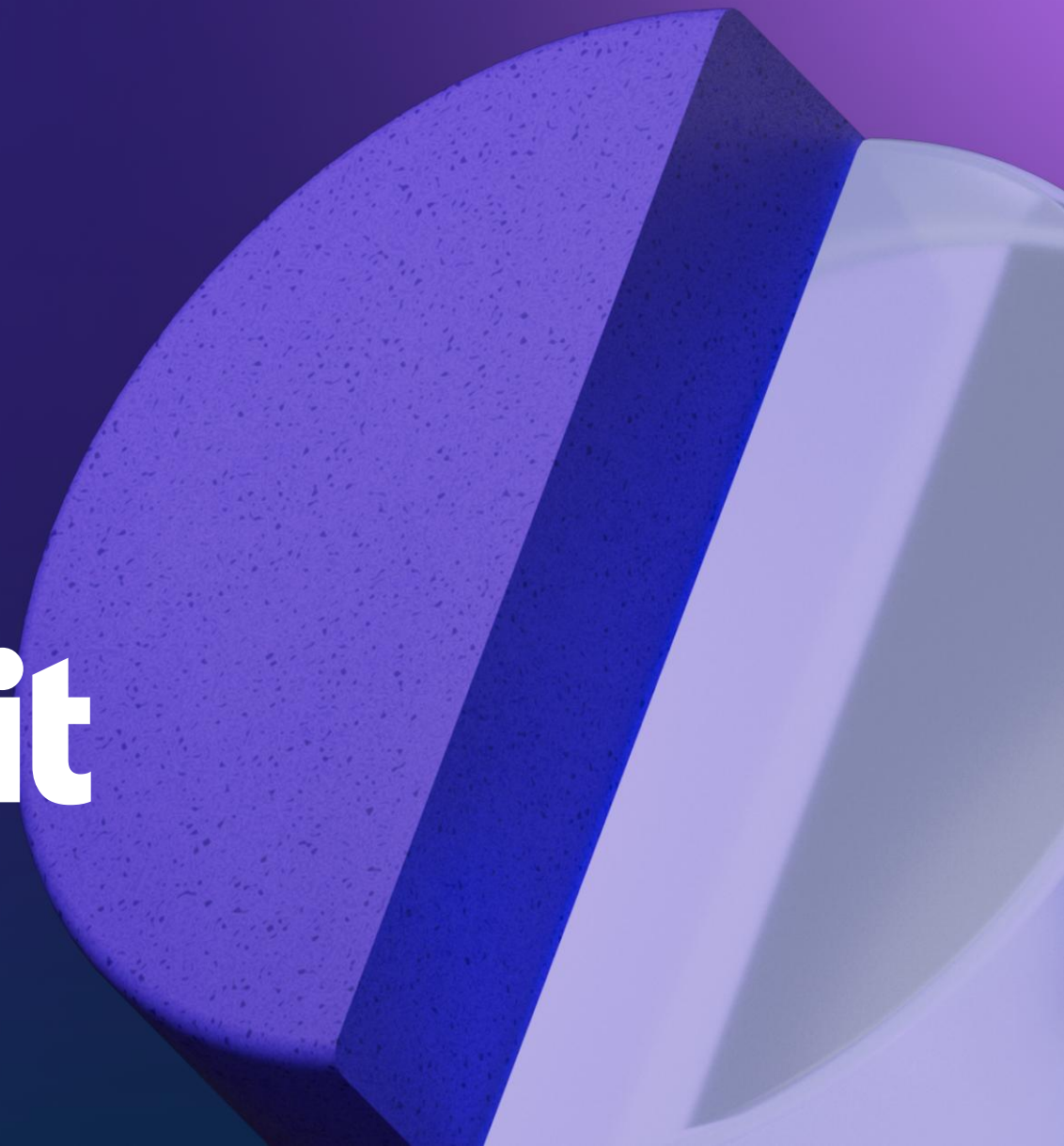


Everyone bought AI. Few built for it



Is the world getting better at AI?

For three years, we have been asking this simple question.

This year, the answer requires an honest look at what is actually happening underneath the covers.

AI spending is up 110%. Executive confidence has rebounded. Organizations have committed. By the surface measures, enterprise AI is moving fast. But beneath the momentum, the infrastructure required to execute AI at scale is largely not there. Data often sits in silos. Governance is frequently an afterthought. Investments remain fragmented. Point solutions are solving isolated problems. Pockets of progress don't connect.

Buying AI and building for it are not the same thing, and the gap between the two is where competitive advantage is won or lost.

What I have learned from working with organizations around the world is this: Technology matters only when it delivers real outcomes for real people. Not technology for its own sake. Outcomes. And the hard truth this research surfaces is that most organizations are still automating yesterday's work instead of reimagining tomorrow's.

The Pacesetters in this research took a different path. They unified their data, built governance in from the start, and invested in their people with ongoing upskilling, not one-time training. The returns justify every difficult decision it took to get there.

And here is what Pacesetters prove about what AI can be: When workers are freed from low-value, repetitive work, they focus on the problems only humans can solve. They build the relationships that drive real growth. They do the work that matters.

What follows is a rigorous look at what separates organizations being transformed by AI from those still running it on broken infrastructure. It is a roadmap built from what is working.

The foundation you build today determines the returns you realize tomorrow. We are just getting started.

Amit Zavery

President, Chief Product Officer, and Chief Operating Officer
ServiceNow

The gap between AI ambition and execution

When AI spending more than doubles in a single year, the question stops being whether organizations are committed. It becomes whether they're built for what comes next.

To find out, we partnered with ThoughtLab to survey 4,500 executives—and for the first time, 2,000 employees—across 19 countries and 12 industries.

We measured AI progress across seven pillars: vision and leadership, management and culture, data modernization, AI governance, talent and skills, AI-enabled workflows, and driving value from AI. Full methodology details are available in the appendix.

A small group made a different bet. Early.
While most organizations deployed AI into existing infrastructure and moved fast, a handful paused to ask a harder question: Are we building something that will scale or something that will break? That distinction is now showing up in the results—and the gap is widening. The organizations pulling ahead aren't those with the most advanced models. They're the ones with the infrastructure to execute reliably at scale.

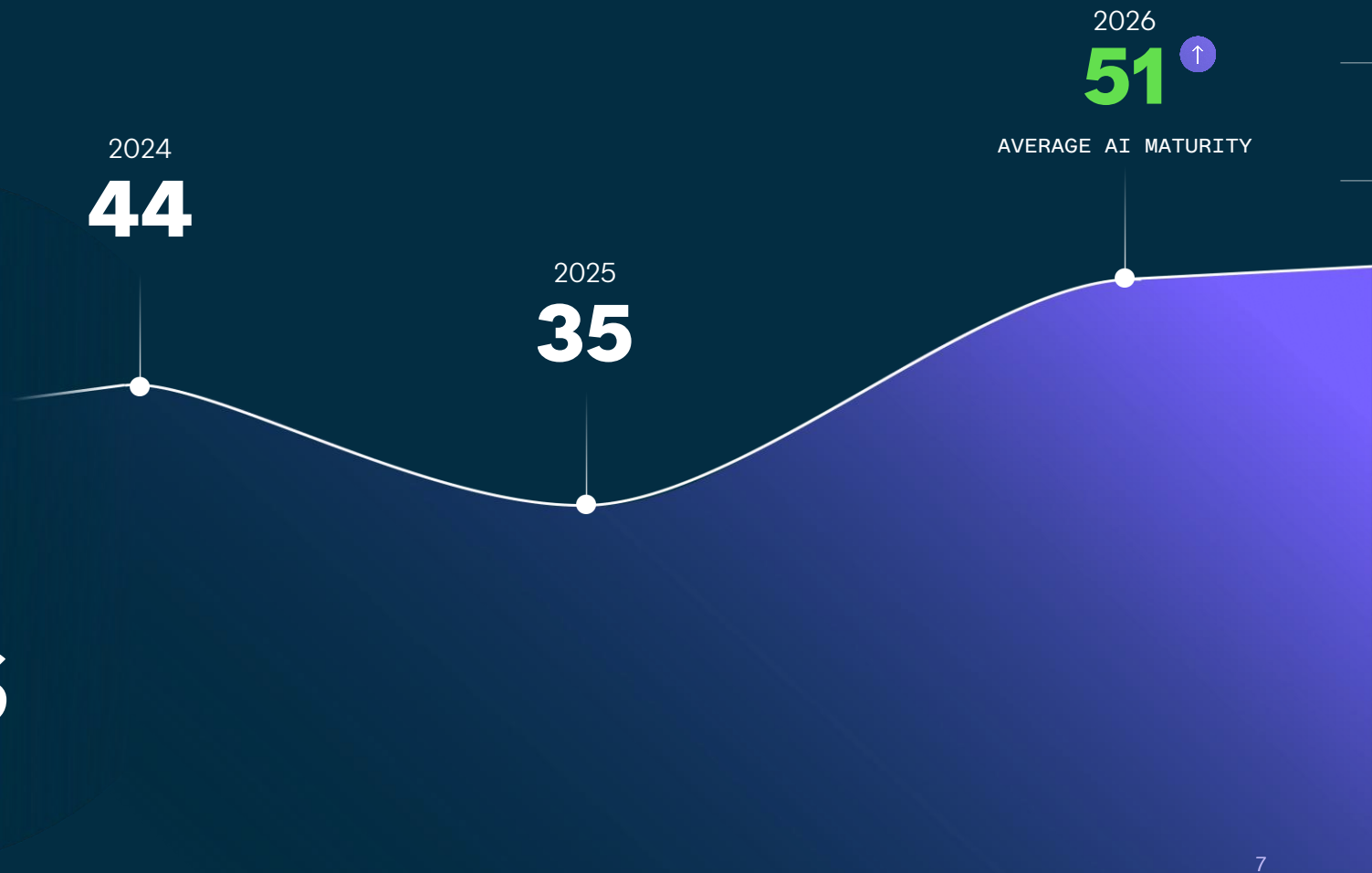
We call them Pacesetters, and what they do differently is a roadmap for others.
They represent 21% of this study's organizations. They are defined not by budget or industry, but rather by orchestration, connected data, and governance built before deployment, not after. This report shows how they got there and what others can do to follow.

Most are bolting AI onto broken infrastructure

- **Investment is outpacing infrastructure**
  Only 16% of organizations have replaced fragmented legacy systems with an integrated platform. The money is moving. The architecture isn't.
- **Agentic AI is everywhere. Autonomous work is not**
  Fifty-nine percent of organizations have moved beyond piloting agentic AI, but only 9% have made meaningful progress building autonomous, multistep workflows. Most are paying for a capability they haven't unlocked.
- **Confidence is masking an execution gap**
  Overall, AI maturity rebounded to 51 out of 100. But AI-enabled workflows score just 40—the lowest of all seven pillars. The ambition is real. The infrastructure to execute it isn't.

Underneath the confidence, chaos is growing

AI maturity rebounds. Execution at scale lags



Average pillar scores

After declining in 2025, when rapidly advancing technology outpaced organizations' ability to keep up, AI maturity has made a comeback, climbing 16 points to reach 51 out of 100 in 2026.

Organizations are entering an execution phase with clearer direction, stronger leadership, and measurable accountability.

Organizations are most advanced in AI vision, strategy, and leadership—and in establishing the management and culture that will sustain AI growth. Compared to last year, many have also made some progress on data modernization, governance, and generating value from AI, suggesting organizations are trying to close the gap between AI ambition and AI infrastructure.

Two pillars tell a different story, highlighting cracks that weaken execution and long-term success.

Talent and skills
Although organizations have made the most year-over-year progress here, few have tailored, ongoing AI training and long-term HR plans to foster human and AI collaboration.

AI-enabled workflows
Maturity for this pillar is lowest at 40, a reflection of just how much more challenging orchestration is than automation.

AI spend surges. So does the pressure to deliver

Something fundamental shifted this year. AI stopped being a line item that organizations debate and became one they defend. Investment grew 110% in a single year. By 2027, AI spend is projected to rise another 81%, representing more than 20% of an organization's IT budget.

The sharp rise is driven by new AI solutions, the need to update underlying IT infrastructure, and the pressure to deliver results: profits, growth, and competitiveness. This kind of acceleration doesn't happen unless leadership is convinced AI is existential, not experimental.

The pattern holds across every sector. Government organizations increased AI spend by 140% year over year, more than any other industry surveyed. This signals that even the most process-bound institutions are moving with urgency. In manufacturing, spend rose 126%, driven by pressure to modernize operations built on decades of legacy infrastructure. Different industries. Different drivers. The same fundamental commitment.

Revenue spent on IT by 2027

Up from 4.6% in 2025

8.2%

IT budget allocated to AI by 2027

Up from 13.1% in 2025

20.4%

YoY increase in AI as % of revenue

2025 → 2026

110%

Survey-reported projection

The foundation has cracks
Most executives still wrestle with the prerequisites for AI at scale: data modernization, solid governance, seamless integration across systems, and the IT infrastructure to support autonomous execution. A brilliant AI agent can become a dangerous liability if it isn't built on the right foundation.

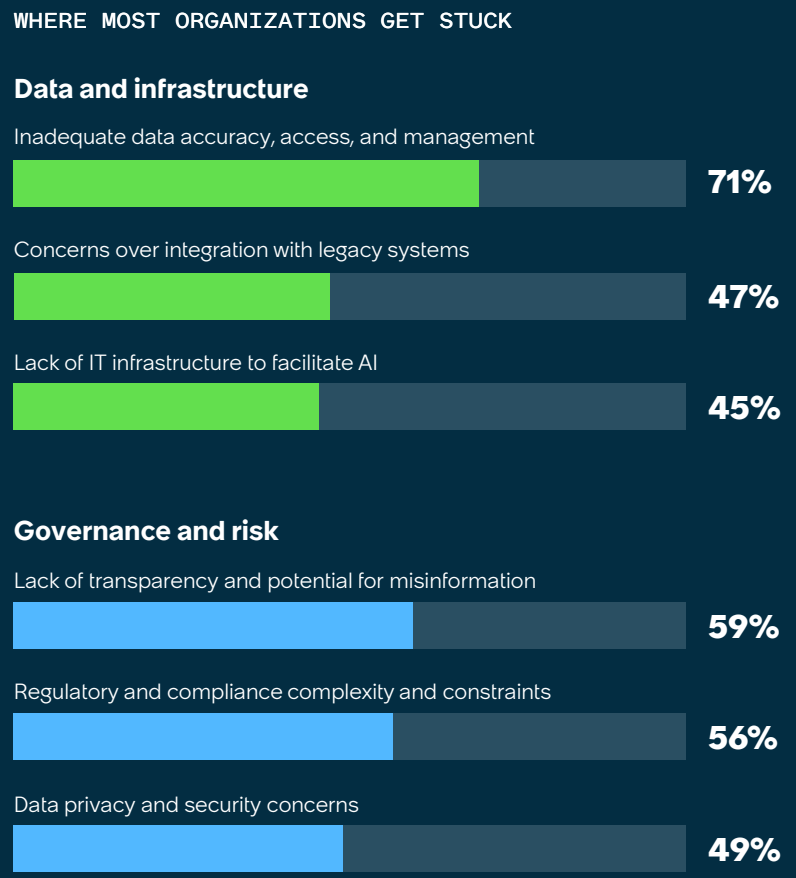
The most important part of that foundation is data modernization—which executives see as the No. 1 challenge to AI adoption. Poor accuracy, access, and management set organizations up for failure.

Other top AI challenges include lack of transparency and potential for misinformation—cited by six out of 10 executives—with regulatory and compliance complexity close behind. And only 20% have implemented AI testing, auditing, and risk assessment processes. As AI takes on more decision-making, the absence of clear governance frameworks amplifies the risk of deploying AI agents.

Legacy system integration and inadequate IT infrastructure are hurdles for many executives, showing that their organizations are trying to scale AI without the connected, unified foundation good execution requires. As a result, early wins remain fragile and difficult to replicate beyond isolated use cases.

The pattern is consistent: Organizations that bolt AI onto fragmented systems get fragmented outcomes. The investment grows. The results don't.

As AI scales, cracks become chasms



Global barriers. Local pressure points

While all organizations grapple with common barriers of data, governance, and infrastructure, local challenges around culture, leadership practices, and regulatory concerns shape the path to AI maturity differently around the globe.

AMERICAS

In **Canada**, potential job loss from AI is top of mind. This also makes it harder to select the right AI use cases that will drive value with minimal workplace disruption.

In the **United States**, leadership commitment to AI strategy is a clear gap. In fact, 57% of employees think that their leadership teams are not staying on top of fast-changing market trends.

Because of structural, regulatory, and investment constraints, organizations in **Mexico** have greater concerns about legacy systems than most other countries.

EUROPE AND MIDDLE EAST

Customers in **France** are resisting AI use more than those in other countries. Only 42% of execs there say that clients are happy with AI-enabled experiences, compared, for example, with 63% in the US.

In **Germany**, legal liability and intellectual property risk looms larger because of the country's strict regulatory environment and claimant-friendly courts.

In the **United Kingdom**, concern about job loss runs deep, creating tension between the urgency to move forward and the need to bring people along.

In **Saudi Arabia**, employee resistance to AI is higher due to more rigid, risk-averse workplaces, compounded by siloed data and overlapping tools.

ASIA-PACIFIC

In **Australia**, trust in AI-generated outputs and accountability is the defining tension for leaders. Without confidence in what AI produces, progress stalls before it starts.

In **India**, legacy infrastructure is a bigger barrier than in many other countries. That is because many critical services were digitized late on low-cost stacks, which are now tightly bound to national platforms.

In **Japan**, leadership challenges are a greater drag on AI progress. By the time consensus-driven decisions are reached, the pace of AI has moved on. Further, six out of 10 employees think their leadership teams are not up to the task.

Intention over speed

Across banking, healthcare, manufacturing, government—you name the industry or the market—I see the same pattern playing out. The organizations pulling ahead with AI are not the ones that moved first. They are the ones that asked a better question.

They didn't ask: how do we use AI to do this faster? Instead, these leaders asked a more foundational question: Should this work exist at all?

Automating a broken process doesn't create value. It simply makes the problem happen faster.

I've seen organizations invest heavily in AI to accelerate workflows that should have been redesigned or retired. The technology worked exactly as expected, but the outcome delivered very little. When you contemplate that much of this work is still happening in disconnected siloes with fragmented tech, the organizational impact was stunted before it began.

However, the many (but still not majority of) leaders getting this right take a step back before deploying a single agent. They ask whether the process reflects the organization they are building toward or the one they inherited. They treat AI as a design decision, not a technology deployment. And they have the leadership clarity and courage to ask: what are we trying to become?

That discipline is what separates organizations that are experimenting with AI from the ones that are truly transforming with it.

In the end, the advantage isn't speed or volume or technical sophistication.

It's intention.

Holly Briedis

SVP, Global Industries and Solutions
ServiceNow

Automating yesterday's work vs. reinventing tomorrow's

Agentic AI is everywhere. Autonomous work is not

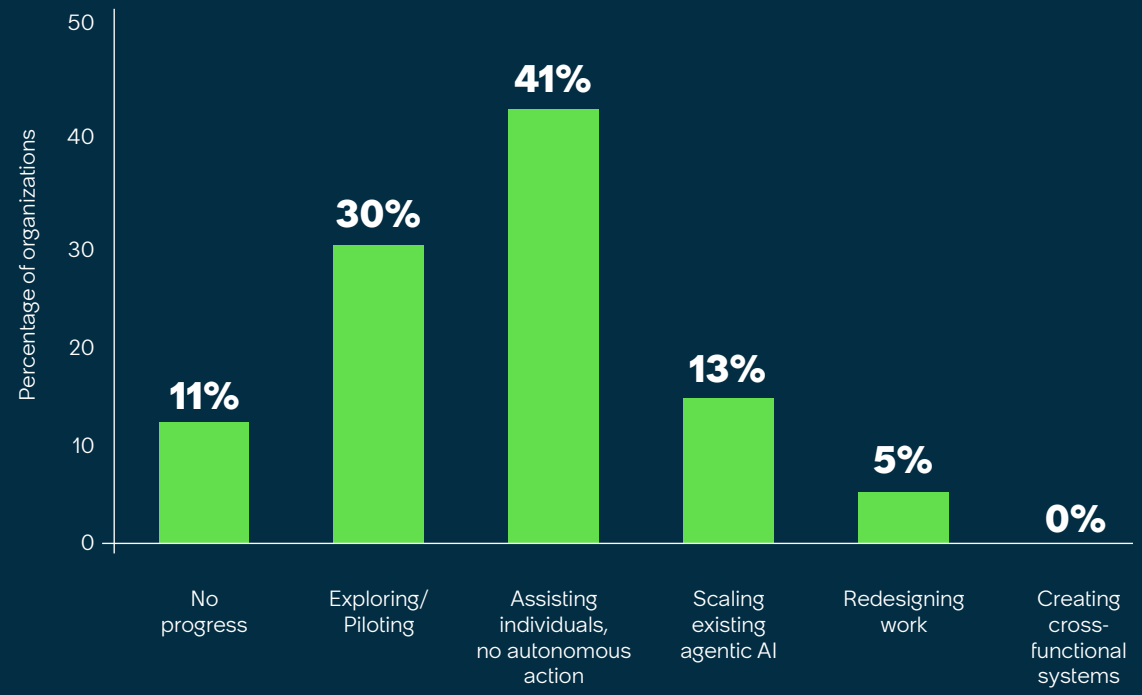
From unfamiliar to almost everywhere in 12 months
A year ago, 71% of executives said they were not very familiar with agentic AI, and only one-third of organizations were piloting or operating an agentic AI use case. This year, the percentage of organizations using agentic AI has jumped to 59%, and another 30% are piloting it.

That is one of the fastest adoption curves in the study's three-year history.

For many, autonomous work is still out of reach
Most organizations are using AI agents to assist individuals, which is useful, but a long way from autonomous. Only 5% are redesigning work, as opposed to using AI agents to autonomize existing workflows. Zero percent of organizations surveyed have built a cross-functional, self-improving agentic operating system. Most organizations still use agentic AI as a set of disconnected assistants, not as a coherent operating layer that maximizes end-to-end performance and scales pilots to production.

One reason organizations are moving slowly on autonomous execution is risk avoidance. When guardrails aren't in place, agents can take unintended actions across interconnected workflows faster than anyone can catch them, amplifying data bias, operational errors, and compliance breaches. Moving from assisted to autonomous isn't just a technology decision. It's a governance one.

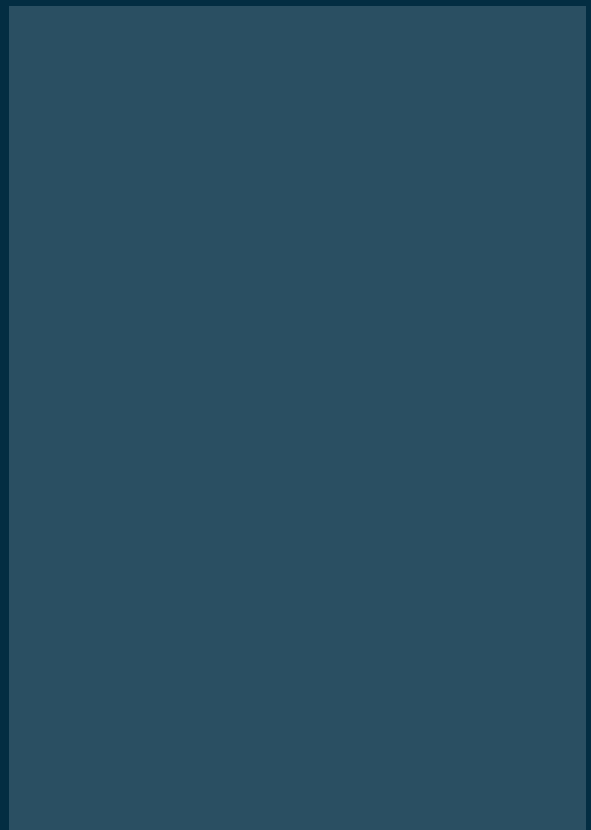
Few are progressing on agentic AI initiatives



Most are paying for a capability they haven't yet unlocked

59%

of organizations are using agentic AI



ONLY

9%

have made significant progress using agentic AI to create autonomous, multistep workflows

Where agentic AI is already delivering

Customer onboarding

"We used AI agents to guide the masses of customers about a loan application guide from start to the end.

CTO, UK

BANKING

Medical coding and documentation

"AI automatically summarizes patient visits and creates structured clinical notes, reducing physician documentation time.

Director, India

HEALTHCARE PROVIDER

Point of sale or e-commerce

"We leveraged commerce tools to build an AI-enabled agentic commerce channel.

SVP, Mexico

RETAIL

Public engagement

"[We are] deploying conversational AI agents that handle thousands of routine citizen inquiries 24/7 with empathy and speed.

SVP, Belgium

GOVERNMENT

Service assurance

"We deployed AI agents that automatically optimize routing, bandwidth, and security across our network.

Sr. AI engineer, US

TELECOMMUNICATIONS

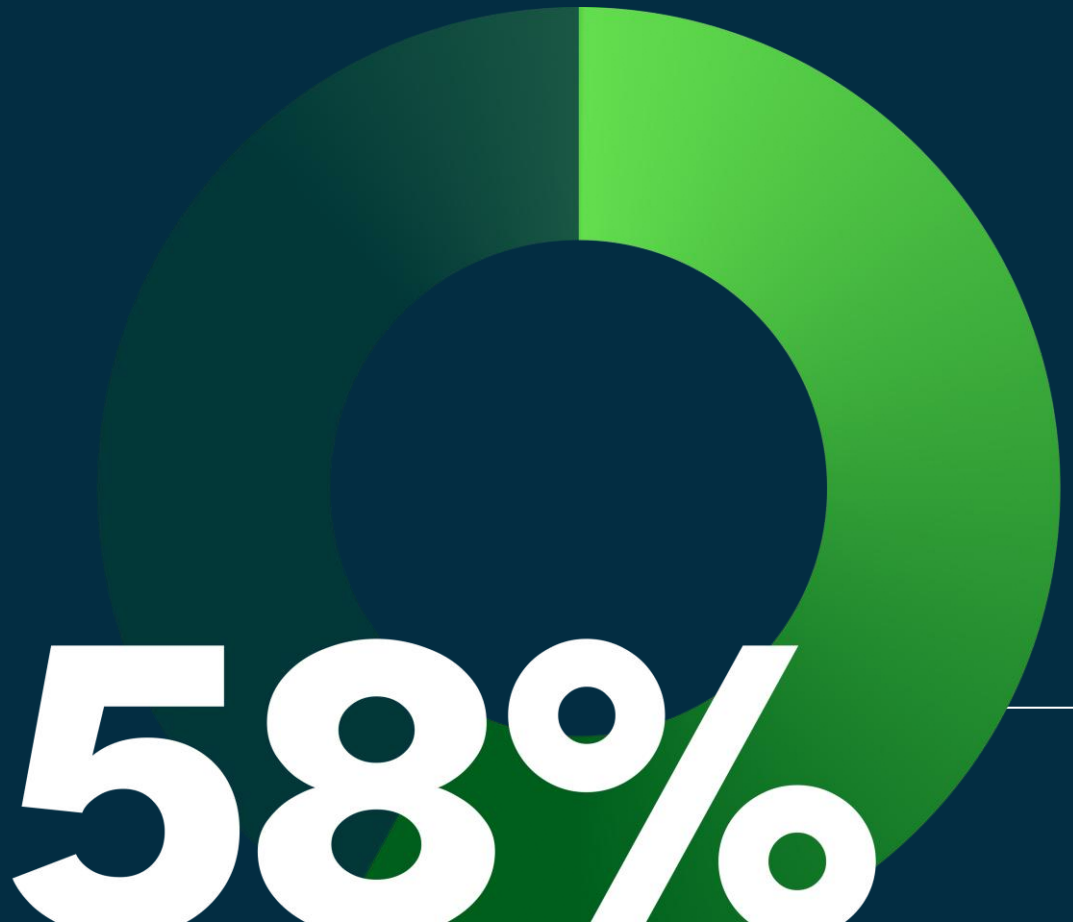
Maintenance

"Agentic AI automates routine infrastructure tasks, ensuring outcome-driven service delivery.

Director, France

TECHNOLOGY

AI can't reinvent work it can't connect



Fragmented systems, disjointed outcomes
Most organizations are scaling AI on top of infrastructure that was never built for it. Only 16% of survey respondents have widely or fully replaced fragmented legacy systems with an integrated platform. The rest are bolting AI onto disconnected architectures and expecting end-to-end results. In that situation, AI fails to get the complete, real-time view it needs to act reliably. Without integrated foundations, use cases stay isolated and hard to scale.

Data silos put blinders on AI
Not only are systems fragmented—so is data. Forty-one percent of employees rank data silos among their organization's biggest AI mistakes. Similarly, 41% of organizations cite siloed data as a major challenge in AI adoption.

When information is scattered across business units, it lacks the context required for accurate, trustworthy AI outputs. AI returns partial answers, struggles with complex queries, and cannot consistently support the decisions that matter.

of employees say their organization is not doing a good job connecting AI-enabled workflows across the enterprise

Employees are willing. Organizations are not prepared

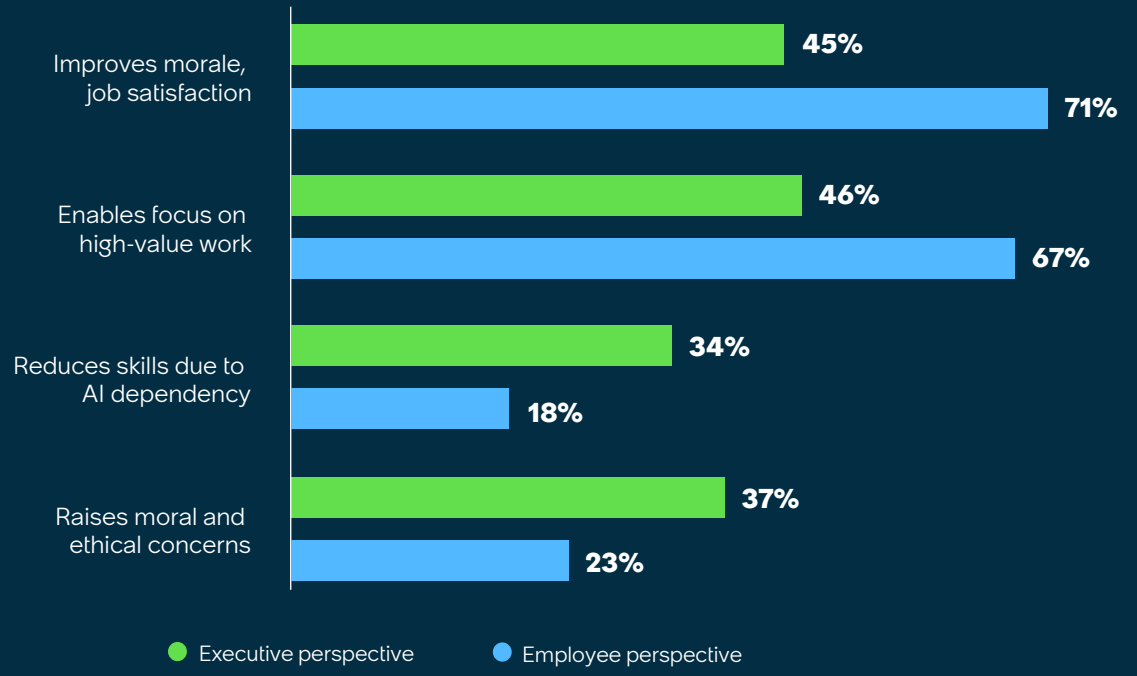
Employee-employer disconnect gets in the way of aligning investment to impact

Personal use of generative AI tools has accelerated employee enthusiasm faster than most leadership teams have recognized. Employees are significantly more likely than executives to believe AI will improve their job satisfaction, enable higher-value work, and strengthen collaboration. They are also far less worried about the downsides. Executives are overestimating the cultural resistance and underestimating the readiness.

Organizations that stay in touch with employee sentiment can move faster, with more confidence and greater workforce alignment behind their AI investments.

The workforce is enthusiastic. Leadership hasn't caught up

What impact will AI have on employees?



AI is moving faster than workforce readiness
Employees might be feeling good about the impact of AI on their tasks, but nearly half believe their jobs will become less necessary as AI agents evolve. Many believe their organization is not doing a good job training them. Long-term HR plans and redesigned operating models for AI-human collaboration are largely neglected.

The risk is losing the engagement and trust that AI transformation requires.

> **Leaders should be skilled in guiding this change, assisting employees in viewing AI as a tool for empowerment rather than a threat.**

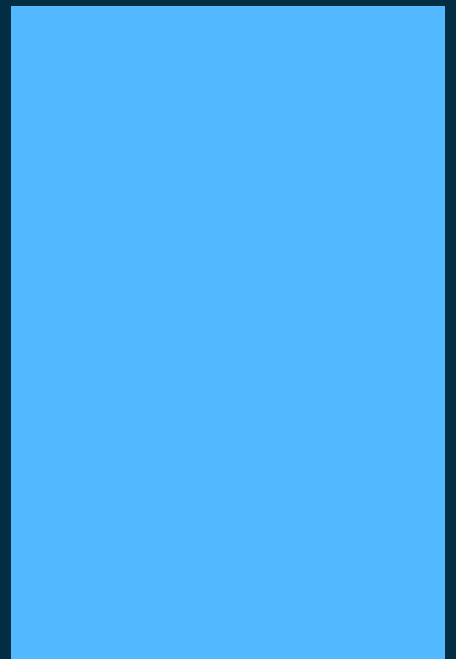
Employee, UK

59%

of organizations don't have long-term HR plans to support the future of work

42%

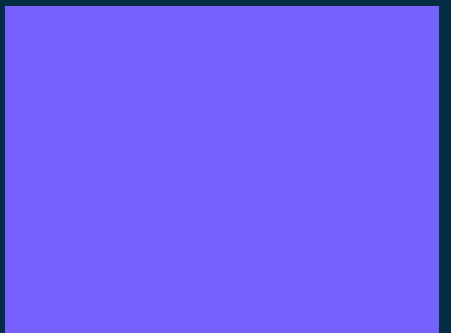
of employees say they aren't getting enough AI training



ONLY

21%

of organizations have assessed AI skills across the enterprise



Build for people, not systems

Most organizations have not failed at AI because they lacked ambition or the budget. They failed because they bolted AI onto broken, fragmented infrastructure and then expected employees to figure it out.

That's backwards.

The friction your employees face every day—navigating multiple portals, hunting for answers in data silos, and learning five different interfaces—isn't just a tech hurdle. It's a design failure. When people have to work for the system rather than the system working for them, they don't use the AI. They work around it. And the moment they work around it, ROI plummets.

The leaders winning right now share one obsession: They make AI intuitive and almost invisible. It shows up where employees already work. It speaks natural language, and it doesn't give more soul-crushing homework; it finishes the job.

"Invisible AI" sounds like a paradox, but it's the highest standard. When people stop thinking about the tool and start focusing on the outcomes, adoption takes care of itself.

You can choose to add more noise, or you can choose to build a foundation where AI and people thrive.

Every leader can make that choice right now. Go be one of them and equip your employees for success.

Bhavin Shah

Senior Vice President and
General Manager of Moveworks and AI
ServiceNow

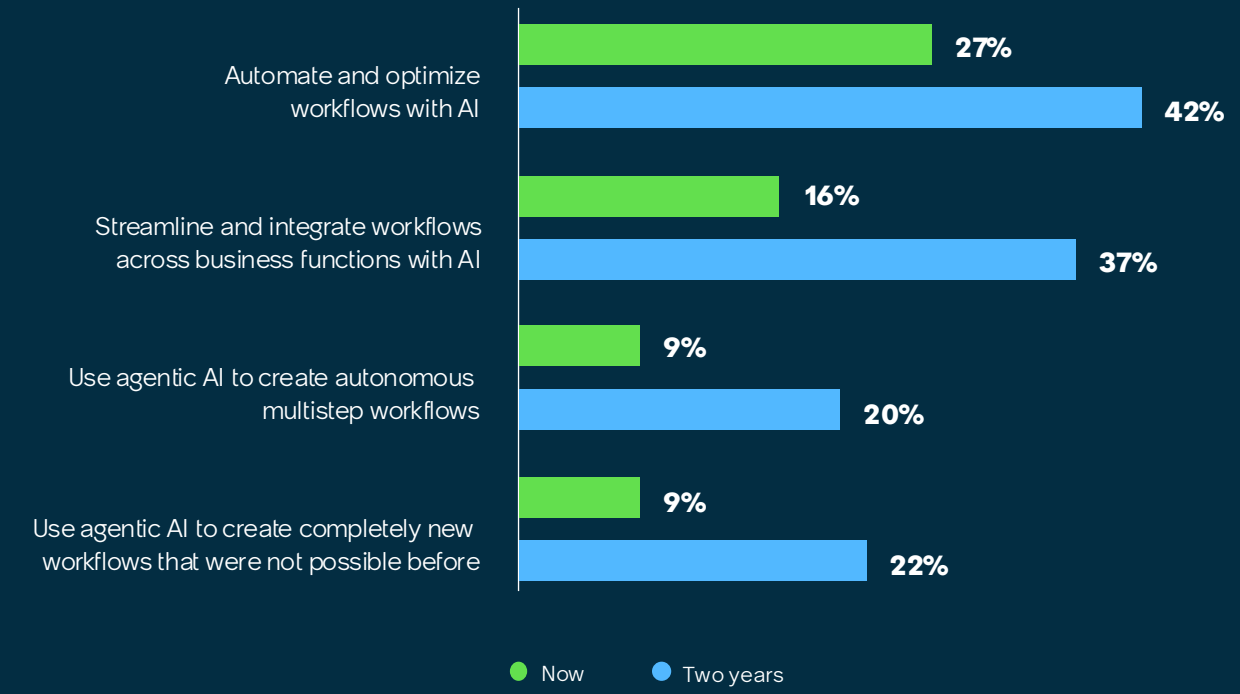
While ambitions remain modest, orgs plan to double progress

AI is being applied to existing workflows, not better ones
Most organizations are using AI to do the same work slightly faster. The more transformative uses of agentic AI—creating autonomous multistep workflows or entirely new workflows that were previously impossible—remain out of reach for the vast majority.

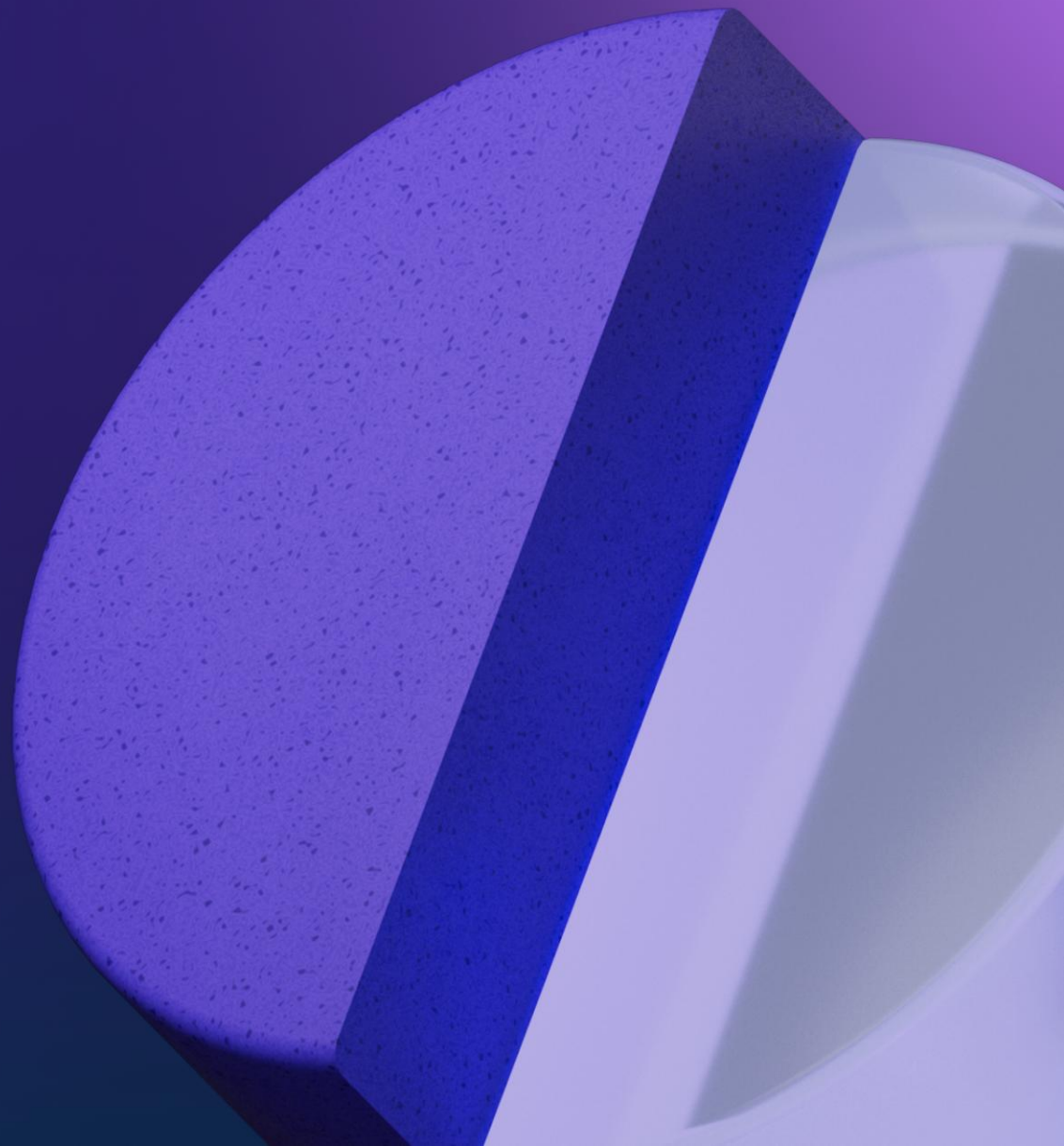
Working across business functions, a key component of enterprisewide AI, is even harder this year than it was last year. In 2025, 30% of organizations had streamlined and integrated workflows across business functions with AI. In 2026, that dropped 14 points to 16%. This is happening because organizations still have fragmented platforms with a new wave of agent sprawl sitting on top of them.

The two-year outlook doesn't close the gap
Even looking two years ahead, ambitions remain modest. Only 20% of organizations expect to be using agentic AI to create autonomous multistep workflows. As AI capabilities accelerate, organizations still running on outdated workflows will find themselves falling behind on productivity and unable to deliver the new products and services AI makes possible.

Efforts to modernize workflows



Reinvention starts here



Without control, chaos compounds

The pattern I keep seeing across industries isn't a technology gap; it's a deployment gap. Organizations are moving agents into production faster than they're building the capabilities to manage agents, both individually and collectively.

The core risk isn't an individual agent failing. It's that connected agents amplify each other's errors as readily as they amplify each other's value. Complexity compounds faster than most organizations anticipate, and by the time it becomes visible, the cost to correct is significant.

This isn't new territory. Organizations that invested early in cloud and API governance paid a one-time architectural cost. Those that didn't, pay repeatedly—at increasing scale, and always at worst possible moment. End-to-end orchestration is that same inflection point. Most enterprises are underestimating how early they need to make the call.

What end-to-end orchestration requires is a unified layer that routes, governs, and audits agent decisions across functions, not just within them. Siloed orchestration is still fragmented execution.

Human judgment in this model isn't a bottleneck. It's the architecture itself. Leaders define the boundaries within which agents operate and the outcomes they're accountable for. That distinction shapes everything about how the system gets designed.

Organizations that move first on orchestration infrastructure aren't just managing risk better. They're building the foundation that turns autonomous AI from an operational liability into a durable competitive advantage, one that compounds over time.

Vijay Kotu

Chief Analytics Officer
ServiceNow

Pacesetters aren't just AI enabled. They're AI first

Every year, a group pulls ahead in the study. We call them Pacesetters
Pacesetters represent approximately 21% of organizations surveyed, united by a maturity score above 60 and an average score of 74, well above the average for others of 45 and global average of 51. What defines them is not budget or industry. It is a fundamental decision about how AI fits into the enterprise. While most organizations deploy AI into existing structures, Pacesetters build their organizations around AI. The difference between those two approaches is compounding with every AI deployment that follows.

End-to-end orchestration drives business reinvention
Pacesetters treat orchestration as the foundation, not the goal. They connect data, workflows, and governance across the entire enterprise so that AI doesn't just assist people; it completes work end to end. That structural choice is what separates an organization with a lot of AI tools from one that is genuinely AI first. And for Pacesetters, that structure includes their people. The organizations pulling ahead are redesigning how humans and AI work together, not just how technology is deployed.

What Pacesetter status delivers

Pacesetters achieve higher ROI

194%

AVERAGE ROI IN TWO YEARS

160%

AVERAGE ROI TODAY

Exponential impact compared to others

6.5x

More likely to use AI to improve or create new products, services, and revenue channels

5.6x

Higher productivity

2.7x

Greater ability to scale

2.6x

Better at reducing risks

Five strategies separating Pacesetters from the rest

The gap between where most organizations are and where Pacesetters operate is wide, but it is closable. The research reveals key strategies that define how leading organizations are pulling ahead.

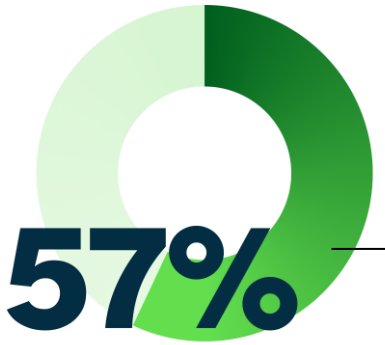
1. Set the vision. Bring everyone with you
2. Control your data. Unleash your AI
3. Move beyond automation. Start orchestrating
4. Build the workforce your AI strategy demands
5. Accelerate governance. Close the chaos gap

LESSON 1

Set the vision. Bring everyone with you

Pacesetters don't hand AI strategy down from the top. They spread it across the entire organization. Vision is communicated widely, backed by implementation plans and tied to defined outcomes. Strategy, for Pacesetters, is not a document. It is a shared direction.

But strategy alone is not enough. Culture is what makes it stick. Pacesetters build AI mindsets before they build deployments. They define AI responsibilities at every level, encourage experimentation, and create the conditions for people to reimagine how work gets done. They understand that AI transformation doesn't happen to an organization. It happens inside one.



of Pacesetters set a shared strategic vision for AI beyond efficiency gains, compared to just 21% of others

Pacesetters commit at every level

1. **Communicate AI vision widely across the organization**
   71% of Pacesetters vs. 29% of others
2. **Create an implementation plan with timelines and defined metrics for AI transformation**
   70% of Pacesetters vs. 17% of others
3. **Build an AI mindset that reimagines how work is done**
   72% of Pacesetters vs. 34% of others
4. **Define AI responsibilities across C-suite and staff**
   58% of Pacesetters vs. 12% of others

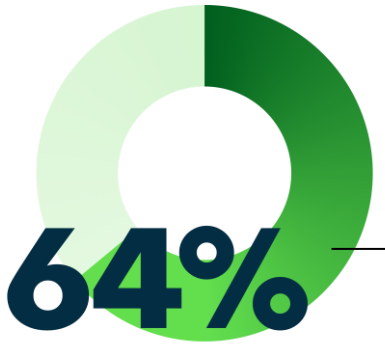
LESSON 2

Control your data. Unleash your AI

Data and AI are only as powerful as connectivity
The most sophisticated AI agents still can't reason, act, or reliably execute across an enterprise if the data supporting them is fragmented, siloed, or out of date. Clean, connected, real-time data isn't a technical nice-to-have. It is what makes AI useful at scale.

Pacesetters treat data modernization as a strategic prerequisite, not an IT project. They replace legacy systems with integrated platforms, establish clear policies for data ownership and control, and use AI to improve how data is migrated, created, and managed. The result is an enterprise where AI doesn't just have access to data. It has the right data, in context, at the moment it needs to act.

For Pacesetters, every interaction, every workflow, every data point adds enterprise context that makes their AI more precise and the organization's decisions more reliable over time.



of Pacesetters use digital technologies to integrate and optimize data, compared to 14% of others

Pacesetters have AI-ready data

1. **Set up policies for data ownership and control**
   71% of Pacesetters vs. 22% of others
2. **Implement tools to collect and track data in real time**
   67% of Pacesetters vs. 12% of others
3. **Use AI to improve data migration, creation, and management**
   66% of Pacesetters vs. 14% of others
4. **Create processes to clean, tag, and standardize data**
   64% of Pacesetters vs. 13% of others

LESSON 3

Move beyond automation. Start orchestrating

Most organizations automate the way they built their technology stacks: one problem at a time, one tool at a time, one department at a time. Individual tasks get faster. The enterprise stays fragmented.

Pacesetters reject that model. They embed AI across departments, connect it across functions, and keep going until routine work runs itself—not as a set of disconnected tools, but as a governed layer that coordinates AI agents, data, and decisions across the entire enterprise. That is not automation. That is orchestration.

The result is an enterprise where AI and people operate together at scale. Routine coordination, routing, and execution are handled by AI. Human judgment, creativity, and decision-making move to the center.

> **"Embedding AI into core workflows resulted in performance gains, rather than introducing standalone tools.**
>
> CIO, Pacesetter insurance company, France

Pacesetters close the workflow gap

1. **Implement AI initiatives across a wide range of departmental workflows**
   61% of Pacesetters vs. 5% of others
2. **Streamline and integrate workflows across business functions with AI**
   58% of Pacesetters vs. 5% of others
3. **Use agentic AI to create autonomous multistep workflows**
   36% of Pacesetters vs. 2% of others
4. **Use agentic AI to create completely new workflows not possible before**
   36% of Pacesetters vs. 1% of others

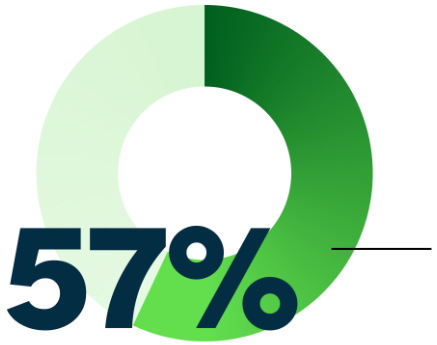
LESSON 4

Build the workforce your AI strategy demands

Business reinvention doesn't happen without people. Pacesetters know this, which is why they build deliberate strategies to attract, develop, and retain AI talent—not as a one-time initiative, but as an ongoing organizational discipline. They think long term, building HR plans that target the roles and skills needed to become AI-first organizations.

What separates them most is how seriously they take the human side of AI. They establish dedicated teams to experiment with new ideas, launch change management programs to eliminate outdated ways of working, and build new structures for managing AI agents and humans together. Tailored training, external partnerships, and systematic skills assessments ensure their people are ready for what's next.

Pacesetters build organizations where people and AI are ready to work together at scale—and the results show it: Pacesetters are 2.6 times better at employee engagement and retention than others.



of Pacesetters launch change management programs, compared to 7% of others

Pacesetters invest in their people

1. **Develop strategies to attract, hire, and retain AI talent**
   68% of Pacesetters vs. 10% of others
2. **Build long-term HR plans to support AI strategy**
   58% of Pacesetters vs. 5% of others
3. **Provide tailored, ongoing AI training and upskilling programs**
   57% of Pacesetters vs. 4% of others
4. **Assess AI skills across the organization**
   54% of Pacesetters vs. 12% of others

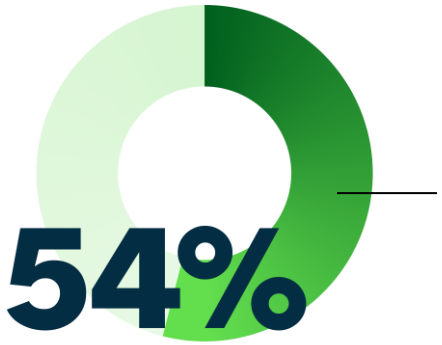
LESSON 5

Accelerate governance. Close the chaos gap

Pacesetters treat AI governance as a competitive advantage, not a compliance burden. Instead of a one-time policy document, they build living processes: continuous regulatory scanning, ongoing risk assessment, and systems to track compliance and accountability across their enterprise.

As agents assume greater decision-making, Pacesetters establish cross-functional oversight that defines standards and intervenes when risks emerge. Every autonomous decision is grounded in enterprise rules, auditable from end to end, and aligned with organizational policy.

The result is an organization that moves faster because the foundations are right. Governance is what lets Pacesetters accelerate without losing control. Autonomous doesn't mean unattended. The organizations that move fastest on AI are the ones that have defined, in advance, exactly where human judgment begins.



of Pacesetters say organizations need a security-first approach when developing AI solutions

Organizations that embed security from the start build the audit trails that let them move fast without losing control.

Pacesetters prioritize governance

1. **Embed trust and transparency into AI processes**
   69% of Pacesetters vs. 16% of others
2. **Communicate regularly with regulators to stay informed on evolving AI standards**
   64% of Pacesetters vs. 13% of others
3. **Install a system to manage and track governance and compliance initiatives**
   61% of Pacesetters vs. 17% of others
4. **Implement AI testing, auditing, and risk assessment processes**
   61% of Pacesetters vs. 10% of others

Your AI roadmap

The leadership path to business reinvention

For decades, organizations have been built around one assumption: that getting the right person to act on the right problem was the hardest thing to do. The org chart, the approval process, the meeting, the escalation path—all were built to allocate scarce human judgment to the decisions that needed it the most.

AI dissolves that constraint by democratizing levels of intelligence. And most organizations have not yet reckoned with what that means for how they are built.

Executives are already living with the early consequences. They are individually collaborating with AI models. Some have deployed agents. Many have automated workflows. Some have begun redesigning how work flows. But even AI Pacesetters have largely treated AI as something deployed into an existing organizational structure and management system.

The next phase demands something more challenging. It requires redesigning the structure, reimagining work, and rethinking the value model.

When agents become an integral part of the workforce—not as a tool, but as a participant—the questions change. Where can an agent add the greatest value when you break roles into tasks and separate creative and critical knowledge work from knowledge work? How do you onboard an agent? How do you measure its performance? Who is accountable when it acts outside the boundaries you set?

How do you build a team of humans and agents that improve together over time? How do humans and agents unlock net new value?

These are not technology questions. They are organizational design questions that no enterprise has fully answered. The leaders who move earliest to answer them will shape what the next-generation, AI-first organization looks like. And this creates an exponential advantage. In a world where everyone else is automating and scaling yesterday's models, an AI-powered status quo is permeating.

Here is the call to action I want to leave you with: Every leader reading this report has an org chart. Very few have a work chart, a living map of how outcomes flow and could flow through the enterprise, showing where humans add irreplaceable imagination and judgment and where agents can own execution, securely, end to end. You need that map. You need that vision. The future of work isn't about yesterday's work. It's about imagining a new model for improving outcomes and inventing new ways to deliver value.

Until you create one, you are managing AI as a capability. The leaders who pull furthest ahead will manage it as an augmented workforce.

That is the work still ahead. And it is the most important organizational design challenge of the next decade.

Brian Solis

Head of Global Innovation
ServiceNow

Experimenter
Testing AI approaches and running pilots in individual departments. Building the strategy and plans needed to scale.

21%
Surveyed

Scaler
Moving from plans to implementation. Building IT foundations and cross-functional collaboration to deploy AI across the organization. Most are still working through siloed systems and fragmented workflows.

57%
Surveyed

PACESETTER

Advancer
Strong foundations in place. Scaling AI enterprisewide and beginning to optimize with agentic AI, with full business reinvention still ahead.

17%
Surveyed

PACESETTER

Transformer
Reinventing business models, products, and services through widescale AI execution. AI is central to strategy, operations, and value creation.

4%
Surveyed

Build your roadmap. Accelerate AI maturity

AI maturity is a journey that is not strictly linear. Organizations move forward as their foundations strengthen and sometimes step back as technology, regulation, and business priorities shift. What matters is knowing where you are, because your next move depends on it.

Experimenter

With Experimenters, the key words are "thinking about it." These organizations are still developing their plans for AI. Most are just starting to automate and optimize workflows with AI—but not yet with agentic. Very few have replaced fragmented legacy systems, let alone developed business cases for AI initiatives.

Key challenges

- Choosing the right vendors for their individual needs
- Integration with their legacy systems
- Handling AI risks and ethical concerns

$7.3B
Average size

125%
Average AI ROI

Typical industries

- Nonprofit
- Government
- Healthcare provider

Roadmap from Experimenter → Scaler

Leadership

Define selection criteria for AI pilots before choosing them. Prioritize projects with measurable outcomes and assign executive ownership to each.

Governance

Establish initial policies for data privacy, ethical AI use, and risk management before pilots expand. Governance built at the start is an accelerator. Governance installed later is a brake.

Talent and skills

Identify internal AI champions and pair them with external expertise through universities, industry associations, and technology partners. Start building the talent pipeline before the skills gap becomes a chasm.

Generating value

Define success metrics before each pilot launches, not after. Use early proof points to build the internal business case for broader AI investment.

Culture

Build a change management program and an AI partner ecosystem. Treat every pilot as a learning asset: document what works, what doesn't, and why.

Data modernization

Develop data governance policies covering ownership, quality, and access. Clean, tagged data is the prerequisite for everything that follows.

Workflows

Identify the fragmented, manual processes consuming the most time and resources. Develop a phased plan to automate key workflows and start building the business case to retire legacy systems. Task-level automation is the entry point, not the endpoint.

Scaler

Scalers put their AI vision into action, adapting and updating their organizations to embrace AI with a value-driven approach. They have taken steps to address data, governance, and skills gaps. Yet most still have siloed legacy systems and traditional workflows. The most important moves at this stage are foundational: data modernization and governance. Organizations that resolve these two tracks to set themselves up for greater success.

Key challenges

- Unclear AI ROI
- Siloed data and traditional workflows
- Insufficient human oversight on AI

$9.1B
Average size

Standout region
EMEA

145%
Average AI ROI

Roadmap from Scaler → Advancer

Leadership

Formalize an AI strategy with defined objectives, priorities, and accountability structures.

Governance

Build a governance team with defined roles, policies, and oversight procedures. Introduce formal audit practices and embed transparency into autonomous workflows.

Talent and skills

Launch tailored, ongoing AI training and begin building long-term workforce plans that support AI-human collaboration. Define the roles your organization will need as AI matures and start recruiting for them now.

Generating value

Build a portfolio of AI use cases with measurable KPIs. Replicate what is working across functions, and drive greater value by delivering consistent results at scale.

Culture

Establish a cross-functional AI center of excellence to guide and align AI efforts across the organization. Use your change management program to shift the culture from adopting AI to building with it.

Data modernization

Move beyond data collection to data orchestration. Standardize processes for cleaning, tagging, and integrating diverse data formats in real time. Reliable data infrastructure is what separates scalable programs from isolated pilots.

Workflows

Prioritize retiring legacy systems that prevent integration across functions. Build automated workflows with repeatable processes that can be replicated at scale. Fragmentation that felt manageable in earlier stages becomes a strategic liability if not addressed.

PACESETTER

Advancer

Advancers have succeeded in developing a strong foundation for AI transformation. Modernized data systems are largely in place along with needed governance and clear AI vision. While in the process of optimizing workflows with agentic AI, these organizations still have some ways to go for complete business reinvention.

Key challenges

- Potential for job loss
- Employee resistance
- AI skills

$13.1B
Average size

159%
Average AI ROI

Typical industries

- Technology
- Telecommunications
- Life sciences
- Manufacturing
- Banking

Roadmap from Advancer → Transformer

Leadership

Develop an AI value framework that connects every major AI initiative to a specific business growth objective. Leaders must move the conversation from efficiency gains to competitive differentiation. Cost reduction is a byproduct, not the goal.

Governance

Evolve governance from project oversight to enterprise-wide accountability for AI outcomes. Establish KPIs that measure strategic business impact, not just operational efficiency. Governance should enable ambition, not constrain it.

Talent and skills

Create targeted strategies to attract, develop, and retain AI talent. The skills gap at this stage is specific: Advancers need people who can design orchestrated workflows, interpret AI-driven decisions, and manage AI-human collaboration at scale.

Generating value

Prioritize AI use cases that reshape business models and open new markets, not just those that reduce cost or improve speed.

Culture

Build cross-functional teams that actively reimagine how work gets done, not just how it gets optimized. Innovation at this stage means redesigning processes from first principles, not improving the ones inherited from the pre-AI era.

Data modernization

Assess data requirements for complex, multi-step workflows and update ownership and privacy policies accordingly. At this stage, data architecture decisions directly determine which autonomous capabilities your organization can deploy.

Workflows

Use agentic AI to orchestrate workflows across functions, not just within them. The shift from departmental automation to enterprise-wide orchestration is the defining transition of this stage.

PACESETTER

Transformer

Transformers are rare. They represent a small share of organizations globally, but they are setting the terms for what AI-first means in practice. They have moved decisively past efficiency and automation into new territory: fostering growth through new markets, customer segments, and business models, while driving a step change in competitive position and shareholder value. Transformers use AI not just to assist people, but to orchestrate work across the enterprise. The results reflect that ambition.

Key achievements

- 88% increased customer engagement and retention
- 87% accelerated time to value
- 84% reduced risks
- 70% improved staff engagement and retention

$10.3B
Average size

210%
Average AI ROI

Typical industries

- Life sciences
- Insurance
- Banking
- Retail

Transformer sustaining priorities

Leadership

Use AI to surface emerging opportunities before the market signals them. The question is no longer how to apply AI to the business. It is how AI reshapes what the business can become.

Governance

Your responsible AI frameworks and ethical AI policies should now be sophisticated enough that others benchmark against them. Governance at this stage is not a constraint on innovation. It is what makes bold innovation sustainable.

Talent and skills

Build continuous learning systems that evolve alongside AI capabilities. Prioritize developing the human judgment and oversight capabilities that make autonomous AI trustworthy and effective at scale.

Generating value

The value question is no longer how much ROI AI is generating. It is what new markets and competitive positions AI is making possible that didn't exist before.

Culture

Embed regular cycles of AI capability review into how the organization operates. Organizations that hold this position don't wait for new capabilities to find them. They are piloting what comes next before competitive pressure makes it urgent.

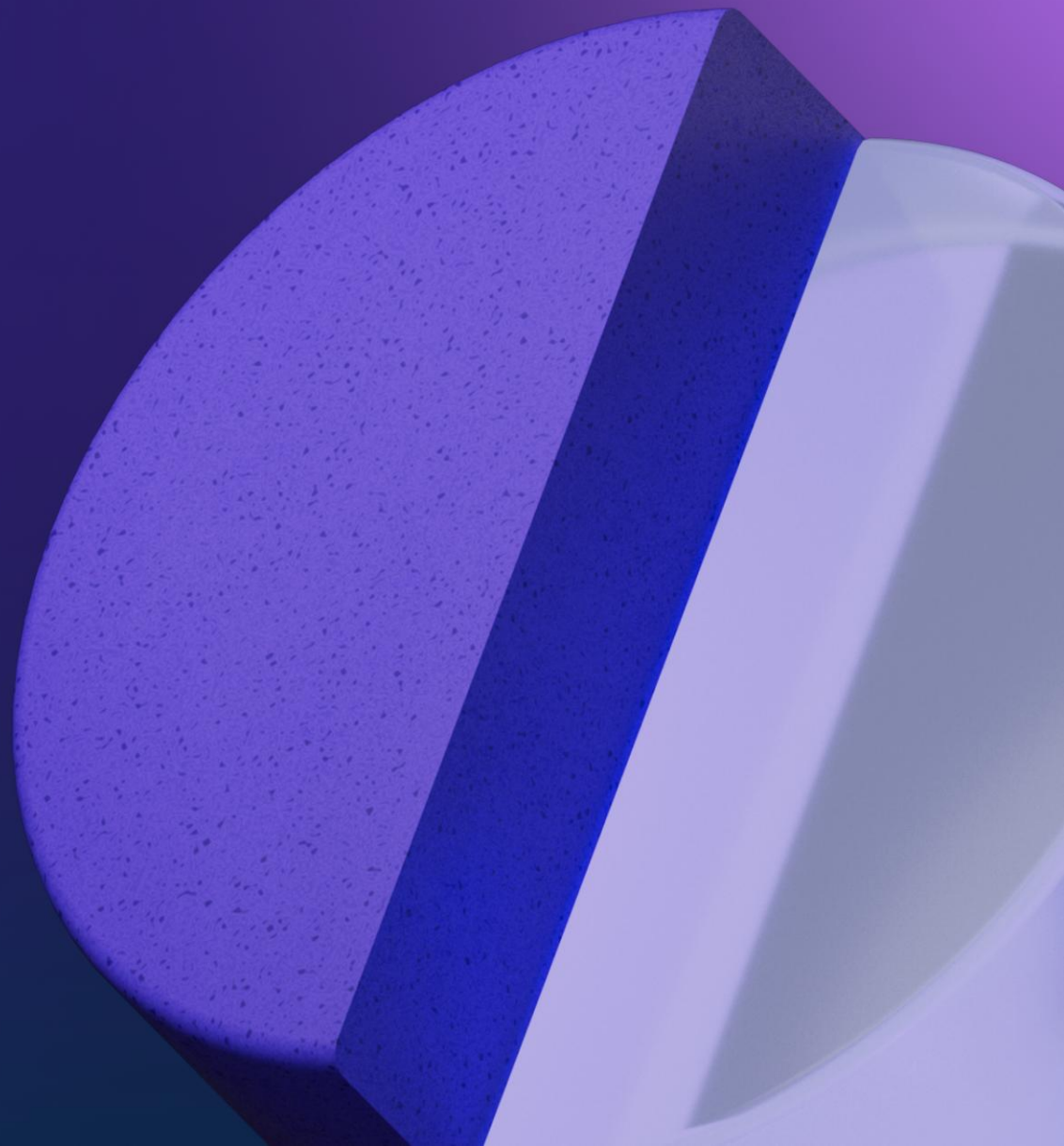
Data modernization

Move from managing data to using it predictively: surfacing signals and positioning the organization to act on opportunities before they become visible to others.

Workflows

Evaluate autonomous workflows not just for efficiency but for strategic reach. The benchmark is no longer whether a workflow is automated but whether it is self-improving and generating intelligence that feeds better decisions.

Appendix



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Survey demographics

Regions and countries

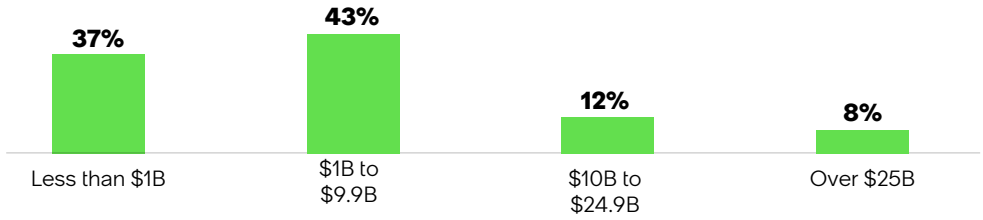
Americas	**1,400**	**825**
Brazil	200	75
Canada	200	150
Mexico	150	75
U.S.	850	525
APAC	**1,400**	**530**
Australia	350	85
India	350	250
Japan	300	100
Singapore	200	60
South Korea	200	35
EMEA	**1,700**	**625**
Belgium	100	35
France	250	85
Germany	250	85
Italy	150	70
Netherlands	150	35
Saudi Arabia	150	15
Spain	150	85
Switzerland	150	35
UAE	100	15
UK	250	185

Industry

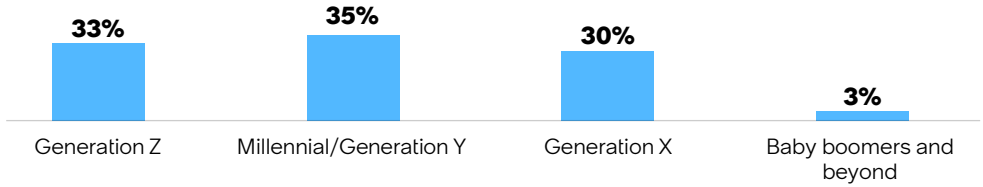
Automotive	325	74
Banking	450	318
Consumer goods	325	100
Government	425	118
Healthcare provider	400	152
Heavy manufacturing	200	86
Insurance	400	107
Life sciences	400	166
Nonprofit	350	202
Retail	400	199
Technology	425	317
Telecommunications	400	161

Respondents ● Executives (4,500) ● Employees (2,000)

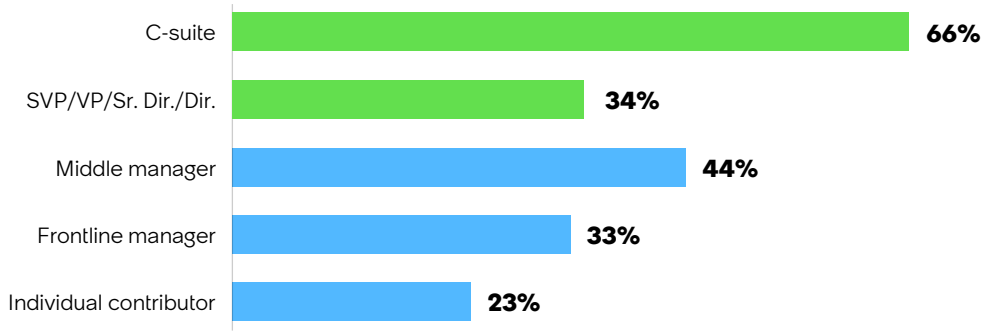
Revenue



Age



Role



AI index methodology

Updated AI Maturity framework

For 2026, we expanded the framework from five to seven pillars and refocused existing pillars to reflect new strategies and solutions.

1. **AI vision, strategy, and leadership:** Expanded to include setting a shared vision for AI transformation beyond efficiency gains and selecting AI projects based on ability to drive strategic outcomes.
2. **Management and culture:** New pillar measuring progress in establishing AI leadership teams, partner ecosystems, innovation centers, and enterprise-wide culture.
3. **AI governance:** Refocused to cover responsible AI use, oversight teams, regulatory compliance, and embedding trust and transparency into AI processes.
4. **Data modernization:** New pillar gauging progress on data quality, security, privacy, and compliance; data integration and standardization; and real-time data capture.
5. **AI-enabled workflows:** Refreshed to include agentic AI creating autonomous, multistep workflows and entirely new workflows not possible before.
6. **Talent and skills:** Updated to address AI's impact on the future of work, including long-term HR planning and managing AI agents and humans together.
7. **Driving value from AI:** Refocused from investment to value creation: new products, services, and business models, with sharper focus on performance metrics.

Calculating pillar scores

Each of the pillars was supported by a question asking respondents to gauge progress across sub-pillars, scored as follows:

0 = No progress

1 = Evaluating and building support

2 = Testing and developing plans

3 = Finalizing plans and starting implementation

4 = Scaling widely across the organization

5 = Fully implemented with significant results

Each pillar score was calculated by averaging its sub-pillar scores (range: 0 to 5).

Determining overall index score

All pillars were weighted equally. The overall score was calculated by averaging the pillar scores, dividing by 5, and multiplying by 100 to produce a 0 to 100 scale. Respondents were assigned to one of five categories based on overall score:

Evaluator: 1 to 19

Experimenter: 20 to 39

Scaler: 40 to 59

Advancer: 60 to 79

Transformer: 80 to 100

PACESETTERS

Less than 1% were Evaluators, so it was not included in the AI roadmap section.

Identifying Transformers

Respondents scoring 80 or higher were classified as Transformers only if they agreed with two or more statements about how their organization has driven strategic transformation through AI. Those scoring 80 or higher but agreeing with fewer than two statements were classified as Advancers.

ServiceNow (NYSE: NOW) is the AI control tower for business reinvention. The ServiceNow AI Platform integrates with any cloud, any model, and any data source to orchestrate how work flows across the enterprise. By unifying legacy systems, departmental tools, cloud applications, and AI agents, ServiceNow provides a single pane of glass that connects intelligence to execution across every corner of business. With more than 75 billion workflows running on the platform each year, ServiceNow helps organizations turn fragmented operations into coordinated, autonomous workflows that deliver measurable results.

Learn how ServiceNow puts AI to work for people at servicenow.com.