KPMG

Quantifying the GenAI opportunity

Lessons learned from benchmarking **17 million+** companies worldwide

March 2025

Two years into the generative AI era, companies face a pivotal moment—transitioning from piloting into scaling AI companywide—with pressure mounting to quantify potential returns and justify the spend.

Executives remain willing to invest in generative AI (GenAI) to gain productivity and a competitive edge, but they struggle to quantify expected returns and set realistic targets within their business to help shape strategy, guide investments, and target their spend.

To help our clients accelerate their AI transformations, KPMG spent 18 months analyzing more than 3 billion data points for 17 million+ companies. We quantified the value at stake from fully deploying and adopting GenAI for each company, using our patent-pending GenAI value assessment model and the best available external benchmarks and third-party data.

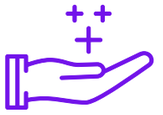
We examined more than 7,000 public companies in more detail financially; shared the results with over 500 client executives for feedback; engaged with 50 clients to refine our estimates with their internal proprietary organizational data; and are now helping many capture this value.

The results are encouraging. The addressable opportunity equates to 4-18% of EBITDA annually in labor productivity alone, depending on sector. Our model also helps identify where to focus and what targets to set by function, workflow, and key roles.

However, caution is advised. Benchmarks aren't perfect and there are challenges to overcome on the path to value, including adoption, data, and trust. So far, no company has adopted GenAI broadly and long enough to measure its full potential over time.

For most businesses, this offers ample rationale to pursue GenAI transformation with determination today. And with agentic AI on the way, the full potential may well increase, or at least be easier to capture. Delaying change could put companies at risk.

Key findings



The GenAI opportunity is significant: up to 4-18% of EBITDA and 19-23% of salaries across sectors annually. Of this, 48% comes from low/medium complexity tasks that are easier to augment, while 52% comes from high complexity tasks requiring tailored solutions, agents, and more complex change management across multiple roles.*

Opportunity varies by sector and function, with highest EBITDA improvement potential expected in the Professional Services,† Technology, Media and Telecommunications, and Healthcare and Life Sciences sectors, as well as the Sales and Front Office‡, IT, and Supply Chain functions.

Value capture requires behavioral change at scale, with a people-centric approach that ensures broad adoption of GenAI tools, productive reinvestment of freed-up capacity, and evolving workflows to embed AI over time. The road to value goes through three phases of maturity.

Source: 77,074 Public companies segmented by NAICS industry codes

*Low-complexity tasks may be effectively augmented by providing knowledge workers access to readily available GenAI tools "out-of-the-box" with little/no tailoring. Medium-complexity tasks may necessitate the development of tailored solutions and access to the most critical proprietary data. High-complexity tasks will likely require both integrated and sophisticated solutions, including agents, comprehensive governance, data, and change management across multiple roles.

†Professional Services includes Professional, Scientific, Technical, and Other Services (except Public Administration)

‡Front Office (excluding Sales and Marketing) includes roles and functions such as administration, medical professionals, client-facing bankers, and other customer-facing positions / functions.

A new inflection point for GenAI

Despite rising media skepticism, recent surveys confirm that business leaders remain confident in GenAI's strategic and operational value and intend to make sizeable investments this year to scale it across their companies.

Half of companies have now moved past initial experimentation to focus on companywide implementation; however, only a third expect to see measurable ROI in 6 months.

Without data to quantify the opportunity for the next phase, many AI leaders struggle to prioritize initiatives, set realistic targets, and make the business case to their appropriately skeptical CFOs to release (or increase) the spend, even if budgets have been created.

Therefore, being able to quantify GenAI value at stake is rapidly becoming a strategic priority to help set the right pace for change, shape transformation programs, and carefully deploy the investment dollars set aside to get there.

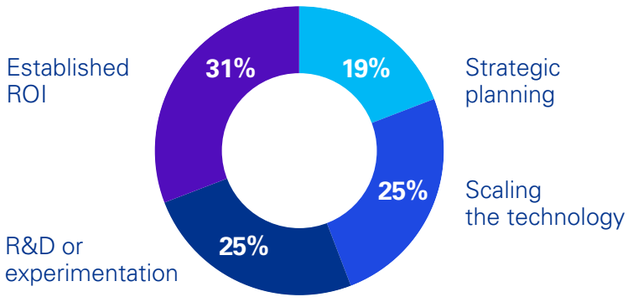
Investments continue, but ROI lags:

91% of leaders believe AI will help their organization run a better business in the next 2 years.

68% of executives intend to invest between $50 and $250 million in GenAI over the next 12 months.

50% of companies are scaling GenAI but have not yet established ROI; 31% expect to do so in 6 months.

How companies envision the next phase of their GenAI journey in 6 months:



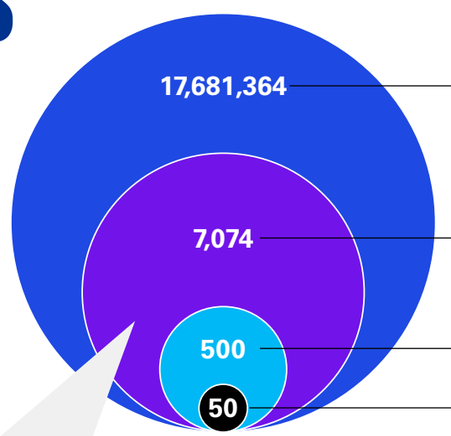
Source: KPMG LLP, AI Q4 2024 Pulse Survey (January 9, 2025)

Over 3 billion data points

In the last 18 months, KPMG applied our patent-pending GenAI value assessment model to more than 17 million companies that collectively employ 539 million people across the world, earning nearly $30 trillion in estimated annual salaries.

For the 7,000+ companies with 72 million employees, we collected publicly available financials to assess the value potential of GenAI in relation to EBITDA. These organizations span more than 20 industries and generate $53 trillion in annual revenue, with a company average of $7.5 billion.

Company sample



For all companies, the full value potential was graded in terms of complexity to capture from "low" (requiring access to readily available GenAI tools) to "high" (requiring integrated solutions and workflow change management).

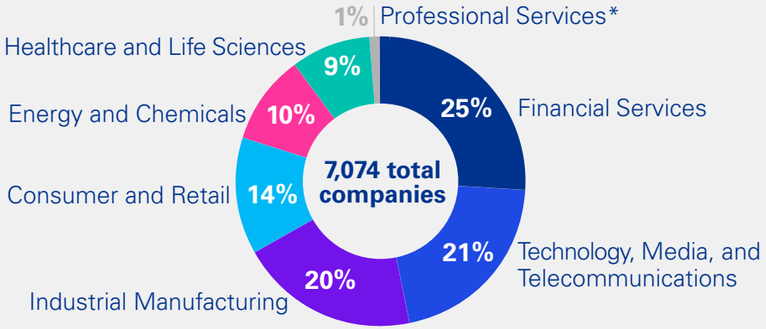
17M+ companies assessed by categorizing employees into 2,000 roles, estimating time spent on 18,000 tasks, and applying total GenAI time-savings percentages to their local salary costs (3 billion+ data points).

7K+ public companies analyzed in more detail, through collection of publicly available financial data to quantify GenAI value potential in relation to the most recently reported company EBITDA.

Unique company results discussed with 500 senior executives on topics including benchmarking versus peers, people/technology readiness, and suggested use cases to deploy.

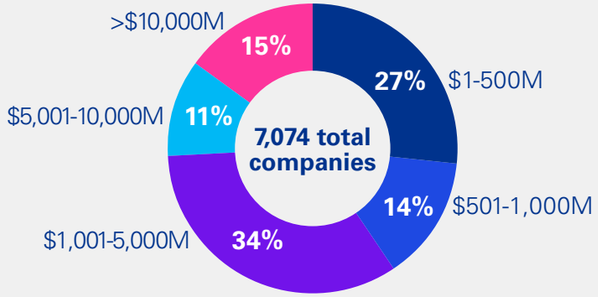
50 client estimates refined, leveraging their proprietary organizational data, to begin value capture.

% of companies by sector

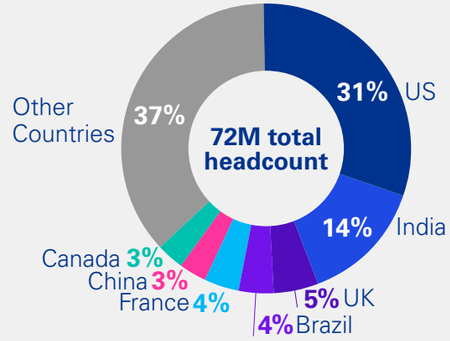


% of companies by revenue size

Average revenue: $7.4B; Median revenue: $1.5B



% of headcount by country



Total percentages may not add up to 100% due to rounding.
*Professional Services includes Professional, Scientific, and Technical, and Other Services (except Public Administration)

How our model works

Over the last 18 months, KPMG has applied our patent-pending GenAI value assessment model to more than 17 million companies across the world.

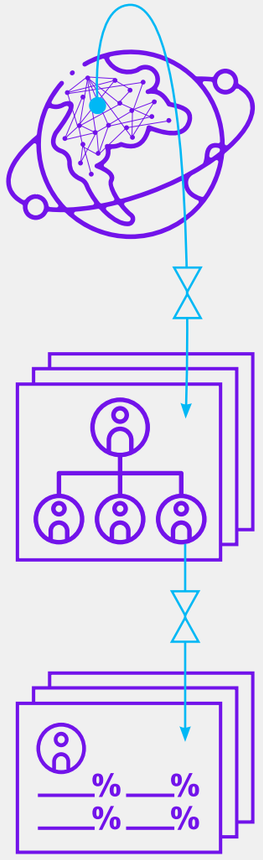
We start by building a "digital twin" of each company using third-party data for employment and job titles, mapping all employees to one of 2,000 standardized roles, and aligning each role to a function within the company. For each role, we estimate time spent by task prior to GenAI and apply a time savings for each, using leading data sources like ONET and WEF for 18,000 tasks. We then use AI to grade each task by complexity as an indicator of the value capture challenge.

Subsequently, the model calculates the dollar value of time potentially freed-up, using salary benchmarks (not fully loaded cost) for each role, location, sector, and function. This is then compared to the salary cost and EBITDA if available. Our methodology does not stipulate how freed-up time will be reinvested but assumes it can be redirected to tasks with equal or greater company value.

We believe this user-centric, bottom-up approach is superior for estimating the total addressable opportunity for GenAI, versus approaches that focus on picking use cases and summing up their potential. The latter risks underestimating the full opportunity—as many use cases have yet to be identified—and may also ignore potential cannibalization between adjacent use cases.

Our model is technology agnostic, but we assume that low/medium-complexity tasks can be augmented effectively with currently available GenAI technology, such as large language models (LLMs), copilots and GenAI embedded into enterprise software. Agentic AI promises to accelerate the pace of value capture for high-complexity tasks and may also expand the total addressable opportunity for GenAI over time.

How we estimate the GenAI opportunity value:



Leverage our database of more than 17 million companies across the world.

Map employees to one of 2,000 standardized roles using third-party data.

Build "digital twin" of the organization by aligning each role by function.

Break down each standardized role into tasks and time spent prior to GenAI.

Identify the GenAI time savings opportunity and complexity per task.

Sum up time saved by role, and multiply with salary benchmark for each location.

A conservative approach to opportunity sizing

We quantify productivity gains by estimating freed-up time for knowledge workers using GenAI tools for different tasks, multiplied by their salary, assuming all time is reinvested into equally productive tasks. Conservatively, this excludes potential upside of time reinvested into more productive tasks, second-order benefits (e.g., employee satisfaction, retention, and improved decision-making), and other types of AI/digital automation.

Figure 1: Sizing the annual opportunity across the 7K+ and 17M+ company samples

GenAI augmentation opportunity

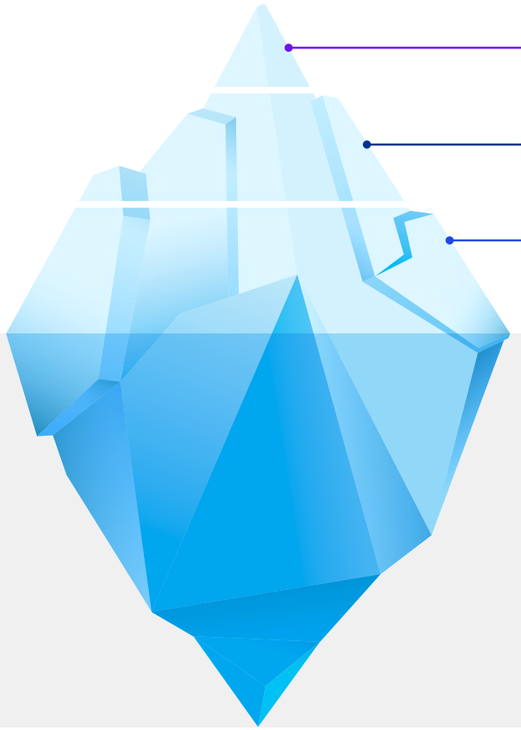
$1.0T for 7K+ companies

$5.9T for 17M+ companies

Other AI/digital automation opportunity

$1.5T for 7K+ companies

$9.1T for 17M+ companies



9% Low complexity

39% Medium complexity

52% High complexity

Our analysis focuses on:

Simple tasks that can be effectively augmented using readily available GenAI tools (e.g., LLMs and copilots) with little/no dependence on other roles.

Tasks that may require more integrated and customized solutions (e.g., accessing proprietary data and undertaking more change management to be effective; data-piping/enrichment).

Tasks that will likely require more integrated, sophisticated, and tailored solutions (e.g., agents, comprehensive process redesign, and change management).

Out of scope for this report:

Tasks best automated by AI/digital technologies other than GenAI (e.g., machine learning and robotic process automation).

Value that can be captured without GenAI but is more likely to be accelerated as part of a GenAI-triggered transformation.

Note: In the design of an AI transformation program, both GenAI and non-GenAI opportunities should be included for consideration.

The size of the GenAI opportunity can be substantial

The average annual GenAI opportunity for the 7,074 companies we analyzed is up to $136M. Of this, $12M is considered low complexity, $55M medium complexity, and $69M high complexity to capture.

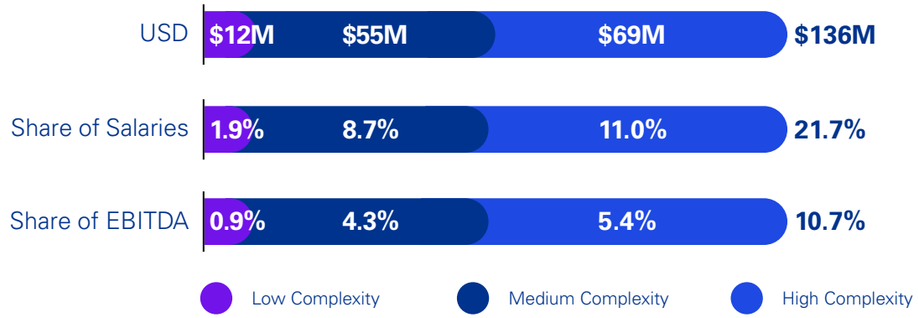
This average GenAI opportunity represents 21.7% of salary costs and 10.7% of EBITDA annually, if the full potential can be captured. Focusing only on the most likely opportunities—those with low to medium complexity—could still improve EBITDA by 5.2 percentage points (Figure 2).

The total addressable opportunity varies significantly across sectors, ranging from 4% to 18% of EBITDA and 19% to 23% of salaries (Figure 3). Additionally, the potential differs by function within each sector (Figure 4).

The eventual impact on a company's financial performance depends on both the amount of time that can be freed up and how effectively it is reinvested. This could include increasing output without adding costs (gradually expanding margins), conducting more sales calls (boosting revenue), or enhancing call-center capacity (improving customer satisfaction and reducing churn). Simply reducing headcount is only a small portion of the full potential.

Deploying GenAI offers the potential to significantly improve labor productivity using new technology that was unavailable two years ago. Even if only partially realized, these improvements can be substantial in terms of absolute value, salary costs, and EBITDA.

Figure 2: The average annual GenAI opportunity for the 7,074 companies



Note: Figures have been rounded to the nearest tenth decimal place.

Key considerations and caveats in using these estimates:

- GenAI is still new; no company in our sample has yet fully adopted GenAI across their organization for long enough to prove actual value captured at scale.
- These estimates quantify the opportunity for what is possible to augment but do not take into account whether the augmentations would be profitable.
- Our models rely on third-party benchmarks from leading providers such as ONET and WEF; however, they may not be precise for a specific company.
- External data is less reliable than your own; employees may misrepresent roles on publicly available social media platforms, and their time spent in these roles can vary.
- Human behavior is unpredictable; freed-up time may not be reinvested in equally (or more) productive tasks and may create new, unforeseen time leakage.

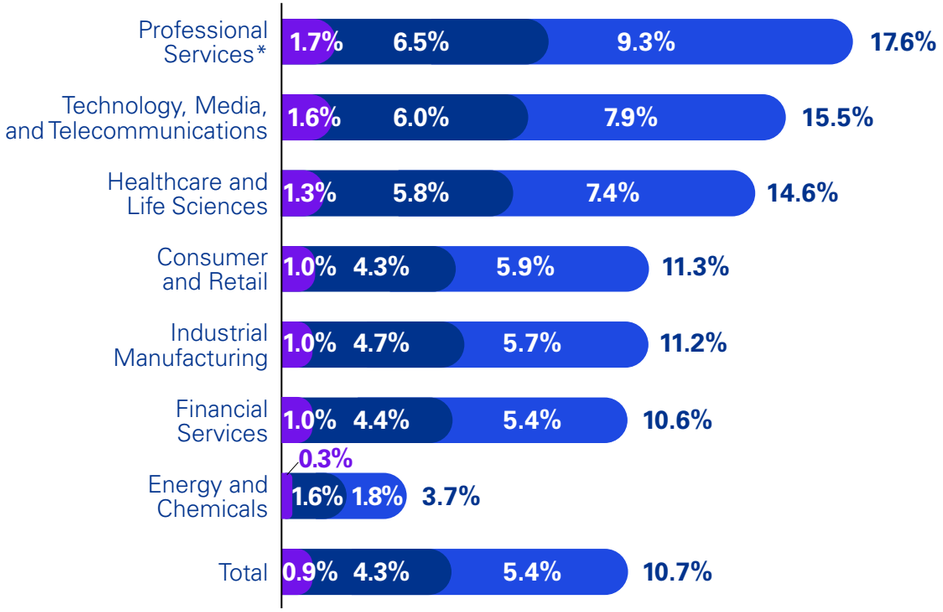
Hence, consider these estimates as indicative benchmarks to complement other sources of data, helping to prioritize areas of focus and shape transformation programs and AI strategies.

Figure 3: The estimated impact of GenAI across sectors

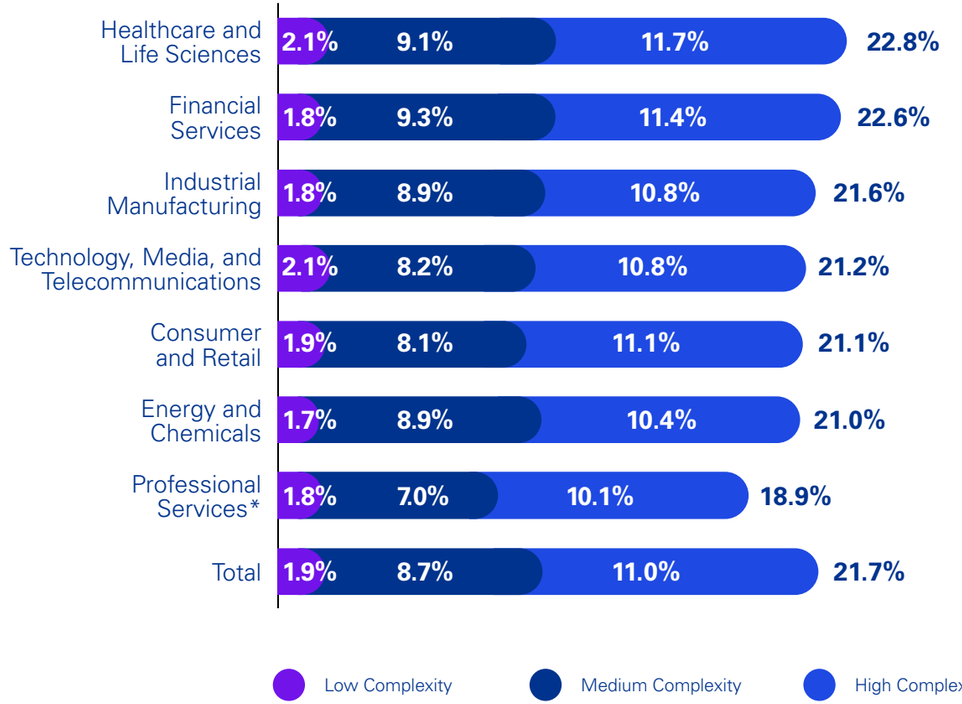
The GenAI opportunity equates to 4-18% of EBITDA and 19-23% of salary cost annually, across sectors.

Of the full potential, the low/medium complexity opportunity ranges from 1.9-8.2% of EBITDA, or 8.8-11.2% of salary cost.

GenAI opportunity as % of EBITDA



GenAI opportunity as % of salary cost

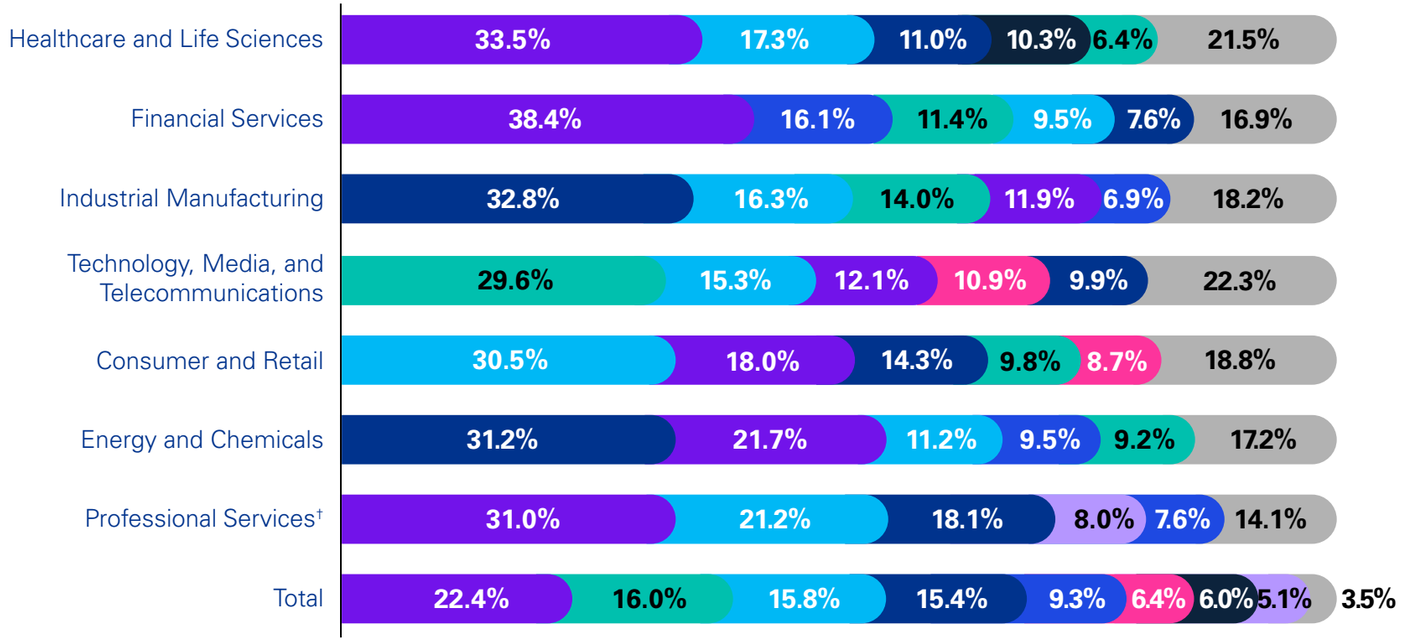


Source: 7,074 Public companies segmented by NAICS industry codes
Figures have been rounded to the nearest tenth decimal place.
*Professional Services includes Professional, Scientific, Technical, and Other Services (except Public Administration)

Figure 4: The functional impact of GenAI across sectors

On average, the Sales and Front Office*, IT, and Supply Chain functions exhibit the highest potential for GenAI value across all sectors.

In each sector, the top two functions contribute approximately 50% of the total potential GenAI value, and the top three functions combined account for over 65%. However, the mix of top functions varies by sector. For example, in Financial Services, the leading functions are Front Office, Finance and IT, whereas in the Industrial Manufacturing sector, Supply Chain, Sales and IT top the list.



Source: 7,074 Public companies segmented by NAICS industry codes

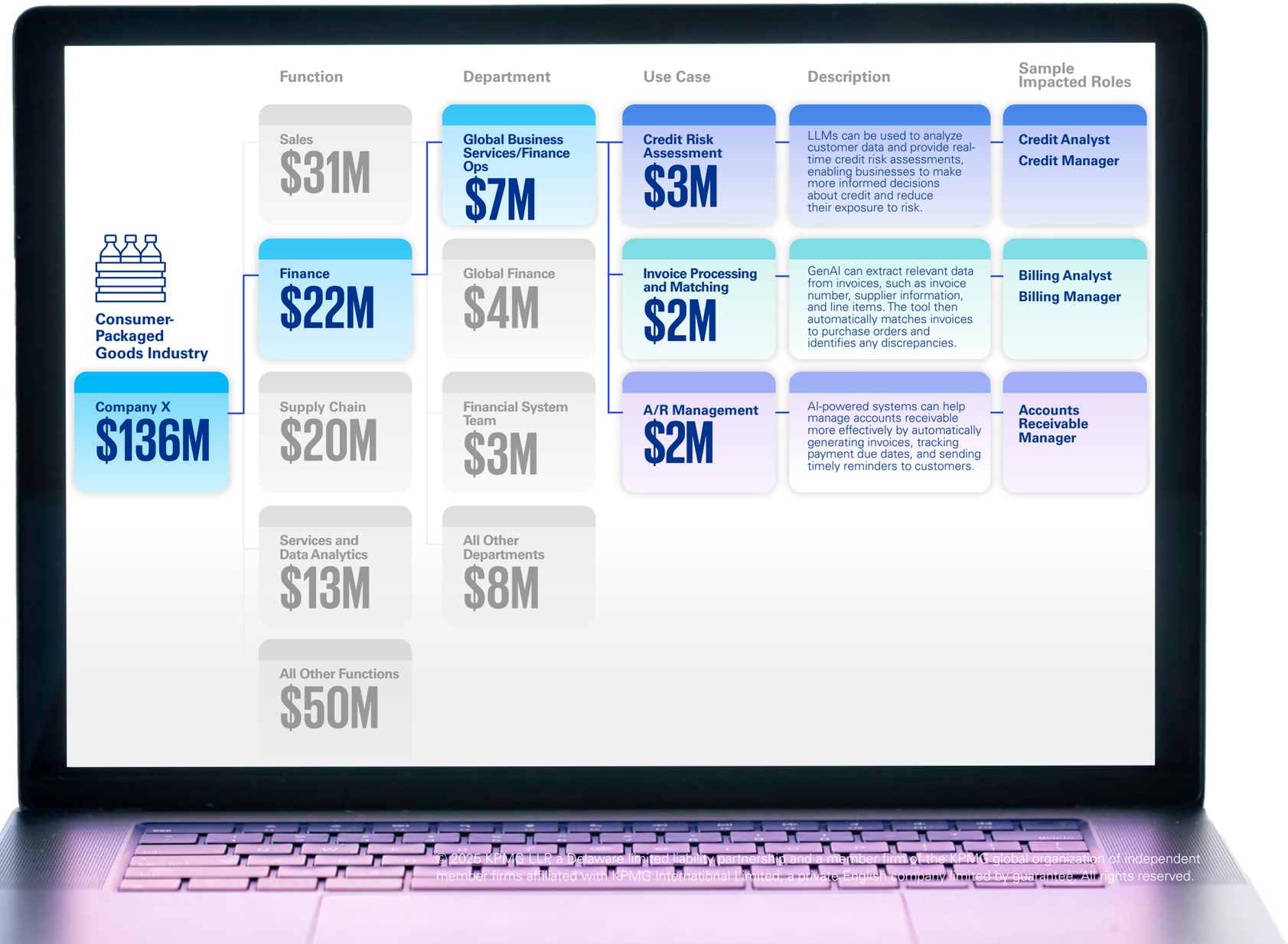
Percentages represent the GenAI value opportunity based on time savings per function. Total percentages may not add up to 100% due to rounding.

*Front Office (excluding Sales and Marketing) includes roles and functions such as administration, medical professionals, client-facing bankers, and other customer-facing positions / functions.

†Professional Services includes Professional, Scientific, Technical, and Other Services (except Public Administration)

For each company, we can break down opportunities by function and department, and recommend high-value use cases

Here we identify GenAI-driven workforce capacity value by function for an illustrative company in the Consumer-Packaged Goods industry.



Sample estimated GenAI impact by role

HR Manager, Tech industry

GenAI has the potential to transform an HR manager's role by freeing up time from tasks such as employee relations, training design, and data analysis. In the example below, GenAI can be utilized to free up an estimated 31% of the HR manager's time annually, enabling focus on more strategic work while acting as the "human in the loop" to help mitigate risk and ensure quality outputs.

Work tasks	Activities	Time spent prior	x GenAI time savings	=Time saved	Ease of capture
Employee relations	• Conduct exit interviews to identify reasons for employee attrition or termination • Study legislation, arbitration decisions, and collective-bargaining contracts to assess industry trends	**7%**	**42%**	**3%**	**3% Low**
	• Provide current and prospective employees with information about policies, job duties, working conditions, wages, promotion opportunities, and benefits	**4%**	**49%**	**2%**	**6% Medium**
Analysis	• Investigate and report on industrial accidents for insurance carriers • Prepare personnel forecasts to project employment needs	**6%**	**41%**	**2%**	
Recruiting	• Develop, administer, and evaluate applicant tests	**4%**	**42%**	**2%**	
Compensation and benefits	• Manage compensation, benefits, performance management systems, and safety programs, ensuring compliance and competitiveness, while overseeing special projects related to pay equity, day care, and awards	**10%**	**33%**	**3%**	**22% High**
Employee development	• Design development, language training, and health/safety programs; manage employee orientation • Oversee all personnel activities, incl. employment, compensation, labor relations, and employee relations	**19%**	**26%**	**5%**	
Employee relations	• Negotiate agreements, interpret contracts, handle difficult staffing, disciplinary procedures/terminations • Represent at personnel-related hearings and serve as a liaison between management and employees	**21%**	**42%**	**9%**	
Policy	• Advise managers on policies related to equal employment opportunity and sexual harassment, recommend necessary changes, and oversee the evaluation and classification of job positions	**8%**	**31%**	**2%**	
Staffing	• Allocate human resources, ensuring appropriate matches between personnel and roles/tasks • Identify staff vacancies and recruit, interview, and select applicants	**9%**	**34%**	**3%**	
Other		**12%**	**0%**	**0%**	
	Total	**100%**		**31%**	**Total time saved**

The 3 phases of value capture maturity

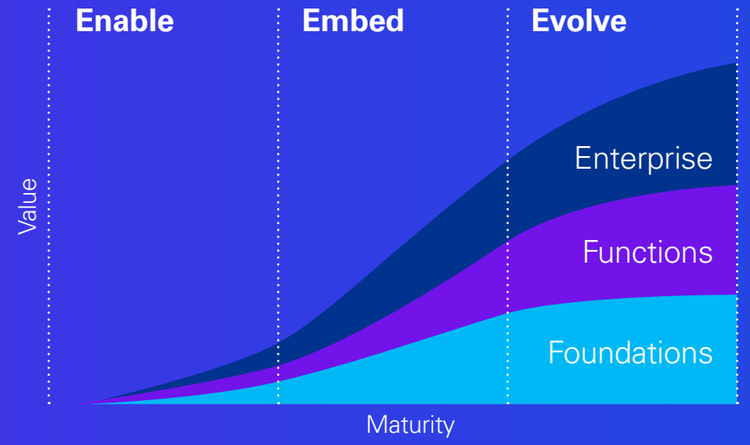
1,390
Decision-makers

To complement our quantitative modeling of GenAI opportunities, KPMG International conducted a robust research program on how to capture this value over time by sector. The research involved more than 1,390 decision-makers globally, a portfolio of specialists in industry and academia, and key learnings from more than 500 client AI engagements.

3x3x3
Phases, Layers, and Barriers

While there are differences across sectors and companies in the sample, three main findings emerged:

1. The road to value capture goes through three phases of maturity, each requiring a different mix of initiatives. Most companies (but not all) are currently moving towards, or already in, the second phase (Embed).
2. Each phase requires a parallel focus on three layers of the organization, each with a tailored change approach and mix of foundational, functional, and enterprise-wide initiatives in the transformation portfolio.
3. The three main barriers to value capture change over time and phase, but for most companies today, this includes Workforce (including adoption), Trust (including cyber), and Data.



Source: KPMG International, "The intelligent enterprise: A blueprint for creating value through AI-driven transformation" (2025)

Phase 1
Enable

This phase focuses on enabling people to adopt GenAI tools and building AI foundations. Organizations appoint a responsible executive, create an initial AI strategy, identify high-value use cases, boost AI literacy, align with regulations, and establish ethical guardrails. AI pilots are launched across functions, while cloud platforms and pre-trained models are leveraged with minimal customization. Knowledge workers are provided safe access to GenAI tools, training, and various initiatives aimed at driving "adoption" and freeing-up time predominantly in current role.

Phase 2
Embed

The focus is on embedding AI into workflows, products, services, and value streams to deliver greater value. A senior leader drives enterprise-wide workforce redesign, re-skilling, and change, embedding AI into operating models with a focus on ethics, trust, and security. AI agents and diverse models are deployed, in addition to pre-trained models and software-embedded AI, supported by cloud and legacy tech modernization, while enterprise-wide data enhances operations. Knowledge workers "reinvest" freed-up capacity into more volume and/or valuable tasks and may change roles.

Phase 3
Evolve

This phase focuses on evolving business models and industry ecosystems with the help of AI, aiming to redefine your company, transform your portfolio of offerings, disrupt markets, and avoid being disrupted by competitors. AI and other frontier technologies are used to solve large sector-wide challenges. AI orchestrates seamless value across enterprises and partners. Emphasizing ethics and trust with real-time security, this phase uplifts human potential with broad and deep workforce training, fostering a creative, innovative, and value-driven future.

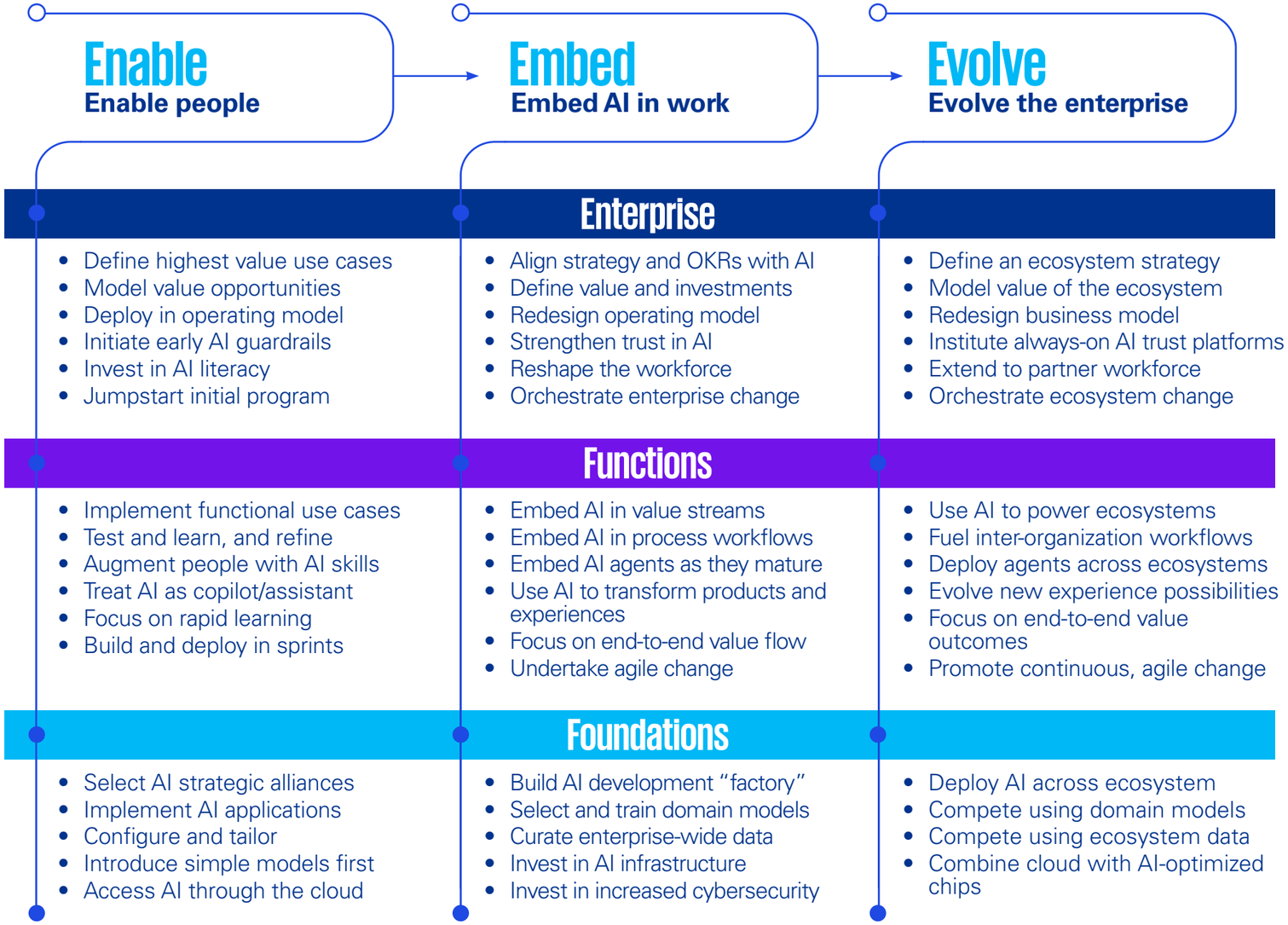
Focus on 3 layers of the organization

Each phase of the transformation requires a parallel focus on three layers of the organization, each with a tailored change approach and mix of foundational, functional, and enterprise-wide initiatives in the transformation portfolio. Without a balanced focus on all three layers, organizations risk missing opportunities for transformation.

At the enterprise layer, increased AI maturity involves orchestrating AI across functions to enable enterprise-wide innovation and strategic alignment.

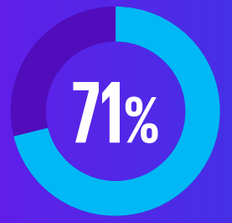
At the functions layer, AI must be embedded into key value streams, optimizing specific processes and creating improved outcomes, such as more compelling products and services, and more engaging, end-to-end employee and customer experiences.

At the foundations layer, organizations must build up the new AI-first technology stack, through a process of technology modernization. Infrastructure, data models, and applications will all be optimized for delivery of AI.



Top 3 barriers to 2025 AI strategy implementation

Quality of organizational data



Risk management, such as data privacy and cybersecurity

Employee adoption

Source: KPMG LLP, AI Q4 2024 Pulse Survey (January 9, 2025)

Overcoming 3 key barriers on the path to value

Unleashing the power of your data is a rapidly rising challenge to address early. Capturing full GenAI value requires that quality data is available to the organization's GenAI tools at the right time. This typically starts with Retrieval Augmented Generation (RAG): extracting relevant information from data sources (e.g., company database); curating the data to align with user expectations for use within GenAI models such as LLMs, SLMs, and Agents; and indexing or utilizing vector databases to store and retrieve information. While this has been a priority for some time, the GenAI era accelerates this need exponentially. And as agentic AI enters the workforce, automation potential will hinge on secure and timely access to quality data; since lead times can be long, the time to start is now.

Managing risk should be an integral part of every AI transformation initiative from day one. It should not be viewed simply as a compliance or risk-mitigation exercise. Risk mitigation is a critical driver of the speed of change as your AI transformation cannot move faster than "the speed of trust." This starts with ensuring you have appropriate Trusted AI policies, frameworks, and governance in place and should also include raising your cyber defenses and safeguarding data privacy. Additionally, seek to leverage existing technology and tools and align your data and engineering processes to your governance models. This allows for more rapid adoption, scalability, and efficiency. Risk's purview should also include building trust among your people and customers so your transformation strategy, design, and execution are anchored in trust.

Overcoming "last-mile" human barriers to GenAI adoption requires behavioral change at scale. Capturing GenAI value hinges on effective change management and people trusting that the technology is both safe and beneficial for them to use. This starts with providing the whole workforce with safe access to GenAI tools, as well as encouraging, motivating, and enabling them to adopt these tools productively. It is equally important to drive behavioral change at scale among knowledge workers to free up a portion of their time and reinvest it wisely in tasks that are equally/more productive for the company. Eventually, capturing the full potential of GenAI will require changing the ways people work together (redesigning workflows), with AI Agents automating parts of the process.

Quantifying GenAI's impact for a Fortune 500 telco company

KPMG helped a Fortune 500 telecommunications company quantify and prioritize their business case for scaling Microsoft 365 Copilot across their organization. The analysis comprised using our AI Workforce assessment to model the jobs and tasks within the organization and to map in potential impact from AI and Copilot. This was coupled with external insights, and internal findings from their Early Access pilot, to inform a directional view of where to go next with scaling their Copilot journey. We reported findings in potential opportunity hours as well as looking at estimated return on investment when aligned with total cost of ownership.

Top Microsoft 365 Copilot use cases identified:

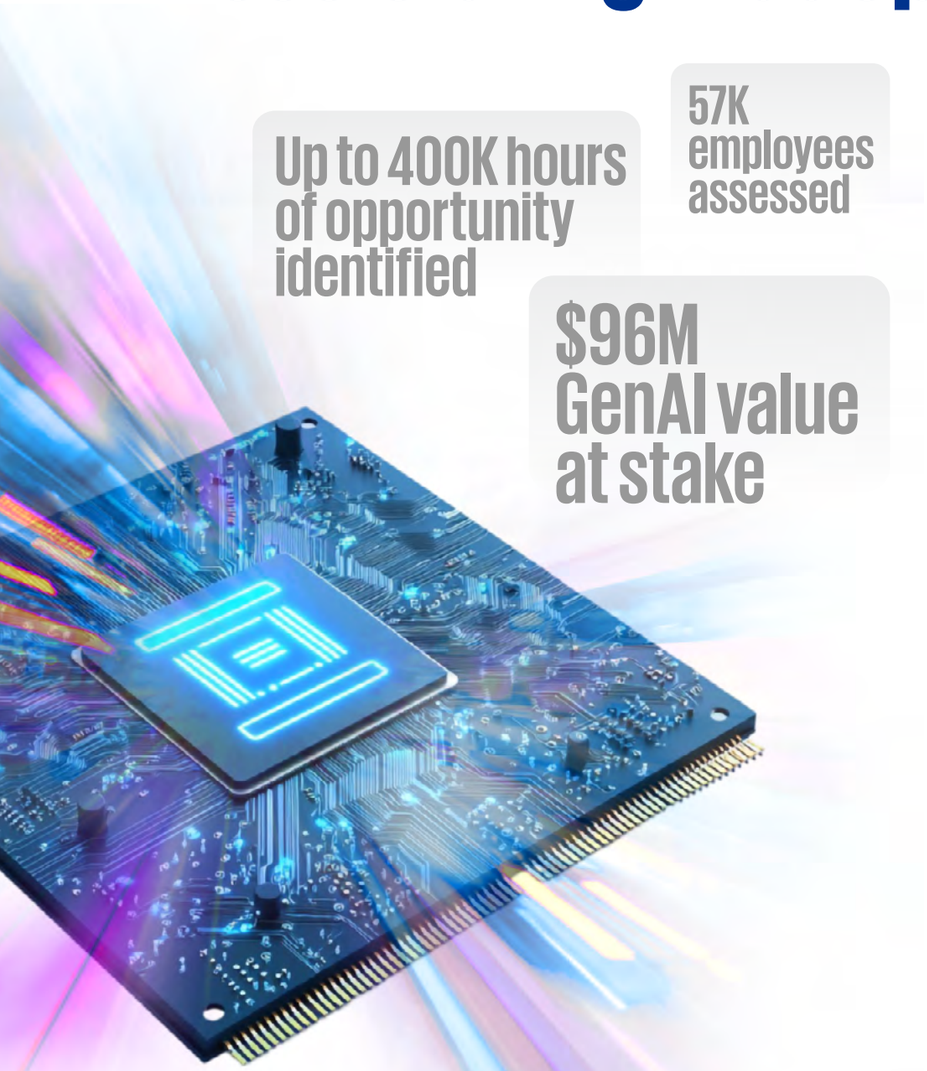
Functions	Customer and Operations	Marketing	Finance	Human Resources	Sales
Opportunity Hours/month (per employee)	~31	~21	~20	~15	~15

Four rollout strategy options provided:

	Priority outcome	Application
	Efficiency: Improve efficiency in key operational areas.	Roll out to back office and high process-led areas first, followed by front office and more creative teams.
	Customer proximity: Put the customer first and increase value.	Customer facing teams, Marketing and Sales go first, followed by enabling teams.
	Follow the demand: Support the client's strategic ambitions and create excitement.	Strategic pillars/markets go first, followed by remaining pillars/markets.
	Prove the value in high-cost markets: Get return on investment to secure advocacy.	High-cost countries with high opportunity hours go first, followed by the remaining high-cost and then low-cost countries.

Applying a human lens to the AI Workforce outputs, we worked with the client to develop top Microsoft 365 Copilot use cases, with the back and middle office functions showing the highest potential. We also provided rollout options for the client in terms of priority outcomes. We have gone on to support the client to build a business value measurement framework to track and monitor value to the organization as more than 60,000 licenses are rolled out globally.

Accelerating AI adoption for a Fortune 100 tech company



KPMG is supporting a Fortune 100 technology company in accelerating adoption of Microsoft 365 Copilot across their organization and validating the actual value captured for a targeted set of 1,000 users. We first used the KPMG AI Workforce assessment model to quantify the addressable opportunity for 57,000 employees, and then shaped an adoption acceleration program tailored to three highest-potential functions.

Opportunity assessed

7h Average number of hours potentially saved per person for 57K employees

- **Up to 400K hours** of capacity gain identified (5% of workforce hours) through Copilot augmentation / automation.
- Average capacity gain potential of **7h per person**, with up to **35-52h per person** for the top five job groups.

Benefit realized to date

2.7h Average time saved to date per person after first 4 weeks for 1K employees

- **86% monthly active users**, of which 64% had daily usage and 16% used Copilot more than five times/day
- Active users reported average savings of 2.7 h per month with top **16% saving 4-20h or more** per month

Value potential at scale

$96M Value of time freed up by successfully scaling impact realized during pilot phase to remaining users

- Based on actual monthly time saved for 1,000 employees during the pilot phase **multiplied by their annual salaries.**
- Assuming at least similar average impact across remaining employees sustained during next 12 months

KPMG validated the impact for 1,000 employees across three functions, reaching monthly adoption of 86% with an average of 1.9 interactions per person per day. Time saved monthly per active user was 2.7h, releasing $4M in labor capacity annually. Our team is now working to scale this approach to remaining employees, with $96M in capacity value at stake.

Shaping AI strategy for a PE-PortCo in Manufacturing

$124M
GenAI value at stake

Up to 360K hours opportunity identified

18K employees assessed

KPMG is assisting a private equity (PE)-owned multinational automotive technology and manufacturing company to accelerate product and service innovation, increase speed to market, enhance productivity, and achieve operational efficiencies through AI. KPMG helped launch three pilots, defined the overall AI strategy, specified the enabling technology and tools, and developed a three-year roadmap to achieve their AI vision.

AI portfolio created

54 **Number of prioritized use cases in roadmap for deployment**

- Prioritized on the basis on business value and feasibility for rapid activation
- Balanced portfolio across Product/R&D, Manufacturing Operations, and Back Office functions

Pilots to deliver immediate value

3 **Across various patterns from Knowledge Search, Technical Document Drafting, and Predictive Modeling**

50% Daily recurring users

95% Observed Accuracy

4+ Hours saved per research

80+ Hours saved per RFQ response

Path forward

ELEVATE | Year 1

500+ Employees using AI

10+ Use cases

10% Employees educated

SCALE | Year 2

1,000+ Employees using AI

25+ Use cases

20% Employees educated

PROPEL | Year 3

2,000+ Employees using AI

45+ Use cases

30% Employees educated

KPMG defined the Enterprise AI Operating Model and evaluated the client's AI capabilities to identify foundational efforts required to enable AI at scale. Additionally, KPMG identified the AI skillsets and roles needed for successful activation.

How KPMG can help

We help turn AI into your competitive edge, working side-by-side from strategy to execution, with a people-centric approach grounded in trust. Think bigger, plan smarter, start stronger, and safely go faster with our help. With AI we can help create lasting value together—start now by taking advantage of our portfolio of AI services.

Do you need to:

Quantify GenAI value potential across your organization to inform investment decisions, your strategy, and next steps?

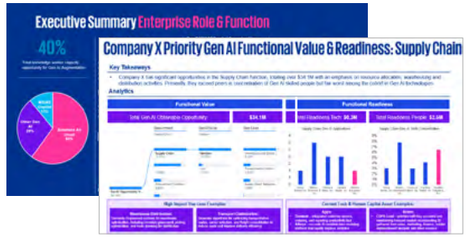
Accelerate adoption of AI by empowering your workers with personalized support to augment their daily work, including the use of agents?

Reshape your organization and upskill key roles to best integrate digital labor into the workforce ecosystem?

Measure ROI with data and a balanced view of multiple value drivers, including cost, adoption, experience, productivity, growth, and profitability?

KPMG AI Strategy

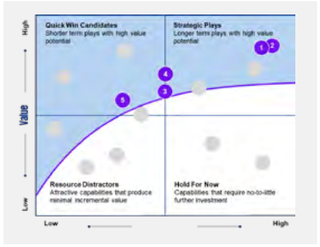
Helps shape your AI strategy and GenAI business case with an actionable roadmap



- Shape your AI strategy and execution plan tailored to your unique starting point
- Build a credible business case with quantified returns/metrics to help drive investments and release project funding

KPMG AI Jumpstart

Accelerates your path to value from proof-of concept to launch to adoption at scale



- Identify use cases and accelerate path to value with a replicable proof-of-concept factory approach, including agents
- Safely experiment with GenAI tools and scale adoption of tested use cases/agents across your organization

KPMG AI Workforce

Unlocks the full potential of GenAI for, and with, your people during the journey

- Augment your workforce with GenAI tools, enabling more strategic work and accelerating efficiencies
- Reshape your workforce and define AI governance to help realize the full potential of GenAI investments

Learn more: **www.kpmg.us/AIservices**

About the authors

Per Edin
AI Go-to-Market Leader – Global Advisory and US Tech, Media and Telecom Sector, KPMG US

With dual global and US leadership roles, Per is responsible for the alignment of AI client offerings, messaging and go-to-market approach across the global network, and for driving AI-related growth in the US Technology, Media and Telecommunications sector. His work has included leading the firm's efforts to help clients navigate the GenAI market disruption, launching the firm's Advisory AI Services portfolio, and other unique assets like the GenAI value assessment.

Sanjay Sehgal
Head of AI and Analytics Solutions – Global Advisory, KPMG US

Sanjay is the Head of AI and Analytics Solutions, Global Advisory, and is responsible for driving the expansion and globalization of AI and analytics capabilities across KPMG Consulting and Deal Advisory. He leads the development and implementation of AI and Analytics platforms, while fostering collaboration with technology and AI leadership to maximize the value of firm-wide investments. He works with KPMG member firm analytics teams to standardize and scale best practices globally.

Ruth Svensson
Partner, Global Head of People and HR CoE, KPMG UK

Ruth is a trained organizational psychologist and Global Head of the KPMG People and HR Center of Excellence. Her knowledge of how people drive value in business has been central to her work on global transformation programs for some of the firm's largest clients. She coaches the C-suite through transformations and leads the implementation of solutions including operating model change, learning and skills transformation, workforce shaping, and behavioral change management.

Htike Htike Kyaw Soe
Managing Director, Firmwide Analytics Solutions, KPMG US

Htike Htike is a Managing Director in Firmwide Analytics Solutions. She leads the development of innovative data analytics and AI solutions, leveraging a variety of client, third-party and alternative data sources to drive new service offerings and enhance existing ones. Prior to this role, she worked at Meta, focusing on marketing analytics for Facebook's clients. Before that, she established and led an analytics team at KPMG, enhancing the firm's Deal Advisory services to be more data-driven.

John Pacilio
Managing Director, Advisory Data Organization, KPMG US

John leads a large team of D&A strategists who leverage the firm's vast sources of public and proprietary data to solve Advisory client challenges. He has supported client opportunities ranging from healthcare data science needs to financial services customer acquisition strategies. He has previously worked in financial services roles and earned an MBA, as well as completed studies in AI, through MIT and the University of California.

John Doel
Principal, Human Capital Advisory, KPMG US

As a Partner in the Human Capital Advisory practice, John specializes in Workforce Transformation, digitizing and modernizing the enterprise through technology-enabled transformation program strategies, planning and execution. He is a KPMG thought leader, responsible for architecting and delivering KPMG GenAI Workforce Transformation solutions across the entire GenAI Workforce imperative, including value identification, human-AI collaboration role redesign, learning, adoption and workforce shaping.

Additional contributors:

Michael Allen, Partner, Head of Consulting- Health & Global Workforce Lead, KPMG UK

Kevin Bolen, Principal, Advisory AI Transformation Leader, KPMG US

Elliot Brook, Principal, Advisory, Lighthouse, KPMG US

Andrew Getz, Partner, Advisory, Deal Advisory and Strategy Market Activation Lead, Financial Due Diligence, KPMG US

Rahul Mehta, Principal, Advisory, CIO Advisory, KPMG US

Robert Parr, Chief Data Officer, Advisory Data Organization, KPMG US

Phil Wong, Principal, Advisory, Tech, Media and Telecom Strategy, KPMG US

Contact us

Per Edin
AI Go-to-Market Leader – Global Advisory
and US Tech, Media and Telecom Sector
pedin@kpmg.com

Sanjay Sehgal
Head of AI and Analytics Solutions – Global Advisory
sanjaysehgal1@kpmg.com

John Doel
Principal, Human Capital Advisory
jdoel@kpmg.com

Some or all of the services described herein may not be permissible for KPMG audit clients and their affiliates or related entities.

Please visit us: **kpmg.com**