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Business AI: Relevant, Reliable, and Responsible

How Business AI Is Delivering Real Results for Organizations in Outcomes, Improved Business Processes, and Productivity

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In This InfoBrief

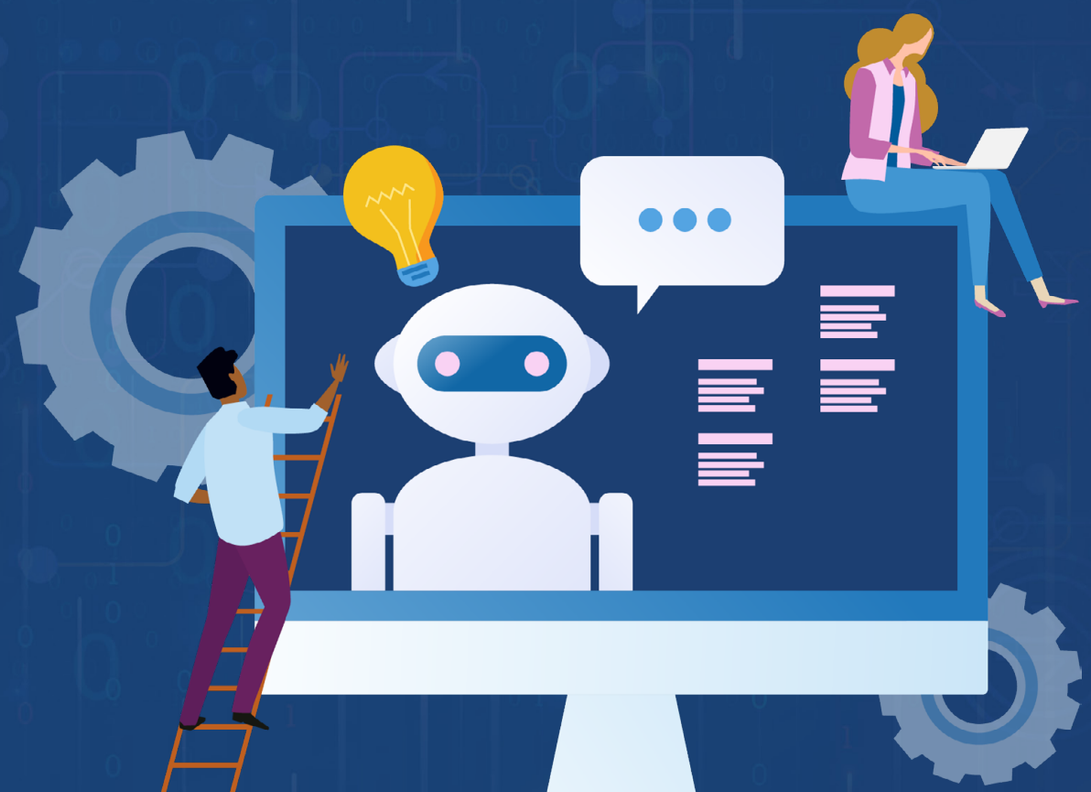
AI is changing everything.
From consumer retail to supply logistics, predictive, prescriptive, and generative AI (GenAI) is changing the way enterprises approach and do business. The business of AI is becoming increasingly critical to organizations globally.

- The purpose of this InfoBrief is to **examine the business of AI and explain what is happening** in this important business transformation area and why.
- **IDC conducted an expansive survey of organizations worldwide to assess their approach to and use of AI.** IDC also conducted extensive interviews with organizations on this topic. The following pages outline its findings and conclusions about how the business of AI will change industries, organizations, and their business processes.

The Beginning of the AI Everywhere Era

Generative AI has fueled a revolution in innovation.

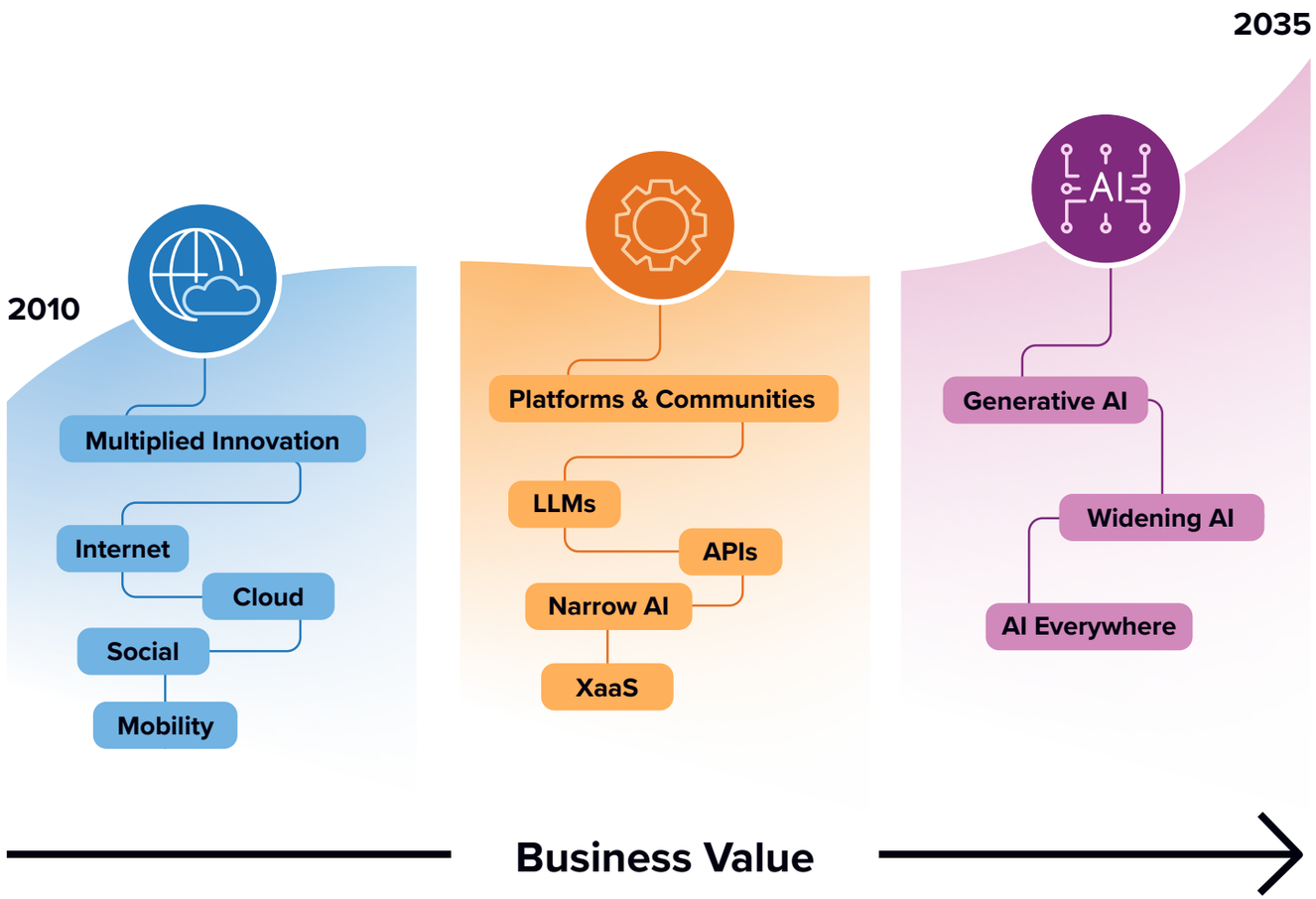
Large organizations will invest millions of dollars annually to improve productivity, creativity, and efficiency in the next several years.



AI Everywhere

IDC believes that the transition to AI Everywhere will see the emergence of a range of new GenAI-driven use cases at an individual level (productivity basis), a business function level, and in an industry-specific context, especially within ERP.

A key component of this is a consistent cloud ERP strategy, which leverages scalable cloud infrastructures to ensure data security and compliance, the high performance of demanding computing power, sustainable data growth, and technology openness to facilitate real-time insights and decision-making within the ERP. This ensures streamlined data management, enables agile resource allocation, minimizes expenses, automates processes, provides data security, and empowers users with data-driven decision-making.



IDC FutureScape Predictions

"**By mid-2025,**

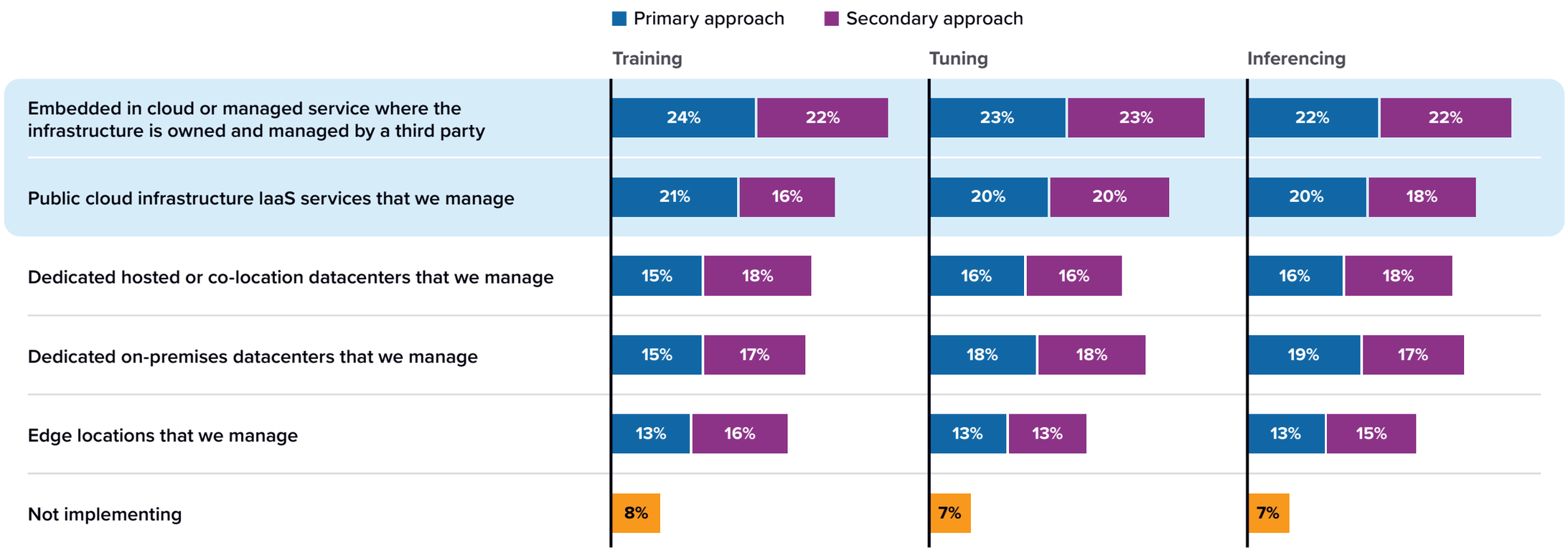
of end users will **leverage AI-infused applications,** moving from systems of record to **systems of intelligent planning,** providing a lens toward better outcomes."

"**GenAI will reinvent the refactoring of legacy apps,** with enterprises utilizing GenAI tools and cloud service provider platforms to initiate and **execute 75% of code conversion and development tasks by 2027."**

So, what does this mean for business? Read on!

Cloud Services and Infrastructure to Become the Preferred Deployment Model for GenAI

Over the next 18 months, what will be your organization's primary approach to deploying and managing infrastructure resources for GenAI? What will be its secondary approach?

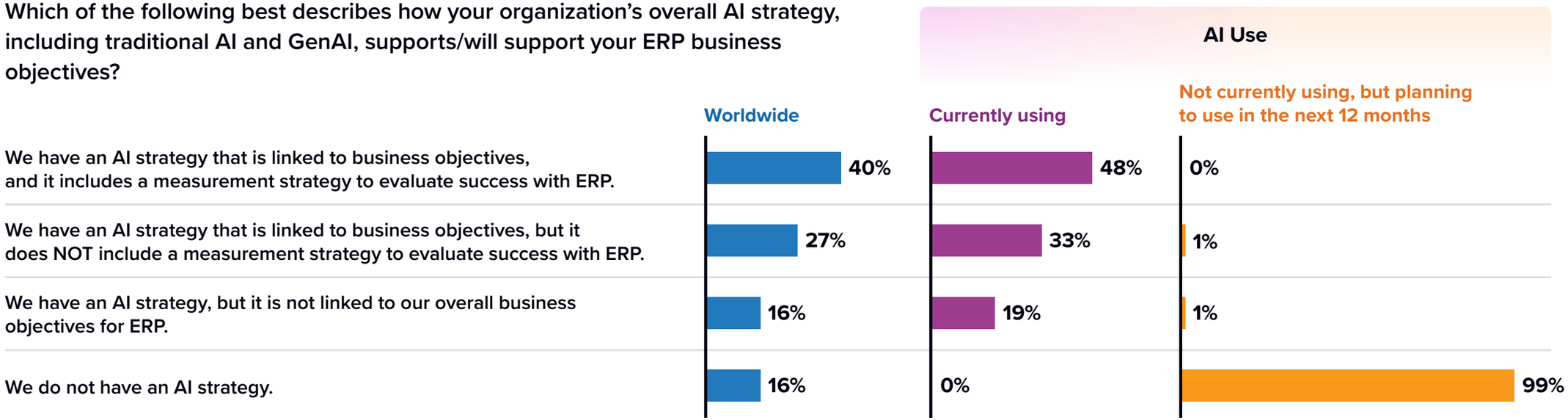


Note: Data weighted by IT spend (500+ employee size). n = 883; Source: IDC's *Future Enterprise Resiliency & Spending Survey*, Wave 7, August 2023 | For an accessible version of the data on this page, see Supplemental Data in the Appendix.

The Importance of AI Strategy

Organizations are realizing that their AI strategy must tie in to their business objectives.

Which of the following best describes how your organization's overall AI strategy, including traditional AI and GenAI, supports/will support your ERP business objectives?



n = 1,205 (all respondents), n = 920 (currently using), n = 285 (not currently using but planning to use in the next 12 months); Source: IDC's *ERP AI Selling Strategies & Messaging Study*, November 2023 | For an accessible version of the data on this page, see Supplemental Data in the Appendix.

VP of Finance of a privately owned multibranch, multichannel retailer:

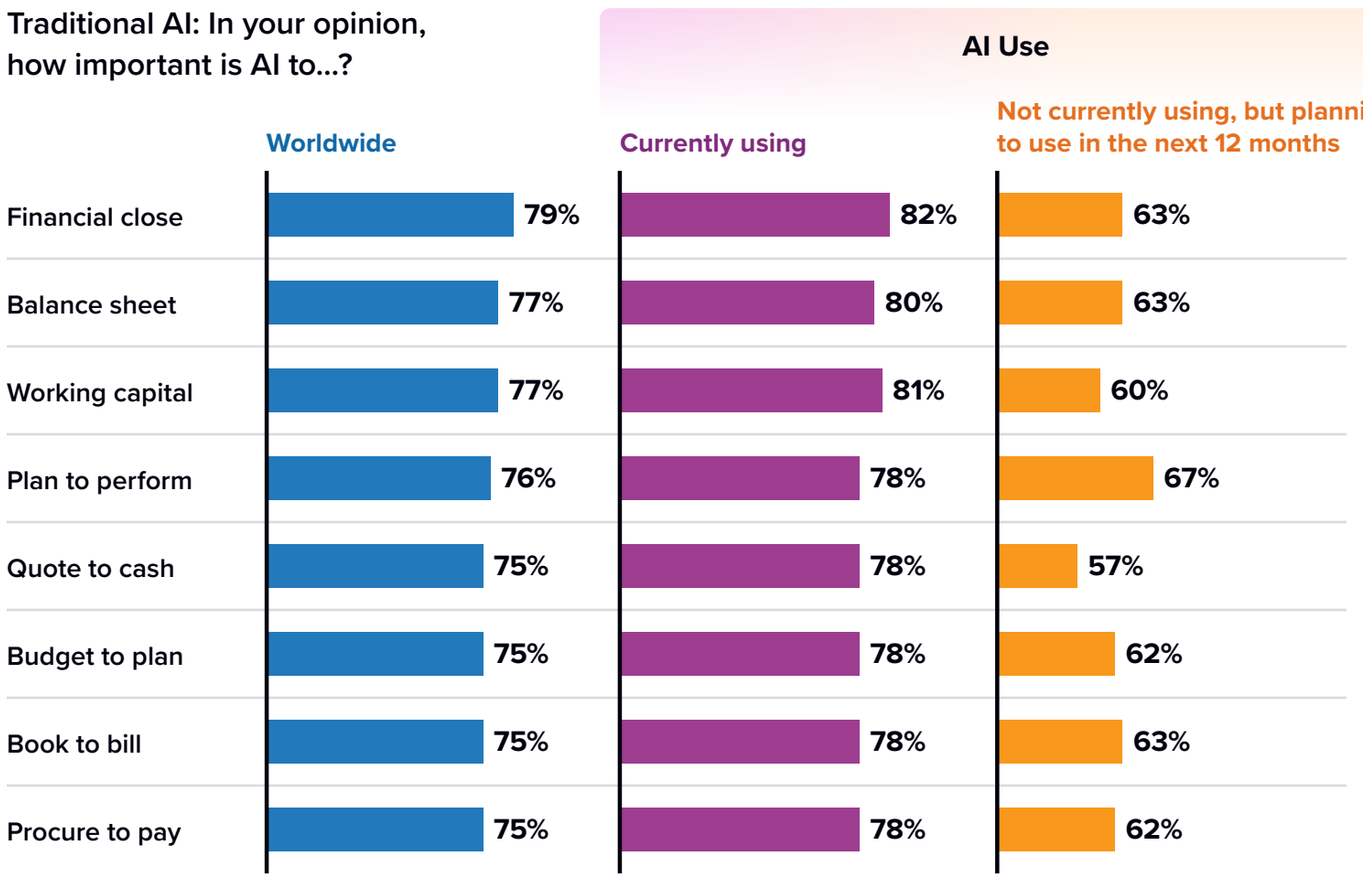
He sees **GenAI as having a role in preparing and indicating insights and analysis** but believes that a human perspective will always be required. He very much sees his role as a senior finance manager not just as managing data but as telling a story — explaining what is going on to the rest of senior management — and considers **AI to help with but not take over this function.**

He insists on a "clean core" strategy to avoid the complexity and costs of personalizing each update, which he sees coming frequently (monthly).

Embedding AI in Business Processes

Organizations are using embedded AI in a variety of business processes.

Traditional AI: In your opinion, how important is AI to...?



Head of IT development for a medium-sized Danish kitchen manufacturer:

They see the initial benefits of **AI as accelerating the process of data cleansing and data migration** from one table structure to a different one in a new application.

They consider **AI to improve business resilience** by processing data and identifying risks faster and more effectively.

Head of IT and Data Security for a large U.S. global software provider in the healthcare sector (30,000 staff worldwide):

"We see the biggest opportunities in automating and speeding up key processes, including in particular the monthly close and anything where large-scale checking and verification is involved, including our extensive intercompany accounting and reconciliation. ***AI's capability to deal with natural language is one of the attractions for us."***

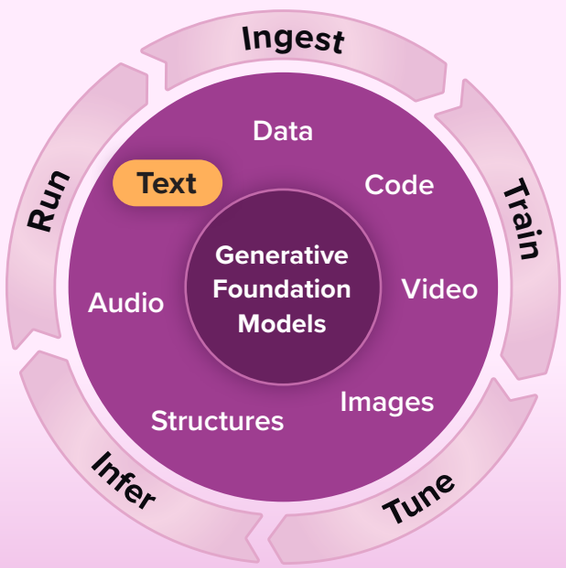
n = 1,205 (all respondents), n = 920 (currently using), n = 285 (not currently using but planning to use in the next 12 months); Source: IDC's *ERP AI Selling Strategies & Messaging Study*, November 2023 | For an accessible version of the data on this page, see Supplemental Data in the Appendix.

GenAI Use Case: Data Extraction Invoices and Receipts for Accounts Payable

Description

Working in tandem with technologies such as OCR and machine learning, **GenAI can find and extract patterns in business transaction documents,** including purchase orders, invoices, supplier notes, and receipts.

Data Modality



Business Impact

More efficient invoice processing leads to faster payments.

Metrics

- P2P staff FTE
- Data extraction time
- Days payable outstanding

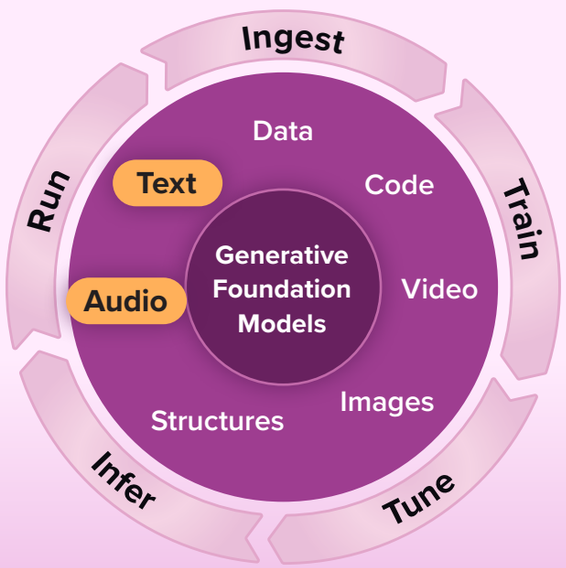
Risk Level	Complexity
High	High
Medium	**Medium**
Low	Low

GenAI Use Case: Contact Center Real-Time Intelligent Recommendations

Description

Based on the summary, sentiment analysis, and content, **AI can propose intelligent recommendations to solve a specific issue or address concerns.** In some situations, AI can execute the resolution completely autonomously and create the relevant transactions automatically, while others require a human in the loop.

Data Modality



Business Impact

- Improved customer empathy
- Enhanced agent assistance
- Multiple pathways to satisfy customer demands in real time

Metrics

- Improved CSAT scores
- Faster call-to-resolution time

Risk Level	Complexity
High	High
Medium	**Medium**
Low	Low

GenAI Use Case: Supply Chain Orchestration for Planning

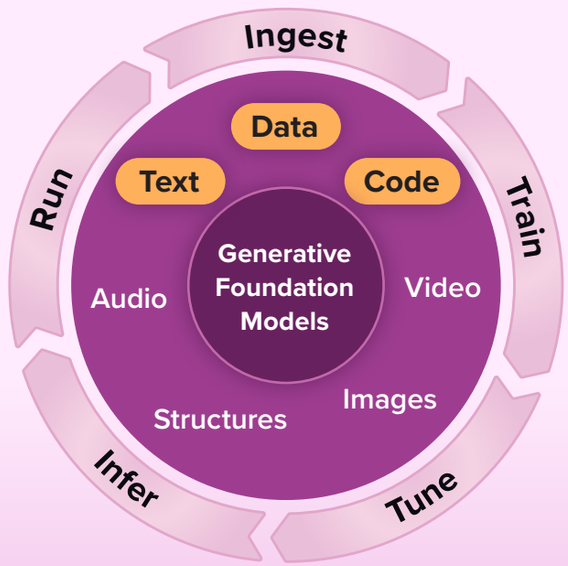
Description

By leveraging LLM/unstructured data, SCO tools will be able to **support the integration of information across all silos of the supply chain and connect internal and external data.** By integrating standard data (such as track and trace, manufacturing WIP, and inventory) with unstructured data (news, emails, texts/DMs, phone discussions, and meeting minutes), SCO tools can evolve to further integrate and automate end-to-end orchestration.

Example

By being "aware" of all data (internal and external) across the nodes of a supply chain (including forecasts, WIP, track and trace, S&OP, warehousing, and retail), GenAI tools in SCO sense shifts in the physical world, which will impact plans. If a factory is running behind schedule, a vessel is delayed, or a spike in consumer demand occurs, SCO tools can read and react to suggest response scenarios and improve response times. As some tasks (such as accepting a PO change) become routine, SCO tools using AI can automate these steps with exception management parameters.

Data Modality



Business Impact

- Improved response times
- Increased visibility
- Increased end-to-end integration
- Improved workloads (SKUs/revenue-per-employee increase)

Metrics

- Response time to disruption
- SKU/revenue/changes managed per employee
- Reduced inventory costs

Risk Level	Complexity
High	**High**
Medium	Medium
Low	Low

Targeted Business Outcomes

Organizations are working on achieving several business outcomes with AI. Chief among these is cost savings, with increased profits, productivity, efficiency, and competitive differentiation following closely.

The outcomes most important to organizations vary by region, notably cost savings in North America (NA) and Asia/Pacific (AP) versus higher employee productivity in Western Europe (WE) and Latin America (LA).

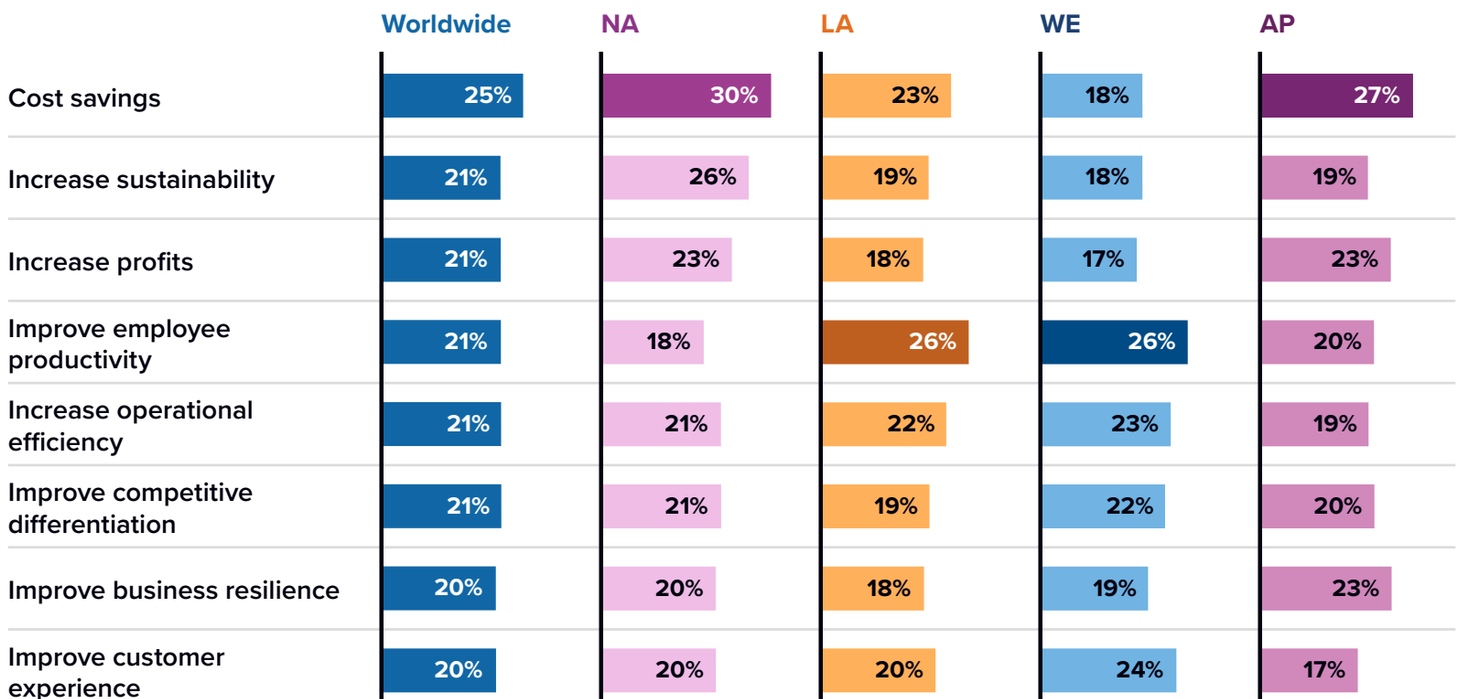
CFO of a multinational apparel retailer:

They have begun to use traditional AI to facilitate account reconciliation, invoice/PO management, and other basic financial reporting operations and GenAI to assist with forecasting.

They believe that **AI will also make the business more agile** and certainly improve supply chain management. They consider it essential for competitiveness and believe that it can make the business leaner and less complex.

They see **AI as improving the customer experience,** helping to reduce returns, and improving customer marketing.

Which of the following are the three most important business outcomes that your organization is trying to achieve from leveraging AI, including traditional AI and GenAI, for ERP?

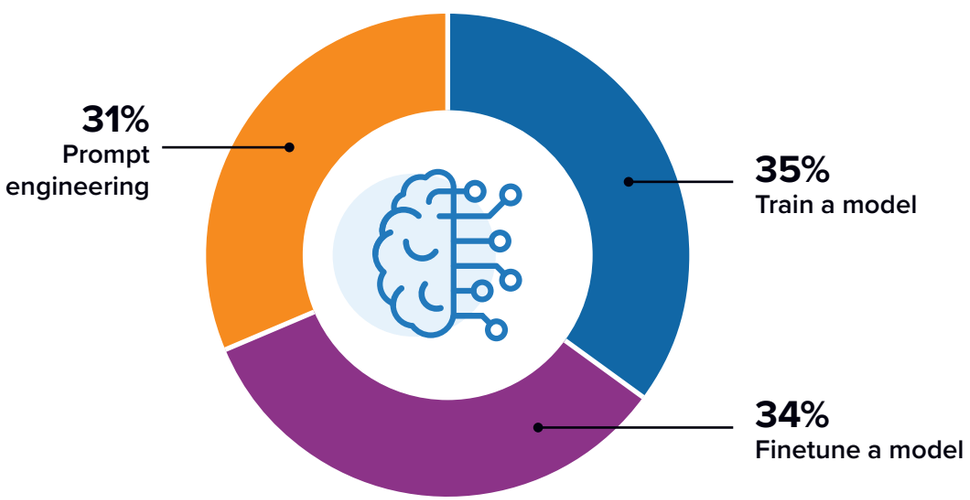


n = 1,025 (worldwide), n = 201 (NA), n = 201 (LA), n = 403 (WE), n = 400 (AP); Source: IDC's *ERP AI Selling Strategies & Messaging Study*, November 2023 | For an accessible version of the data on this page, see Supplemental Data in the Appendix.

In-House Development Versus Outsourcing

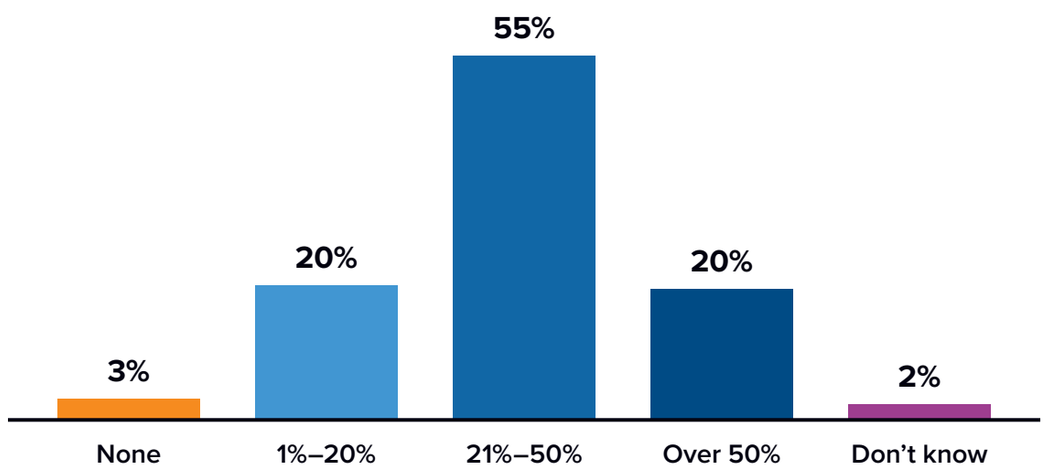
Organizations use various methods to deploy AI. As the figures below demonstrate, 35% of organizations are developing their own models while 65% use preexisting models. Overall, they expect one-third of their GenAI use cases to integrate seamlessly with applications and solutions they're already using.

For what percentage of GenAI use cases do you plan to train versus finetune foundation models or just use prompt engineering?



For what percentage of GenAI use cases do you expect the solution to integrate seamlessly with technology solutions (e.g., predictive AI) and/or other software services that you use?

(% of respondents)



Notes: Managed by IDC's Global Primary Research Group; data weighted by IT spending by country; use caution when interpreting small sample sizes.
n = 607 (worldwide), n = 255 (NA), n = 151 (Europe); Base = All Respondents; Source: IDC's *Global AI (including GenAI) Buyer Sentiment, Adoption, and Business Value Survey,* October 2023

In-House Development Versus Outsourcing (continued)

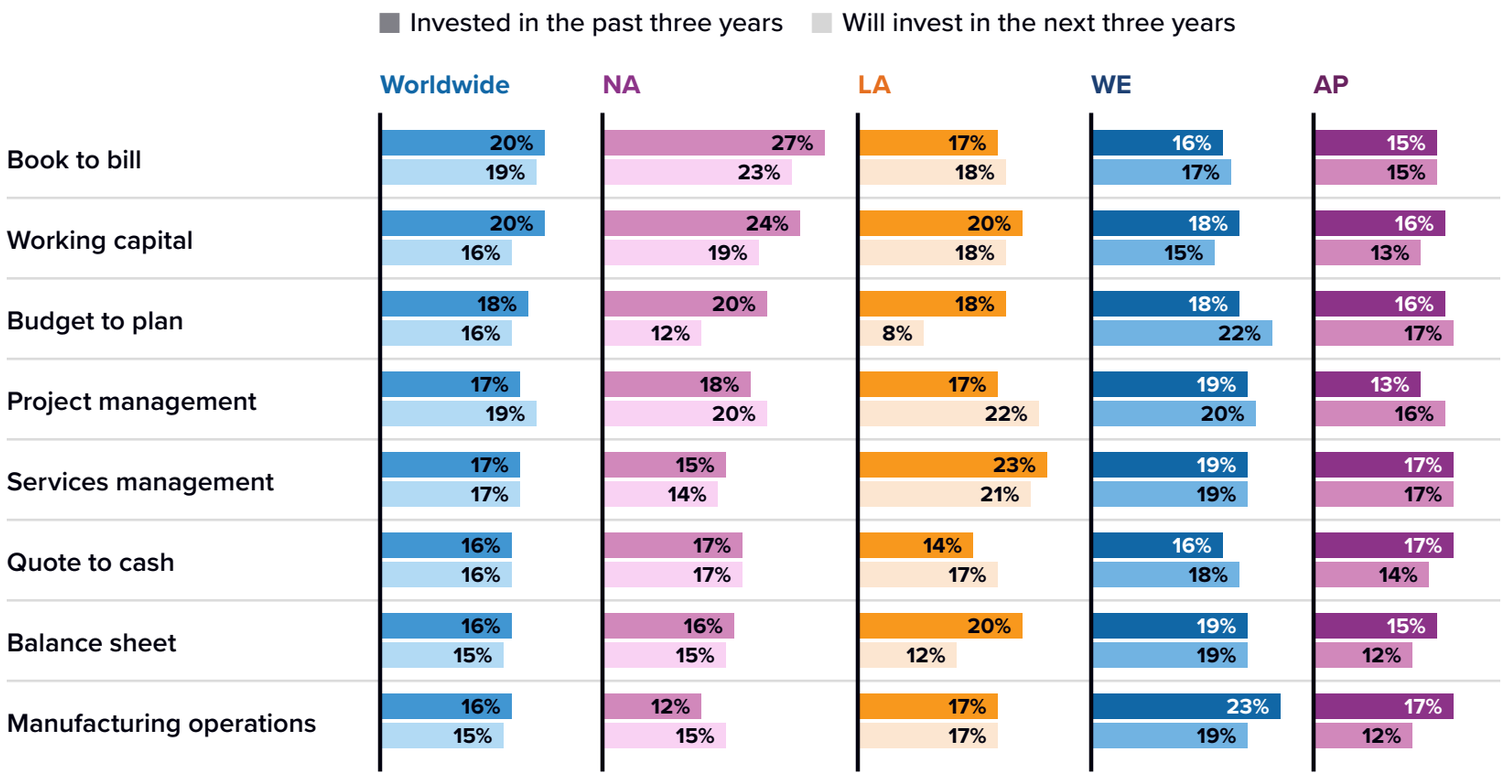
What challenges have you experienced/do you expect to experience when implementing AI technology at your organization?

n = 607 (worldwide); Source: IDC's *Global AI (including GenAI) Buyer Sentiment, Adoption, and Business Value Survey*, October 2023

AI Use Cases Across ERP Are Changing the Way Businesses Work

Organizations are investing in AI-powered solutions for a wide variety of ERP business processes and gaining immediate optimization capabilities, enhanced decision-making, and improved efficiency.

For which of these end-to-end business processes has your organization invested in AI-powered ERP in the past three years? For which will it invest in the next three years?



Invested in the past three years: n = 920 (worldwide), n = 170 (NA) n = 125 (LA), n = 317 (WE), n = 308 (AP); Will invest in the next three years: n = 1,025 (worldwide), n = 201 (NA), n = 201 (LA), n = 403 (WE), n = 400 (AP);
Source: IDC's *ERP AI Selling Strategies & Messaging Study*, November 2023

For an accessible version of the data on this page, see Supplemental Data in the Appendix.

Assessing Value and Willingness to Pay

Organizations **purchase innovation packages** (or receive them as part of a package).

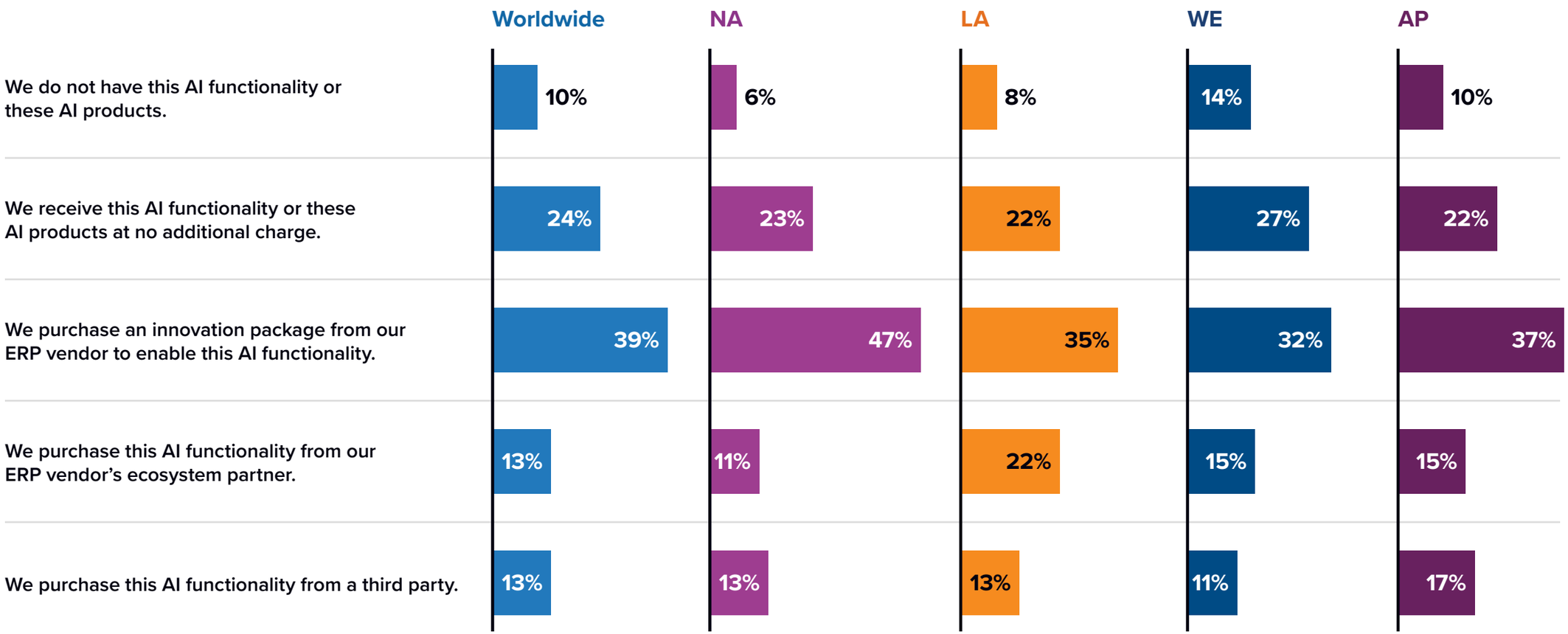
Organizations **are willing to pay for AI functionality:** About half are willing to pay a **1%–10% premium over the current cost,** and about one-third are willing to pay **a premium of up to 20%.**

Organizations **want GenAI packaging to be similar to traditional AI packaging.**

Source: IDC's *Cloud as the Platform for AI Innovation Survey,* November 2023

How Do Organizations Pay for AI?

Traditional AI: How are you paying/do you plan to pay for ERP applications' AI functionality or products?

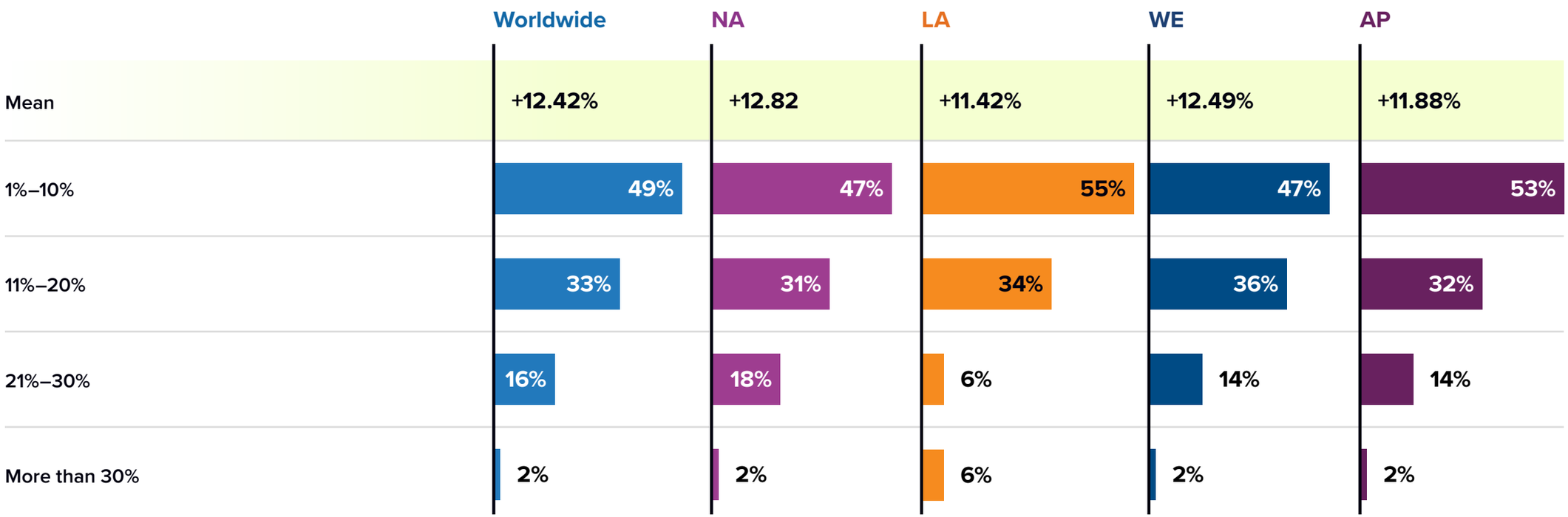


n = 1,025 (worldwide), n = 201 (NA), n = 201 (LA), n = 403 (WE), n = 400 (AP); Source: IDC's *ERP AI Selling Strategies & Messaging Study*, November 2023 | For an accessible version of the data on this page, see Supplemental Data in the Appendix.

How Do Organizations Pay for AI? (continued)

Approximately half of organizations are willing to pay 1%–10%, while one-third are willing to pay up to 20% of their ERP application costs for AI functionality.

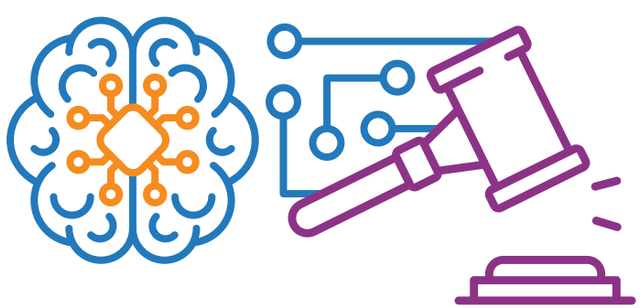
Traditional AI: You indicated that you purchase AI functionality or products. How much are you paying/willing to pay for AI functionality relative to the cost of your ERP application?



n = 787 (worldwide), n = 135 (NA), n = 139 (LA), n = 236 (WE), n = 277 (AP); Source: IDC's *ERP AI Selling Strategies & Messaging Study*, November 2023 | For an accessible version of the data on this page, see Supplemental Data in the Appendix.

Ethics and Data Privacy

AI brings not only unprecedented opportunities to businesses but also an incredible responsibility. Its direct impact on people's lives has raised considerable questions about AI ethics, data governance, trust, legality, and unintended negative consequences. Organizations face a potentially negative business impact if they do not mitigate AI business risks adequately.

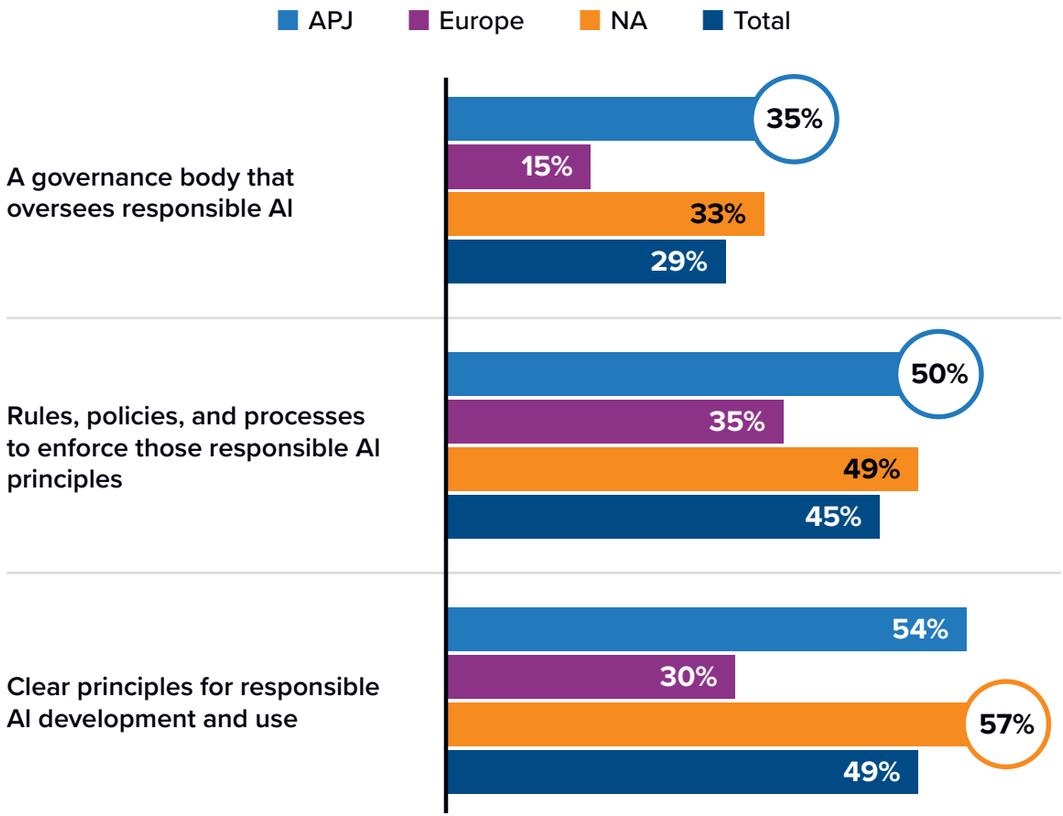


Responsible AI Attributes

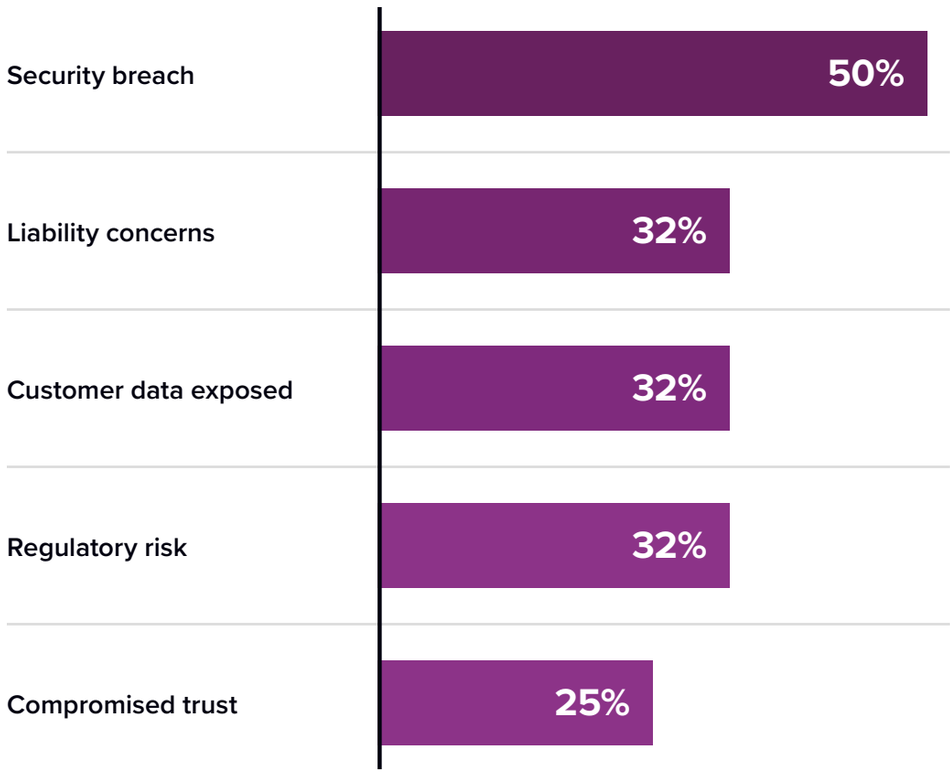
- **Core values and governance:** These define and articulate RAI's mission and principles, supported by the C-suite, while establishing a clear governance structure across the organization that builds confidence and trust in AI technologies.
- **Risk management and compliance:** These strengthen compliance with stated principles and current laws and regulations while monitoring future ones. They also help develop policies to mitigate risk and operationalize those policies through a risk management framework involving regular reporting and monitoring.
- **Technologies:** Technologies develop tools and techniques to support principles such as fairness, explainability, robustness, accountability, and privacy and build these in to AI systems and platforms.
- **Workforce:** Employees empower leadership to elevate RAI as a critical business imperative and provide all staff with training to give them a clear understanding of RAI principles and how to translate them into actions. Training the broader workforce is paramount for ensuring RAI adoption.

Responsible AI: State of the Union

Which of the following are currently in place at your organization?



What are the main concerns your responsible AI policy is protecting against?



**Responsible AI is the practice of designing, developing, and deploying AI in a way that ensures fairness, reliability, safety, privacy, security, inclusiveness, transparency, and accountability.

n = 607 (worldwide), n = 255 (NA), n = 151 (Europe), n = 201 (AP and Japan); Source: IDC's *Global AI (including GenAI) Buyer Sentiment, Adoption, and Business Value Survey*, October 2023

For an accessible version of the data on this page, see Supplemental Data in the Appendix.

How to Prepare for AI's Long-Term Impact

1

Clearly define business objectives, use cases, and value measurement.

Assess build versus buy at a use-case level.

Partner with trusted technology solution suppliers and service providers.

2

Establish a clear operating model along with leadership support that empowers an agile culture and experimentation.

3

Determine whether your data application and data platform are AI-ready.

Reimagine the technology function, and upgrade the enterprise technology architecture.

4

Develop and establish processes, controls, and accountability structures around data privacy, security, and the responsible use of AI, and inhibit nefarious scenarios.

5

Engage in proactive change management that impacts the workforce.

Invest in reskilling/ upskilling and/or hiring and contract resources.

Appendix: Supplemental Data

The tables in this appendix provide accessible versions of the data for the complex figures in this document. Click "Return to original figure" below these tables to get back to the original data figures.

SUPPLEMENTAL DATA FROM PAGE 7

Over the next 18 months, what will be your organization's primary approach to deploying and managing infrastructure resources for GenAI? What will be its secondary approach?

	Training		Tuning		Inferencing	
	Primary Approach	Secondary Approach	Primary Approach	Secondary Approach	Primary Approach	Secondary Approach
Embedded in cloud or managed service where the infrastructure is owned and managed by a third party	24%	22%	23%	23%	22%	22%
Public cloud infrastructure IaaS services that we manage	21%	16%	20%	20%	20%	18%
Dedicated hosted or co-location datacenters that we manage	15%	18%	16%	16%	16%	18%
Dedicated on-premises datacenters that we manage	15%	17%	18%	18%	19%	17%
Edge locations that we manage	13%	16%	13%	13%	13%	15%
Not implementing	8%		7%		7%	

Note: Data weighted by IT spend (500+ employee size). n = 883; Source: IDC's *Future Enterprise Resiliency & Spending Survey*, Wave 7, August 2023

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Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 8

Which of the following best describes how your organization's overall AI strategy, including traditional AI and GenAI, supports/will support your ERP business objectives?

	Worldwide	Currently Using	Not Currently Using, but Planning to Use in the Next 12 Months
We have an AI strategy that is linked to business objectives, and it includes a measurement strategy to evaluate success with ERP.	40%	48%	0%
We have an AI strategy that is linked to business objectives, but it does NOT include a measurement strategy to evaluate success with ERP.	27%	33%	1%
We have an AI strategy, but it is not linked to our overall business objectives for ERP.	16%	19%	1%
We do not have an AI strategy.	16%	0%	99%

n = 1,205 (all respondents), n = 920 (currently using), n = 285 (not currently using but planning to use in the next 12 months); Source: IDC's *ERP AI Selling Strategies & Messaging Study*, November 2023

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Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 9

Traditional AI: In your opinion, how important is AI to...?

	Worldwide	Currently Using	Not Currently Using, but Planning to Use in the Next 12 Months
Financial close	79%	82%	63%
Balance sheet	77%	80%	63%
Working capital	77%	81%	60%
Plan to perform	76%	78%	67%
Quote to cash	75%	78%	57%
Budget to plan	75%	78%	62%
Book to bill	75%	78%	63%
Procure to pay	75%	78%	62%

n = 1,205 (all respondents), n = 920 (currently using), n = 285 (not currently using, but planning to use in the next 12 months); Source: IDC's *ERP AI Selling Strategies & Messaging Study,* November 2023

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Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 13

Which of the following are the three most important business outcomes that your organization is trying to achieve from leveraging AI, including traditional AI and GenAI, for ERP?

	Worldwide	NA	LA	WE	AP
Cost savings	25%	30%	23%	18%	27%
Increase sustainability	21%	26%	19%	18%	19%
Increase profits	21%	23%	18%	17%	23%
Improve employee productivity	21%	18%	26%	26%	20%
Increase operational efficiency	21%	21%	22%	23%	19%
Improve competitive differentiation	21%	21%	19%	22%	20%
Improve business resilience	20%	20%	18%	19%	23%
Improve customer experience	20%	20%	20%	24%	17%

n = 1,025 (worldwide), n = 201 (NA), n = 201 (LA), n = 403 (WE), n = 400 (AP); Source: IDC's *ERP AI Selling Strategies & Messaging Study*, November 2023

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Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 16

For which of these end-to-end business processes has your organization invested in AI-powered ERP in the past three years? For which will it invest in the next three years?

	Worldwide		NA		LA		WE		AP	
	Invested in the past 3 years	Will invest in the next 3 years	Invested in the past 3 years	Will invest in the next 3 years	Invested in the past 3 years	Will invest in the next 3 years	Invested in the past 3 years	Will invest in the next 3 years	Invested in the past 3 years	Will invest in the next 3 years
Book to bill	20%	19%	27%	23%	17%	18%	16%	17%	15%	15%
Working capital	20%	16%	24%	19%	20%	18%	18%	15%	16%	13%
Budget to plan	18%	16%	20%	12%	18%	8%	18%	22%	16%	17%
Project management	17%	19%	18%	20%	17%	22%	19%	20%	13%	16%
Services management	17%	17%	15%	14%	23%	21%	19%	19%	17%	17%
Quote to cash	16%	16%	17%	17%	14%	17%	16%	18%	17%	14%
Balance sheet	16%	15%	16%	15%	20%	12%	19%	19%	15%	12%
Manufacturing operations	16%	15%	12%	15%	17%	17%	23%	19%	17%	12%

Invested in the past three years: n = 920 (worldwide), n = 201 (NA), n = 170 (NA) n = 125 (LA), n = 317 (WE), n = 308 (AP);

Will invest in the next three years: n = 1,025 (worldwide), n = 201 (NA), n = 201 (LA), n = 403 (WE), n = 400 (AP); Source: IDC's *ERP AI Selling Strategies & Messaging Study*, November 2023

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Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 18

Traditional AI: How are you paying/do you plan to pay for ERP applications' AI functionality or products?

	Worldwide	NA	LA	WE	AP
We do not have this AI functionality or these AI products.	10%	6%	8%	14%	10%
We receive this AI functionality or these AI products at no additional charge.	24%	23%	22%	27%	22%
We purchase an innovation package from our ERP vendor to enable this AI functionality.	39%	47%	35%	32%	37%
We purchase this AI functionality from our ERP vendor's ecosystem partner.	13%	11%	22%	15%	15%
We purchase this AI functionality from a third party.	13%	13%	13%	11%	17%

n = 1,025 (worldwide), n = 201 (NA), n = 201 (LA), n = 403 (WE), n = 400 (AP); Source: IDC's *ERP AI Selling Strategies & Messaging Study*, November 2023

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Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 19

Traditional AI: You indicated that you purchase AI functionality or products. How much are you paying/willing to pay for AI functionality relative to the cost of your ERP application?

	Worldwide	NA	LA	WE	AP
Mean	+12.42%	+12.82%	+11.42%	+12.49%	+11.88%
1%–10%	49%	47%	55%	47%	53%
11%–20%	33%	31%	34%	36%	32%
21%–30%	16%	18%	6%	14%	14%
More than 30%	2%	2%	6%	2%	2%

n = 787 (worldwide), n = 135 (NA), n = 139 (LA), n = 236 (WE), n = 277 (AP); Source: IDC's *ERP AI Selling Strategies & Messaging Study*, November 2023

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SUPPLEMENTAL DATA FROM PAGE 21

Which of the following are currently in place at your organization?

	APJ	Europe	NA	Total
A governance body that oversees responsible AI	35%	15%	33%	29%
Rules, policies, and processes to enforce those responsible AI principles	50%	35%	49%	45%
Clear principles for responsible AI development and use	54%	30%	57%	49%

n = 607 (worldwide), n = 255 (NA), n = 151 (Europe), n = 201 (AP and Japan); Source: IDC's *Global AI (including GenAI) Buyer Sentiment, Adoption, and Business Value Survey*, October 2023

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About the IDC Analysts

Ritu Jyoti
Group Vice President, Worldwide Artificial Intelligence and Automation Research Practice, Global AI Research Lead, IDC

Ritu is group vice president, covering worldwide artificial intelligence and automation research with IDC's Software Market Research and Advisory Practice. Ritu is responsible for leading the development of IDC's thought leadership for AI research and managing the research team. Her research focuses on the state of enterprise AI efforts and global market trends for rapidly evolving AI and machine learning innovations and ecosystems. She also leads insightful research that addresses the needs of AI technology vendors and provides actionable guidance on how to crisply articulate their value proposition, differentiate, and thrive in the digital era.

More about Ritu Jyoti

Mickey North Rizza
Group Vice President, Enterprise Software, IDC

Mickey leads the Enterprise Applications and Strategies research service along with a team of analysts responsible for IDC's coverage of next generation of enterprise applications including digital commerce, employee experience, enterprise asset management and smart facilities, ERP, financial applications, HCM and payroll applications, procurement, professional services automation and related project-based solutions software, supply chain automation, and talent acquisition and strategies. In her role, Mickey and the team advises clients on these intelligent, modern, and modular enterprise applications for businesses of all sizes with an emphasis on the key trends, opportunities, innovation and the IT and Business Buyer concerns, requirements, and buyer behaviors.

More about Mickey North Rizza

About the IDC Analysts (continued)

Dave Schubmehl
Research Vice President,
Conversational Artificial Intelligence and
Intelligent Knowledge Discovery, IDC

Dave Schubmehl is Research Vice President for IDC's Conversational Artificial Intelligence and Intelligent Knowledge Discovery research. His research covers information access and artificial intelligence (AI) technologies around conversational AI technologies including speech AI and text AI, machine translation, embedded knowledge graph creation, intelligent knowledge discovery, information retrieval, unstructured information representation, knowledge representation, deep learning, machine learning, unified access to structured and unstructured information, chatbots and digital assistants, and rich media search in SaaS, cloud, and installed software environments. This research analyzes the trends and dynamics of the Text and Audio AI software markets and the costs, benefits, and workflow impact of solutions that use these technologies.

More about Dave Schubmehl

Message from the Sponsor

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