From Exploration to Transformation

What AI Success Looks Like

AI PULSE SURVEY — VOL. 1

protiviti®
Global Business Consulting

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Executive summary

Success with AI is a multidimensional journey that evolves with maturity, investment goals, technology shifts, and mastery of integration and data challenges. In researching AI adoption patterns, investment expectations and optimization challenges, Protiviti's inaugural AI Pulse Survey presents a snapshot of this evolving process at a pivotal moment in the AI revolution.

Among many findings, our global survey reveals that most organizations are actively testing AI or in the early stages of adoption. This trend is consistent across surveyed regions, sectors and job functions.

Fewer than 8% of the organizations surveyed place themselves at the highest maturity level, a stage in the AI journey where the technology fuels innovation and competitive advantage.

Return on AI investment follows a nonlinear trajectory, gaining momentum as adoption and integration improve and initial hurdles are addressed. Overall, 85% of respondents report that return on investment (ROI) on AI meets or exceeds expectations. Nearly half of our survey participants are seeing value from AI and more than a quarter are experiencing better-than-expected outcomes.

As AI maturity levels increase, so does ROI satisfaction. At the most-mature stage of AI adoption, 95% of respondents express high satisfaction with their AI investments, underscoring a strong correlation between maturity levels and achieving or surpassing projected ROI.

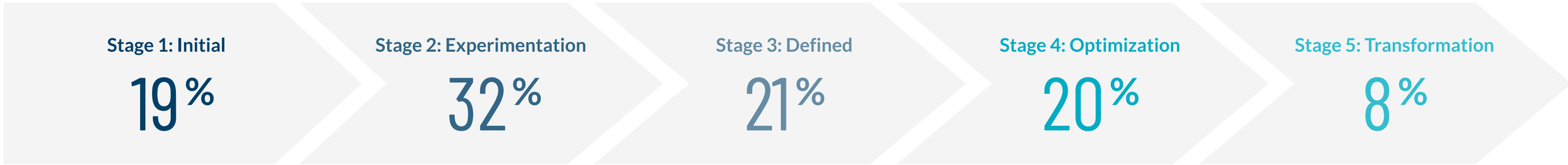
Perception of AI success also evolves with maturity. Companies in the early stages focus more on cost savings as a primary goal or ROI indicator, while organizations with more AI maturity recognize the importance of investing in capabilities that drive long-term growth and resilience. Among roles, the C-suite is notably more optimistic about AI driving the most benefits likely due to their broad purview and ability to recognize benefits across operations.

Looking ahead, organizations will need patience and persistence as challenges with system integration, use cases and data access are prominent throughout the AI journey, especially in the early and late stages.

The survey findings raise important questions: Is focusing solely on cost-cutting setting up early-stage organizations for underwhelming results? How can organizations transition from short-term gains to sustainable AI-driven growth? How do you measure ROI if your goal is to build long-term innovation?

Our experts offer critical insights into these questions, including actions companies can take now. Business leaders should focus on developing a realistic view of AI's potential and align AI with organizational strategy, culture and business goals. And, as the results show, there's a huge opportunity to maximize the value of organizational data and enhance data infrastructure to support AI use cases.

Figure 1: Stages of maturity: Where companies are in their AI journey



Notable findings

01

Most organizations surveyed are in the early to middle stages of AI adoption, with nearly 51% reporting that they are just beginning to explore AI or experimenting with AI through pilot projects.

- The technology sector is significantly ahead in AI maturity; over 70% are in stages 3 or 4.
- Among the sectors represented, a notably large number (37%) of manufacturing organizations are in the experimentation stage, a sign that companies are actively testing use cases like predictive maintenance, quality control and robotics.

02

Overall, 85% of organizations indicate that their investment in AI has met or exceeded their expectations. Only 15% of organizations, however, state that returns have been below expectations.

03

As organizations advance through the stages of maturity, satisfaction with AI investment returns improves significantly.

- At Stage 1, about one-third of organizations report returns below expectations.
- At stages 2 and 3, we begin to see a shift toward meeting expectations and slightly exceeding them.
- At the most-matured stage, the number of organizations reporting that returns have exceeded expectations surges to nearly 75%.

04

Integrating AI technology into existing systems is the biggest single challenge (30%). Lack of understanding and data availability are also significant, especially in the early and late stages, respectively.

05

Across functions, IT consistently leads in AI use cases, with particularly high adoption in the technology sector (82%). Customer service, marketing and sales show strong adoption in sectors like financial services, technology and manufacturing.

06

Regarding the perceived benefits of AI, employee productivity, cost savings and process efficiency remain top indicators across all stages of maturity.

- For early-stage companies (1–2), the focus is on cost savings, employee productivity and process efficiency.
- In the later stages (4–5), there's a noticeable rise in focus on customer satisfaction and revenue growth.

AI adoption and investment satisfaction

The results indicate strong interest in AI, although many organizations are still figuring out how to implement it effectively. A growing number of organizations are seeing tangible benefits from AI and are investing in scaling and optimizing their solutions. (See Figure 1.)

AI adoption by stage of maturity

- **Stage 1: Initial Exploration (19%)**
  - Organizations recognize AI's potential but have limited understanding and no strategic initiatives.
- **Stage 2: Experimentation (32%)**
  - Organizations are testing AI through pilot projects to assess feasibility and benefits.
- **Stage 3: Defined (21%)**
  - AI is integrated into business processes to enhance efficiency and decision-making.
- **Stage 4: Optimization (20%)**
  - Continuous improvements are made based on data feedback.
- **Stage 5: Transformation (8%)**
  - AI drives new business models and industry disruption.

From an industry perspective, the technology sector is significantly ahead in AI maturity, with about 30% of organizations identifying as stage 3 (defined) and showing strong integration of AI into business processes, and 40% in stage 4 (optimization), compared to only 21% across other sectors.

Organizational functions using AI

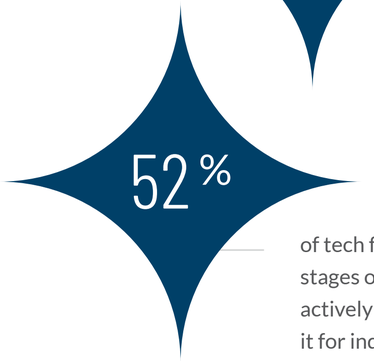
- IT leads with the highest AI adoption (53%), reflecting its central role in AI deployment.
- Customer service and operations follow closely at 48%, highlighting AI's value in automation and efficiency.
- Marketing and sales also show strong adoption (43%), likely due to AI's impact on personalization and analytics.
- Legal and manufacturing are on the lower end, possibly due to regulatory and integration challenges.

ROI satisfaction overall and by industry sector

Satisfaction levels with AI investment returns vary across industries and functions:

- Overall, 85% of organizations report that they are either seeing the value they anticipated from AI or experiencing better-than-expected outcomes.
- The technology sector leads in the slightly exceeded expectations (38%) category and has a strong showing in significantly exceeded (20%). In comparison, retail reported the highest-met expectations (61%) but the lowest significantly exceeded (4%).
- While half of manufacturers report that AI investments met expectations, 21% stated that their returns were below expectations.
- Nearly one in four of financial services respondents stated that their AI investments significantly exceeded expectations. The sector, compared to the other industry respondents, had the lowest dissatisfaction rate (8%).

of respondents at the highest maturity level (stage 5) report that ROI on AI has significantly exceeded their expectations.



of tech firms are in the two highest stages of maturity, where they're actively scaling AI systems and using it for industry-shaping innovation.

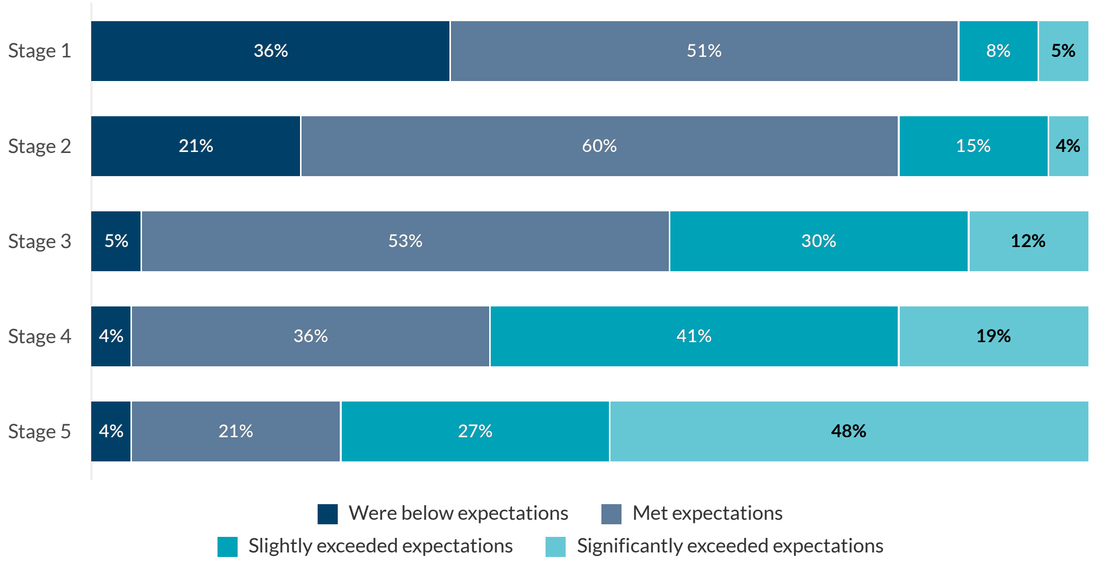
ROI satisfaction by maturity stage

As organizations progress through the various stages of AI maturity, a higher percentage report their investment returns meeting or exceeding expectations, compared with respondents at earlier stages. Specifically, of the respondents at stage 1 (very early adopters), 36% said their AI investment ROI was below expectations; at stage 2 (where organizations are experimenting with AI on a small scale), the number of respondents reporting ROI below expectations decreased to 21%. The "below-expectations" number continues to decline to 5%, 4% and 4% for those in stages 3, 4 and 5 respectively.

Here are some examples of how ROI satisfaction grows with AI maturity.

- At stage 1, a total of 63% of the respondents report that returns met, slightly or significantly exceeded expectations.
- At stage 2, which represents most of the survey respondents, 77% report that returns met, slightly exceeded or significantly exceeded expectations.
- At stage 5, the respondents who are truly satisfied with their AI investments overall surge to 96%.

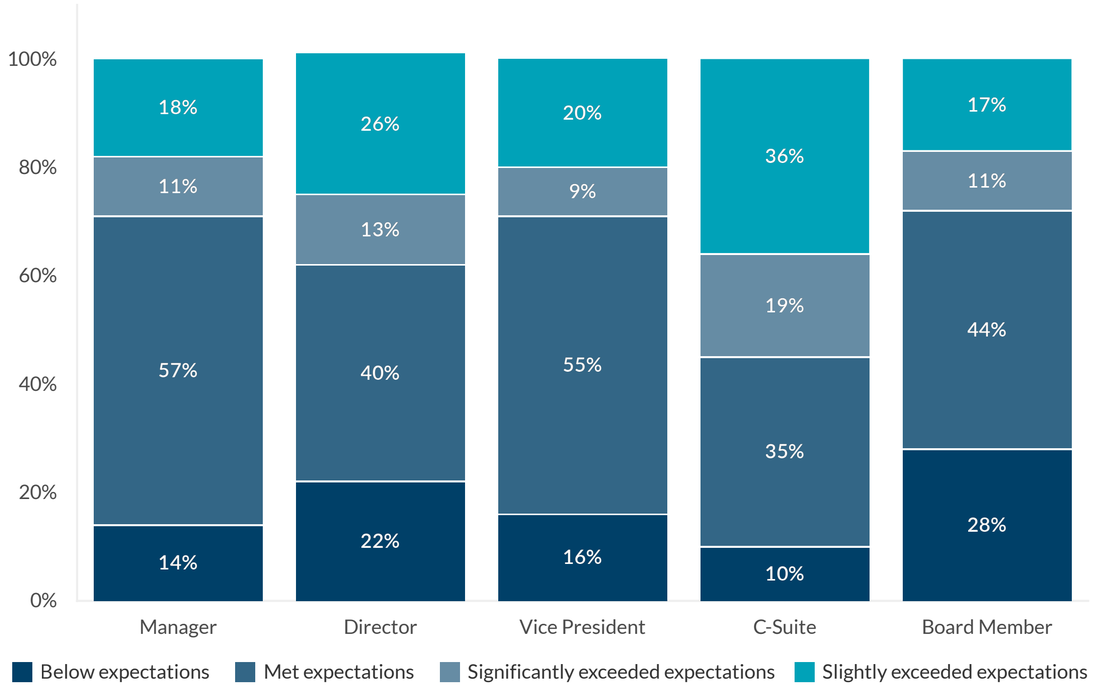
Figure 2: AI investment returns by maturity stage



C-suite sees AI benefits

The results show that C-suite executives are notably more optimistic about the ROI from AI, compared to those in other roles. This makes sense given that C-suite leaders have the broadest purview, which allows them to see multiple use cases and balance benefits across operations. Managers and directors, who have less exposure, tend to perceive fewer benefits. Board members, being further removed from day-to-day operations, also are less likely to see AI meeting expectations. This should inform organizations' strategy of diversifying use cases from a function, complexity and ROI outcome perspectives.

Figure 3: AI ROI expectations by roles



It is imperative that organizations develop a road map for progressing through different AI maturity stages, focusing on scaling AI applications, enhancing data infrastructure and investing in AI talent.

Key takeaways

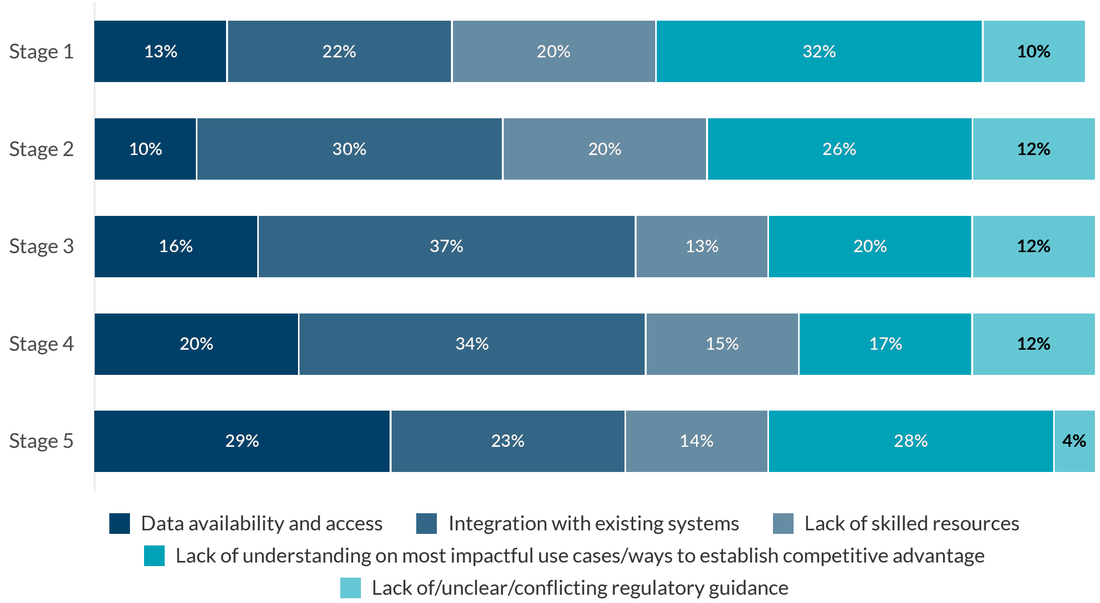
- High initial investments in AI can delay returns for organizations in the early stages of adoption, making it vital to set realistic ROI expectations in the early stages and demonstrate the potential to scale over time.
- The link between AI maturity stages and ROI satisfaction suggests that systematically enhancing AI capabilities can lead to better financial results. It is imperative that organizations develop a road map for progressing through different AI maturity stages, focusing on scaling AI applications, enhancing data infrastructure and investing in AI talent.
- While getting to the transformation stage is still rare across all sectors, there's a significant opportunity for early movers to gain competitive advantage by using AI not just for efficiency but also for innovation and market leadership.
- The tech sector's high ROI expectations and low dissatisfaction levels means it has largely overcome early stage challenges like poor implementation, lack of talent or unclear objectives. The sector's strong understanding and motivation to apply AI is clearly demonstrated by its use of its own technology. The tech sector's success is a guide: invest in people, infrastructure, and clear applications to boost ROI.

Challenges in optimizing AI

As organizations progress through different AI maturity stages, here's how their challenges evolve:

- **Stage 1:** The primary concerns are the lack of understanding of the most impactful AI use cases (32%), followed by the need for integration with existing systems (22%), and the shortage of skilled resources (20%).
- **Stage 2:** Integration issues come to the forefront (30%), overtaking the lack of understanding of the most impactful AI use cases (26%) and indicating that organizations are starting to identify viable use cases for AI but are challenged with incorporating it into existing systems.
- **Stage 3:** Integration becomes an even bigger priority (37%), while concerns about earlier issues around use cases and resources seem to dwindle. At this stage, data availability and access emerges as a significant challenge (16%), bested only by lack of understanding of the most impactful AI use cases and the integration issue.
- **Stage 4:** Data availability and access (20%) challenges become more pronounced, although the integration issue (34%) remains the top challenge.
- **Stage 5:** Data availability and access is the top challenge (29%), reflecting the advanced stage of AI maturity where organizations are now focused on leveraging data effectively. It is followed closely by the lack of understanding of impactful AI use cases (27%) and the integration issue (22%).

Figure 4: Biggest challenges in optimizing the use of AI by sector *(top 2 responses for each industry group)*



29%

of stage 5 maturity organizations view data availability and access as their biggest challenge to optimizing the use of AI, versus 13% of stage 1 and 10% of stage 2 organizations.

Key takeaways

- **The integration issue:** Many organizations rely on legacy systems that were not designed with AI in mind. Integrating AI with these older systems is challenging due to incompatible data formats, outdated architecture and limited application programming interface (API) capabilities.
  - Integration challenges peak in the middle stages of AI maturity, which suggests that developing a robust integration strategy early can alleviate these issues as AI deployment scales.
  - Fixing the issue is not merely about plugging in new technology; it requires a holistic approach that considers data compatibility, system architecture, change management and more.
- **The data problem:** Quality data is a real game changer for AI success, yet many overlook its importance, particularly in the early stages. Without proper data, even well-prepared infrastructures fall short. It's analogous to building a home office without a readily accessible power outlet. As projects mature, the gaps and challenges become more specific. You don't really know if your data is AI ready or of good quality until you start experimenting — and begin to uncover more challenges.
  - Organizations should prioritize data availability and quality from the beginning. This means assessing data needs during the governance and approval process and ensuring data is resilient and secure to support mission-critical applications.
  - Continuous monitoring and updating of data strategies will enhance project success.
  - Infrastructure must support the seamless integration and management of data.
- **Iterative learning:**The challenge of understanding AI use cases, both early and late in adoption, highlights the need for ongoing learning and adaptation. Organizations should remain agile and open to revisiting and refining their AI strategies as they progress.

30%

of all respondents identified integration with existing systems as their biggest challenge to optimizing AI.

Top AI Challenges

Figure 5a: Challenges stage 1 organizations face

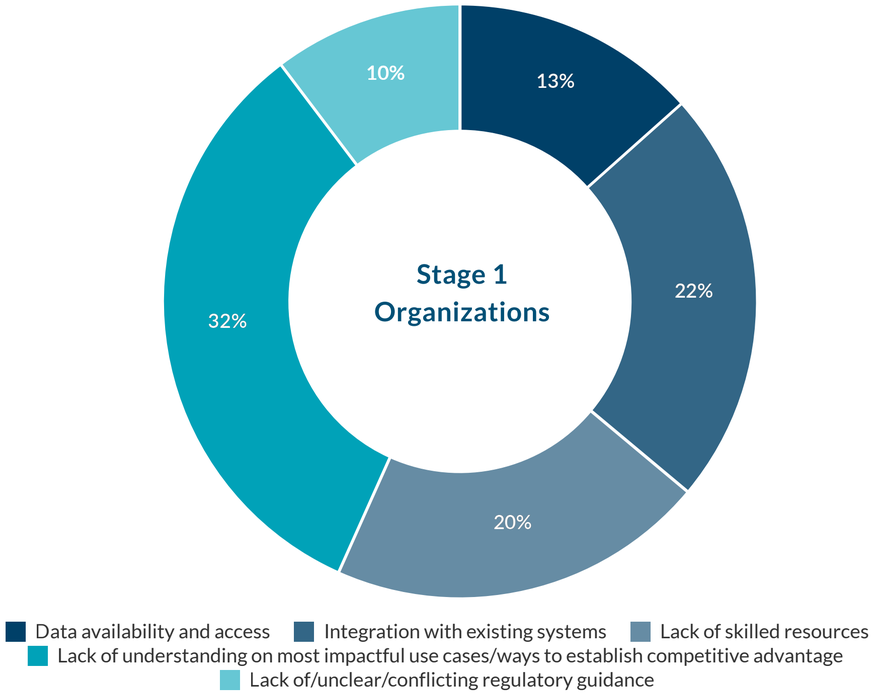
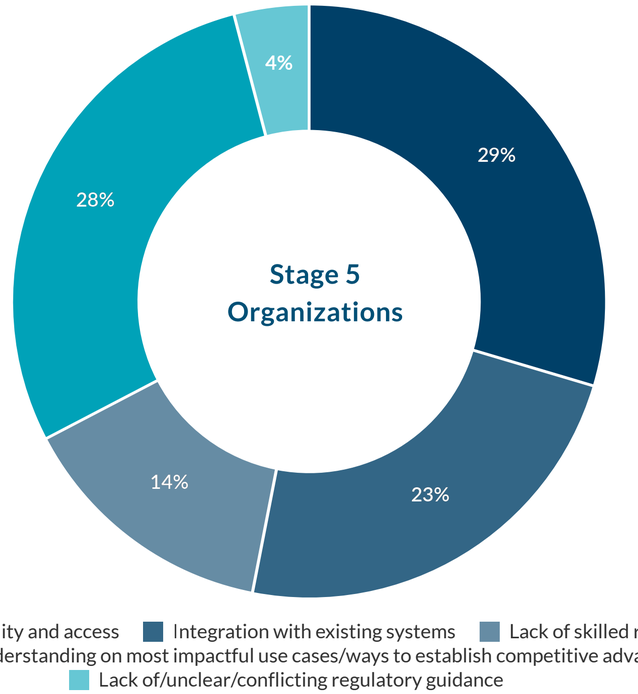


Figure 5b: Challenges stage 5 organizations face



"Other" responses are not shown in these graphs.

Achieving success with AI — Christine Livingston

Building a solid foundation in the early phases of AI experimentation and adoption is vital for success. The most common mistake isn't about setting expectations; rather, it's about not having a clear understanding of what you are trying to accomplish with AI in the first place. Without this clarity, it's challenging to maximize the full potential of AI and achieve the desired outcomes.

To build a solid foundation during the early phases of AI experimentation and adoption, business leaders should begin by asking fundamental questions, starting with "Why?" Specifically, why are you trying to incorporate or leverage AI, and what specific problems do you aim to solve?

Addressing AI challenges

The lack of structured approaches hampers many companies in developing AI solutions. As the survey shows, key challenges include the following:

- **Defining clear project objectives:** Without well-defined goals, projects can drift off course, wasting valuable resources.
- **Integrating AI into existing systems:** The "intelligence" in AI needs grounding in enterprise data and to be integrated seamlessly with existing systems to realize meaningful value.
- **Validating data reliability:** Ensuring data accuracy is essential for meaningful AI insights.

Understanding AI success

Expected returns on AI investments vary across organizations depending on their maturity level. More than half of organizations in early AI adoption stages report returns below expectations, compared to only 8% in advanced stages, indicating that moving past early experimentation stages is critical to achieving meaningful business value.

Perceived benefits also can change over time. For many companies, as they mature, their focus shifts from immediate cost savings to strategic growth, revenue enhancement and innovation.

> Successful organizations align AI strategies with business objectives, invest in quality data infrastructures and embrace cultural shifts to maintain a competitive edge.

Strategies for AI success

Envision: Identify the best AI opportunities and determine how to start by selecting appropriate tools, technologies and platforms. Evaluate potential scenarios and risks to ensure a balanced approach. Key questions include the following:

- What are the best opportunities for AI?
- What tools, technologies or platforms should I use?
- What problems am I trying to solve or what new products or offerings can I create?

Establish: Develop a strategy to ensure data readiness and assess the technical feasibility and risk profile of AI use cases. Consider these questions:

- Do I have the right data?
- Is the use case technically feasible?

Execute: Successful execution involves integrating AI into the existing technology stack and preparing the data environment. Follow industry best practices to maintain integrity and security. Questions to consider include the following:

- How do I integrate AI into my existing stack?
- How do I ensure that responsible AI principles are followed?

Evolve: Continuous testing and adapting of AI systems is necessary for long-term success. Regular audits and updates ensure compliance and efficiency. Key questions include the following:

- How can I continuously test and adapt my AI?
- How do I accelerate AI innovation without compromising risk management?

Leading the way in AI

Defining AI success involves more than technological prowess; it requires strategic integration and cultural transformation. Successful organizations align AI strategies with business objectives, invest in quality data infrastructures and embrace cultural shifts to maintain a competitive edge. Companies that encourage new ideas and stay ahead of the competition will lead the way in the future of AI, setting standards and influencing new technology.

Christine Livingston is a managing director and global leader of Protiviti's Artificial Intelligence practice, responsible for all AI-ML initiatives.

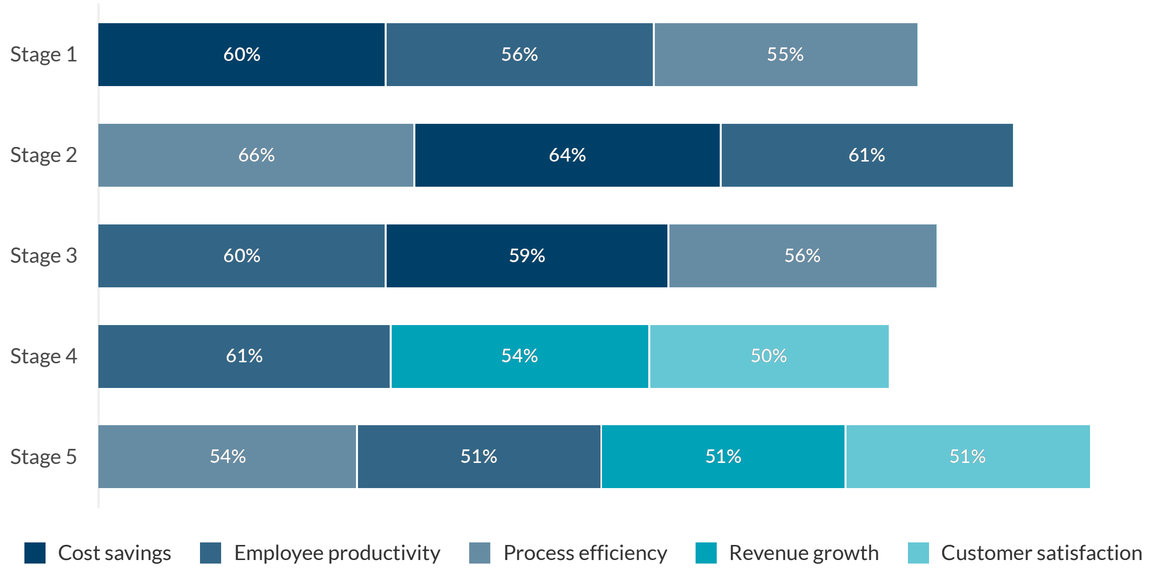
Perceived benefits of AI: What success looks like

How you measure AI success varies depending on where you sit in your organization. For instance, by a wide margin, respondents in sales selected cost savings (75%) as their top indicator for measuring AI success, followed by customer satisfaction at 54%. For compliance respondents, the two top indicators of success were process efficiency (84%) and employee productivity (80%). Finance respondents selected process efficiency (57%), cost savings (55%) and employee productivity (53%) as their topic indicators.

Industry perspectives on success also vary. Financial services respondents chose cost savings (58%), employee productivity (56%) and process efficiency (56%) as their most important indicators for measuring AI success. Meanwhile, for the consumer products and services group, process efficiency and cost savings (tied at 63%) were their top choices, followed by employee productivity (53%).

Overall, cost savings and employee productivity were cited as the most important indicators for measuring AI success, but the results show these indicators change with AI maturity.

Figure 6: Perceived benefits of AI based on stages of adoption



What the results say

- **Stage 1 (Early Beginners):** These organizations prioritize cost savings, with 60% of respondents considering it the most critical indicator. This is closely followed by employee productivity and process efficiency.
- **Stage 2 (Experimentation):** Process efficiency emerges as a strong focus, with two-thirds of respondents selecting it as a key measure.
- **Stages 3 to 5 (Defined to Optimized):** As organizations mature, there is a noticeable shift toward revenue growth, reflecting its increased importance in measuring AI success. This trend is supported by 54% of respondents, indicating a broader strategic alignment as organizations refine their AI capabilities. Employee productivity and customer satisfaction remain significant, underscoring their enduring relevance.

Why it matters:

For organizations across the AI maturity spectrum, these indicators are essential for aligning AI strategies with business goals and achieving measurable improvements.

Key takeaways

- The fact that cost savings and employee productivity are the most frequently cited indicators for measuring AI success underscores the universal importance of reducing costs and improving workforce efficiency across various sectors.
- The maturity stage of an organization significantly influences which indicators are perceived to be most important for AI success. As organizations progress through different stages, the focus gradually shifts from fundamental cost savings and process efficiency to a more balanced emphasis on productivity, efficiency and growth.
- Organizations should establish a continuous feedback loop to monitor AI performance and make necessary adjustments.
  - In measuring success, business leaders should also consider how AI projects will contribute to innovation and competitive advantage over time.
  - Organizations should involve all relevant stakeholders early in the AI journey to ensure buy-in and to set realistic expectations by helping to articulate what AI can realistically achieve.

Want to build momentum with AI? Think big, act fast — Bryan Throckmorton

It is clear from the survey results that companies with more mature AI capabilities are generating greater returns. The question then becomes, how do I build momentum and experience with AI so that I can progress through the stages to capture the most value? The era of slow, piecemeal AI implementation is over. Organizations need to move with speed when it comes to their AI efforts to not only succeed but also effectively manage risks and turn challenges into opportunities.

How do you do that? Here are a few ways to start:

- **Craft a clear AI strategy:** This strategy should focus on how you plan to add business value through specific use cases. Don't move forward on a use case unless you understand what value levers you are going to pull. If you can't create a spreadsheet with at least a back-of-the-napkin view of the potential value, perhaps it is best to start with another use case. Identify areas where AI can enhance productivity, reduce workloads and improve processes — this process requires a shift in behavior and mindset.
- **Balance big and small thinking:** Starting with use cases that can be easily prototyped and proven is the best way to begin. However, as you gain more experience, it is important to look at overall business processes holistically to see how they can transform. Whether this involves linking use cases or conducting some strategic exercises to explore the art of the possible, being able to think big and small helps drive impact.
- **Consider an AI Center of Excellence (COE):** Even leaders in the space sometimes struggle to consistently and repeatably deliver AI projects to the business. Consolidating limited AI resources and putting in place a target operating model for AI initiatives can help accelerate progression to maturity. A great operating model includes a risk framework to keep opportunities and risks in balance.

> Don't move forward on a use case unless you understand what value levers you are going to pull.

- **Rethink job roles and employee engagement:** Many organizations hesitate to rethink job roles due to fear of alienating their workforce. However, recent advancements in generative AI, like ChatGPT, show that employees can appreciate AI's benefits. Many are already using AI tools like Microsoft Copilot to simplify tasks, enhance creativity and boost efficiency.
- **Develop a solid AI communication strategy:** Communicate the highest-priority use cases and processes with the most transformation potential.
- Think big, act fast: The pandemic showed how quickly digital transformation can happen when survival is at stake. The rapid pace of AI technology means that both opportunities and risks abound, with both existing and new competitors looking to gain an advantage. Building the organizational muscle to move quicker will ensure success.

Bryan Throckmorton is a managing director at Protiviti and leads the Global Digital Strategy & Transformation segment.

Finding success: What organizations should do now

Success starts with capability building. Organizations in the early stages (1–2) of AI adoption should focus on building foundational skills, running pilot projects and proving ROI through efficiency gains — not just cost savings alone.

To progress, they must follow the blueprint for the middle stages (3–4), where the focus shifts to scaling infrastructure and data tools. Organizations can do this by prioritizing customer satisfaction and employee engagement, while aligning AI with strategic planning and governance.

Reaching the highest level, stage 5, will require market differentiation and customer-centric innovation. A shift in support needs toward advanced infrastructure and strategic foresight is key.

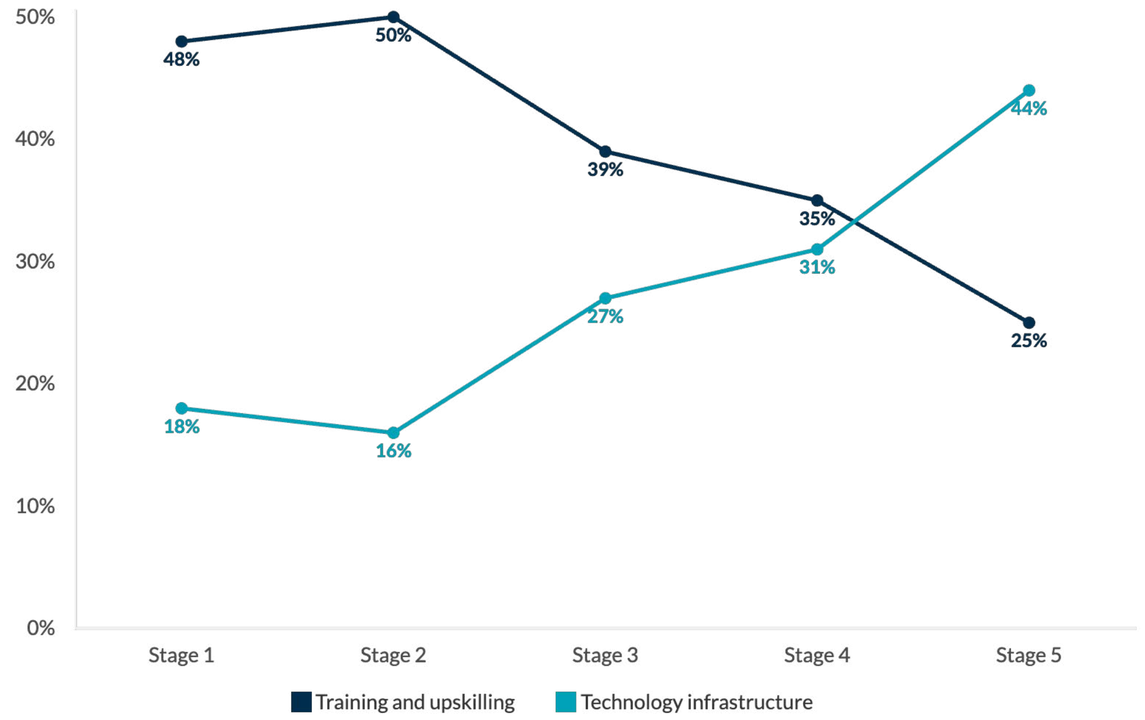
Across all stages, nontech sectors should study tech's best practices—such as agile experimentation, cloud infrastructure and AI talent strategies—to accelerate their own adoption. And every organization should be laser focused on people, processes and technology.

59%

of respondents consider employee productivity the most important measure of AI success.

As AI maturity rises, the need for better technology-infrastructure support increases while the need for training and upskilling support drops.

Figure 7: Support most needed for AI implementation



Here are a few recommendations to harness the full potential of AI:

People:

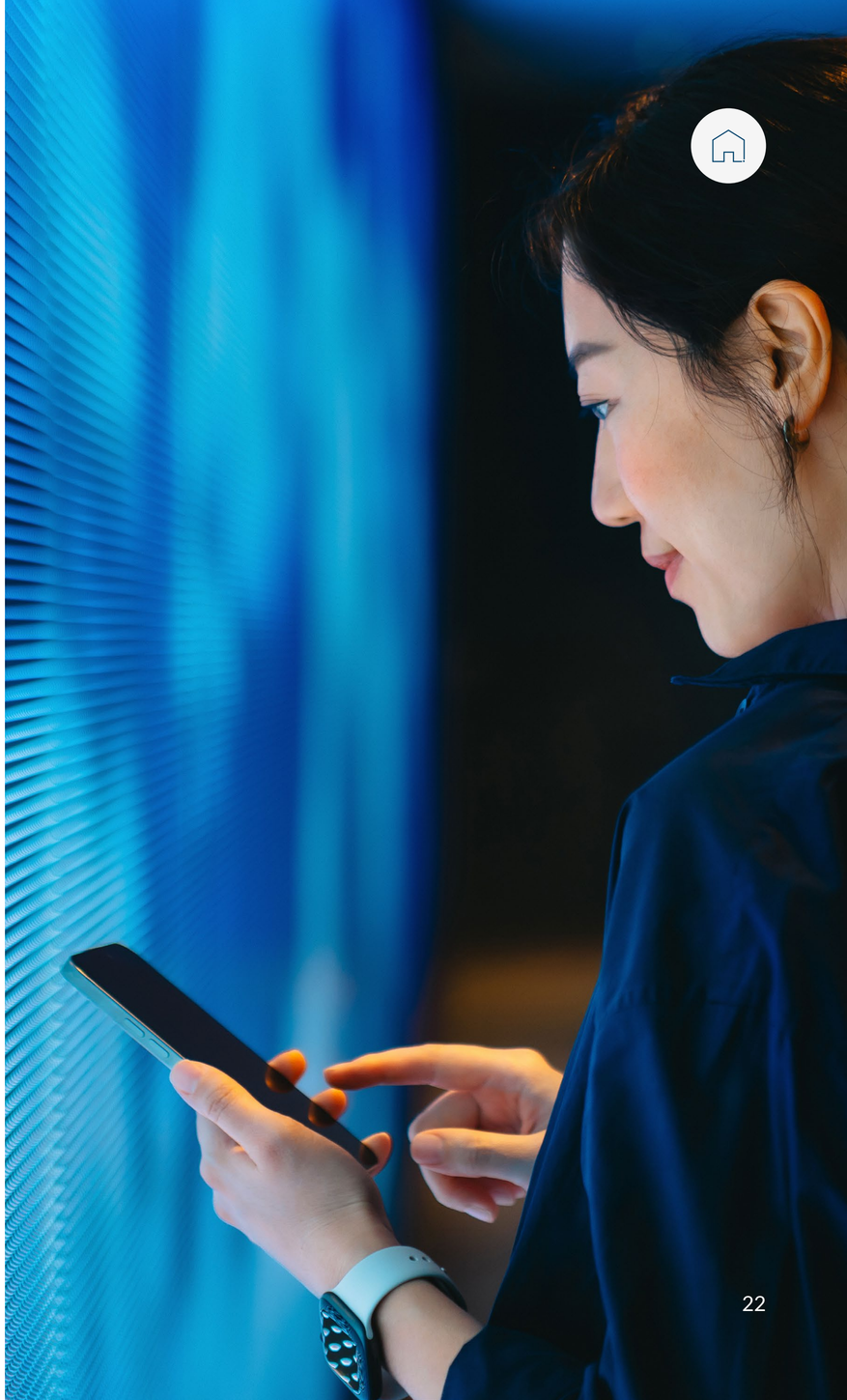
- Train and upskill the workforce with the goal of addressing the significant skills gap in AI literacy, technical capabilities or change management many organizations face.
- Learn and adapt continuously.

Process:

- Be clear-eyed about early-stage expectations and timelines for realizing value. Frame success in terms of customer outcomes and provide transparent performance measures.
  - Have clear use cases and establish specific, measurable goals for AI initiatives that align with business objectives.
  - Involve key stakeholders from the outset to gather insights and ensure alignment with business needs.
- Define how to measure the value of AI investments and track benefits like resource reduction.
- Develop robust data governance practices to ensure data quality, compliance and security that evolve with time and technology needs.

Technology:

- Consider factors such as the ability to integrate with existing systems, scalability, ease of use, support for specific use cases, data security, compliance with regulations, and vendor support and reputation.
- Design infrastructure to be scalable and adaptable to future needs.
- Configure monitoring tools to track AI performance and make iterative improvements based on feedback.
- Adjust measurements as you learn from the AI models and evaluate their impact.



Methodology and demographics

Sample size and technique

Protiviti launched its AI Pulse Survey program this year to gather insights from a broad range of leaders and professionals into how their organizations are currently using or preparing to use AI, where they see growth opportunities, and how they are addressing related challenges.

This first survey was conducted in March–April 2025. More than 1,000 participants (n=1,026) completed our questionnaire, including 176 C-suite executives as well as board members, vice presidents, and director- and manager-level professionals.

Among the notable highlights in the demographics of the survey:

- Responses were gathered from a diverse range of industries, led by the technology (11%) and manufacturing (10%) sectors.
- The largest single countries represented include the United States, with 42% of respondents, followed by India and the U.K. (10% from each country) and Japan (8%).
- There are similar levels of representation across organization size.
- There is broad representation among organization functions, led by IT (27%), operations (18%), finance (11%) and compliance (10%).

About Protiviti

Protiviti (www.protiviti.com) is a global consulting firm that delivers deep expertise, objective insights, a tailored approach and unparalleled collaboration to help leaders confidently face the future. Protiviti and its independent and locally owned member firms provide clients with consulting and managed solutions in finance, technology, operations, data, digital, legal, HR, risk and internal audit through a network of more than 90 offices in over 25 countries.

Named to the *Fortune* 100 Best Companies to Work For® list for the 10th consecutive year, Protiviti has served more than 80 percent of *Fortune* 100 and nearly 80 percent of *Fortune* 500 companies. The firm also works with government agencies and smaller, growing companies, including those looking to go public. Protiviti is a wholly owned subsidiary of Robert Half Inc. (NYSE: RHI).

AI capabilities: AI stands at the forefront of innovation and is revolutionizing the way businesses operate and compete. AI is critical to define the trajectory of future growth and value. The opportunity is vast and balance is key to strategic and responsible use of AI.

We deliver cutting-edge AI solutions, helping you leverage existing AI technologies or build custom solutions for your enterprise. We also have our own proprietary AI platform that our teams leverage to deliver value faster and that can be used for accelerators and enablers for your organization. Our unique approach leverages your existing data and technology landscape to help you make the most from your investment.

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