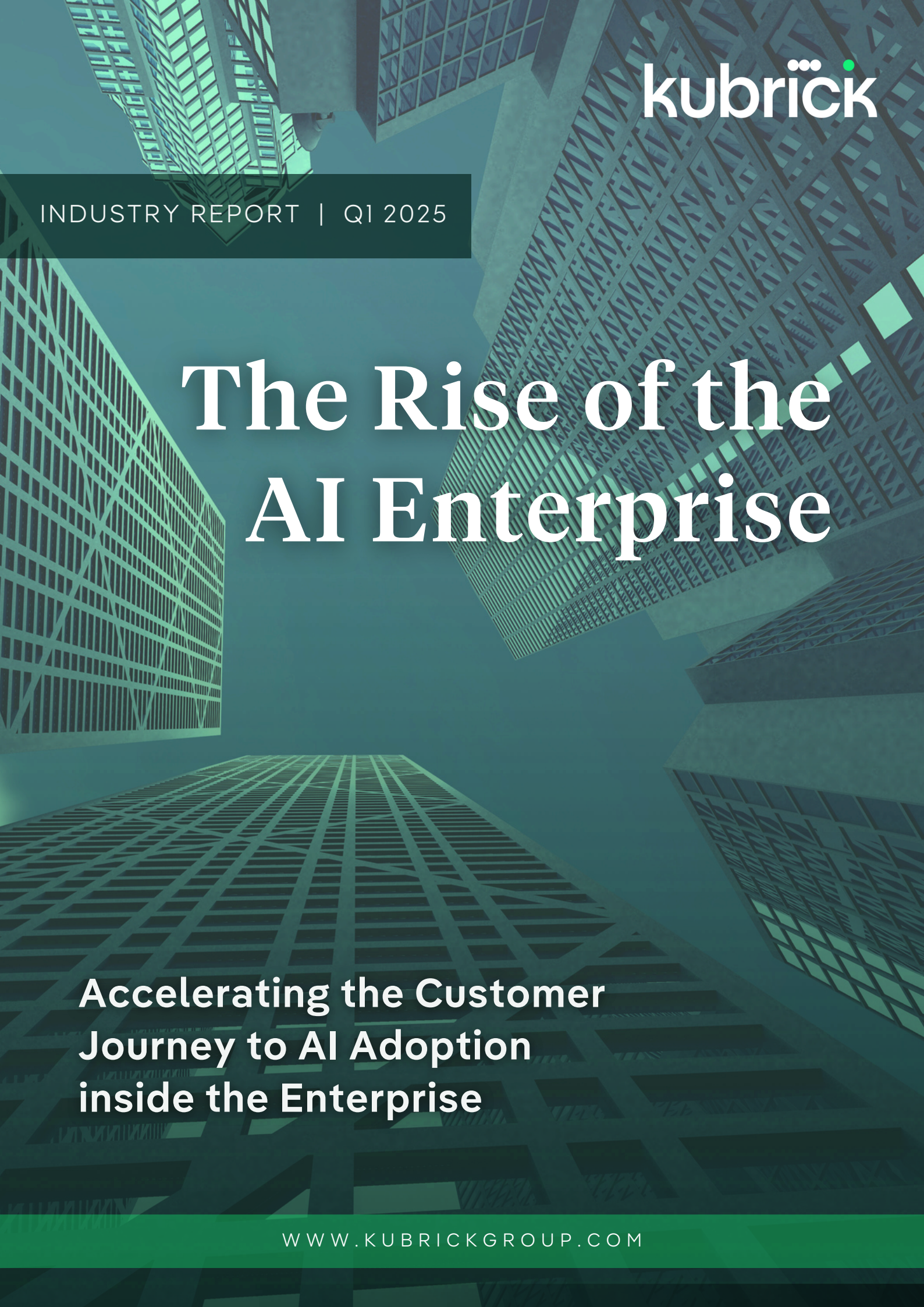

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INDUSTRY REPORT | Q1 2025

The Rise of the AI Enterprise

Accelerating the Customer Journey to AI Adoption inside the Enterprise

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CONTENTS

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EXECUTIVE SUMMARY

Day by day, AI is growing ever more present in the lives of individuals, organziations, and society at large.

In today's digital world, where information is abundant, accessible, and often free, the advent of AI has become a global phenomenon which is challenging organizations across sectors to evolve faster than before; leaders are being challenged by the risk of competition, incentivized by the prospect of increased productivity, and divided by the conflict between the consumers who want to embrace AI and those who fear it.

The heightened awareness of the AI zeitgeist is creating a black box paradox: consumers think they know about the technology in their hands, but as the models and systems become more complex, the less their creators understand – including the world's top data and AI scientists[1]. Inside organizations, this sensationalism of AI is transforming the roles of IT & data functions, who are the creators and purveyors of this product, and the Executives and business users, as the consumers.

These changing roles are creating a newfound point of tension between technology and business teams as the impact of technology becomes more intrinsic to strategic goals, rather than simply providing the infrastructure to function. Teams will need to find a way to unify in their ways of working, approaches, and outcomes or risk investing in AI that doesn't deliver against the measures of success that are meaningful.

This is a pivotal moment for the outlook and culture of data teams; as business models and services change because of AI, so will the technologists who provide the infrastructure and governance required to support the business and operating models. Success will be a two-way collaboration: business users will need to bring technology teams closer to the value of their work and vice versa in order to create a common language and understanding in order to truly unlock of the potential of AI.

[1] Technology Review

INTRODUCTION

2025: A TURNING POINT

The turn of a new quarter century inherently creates an inflection point for reflection and prediction, a sentiment intensified by the extraordinary levels of political upheaval in the months leading up to, and already since, January 1st, 2025[1]. What is undisputable is that technology plays a central role in the macro and micro effects in ongoing social development. According to the World Economic Forum's Future of Jobs 2025 Report[2], 'Broadening Digital Access' is poised to be the dominant driver of business transformation [fig i], with AI far outweighing other technologies as the most influential of the developments [fig ii].

Macrotrends driving business transformation
% of employers surveyed

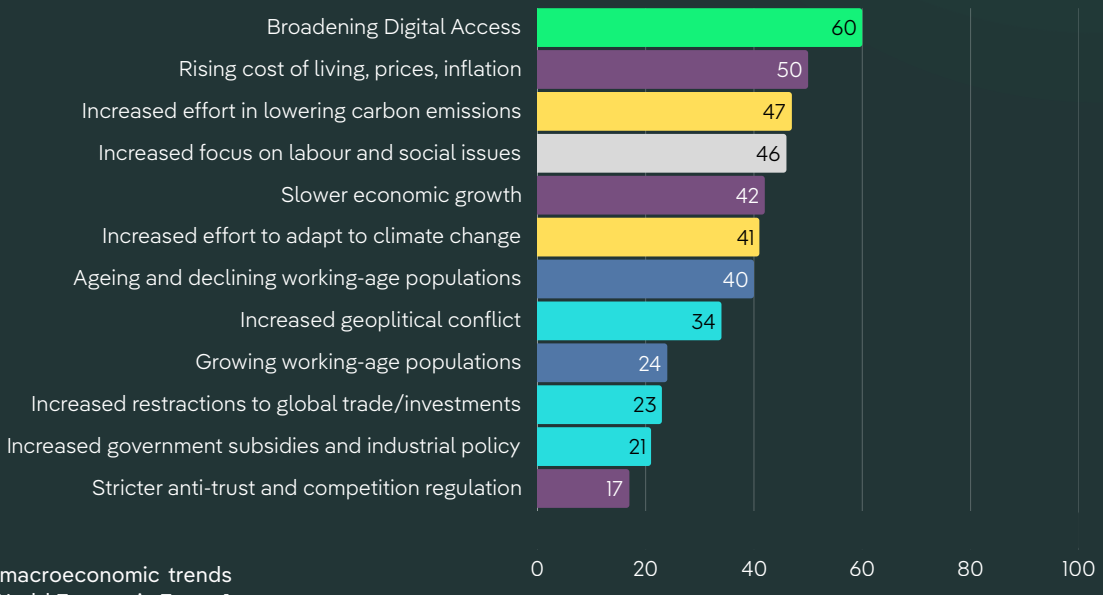
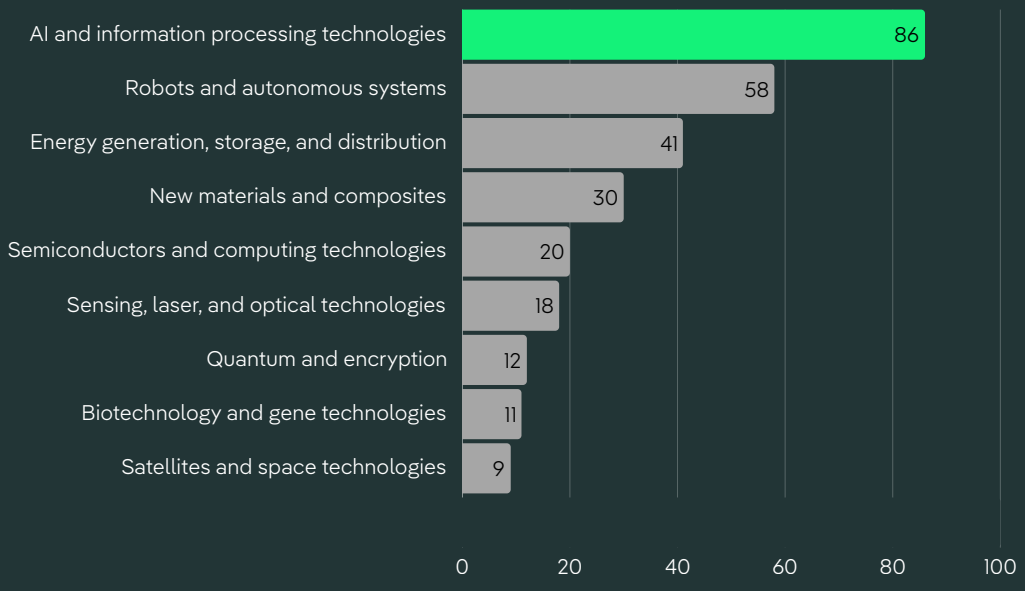


Figure i: The anticipated influence of macroeconomic trends on business transformation [Source: World Economic Forum]



Technology trends driving business transformation 2025-2030
% of employers surveyed

Figure ii: The anticipated technology trends that will influence business transformation
[Source: World Economic Forum]

[2] Pew Research Center
[3] World Economic Forum

Digital technology has long been the subject of future-facing speculation, as showcased by the BBC in their 1995 program 'Tomorrow's World', in which they attempted to predict what kind of technology would be an everyday feature in 2025[4]. At that time, it seemed that technologies listed further down in Figure ii, like robots, lasers, and biotechnologies, would have more of an impact. However, it is perhaps not what technologies that have developed to maturity quickest but how we interact with them. The rise of AI is inextricably founded in the universal adoption of the internet and digitized information, whereby we have integrated technology into the fabric of business, culture, and government through augmenting our ways of thinking and operating. We might not interface with holograms or have chips implanted in our arms to do our banking, as we thought we would in 1995, but instead we have set on a course to create another version of Jevons paradox – this time creating greater demand for information and insight[5]. All signs point this way, as research from Oxford Economics and Cognizant estimates that 90% of jobs will be at least partly impacted by GenAI by 2032, with 52% experiencing notable impact by the technology[6].

Despite the near-certainty that the future will be AI-augmented, the current environment is fraught with challenges – namely, financial. According to the Gartner Hype Cycle, GenAI has begun its descent into the Trough of Disillusionment (see fig iii)[7], a judgement based on soaring investment last year at the Peak of Inflated Expectations, which now puts it at risk of Executives writing it off as a fad. Indeed, in March 2024, 75% of companies surveyed by Gartner increased spend in technology, and particularly in AI. Yet, by February 2025, Gartner reported that[8]:

- 81% of boards have not made progress toward or achieved their digital business transformation goals.
- 70% of digital leaders have not significantly advanced toward digital transformation goals.
- 67% of CFOs believe the last three years' digital spending has not met enterprise expectations.

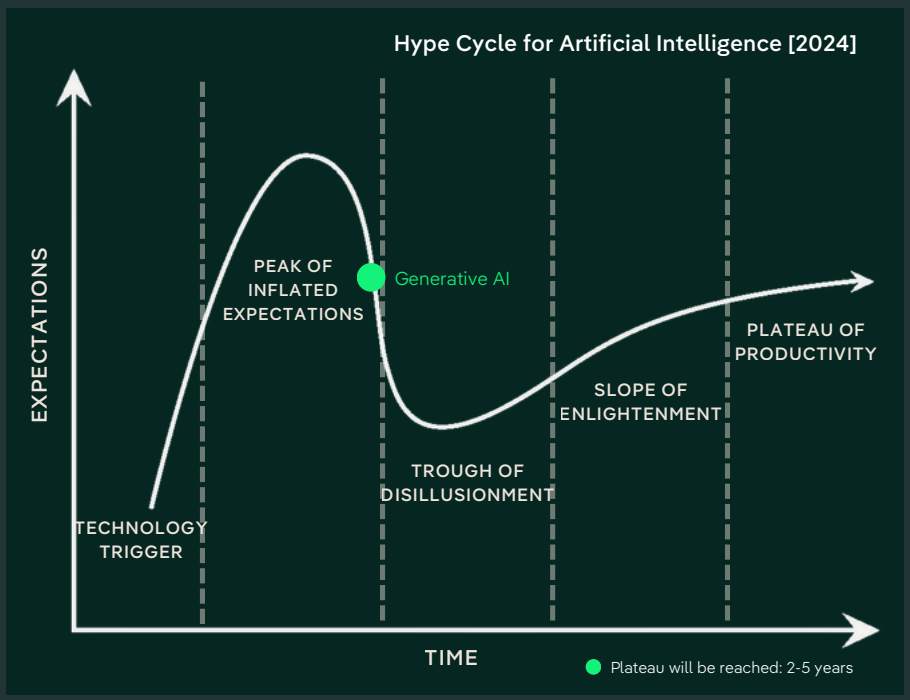


Figure iii: GenAI on the AI Hype Cycle [Source: Gartner®]

As the internal and external pressures to experiment and adopt AI grow, the challenge therein lies for data and AI leaders to take control of the narrative, repositioning their functions not as a sunk cost agency but as a producer of tools and solutions that drive efficient operations, open up new revenue streams, and ultimately realise business value. To do so means leading and working with the enterprise to reimagining their own roles within the business, as well as those of their end-users as the customers of their products and services.

[4] BBC
[5] NPR
[6] Cognizant
[7] Gartner
[8] Gartner

PART 1

A NEW KIND OF TECHNOLOGY CONSUMER

Data and AI tools are more ubiquitous, readily available, and delivered directly into the hands of individuals than ever before. The prevalence of GenAI in the news cycle, the app stores inside our pockets, and, increasingly, augmenting the software and systems we already use (like Microsoft Teams), makes it difficult to gatekeep. Individuals are already using it at a rate of 3x more than leaders estimate, according to McKinsey[9]. Simultaneously, almost half of C-Suite Execs believe their organization is developing GenAI tools too slowly, which they attribute nearly entirely to a talent skills gap and resourcing constraints (fig iv). In this experimental phase, there is a clear desire to unlock first-mover advantage. However, the exact areas of greatest impact are still being determined; again, nearly half of the C-Suite respondents had only partially, minimally, or not even begun identifying GenAI use cases that can demonstrate how they drive revenue or reduce cost.

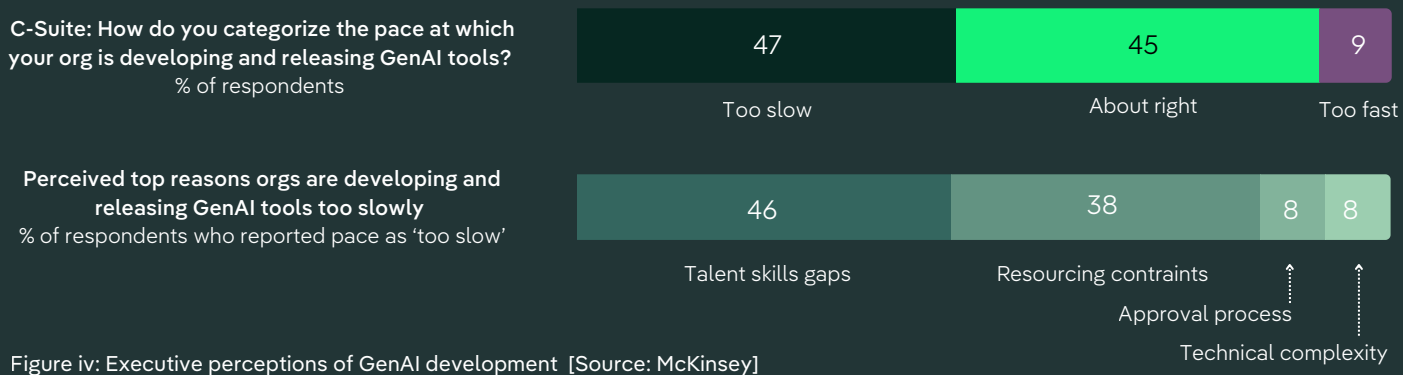


Figure iv: Executive perceptions of GenAI development [Source: McKinsey]

The implementation of GenAI is not a binary mode of adding value. Cognizant's recent research, 'New minds, new markets'[10], examines how AI is changing the customer purchasing journey, considering how different demographics are comfortable with using AI to augment their sales experience across the three key stages: **Learn, Buy, Use**

- Consumers are most comfortable at the 'Learn' stage, harnessing AI to expedite searching through the ever-expanding body of products and services available to us through digital retail, helping to mitigate against the paradox of choice and empowering decision-making with insight.
- Meanwhile, the average consumer across demographics reports to be least comfortable using AI in the 'Buy' stage, as individuals feel hesitant about the risks, accuracy, and capability of AI to actualize the selection and payment for good or services.
- The 'Use' phase has a middling comfort level, customers have a mixed reaction to the use of AI in enhancing value from products they had already purchased.

Cognizant's findings on customer behaviours are reflective of a general social psychology surrounding AI, which can be employed as a framework for use case identification, valuation, and selection which treats business users as end customers. Kubrick GenAI specialists have explored this theory through their ongoing Proof-of-Concept (POC) and Minimal Viable Product (MVP) development, beginning with a pro bono project conducted in conjunction with Women in Data® and University College London. The test case was co-created with Professor Coziana Ciurtin, a leading researcher specialized in rheumatology whose work seeks to understand the highly disproportion rate at which many autoimmune conditions affect women, particularly Systemic Lupus Erythematosus (SLE), of which 90% of patients are female.

[9] McKinsey [10] Cognizant

In her research, Professor Ciurtin had developed a hypothesis that research conducted using Machine Learning (ML) techniques for analysis of patient data did not adequately acknowledge and address potential biases. Given the notable female bias in the prevalence of SLE, any biases in ML techniques and data used pose a significant threat to effective research and treatment by further exacerbating the disparity.

The use case began as a hypothesis on the viability of generative AI to score research papers against specific criteria for a systematic review, in this case on the acknowledgement of remediation of potential bias in their data handling and ML techniques. To help mitigate against exacerbation of sex bias in the GenAI tool itself, Kubrick's team purposefully designed the model to be more stringent than generous when assigning scores on how well a paper addressed and mediated against bias[11]. The POC, delivered in just three weeks, showed promising results for the embryonic design with an accuracy of 50-70% for scoring against a human assessor, with the in-built stringency designed to counteract the subjectivity of human assessment.

After the delivery of the POC, it became clear that the tool could have a far more impactful use when positioned as a tool for hypothesis testing in areas of niche or novel study, rather than trying to replace the manual review process itself, especially given the high levels of governance and domain knowledge required to conduct systematic reviews in the life sciences. The tool could score a paper against all criteria in under a minute, so when extrapolated across hundreds of papers, it enabled a full-scale initial review in just a day, compared to the many weeks it can take for a junior researcher to conduct the same process. That is to say, it could augment the 'Learn' stage of the research lifecycle, when put into customer terms, providing researchers with a preliminary sense check as to whether their new area of research could yield any results, before investing often limited resource into undertaking the assessment. By expediting the 'Learn' stage of research, the tool will not only enable significant efficiency gains and savings, while instilling trust in the human to undertake the 'Buy' stage (i.e., conduct the stringent assessment), but also enable researchers to cast a wider net across their research with the confidence to explore otherwise overlooked or underrepresented areas, helping overcome disparity in women's health and other systemic issues in life sciences and elsewhere.

Similarly in the Life Sciences field, GenAI is showing great promise for improving outcomes in the 'Use' phase of the customer journey. At a global Pharmaceuticals organization, Kubrick is developing a chatbot for the R&D team to expedite the retrieval of key information from Standard Operating Procedures (see fig v), which come from disparate sources and are difficult to collate. The team are developing their MVP with an accuracy that currently exceeds 85%, which is projected to save each user up to a month a year, augmenting the daily lives of business-critical researchers to enable them to move up the value chain as they enhance their activities at the 'Use' stage of a GenAI tool. Moreover, when extrapolated across 100+ users, the tool has the potential accelerate the drug trialling process across product lines by years, as well as create a governable standardization of SOP retrievals that can dramatically reduce the risk of regulatory fines.

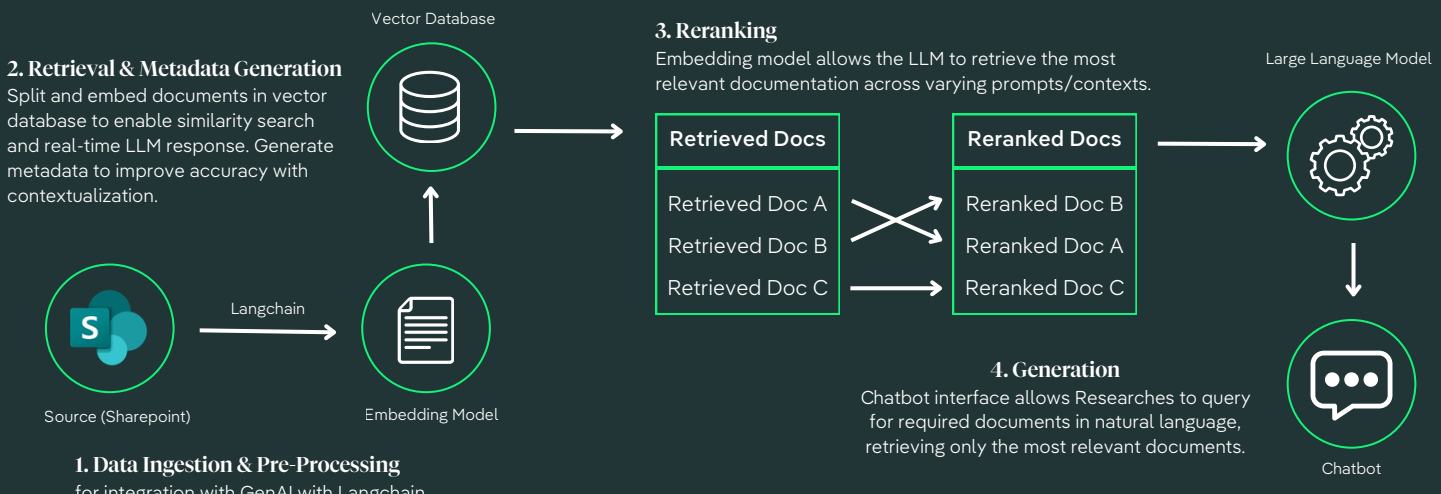


Figure v: High-level architecture of chatbot [Source: Kubrick]

[11] See Kubrick's report on the initial POC and MVP development for model design

PART 2

A NEW KIND OF TECHNOLOGY CREATOR

With clear appetite from consumers to augment certain stages of the purchase lifecycle with AI, the pressure is on for enterprise data and AI teams to deliver products that their internal 'customers' will adopt. Yet, research shows as many as 90% of GenAI POCs are failing to move to MVP stage, let alone production[12] - and not due to the technical capability. "Too often, data and AI teams are found developing products from inside the antiquated silo of the IT Function", reflected Jess Macleod, a Kubrick Delivery Lead specialized in GenAI implementation. "This separation, created by a longstanding cultural divide, makes it difficult to identify and evaluate the use cases that will have the greatest impact and, ultimately, secure buy-in for further development."

While reframing business end users inside your organisation as 'customers' of your product, data and AI teams are not just the technology creators but also the marketing and sales strategists, who develop products with the end customer and their problems in mind.

"We must shift our approach", Macleod continued, "and work more closely with business users to go beyond traditional requirements gathering practices. Our success hinges on our understanding of the business processes which are mature, measurable, and impactful so that we can benchmark and track value from the start."

You can hear more from Jess on the webinar "Beat the GenAI Odds: the 10% of POCs that succeed – and why" here.

When reframing AI product creation against the customer purchasing cycle, it is critical to recognize that the customer journey doesn't end with the transaction – so neither should the release of the product. Afterall, value from a technology can only be realized with use, no matter how technically savvy or robustly designed it is. Data and AI teams also need to be the customer success team that drive adoption through the 'Use' phase[13], or else increase the risk of losing the investment in data and AI that the C-Suite have been driving, without yet seeing return[14].

In one major Insurer, Kubrick Senior Associate Ailís Dale has been working to drive the adoption of products into business lines by providing the oversight and communication loop between technology teams, end users, and the strategic objectives of the C-Suite. As Scrum of Scrums Master for a collection of four squads working across business lines, Dale is focused on one primary objective: ensuring the products they deliver demonstrate value. "The challenges I'm seeing with my current client are not unique to them, but a systemic issue that spans data and technology teams working in the Agile methodology", Dale reflected. "I'd venture to say very few businesses run the full Agile process."

[12] CIO Magazine
[13] Ibid 10
[14] Ibid 8

To Dale, the crux of the problem is an incomplete product lifecycle: data teams are set up and incentivized to focus on the first four phases, Discover, Validate, Develop, and Deploy (see fig vi), considering the delivery of their product to be their ultimate goal. Due to a variety of factors, such as capacity, demand, and misalignment of strategic objectives, many teams do not take on the mantle of Monitoring and Improvement or Retirement of obsolete products. In doing so, they fall into a limbo state, whereby they measure themselves against performance standards that do not match the needs of their users; In agile, data teams push themselves to deliver features against standards of functionality, timeliness, frequency – but the business wants to see the impact of these features.

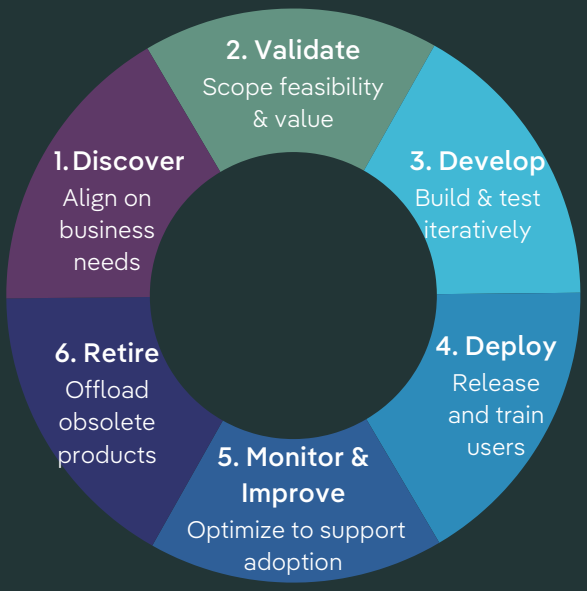


Figure vi: The Data Product Delivery Lifecycle. [Source: Kubrick]

"We have been so influenced by the breakneck speed of innovation, with a 'fail fast' mindset that comes from the Big Tech players who are leading the charge – but that approach should not trickle down into enterprise implementation", Dale explained. "To that, I say: let's learn fast, not fail fast. Cycling through feature delivery and discarding products as 'failures' rather than taking the time to monitor, improve, and drive adoption makes it difficult for data teams to demonstrate the value they bring to the business and, ultimately, puts them at risk of being cited as an investment without return."

To help address this growing challenge across their client base, Kubrick has developed a new approach to Value Engineering. Led by Solution Lead Deepak Chandarana, the framework aligns against the 6 phases of the product lifecycle, creating a methodology of product design and delivery that priorities value realization from inception to adoption, going beyond traditional requirements gathering practices (see fig vii).

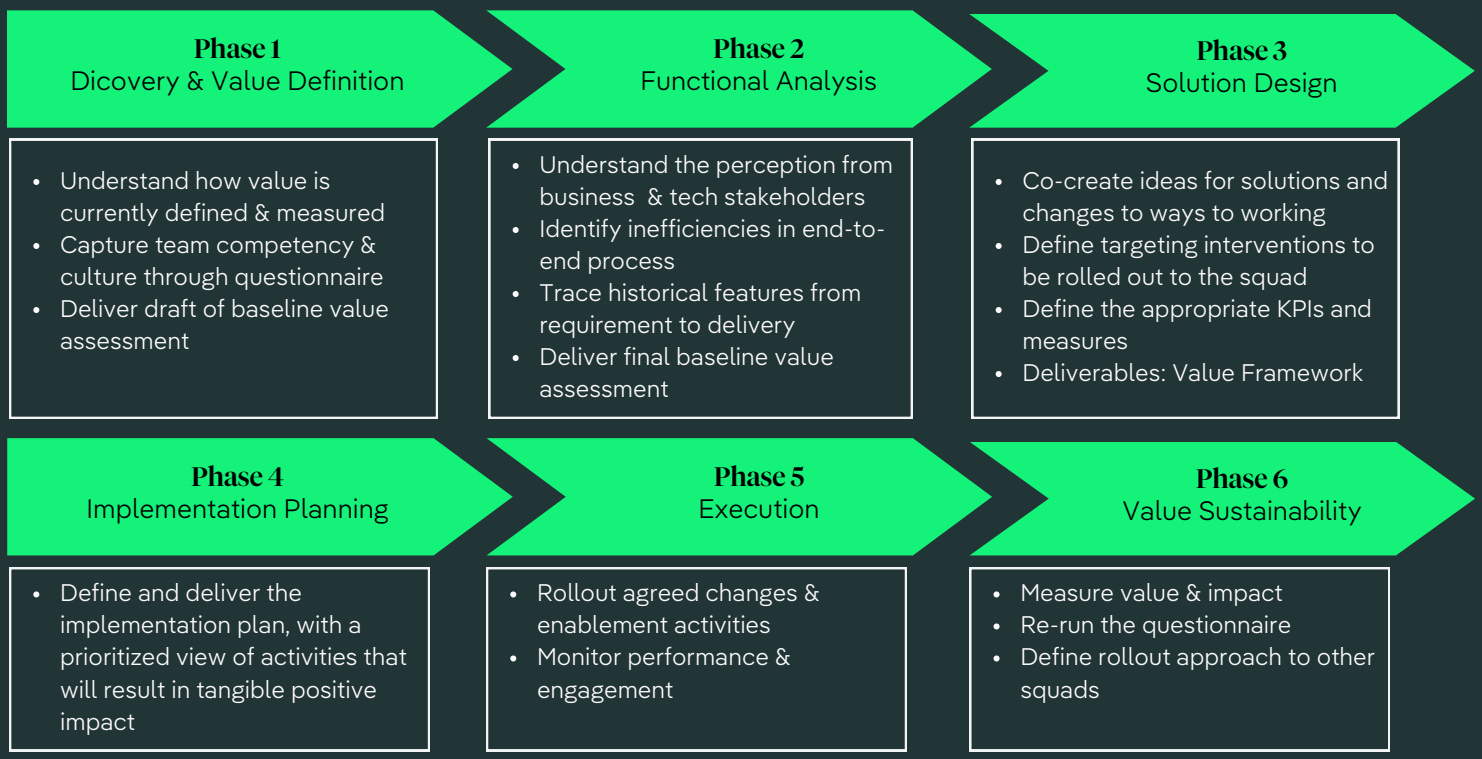


Figure vii: Value Engineering Framework [Source: Kubrick]

PART 3

A NEW KIND OF COLLABORATION BETWEEN THE BUSINESS AND TECH

The appetite for AI adoption may be growing, particularly as consumers look to augment their information-gathering and decision-making (as demonstrated in the 'Learn' and 'Use' stages of the customer journey[15]), both in their everyday lives and inside their organizations. Yet, there is a paradox to the sensationalism of AI: the more people know about the technology, the less they understand it – but the more they want AI solutions, nonetheless. The challenge this poses for successful AI adoption within the enterprise will only heighten as technologies grow more complex.

Unlocking the full potential of AI cannot only be driven by consumer needs or by the go-to-market efforts of its creators. These two equal and opposite forces of product development and adoption must have common goals and a common language in order to understand each other. In the face of this challenge, Gartner predicts that over half of CDAOs will secure funding for data and AI literacy programs by 2027[16], stressing the importance of Executives to acquire a base-level awareness of their data and AI assets, governance, and architecture in order to truly understand the value it can drive (see fig viii).

Figure viii: AI Literacy requirements across personas [Source: Gartner]

Julia Pattie, a Kubrick GenAI SME who has worked across a variety of industries to design and implement AI solutions, shared her insights on the importance of cultivating data and AI fluency in practice. "The quickest route to shelving a POC is a lack of business buy-in, yet we see this happening time and time again.", she said. "If cultivating end user adoption only begins at the 'Deploy' stage of the product lifecycle[17], it may be too late; there will be a long, up-hill battle to prove the value of your tool to existing processes and roles. We need to bring our end users on the journey from its inception, which means bringing them inside the technology to show them the bounds of the possible."

"At first, this may feel like it is slowing the process and causing frictions which counter the usual pace of agile product development", Pattie continued. "However, when you give your stakeholders the time

[15] Ibid 10
[16] Gartner
[17] See fig vi

and support to build their understanding of the data and platforms at their disposal, you will dramatically increase their proficiency at providing requirements and feedback, as well as better manage their expectations for how the technology can augment their work – not to mention drive adoption upon delivery. I've just returned from a week-long workshop in Singapore, where direct interaction with end users has allowed us to enrich our product roadmap with a shared vision, securing the sponsorship to expand our product range from one tool to a suite of eight, as well as accelerate our MVP into production."

Kubrick has been increasing its Advisory capability to address the need for advanced data and AI literacy. Gathering the collective experience and expertise of their onsite Delivery consultants and their inhouse Principal consultants, they are creating an interactive workshop designed to kickstart the journey to AI fluency for business leaders: 'Data & AI for Decision Makers'. The seminar provides a forum for Executives to open up the black box of the data and AI lifecycle, including its governance, pitfalls, and promises, so as to better understand how to become better users, advocates, and sponsors that use their influence – and budget – to drive adoption.

The half-day workshop, which is customizable in content to align with the maturity and challenges of the client, includes:

- **Context Setting:**
  How – and why – AI is changing enterprise operations, risks & rewards, and the opportunity of early adoption.
- **AI Enablement through People, Process, and Technology:**
  Data & AI Fluency, being an Agent of Governance, inside the Modern Data Cloud Platform, and collective AI-Readiness.
- **GenAI Fundamentals:**
  Understanding the 'psychology' of LLMs, and their development, training, and alignment to enterprise use cases.
- **The Data & AI Product Mindset:**
  Effective product discovery, implementation, and scaling, enabled by business user input to the agile lifecycle.
- **Realizing Value from AI:**
  The framework for discovering, measuring, and proving strategic value that drives top-line impact.

"The advent of GenAI will and should transform the concept of data literacy", said Dan Tomlinson, who leads Kubrick's advanced delivery capability and has helped spearhead the initiative. "Previously, the requirements were simple: understand the fundamentals of data governance to enable responsible accessibility of data assets and analytics. Now, we need Executives to take up the mantle of owning the implementation of AI across the enterprise, which can only be successful when they have the right language, frameworks, and knowledge to remove the institutional barriers that currently stand in the way."

Data & AI for Decision Makers

Learn more about Kubrick's workshop offering and how we can tailor it to your data and AI communication challenges: speaktous@kubrickgroup.com

CONCLUDING THOUGHTS

The appetite for AI in consumers, both inside and outside the enterprise, is set to skyrocket; as a society, we need the capability of GenAI to tackle the exponential volume and information we generate and disseminate, while we narrow our focus to the most valuable insights we require. This will be a powerful antidote to the age of digitization we have created.

Building the capability for tech teams and the business to collaborate is essential; the sooner businesses cultivate the culture, language, and common goals to do so, the sooner they will deliver meaningful value for the enterprise. These businesses still have the chance to gain first-mover advantage in the GenAI race.

At its core, the issue is perhaps simple: tech teams talk tech; business teams talk business. Our data and AI leaders need to demystify tech while better understanding our stakeholders and what is (and could be) driving value for them. The first step is to build a bridge between them – what will unfold is a fundamental shift in organizational operations that fold business and technology domains together.

This means acknowledging and evolving the positioning of data and technology teams inside the business, from support functions that kept the business afloat to drivers of revenue, competitive operational excellence, and business model transformation. The CDOs, CTOs and CIOs who achieve this common understanding will inherently move themselves and their teams up the enterprise value chain. Creating and owning the dialogue between technology teams and their business counterparts will help establish data and AI leaders as the drivers of strategic change.

ABOUT KUBRICK

Kubrick exists to transform lives through data & AI. We help global organizations realize lasting value from data and AI with a workforce we build ourselves.

We deliver data and AI solutions that minimize operational cost, strengthen resilience against risk, and uncover revenue opportunity. Our clirents can retain our people to drive lasting adoption while futureproofing their workforce with exceptional talent.

Since 2016, we've created over 3,000 data & AI specialists by removing the systemic barriers to the tech industry. We find incredible minds from all backgrounds to train with us, creating a diverse team of experts. We're the preferred partner of today's leading technology providers, including Databricks, Snowflake, and Collibra, to accelerate delivery and co-create revolutionary solutions.

To learn more about our data and AI solutions and talent programs, get in touch: speaktous@kubrickgroup.com

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