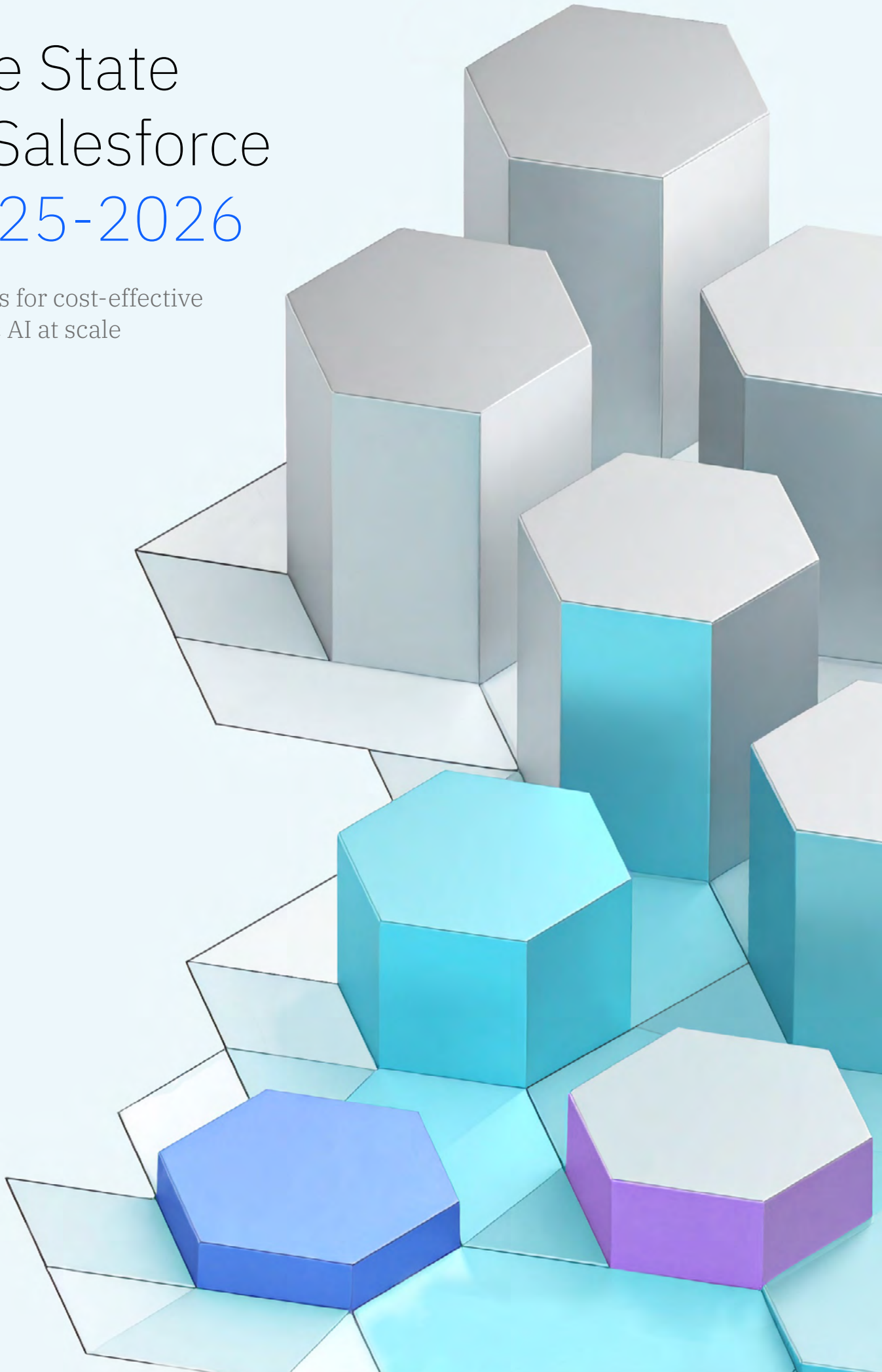
IBM Institute for Business Value

The State of Salesforce 2025-2026

3 pillars for cost-effective agentic AI at scale



IBM

How IBM can help

Partnering with Salesforce for more than 25 years, IBM has developed a deep understanding of the unique needs of large enterprises. By combining our expertise in AI, hybrid cloud, and enterprise transformation with the power of Salesforce, we help unlock new levels of efficiency, innovation and growth on your Salesforce journey. Our certified Salesforce consultants solutions achieve customer success by harmonizing your existing infrastructure, minimizing disruption and maximizing ROI on your CRM investment.

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Despite rising AI investments, 74% of Salesforce customers still struggle to move the needle on customer experience and engagement.

Key takeaways

Pillar #1: Optimize ROI while managing unpredictability.

The ROI on Salesforce AI investments depends on where, and how, the technology is used. Agents and assistants show early traction in IT, sales, and service, proving their value and justifying continued investment as cost management challenges rise.

Pillar #2: Make governance your competitive accelerator.

Only 21% of Salesforce customers are confident they have the right governance for agentic AI. As digital labor increasingly makes autonomous decisions, especially in customer-facing areas, most organizations fall short on the accountability necessary for human-AI collaboration.

Pillar #3: Give AI agents a 360-degree view beyond Salesforce.

Only 26% say most of their customer data resides in Salesforce, which means nearly three out of four Salesforce customers are needlessly missing a treasure trove of value. Those connecting Salesforce to third-party platform and mainframe data see better business outcomes, including deeper customer insights and cost savings.

Agentic AI is bundled in with CRM platforms—but it's on leaders to deliver the ROI

Last year's State of Salesforce highlighted three priorities: unlocking the full potential of data, tailoring AI use cases for optimum business impact, and building competencies through ecosystem partners.[1] The state of the market was clear— companies weren't held back by a lack of data, but by the ability to leverage existing data effectively.

Fast forward to today, and the challenge has intensified. The AI revolution continues to promise transformation, but for many Salesforce customers, it's delivering more invoices than insights. Still caught among complex tech stacks and fragmented data architectures, they face mounting pressure to deliver ROI on AI investments.

New research from the IBM Institute for Business Value (IBM IBV) highlights the growing gap between ambition and reality. For 1,200+ Salesforce customers surveyed, only 33% of AI initiatives are meeting ROI targets. Even more concerning: 72% have failed to scale across business units, and 20% have stalled, failed outright, or been abandoned. When customers demand instant relevance and precision from brands,[2] organizations simply can't afford to slow down. They must figure out how to turn AI from a cost center into a financial growth engine.

This underperformance comes at a pivotal moment—just as AI makes its evolutionary leap from advisor to actor. While traditional AI tools suggest and automate narrow tasks, requiring constant human supervision, a new breed of autonomous agents is emerging. These agentic systems independently perceive, reason, and execute complex actions toward defined goals with minimal human oversight.

Salesforce's introduction of low-code agent builders has democratized this advanced capability, and executives are responding with renewed optimism. When asked about specific builders such as Agentforce, most respondents in our study are betting big, predicting it will boost operational efficiency (68%), fuel product innovation (65%), and drive business outcomes (61%).

But here's a catch: even though agent builders are bundled into Salesforce and other platforms, business value isn't guaranteed. Without a shared source of truth across clouds, platforms, functions, and workflows, agents will be limited to isolated tasks, unable to deliver value across the enterprise. Our research shows that unlocking outcomes with agentic AI takes more than turning on features or building agents. It demands a reimagining of how AI, platforms, and people come together to serve the customer—in every moment, on every channel.

Our analysis revealed a group of organizations that are most likely to successfully scale AI agents across the enterprise. They have optimized the ROI of AI amid cost unpredictability, prioritized rigorous governance, and harnessed a gold mine of data beyond Salesforce. These leaders report 60% greater efficiency, 57% more effective customer insights, and more than two times greater pipeline expansion. Their AI investments not only deliver expected ROI more frequently than their peers but also enable scalability across the business.

In this report, we explain how enterprises can follow these pioneers and bridge the gap between AI promise and performance. In part one, we explore financial optimization, showing how organizations can accelerate AI ROI and manage cost unpredictability through strategic deployment. Part two addresses the critical need to evolve governance models to match AI's increasing autonomy—embedding guardrails that build confidence and enable faster scaling. In part three we focus on the interoperability of Salesforce with other systems, demonstrating how enterprise-wide data sources can deliver greater value. We end with an action guide, offering specific steps organizations can take now to turn agentic AI potential into tangible results.

Salesforce customers say only 33% of AI initiatives are meeting ROI targets.

Perspective

Agentic AI outlook

59%

of Salesforce customers say the benefits of agentic AI will outweigh the effort and investment required to scale it successfully.

Here is a snapshot of where they are.

Areas of agentic AI adoption

- 32% IT, security, or data management
- 31% Customer service
- 24% Sales
- 21% Human resources
- 20% Operations and supply chain
- 20% Marketing
- 19% Business development

Biggest barriers to agentic AI adoption

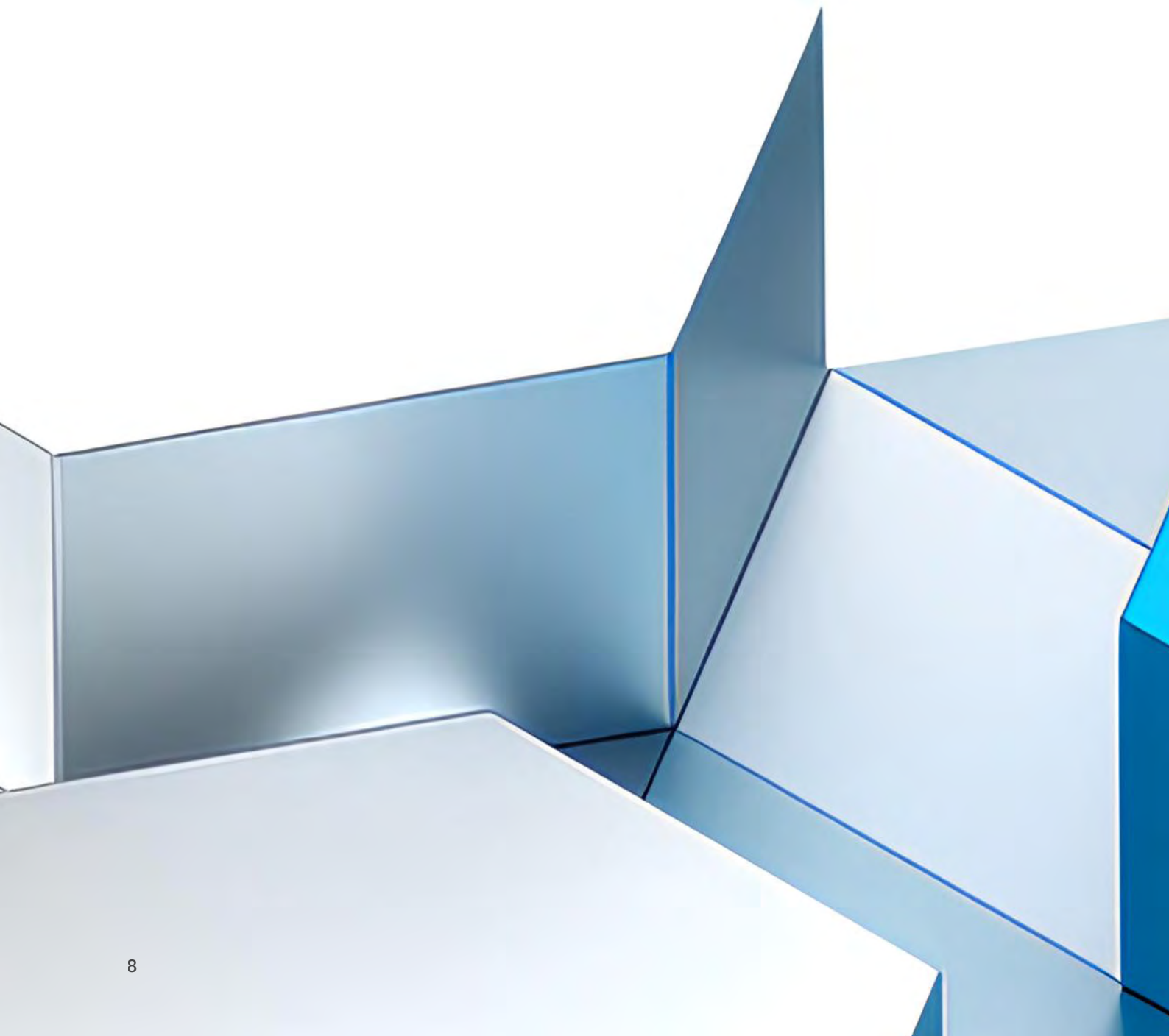
- 53% Data availability and quality
- 41% Unclear business value
- 39% Financial viability

Expected impact of agentic AI on key business outcomes

	Customer experience	Product and service innovation	Operational efficiency
Negative impact	8%	12%	8%
No impact	22%	23%	25%
Positive impact	70%	65%	68%

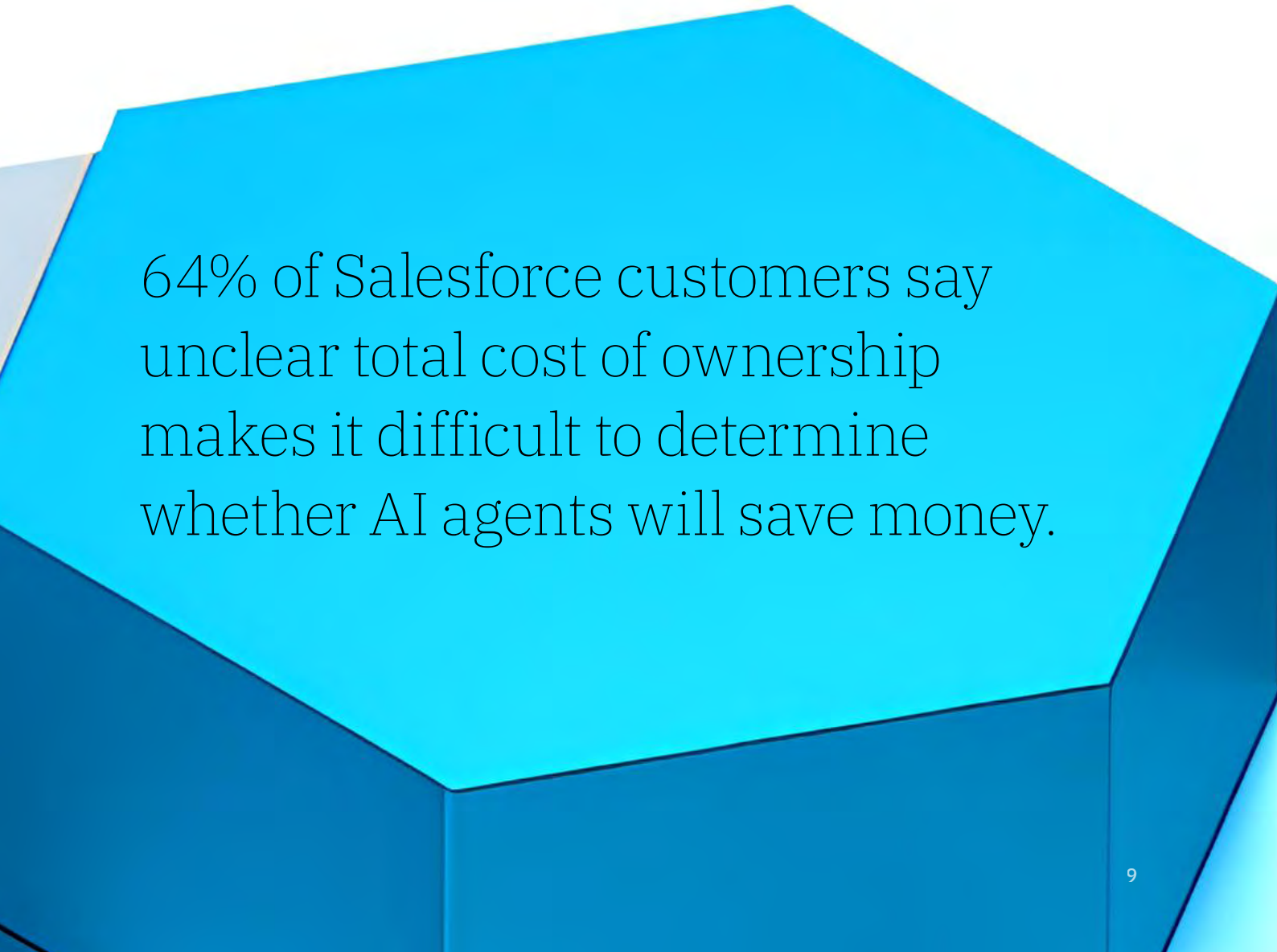
Pillar 1: Optimize ROI while managing unpredictability

Give agents an outcome—or take them off the payroll.



The AI gold rush has left executives with a distressing invoice. AI spend is growing rapidly, yet key functions face sprawling ecosystems of clouds and tools that don't fully communicate. What should be powering growth is instead a financial quagmire.

The shift to consumption-based AI pricing is only turning up the pressure. In our research, 62% of Salesforce customers express concern about unpredictable AI-related costs, and 64% report that unclear total cost of ownership makes it difficult to determine whether AI agents will save money or quietly inflate budgets. The problem extends beyond simple price tags to include implementation timelines, maintenance costs, continuous retraining, platform updates, and the often-overlooked expenses of employee upskilling as well as adoption and performance tracking. These all add up to the inability to measure and manage AI's true financial impact over time.



64% of Salesforce customers say unclear total cost of ownership makes it difficult to determine whether AI agents will save money.

How to combat AI cost uncertainty

Forward-thinking organizations fight financial and operational uncertainty by treating AI agent investments with the same disciplined oversight they apply to human workforce decisions. Rather than relying solely on projected savings or revenue, leaders can use risk-informed ROI frameworks that consider both holistic financial returns and broader organizational impacts to help create clarity amid the complexity.

Executives also need accountability for where and how AI agents are deployed (see Perspective, “How to measure AI agent performance”). That means tying each agent to specific business outcomes, setting baselines up front, and measuring results against both financial and operational expectations. And, importantly, it requires a willingness to sunset what doesn’t deliver.

Where AI is proving its worth

Organizations report growing investment in areas where AI can directly impact both the top and bottom line (see Figure 1). Customer self-service leads the way (70%) followed closely by e-commerce (65%). Back-office operations are seeing a parallel surge: 64% point to increasing investments in marketing automation, 61% in IT platform and service management, and 57% in security and compliance monitoring.

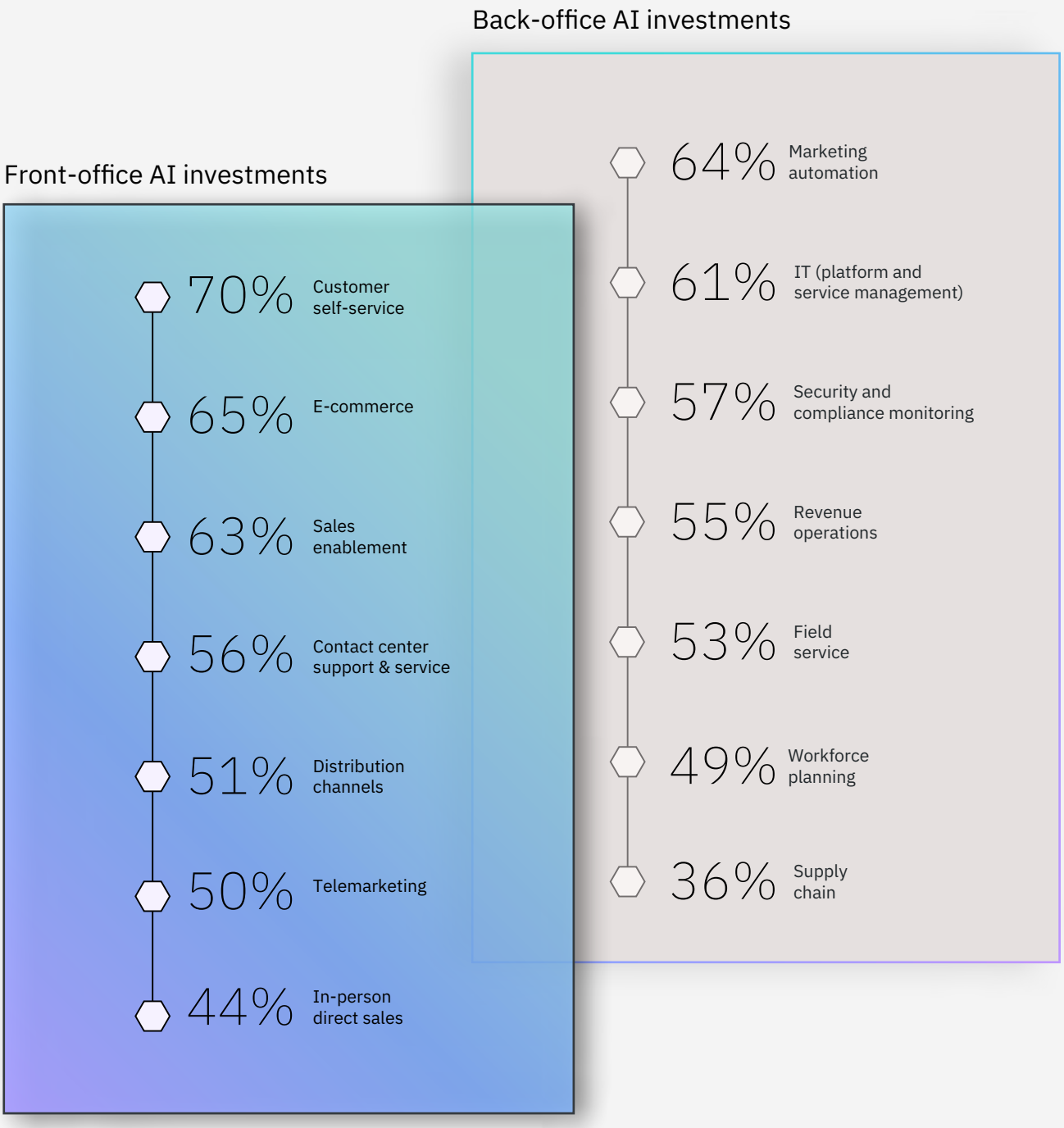
Top organizations also match their AI approach to the use case—not the other way around. While agentic AI offers advanced autonomy, it isn’t automatically the most effective choice for every scenario. Different types of AI should be used as appropriate.

Today, Salesforce customers report generative AI is delivering the strongest ROI in marketing, sales, and IT, while AI agents and assistants are gaining early traction in IT, sales, and customer service. Aligned with business needs, these targeted applications are proving their value—and earning sustained investment in an uncertain economic landscape.

Figure 1

AI is moving beyond front-office experiments to reshape the entire enterprise.

Percent saying investments have somewhat or significantly increased because of AI



Q. How has AI changed your organization's financial investments in the following areas/revenue channels over the last year?

Perspective

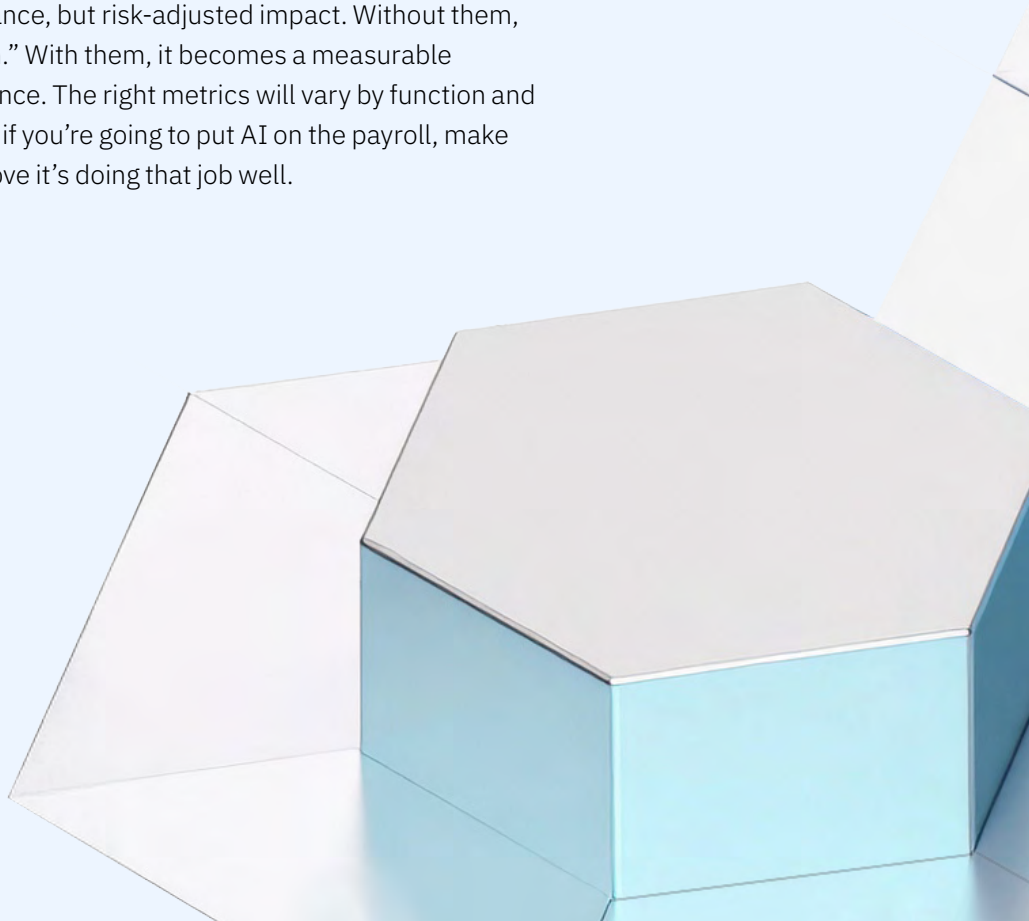
How to measure AI agent performance

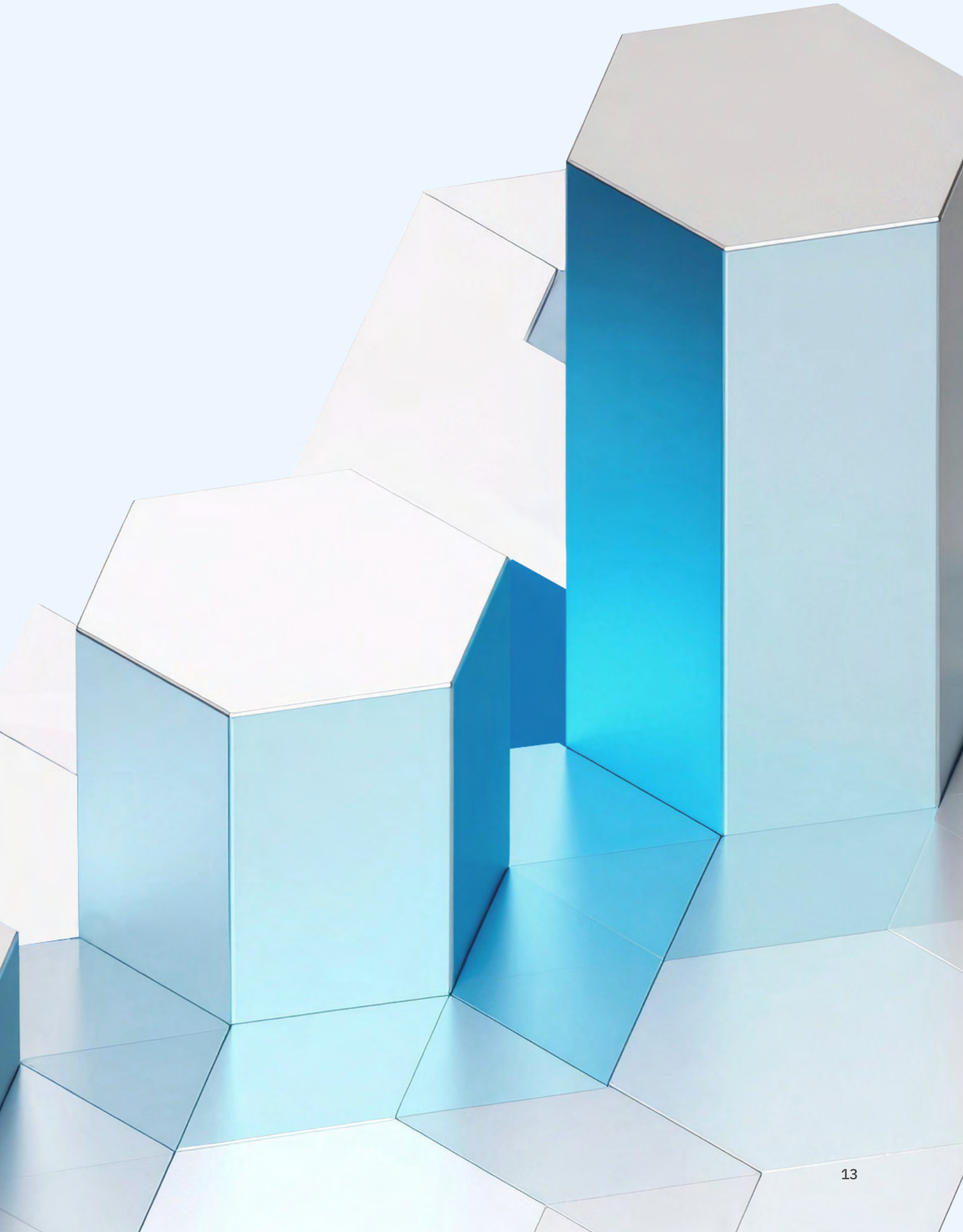
Holding AI accountable is easier said than done. Unlike human employees, AI agents don't submit reports, sit in performance reviews, or visibly "clock in." That makes measuring their impact tricky—and it's why many organizations struggle to define success beyond vague aspirations such as "improved efficiency" or "better experiences."

A practical starting point: give every AI use case a "job description" tied to risk-adjusted ROI. What is this agent supposed to accomplish, and what is the performance baseline? Crucially, what are the expected benefits after accounting for uncertainty, operational risk, and adoption rates? What will success look like at 30, 90, and 180 days?

In sales, for example, an AI assistant might improve lead conversion or reduce days-to-close, but the evaluation should weigh potential revenue gains against the risk of incorrect recommendations or failed automations relative to the baseline. In customer service, an agent could resolve cases faster, but metrics must adjust for escalations or human intervention.

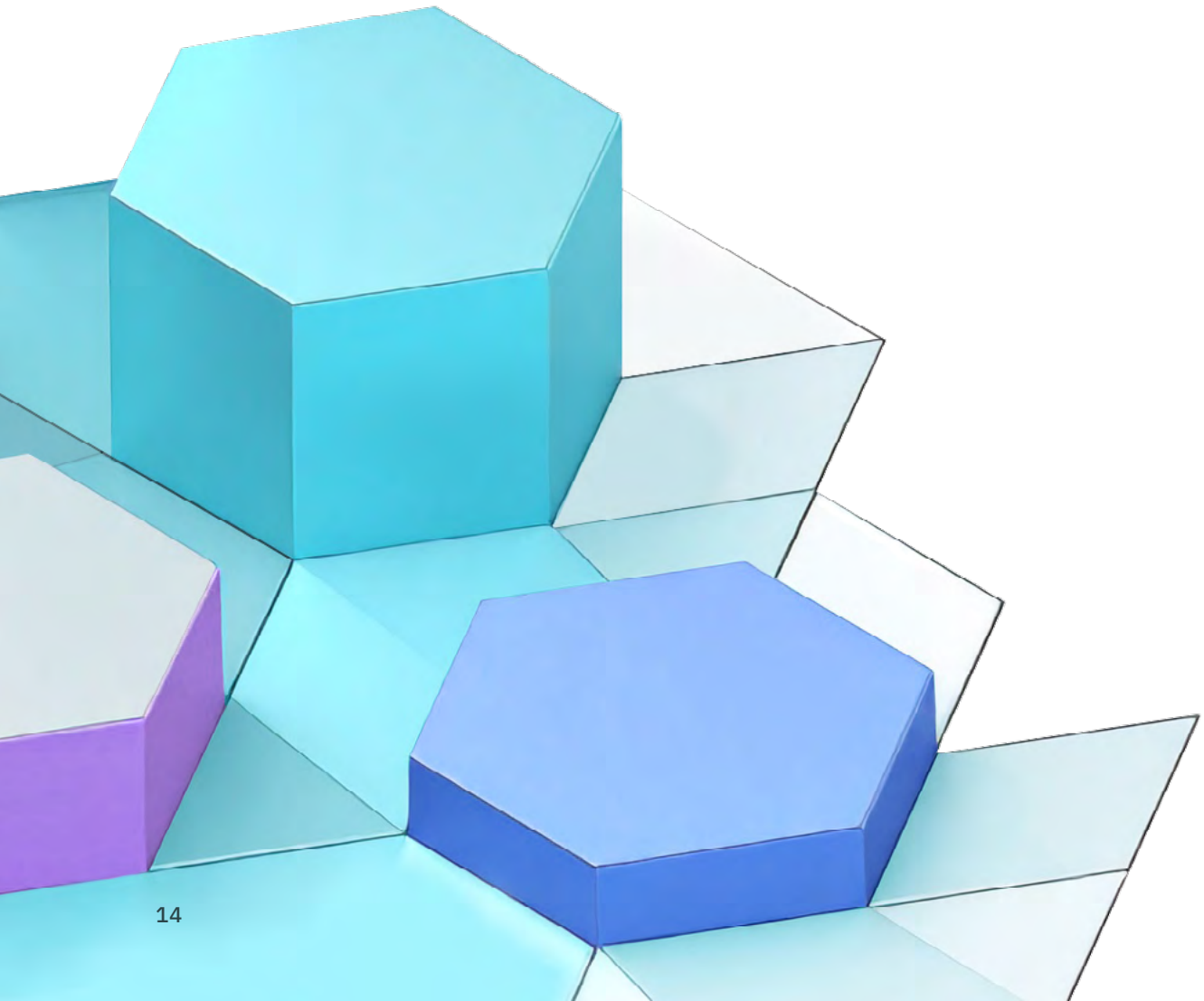
These aren't just metrics; they're accountability anchors that allow executives to measure not just raw performance, but risk-adjusted impact. Without them, AI stays in the realm of "cool tech." With them, it becomes a measurable contributor to business performance. The right metrics will vary by function and use case. But the principle holds: if you're going to put AI on the payroll, make sure it has a job—and a way to prove it's doing that job well.





Pillar 2: Make governance your competitive accelerator

Workflow decisions are being made—with or without you.



AI systems are increasingly making autonomous decisions affecting customers and operations. With operational integrity and brand reputations on the line, how decisions are made, security, and risk management must be more than a compliance checkbox.

But the adoption of governance frameworks isn't keeping pace with technology advancements. Nearly three in four Salesforce customers say the increasing use of digital labor elevates the need for risk management, which they also report as the second most critical success factor for agentic AI initiatives. Yet only 21% strongly agree that they have the governance necessary. A mere 9% consider risk a top consideration when evaluating AI tools and initiatives.

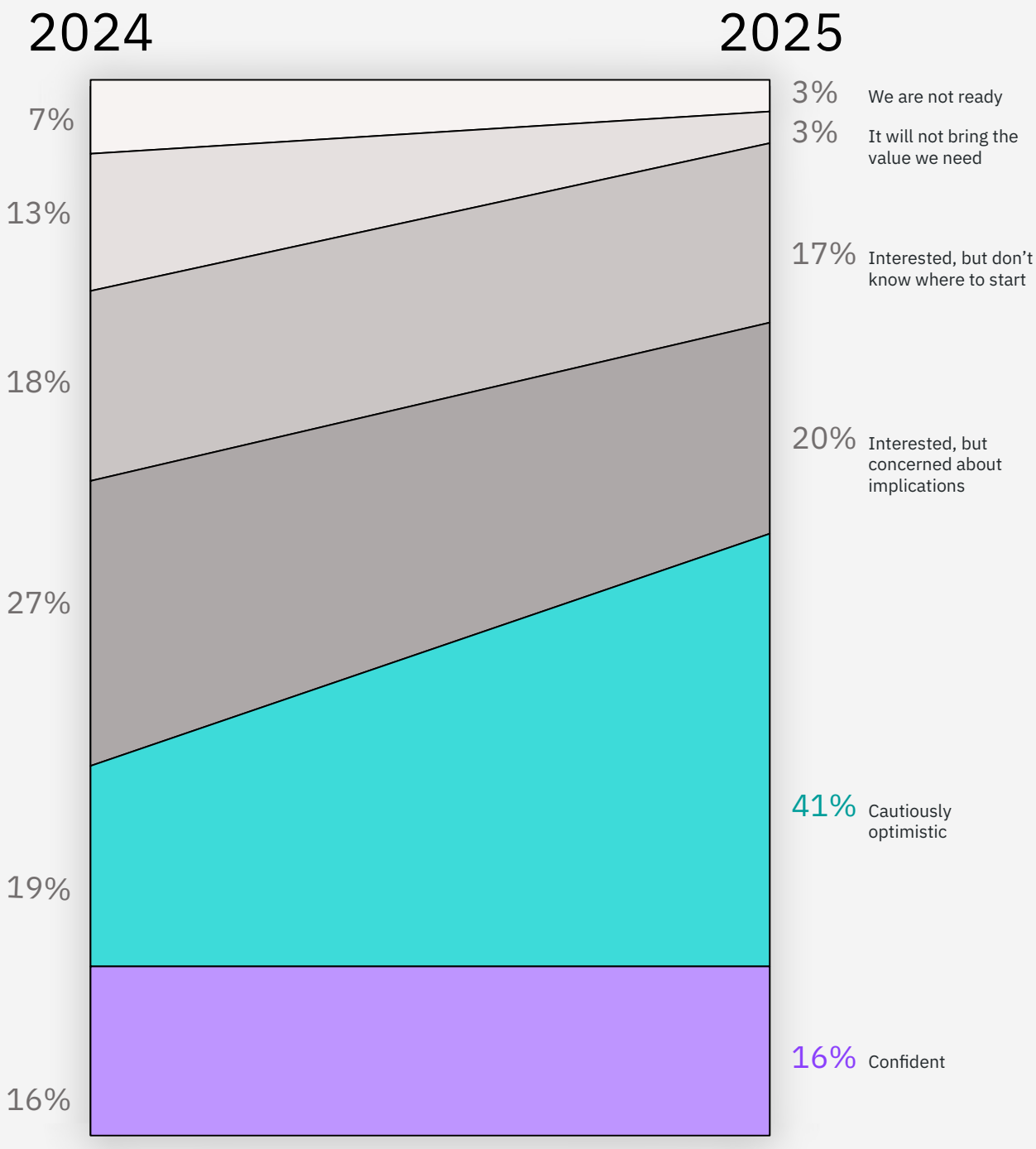
The governance challenge extends to talent management. Two-thirds of leaders expect agentic AI to change how they structure teams and departments, and most executives (73%) anticipate AI will free employees for higher-value tasks. But they are rushing into a new era of human-AI collaboration without the necessary guardrails. In fact, only 30% of executives consider clear guidelines around human-AI collaboration a critical success factor for agentic AI initiatives. And more than half (56%) have not issued comprehensive guidance to employees on the use of AI. This could explain why executive confidence in using AI to transform customer and employee experiences remains frozen at last year's level, 16%, even as cautious optimism grows (see Figure 2).[3]

How governance boosts confidence in AI

The governance gap presents a strategic opportunity: organizations that establish trusted governance gain the confidence to accelerate AI adoption and scale responsibly—ultimately allowing them to innovate faster and seize a competitive advantage. In our research, organizations further along in scaling agentic AI also had strong governance practices in place, and consequently had greater confidence in transforming experiences with AI.

Figure 2

Executives shift from concern to cautious optimism about their AI capabilities, but full confidence remains elusive.



Q. What best describes your organization's view about using AI workflows to transform customer and employee experiences?

Closing the gap in AI governance

If governance is so critical, why has implementation lagged? Because true governance transcends policies—it requires anticipating how AI systems behave under real-world pressures, in varied contexts, and over time. Without this foresight, blind spots multiply: corrupted or misleading data stored in an agent's memory slowly distorts decisions, poorly scoped integrations trigger unintended actions, and unchecked privileges open the door to security risks.[4]

Industry and geographical realities compound these challenges. Healthcare and financial services organizations navigate strict compliance rules. European entities face data sovereignty and cross-border requirements. Meanwhile, companies integrating AI with mainframe systems face elevated security and privacy considerations for their most sensitive data, and the shift toward more open AI models—open source, open weights, open data—intensifies the demand for transparency and auditability.

In this environment, governance must evolve from a compliance function to the operating system for enterprise AI. Traditional approaches built on static policies and periodic checkpoints can't match agentic AI's speed and adaptability. Instead, governance must become dynamic and embedded—setting guardrails that help prevent costly errors while enabling growth, rapid decisions, and differentiated customer experiences. Compliance, security, and risk thresholds must be built directly into AI agents so they can operate safely in regulated workflows without slowing the business—supported by continuous feedback loops to detect drift early and by clear protocols for human intervention. Organizations that embrace this proactive approach can make risk mitigation and governance the foundation for responsible, high-impact AI adoption and a strategic differentiator.

Governance must evolve from a compliance function to the operating system for enterprise AI.

Case study

NDS Cognitive Labs and Clip: Expanding financial inclusion in Mexico through AI[5]

Mexico faces significant financial inclusion challenges, with 38% of adults remaining unbanked despite owning mobile phones—presenting an opportunity for digital financial services. Clip, a rapidly growing Mexican fintech unicorn, is helping advance financial inclusion by enabling hundreds of thousands of businesses, many of whom are new to financial services, to accept digital payments.

With thousands of new users monthly and without traditional banking infrastructure, Clip needed an efficient way to support customers unfamiliar with financial services concepts such as fees, account setup, and credit lines.

NDS Cognitive Labs customized and deployed an AI virtual assistant platform tailored to Clip's specific needs. NDS Cognitive Labs used natural language processing, integrated with NeuralSeek and running on the cloud, to develop an advanced conversational AI solution that leverages retrieval-augmented generation (RAG). This approach allows the chatbot to identify user needs and retrieve real-time information from external databases, providing contextually rich responses to a wide range of inquiries.

The solution seamlessly integrates with Salesforce Cloud, enabling the AI assistant to generate leads, create support cases, validate identities, and access CRM data. Through natural language processing, it recognizes product references and guides customers with suggestions when needed.

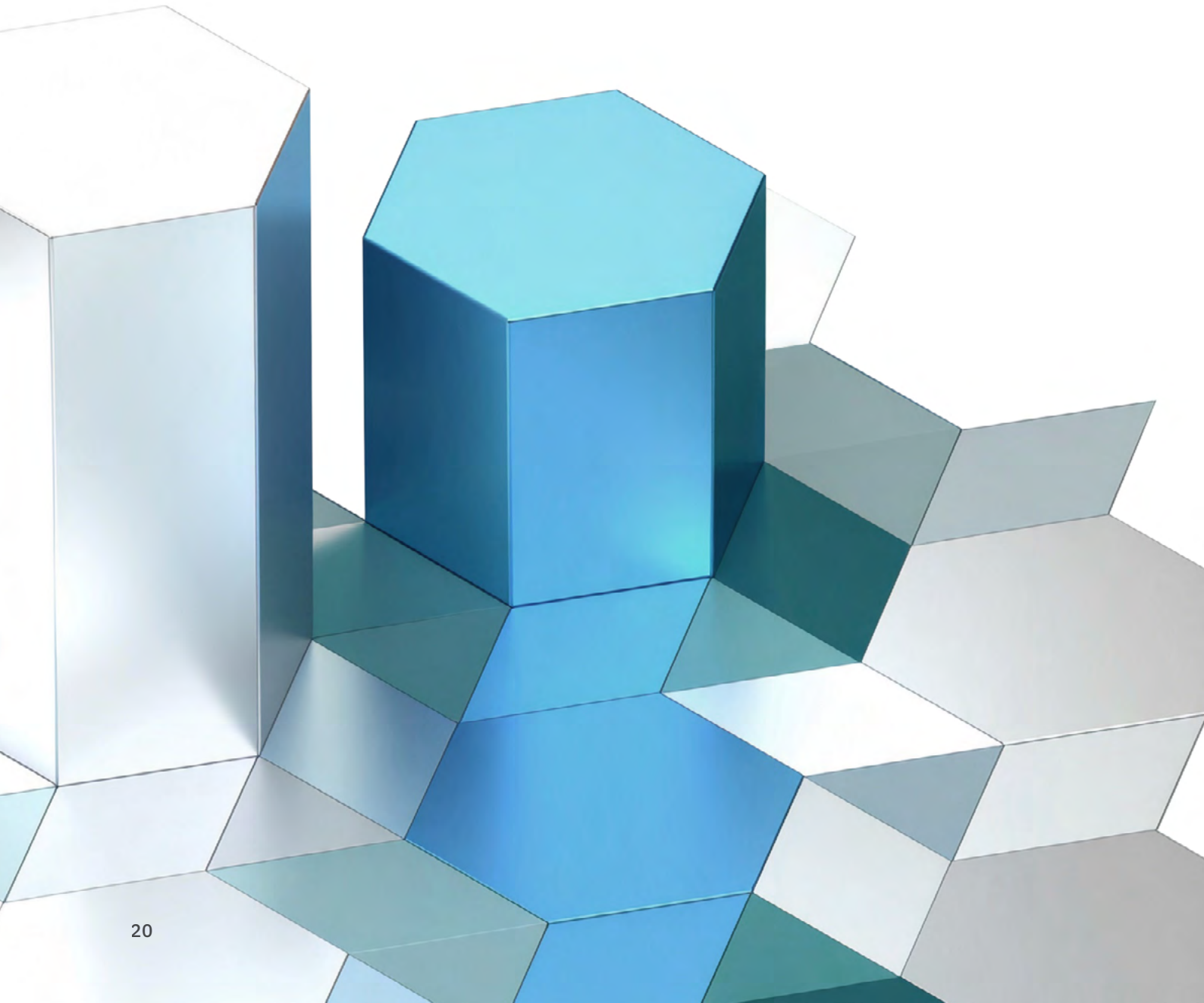
The results are impressive. The virtual assistant:

- Resolves over 66% of inquiries autonomously
- Delivers 80% faster average interaction times compared to traditional call centers
- Has driven a 28% annual increase in chatbot usage.

Clip's omnichannel service can handle 6,000+ simultaneous interactions while freeing human agents to focus on complex issues.

Pillar 3: Give agents a 360-degree view beyond Salesforce

Agents aren’t the starting point. Your data is.



Because AI agent creation is low-code, teams can be tempted to begin building right away. But starting here is risky—data must come first. On the competitive battleground for customer loyalty, data powers what matters most, and the stakes are high. In our Salesforce customer survey, customer experience (66%), product and service innovation (60%), and AI adoption (57%) top the priority list over the next two years. And 69% of executives now say AI must be interoperable across platforms to have significant impact on their business.

Why fragmented data persists as a barrier to AI

Awareness doesn't always lead to outcomes. Despite rising AI investments, 74% of Salesforce customers still struggle to move the needle on customer experience and engagement. Why? Because delivering on customers' new standards for precision, prediction, and protection depends on the right technology foundation—which remains a challenge for many. When asked about their biggest roadblocks, Salesforce customers cite modernization of legacy systems (64%) as their number one concern. For agentic AI specifically, poor data availability and quality is the leading adoption barrier (53%).

69% of executives say AI must be interoperable across platforms to have significant impact on their business.

The fundamental issue is fragmented data. Low-code platforms accelerate the building of AI agents, but for most organizations, these agents are still flying blind, cut off from reservoirs of enterprise data. Only 26% of executives report that their customer data primarily lives within Salesforce. For the remaining 74%, critical data that contains competitive advantage—from order histories in ERP systems to claims data in insurance mainframes to transactional and billing data in financial systems—is trapped in silos, effectively limiting the view of AI agents into the full customer context. Organizations that ignore these data gaps are 45% less likely to have successfully implemented agentic AI in their enterprise.

For agentic AI specifically, poor data availability and quality is the leading adoption barrier (53%).

How integration technology dissolves data silos

Fortunately, tapping into the data held in existing systems doesn't require rebuilding from scratch. Modern integration technologies such as zero-copy data integration and data fabrics make it possible to unleash valuable data from complex back-office systems and mainframes, without the cost, disruption, or risk of moving it.

Instead of physically migrating data, zero-copy creates virtual access points so applications and analytics tools (including AI) can work with information in real time while leaving data securely where it lives. Data fabric technologies then connect these sources across silos. And emerging AI interoperability standards such as Model Context Protocol (MCP) and AI-to-AI (A2A)–which now incorporates the Agent Communication Protocol (ACP)–establishes the framework for seamless system integration and communication. In banking, integration technologies can enable pulling fraud-detection signals from credit systems without migration. In healthcare, it could involve combining electronic health records with scheduling and billing in real time, without touching the underlying systems.

The proof is in the performance (see Figure 3). Organizations that connect Salesforce with external platforms such as Adobe, SAP, or Oracle are nearly three times more likely to report a highly successful 360-degree customer view, 2.4 times more likely to produce cost savings, and twice as likely to cite deeper customer insights. These benefits translate into broad business outperformance. Connected enterprises report significantly stronger revenue growth, profitability, innovation, and customer engagement than their peers. For a $19 billion company, connected platforms could mean roughly $140 million in additional revenue. Plus, it can mean a 2% savings in reduced implementation and development costs.

Even mainframe integration—often seen as complex and high risk—can deliver substantial returns. Salesforce customers that have connected mainframe data were nearly 30% more likely to report significant cost savings and more accurate AI predictions when compared to those without mainframe connectivity to Salesforce.

In the end, an AI agent is only as effective as the data it can access. The future of customer experience will be won by those who build connected, intelligent ecosystems where technology, data, and human insight converge.

Case study

Water Corporation: Transforming concession processing with integrated data[7]

Western Australia's Water Corporation delivers essential water services to over 1.3 million customer accounts, including processing more than 40,000 annual concession applications for pension recipients and other eligible customers. Their decade-old application processing system relied on manual workflows that couldn't scale to accommodate growing workloads and struggled to store historical records securely.

Partnering with IBM, Water Corporation implemented an eConcessions platform powered by Salesforce Service Cloud—extending its use of Salesforce as their strategic customer support platform. The eConcessions platform offers streamlined, automated process workflows that seamlessly transition concession applications throughout the initial stages of validation and authorization.

The extensive integration capabilities of the Salesforce platform enable the solution to pair with:

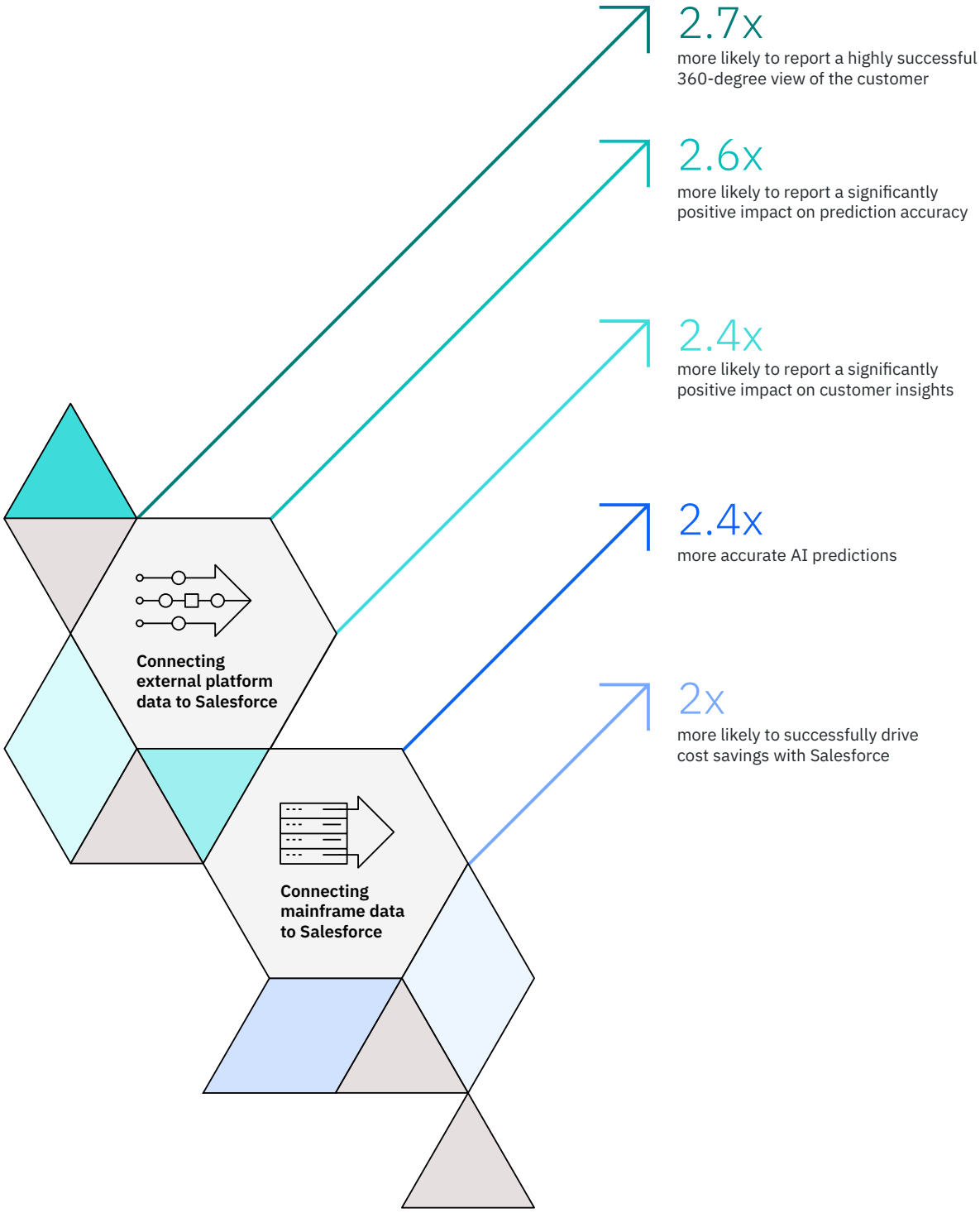
- The corporation's existing website
- Billing and customer communication systems
- Local government authority systems for external processing.

The solution's integration capabilities allow data exchanges in near real time, reducing human errors that could delay a given application. The results were transformative:

- Automated concession verification in most cases
- Accelerated validation processes
- Improved employee efficiency and satisfaction through consolidated data access in a single console
- Enhanced scalability to accommodate growing application volumes and historical records.

Figure 3

Organizations breaking down data silos realize better business outcomes.



Based on IBM IBV analysis.

Action guide

Turning potential into payoff

Agentic AI is ultimately a new way of doing business. Salesforce customers have access to a powerful platform tool to harness the power of AI agents. But outcomes are earned, not given. Unlocking the full ROI of agentic AI demands a strategic reimagining of how data, systems, and people work together.

For enterprises willing to invest in the effort, the payoff is significant: seamless customer experiences, operational efficiency, and innovation at scale. For everyone else, even the most advanced AI agents will perpetually fall just short of true impact—full of promise, but unable to deliver the transformative outcomes executives expect.

Here are three actions that can help you convert potential into reality.

01

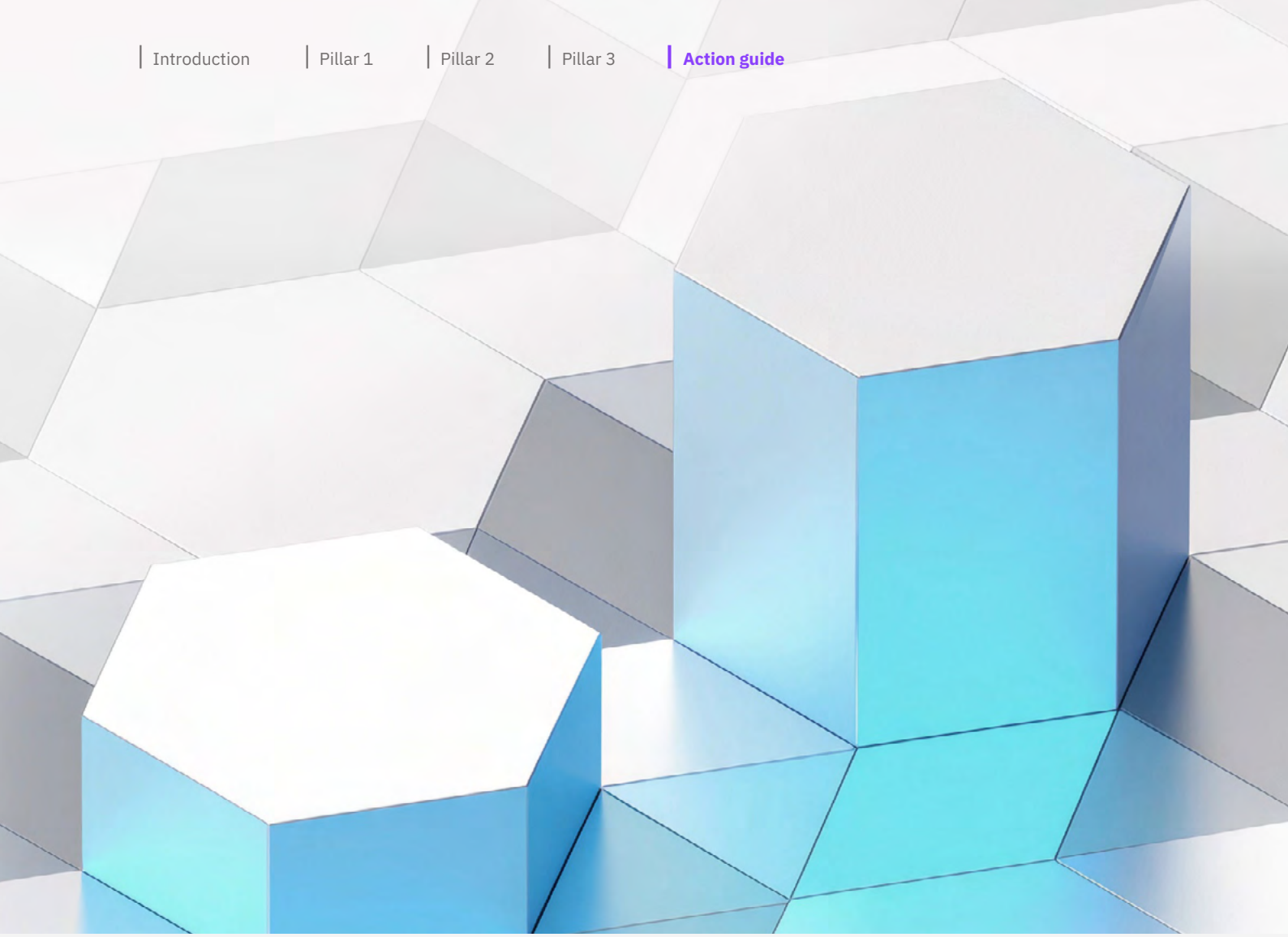
Make ROI a prerequisite—not a postmortem.

Review your AI portfolio to identify initiatives that deliver the strongest returns for customers, employees, and the business, and start with sales, customer service, or IT security for agentic use cases. Establish a standardized framework baseline performance before deployment. Measure ROI after deployment, factoring in risk-adjusted business benefits as well as data usage and effectiveness. Launch initiatives quickly to test, reassess, and mitigate risk, creating a cycle of rapid learning and optimization. By orchestrating agentic AI for both user value and business outcomes, organizations can optimize portfolio returns and accelerate results.

02

Elevate risk management from checkbox to growth enabler.

Embed governance throughout the AI lifecycle. Integrate governance checkpoints across the entire AI journey—from initial design and training to deployment, monitoring, and scaling. Create cross-functional governance teams that include both technical and business stakeholders to provide balanced decision-making about AI agent risks and benefits. Implement continuous monitoring tools that provide real-time visibility into AI agent activities and decisions, and assign accountability, enabling proactive risk management. Use strong governance as a competitive differentiator to confidently scale AI faster, with trust intact.



03

Leave no data behind.

Mine your systems for data to fuel agents with a comprehensive customer view. Go beyond basic integrations by designing a composable strategy that simplifies architecture, consolidates platforms, and tightly aligns Salesforce with core enterprise systems and data infrastructure. Leverage zero-copy integration and data fabrics to reduce latency, avoid costly duplication, and accelerate agentic AI readiness. Thoughtful integration unlocks richer insights, improves accuracy, speeds decision-making, and drives measurable cost savings—without expensive rip-and-replace projects.

Authors

Tim Elcott

Partner, Salesforce Go-to-Market Leader,
UKI Salesforce Practice
IBM Consulting
linkedin.com/in/timelcott/
tim_elcott@uk.ibm.com

With over 30 years of experience, Tim drives agile, AI-powered transformations that deliver measurable client outcomes. He combines strategic vision with hands-on expertise to shape, sell, and deliver complex projects.

Nisha Kohli

Global Research Lead,
Customer Experience Transformation
IBM Institute for Business Value
linkedin.com/in/nishakohli1/
nisha.kohli@us.ibm.com

With 10 years of experience in product management and strategy, Nisha leads customer experience transformations that connect strategy, design, and technology. She partners with clients to reimagine how digital products serve customers, employees, and the business—delivering streamlined experiences that drive growth.

Mary Rowe

Senior Partner,
Global Salesforce, Service Area Leader
IBM Consulting
linkedin.com/in/maryfrattorowe/
mary.rowe@ibm.com

Mary is an accomplished executive with over 30 years of experience in scaling customer relationships, driving growth, and leading global technology organizations, including key roles at Salesforce, Yext, and Accenture before joining IBM. She leverages her deep expertise in Salesforce to help clients navigate digital transformation and complex industry challenges.

Srinivas Rudrabhatla

EMEA Partner,
Salesforce Service Area Leader
IBM Consulting
linkedin.com/in/srinirudrabhatla/
srinivas.rudrabhatla@ibm.com

With 25 years of industry and consulting experience in sales, service, marketing, and commerce, Srini has worked in leadership roles with multiple organizations in the EMEA region. He is passionate about helping organizations in strategic transformation and change. Srini is recognized for his experience in customer relationship management, consumer experience, and AI, bringing a human-centric mindset and deep expertise in industry processes, delivery, and technology platforms.

Contributors

Bethany Perkins
Former Go-to-Market Strategy Leader

Cody McKinney
IBM CHQ Marketing

Arvind Raj
Strategy and Transformation Consultant
IBM Institute for Business Value

Sara Aboulhosn
Associate Creative Director,
IBM Institute for Business Value

Benjamin Hurte
Design Director, IBM Consulting

Joanna Wilkins
Editorial Lead, IBM Institute for Business Value

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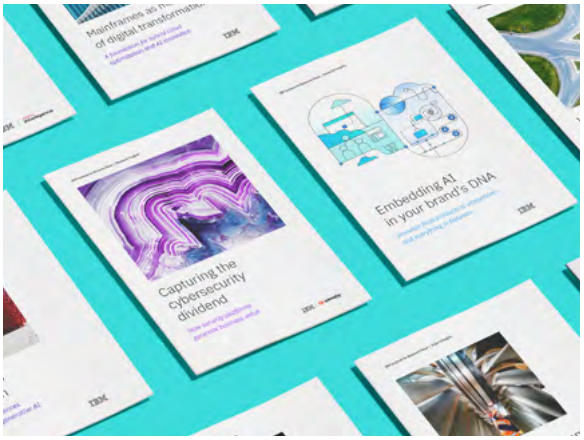

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Study approach and methodology

The IBM Institute for Business Value (IBM IBV), in cooperation with Oxford Economics, conducted a global survey in the second quarter of 2025. The survey targeted Salesforce customers—with a total sample size of 1,222 respondents. The study spanned 23 geographies, maintaining proportional geographic representation. It included leaders from 22 industries, such as manufacturing, retail, IT services, as well as state and federal governments, and featured a mix of B2B (51%) and B2C (49%).

The study covered several key areas, including demographics, organizational performance, strategic priorities, data connectivity to Salesforce, AI adoption and expectations, as well as operational challenges. The survey also explored how companies manage change, AI/agentic AI investments, and make decisions. Additionally, it assessed leadership approaches, talent strategies, and cultural readiness for transformation, as well as collaboration efforts and regulatory concerns.

The analysis of the 2025 Salesforce survey includes a robust mix of quantitative and analytical methods to uncover meaningful insights. Quantitative analysis begins with descriptive statistics—such as means and frequency distributions—to summarize key themes and technology adoption rates across the sample.

To uncover the true drivers of performance, we created a composite index based on key capability areas that map to three themes ("Connect," "Optimize," and "Govern"). The underlying variables were selected through both theoretical and empirical justification, chosen for their alignment with core digital transformation constructs and their strong correlations with financial KPIs such as revenue growth and profitability. We then applied advanced analytics, including correlation analysis, to examine the relationship between these capabilities and business outcomes. To deepen our insights, we segmented the composite score into quintiles, which allowed us to explore how organizations in the top quintile differ from others and to identify the practices most strongly associated with high performance. Each quintile was additionally normalized by annual revenue size.

Respondents by industry

Manufacturing/Industrial Products	**8%**
Consumer Products	**7%**
Telecommunications	**6%**
Energy and Utilities	**6%**
Retail	**6%**
Life Sciences/Pharmaceutical	**6%**
Healthcare Providers	**6%**
Travel	**5%**
Transportation/Logistics	**5%**
Media and Entertainment	**5%**
Software	**5%**
Banking	**4%**
Electronics	**4%**
Insurance	**4%**
Automotive OEM	**3%**
Automotive Suppliers	**3%**
Chemicals	**3%**
Financial Markets	**3%**
Government Federal/National	**3%**
Government State/Provincial	**3%**
Petroleum (inc. Oil and Gas)	**3%**
Professional Services	**3%**

Respondents by country

US	**25%**
UK	**10%**
Japan	**9%**
Australia	**5%**
Canada	**5%**
France	**4%**
Germany	**4%**
India	**4%**
South Korea	**4%**
Spain	**4%**
Singapore	**3%**
Switzerland	**3%**
UAE	**3%**
Argentina	**2%**
Brazil	**2%**
China (Hong Kong only)	**2%**
Denmark	**2%**
Mexico	**2%**
Saudi Arabia	**2%**
Sweden	**2%**
Finland	**1%**
Netherlands	**1%**
Qatar	**1%**

NOTE: Percentages may not add to 100% due to rounding.

Notes and sources

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IBM Corporation
New Orchard Road
Armonk, NY 10504

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