

MARKET NOTE

Embracing the AI Vibes at the 2025 AI Forum Presented by Deloitte AI Institute

Jennifer Hamel

EXECUTIVE SNAPSHOT

FIGURE 1

Executive Snapshot: Embracing the AI Vibes at the 2025 AI Forum Presented by Deloitte AI Institute

Deloitte hosted its 13th annual AI Forum at Deloitte University in Westlake, Texas, from October 27 to 28, 2025. The AI Forum gathered more than 200 leaders across business and government entities to discuss a range of AI topics, with a focus on "turning powerful AI vibes into tangible AI value." This IDC Market Note provides key takeaways from the first day of the event in the context of what we observe as evolving customer needs in the AI services market.

Key Takeaways

- AI leaders across different industries are shifting from AI proofs of concept to reimagining entire workflows and subsectors, with governance, security, and data privacy emerging as critical challenges across industries.
- True AI adoption requires behavioral change management, not just digital transformation. Organizations must focus on employee training, data literacy, and reskilling to unlock GenAI's full potential.
- Measuring AI's business impact remains complex, with efficiency gains easier to quantify than broader value metrics. Organizations must align AI investments with their unique missions and goals.
- Agentic AI is driving a fundamental redesign of enterprise workflows and applications, reducing reliance on traditional interfaces and prompting organizations to reconsider packaged software investments.
- At its annual AI Forum, Deloitte fostered open, peer-to-peer dialogue rather than sales pitches, positioning Deloitte as a strategic collaborator that listens and adapts to evolving client needs in the rapidly changing AI services market.

Source: IDC, 2025

IN THIS MARKET NOTE

Deloitte hosted its 13th annual AI Forum at Deloitte University in Westlake, Texas, from October 27 to 28, 2025. The AI Forum gathered more than 200 leaders across business and government entities to discuss a range of AI topics, with a focus on "turning powerful AI vibes into tangible AI value." This IDC Market Note provides key takeaways from the first day of the event in the context of what we observe as evolving customer needs in the AI services market.

IDC'S POINT OF VIEW

Kicking Off with Industry Disruption

In her welcome session, Lynne Sterrett, Clients, Industries, and Insights leader, Deloitte US, noted, "This is a moment for industry," referring to the shift in client conversations from AI proofs of concept to the reimagination of full workflows and subsectors with AI. Deloitte wasted no time getting these conversations started, sending attendees directly from registration to industry breakout sessions, in which Deloitte facilitated discussions about the potential impact of industry disruptors on the enterprise. Participants were given colored stickers and asked to review a handful of disruptors written on large posters around the room, indicating with the stickers whether they thought the disruptor would have a positive, negative, or neutral impact on their industry.

IDC sat in on the life sciences and healthcare breakout, where it quickly became clear that attendees' perceptions of the impacts of industry disruptors varied depending on their subsector (e.g., healthcare provider, pharmaceutical manufacturer), as well as their own organization's experience with AI use cases. Attendees shared a range of initiatives their organizations were working on, but a common goal was using AI to break process silos, such as integrating clinical trials with clinical care to help accelerate the cure of diseases. But governance and data privacy quickly surfaced as challenges, as well as the tension between making workflows "paperless" (which sounds efficient and sustainable) and making them "peopleless" (which has clear risks to be considered, particularly in scenarios involving care delivery and payment of insurance claims). IDC's 2025 *Enterprise Intelligence Services Survey* indicated that matters with security, privacy, and governance are highly common adoption challenges across more industries than healthcare and life sciences. This suggests that similar risk and governance discussions could have been taking place in any of the other breakout rooms, although with a different context and potential solutions.

Getting Real About AI Adoption

The keynote speaker on the first day of the AI Forum was Conor Grennan, chief AI architect at NYU Stern School of Business and founder and CEO of AI Mindset, an AI training consultancy. The theme of Grennan's presentation was "how AI will change the way we do pretty much everything," but he did not show the typical reverence for AI technology that most keynote speakers do at AI conferences. Instead, Grennan urged attendees to question whether what looks like rapid adoption of GenAI tools was true adoption and to think of AI as behavioral change management, rather than digital transformation. For example, Grennan pointed out that the interface of common tools looks very similar to Google's homepage (i.e., a white screen with a single text input box in the middle). Because human brains work off muscle memory and visual cues, millions of users of these tools treat them just like a search engine, and when the results are not exactly what users are looking for, they give up and say the GenAI tool doesn't work. The same principle applies in what Grennan called the "use case trap." He said viewing GenAI through use cases is only good for people that have already adopted AI (and thus have a frame of reference for how to make the use case work for them). Grennan encouraged attendees to start with a three-step framework — learn, execute, and strategize — to help employees change their behaviors and habits to be able to use GenAI to its full potential in life and work.

While the audience of the AI Forum was primarily executives leading AI initiatives at their organizations, it was great to see Deloitte give the keynote spot to a discussion about the impact of AI on human employees. IDC research shows that employees' lack of data literacy and technology skills and fears around job security remain persistent roadblocks to enterprise intelligence solution adoption. According to IDC's 2025 *Enterprise Intelligence Services Survey*, "prompting AI systems/critical evaluation of AI outputs" was the top talent or skill shortage that organizations said they faced to fulfill their enterprise intelligence needs. The same survey showed that 26% of organizations plan to engage external service providers for training and reskilling services to address enterprise intelligence skill gaps among internal staff in the next 18 months.

Measuring Impact and Business Value

One of the consequences of having a workforce that is trained and ready to adopt AI tools like ChatGPT is that someone must pay for the usage of those tools. In a breakout session on measuring impact from AI-powered transformation in terms of tangible financial and operational results, Deloitte leaders opened the conversation with a comparison of two paradoxes. The Solow paradox (aka the "productivity paradox") arises when organizations make IT investments faster than they realize productivity gains, which can happen if those gains either are difficult to measure or require additional changes in processes, skills, and management strategies to unlock the value.

The Jevons paradox refers to the increased consumption of a resource as its use becomes more efficient (originally observed in the context of coal-powered steam engines, now used to argue that as AI interaction costs fall, the volumes of those interactions will increase). But even if tokens become cheaper and AI usage increases, the impact of that increased usage will not be meaningful without business value.

Attendees in the breakout shared a wide range of experiences with measuring AI value. One leader mentioned that her organization struggled to understand the true cost of AI agents because they were so accustomed to quantifying human-based processes (i.e., counting hours and FTEs was easier than calculating the run cost of AI agents in a process). Another person noted that efficiency gains were easier to measure, but the benefits were finite. Many boards want to know what is being done with those efficiencies — more than an hour saved here or there for individuals — to justify the cost of licenses. But then again, as a leader in the healthcare industry pointed out, the reduction in after-hours paperwork, or "pajama time," with AI-based documentation tools can help reduce doctors' cognitive load and improve retention. Also raised was the potential for "double dipping" or attributing performance improvements to AI when they would have resulted anyway from a change in process.

The fascinating discussion could have used much more than the 50 minutes allotted, but it was evident that there is no single agreed-upon method for measuring business impact. IDC survey research shows that, while improving operational efficiency remains the top business outcome that organizations try to achieve with their enterprise intelligence initiatives, top line-influencing metrics such as faster innovation and revenue growth surpassed cost savings in 2025. However, AI's value is truly in the eye of the beholder — it depends on the organization's own mission, goals, and context.

Redesigning Workflows Around AI Agents

Back in the plenary sessions, Deloitte hosted a fireside chat with Aaron Levie, cofounder and CEO of Box, as well as a panel discussion about reimagining enterprise resource planning (ERP). Both sessions emphasized that AI, specifically agentic AI, is different from other technologies in that it may not drive value just by being plugged into an existing process. Levie noted that a "massive context engineering problem" exists when AI agents are introduced into a workflow without appropriate context or guidelines for what they should do or not do. Not only do AI agents need access to the data to which human workers would have had access, but they also have a limited context window (so, unlike human workers, they must be reminded of what their job is). The ERP panel raised a similar tension between the old and new ways of doing things now that AI agents have arrived on the scene: while the foundation of ERP is transaction integrity and preconfigured processes, agentic AI processes need to be designed differently for each organization, particularly as decisions and value streams

evolve to require cross-domain knowledge beyond ERP. This may make it more difficult for organizations to get "fresh, clean, and agile" out of the box, leading some to revisit buy versus build decisions. Still, the message from the panel was "don't try to 'out-ERP' ERP but do try to influence the ERP market."

IDC research suggests that increasing dominance of agents and agent-driven interfaces will reduce reliance on traditional interface and UI design and result in most enterprise applications becoming agent led. According to IDC's 2025 *Future Enterprise Resiliency and Spending Survey, Wave 1*, 83% of respondents believe "AI agents create a new intelligence layer over apps, eliminating barriers to switching between suppliers," and more than 80% believe "AI agents are the new enterprise apps, triggering reconsideration of [their] investments in packaged apps." This shift will clearly disrupt software markets, but services vendors will also need to drive industrialization and establish trust, control, and risk management frameworks that eliminate variability in agentic processes.

Deloitte's Role as a Strategic AI Collaborator

Not a typical vendor event, the purpose of Deloitte's AI Forum was to facilitate an exchange of insights and experiences among the business and technology leaders in attendance. In one-on-one discussions with IDC, Deloitte indicated that it intentionally did not want the event to be about "selling," per se. As such, Deloitte spent comparatively little time talking about itself or its AI service offerings during the event sessions, outside of a solution showcase on the periphery of the dinner on the first evening. In the breakout session about measuring value, Deloitte did speak from its own experience infusing AI into its consulting projects as part of the breakout discussion on the metrics that companies were using to measure AI success, but it came off as more peer-to-peer sharing versus prescriptive advice.

Projecting confidence and skills in a market does not always have to include a hard sales pitch. As "reimagining business with AI" increasingly becomes more than a theoretical exercise, organizations may encounter the very real and often new challenges that come with disruption. These organizations will most likely need strategic collaborators that can meet them where they are in their AI maturity and work with them to navigate the disruption and get to meaningful business value. It helps that Deloitte is a leader in the AI services market, with a vast and growing portfolio of AI-enabled tools, frameworks, and methods to assist clients in achieving sustainable business outcomes through AI and data-driven transformations (see *IDC MarketScape: Worldwide Artificial Intelligence Services 2025 Vendor Assessment*, IDC #US52978525, July 2025). But as Sterrett mentioned in her welcoming comments, "We don't know all the possibilities out there — we're all in the same boat, figuring it out together." At the AI

Forum, Deloitte talked less and listened more, which will help it refine and better position its offerings as its clients' needs continue to evolve over the coming year.

LEARN MORE

Related Research

- *Key Training and Enablement Findings: Enterprise Intelligence Services Survey, 2025* (IDC #US53484225, November 2025)
- *Tech Sector Transformation Series: The Agentic Evolution of Enterprise Applications, 2025* (IDC #US53884225, November 2025)
- *Tech Sector Transformation Series: The Agentic Evolution of Enterprise Services* (IDC #US53885725, November 2025)
- *Market Analysis Perspective: Worldwide Enterprise Intelligence Services, 2025* (IDC #US52792525, September 2025)
- *IDC MarketScape: Worldwide Artificial Intelligence Services 2025 Vendor Assessment* (IDC #US52978525, July 2025)

Synopsis

This IDC Market Note provides key observations from Deloitte's AI Forum 2025 event in the context of evolving customer needs in the AI services market.

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

Global Headquarters

140 Kendrick Street
Building B
Needham, MA 02494
USA
508.872.8200
Twitter: @IDC
blogs.idc.com
www.idc.com

Copyright Notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, and web conference and conference event proceedings. Visit www.idc.com to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit www.idc.com/about/worldwideoffices. Please contact IDC at customerservice@idc.com for information on additional copies, web rights, or applying the price of this document toward the purchase of an IDC service.

Copyright 2025 IDC. Reproduction is forbidden unless authorized. All rights reserved.