



2024 WORKFLOW AUTOMATION OUTLOOK

A path to maximizing tech investments to drive value from GenAI and beyond

2024

A WORD FROM



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Wow, what a year! Now that AI does my job for me, I have so much free time. Ok, not quite. But there were a lot of developments.

As I reflect on the Deloitte Global [2023 Workflow Automation Trends](#), it's clear expectations remain high for improving the management of sustainability and enterprise services. But it was some of last year's other trends—productivity, value delivery, and cost management—that commanded attention amidst economic uncertainty.

Getting the most out of every technology investment was (and is) priority No. 1 for organizations.



**2023 was the year of GenAI.
It's likely that 2024 will be too.**

AI and machine learning have progressed in the background for decades, but last year's advancements changed the conversation—and many organizations' roadmaps. If I could shout it from the mountaintop I would: Leaders should meet this moment, because generative AI is likely to command budget and attention for years to come!

**But there's a balance of opportunity,
risk, and innovation to weigh.**

Don't risk missing the bigger picture with a singular focus on GenAI. Most good business strategies are tied to diversification and mastering the fundamentals—and now more than ever, organizations should look to **deliver enterprisewide wins to support revenue growth, while managing operating margins.** Whether it's protecting your business from cyber risks or **driving efficiency in your core infrastructure and assets**—getting smarter about running your business is a constant requirement.

Businesses came into 2023 with big priorities.

Then, GenAI changed the conversation and strategy.

Now it's driving the future of business.



Sustainability
and profitability
converged



**Enterprise service
management (ESM)**
matured and governance
was elevated



**Tap the human
element of AI**
to build trust and support
around GenAI growth



**Protect data
with confidence**
and proactively
manage cyberthreats



**Cost
management**
was balanced with
a growth mindset



**Innovate your
industries**
to deliver custom solutions
to complex problems



Productivity
rose with
digitization and
automation



Value delivery
was spurred from
tech investment



Generative AI
made its mark and
transformed business
as we know it



**Unlock value from
next generation of
managed services**
to translate today's tech
into ongoing business value



**Invigorate your
digital core**
while shifting to a tech
wellness mindset

A look back to 2023

The trends Deloitte and ServiceNow laid out heading into 2023 shouldn't be left in the past—they're still impacting businesses today. Here's a glimpse into what's stayed true, what's evolved, and what businesses should think about next, including how GenAI can work for *you*.



Sustainability

In the face of new regulation, Gen-Z expectations, and added tax benefits, business and planet goals converged in 2023. And while cost takeout will always be an appealing investment, it could be critical to shore up your company's ability to accurately capture, track, and report data—unlocking the insights that fuel opportunities and efficiencies.

Sustainability should be financially sustainable.



Productivity

As working from home continued in 2023, productivity was top-of-mind. But as hybrid environments prove the most optimal for employees, companies should elevate the experience and engagement in those spaces. One consideration will be to offer a consistent set of the right tools—ones that don't get in the way of working, but make jobs more streamlined.

Meet the hybrid moment to drive efficiency—and the bottom line.



Cost management

There's been a clear increase in cloud consumption. But with the c-suite challenged to correlate it to revenue impact, the need to prove value from cloud is as critical as ever. Understanding cloud investments can turn cloud costs to optimized consumption—bringing businesses closer to their 2024 goals.

Curb costs to unlock margin and investment.



Value delivery

As more has shifted to the cloud, companies face a value conundrum: Are we just implementing technology, or are we optimizing our business? As IP ownership becomes more fluid, it's likely there will be a need to go beyond optimizing within business processes, with cross-discipline processes—uncovering an introspective, end-to-end view into your technology providers to unlock true business value.

Reimagine tech spending.



ESM maturity

Enterprise service management (ESM) has been a focus for years due to its complexity and breadth. For those who only see its internal-facing implications, ESM can open the door for smarter, more informed service delivery. Now, companies can leverage GenAI to anticipate service needs—ultimately impacting client experience, revenue generation, and enterprisewide cost optimization.

Deliver on needs, not requests.

Meet the moment: What GenAI requires of today's leaders

GenAI isn't new. It's an evolution of decades of work around AI and machine learning. And while we've seen the technology hype cycle before—with IoT, cloud, and blockchain—this feels different.

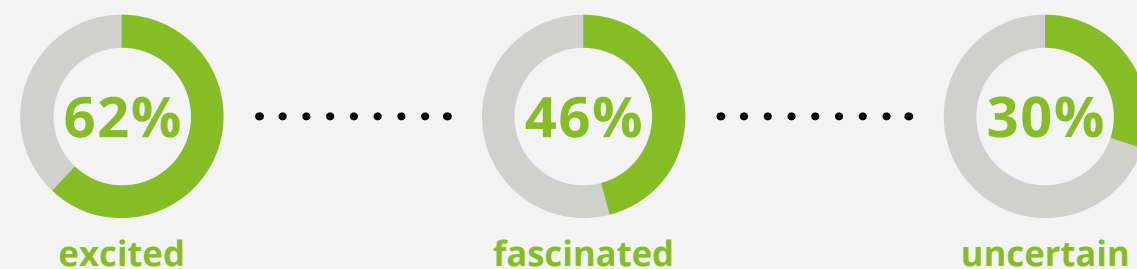


GenAI will likely be a reset moment. The technology is moving fast—and the potential business benefit is expected to grow.

Those who start now and make the right moves can meet stakeholder requirements, while gaining a competitive advantage. Those who try to wait it out or don't build an intentional strategy might get left behind.

How can early adopters avoid the hype—discerning which moves will drive value, and which are just noise?

Deloitte surveyed 2,800 leaders at AI-fueled organizations and found that many feel optimistic about GenAI's potential, and are on the verge of scaling up their efforts.



[Access more AI insights from Deloitte's AI Institute](#)

You can't be everywhere at once. We see opportunities to make smart moves on five fronts.

- 1 Tap the human element of AI**
Rally stakeholders behind your GenAI strategy
- 2 Invigorate your digital core**
Proactively scale while avoiding tech sprawl
- 3 Protect data with confidence**
Manage risk and defend privacy to build trust
- 4 Innovate in your industry**
Address complex and unique use cases
- 5 Unlock the next generation of managed services**
Translate today's tech into ongoing business value

1 Tap the human element of AI

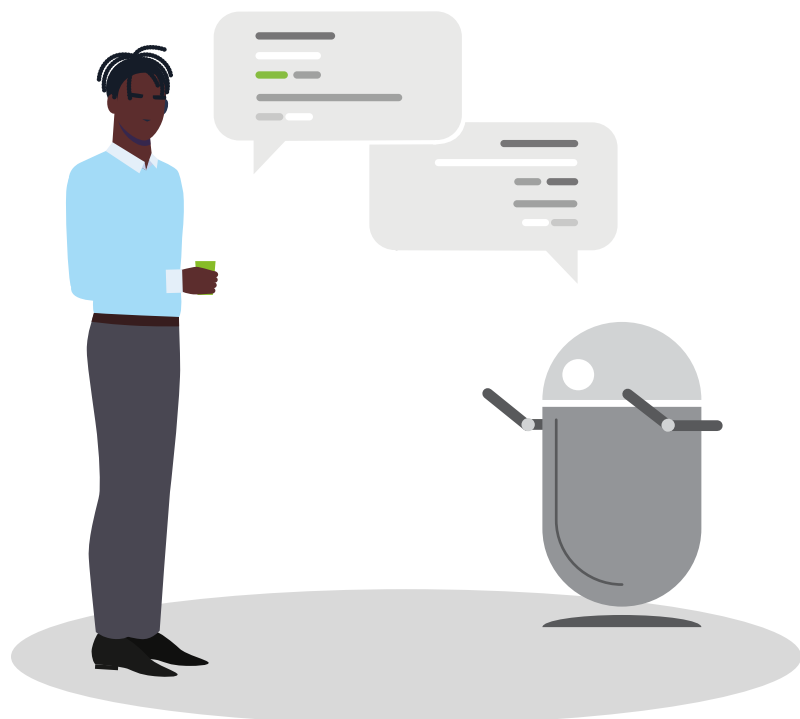
GenAI has caught everyone's attention, and its success will likely be highly dependent on the *human* capabilities to work with it.

Your stakeholders are watching (and waiting) for impact. Seventy-nine percent of CEOs are looking to GenAI for increased efficiency and more than 50 percent want its help with new data capture and more growth opportunities.



GenAI isn't a crash diet to slim workforces and cut costs. But as you pilot the technology for growth, you'll be presented with ways to reskill and redeploy your existing human capital.

So, as your stakeholders look to you to guide them on the impacts and opportunities it presents—take this opportunity to be their trusted advisor and address their top concerns with a focus on trust and transparency.



Key stakeholders to engage:



Investors and analysts



Board members



C-suite and management



Employees



Customers

“Organizations want to see the transformative potential of generative AI—we're excited about the opportunities to 'put AI to work' for both efficiency and transformation. Still, risk remains at the top of the board agenda, so we also are watching how it impacts the threat landscape.”



Larry Quinlan, member of multiple boards, including ServiceNow

The moment for the GenAI revolution is here. How will you meet it—and your stakeholders?

Investors and analysts

Investors face a GenAI conundrum. Inaction has potential repercussions, and it's important to forge the right path. They expect you'll seize this moment to accelerate growth aspirations.



Build their confidence in your strategy. Show how it stacks up against moves competitors are making. Point out where you're tapping outside expertise and show how you're managing risks in your plan to get one step ahead.

C-suite and management

Most aren't AI experts, but this moment calls for quick immersion. They're assessing the impact across their value chain—from operating to delivering for customers, employees, and investors. They're also considering implications for pricing, talent procurement, M&A, ecosystem partners—and which use cases will have the most impact for the lowest cost.



Rally the best thinking to help build the roadmap. Cultivate a realistic view of where GenAI can drive efficiencies to help set expectations. Examine the impacts on your growth strategy and temper board fears with how you'll govern growth and tap humans to keep AI in check.

Employees

The big question is: What does this mean for me? Employees want to know if their job is secure and how an AI-enabled workforce can allow them to do the work they want to do.



Demonstrate how GenAI can make their job easier and more supportive by automating repetitive tasks and letting them focus on their most important work. Then, show employees how it can accelerate their career ambitions, including educational opportunities to build new skills.

Board members

Board members want to buy into the GenAI hype. They want assurances there is governance in place to prevent unintended consequences—e.g., data risks, model bias, and AI hallucinations—that could put the brand or investments at risk.



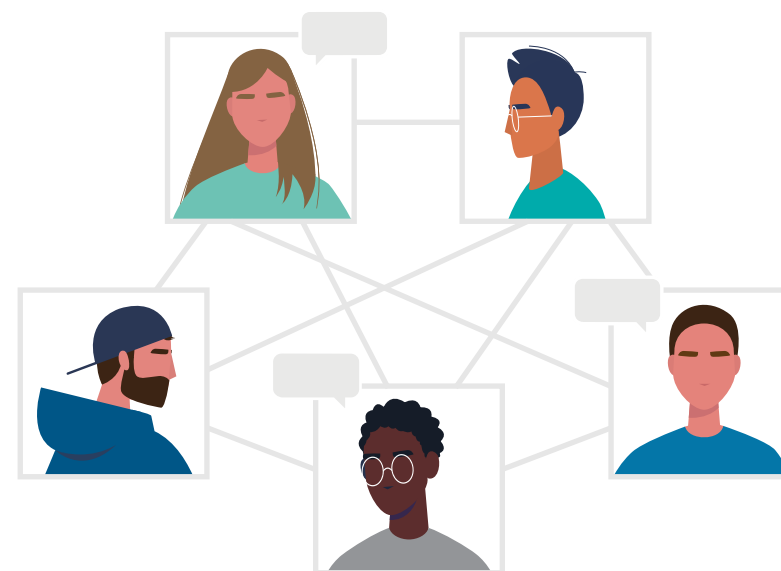
Go beyond speculative visions to demonstrate how seriously you're taking this market moment. Explain how GenAI won't be left unchecked and show how you're defining and navigating the changing landscape—particularly regulatory and competitive shifts.

Customers

As businesses roll out GenAI strategies, customers may wonder how it will impact their own engagements. They'll likely want to understand how and where it can have the greatest impact from end-to-end for their specific use cases.



Set the tone about the value GenAI adds to your products and solutions—like sustainably better, stronger, and faster delivery. Then, build confidence in data security by getting appropriate consent and explaining how you'll protect their data, all while improving their overall consumer experience.



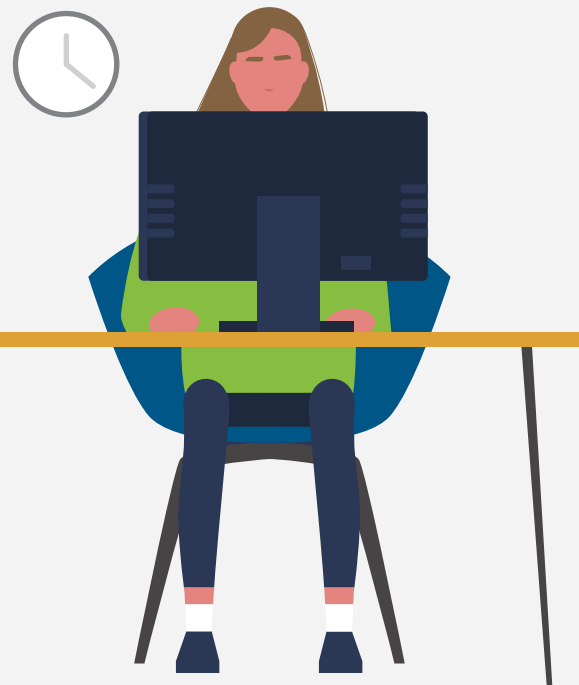
2 Invigorate your digital core

Today's GenAI enthusiasm comes at a time when businesses are looking to intentionally manage digital sprawl, not expand it. The key will likely be in how you navigate and prioritize the modernization of your technology infrastructure, systems, and tools.

While the 'if it's not broken, don't fix it' adage often prevails, there's a new mindset emerging—one that shifts from tech debt to tech *wellness*.




Just like human health care, preventative methods are becoming the norm. Not only can we diagnose problems sooner, but we can help prevent them altogether. In business, proactive monitoring tied to risk management and a natural cadence of operational upgrades isn't just better for organization dynamics—it could result in long-term savings and value creation.



Modernize your ERP core

Your enterprise resource planning (ERP) system is an organizational backbone. For companies going on multiple cycles of upgrade deployments and still finding the value equation elusive—GenAI can offer a better way. Renovate your ERP core with AI capabilities built to optimize code, identify bugs and diagnose technology debt at speed and scale.

Take your ERP to the next level 

Key actions you can take today



Unify disparate technology

Prepare for a future enabled by GenAI by taking an enterprise technology view—one built to experiment at the edge, but with a path to integrate and scale. Connect back, middle, and front offices with a platform designed to serve as a unifying layer across disparate technologies and drive action between them.



Build an AI center of excellence

AI resources are limited, and expensive. For some companies, it might make more sense to build a center of excellence (COE)—one designed to centralize expertise, work through priority use cases, and then deploy across the enterprise in the most ethical, trusted, and technically sound way possible.



See beyond disruption

Move beyond reactive problem solving by leveraging source data from your ERP to manage issues before they become turbulent. A proactive approach to identifying and solving problems will not only increase your competitiveness, but give your team time back to do more important work.



Optimize transformation value

It can be challenging to keep large-scale projects on track, while mitigating risks and realizing the intended value. Deloitte's Intelligent Delivery Platform (IDP) offers a single way to manage transformation initiatives by standardizing the best of what organizations already use, and optimizing the delivery of personalized experiences.

Uncover how.

3 Protect data with confidence

In this high-visibility moment, many of the topics stakeholders are grappling with come down to one word: Trust.

Large language models (LLMs) and other types of GenAI are becoming more proficient at processing and understanding data—and turning it into human-like content. And there’s no single LLM or platform to rule them all.



LLMs can also bring big physical and virtual risks combined with the potential added threats employees can face while outside your organization’s secure environments.

So how will your organization rely on the right data to build trust and deliver value? How will you tap technology to create a security blanket for your entire organization?

To prepare for a bold future with GenAI, enterprises need approaches that are robust, reliable, safe, and respectful of privacy.



Lead the cybersecurity charge

It is not up to one role to improve technology and risk resiliency. Organizations should tap into different expertise that secures each area of their risk portfolio. With cyber and strategic risk solutions from Deloitte, leverage a lattice network of support with professional knowledge focused on defeating adversaries and delivering resiliency.

Defend the enterprise

Key actions you can take today



Tap trusted information

Build a foundation of trust by training your LLM on accurate data and knowledge. *Now* is the time to digitize processes and cleanse your data to ensure your organization has reliable information to set you up for success.



Enhance organizational reputation

Develop GenAI capabilities in a controlled and risk-managed way that allows leaders to see opportunities, unlock business value, and build trust throughout the organization—all leading to an enhanced organization reputation.



Stay ahead of adversaries

Your ability to design for resilience and create secure work environments is paramount. Tap technology and human intelligence services for the advanced threat detection needed to proactively monitor, spot, investigate, and respond to cyberattacks.



Promote ethical use

Prepare for an unknown regulatory climate by educating employees on best practices in handling data, ensuring privacy and security, and adhering to ethical guidelines. This will not only help to safeguard sensitive information, but also promote responsible and ethical use of AI. **Tap into the TrustworthyAI™ framework to guide your journey.**

4 Innovate in your industry

Much of the early buzz around GenAI focused on consumer use cases. But unlike consumers, enterprises have complex and specific needs around security, customization, and ROI.



The earliest use cases that meet those criteria have been more general, like writing knowledge-based articles or summarizing chat logs. However, as the technology advances, there's significant opportunity for industry-specific use cases.

We're already seeing evolving results around:



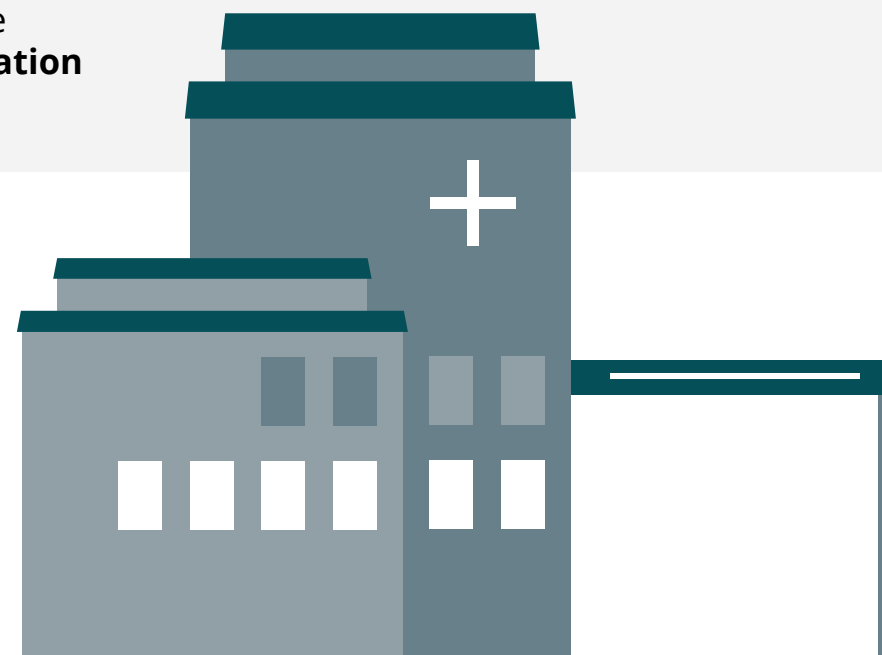
Relieving clinician burnout in **health care**



Resolving supply chain disruption in **manufacturing**



Simplifying knowledge management in **education**



Health care

One of the most prominent challenges is freeing up time for patient care. Clinicians struggle with chronic burnout and jobs that feel unsustainable. They're bogged down with unnecessary and low-value tasks that take time away from patient care.

GenAI could reduce those administrative burdens and eliminate repetitive tasks. ConvergeCare from Deloitte and ServiceNow already taps GenAI technology to streamline clinical workflows.

With ConvergeCare, health care providers can:

- Automate task delegation based on staff availability, roles, and proximity
- Support automated triaging and allocation of medical equipment
- Digitize paperwork and automate the transfer of information to the appropriate areas

66 *Health care has a workforce that doesn't seem to be growing at the same rate as the demand requires. It's taken us into an area where we really do need to start seeing the efficiency gains of digital health."*



Adam Brand,
Gold Coast Hospital Medical Director

as shared in the [Work Re-architected video series](#)



Manufacturing

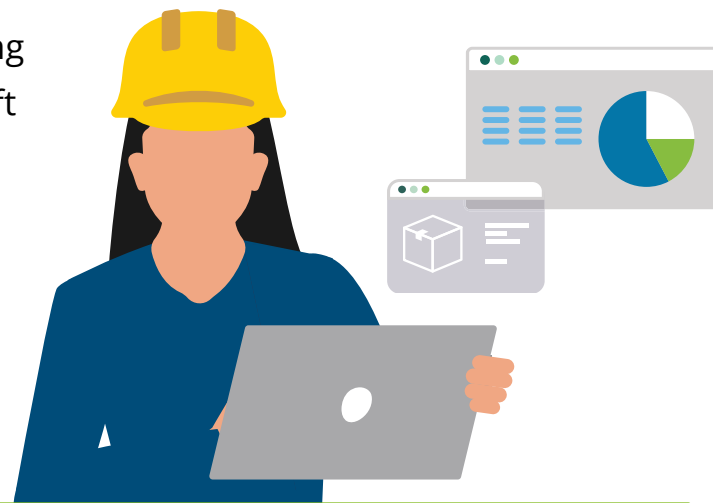
GenAI has applications across the entire value chain—and could help manufacturers unlock significant value from existing investments—from optimizing equipment use to increasing overall revenue opportunities.

Take one of the most pressing challenges today: The supply chain. Manufacturers should confront every stage of the lifecycle, while maintaining reputational excellence.

And while manufacturers' supplier management teams are often bogged down by day-to-day management, creating enterprisewide, proactive solutions can lift organizations from just doing business to expanding business.

Deloitte and ServiceNow are tapping GenAI to solve this problem, with new capabilities that:

- Build custom LLMs
- Automate 20 to 30 percent more requests from suppliers and logistics service providers
- Free up their team's time for the most complex supply chain issues



66 *GenAI has the power to transform the automotive industry, revolutionizing the way we design, manufacture, and experience mobility. As a founding member of the KI Park, Deloitte works alongside industry leaders like Volkswagen and Schaeffler to harness the power of AI—creating industry use cases that accelerate innovation and make bold moves towards a stronger future.”*



Steffen Legler,
KI Park board member, Deloitte Germany & Central Europe Ecosystems & Alliances Leader



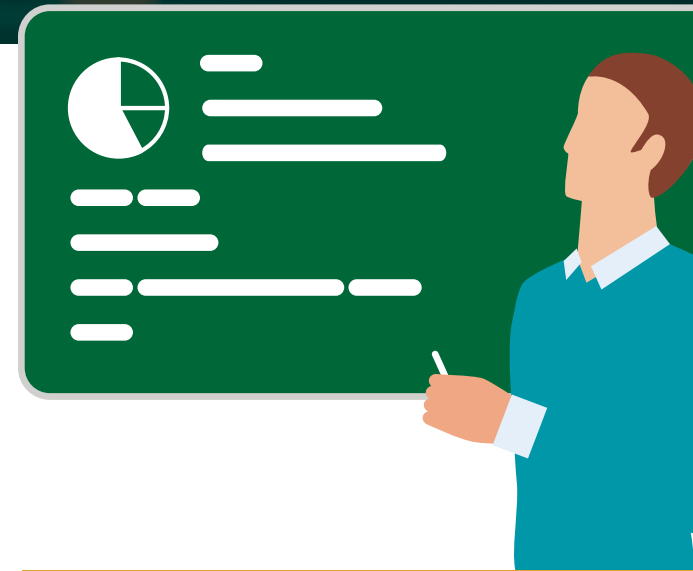
Education

Education leaders can feel their institutions are falling behind when it comes to transformation. GenAI has the potential to help close gaps.

For example, take knowledge management. Universities have a wide set of stakeholders with endless questions and requests: current students, prospective students, alumni, faculty, staff, and donors.

It's hard to anticipate and create articles for all possible inquiries, leading to a reliance on phone, email, or physical 'helpdesks'—which can be frustrating for users and hard to scale.

GenAI tech could help, but many tools don't meet institutions' privacy, compliance, or brand voice



requirements. That's why Deloitte built institution-specific GenAI tools within ServiceNow that can:

- Identify questions not covered by the current knowledge base
- Develop draft articles for knowledge gaps using connected topics
- Provide editing and content ideas as experts refine the articles

66 *GenAI has tremendous potential for higher education. Within two weeks after one of our clients received early access to new capabilities in ServiceNow, we were able to show them how to make knowledge management faster and more efficient. It's an exciting time, and we know clients are just scratching the surface of what's possible.”*



Sam Herring,
Senior Engineering Lead, Deloitte

5 Unlock value from next generation of managed services

Challenging market conditions and siloed operations across enterprise functions are causing a lack of agility and loss of productivity for organizations. With the help of next-generation managed services, they are handling ongoing operations while assessing how GenAI and other technologies can offer a competitive edge and accelerate their transformation agenda.



Organizations want to simplify their technical footprint and extend the value of their investments, moving from a focus on simple task completion and cost reduction to outcome-oriented, innovation-driven engagements. And enterprises are unlocking new value from the strategic technology enhancements and ongoing advisory and analytics they receive as part of this next generation of managed services.

Here are a few services companies are successfully outsourcing:

-  **Operations + IT + Digital**
Strategically manage and enhance technology applications and leverage advanced AI tools for ongoing operational analysis and insights to drive long-term value.
-  **Cyber + Risk**
Enhance your security with market-leading threat hunting, detection, response, and remediation capabilities.
-  **Supply Chain**
Achieve end-to-end supply network resiliency through enhanced intelligence, monitoring, and management of supply chain operations.

How to gain a competitive edge today

Organizations are looking to professional services providers like Deloitte to embed the right mix of critical skills, industry experience, and proactive knowledge of emerging trends and risks into the heart of business operations.

With Deloitte's managed services—known as Operate—customers can more easily manage ongoing operational and technology needs through strategic enhancements to technology applications, cloud, and infrastructure, while also accessing ongoing advisory, data, and analytics services. Combining ServiceNow's GenAI capabilities with Deloitte Operate services enables organizations to realize more efficiencies and advance their business transformation agendas.

66 *Deloitte's commitment to enhance their service offerings with ServiceNow's Now Assist generative AI capabilities demonstrates its market-leading innovation on behalf of customers around the world. This kind of co-development creates a fly-wheel effect for businesses—more use cases drive more workflow automation. Together, ServiceNow and Deloitte can deliver superior digital transformation to help customers in every industry improve their business."*



Bill McDermott,
Chairman and CEO, ServiceNow

As shared in the [Deloitte and ServiceNow Now Assist Press Release](#)

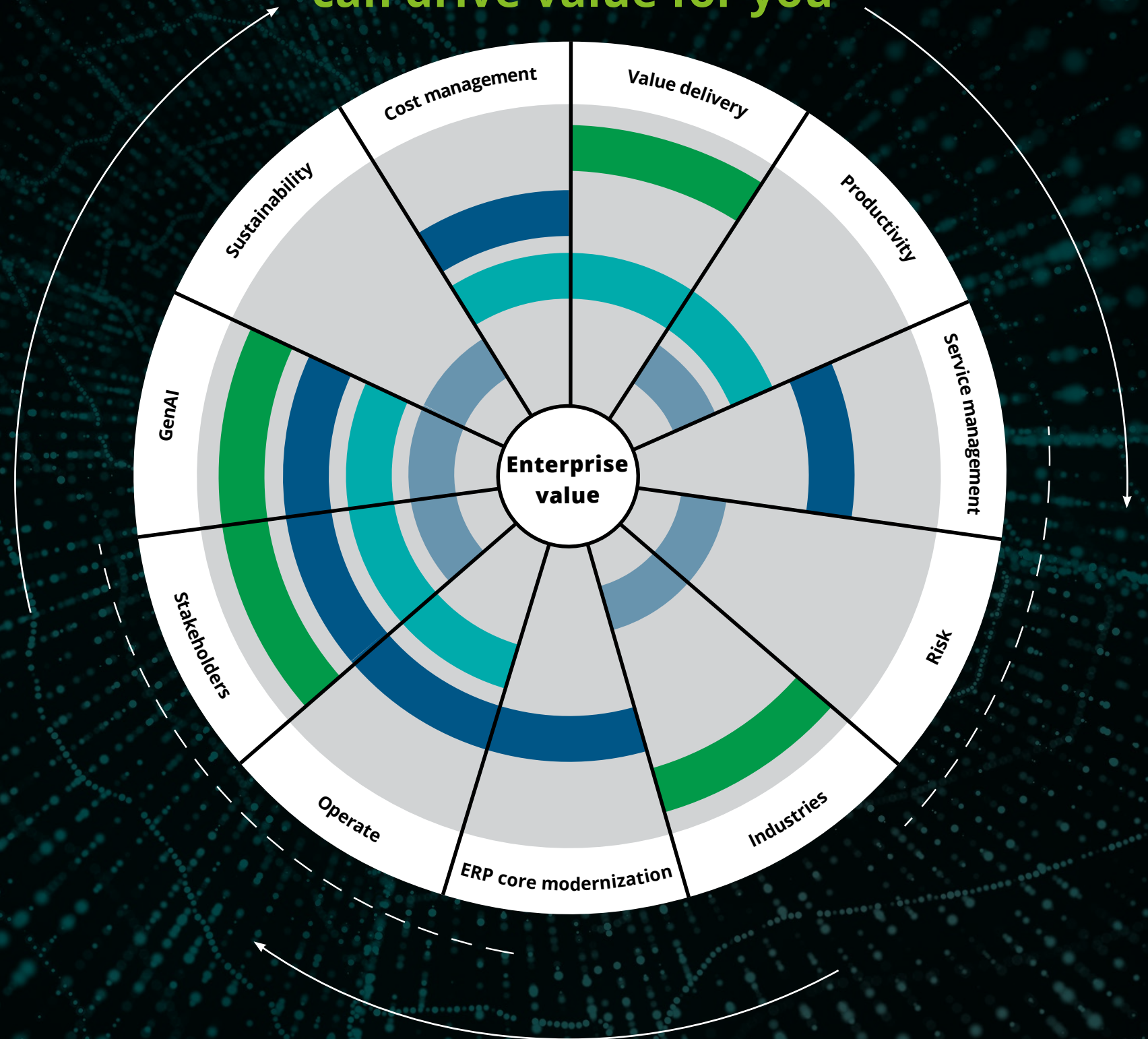
The energy around GenAI is undeniable, but the value isn't guaranteed.

It's going to take vision and work to realize the potential—and its value may come in waves. Those who rise to the moment can set themselves and their business apart.

To unlock the business of value of GenAI, organizations are going to need to do a lot of things right. They need the right strategy. They need to execute it. And, they need an ability to manage the new landscape with operating models that can turn expected benefits into real change.

The trends and topics covered in this outlook each play a role in creating sustainable, long-term value across the enterprise, as shown in this value map.

See how these trends can drive value for you



REVENUE GROWTH:

Acquire and retain customers, and strengthen pricing.

OPERATING MARGIN:

Manage expenses, costs, and taxes.

ASSET EFFICIENCY:

Optimize equipment and inventory, and manage payables/receivables.

EXPECTATIONS:

Improve governance, sustainability, and management of other external factors.

Get in touch today

Let Deloitte and ServiceNow help you
unlock business value.



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