2024

Report on AI Maturity in Business Services

Prepared by
Office Samurai and ABSL

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The Next Frontier: Navigating Today's Landscape for a Smarter Tomorrow

Konnichiwa, AI enthusiasts and explorers!

It's always fascinating to see where we stand on the ever-evolving landscape of artificial intelligence, and this survey conducted by Office Samurai and ABSL gives us quite a comprehensive snapshot of our current position and future aspirations.

The report reveals AI maturity levels across organizations are a mixed bag. While some companies are leading the charge with well-defined strategies and advanced implementations, many are still dipping their toes in the AI waters. Not much surprise there, this variation is expected given the diverse challenges and opportunities AI presents.

Robotic Process Automation continues to be the most mature and widely adopted technology. It's clear that RPA has proven its worth in enhancing operational efficiency and productivity by automating repetitive tasks. For those who haven't fully embraced RPA yet, the time is ripe to consider it as the cornerstone of your automation strategy.

Technologies like Intelligent Document Processing, Machine Learning, and AI Conversational Platforms are gaining traction but are still in the early to mid-adoption phases for many. Generative AI, the new kid on the block, is understandably at the earliest stage, with organizations cautiously exploring its potential through pilot projects.

However, it's not just about adopting technology. The strategic integration of AI requires a robust support system—infrastructure, talent, and a culture that embraces continuous innovation and ethical considerations. This is where I see a crucial gap in many SSC/BPO strategies. It's not sufficient to onboard AI capabilities; fostering an environment where these technologies can thrive is equally important.

The report also highlights one essential, yet often overlooked, aspect: the readiness to embrace future AI trends. It's comforting to see organizations actively planning to upscale their AI initiatives.

However, the mix of optimism with a dose of realism—acknowledging the challenges of data management, ethical AI use, and the need for skilled personnel—paints a balanced picture of the road ahead

All in all, the report seems to paint a cautiously optimistic picture of the future of AI in SSC and BPO sectors. With a strategic approach and a focus on overcoming challenges, our organizations are well-positioned to harness the transformative power of AI. As we continue on this journey, staying informed and agile (especially as technological reality changes rapidly) will be key to reaping the full benefits of AI technologies.

I'm really curious, as always when we get new toys to play with, what happens next. On one hand it feels expectations towards AI technologies are overhyped, especially as to what they can bring us in 3-5 years. On the other, it feels those technologies have a potential to be to our world what the internet or mobile phones once were – a technology that redesigns how we do basically eveything.

One way or another, it feels we have no choice but to embrace the AI revolution. But we do need to do it with a clear vision, robust strategies, and a collaborative spirit. The future of AI in our industry seems bright, and together, we can lead the charge towards greater innovation and efficiency.

Let's give it a try, and see what the future holds.

Łukasz Czajkowski

Membership Relations & Strategy Director

ABSL

Embracing AI: A Pragmatic Approach

As we navigate through the evolving landscapes of the SSC/BPO sector, the integration of artificial intelligence seems not just necessary but inevitable. Our recent dialogues with ABSL member companies explored the multifaceted implications of AI in our sector, highlighting both the opportunities and the challenges it presents.

Firstly, the perception of AI as an opportunity rather than a threat is prevalent among the leadership within firms in our association. I feel this sentiment is rooted in a deep understanding of the business and the competencies we have nurtured over the years. AI technologies, particularly the latest generative models, offer tremendous potential to enhance efficiency and performance. However, it's crucial to recognize that the real value of AI comes from its implementation in well-structured environments where data is organized and accessible.

One of the significant advantages of AI is its ability to automate the remaining mundane and repetitive tasks we haven't been able to automate with other technologies (like RPA). This shift not only optimizes operations but also frees up our skilled workforce to focus on more complex and value-added activities. For instance, customer service roles, traditionally human-dominated, are increasingly seeing AI-driven efficiencies. This transition not only improves operational capacity but also enhances the customer experience, a critical factor in the competitive SSC/BPO landscape.

However, the integration of AI is not without its hurdles. Data privacy, security concerns, and the need for substantial investments in technology infrastructure are significant challenges, even for big enterprises. On top of that, the cultural shift towards adopting these technologies requires a considerable amount of change management, ensuring all levels of the organization are aligned and competent in utilizing these new tools. While AI brings automation and efficiency, it also necessitates a parallel investment in upskilling and reskilling our workforce. The digital transformation is not merely about technology, but about people.

Ensuring our teams are equipped with digital skills is as crucial as the technology itself. In this regard, AI can also serve as an educational tool, enhancing learning and development within the organization.

While AI will undeniably play a crucial role in the evolution of our sector, it is important to maintain a balanced perspective on its impact. The transformative power of AI is significant, yet it is not a panacea that will completely reinvent or dismantle the existing structures of SSCs and BPOs overnight. Instead, AI should be viewed as a potent tool that enhances our capabilities, streamlines our operations, and enables us to deliver services more effectively. The future will likely see AI integrating more deeply into our everyday functions, supporting rather than replacing the human elements that remain vital to our operations. This technology will empower us to achieve higher levels of efficiency and innovation, but the core of our industry – built on human expertise and nuanced decision-making – will continue to thrive alongside these advancements.

In conclusion, while the road to fully integrating AI into our operations might seem daunting, it is a journey worth embarking on. The strategic implementation of AI promises not only to enhance operational efficiency but also to propel our sector towards more innovative and value-driven horizons. Let us move forward with cautious optimism, embracing the changes that AI brings while preparing our teams for the digital future ahead.
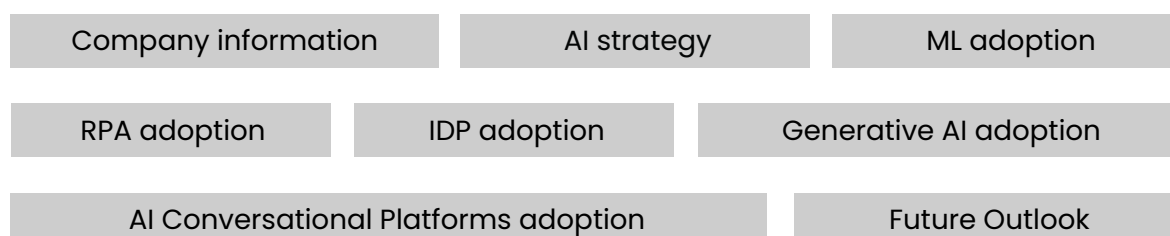
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Introduction

Artificial Intelligence (AI) is a rapidly evolving field that offers tremendous opportunities for innovation and transformation in various sectors and domains. AI can enhance productivity, efficiency, quality, and customer satisfaction, as well as create new value propositions and business models. However, AI also poses significant challenges and risks, such as ethical, legal, social, and technical issues, that require careful consideration and management.

To understand the current state and future trends of AI adoption within the Shared Service Centers (SSC) and Business Process Outsourcing (BPO) organizations, Office Samurai and ABSL conducted a survey between December 19, 2023 and January 24, 2024. The survey aimed to evaluate the AI maturity level of the participating organizations, as well as their AI strategy, use cases, challenges, and expectations. The survey also explored the adoption of specific AI technologies, such as Robotic Process Automation (RPA), Intelligent Document Processing (IDP), Machine Learning (ML), AI Conversational Platforms, and Generative AI.

The survey received **48 responses** from SSCs and GBSs operating in various industries and regions in Poland. The respondents represented different levels of seniority, roles, and functions within their organizations. The survey consisted of eight sections, covering the following topics:

Company information	AI strategy	ML adoption
RPA adoption	IDP adoption	Generative AI adoption
AI Conversational Platforms adoption		Future Outlook

This report presents the main findings and insights from the survey, as well as some recommendations and best practices for enhancing the AI maturity level of SSCs and GBSs.
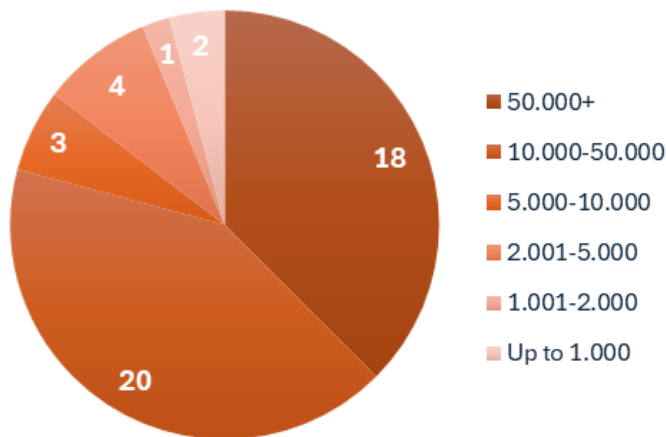
01

Survey participants

Responder size

The survey participants represented a wide range of company sizes, from small enterprises with less than 1,000 employees to large corporations with more than 50,000 employees.

Size of the whole group

|	
■ 50.000+	
■ 10.000-50.000	
■ 5.000-10.000	
■ 2.001-5.000	
■ 1.001-2.000	
■ Up to 1.000	

10 000 +

The majority of the respondents (38 out of 48) belonged to companies with more than **10,000** employees globally.

The size of the shared service / BPO organizations also varied, both in Poland and globally. The most common size category in Poland was 210-500 FTEs (15 out of 48), followed by more than 1,000 FTEs (14 out of 48). Globally, the most common size category was more than 1,000 FTEs (29 out of 48), followed by 501-1000 FTEs (8 out of 48). Globally, the most common size category was more than 1,000 FTEs (29 out of 48), followed by 501-1000 FTEs (8 out of 48).

Size of the Shared Service / BPO organization (FTEs) - In Poland
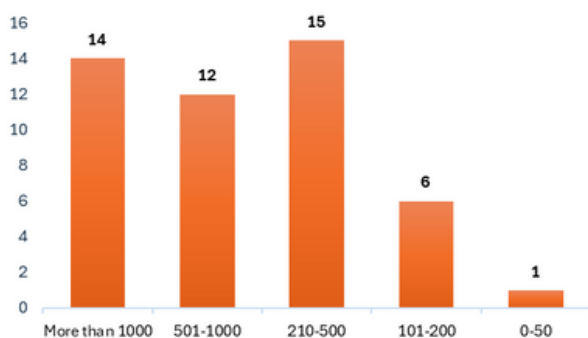
Size of the Shared Service / BPO organization (FTEs) - Globally
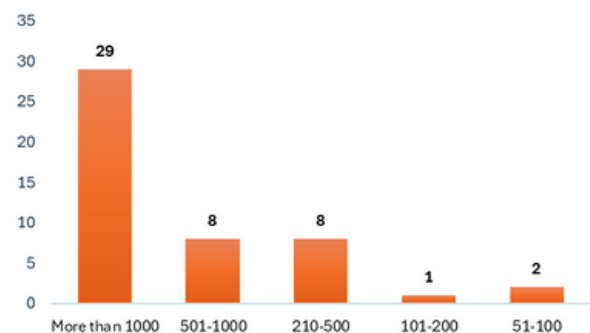
SSC/BPO maturity

The data on the age of SSC/BPO organizations reveals significant insights into the maturity of these centers in terms of their establishment and potential operational development.

Long-established (10+ years)

With 22 organizations falling into this category, it suggests that a significant portion of the SSC/BPO sector is mature, having over a decade of experience. These organizations are likely to have well-developed processes, extensive knowledge of the industry, and possibly a higher level of sophistication in their services.

Moderately Established (6-10 years)

20 organizations are in this range, indicating they are past the initial stages of development and are likely expanding or optimizing their operations. This maturity level suggests they have overcome early challenges and are in a phase of consolidation and growth.

Developing (3-5 years

5 organizations are relatively newer, which may indicate recent investments in the SSC/BPO sector. These companies might still be in the process of defining their core processes and may have less experience with advanced technologies compared to their more established counterparts.

Newly Established (0-2 years)

Only 1 organization falls into this category, and we welcome this organization into the fold.

Overall, the maturity data reflects a well-established sector with a majority of organizations having a significant history of operation, which could correlate with a higher adoption and integration of advanced practices and technologies, including AI. This established base provides a solid foundation for leveraging new technologies to further enhance operational efficiencies and service offerings.

Age of SSC/BPO (years)
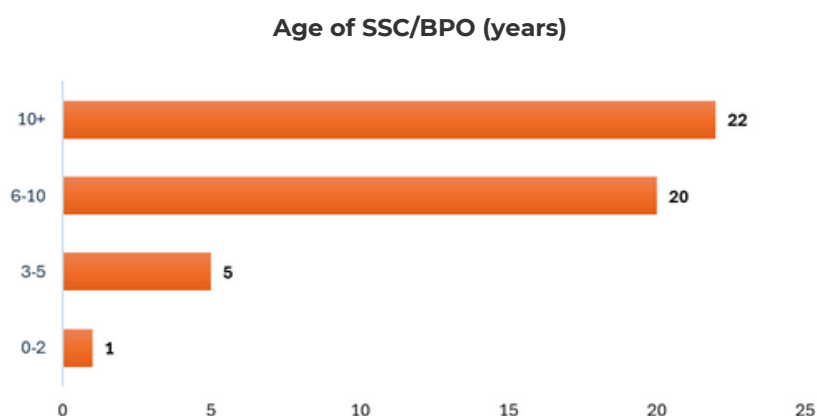
Functions

According to the data, the most prevalent function managed within these centers is Finance, with 32 organizations indicating its presence, underscoring the critical role of SSCs in financial operations and management. IT functions are also significantly represented in 29 organizations, highlighting the importance of technology and information management in modern business practices. Customer Support and Procurement are also key functions, noted in 23 and 24 organizations respectively, which points to the SSC/BPO sector's role in enhancing customer interaction and supply chain efficiency.

Human Resources (HR) functions are managed by 19 organizations, reflecting the SSC's involvement in managing and optimizing employee-related processes. Beyond these core areas, SSCs and BPOs are increasingly incorporating diverse functions such as Marketing, Compliance, Audit, and Legal services, indicating a broadening of the scope beyond traditional areas. More intriguingly, some centers are delving into strategic domains like Financial Crime, Continuous Improvement & Robotic Process Automation (CI&RPA), and even corporate strategy. This expansion into high-value areas demonstrates the evolving role of SSCs and BPOs in driving not only operational efficiencies but also strategic initiatives within their parent organizations.

Main functions

Finance 32 · IT 29 · Procurement 24 · Customer Support 23 · HR 19
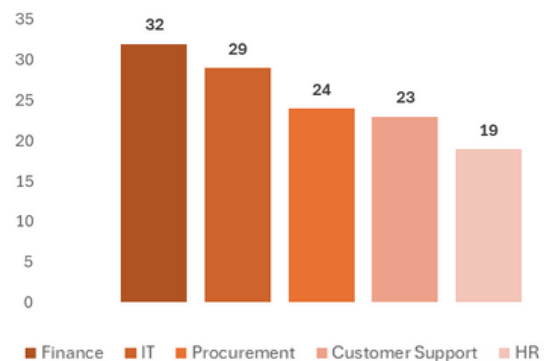
Geography

The survey included companies having their SSC/BPO centers in several major Polish cities, with Wrocław hosting the most SSC/BPO locations (14), closely followed by Kraków and Warsaw (13 each).
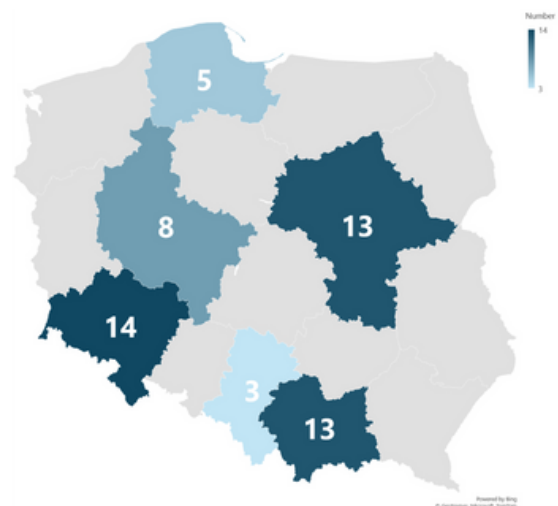
02

# AI strategy

Office Samurai and ABSL

The survey illustrates a broad spectrum of engagement with AI within the SSC and BPO sector. While a substantial number of organizations acknowledge the importance of AI and are actively developing strategies, others remain in exploratory phases or have not yet recognized AI as a significant factor in their business strategy. This variability highlights the dynamic nature of AI adoption, influenced by factors such as industry-specific needs, organizational capacity, and technological maturity.

AI vision and strategy

Answers show a diverse landscape of AI adoption and strategic planning. A group of early adopters, consisting of 12 organizations, have already established a clear AI vision and strategy, showcasing their proactive approach towards harnessing AI for strategic advantage. In contrast, the majority of organizations, with 21 responses, are still in the process of defining their AI strategies. This group represents the bulk of organizations, actively working towards understanding and integrating AI but not yet fully committed to a definitive path.

On the other end of the spectrum are the late adopters; 10 organizations have not yet begun to formulate a clear AI strategy, highlighting potential developmental delays or challenges in recognizing the benefits of AI. Additionally, 5 responses indicated uncertainty about their AI strategy status, which may suggest a nascent stage of AI consideration or a lack of clear communication within those organizations.

**Has your organization defined a clear AI vision and strategy?**
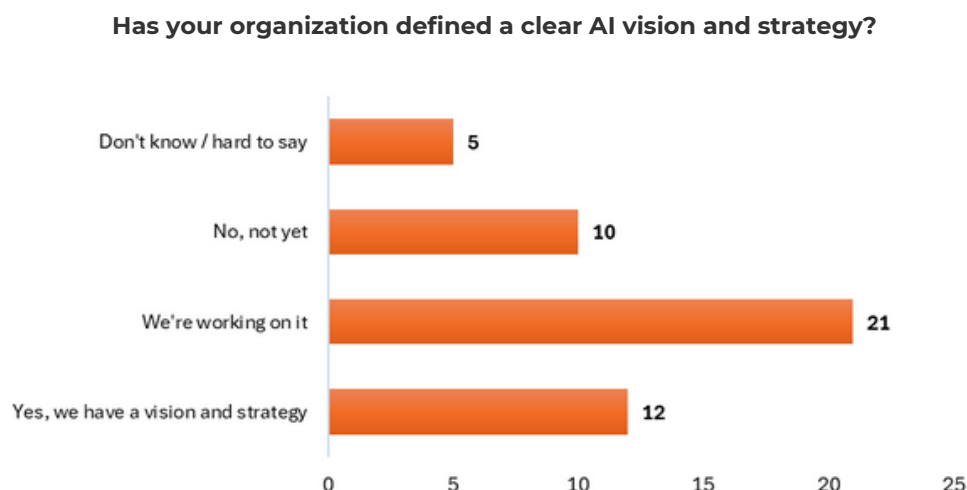
Role of AI in your long-term business objectives

Fourteen organizations consider AI a key strategic component, emphasizing its critical role in operations and as a driver of innovation. An equal number, another fourteen, view AI as a supporting technology that enhances processes but is not central to their business strategy, showcasing a pragmatic approach that focuses on incremental improvements. Closely following these groups, thirteen organizations are still exploring AI through pilot projects or limited-scale implementations, adopting a cautious and evaluative approach to ascertain AI's potential benefits before making substantial commitments.

Notably, only one organization reported that AI plays no role in their business, which might indicate either a lack of relevance or a deliberate decision against AI technologies in their particular context. Furthermore, six responses indicated uncertainty about the role of AI, possibly reflecting unclear outcomes from ongoing projects or undefined strategic goals related to AI. This distribution highlights the varied approaches and stages of AI integration across the sector.

How would you describe the role of AI in your long-term business objectives?
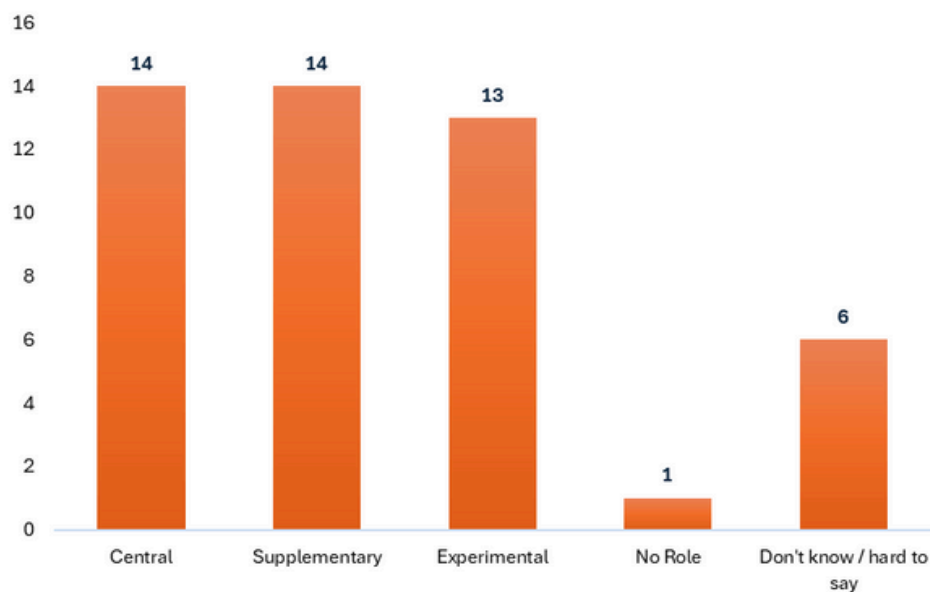
Central:	AI is a key component of our business strategy, essential for operations and driving innovation.
Supplementary:	AI supports and enhances our business processes and operations but is not the main focus.
Experimental:	We are exploring AI's potential through pilot projects or limited-scale implementations.
No Role:	AI is not used in our business and there are no current plans to integrate it in the future.

03

Robotic Process Automation (RPA) Adoption

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RPA (Robotic Process Automation) is a transformative technology that plays a pivotal role in modernizing business services, particularly within Shared Service Centers (SSC) and Global Business Services (GBS). RPA involves the use of software robots or "bots" to automate repetitive, rule-based tasks that were previously performed by humans. These software robots are designed to mimic human actions by interacting with digital systems, applications, and data, thus allowing organizations to streamline their operations, enhance efficiency, reduce errors, and achieve substantial cost savings.

Examples of RPA tools would be UiPath, Automation Anywhere, BluePrism, Microsoft Power Automate.
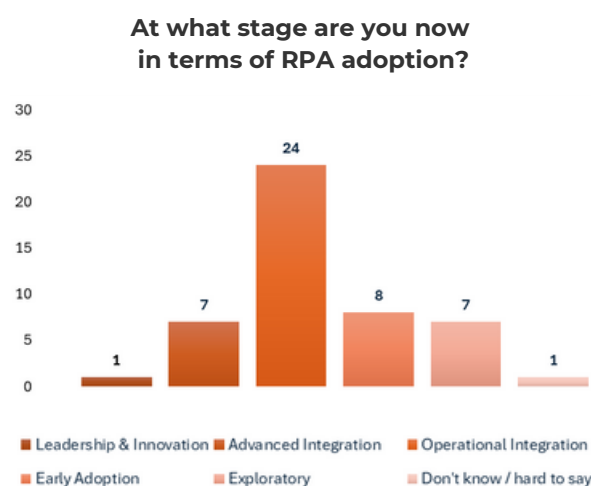
Current Stages of RPA Adoption

Given the maturity of Robotic Process Automation (RPA) as a technology, the current stages of RPA adoption across various organizations might come as a surprise, with fewer companies at the forefront than might be expected. Despite RPA's established role in enhancing operational efficiency, only one organization reports being at the leading edge, continuously innovating and setting industry benchmarks. Seven organizations have managed to achieve advanced integration, where RPA is deeply embedded across multiple functions, driving significant transformations and value.

Interestingly, the majority, consisting of 24 organizations, is at the operational integration stage, experiencing tangible benefits from RPA but possibly still exploring its full potential. Eight organizations remain in the early adoption phase, engaging in pilot projects or proofs of concept, without fully committing RPA into their mainstream operations.

This indicates a cautious approach, potentially due to the complexity of integrating RPA at a deeper level. Another seven are still in the exploratory phase, merely assessing RPA's potential without moving towards active projects. Additionally, one respondent was uncertain about their organization's current stage of RPA adoption.

At what stage are you now in terms of RPA adoption?

- Leadership & Innovation
- Advanced Integration
- Operational Integration
- Early Adoption
- Exploratory
- Don't know / hard to say

This spread of adoption levels highlights a significant gap between the potential of RPA technology and its actual implementation in industry practices. Given the proven benefits and capabilities of RPA, one might have expected a more advanced adoption curve across the sector.

Future Plans for RPA Adoption

Despite the established nature of Robotic Process Automation (RPA) technology, the future plans for RPA adoption indicate a strong desire among organizations to further expand and refine their use of this technology. While four organizations are considering re-evaluating their strategies, potentially pivoting or dialing down their efforts, this re-assessment suggests a recalibration rather than a retreat, aiming to align RPA more closely with evolving business needs.
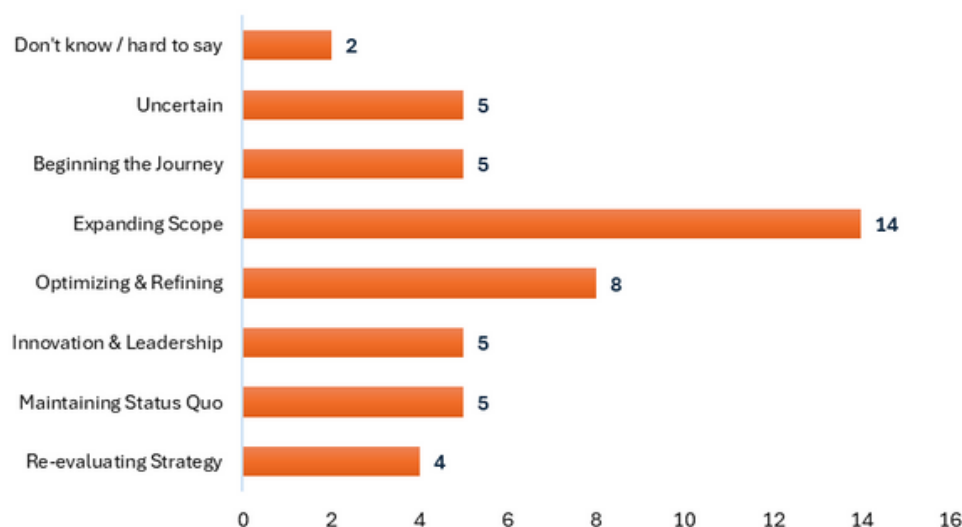
Conversely, an ambitious group of fourteen organizations is planning to significantly scale their RPA initiatives, aiming to integrate automation into more operational areas. This underscores a widespread recognition of RPA's potential to enhance efficiency and effectiveness across broader aspects of business operations. Additionally, five organizations are determined to push the boundaries of their existing RPA applications, seeking breakthrough innovations and aiming to set new industry benchmarks.

Meanwhile, eight organizations are concentrating on optimizing and refining their existing RPA solutions, indicating that while RPA is well-integrated, there is still substantial work to be done to maximize its impact. Another five organizations are at the starting blocks, just beginning to explore RPA with initial pilot projects, reflecting ongoing interest and the perceived potential of RPA within their operational frameworks.

However, it's notable that an equal number of respondents remain uncertain about the direction of their RPA initiatives. This uncertainty, coupled with the diverse approaches to RPA adoption, highlights both the challenges and opportunities that lie ahead as organizations strive to leverage RPA technology more effectively.

The landscape of RPA adoption is dynamic, with much progress still to be made in fully realizing the benefits of this powerful technology.

What best describes your company's RPA adoption plans for the next 1-3 years?

Category	Value
Don't know / hard to say	2
Uncertain	5
Beginning the Journey	5
Expanding Scope	14
Optimizing & Refining	8
Innovation & Leadership	5
Maintaining Status Quo	5
Re-evaluating Strategy	4

Impact expectations of RPA Adoption

In the landscape of RPA adoption, the anticipated impact of the technology paints a picture of a sector that largely views RPA as a standard tool rather than a revolutionary force. While seven organizations believe RPA will be transformational, significantly redefining core operations and altering business models, this relatively small number suggests that many may be looking beyond RPA to more advanced technologies to drive substantial business transformation.
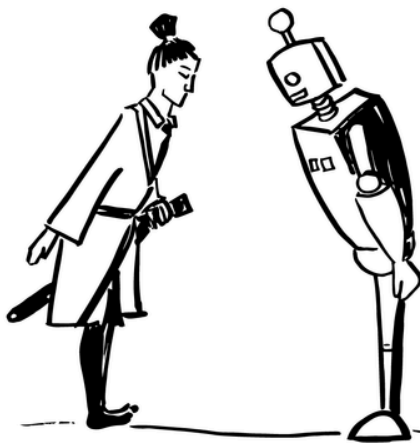
The largest group, consisting of 24 organizations, expects only moderate benefits from RPA, noting noticeable improvements in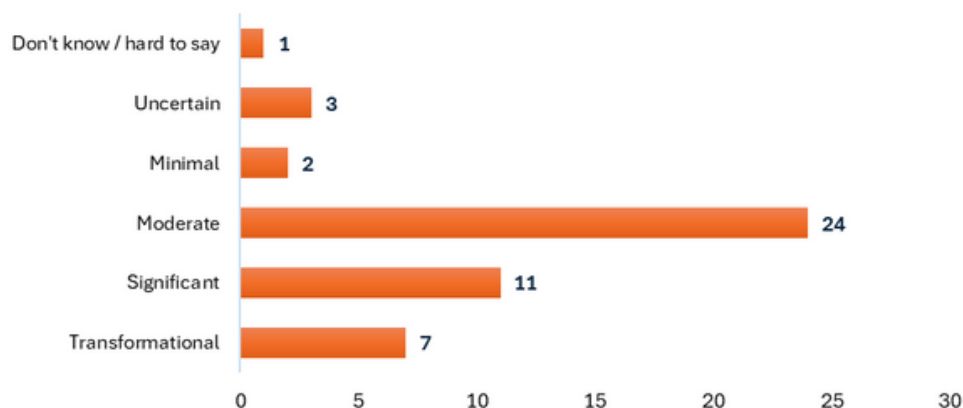 specific areas but not across the entire organization. This perspective underscores RPA's role as a standard enhancement tool rather than a disruptor in these settings. Additionally, eleven organizations predict significant improvements that will enhance several departments, though they do not anticipate changes to the core business model, further indicating that RPA is integrated into existing structures rather than reshaping them fundamentally.

Interestingly, only two organizations see RPA having a minimal influence, affecting just a few isolated tasks, and three respondents remain uncertain about the impact RPA will have on their operations. This small number of minimal and uncertain expectations highlights how RPA has become an accepted part of operational strategy in the sector, with most organizations recognizing its value and integrating it to some degree.

How significant of an impact do you expect RPA to have on your organization in the next 1-3 years?

Category	Value
Don't know / hard to say	1
Uncertain	3
Minimal	2
Moderate	24
Significant	11
Transformational	7

The data reflects a maturity in the adoption of RPA, where its benefits are recognized but seen as part of a broader technological toolkit **rather than the sole driver of future innovation.**

RPA Adoption Conclusion

Survey results on Robotic Process Automation (RPA) adoption highlights significant progress within SSC/BPO sector. While the current stages of RPA adoption vary, with only a few organizations at the cutting edge, a substantial number **have achieved advanced integration**, driving significant transformations and reaping tangible benefits.
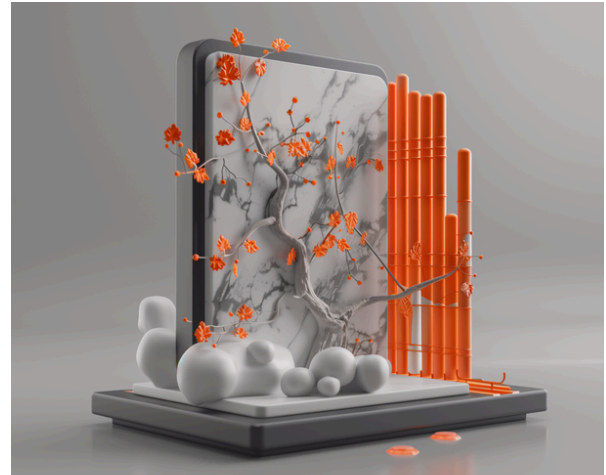
The future plans for RPA are optimistic, with many organizations aiming to scale their initiatives and push the boundaries of their existing applications.

The anticipated impact of RPA reflects its growing acceptance as a vital enhancement tool, with moderate to significant improvements expected across multiple departments.

This progress underscores the strides already made in leveraging RPA technology, paving the way for continued advancements and a more efficient, streamlined future in business operations.

Konrad Mierzwa

Technical Lead

Office Samurai

Unleashing the Hidden Potential: How AI-enhanced RPA can revolutionize business automation

It's pretty common for companies to feel uncertain or unaware of the impact new technologies might have. Not every company has fully explored the possibilities and potential. What's surprising, though, is how rarely companies report minimal impact. This suggests that those who do investigate the potential of a technology almost always find it significant or high.

RPA (Robotic Process Automation) stands out as a particularly interesting area. It's already implemented in most firms and has the highest level of deployment. Despite this, the expected impact of RPA is often rated as moderate compared to AI-related areas, which are seen as having high or breakthrough potential. I believe RPA isn't getting the recognition it deserves right now. The moderate potential might be because many companies have been using RPA for a few years and have already automated the most profitable processes. Additionally, RPA has traditionally been limited to automating repetitive, rule-based tasks. This limitation might contribute to the perception of its moderate potential, as companies recognize that RPA, in its classical form, cannot handle more complex, non-linear processes without significant AI integration.

However, we shouldn't overlook the connections between different technologies. RPA integrates exceptionally well with IDP (Intelligent Document Processing) and GenAI (Generative AI). By leveraging technologies like IDP and GenAI, companies can discover new, highly profitable processes to automate.

Robots can now process unstructured data directly from customers and employees, including entire email inboxes, tickets, documents, and recordings of customer interactions. Therefore, the potential of AI technologies like IDP and GenAI should boost the potential of RPA.

At Office Samurai, we focus mainly on process automation and improvement, and we spend a lot of time developing skills for integrating AI into RPA. We conduct extensive research and generate many proof of concept projects. This approach allows us to see the benefits that RPA projects, enhanced with IDP and GenAI, can bring, while keeping costs lower than developing full AI applications and infrastructure. Therefore, I highly recommend that SSC/BPO organizations pay special attention to this aspect.

By embracing these technologies, companies can achieve significant improvements in efficiency and productivity. Integrating AI with RPA can automate even more complex and valuable processes, driving innovation and competitive advantage.

04

Intelligent Document Processing (IDP) Adoption
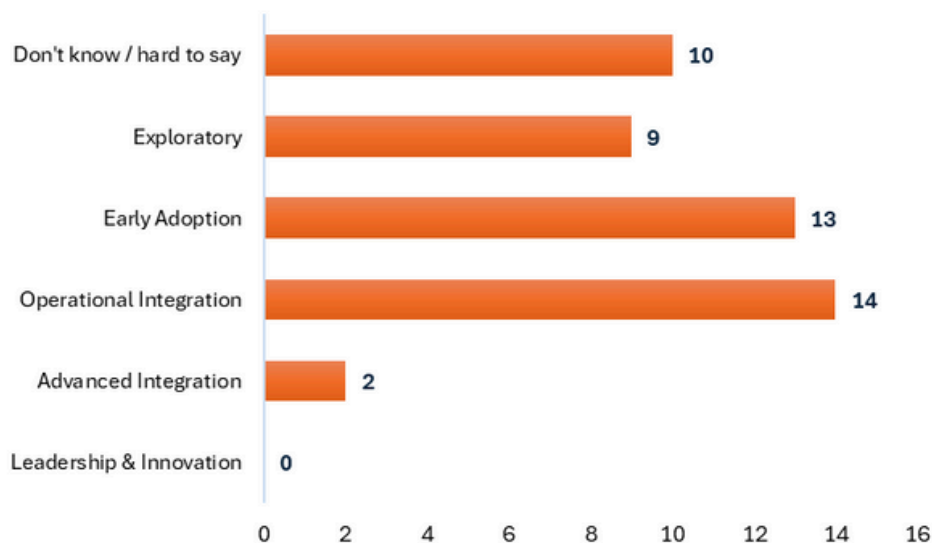
Office Samurai and ABSL

Intelligent Document Processing (IDP) is a technology that combines Optical Character Recognition (OCR) with advanced machine learning algorithms to extract and process data from various types of documents such as invoices, contracts, forms, and emails. It automates the extraction of structured and unstructured data, helping businesses streamline document-centric processes.

Current Stages of IDP Adoption

Notably, no organizations claim to be at the forefront of IDP integration, suggesting that IDP is not yet seen as a benchmark-setting technology within the industry. Only two organizations have reached a stage of advanced integration where IDP is well-incorporated across multiple functions, driving significant value and transformations. The largest group, consisting of 14 organizations, has operational integration, reporting tangible benefits from IDP in several processes.

A similar number, 13 organizations, are in early adoption, having initiated pilot projects or proofs of concept but not yet integrating IDP into mainstream operations. Nine are still merely exploring the potential of IDP without active projects, and a significant number of respondents, ten, were uncertain about their current stage of IDP adoption.

At what stage are you now in terms of IDP adoption?

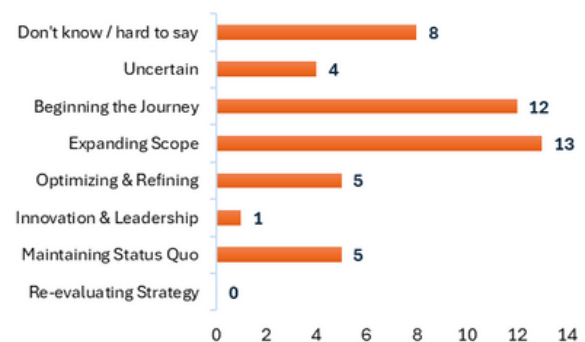| Stage	Value
Don't know / hard to say	10
Exploratory	9
Early Adoption	13
Operational Integration	14
Advanced Integration	2
Leadership & Innovation	0

Future Plans for IDP Adoption

Looking ahead, 13 organizations plan to expand the scope of their existing IDP initiatives, integrating them into more operational areas, suggesting a readiness to increase IDP's footprint within their processes. Similarly, 12 are at the beginning of their journey, planning to start exploring IDP through pilot projects or proofs of concept, indicating a growing interest in testing IDP's utility. Only five organizations are focused on optimizing and refining their existing IDP solutions, and the same number intend to maintain their current level of operations without significant changes.

Notably, just one organization aims for innovation and leadership in IDP, hoping to push the boundaries of current applications and set industry benchmarks. Uncertainty still marks the plans of four organizations regarding the future direction of their IDP initiatives, and eight could not specify their plans.

What best describes your company's IDP adoption plans for the next 1-3 years?

Category	Value
Don't know / hard to say	8
Uncertain	4
Beginning the Journey	12
Expanding Scope	13
Optimizing & Refining	5
Innovation & Leadership	1
Maintaining Status Quo	5
Re-evaluating Strategy	0

Impact Expectations of IDP Adoption

In terms of expected impact over the next 1-3 years, the majority, 16 organizations, anticipate moderate benefits from IDP, suggesting noticeable improvements in specific areas but not across the entire organization. Eleven expect significant improvements across several departments, although they do not foresee changes to the core business model. Only three organizations predict a transformational impact from IDP, suggesting a conservative expectation about IDP's potential to radically alter business models. Another three see only a minimal influence from IDP, indicating limited expectations for its integration. Uncertainty about the impact remains for five organizations, reflecting the ongoing challenges in gauging the outcomes of IDP adoption.

How significant of an impact do you expect IDP to have on your organization in the next 1-3 years?

Category	Value
Don't know / hard to say	10
Uncertain	5
Minimal	3
Moderate	16
Significant	11
Transformational	3
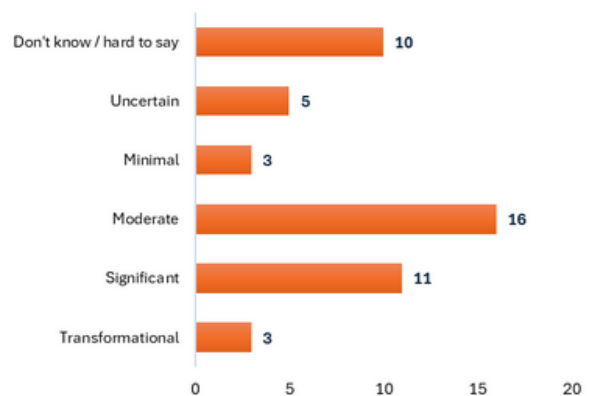
IDP Adoption Conclusion

The survey illustrates that while IDP is recognized for its potential to enhance document processing and related functions, its integration and impact vary widely among organizations. The cautious but growing interest suggests that while IDP has not yet become a transformative force in the industry, its evolving adoption could lead to more significant integration and impact in the coming years.

The overall data highlights a sector that is **still discovering** how best to leverage IDP's capabilities, with much progress yet to be made in realizing its full benefits.

05

Machine Learning (ML) Adoption
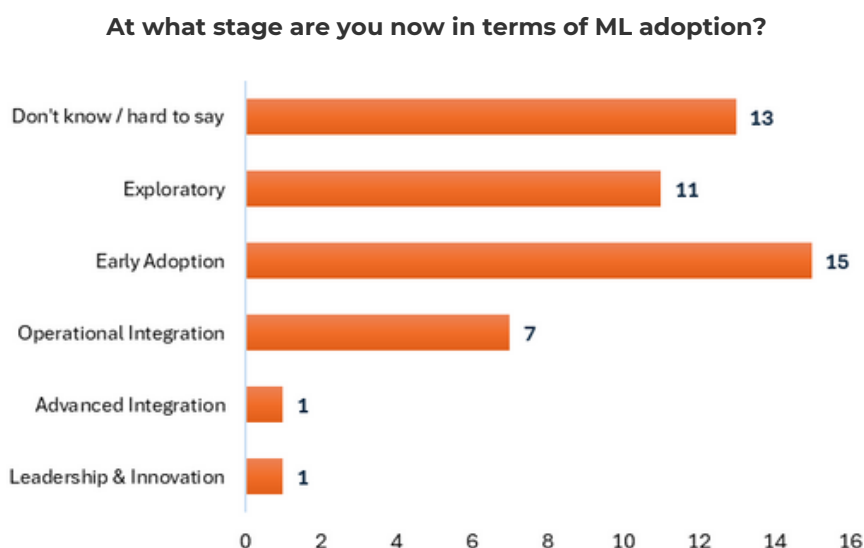
Office Samurai and ABSL

Machine Learning (ML) is a subset of artificial intelligence that focuses on the development of algorithms and models that enable computers to learn from and make predictions or decisions based on data. ML algorithms can analyze and recognize patterns in data, make predictions, classify information, and optimize processes, making it a fundamental tool for various AI applications.

Current Stages of ML Adoption

Given the maturity of Machine Learning (ML) as a technology, the current stages of ML adoption across various organizations reveal a diverse landscape with many still in the early stages. Despite ML's established potential, only one organization is at the leading edge, continuously innovating and setting benchmarks for ML-powered operations. Another organization has achieved advanced integration, where ML is well-incorporated across multiple functions, driving significant value and transformations in various departments. Seven organizations are at the operational integration stage, utilizing ML in several processes and experiencing tangible benefits from its application.

Interestingly, a substantial number of organizations, fifteen, are in the early adoption phase, having initiated pilot projects or proofs of concept without yet integrating ML into mainstream operations. Eleven organizations remain in the exploratory phase, learning about ML's potential and implications for their industry without any active projects. Additionally, thirteen respondents were uncertain about their current stage of ML adoption. This spread of adoption levels highlights a significant gap between the potential of ML technology and its actual implementation in industry practices.

At what stage are you now in terms of ML adoption?

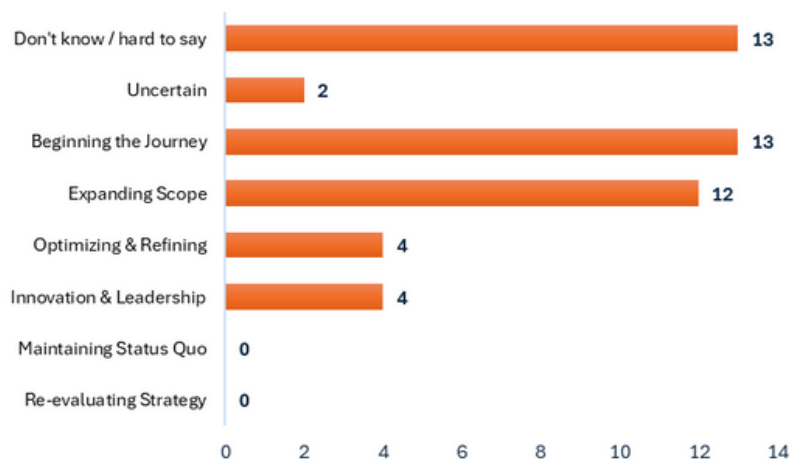| Stage	Value
Don't know / hard to say	13
Exploratory	11
Early Adoption	15
Operational Integration	7
Advanced Integration	1
Leadership & Innovation	1

Future Plans for ML Adoption

Despite the varied stages of current ML adoption, the future plans indicate a strong desire among organizations to further expand and refine their use of this technology. Four organizations plan to push the boundaries of current ML applications, aiming for breakthrough innovations and setting industry benchmarks. Another four organizations are focused on optimizing and refining their existing ML solutions. Twelve organizations intend to scale their existing ML initiatives, integrating them into more operational areas.

Thirteen organizations are at the starting blocks, planning to explore ML through pilot projects or proofs of concept, reflecting ongoing interest and the perceived potential of ML within their operational frameworks. However, two organizations remain uncertain about the direction of their ML initiatives over the next 1-3 years. Additionally, thirteen respondents were unsure of their future plans. This uncertainty, coupled with the diverse approaches to ML adoption, highlights both the challenges and opportunities that lie ahead as organizations strive to leverage ML technology more effectively.

What best describes your company's ML adoption plans for the next 1-3 years?

Category	Value
Don't know / hard to say	13
Uncertain	2
Beginning the Journey	13
Expanding Scope	12
Optimizing & Refining	4
Innovation & Leadership	4
Maintaining Status Quo	0
Re-evaluating Strategy	0

Impact Expectations of ML Adoption

In the landscape of ML adoption, the anticipated impact of the technology paints a picture of high expectations within the SSC/BPO sector. Ten organizations believe ML will be transformational, significantly redefining core operations and altering business models. The largest group, consisting of thirteen organizations, expects significant improvements and efficiencies across several departments, though they do not foresee changes to the core business model. Seven organizations anticipate moderate benefits, with noticeable improvements in specific areas but not across the entire organization.

Interestingly, only one organization predicts minimal influence from ML, affecting just a few isolated tasks or processes, and four respondents remain uncertain about the impact ML will have on their operations.

Additionally, thirteen respondents were unsure of the expected impact. This small number of minimal and uncertain expectations highlights how ML has become an accepted part of operational strategy in the sector, with most organizations recognizing its value and integrating it to some degree. The data reflects a maturity in the adoption of ML, where its benefits are recognized but seen as part of a broader technological toolkit rather than the sole driver of future innovation.

How significant of an impact do you expect ML to have on your organization in the next 1-3 years?

ML Adoption Conclusion

The survey results on Machine Learning (ML) adoption highlight significant progress within the SSC/BPO sector. While the current stages of ML adoption vary, with only a few organizations at the cutting edge, a substantial number are in early or operational integration stages, exploring and integrating ML into their operations. **The future plans for ML are optimistic, with many organizations aiming to scale their initiatives, optimize existing solutions, and push for innovation.** The anticipated impact of ML reflects its growing acceptance as a vital enhancement tool, with moderate to significant improvements expected across multiple departments. This progress underscores the strides already made in leveraging ML technology, paving the way for continued advancements and a more efficient, streamlined future in business operations.

06

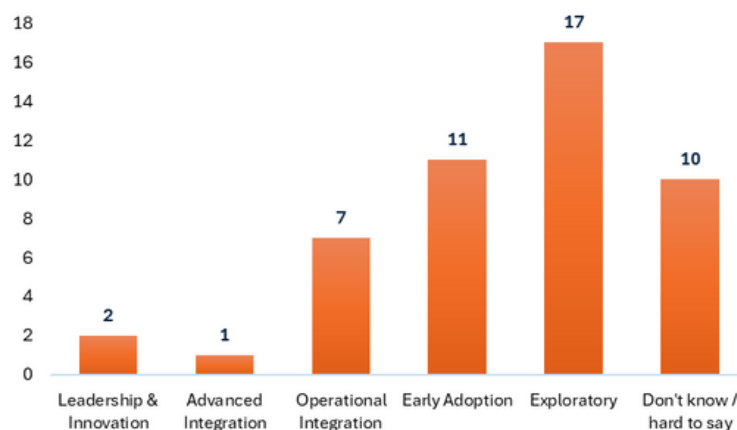## AI Conversational Platforms (AICP) Adoption

AI Conversational Platforms are tools or frameworks that enable the development and deployment of chatbots, virtual assistants, and natural language processing (NLP) applications. These platforms use machine learning and NLP techniques to understand and respond to human language, making them valuable for customer support, automated messaging, and other conversational AI solutions.

Current Stages of AICP Adoption

Given the maturity of AI Conversational Platforms as a technology, the current stages of adoption across various organizations show a diverse landscape with many still in the early stages. Despite AI Conversational Platforms' established potential, only two organizations are at the leading edge, continuously innovating and setting benchmarks for AI-powered operations. One organization has achieved advanced integration, where AI Conversational Platforms are well-incorporated across multiple functions, driving significant value and transformations in various departments. Seven organizations are at the operational integration stage, utilizing AI Conversational Platforms in several processes and experiencing tangible benefits from its application.

Interestingly, a substantial number of organizations, eleven, are in the early adoption phase, having initiated pilot projects or proofs of concept without yet integrating AI Conversational Platforms into mainstream operations. Seventeen organizations remain in the exploratory phase, learning about AI Conversational Platforms' potential and implications for their industry without any active projects. Additionally, ten respondents were uncertain about their current stage of AI Conversational Platforms adoption. This spread of adoption levels highlights a significant gap between the potential of AI technology and its actual implementation in industry practices.

At what stage are you now in terms of AICP adoption?
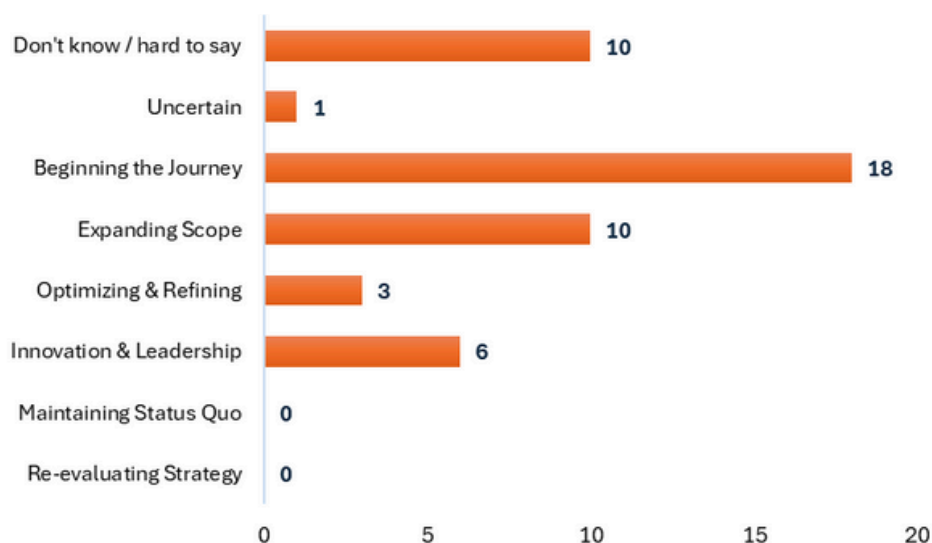
Future Plans for AICP Adoption

Despite the varied stages of current AI Conversational Platforms adoption, the future plans indicate a strong desire among organizations to further expand and refine their use of this technology. Six organizations plan to push the boundaries of current AI Conversational Platforms applications, aiming for breakthrough innovations and setting industry benchmarks. Another three organizations are focused on optimizing and refining their existing AI solutions. Ten organizations intend to scale their existing AI Conversational Platforms initiatives, integrating them into more operational areas.

Eighteen organizations are at the starting blocks, planning to explore AI Conversational Platforms through pilot projects or proofs of concept, reflecting ongoing interest and the perceived potential of AI within their operational frameworks. However, one organization remains uncertain about the direction of their AI initiatives over the next 1–3 years.

Additionally, ten respondents were unsure of their future plans. This uncertainty, coupled with the diverse approaches to AI adoption, highlights both the challenges and opportunities that lie ahead as organizations strive to leverage AI technology more effectively.

What best describes your company's AICP adoption plans for the next 1-3 years?

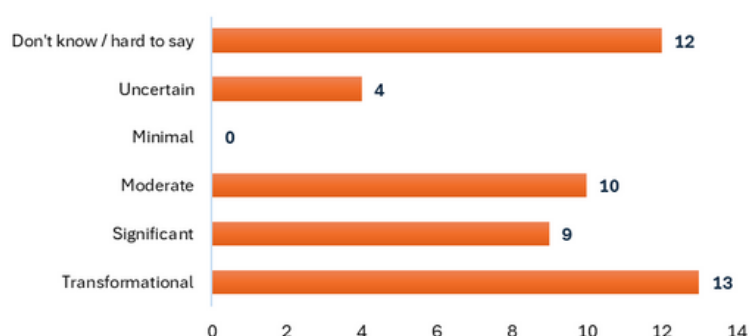| Category	Value
Don't know / hard to say	10
Uncertain	1
Beginning the Journey	18
Expanding Scope	10
Optimizing & Refining	3
Innovation & Leadership	6
Maintaining Status Quo	0
Re-evaluating Strategy	0

Impact Expectations of AICP Adoption

In the landscape of AI Conversational Platforms adoption, the anticipated impact of the technology paints a picture of high expectations within the SSC/BPO sector. Thirteen organizations believe AI Conversational Platforms will be transformational, significantly redefining core operations and altering business models. The largest group, consisting of nine organizations, expects significant improvements and efficiencies across several departments, though they do not foresee changes to the core business model. Ten organizations anticipate moderate benefits, with noticeable improvements in specific areas but not across the entire organization.

Interestingly, no organization predicts minimal influence from AI Conversational Platforms, affecting just a few isolated tasks or processes, and four respondents remain uncertain about the impact AI Conversational Platforms will have on their operations. Additionally, twelve respondents were unsure of the expected impact. This small number of minimal and uncertain expectations highlights how AI Conversational Platforms have become an accepted part of operational strategy in the sector, with most organizations recognizing its value and integrating it to some degree. The data reflects a maturity in the adoption of AI Conversational Platforms, where its benefits are recognized but seen as part of a broader technological toolkit rather than the sole driver of future innovation.

How significant of an impact do you expect AICP to have on your organization in the next 1-3 years?

Category	Value
Don't know / hard to say	12
Uncertain	4
Minimal	0
Moderate	10
Significant	9
Transformational	13

AICP Adoption Conclusion

The survey results on AI Conversational Platforms adoption highlight significant progress within the SSC/BPO sector. While the current stages of AICP adoption vary, with only a few organizations at the cutting edge, a substantial number are in early or operational integration stages, exploring and integrating AICP into their operations. The future plans for AICP are optimistic, with many organizations aiming to scale their initiatives, optimize existing solutions, and push for innovation.

The anticipated impact of AI Conversational Platforms reflects their growing acceptance as a vital enhancement tool, with moderate to significant improvements expected across multiple departments. This progress underscores the strides already made in leveraging AICP technology, paving the way for continued advancements and a more efficient, streamlined future in business operations.

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Generative AI (GenAI) Adoption

Office Samurai and ABSL

Generative AI, powered by Large Language Models (LLMs) refers to AI systems and models capable of generating new content, such as text, images, videos, or music, that is often indistinguishable from content created by humans. These LLMs, such as GPT (Generative Pre-trained Transformer) models, are among the most advanced examples of generative AI. They are trained on vast amounts of data and can be used for various creative and practical applications, including content generation, language translation, and more.

Large Language Models like GPT have revolutionized the field of natural language processing and understanding. They can comprehend and generate human-like text with remarkable accuracy, making them valuable tools for a wide range of industries, including business services (SSC/GBS). Assessing your organization's AI maturity level can help determine how effectively you can leverage these powerful generative AI capabilities to enhance your business processes and services.
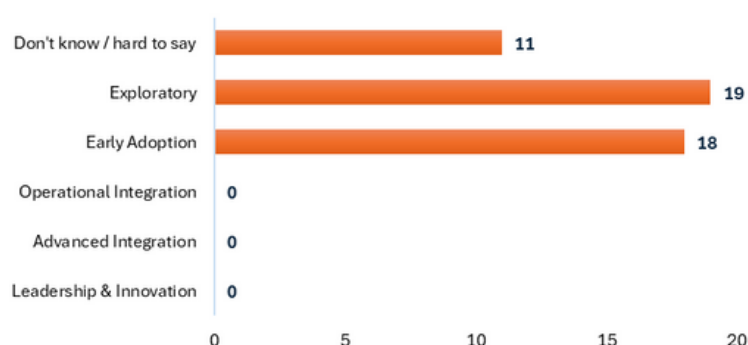
Current Stages of Generative AI Adoption

Generative AI (GenAI) is a very fresh technology, and as such, low adoption levels are to be expected at this early stage. The current stages of GenAI adoption across various organizations clearly reflect this nascent phase. Unsurprisingly, no organizations report being at the forefront or having advanced integration of GenAI, nor have any reached the operational integration stage where GenAI is part of several processes and yielding tangible benefits.

As anticipated, eighteen organizations are in the early adoption phase, having initiated pilot projects or proofs of concept without yet integrating GenAI into mainstream operations.

A larger group, consisting of nineteen organizations, remains in the exploratory phase, learning about GenAI's potential and implications for their industry without any active projects. Additionally, eleven respondents were uncertain about their current stage of GenAI adoption. This distribution underscores the expected cautious approach towards adopting such a groundbreaking – but not yet fully tested – technology.

At what stage are you now in terms of GenAI adoption?

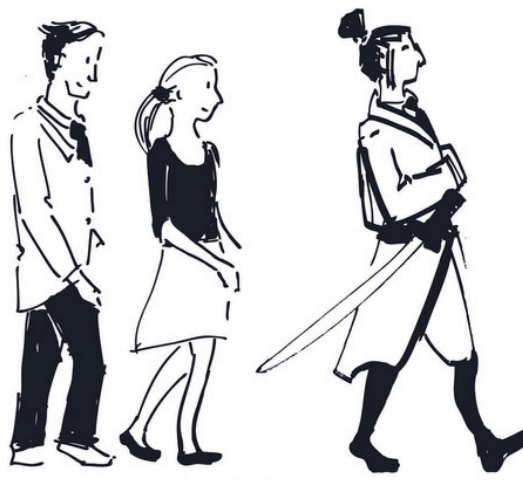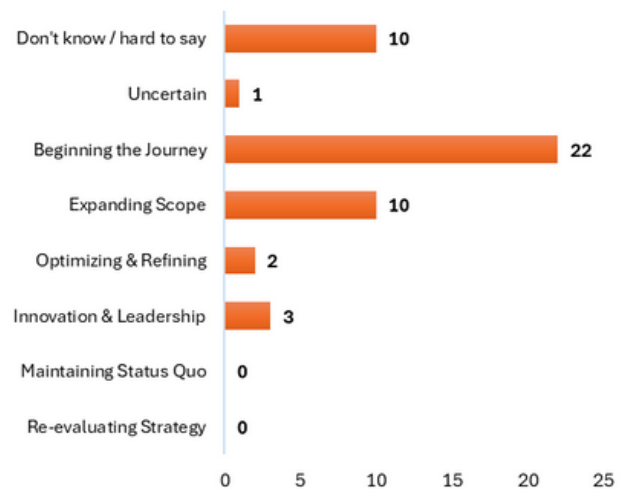| Stage	Value
Don't know / hard to say	11
Exploratory	19
Early Adoption	18
Operational Integration	0
Advanced Integration	0
Leadership & Innovation	0

Future Plans for Generative AI Adoption

Despite the early stages of current GenAI adoption, the future plans indicate a strong desire among organizations to further explore and refine their use of this technology. Three organizations plan to push the boundaries of current GenAI applications, aiming for breakthrough innovations and setting industry benchmarks. Another two organizations are focused on optimizing and refining their existing GenAI solutions. Ten organizations intend to scale their existing GenAI initiatives, integrating them into more operational areas.

A significant number, twenty-two organizations, are at the starting blocks, planning to explore GenAI through pilot projects or proofs of concept, reflecting ongoing interest and the perceived potential of GenAI within their operational frameworks. However, one organization remains uncertain about the direction of their GenAI initiatives over the next 1-3 years.

What best describes your company's GenAI adoption plans for the next 1-3 years?

Category	Value
Don't know / hard to say	10
Uncertain	1
Beginning the Journey	22
Expanding Scope	10
Optimizing & Refining	2
Innovation & Leadership	3
Maintaining Status Quo	0
Re-evaluating Strategy	0

Additionally, ten respondents were unsure of their future plans. This uncertainty, coupled with the diverse approaches to GenAI adoption, highlights both the challenges and opportunities that lie ahead as organizations strive to leverage GenAI technology more effectively.
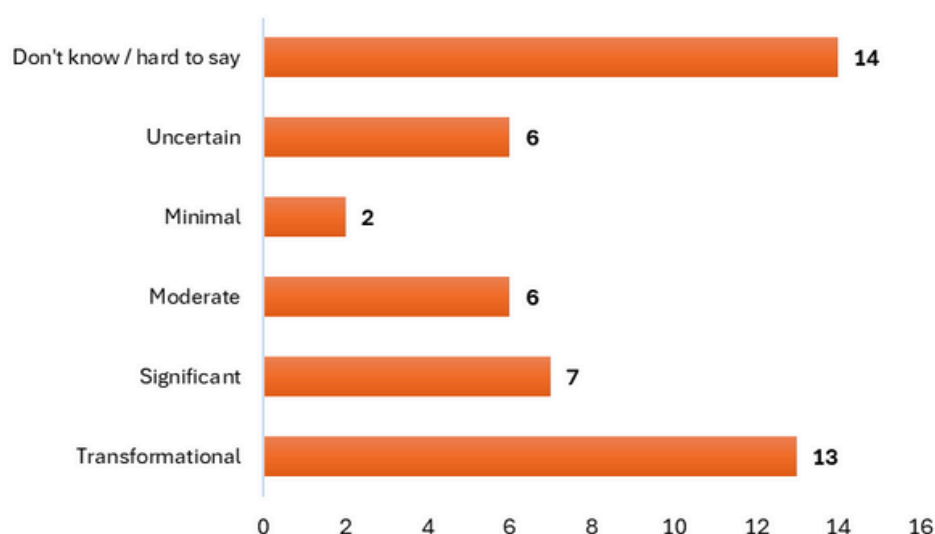
Impact Expectations of Generative AI Adoption

In the landscape of GenAI adoption, the anticipated impact of the technology paints a picture of high expectations within the SSC/BPO sector. Thirteen organizations believe GenAI will be transformational, significantly redefining core operations and altering business models. The next largest group, consisting of seven organizations, expects significant improvements and efficiencies across several departments, though they do not foresee changes to the core business model. Six organizations anticipate moderate benefits, with noticeable improvements in specific areas but not across the entire organization.

Interestingly, only two organizations predict minimal influence from GenAI, affecting just a few isolated tasks or processes, and six respondents remain uncertain about the impact GenAI will have on their operations. Additionally, fourteen respondents were unsure of the expected impact. This small number of minimal and uncertain expectations highlights how GenAI has become an accepted part of operational strategy in the sector, with most organizations recognizing its value and integrating it to some degree. The data reflects a maturity in the adoption of GenAI, where its benefits are recognized but seen as part of a broader technological toolkit rather than the sole driver of future innovation.

**How significant of an impact do you expect GenAI to have on your organization in the next 1-3 years?**

Category	Value
Don't know / hard to say	14
Uncertain	6
Minimal	2
Moderate	6
Significant	7
Transformational	13

Utilization of Large Language Models (LLMs)

As part of the broader adoption of Generative AI, text Large Language Models (LLMs) like ChatGPT and Google Bard are being utilized in various innovative ways within SSCs and GBSs. These models offer significant capabilities in natural language processing, enabling a wide range of applications that enhance efficiency, accuracy, and overall business performance. The survey revealed the following ways in which companies are currently leveraging LLMs.

In which of the following ways does your company utilize Large Language Models?
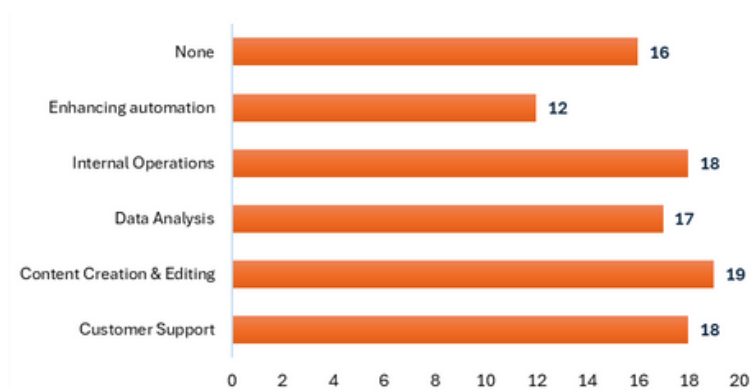
Customer Support	Eighteen organizations reported using LLMs to automate responses, deploy chatbots, and categorize support tickets. By integrating LLMs into customer support functions, these companies aim to improve response times, provide more consistent service, and reduce the workload on human agents.
Content Creation & Editing	Nineteen organizations are utilizing LLMs for drafting, proofreading, and augmenting content for marketing, blogs, and other publications. LLMs help in generating high-quality text, ensuring consistency, and speeding up the content creation process, which is particularly beneficial for marketing and communication teams.
Data Analysis	Seventeen organizations use LLMs to extract insights from textual data, perform sentiment analysis, and conduct other natural language processing (NLP) tasks. This application enables companies to derive meaningful insights from large volumes of unstructured data, enhancing decision-making and strategy formulation.
Internal Operations	LLMs are also being used to streamline internal communications, automate routine written tasks, and process documents. Eighteen organizations reported leveraging LLMs for these purposes, which helps in reducing administrative burdens and improving operational efficiency.
Internal Operations	LLMs are also being used to streamline internal communications, automate routine written tasks, and process documents. Eighteen organizations reported leveraging LLMs for these purposes, which helps in reducing administrative burdens and improving operational efficiency.
Enhancing Automation	Twelve organizations are integrating LLMs with Robotic Process Automation (RPA) and other automation tools to create more intelligent and context-aware automation processes. This integration enhances the capabilities of automation systems, making them more adaptable and effective in handling complex tasks.
Non-Utilization	Interestingly, sixteen organizations indicated that they do not currently use LLMs in any capacity. This suggests a segment of the industry is either in the early stages of exploring these technologies or has not yet identified suitable use cases for their application.

Analysis and Insights (LLMs)

The diverse applications of LLMs demonstrate their versatility and the significant value they can bring to various business functions. By automating and enhancing processes across customer support, content creation, data analysis, and internal operations, LLMs help organizations improve efficiency, accuracy, and service quality.

We are pleasantly surprised by the number of companies already declaring that they use text LLMs, considering that this is such a young technology. This early adoption indicates a strong interest and confidence in the capabilities of LLMs, reflecting a forward-thinking approach among these organizations. Their willingness to experiment and integrate cutting-edge AI tools suggests a readiness to innovate and adapt to new technological advancements.

However, the fact that a notable number of organizations are not yet utilizing LLMs indicates there are still barriers to adoption. These may include a lack of technical expertise, concerns about data privacy and security, or the need for more concrete use cases to justify investment.

Generative AI Adoption Conclusion

The survey results on Generative AI (GenAI) adoption highlight significant progress within the SSC/BPO sector, albeit in its early stages. While the current stages of GenAI adoption show no organizations at the cutting edge, a substantial number are in early or exploratory stages, investigating and initiating pilot projects. **The future plans for GenAI are optimistic, with many organizations aiming to explore, scale, and optimize their initiatives.** The anticipated impact of GenAI reflects its growing acceptance as a vital enhancement tool, with moderate to transformational improvements expected across multiple departments. This progress underscores the strides already made in leveraging GenAI technology, paving the way for continued advancements and a more innovative future in business operations.

Navigating the AI Revolution
Interview with Agnieszka Ziętek

AGNIESZKA ZIĘTEK

AI/ML Competency Center Manager

Andrzej Kinastowski (AK): Thank you for joining us today, Agnieszka. Can you start by introducing yourself and your role at Rockwell Automation?

Agnieszka Ziętek (AZ): Of course. My name is Agnieszka Ziętek, and I am the manager of the AI and ML Competency Centre at Rockwell Automation. I represent the finance department and have been with Rockwell for about four years. Before taking on my current role, I managed the smart automation portfolio delivery, which included various technologies like RPA, IDP, low-code/no-code platforms, VBA, Python, process mining, and AI solutions.

AK: That's an impressive range of technologies. Could you share some insights from your experience adopting automation technologies?

AZ: Certainly. Over the past nine years, we have witnessed significant advancements in the industry. Initially, integrating RPA technologies was a big step, and we had to educate management and employees about the potential of software robots compared to traditional VBA macros. One crucial strategy was achieving early quick wins, which helped demonstrate the value of these technologies to our stakeholders.
At the time generational differences played a significant role.

Gen Z, who grew up with technology, and millennials, who witnessed technological progress during their childhood, adapted more easily. However, Gen X and older generations faced more challenges, requiring a substantial mindset change to navigate businesses in a paperless, tech-driven environment. This generational gap influenced how we approached change management and training.

AK: What were some of the key transformations you observed in your department?

AZ: One major transformation was the shift from medium and large-scale VBA development to Microsoft Power Platform solutions. This strategic move allowed us to develop power applications, automation flows, and dashboards, leading to significant productivity gains and ROI improvements. We were able to redesign processes end to end, securing input quality through dedicated forms, and then processing with "virtual employees", presenting results in dashboards and other notification systems. Additionally, we introduced citizen developer programs to upskill employees, enabling them to automate processes within their departments, which accelerated our transformation pace, and gave employees alternative development paths. This is one of the ways we build our improvement culture.

AK: That seems like one of the cornerstones for a big scale automation program. What other aspects need to be taken care of, for a company to have a successful AI implementation?

AZ: Data quality is paramount. We learned that without high-quality data, implementing complex AI solutions becomes challenging and costly. Therefore, assessing data health, structure, and security is essential. Gartner's recommendation to manage data as an asset is spot on. Right now data is probably worth more than gold, and good data quality provides a competitive advantage and forms the foundation for successful AI projects. That's actually one aspect I was missing in the survey - it would have been interesting to ask organizations about their maturity in terms of data quality.

Our first machine learning project at Rockwell was initiated over two years ago, aimed at predicting the risk of delayed payments. This project predated the current AI hype and highlighted the value of knowledge that often isn't captured in any system but resides in our employees' experience. We realized the importance of data storytelling in this context. Before developing more advanced solutions, it was crucial to understand the decision criteria reflected in the data. During this project, we encountered discrepancies because many verbal agreements and discussions were not officially recorded, skewing our data results. To address this, we implemented recommendation systems to establish a baseline for further decisions, ensuring our solutions were grounded in real business needs. This experience underscored that successful AI projects depend on translating business problems into actionable metrics, a lesson that has shaped our subsequent AI endeavors.

AK: You are strongly focused on data, which makes all the sense in AI implementations. Could you elaborate on how we should approach data analysis in that context?

AZ: Certainly. When thinking about data and technology, I often draw inspiration from scenes in movies like Iron Man and Minority Report. Imagine Robert Downey Jr. manipulating multidimensional holograms, rotating them, picking out elements, and zooming in and out to uncover hidden details. This concept of interacting with data in a dynamic, multidimensional way is how we should approach data analysis and AI implementation. Instead of confining ourselves to traditional, two-dimensional tables and static charts, we need to embrace a more interactive and exploratory mindset. This shift is crucial, especially for Gen Z and future generations, who will naturally adapt to these advanced ways of working. By rethinking our processes and adjusting to the new technological landscape, we can unlock deeper insights and more powerful solutions, transforming the way we operate and make decisions.

AK: What are your thoughts on the recent hype around generative AI and its impact on AI adoption?

AZ: The generative AI hype has undeniably accelerated AI adoption across various industries. However, this rapid adoption often seems driven more by a fear of missing out rather than a clear understanding of the technology's potential and requirements.

I've observed that some companies dive into AI implementation without having a well-defined use case or the necessary readiness. It's like expecting a Tour de France contestant to win without a bicycle or even knowing where the race will take place. While generative AI holds immense promise, it's crucial for companies to evaluate their actual needs, infrastructure, and readiness before investing heavily. Without this foundational assessment, the risk of project failures and unmet expectations increases. Moreover, aligning AI capabilities with actual business needs is crucial, as misalignment can lead to inefficiencies and unmet expectations. Don't hammer nails with a smartphone, choose the right technology for solving the right problem.

So, I guess my take is, while generative AI can revolutionize business processes, its implementation should be approached strategically and thoughtfully to ensure meaningful and sustainable outcomes.

AK: And how do you see the future of AI in business processes?

AZ: The future of AI in business processes is incredibly promising. However, it requires a shift in mindset from two-dimensional to multidimensional thinking. Technologies like generative AI have accelerated AI adoption, but companies must carefully assess their readiness and choose appropriate use cases to avoid premature investments. Ultimately, AI should transform processes and how we work, not just automate existing workflows.

AK: What advice would you give to companies looking to adopt AI technologies?

AZ: I suggest starting with a thorough assessment of data quality and organizational readiness. Focus on finding good use cases that demonstrate AI's potential, achieve small wins, learn from mistakes, and adapt continuously. It's important to be patient and persistent, as AI adoption is a journey that requires careful planning and execution.

AK: Thank you, Agnieszka, for sharing your insights. Your experience and advice will certainly help many organizations in their AI adoption journey.

AZ: Thank you for having me. It's been a pleasure to share my thoughts and experiences.

08

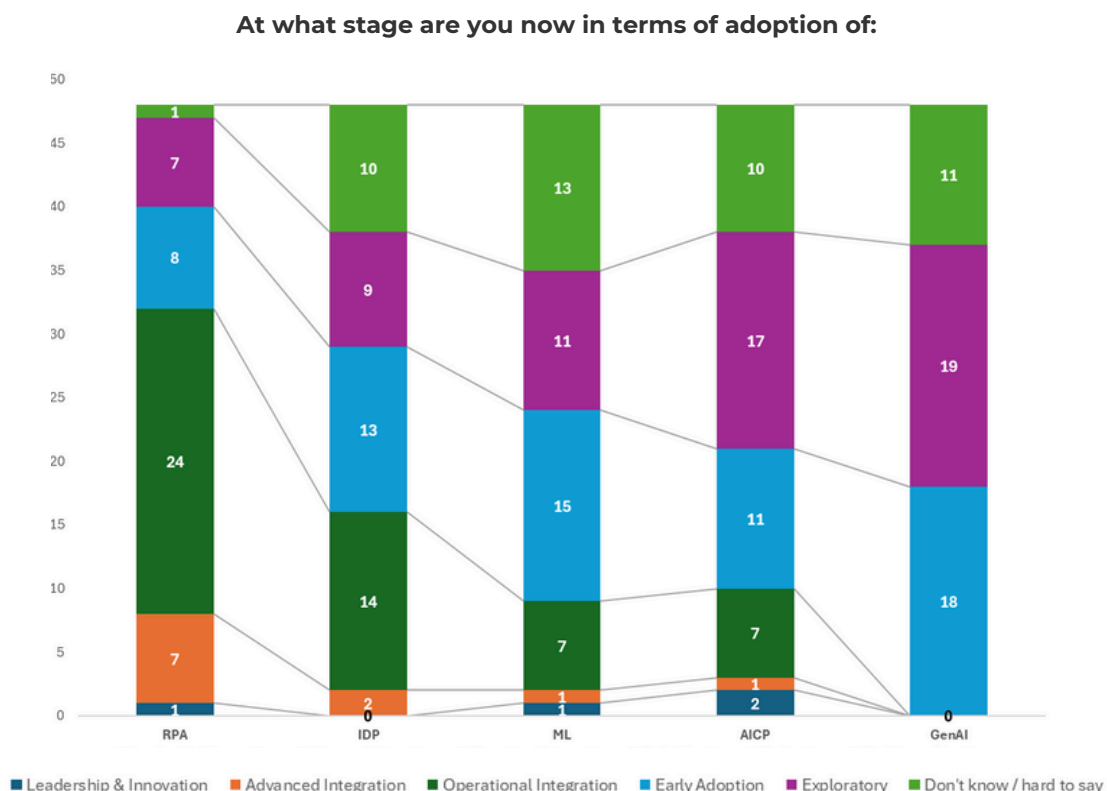# Comparison of data across technologies

Current adoption levels

The adoption stages of various technologies within SSC/BPO companies reveal significant differences in their maturity and integration levels. Robotic Process Automation (RPA) stands out as the most mature technology, with lots of organizations who have operationally integrated RPA into their processes, reflecting its established role in enhancing efficiency and productivity. This widespread adoption of RPA underscores its perceived reliability and value in automating repetitive tasks.

In contrast, Intelligent Document Processing (IDP) and Machine Learning (ML) are less advanced in their adoption stages. While IDP shows some progress with two organizations at the advanced integration stage and 14 operationally integrated, a significant number remain in early adoption or exploratory phases. ML is similarly positioned, with only one organization each in leadership and advanced integration stages, and seven having achieved operational integration. The cautious approach to ML and IDP may stem from their complexity and the need for substantial data management and analysis capabilities, which require more time and resources to fully implement.

Generative AI (GenAI) and AI Conversational Platforms (AICP) are the newest and least adopted technologies in this sector. No organizations report advanced or operational integration of GenAI, and only two have reached leadership and innovation in AICP. The majority of organizations for both technologies are still in exploratory or early adoption phases, indicating that while there is considerable interest, these technologies are still in the experimental stages. The nascent nature of GenAI, in particular, reflects its emerging status, with organizations still assessing its potential and implications. This comparison highlights a technology adoption curve, with RPA being well-established, IDP and ML in intermediate stages, and GenAI and AICP at the beginning of their journey, showing the evolving landscape of technological integration in the SSC/BPO sector.

At what stage are you now in terms of adoption of:

■ Leadership & Innovation ■ Advanced Integration ■ Operational Integration ■ Early Adoption ■ Exploratory ■ Don't know / hard to say

Adoption plans

The adoption plans for the next 1-3 years among SSC/BPO companies reveal varying levels of commitment and strategic direction for different technologies. Robotic Process Automation (RPA) appears to be in a mature phase, with a significant number of organizations looking to expand its scope and optimize and refine existing solutions. However, a notable segment is also re-evaluating their strategies or maintaining the status quo, indicating a period of reflection and consolidation for RPA. This suggests that while RPA is well-entrenched, companies are seeking to fine-tune their applications or reconsider their overall approach to ensure maximum efficiency and return on investment.

In contrast, Intelligent Document Processing (IDP) and Machine Learning (ML) exhibit a different trend. Both technologies have a considerable number of organizations planning to expand their scope, and many companies are just beginning their journey. This indicates a phase of growth and exploration, as businesses recognize the potential benefits of these technologies but are still in the process of widespread implementation. The relatively low numbers in innovation and leadership for IDP compared to ML suggest that ML might be seen as a more strategic investment in the near future, potentially due to its broader applications and transformative potential.

AI Conversational Platforms (AICP) and Generative AI (GenAI), being less mature technologies, show the highest levels of initial exploration and pilot projects. AICP has a significant portion of organizations planning to begin their journey or expand their scope, with a noteworthy number aiming for innovation and leadership. This reflects a strong interest in leveraging AI for interactive and customer-facing applications. Similarly, GenAI has the most companies at the beginning of their journey and plans to expand its scope, although fewer organizations are ready to push for innovation and leadership. This cautious yet expansive approach highlights the emerging nature of GenAI and AICP, with companies keen to explore their potential while still navigating the complexities of integration and impact.

What best describes your company's adoption plans for the next 1-3 years of:
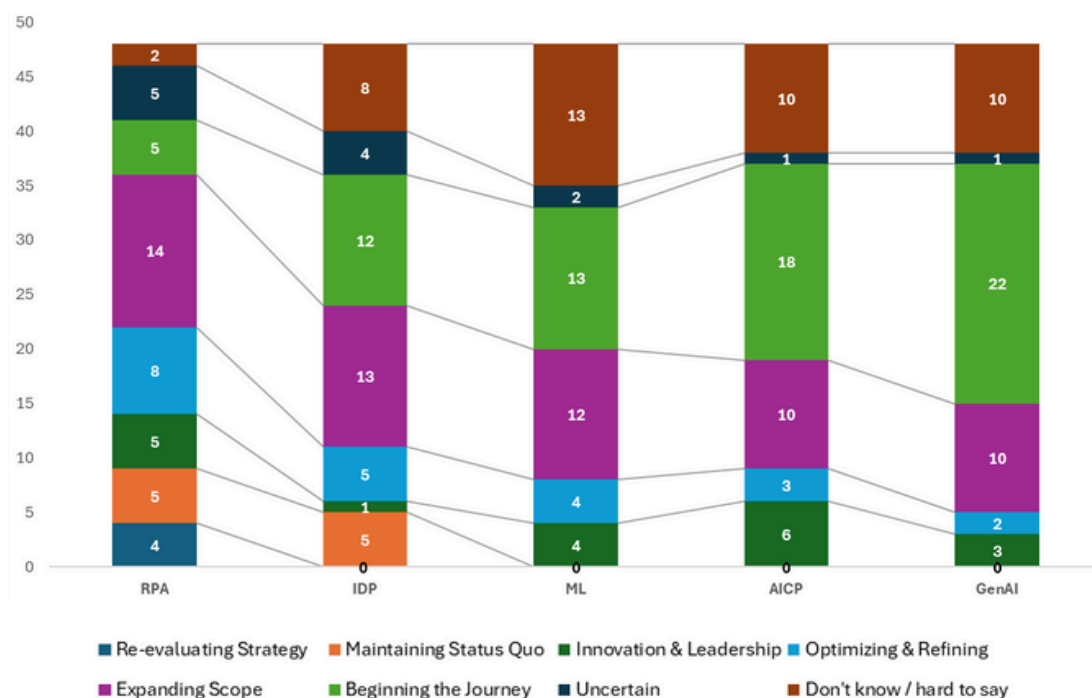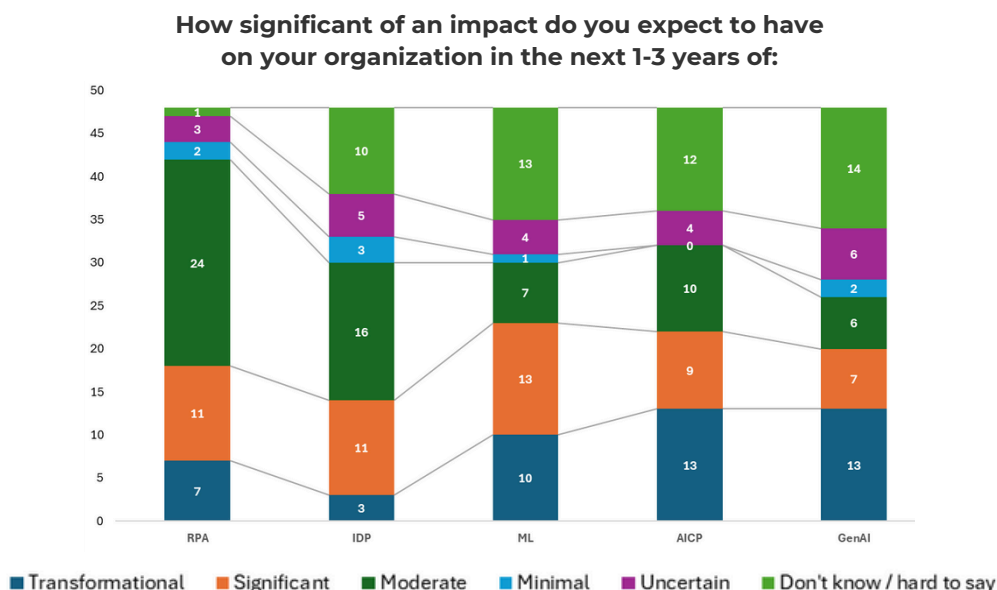
Expected impact

The expected impact of various technologies on SSC/BPO organizations in the next 1-3 years reveals distinct perceptions about their transformative potential. A more mature and widely adopted Robotic Process Automation (RPA) is anticipated to have a substantial but generally moderate future effect, with lots of organizations expecting noticeable improvements in specific areas, forecasting significant benefits across several departments. Only some organizations foresee a transformational impact, indicating that while **RPA is highly valued for enhancing efficiency, it is – at this stage - largely seen as an incremental improvement tool rather than a game-changer.**

Intelligent Document Processing (IDP) and Machine Learning (ML) show more varied expectations. For IDP, most organizations anticipate moderate to significant benefits with a smaller group expecting transformational changes. This suggests that while IDP is appreciated for its potential to streamline document-centric processes, its perceived impact is somewhat restrained compared to more established technologies like RPA. On the other hand, ML has a higher proportion of organizations expecting transformational impact, alongside significant improvements. This underscores ML's broader and more versatile applications, with many companies viewing it as a critical driver of future innovation and efficiency across various functions.

AI Conversational Platforms (AICP) and Generative AI (GenAI) are seen as the most transformative among the surveyed technologies. Both have a significant number of organizations anticipating a transformational impact. AICP also has a considerable group expecting significant improvements and moderate benefits, reflecting its growing role in enhancing customer interactions and operational efficiency. GenAI, while expected to be transformational by a significant number of organizations, also faces a fair amount of uncertainty and moderate expectations. This indicates that while there is high optimism about GenAI's potential, its relatively recent emergence leads to cautious optimism and ongoing assessment of its capabilities and impact.

Overall, these insights highlight a spectrum of expectations, with RPA being seen as a solid but incremental improvement tool, IDP and ML as promising technologies with increasing strategic importance, and AICP and GenAI as potentially revolutionary forces poised to reshape core business operations significantly.

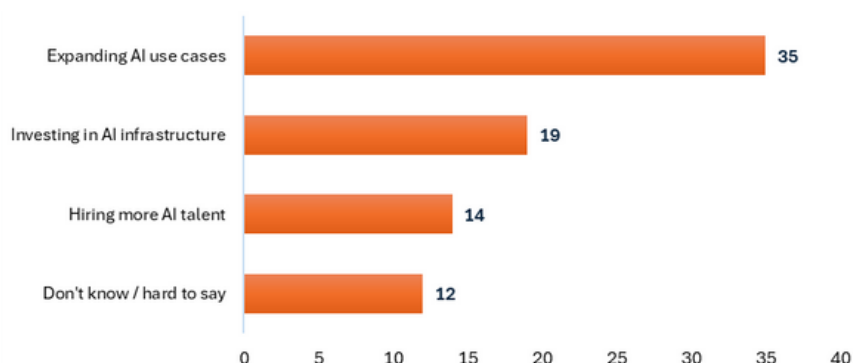**How significant of an impact do you expect to have on your organization in the next 1-3 years of:**

Legend: Transformational, Significant, Moderate, Minimal, Uncertain, Don't know / hard to say

09

Future Outlook

Office Samurai and ABSL

Primary goals regarding AI in the next 1-3 years

The primary goals of SSC/BPO organizations regarding AI for the next 1-3 years, as revealed by the survey, indicate a strong focus on expanding the application of AI within their operations. The results from the multiple-choice question highlight the following priorities:

What are your primary goals regarding AI in the next 1-3 years?

Category	Value
Expanding AI use cases	35
Investing in AI infrastructure	19
Hiring more AI talent	14
Don't know / hard to say	12

Expanding AI Use Cases: The most common goal, cited by 35 organizations, is to expand the use of AI across more functions and processes. This goal underscores a widespread recognition of AI's potential to drive efficiency, innovation, and competitive advantage. Organizations are keen to explore new AI applications and leverage the technology to automate and enhance a broader range of activities.

Investing in AI Infrastructure: Nineteen organizations identified investing in AI infrastructure as one of primary goals. This reflects the necessity of building robust technical foundations to support AI initiatives. Investing in infrastructure includes upgrading hardware, implementing advanced software platforms, and ensuring data readiness, which are critical for the successful deployment and scaling of AI solutions. Additionally, this investment may indicate that companies prefer to have their own infrastructure to run GenAI applications, possibly due to concerns about data security and control when using cloud-based tools. This desire for on-premises infrastructure highlights the importance of maintaining control over sensitive data and AI models.

Hiring More AI Talent: Fourteen organizations aim to hire more AI talent, highlighting the importance of human expertise in maximizing AI's potential. Recruiting skilled professionals with expertise in AI and machine learning is essential for developing, managing, and optimizing AI systems. This goal indicates an understanding that the success of AI projects depends not only on technology but also on the availability of qualified personnel.

Uncertainty: Twelve organizations selected "Don't know / hard to say," indicating uncertainty or a lack of clear strategic direction regarding AI. This response suggests that some organizations are still in the process of evaluating their AI strategies or may be facing challenges in defining their AI-related goals.

These insights into the primary goals of SSC/BPO organizations reveal a sector actively seeking to expand and enhance its AI capabilities, **with a clear focus on broadening AI use cases**, investing in necessary infrastructure, and acquiring the talent needed to support these advancements.

Emerging AI technologies

The free text responses to the question "Are there any emerging AI technologies or trends that you are particularly excited about or planning to adopt?" reveal a diverse array of interests and priorities among SSC/BPO organizations. The answers highlight several key areas of excitement and planned adoption:

Large Language Models (LLMs)

Many respondents are enthusiastic about LLMs, with specific mentions of ChatGPT for summarizing research and translation models. The potential of LLMs to make roles more efficient, reduce errors, and enhance productivity is a recurring theme. Some organizations aim to implement LLMs where useful and safe, ensuring that the technology augments rather than replaces human employees.

Generative AI

There is significant interest in Generative AI applications across various functions. Respondents mentioned its use in operations, customer support, data analysis, and automation. Generative AI is seen as a transformative technology with the potential to drive innovation and efficiency.

Machine Learning (ML) and RPA

These established technologies continue to attract attention, with organizations planning to leverage ML for data analysis and RPA for automating repetitive tasks. The ongoing integration of these technologies reflects their critical role in enhancing operational efficiencies.

Edge AI

The deployment of AI models directly on edge devices, such as smartphones and IoT devices, without relying on centralized cloud servers, is an emerging trend. Edge AI offers advantages in terms of reduced latency, enhanced privacy, and real-time processing capabilities.

AI for Security and Cybersecurity

Security AI and AI-driven cybersecurity solutions are emerging trends that organizations are keen to explore. These technologies offer the promise of proactive threat detection and mitigation, crucial in an increasingly digital and interconnected world.

Voice Technologies

Applications such as voice-to-voice translations and voice technology for various uses, including customer support and internal communications, are gaining traction. These technologies can significantly improve communication efficiency and accessibility.

Proactive IT Issue Prevention

AI solutions that can predict and prevent IT issues before they occur are being explored to enhance system reliability and reduce downtime.

Sentiment Analysis and Emotion AI

The ability to analyze and interpret human emotions and sentiments using AI is seen as a valuable tool for improving customer service, marketing, and employee engagement strategies.

Generative Design and Low-Code/No-Code AI

Technologies that enable rapid prototyping and design using AI, along with platforms that allow users to create AI applications with minimal coding, are areas of growing interest. These tools democratize AI development and accelerate innovation.

Conversational AI and AI in Customer Support

The use of AI to improve customer support functions is a priority for many. This includes deploying chatbots and AI assistants to enhance customer interactions and provide more efficient service.

AI in Medical Advancements

The potential of AI to revolutionize healthcare through advancements in diagnostics, treatment planning, and personalized medicine is another area of excitement.

The responses also reflect a spectrum of readiness and engagement with emerging AI technologies. This diversity underscores the varied pace of AI adoption and the importance of continuous learning and adaptation in leveraging AI technologies effectively. A crucial insight from the survey is the importance of organizations learning from each other, drawing inspiration, and accessing solid data on good use cases. By sharing experiences, best practices, and successful implementations, SSC/BPO organizations can accelerate their AI adoption journey.

Collaborative platforms and industry forums can play a vital role in disseminating knowledge and fostering a community of practice where organizations can learn from the successes and challenges of their peers.

This collective learning approach can help mitigate risks, optimize resource allocation, and drive innovation more effectively, ultimately enhancing the overall AI maturity of the sector.

Are we ready?

The free text responses to the question "How would you rate your preparedness for future AI trends and developments?" reveal a broad spectrum of readiness among SSC/BPO organizations. The answers indicate varying levels of preparedness and highlight both the opportunities and challenges faced by organizations in adapting to future AI trends.

Early Stages
A significant number of respondents described their organizations as being in the early stages of AI integration. These organizations are just beginning to explore AI and are not yet ready to quickly adopt new trends. Comments like "early stages," "working on it," "very early stage of AI integration," and "not prepared to adopt quickly new trends" reflect this sentiment.

Low Preparedness
Many respondents rated their preparedness as low, indicating that much work remains to be done. Responses such as "low," "very low," "poor," "not well prepared yet," and "still much to be done" highlight the challenges and the need for substantial efforts to improve AI readiness.

Moderate Preparedness
Some organizations described their preparedness as moderate. These respondents indicated that while there is awareness and some level of integration, there are still limitations and areas for improvement. Phrases like "moderate," "6/10," "5/10," and "dedicated team but limited at that stage" illustrate this middle ground.

High Preparedness
A smaller group of respondents rated their preparedness as high, indicating a strong readiness to embrace future AI trends. Comments such as "high," "high awareness," "leading edge," and "good and ready" reflect a proactive approach and significant progress in AI adoption.

Mixed Readiness
Several respondents provided nuanced answers that reflected a mixed level of readiness within their organizations. For example, "high in some areas such as integration into company products but low for back office operational processes," "mentally - high, technically - low," and "adequate" indicate that preparedness can vary significantly depending on the specific area or aspect of AI integration.

Ongoing Efforts and Strategic Planning
Some organizations are actively working on improving their AI readiness, with dedicated efforts and strategic planning. Responses like "developing a dedicated AI Center of Excellence," "written into overall strategy for the organization," and "we are on the good way" show a commitment to enhancing AI capabilities and readiness over time.

The varied responses highlight the diverse stages of AI preparedness across SSC/BPO organizations. While some are at the forefront, ready to lead in AI adoption, many others are still in the early stages or have low preparedness, indicating a significant need for investment in infrastructure, talent, and strategic planning. To navigate the rapidly evolving landscape of AI effectively, organizations must continuously update their skills, stay informed about new trends, and actively participate in research communities and industry forums, like ABSL.

Who wrote the survey?

In our final question, "How much of this survey do you think has been written by ChatGPT?", the responses highlighted the role of AI in crafting the survey.

The majority of respondents (30) believed that most of the survey was written by ChatGPT, while another 9 believed that all of it was AI-generated. A smaller portion thought that only a bit (7) or none (2) of the survey was written by ChatGPT.

How much of this survey do you think has been written by ChatGPT?

- None
- A bit
- Most of it
- All of it
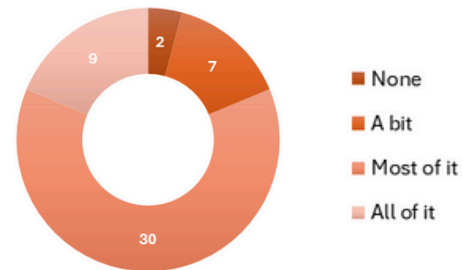
Reality of AI Collaboration

The actual process of creating this survey, as well as this report, involved a collaborative effort between human experts and ChatGPT. The survey questions and structure were designed by Office Samurai and ABSL, who determined the key areas of inquiry and the specific questions to ask. ChatGPT's role was to assist in articulating these questions clearly and cohesively, ensuring that the survey was well-written and comprehensive.

This collaboration extended to the creation of the report. While human analysts provided the insights and interpretations of the survey data, ChatGPT helped in drafting the text, making the language consistent and polished. This synergy between human expertise and AI capabilities ensured that the final product was both informative and professionally presented.

Mixed Authorship of Visuals

In addition to the text, the survey included various images, which also have different origins. Some of the images were generated by generative AI tools such as Midjourney and DALL-E, while others were created by a human artist. We presume that the report readers will be able to distinguish between the AI-generated images and those created by a human due to differences in style and execution. This mix of visual content further illustrates the collaborative potential of AI and human creativity in producing comprehensive and engaging materials.

Reflections on AI Use

The responses to this question reflect an interesting perception of AI's capabilities and its role in professional tasks. The fact that most respondents believed ChatGPT played a significant role underscores the effectiveness of AI in generating high-quality written content. It also highlights the increasing acceptance and integration of AI tools in business processes.

The collaboration between human experts and AI, exemplified in the creation of this survey and report, demonstrates the potential of AI to enhance productivity and quality. By leveraging AI tools like ChatGPT, organizations can streamline content creation, ensure consistency, and focus human efforts on strategic analysis and decision-making. This approach not only improves efficiency but also underscores the complementary relationship between human intelligence and artificial intelligence in driving business innovation and excellence.

Unveiling AI Adoption in the SSC/BPO Sector
Interview with Agnieszka Belowska-Gosławska

AGNIESZKA BELOWSKA-GOSŁAWSKA

Head of Compliance Office, formerly Head of Robotics Process Automation CoE

Nordea

VP Łódź Chapter ABSL

ABSL

Andrzej Kinastowski (AK): Agnieszka, thank you for agreeing to the interview, and for reading through the report. Let's dive right into it. Based on your insights, how do you perceive the current state of AI adoption in the SSC/BPO sector?

Agnieszka Belowska (AB): Hi, Andrzej. The AI adoption landscape is quite intriguing. From my perspective there's a noticeable gap between the perception and the reality of AI integration. I feel like many organizations believe they're further along in their AI journey than they actually are. This is often due to the high expectations set by industry conferences and discussions, where the rapid pace of technological advancement is frequently highlighted. However, in practice, the adoption tends to lag behind these projections.

AK: That's a good point, feels right. How do we bridge this gap then?

AB: One of the significant challenges is education. Data from the Łódzkie Voivodeship shows that 67% of lecturers in scientific disciplines are aged 65 and above. This trend is alarming because it raises concerns about who will educate the next generation in automation and AI. Additionally, the salary disparity between academia and the tech industry further exacerbates the issue, as many potential educators are drawn to more lucrative positions in the private sector. At the same time, we need to ensure that educational curricula are frequently revised to keep pace with industry demands, which isn't that easy with higher education. On top of that, the rapid technological advancements necessitate a workforce that is continuously learning and adapting. Lifelong learning and professional development should be a priority for both educational institutions and business organizations.

AK: There are other barriers organizations talk about, in the financial sector especially the financial and regulatory challenges.

AB: The financial sector indeed faces unique challenges due to stringent regulatory environments. Regulations around data security and privacy, such as GDPR, impose significant constraints on using large data models essential for AI. These hurdles slow down the pace of AI implementation as organizations navigate compliance while trying to leverage advanced technologies. A strategic approach that balances innovation with regulatory adherence is crucial.
Another significant barrier is the traditional separation between business and technology departments. Successful AI adoption requires a seamless integration where business leaders understand technology and tech experts grasp business needs. This interdisciplinary approach is vital for aligning AI initiatives with organizational goals and fostering a collaborative environment.

AK: How important is strategic investment and cost management in AI adoption?

AB: Extremely important. Nordea's experience is a great example. Initially, our automation costs were very high due to licensing, infrastructure, and consultancy fees. By meticulously analyzing and optimizing these costs, we reduced our expenditure significantly. Effective cost management, coupled with strategic investment, is essential for making automation technologies adoption viable and sustainable.

AK: Let's talk about scalability. What does it take to achieve scalability in AI adoption?

AB: Achieving scalability requires optimizing processes before automating them, automating inefficient processes only perpetuates existing issues. A central strategy of operation - like the one we adopted in Nordea - allows for better control over resource allocation and process improvements. Regular reviews and adjustments are crucial to ensure that automation efforts remain effective and cost-efficient.

AK: Drucker famously said that culture eats strategy for breakfast. What role does fostering a culture of innovation play in AI adoption?

AB: It's vital. Encouraging employees to experiment with new technologies can lead to the discovery of practical applications and new use cases for AI. Lots of organziations prevent their employees from using new technologies, like GenAI, while what they should be doing is to create an environment where employees feel empowered to explore and innovate. This cultural shift is essential for unlocking the full potential of AI, and for us taking the wheel in AI implementation.

AK: Taking the wheel sounds serious, could you expand on that?

AB: Certainly. The SSC/BPO sector, especially in regions like Poland and Europe, is at a crossroads. We must recognize that the sector cannot sustain itself in its current form indefinitely. Low-cost countries present significant competition, and the advent of automation threatens traditional job roles. This reality necessitates a strategic shift where SSC organizations take proactive measures to lead in AI adoption.
To do this, organizations need to view AI not just as a cost-saving tool but as a strategic asset that can drive innovation and create new business opportunities. The sector needs to develop and leverage advanced competencies in AI and automation to stay competitive. This involves investing in the latest technologies, fostering partnerships with educational institutions, and continuously upskilling the workforce.

Moreover, leadership within SSC organizations must embrace a forward-thinking mindset. Leaders should be willing to invest in AI despite short-term costs, with a clear vision of the long-term benefits. They need to create a culture that values continuous learning and adaptability, encouraging employees to explore and integrate new technologies into their workflows.

By taking these steps, SSC organizations can transform potential threats into opportunities, positioning themselves as leaders in the AI-driven future. This proactive approach will not only secure their relevance in the global market but also open up new avenues for growth and innovation.

AK: That's a compelling vision for the future. In conclusion, what key message would you like to convey to organizations contemplating their AI strategy?

AB: The key message is that business and technology can no longer be viewed as separate entities. They must be integrated seamlessly to drive progress. Additionally, the SSC/BPO sector must embrace AI and automation as the cornerstone of its future. This requires strategic investment, a commitment to continuous learning, and a culture that fosters innovation. By taking the wheel and driving their AI initiatives, SSC organizations can ensure their long-term success and remain competitive in an ever-evolving market.

AK: Spoken like a true leader. Thank you, Agnieszka, for sharing your insights. This has been an enlightening discussion.

AB: Thank you, Andrzej. It was a pleasure to discuss these topics. I hope insights in this report help organizations navigate their AI adoption journeys effectively.

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Recommendations and Best Practices

for Enhancing AI Maturity in SSCs and GBSs

As AI technologies continue to evolve and become integral to business operations, **enhancing AI maturity within Shared Service Centers (SSCs) and Global Business Services (GBSs)** is crucial. This chapter outlines key recommendations and best practices for organizations aiming to advance their AI capabilities and maximize the benefits of AI integration.

Develop a Clear AI Strategy

Define Vision and Goals: Establish a clear AI vision that aligns with your organization's overall strategic objectives. Define specific, measurable goals for AI initiatives, focusing on both short-term wins and long-term transformation.

Create a Roadmap: Develop a comprehensive AI roadmap that outlines key milestones, resources required, and timelines. This roadmap should include phases for exploration, pilot projects, scaling, and optimization.

Invest in AI Infrastructure

Build Robust Technical Foundations: Ensure you have the necessary technical infrastructure to support AI initiatives. This includes investing in high-performance computing resources, cloud services, and data management platforms.

On-Premises vs. Cloud: Evaluate the need for on-premises infrastructure versus cloud-based solutions. While cloud services offer scalability and flexibility, on-premises solutions may be preferable for data-sensitive applications such as Generative AI (GenAI).

Cultivate AI Talent and Skills

Hire AI Experts: Recruit professionals with expertise in AI, machine learning, data science, and related fields. Building a strong team of AI experts is essential for developing and managing AI projects effectively.

Upskill Existing Workforce: Provide training and development opportunities for your existing employees. Encourage continuous learning through workshops, online courses, and certifications to build internal AI capabilities.

Foster a Culture of Innovation

Encourage Experimentation: Promote a culture that values experimentation and innovation. Encourage teams to explore new AI technologies and approaches, even if they involve some risk.

Cross-Functional Collaboration: Facilitate collaboration between different departments and functions within the organization. Cross-functional teams can bring diverse perspectives and expertise to AI projects, enhancing their effectiveness and impact.

Focus on Data Quality and Management

Ensure Data Quality: High-quality data is critical for the success of AI initiatives. Implement robust data governance practices to ensure data accuracy, completeness, and consistency.

Leverage Data Lakes and Warehouses: Utilize data lakes and warehouses to store and manage large volumes of structured and unstructured data. These platforms enable efficient data processing and analysis, which are essential for AI applications.

Prioritize Ethical and Responsible AI

Develop Ethical Guidelines: Establish ethical guidelines for AI development and deployment. Address issues such as bias, transparency, accountability, and data privacy to ensure responsible AI use.

Monitor and Audit AI Systems: Regularly monitor and audit AI systems to ensure they operate as intended and adhere to ethical standards. Implement mechanisms for identifying and mitigating potential risks.

Scale AI Use Cases

Expand AI Applications: Identify and prioritize AI use cases with the highest potential impact. Expand successful pilot projects into full-scale implementations across the organization.

Integrate AI with Existing Systems: Ensure seamless integration of AI solutions with existing business systems and processes. This integration is key to maximizing the value and efficiency of AI applications.

Leverage Partnerships and Ecosystems

Collaborate with AI Vendors: Partner with AI technology vendors and service providers to access the latest tools, platforms, and expertise. These partnerships can accelerate AI adoption and innovation.

Engage in Industry Forums: Participate in industry forums, research communities, and conferences to stay informed about the latest AI trends and best practices. Networking with peers and experts can provide valuable insights and opportunities for collaboration.

Get Inspiration and Best Practices from Peers

Learn from Similar Organizations: It is crucial for SSCs and BPOs to learn from each other. By studying how peers are adopting and integrating AI technologies, organizations can gain valuable insights into best practices and avoid common pitfalls.

Benchmark and Adapt Use Cases: Look for use cases and success stories from other SSCs and BPOs. Benchmarking against peers can help identify which AI applications are most effective and adaptable to your own operations. This approach can provide a clear path forward, based on proven results in similar environments.

Measure and Communicate AI Impact

Define Key Metrics: Establish key performance indicators (KPIs) to measure the impact of AI initiatives. Focus on metrics such as cost savings, efficiency improvements, customer satisfaction, and revenue growth.

Communicate Success: Regularly communicate the outcomes and benefits of AI projects to stakeholders. Highlighting successes can build support for further AI investments and initiatives.

Enhancing AI maturity in SSCs and GBSs requires a strategic and multifaceted approach.

By developing a clear AI strategy, investing in infrastructure and talent, fostering a culture of innovation, prioritizing data quality, ensuring ethical AI use, scaling AI applications, leveraging partnerships, learning from peers, and measuring impact, organizations can effectively navigate the complexities of AI adoption.

These recommendations and best practices provide a roadmap for SSCs and GBSs to harness the transformative power of AI, driving efficiency, innovation, and competitive advantage in the rapidly evolving business landscape.

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Final thoughts

The survey conducted by Office Samurai and ABSL has provided a comprehensive overview of the current state and future trends of AI maturity within SSC and BPO organizations. **Through analyzing the responses from 48 organizations across various industries and regions,** we have gained valuable insights into the adoption, challenges, and expectations related to AI technologies such as Robotic Process Automation (RPA), Intelligent Document Processing (IDP), Machine Learning (ML), AI Conversational Platforms (AICP), and Generative AI (GenAI).

Key observations

Diverse Maturity Levels

The AI maturity levels across SSC/BPO organizations vary significantly. While some organizations are at the forefront, continuously innovating and integrating AI deeply into their operations, many others are still in exploratory or early adoption phases. This diversity underscores the dynamic nature of AI adoption, influenced by factors such as organizational capacity, industry-specific needs, and technological readiness.

Strategic Importance of AI

A substantial number of organizations recognize AI as a strategic component of their long-term business objectives. However, there remains a significant portion of organizations that are either in the process of defining their AI strategies or have yet to fully commit to a definitive AI path. This highlights an ongoing journey towards AI maturity, with many organizations actively working towards understanding and integrating AI into their core strategies.

RPA as a Pioneering Technology

RPA stands out as the most mature and widely adopted technology in the survey within the SSC/BPO sector. Many organizations have achieved operational integration, leveraging RPA to enhance efficiency and productivity. This widespread adoption reflects RPA's established role in automating repetitive tasks and driving tangible business value. For many organizations, RPA will be the cornerstone of their automation programs, providing a solid foundation upon which other AI technologies can build. As organizations integrate Intelligent Document Processing (IDP), Machine Learning (ML), AI Conversational Platforms (AICP), and Generative AI (GenAI), these technologies will enhance the potential of RPA, enabling the automation of even more complex and sophisticated processes.

Emerging Technologies

Technologies such as IDP, ML, AICP, and GenAI are in various stages of adoption. While IDP and ML show progress with some organizations reaching operational integration, AICP and GenAI are still largely in the exploratory and early adoption phases. The interest in these emerging technologies is strong, with many organizations planning to explore and expand their use in the near future.

Future Outlook

The future plans for AI adoption indicate a strong desire to expand and refine the use of these technologies. Organizations are not only aiming to scale their existing initiatives but also seeking to push for innovation and set industry benchmarks. This optimism reflects a recognition of the transformative potential of AI in driving business efficiencies and innovation.

Challenges and Opportunities

Despite the promising outlook, **several challenges need** to be addressed to enhance AI maturity within SSC/BPO organizations:

Technical and Data Challenges

Implementing advanced AI technologies requires substantial technical expertise and robust data management capabilities. Organizations need to invest in building their technical infrastructure and upskilling their workforce to effectively leverage AI.

Ethical and Legal Considerations

The adoption of AI brings with it ethical, legal, and social implications. Organizations must navigate these complexities by establishing clear guidelines and frameworks to ensure responsible AI usage.

Change Management

Integrating AI into business operations often requires significant organizational change. Effective change management strategies are essential to address resistance, align stakeholders, and ensure successful AI adoption.

Conclusion

The survey results highlight a sector on the cusp of significant transformation through AI. While there are varying levels of maturity and readiness, the overall direction is clear: **AI is set to play an increasingly critical role in shaping the future of SSC/BPO operations.**

As the landscape of AI continues to evolve, ongoing research, collaboration, and knowledge sharing will be crucial. By leveraging the insights gained from this survey, SSC/BPO organizations can chart a strategic path towards AI maturity, driving innovation, efficiency, and value creation in the years to come.

This report, prepared by Office Samurai and ABSL, serves as a foundational resource for understanding the current AI maturity level and future potential within the SSC/BPO sector.

Organizations that proactively embrace AI, invest in the necessary capabilities, and navigate the associated challenges will be well-positioned to achieve substantial **competitive advantages.**

We encourage organizations to use these insights to inform their AI strategies and embark on their **AI maturity journey** with confidence and clarity.
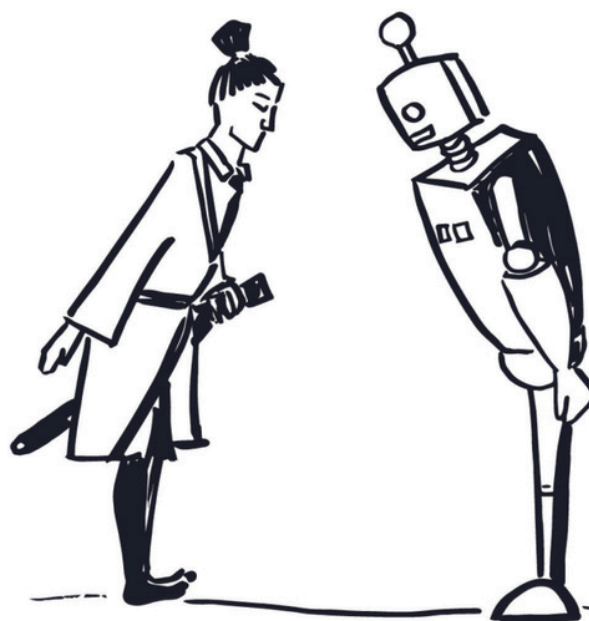
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