

2025 ServiceNow Insight and Vision Report

Recognizing the cloud paradigm shift and leveraging it for business growth

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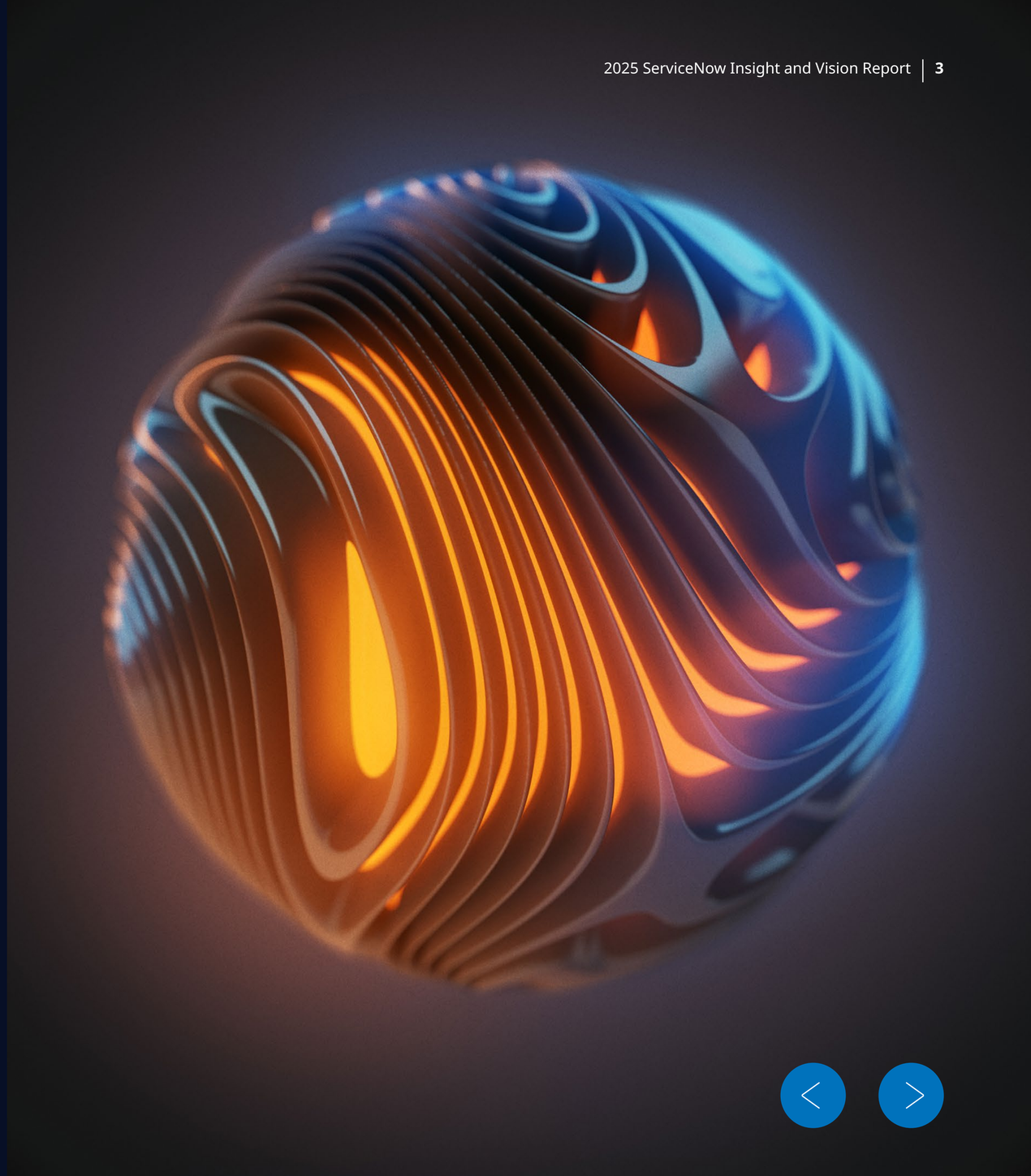

Summary



Summary

Omdia view

Against the backdrop of constantly evolving digital disruptions, businesses are focused on improving operations, realizing new value, and delivering optimal customer and employee experiences. Automation, digital-first collaboration, and AI are all presenting businesses with new and unique challenges and opportunities. Standing still is not an option; businesses must act now and become more digital-centric. Service management practices and technologies are a vital support for business looking to successful deliver against these digital aspirations. The 2025 NTT Service Management Insight and Vision report sheds some light on the critical challenges and opportunities businesses face, and the important role of service management practices and technologies (notably ServiceNow) in addressing these issues.

Digital challenges and aspirations

This year's survey highlights the importance businesses are attaching to AI and automation capabilities as part of their service management and broader digital transformation strategies. Improving operational efficiencies, advancing both employee and customer experiences, and reducing costs by simplifying complex digital ecosystems are all important areas of focus for organizations. However, our survey of service management strategic decision makers highlights the scale of the challenge ahead, especially around the complexity of integrating new technologies with existing systems. Half of the businesses we surveyed identify siloed systems and data as the main barrier stifling digital aspirations and operational efficiencies, with a lack of standardized processes and poor quality of employee services delivered by centralized teams also being notable challenges.

Service management as a catalyst for digital success

Our 2025 study shows how service management capabilities are viewed as critical in helping businesses achieve their digital aspirations and operational realities. At the forefront of enabling what businesses hope to achieve with service management are AI and automation capabilities. Businesses are looking at these technologies to help advance their digital transformations by automating repetitive tasks, evolve employee support, improve decision-making with real-time data and analytics, and by enhancing customer service. However, there is still work to do in advancing maturity here, as only 19% of businesses report that existing service management practices fully align with their digital objectives.

Summary

Key findings

The 2025 survey results highlight the growing importance of automation and AI in service management. Businesses are increasingly realizing the value of these technologies, and of service management as a practice in improving businesses operations, enhancing customer experiences, and advancing employee productivity. However, there are significant opportunities for improvement in aligning service management with digital and business objectives.



Generative AI

Tops the service management investment agenda, with a focus on improving operational efficiency and customer experience.



Automation

Advancing automation in service management is a top priority for many organizations. Maturity here is also improving.



Transformation

Businesses want to improve operational efficiency, enhance customer experience, and support business scalability and growth.



Challenges

The most significant barrier is the complexity of integrating new technologies with existing systems, which affects 41% of respondents.



ServiceNow

70% of businesses advise that ServiceNow adoption has met or exceeded their expectations However, there are opportunities for improvement.



Investments

The majority of businesses plan to allocate 11-20% of their IT budget to service management solutions. ROI indicators vary but they are vital.



Partnerships

Businesses are looking for partners who provide strategic advice, manage systems, and support seamless integrations.

Summary

Introducing the 2025 ServiceNow Insight and Vision Report

Originally launched in 2018, the annual NTT DATA ServiceNow Insight and Vision survey provides a detailed view of the service management challenges and opportunities that organizations are experiencing as they use the platform. The report is developed based on data and insights gathered from real-world business decision-makers who utilize the ServiceNow platform.

Omdia, on behalf of NTT DATA, developed, programmed and fielded a custom, online survey that explored the adoption trends, current state and aspirations, partner dynamics and characteristics relating to service management practices and technologies, and also in the specific use of ServiceNow as a tool in support of these business and digital objectives.

The 2025 iteration of the survey gathers responses from over 1,000 key IT and service management decision makers and budget holders from businesses across seven major countries. Omdia deployed a "double-blind" survey approach, the respondent did not know who was sponsoring the study and Omdia did not receive any personally identifiable information about the respondent.

This report summarizes the results of the survey, highlighting the major trends, current state, and aspirations businesses have relating to service management and the use of technologies that support digital transformation. Generative AI and workflow automation were important technologies explored in this year's survey due to the increased focus and attention both have gathered over the past twelve months by businesses exploring service management capabilities.

The respondents represent a diverse group of businesses, with the largest proportion headquartered in the United States. The majority of respondents work for large organizations, with 41% from companies with 10,000 to 19,999 employees. Financially, the largest group of respondents reported annual revenues between $1 billion and $4.99 billion.

Table 1: Countries with highest percentage of respondents

Country	Percentage of respondents
United States	40%
United Kingdom, Japan, Germany	12% (Second highest)

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Table 2: Percentage of respondents by business size

Business size	Percentage of respondents
1,000 to 4,999 employees	25%
5,000 to 9,999 employees	28%
10,000 to 19,999 employees	41%
20,000 or more employees	6%

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Bridging the gap: Service management must become better aligned with digital objectives

Businesses are increasingly focused on improving customer and employee experiences, realizing new value, and enhancing business efficiencies with service management solutions. Features including AI, automation, collaboration, and low-code capabilities will all be important enablers here, but there are obstacles businesses must overcome. Notably, moving away from siloed digital ecosystems represents a key barrier, with half of the businesses we surveyed identifying this as a key obstacle to service management success. Additionally, overcoming the complexities associated with integrating new technologies will also be important going forward.



Bridging the gap: Service management must become better aligned with digital objectives

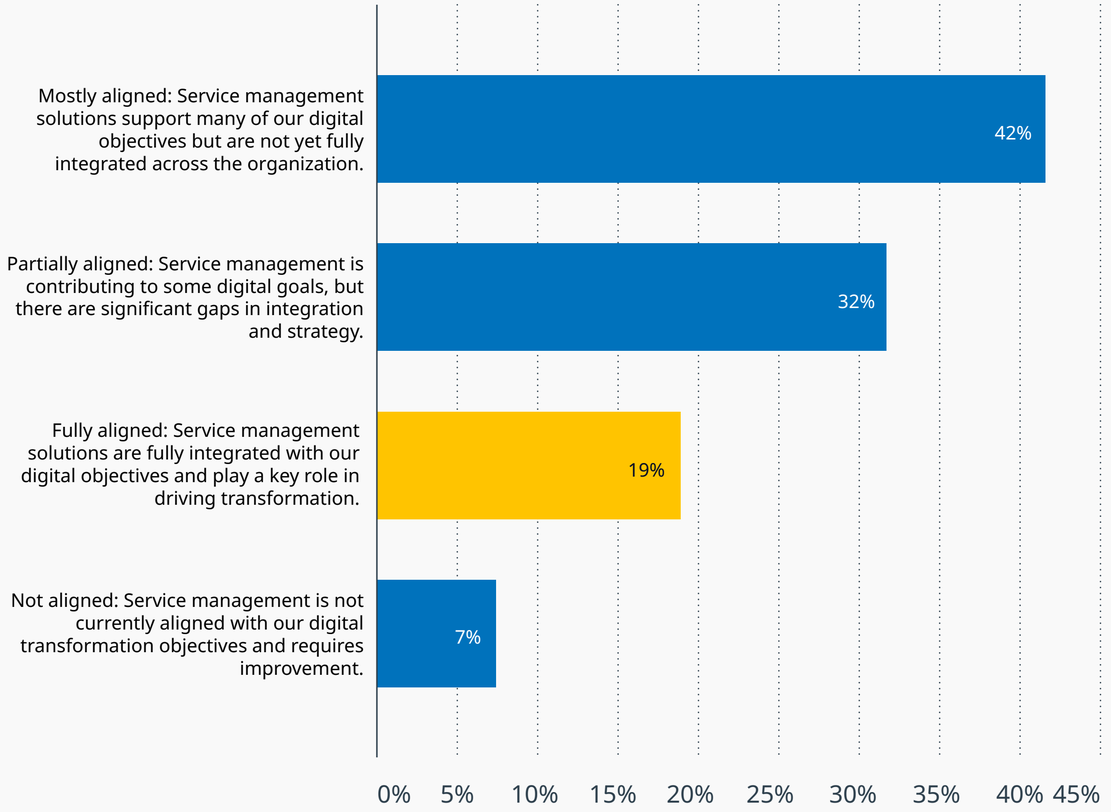
Only 19% of businesses report service management alignment with digital objectives

Businesses still have work to do in optimally aligning service management and digital objectives. Overall, just 19% of respondents advise that service management solutions are fully aligned with their digital objectives. More organizations (42%) characterize themselves mostly aligned, with just 7% advising non-alignment between service management and digital business objectives.

54% of businesses with between 1-5k employees advise service management is either partially or not aligned – more than any other business size.

Overall, these levels of misalignment highlight a critical gap that those delivering and consuming service management capabilities must overcome in advancing digital success.

How do you feel that your current service management tools and practices are supporting your organizations broader business digital objectives?



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Bridging the gap: Service management must become better aligned with digital objectives

Half of businesses identify siloed systems and data as the main barrier stifling digital aspirations and operational efficiency

Respondents highlighted siloed technical systems and data as the most significant barrier to service management and digital alignment, with just under a quarter (23%) of businesses ranking it as their number 1 challenging factor. This highlights the negative impact that fragmented systems and isolated processes are having on technical and business operations. The lack of standardized processes across the business is another major challenge, with 14% of respondents ranking it as a top factor negatively impacting alignment between service management and business practices. This emphasizes how archaic IT and business processes create operational inefficiencies.

Poor quality of employee services delivered by centralized teams (HR, IT, etc.) is also a notable concern overall (2nd most concerning across the top 3 rankings). Businesses indicate that the quality of services provided by centralized teams is not meeting expectations. Finally, a lack of automation that is leading to service delivery inefficiencies is another area that businesses feel is having a negative impact on the alignment between service management and the business.

1 **Siloed technical systems and data**

2 Poor quality of employee services delivered by centralized teams (HR, IT, etc.)

3 Lack of automation leading to service delivery inefficiencies

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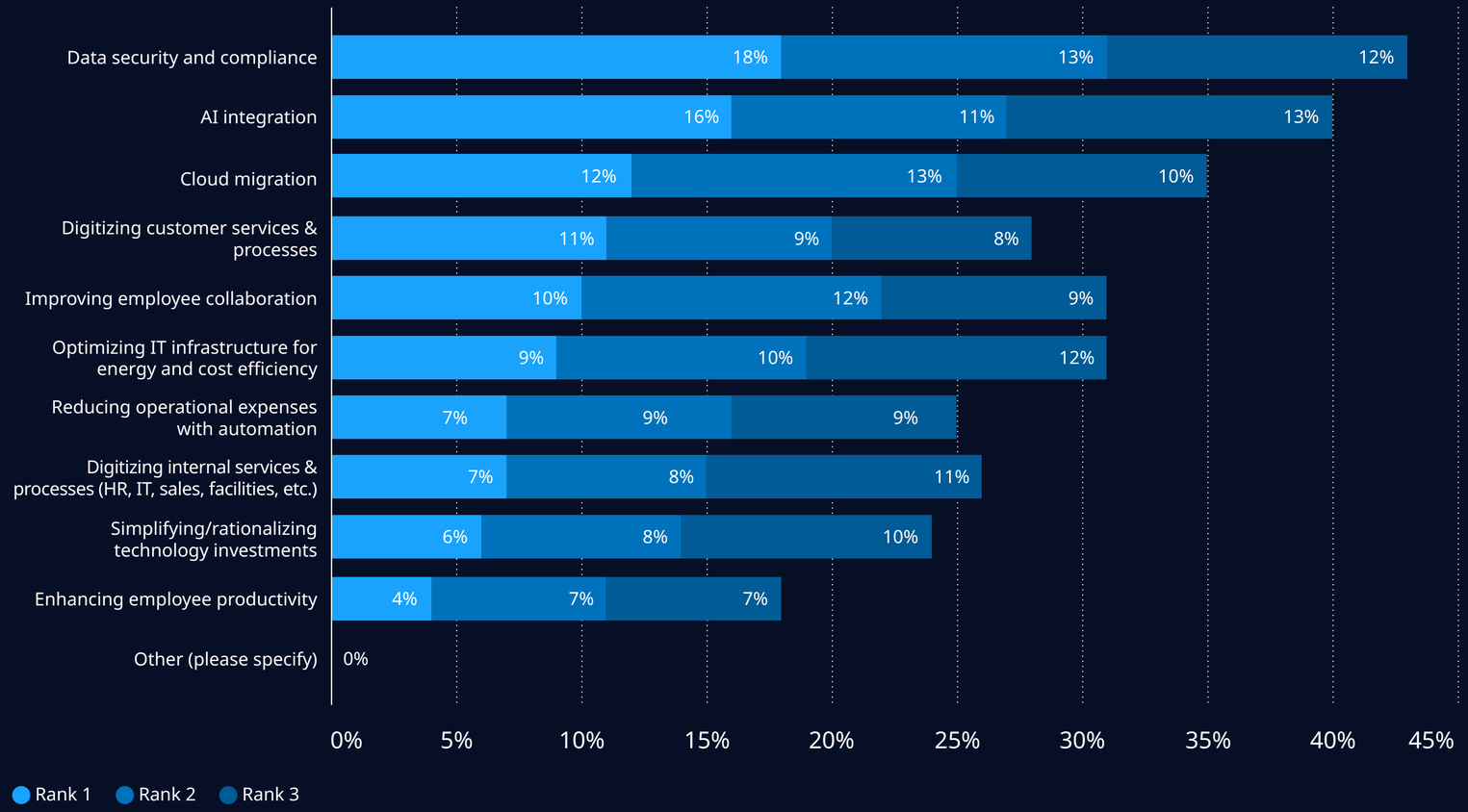
Bridging the gap: Service management must become better aligned with digital objectives

AI and security will dominate the digital landscape over the next 18 months

Businesses highlight data security and compliance as the highest overall digital priority over the next 18 months. AI integration is another digital priority for businesses, as is cloud migration which is also the priority objective for telecom and media businesses.

Other notable priorities include improving employee collaboration (especially in healthcare), optimizing IT infrastructure for energy and cost efficiency, and digitizing both internal and customer services and processes.

What are the top 3 digital/IT priorities for your business over the next 12-18 months?



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Bridging the gap: Service management must become better aligned with digital objectives

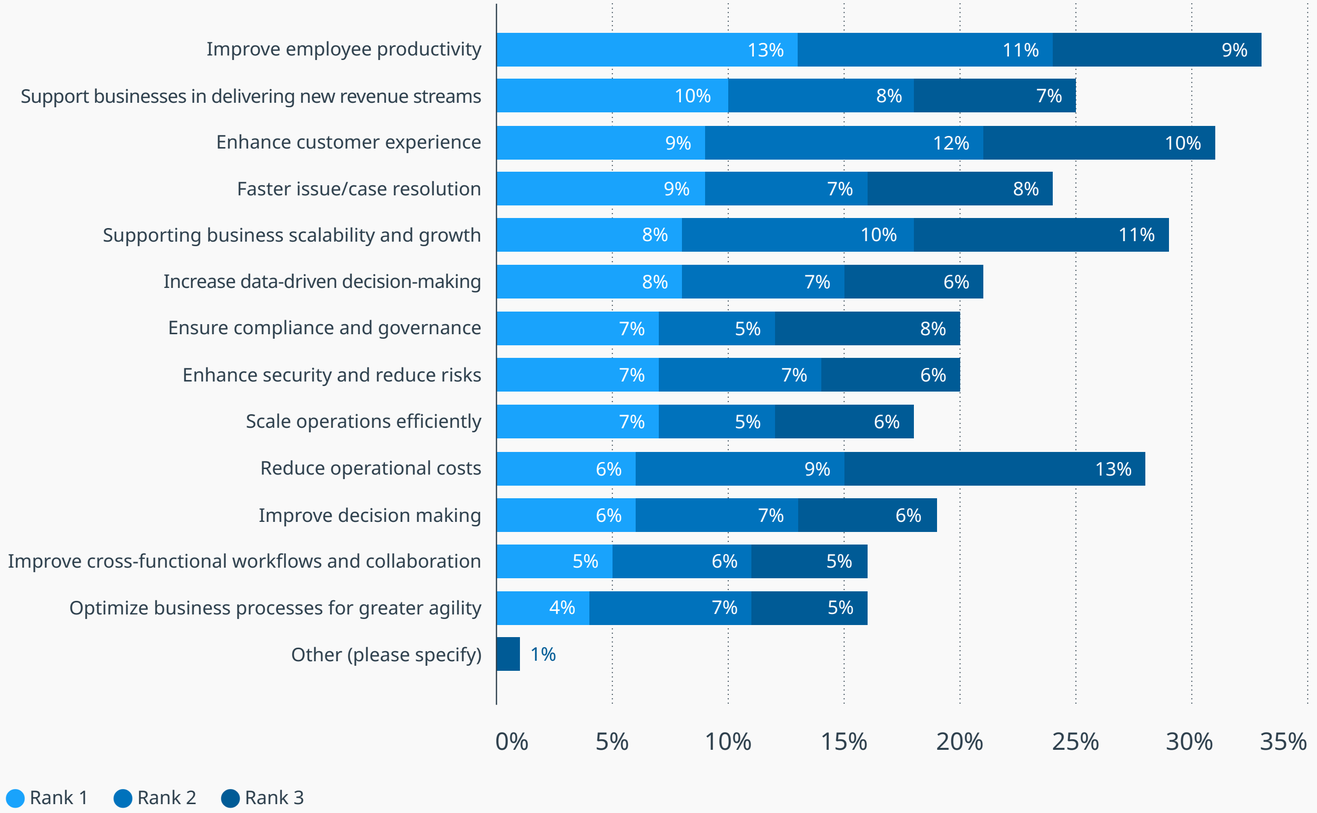
Service management is viewed as support for business growth and scalability

The survey data also reveals several key trends and insights regarding the primary objectives businesses have for investing in service management and workflow automation solutions over the next two years.

Notable here is businesses looking to improve employee productivity with service management. This indicates a strong focus on leveraging capabilities like automation to enhance workforce efficiency and effectiveness.

Supporting business growth and enhancing customer experiences are other important goals, highlighting the need for scalable and agile service management capabilities and approaches.

What are your organization's primary objectives for investing in service management and workflow automation solutions over the next 2 years?



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Bridging the gap

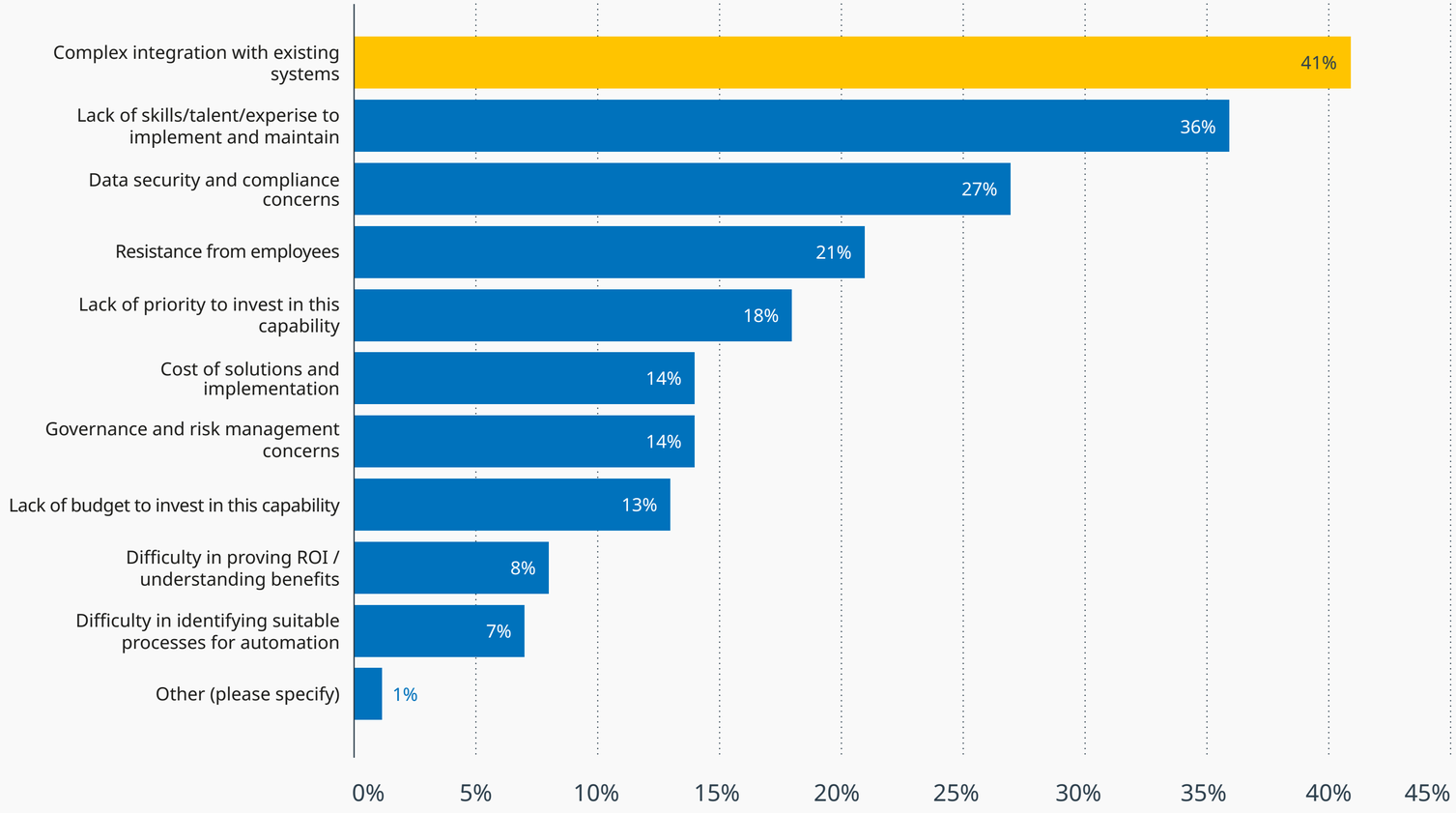
41% of businesses are struggling with complex technology integrations

Tech stack complexity is a real challenge for businesses, and one that impacts the value gained from automation capabilities. Specifically, the 2025 survey shows that complex integration with existing systems is the priority automation challenge that businesses are facing. This highlights how businesses are struggling to incorporate new automation technologies into their current infrastructure.

Businesses also highlight how a lack of skills and talent are impacting adoption of automation. This is especially true for businesses with more than 20k employees where it is the priority challenge.

Data security and compliance concerns with automation capabilities are another notable issue, highlighting the importance of solutions that aid in the safeguarding of sensitive information and supporting the adherence to regulatory requirements.

What are the top 2 biggest challenges your organization faces in implementing new automation capabilities?



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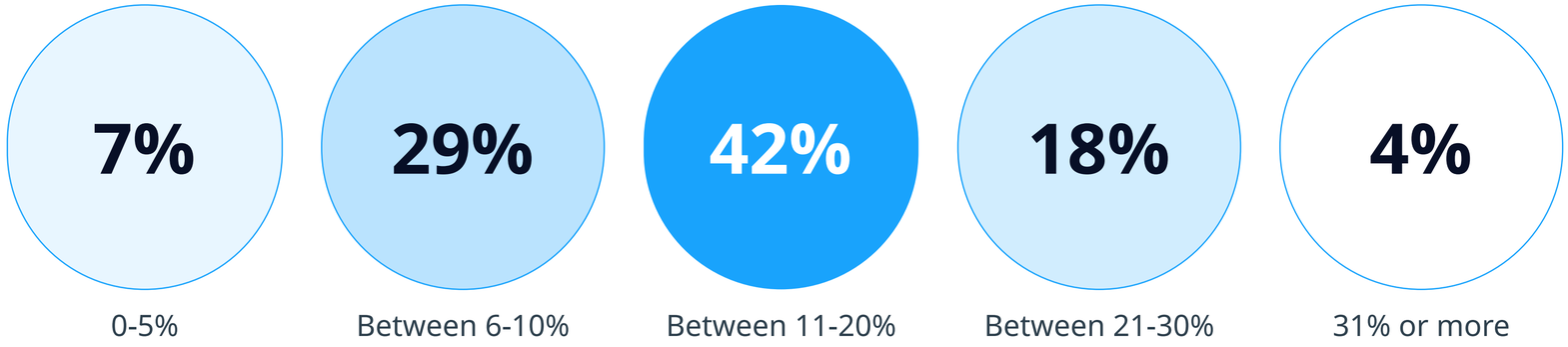
Bridging the gap: Service management must become better aligned with digital objectives

The majority of businesses to allocate more than 11% of IT budget to service management

The largest number of businesses (42%) expect to allocate between 11-20% of their overall IT budget to service management solutions. This reflects the importance of service management solutions in supporting business operations and digital transformation. 36% of businesses plan to invest 10% or lower of their overall IT budget into service management, highlighting an opportunity for vendors and service providers delivering these solutions to better articulate the important strategic value these solutions deliver enterprises.





Aligning service management and digital objectives: Industry perspectives



Banking & Finance

Data security and compliance is the **priority digital challenge**

40% of businesses advise that service management and digital goals are either not aligned or only partially aligned

Leveraging generative AI to improve service management activities is the most important investment factor



Healthcare

Siloed technical systems and data is the priority factor **negatively impacting alignment between service management and business practices**

Just 19% advise that service management solutions are fully integrated with digital objectives and play a key role in driving transformation



Manufacturing

16% highlight AI integration as a digital business priority – second only to data security and compliance (19%)

35% advise that enhancing customer experience will be the primary objective for investing in service management and workflow automation solutions over the next 2 years



Technology

43% identify complex integration with existing systems as the biggest challenges faced when implementing new automation capabilities

41% highlight employee productivity improvements as a top objective for investing in service management and workflow automation solutions over the next 2 years

Generative AI: The future of service management

As is the case across most enterprise and consumer technologies at present, generative AI tops the service management investment agenda for business leaders. Advanced AI and automation capabilities are viewed by business leaders as important enablers of new operational efficiencies and customer outcomes. Supporting business scalability and growth, in addition to enhancing employee productivity and experiences, are other aspirations businesses have when it comes to the adoption of generative AI and automation capabilities in enhancing current service management practices and technologies.



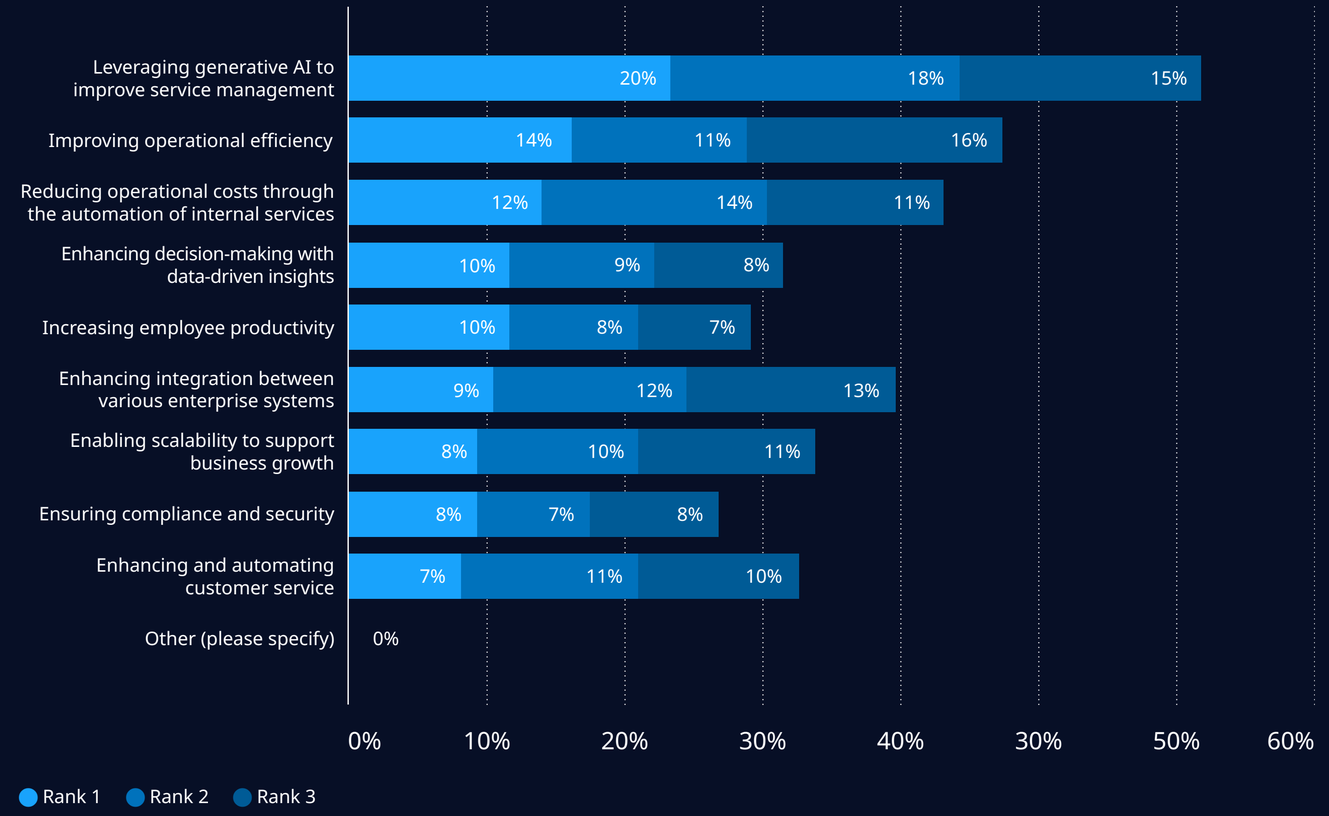
Generative AI: The future of service management

Generative AI tops the service management investment agenda

The survey results reveal that improving service management by using generative AI will be a key element driving further investment over the next 18 months. This highlights the strong business focus on adopting advanced AI technologies to enhance service management processes and outcomes.

Improving operational efficiencies and reducing operational costs are other important priorities. This suggests that organizations are keen on streamlining their operations to achieve better performance and productivity, in addition to realizing new cost efficiencies. Articulating how service management solutions help here will be vital for vendors and service providers delivering these capabilities.

What are the three most important factors that will drive your decision to further invest in service management capabilities and practices over the next 18 months?



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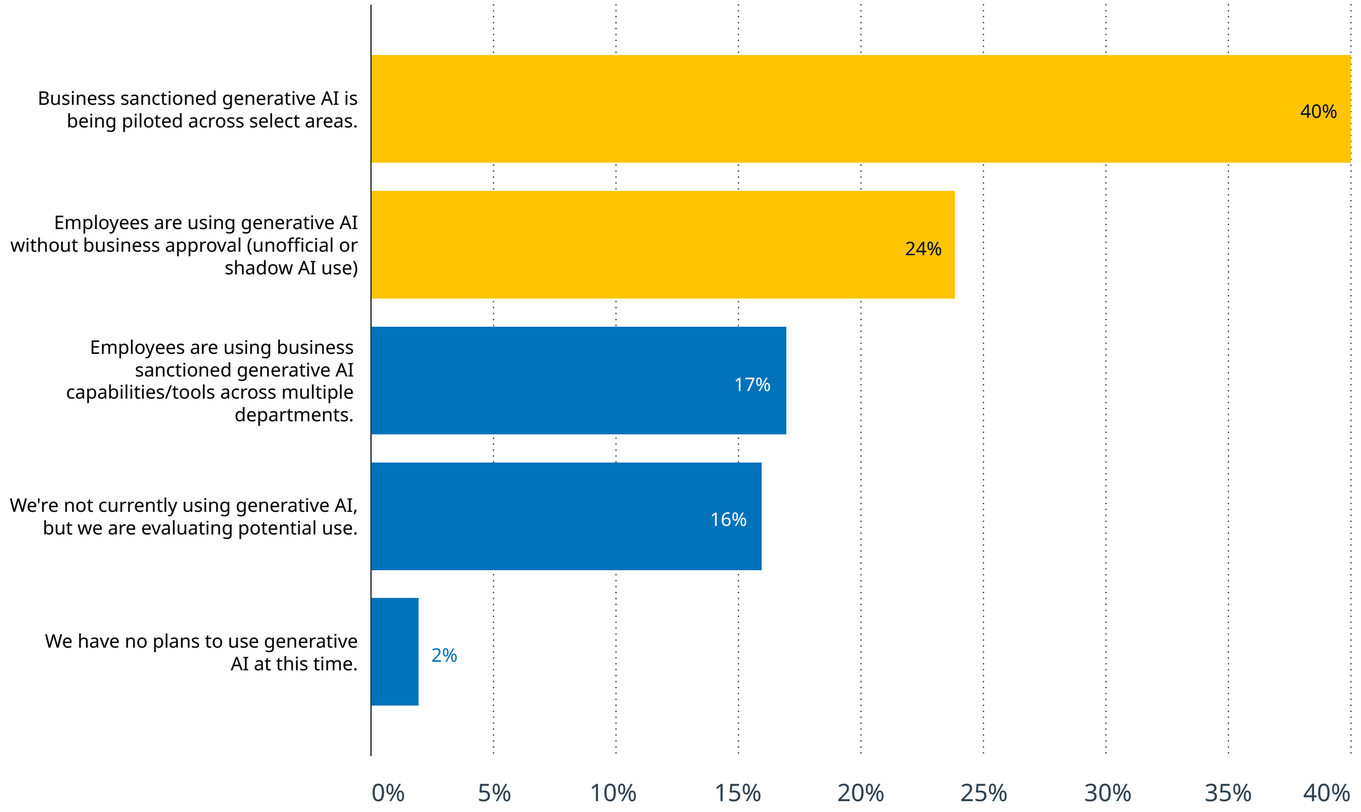
Generative AI: The future of service management

A quarter of organizations believe employees are using generative AI without business approval

The use of generative AI capabilities by businesses is significant, with only 2% of organizations advising they have no plans to use GenAI.

Employee use of AI technologies for business purposes without the knowledge or consent of an internal IT team, often termed “Shadow AI”, is on the rise. Our study shows that 24% of businesses advise that employees are using generative AI without business approval. It is important to note that this will likely be higher as there will be activity respondents don’t know about.

Which of the following best describes your organization’s current level of adoption of generative AI capabilities across all applications?



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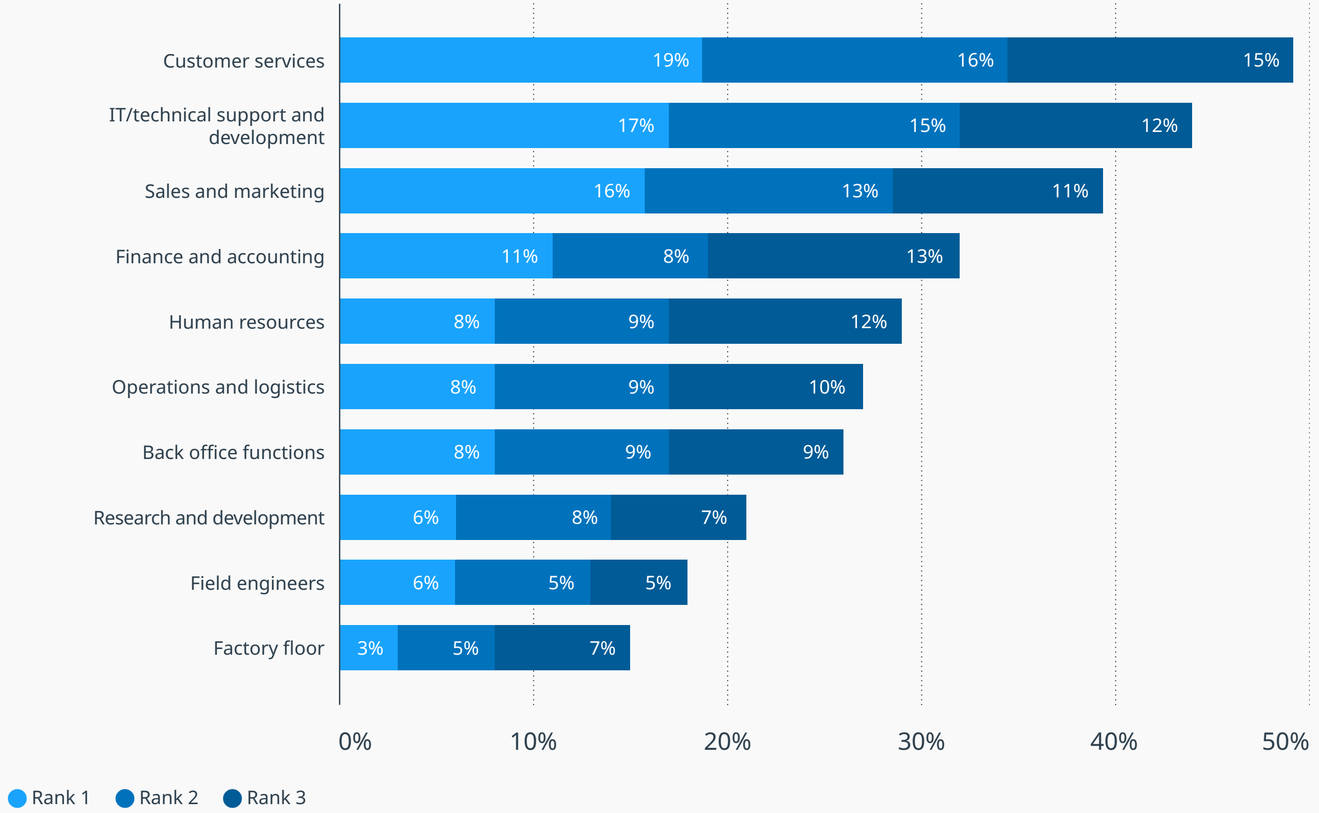
Generative AI: The future of service management

Businesses want GenAI to level-up customer services and IT

The study also explored the departments business leaders feel will benefit most from generative AI capabilities. Here, customer services was identified as the department that would most benefit the most from the technology. IT and technical support teams are also viewed as being significant beneficiaries, with 17% ranking it as the top priority.

This data highlights how AI investment decisions are likely to be focused on enhancing customer service experiences, with strong appeal for capabilities like chatbots and virtual agents. The focus on using AI within IT and technical support teams also highlights the focus on leveraging AI-driven automation to advance internal operations.For businesses unsure on where to start with AI, these two areas would be good places to focus efforts and resources.

Which employees or departments do you believe would benefit the most from the implementation of generative AI capabilities?



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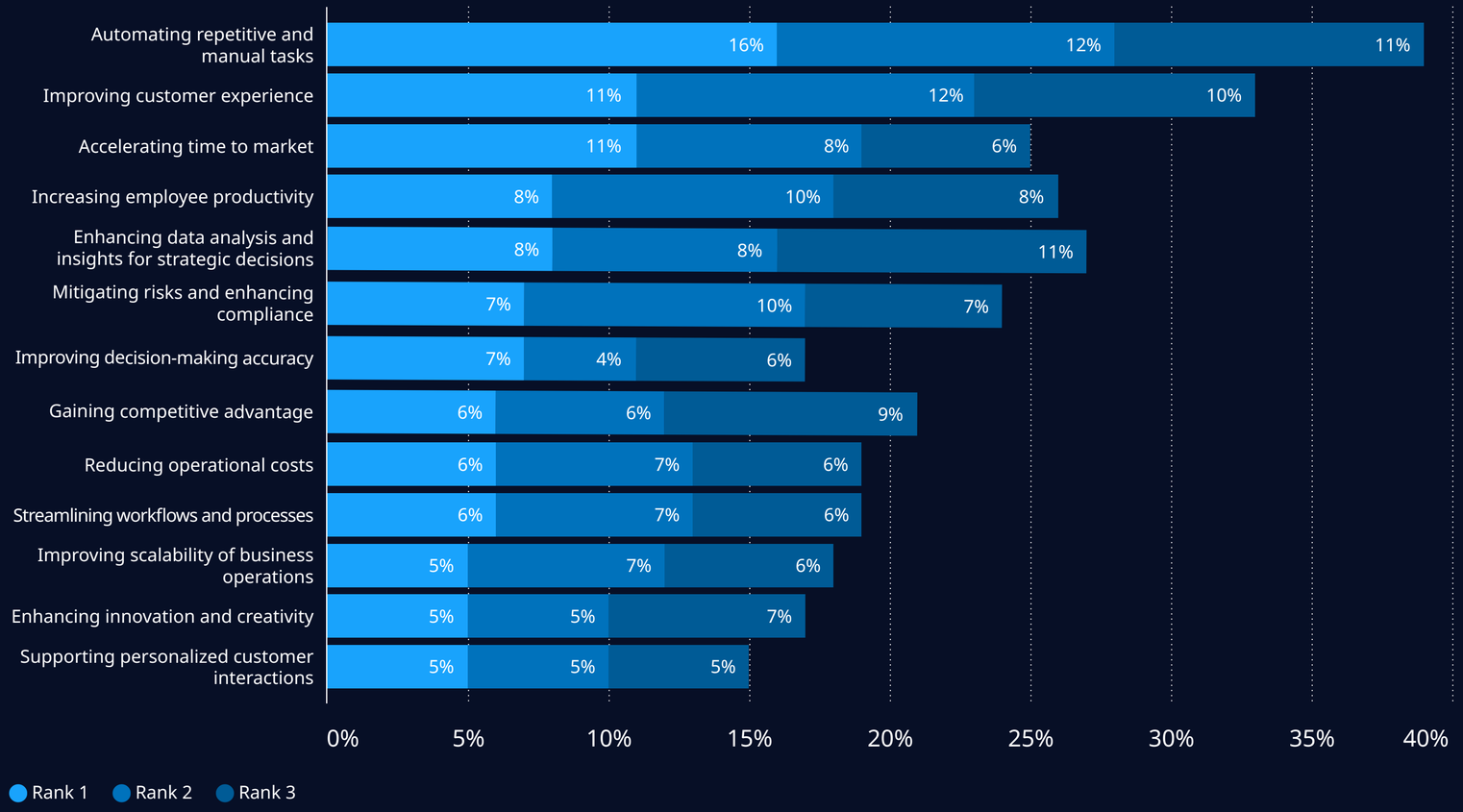
Which areas do you see the greatest potential for generative AI to enhance service management activities?



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Generative AI: The future of service management

Improving CX and streamlining employee tasks are AI objectives

Supporting the automation of repetitive and manual tasks is a key use-case that business leaders are looking to support through the adoption of generative AI capabilities.

Supporting customer experience improvements is another important use-case – unsurprising given the focus businesses have on adopting AI in benefiting CX activities.

The focus on supporting business strategy by enhancing data analysis also indicates how businesses are looking to adopt AI to gain a strategic and operational edge.

Generative AI: The future of service management

90% of businesses expect to pay more for GenAI capabilities

One of the relative unknowns around AI is in how much businesses are willing to pay for transformative capabilities that help them deliver more customer value and better business outcomes. From a service management perspective, it is only 10% of businesses that expect new AI capabilities that deliver high-value, transformative outcomes to be available at no additional cost to their existing service management license fees and structure. Conversely, 57% of businesses are prepared to pay between 4-10% on top of their existing service management budget for impactful GenAI capabilities.

10%	Will pay no additional fee
22%	Between 1-3%
41%	**Between 4-6%**
16%	Between 7-10%
9%	Between 11-15%
2%	More than 15%



Generative AI: The future of service management

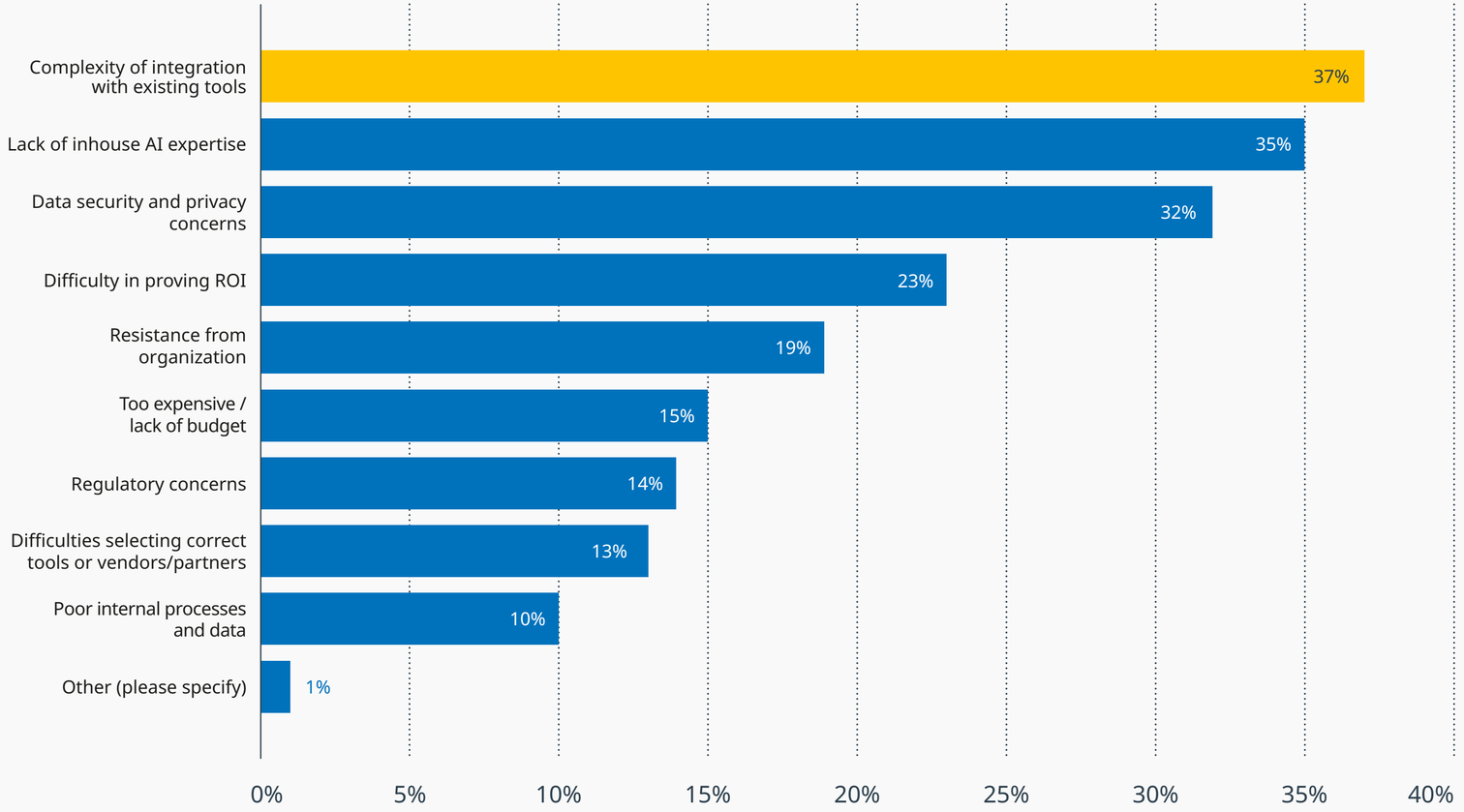
Integration is also viewed as the priority AI implementation challenge

It is vital that businesses understand the potential challenges associated with implementing AI, as doing so helps ensure they are in the best position to realize the improved efficiency, innovation, and competitive advantages the capabilities help deliver.

Priority challenges businesses currently associate with the technology include integration complexities (37%), data security concerns (32%), and a lack of inhouse AI expertise (35%).

Developing a clear AI strategy that is integrated across the entire organization is important. Additionally, when exploring new AI capabilities, businesses must explore how they integrate with existing tools and services. Finally, developing internal awareness and skills around AI is critical.

What are the top 2 biggest challenges your organization faces in implementing new AI capabilities?



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Generative AI: The future of service management

97% of businesses report that adopting GenAI has contributed to some form of revenue growth or benefit

Understanding the impact that disruptive technologies like GenAI are having on revenue growth is important in understanding ROI. Businesses that have implemented GenAI capabilities advise that the most significant value has been in improving customer retention and satisfaction, with 31% of respondents indicating that this result has led to increased revenues. Additionally, 20% of respondents noted that generative AI has enabled their businesses to launch new products/services, and 13% advised it has allowed entry into new markets or opened new revenue streams.

From a workflow automation perspective, this technology has had a notable impact on allowing entry into new markets or opening new revenue streams for businesses, with 31% of respondents highlighting this benefit. Furthermore, 25% of respondents reported that workflow automation has improved customer retention and satisfaction.

How has the implementation of generative AI, workflow automation, and low/no-code solutions contributed to revenue growth in your organization?

Response	We are not currently using this solution	Enabled the launch of new products / services	Improved customer retention and satisfaction, increasing revenue	Allowed entry into new markets / opened new revenue streams	Accelerated sales cycles	Increased upsell or cross-sell opportunities	No significant revenue growth
GenAI	**17%**	**20%**	**31%**	**13%**	**11%**	**5%**	**3%**
Workflow automation	**2%**	**14%**	**25%**	**31%**	**16%**	**10%**	**1%**
Low/no-code	**7%**	**11%**	**21%**	**26%**	**21%**	**12%**	**1%**

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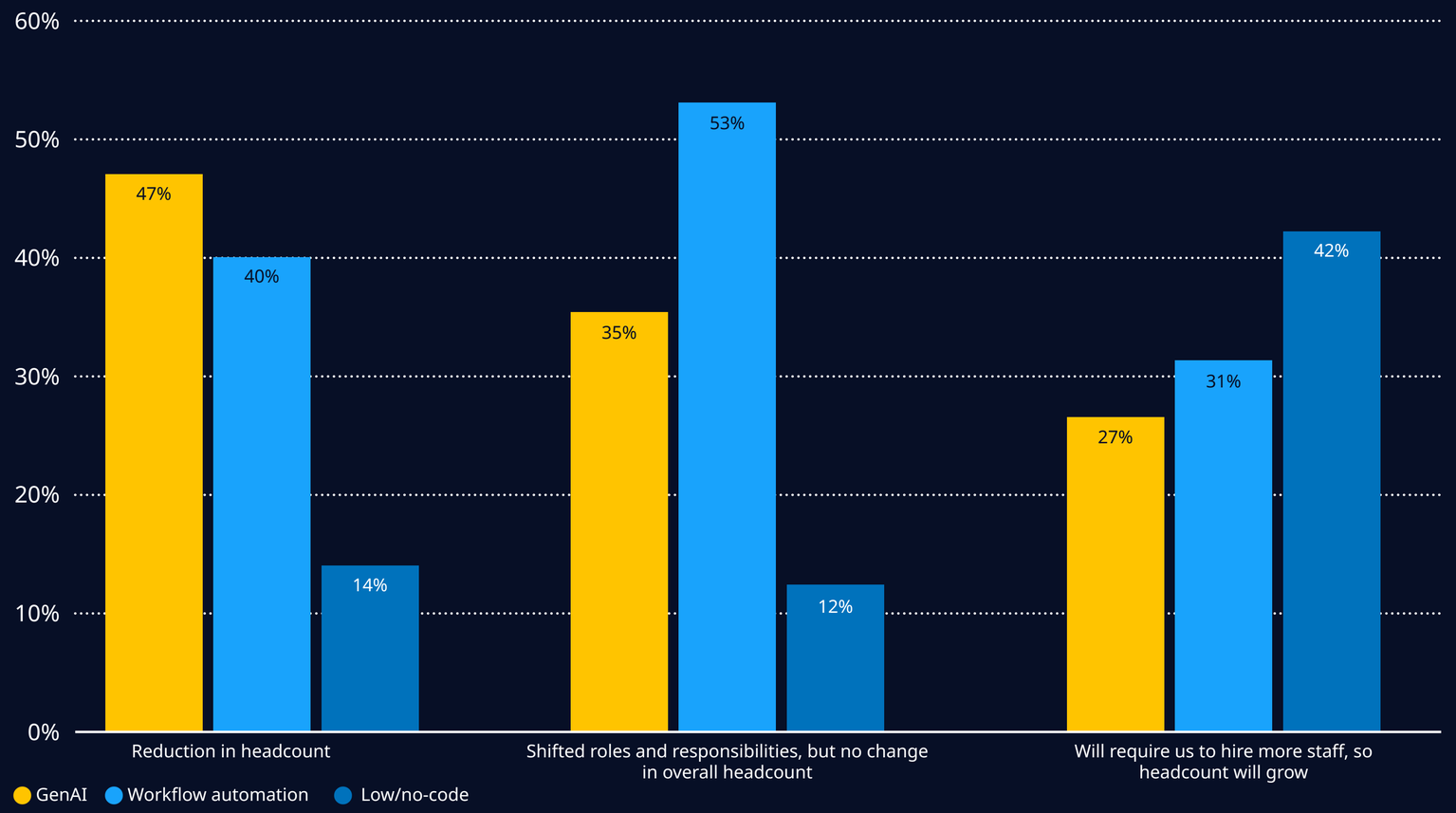
Generative AI: The future of service management

Half of organizations expect GenAI adoption to reduce headcount

Much conversation and focus has been on the impact of AI on the workforce, specifically employee headcount, but what is the reality? Our data reveals that a significant 47% of businesses anticipate a reduction in headcount due to the adoption of generative AI. However, 35% expect roles and responsibilities to shift without changing the overall headcount.

Business leaders also expect workflow automation to have a varied impact, with 40% of respondents predicting a reduction in headcount due to adoption of the technology, whilst 53% foresee a shift in roles and responsibilities without affecting the overall headcount.

What impact has the adoption of these solutions had, or do you anticipate it will have, on your organization's workforce?



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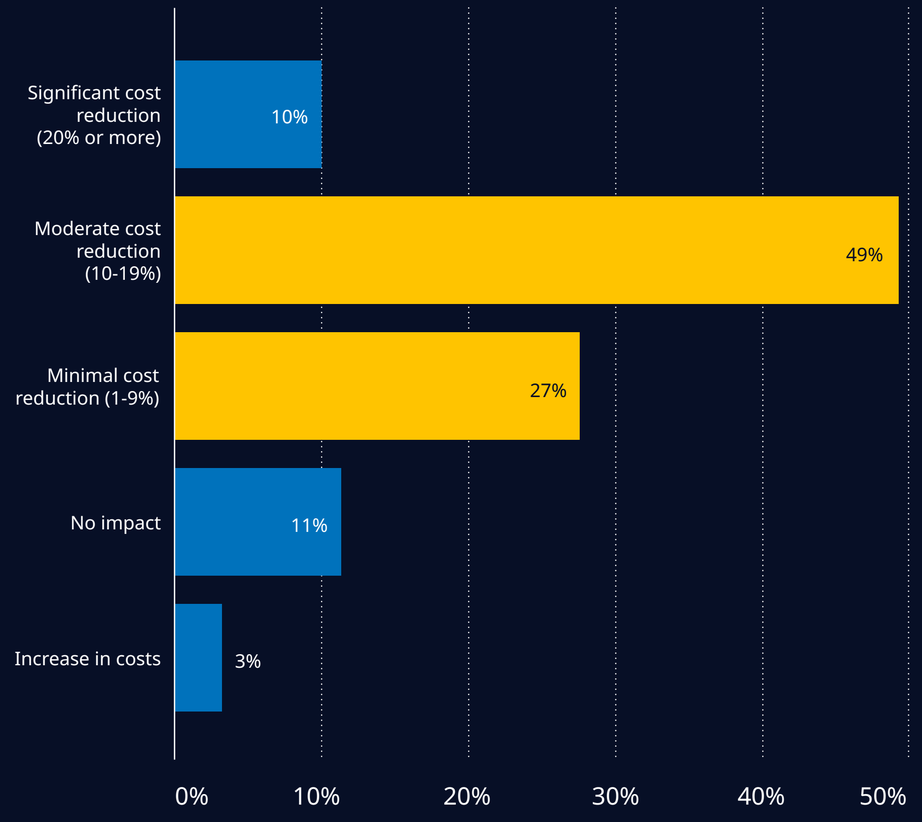
What is your expectation for how investment in generative AI and workflow automation capabilities will impact your organization's overall operational costs?



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Generative AI: The future of service management

76% of businesses expect AI and workflow automation to result in cost reductions of up to 20%

Whilst it is still early days in understanding the impact that AI and advanced automation technologies will have on an organization's bottom line, the expectation of business leaders is that notable cost reductions will be realized by embracing the technology.

Almost half of respondents (49%) expect investment in AI and workflow automation to result in a moderate cost reduction of 10-19%.

19% of businesses that have more than 20k+ employees anticipate significant cost reductions. Overall, organizations are very optimistic about achieving cost reductions through investments in generative AI and workflow automation.

Generative AI and service management: Industry perspectives



Banking & Finance

43% believe that adoption of generative AI capabilities will result in headcount reductions

Data security and privacy concerns **is the priority challenge these business face in implementing new AI capabilities**

Improving customer experience is the **AI use-case with the greatest potential**



Healthcare

56% of businesses are piloting or using business sanctioned generative AI capabilities/tools across multiple departments

41% highlight complexity of integrating AI with existing tools as the biggest challenge in adopting the technology



Manufacturing

Faster incident and case resolution is the primary driver of investment in generative AI capabilities for service management

32% advise that the implementation of generative AI has improved customer retention and satisfaction, helping increase revenue



Technology

35% of businesses believe employees are using generative AI without business approval – more than any other industry

74% of businesses believe generative AI will see them experience cost reductions of up to 20%

49% believe generative AI will result in a headcount reduction



Enhancing business efficiency with workflow automation

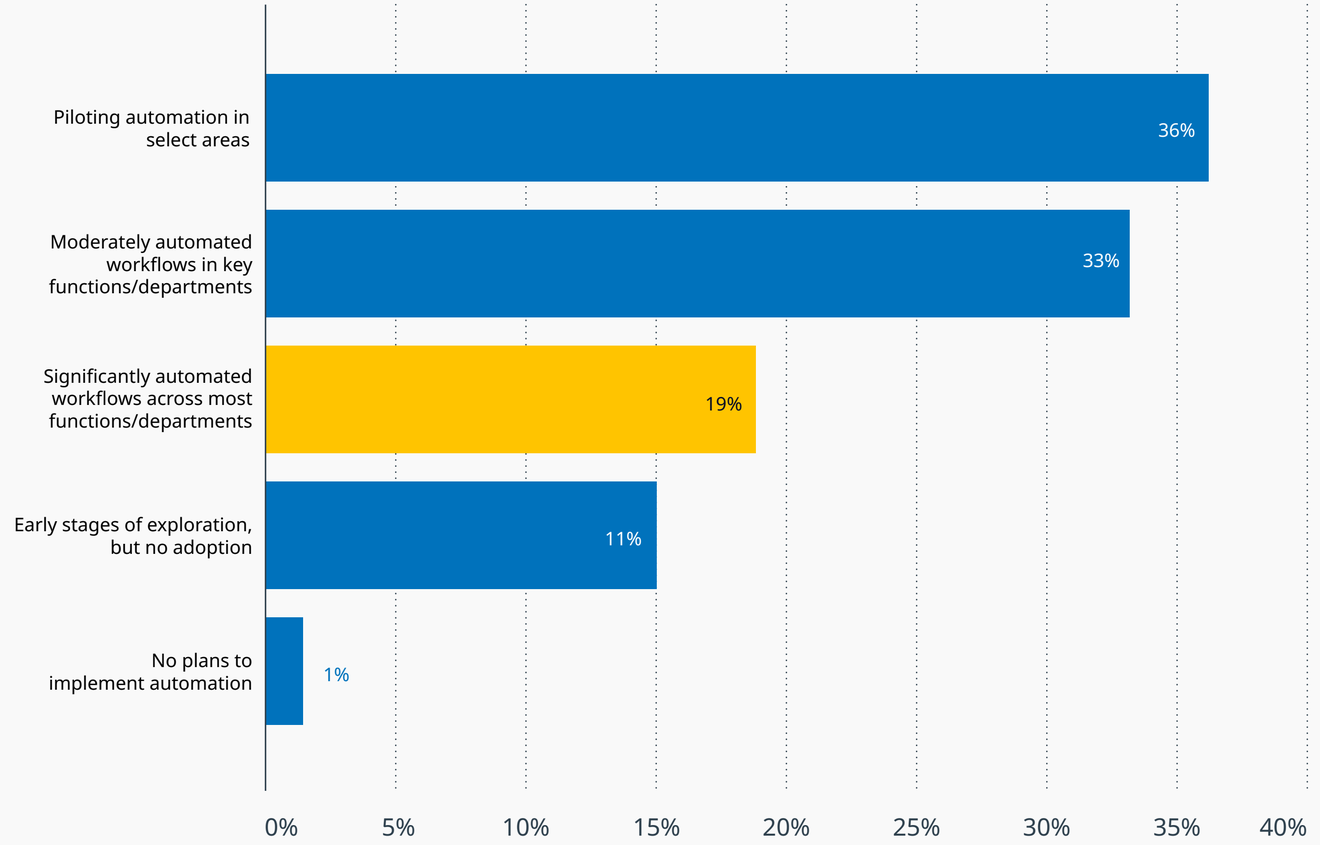
Automation capabilities have become the new service management foundation, helping extend the value of these solutions into supporting business units and use cases beyond just the IT department. Whilst there is still a lot of work to do by businesses in moving to more mature automation approaches, the early results are encouraging with businesses highlighting business efficiency improvements and customer satisfaction enhancements being realized through embracing automation.

Enhancing business efficiency with workflow automation

Only 19% of businesses have achieved significant automation of workflows across most functions and departments

A significant portion of organizations (36%) are piloting automation in select areas. This indicates that many organizations are in the experimental phase, testing automation solutions in specific departments or functions to evaluate their effectiveness before broader implementation.

How would you describe the maturity of your organization's current workflow automation strategy?



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Developing automation

- Only 5% of businesses with +20k employees have either not adopted or have no plans to adopt automation capabilities.
- In contrast, just under a quarter (22%) of businesses with between 1-5k employees have either not adopted or have no plans to adopt automation capabilities..

Advancing automation

- Overall, 53% of businesses have either moderately or significantly automated workflows.
- Life sciences and pharma are the most advanced in adoption (73%)
- Education is the least advanced (13%)



Enhancing business efficiency with workflow automation

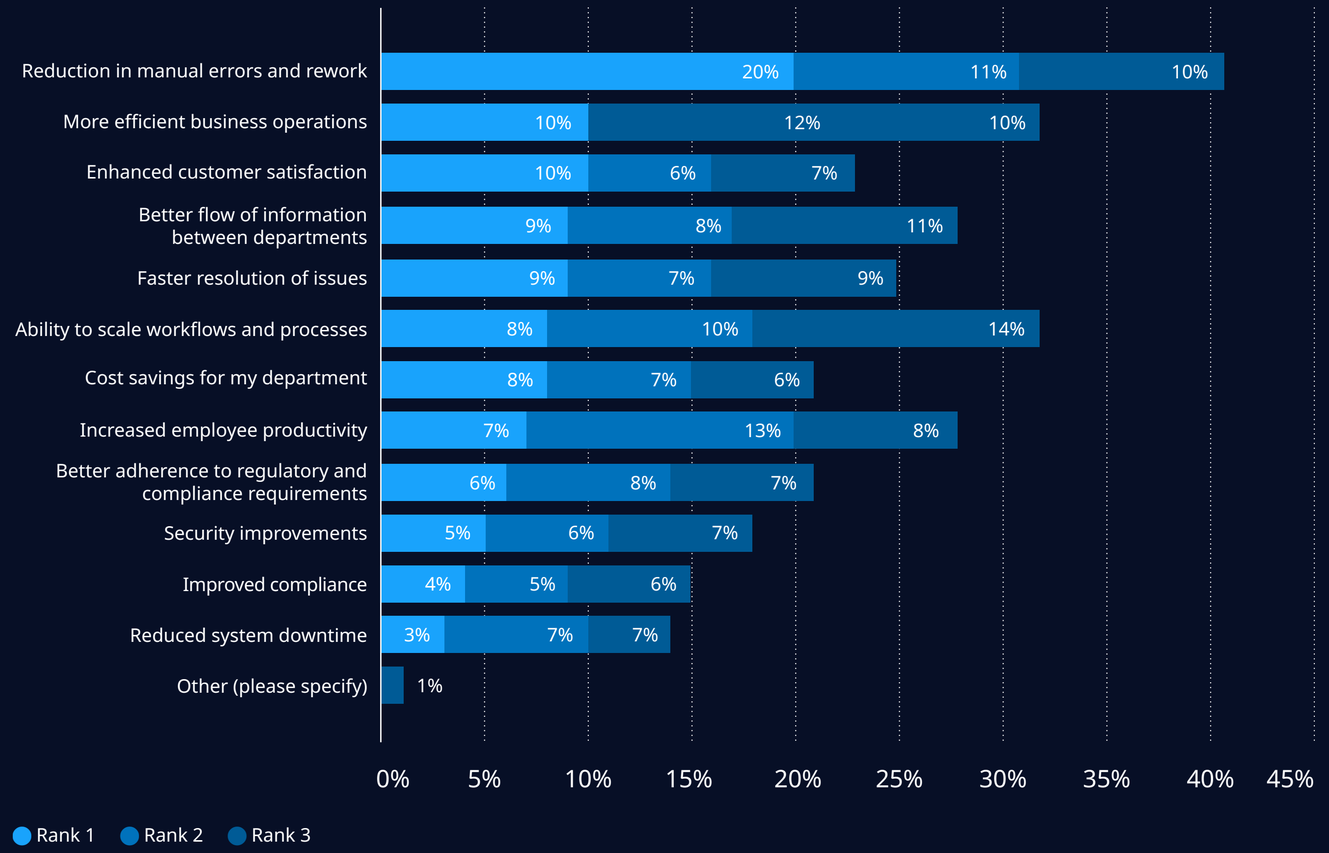
Workflow automation is reducing errors, boosting efficiency, and enhancing customer satisfaction

The most significant benefit of workflow automation businesses are experiencing is the reduction in manual errors and rework - 20% rank it as the top benefit, and it is the response that garnered the most attention overall.

Public sector organizations have also realized information flow and workflow scaling benefits.

The responses highlight how businesses are realizing substantial benefits from workflow automation, particularly in reducing errors, improving efficiency, and enhancing customer satisfaction.

What benefits has your organization realized from implementing workflow automation?



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Fewer than 25% of organizations have widely adopted low-code solutions

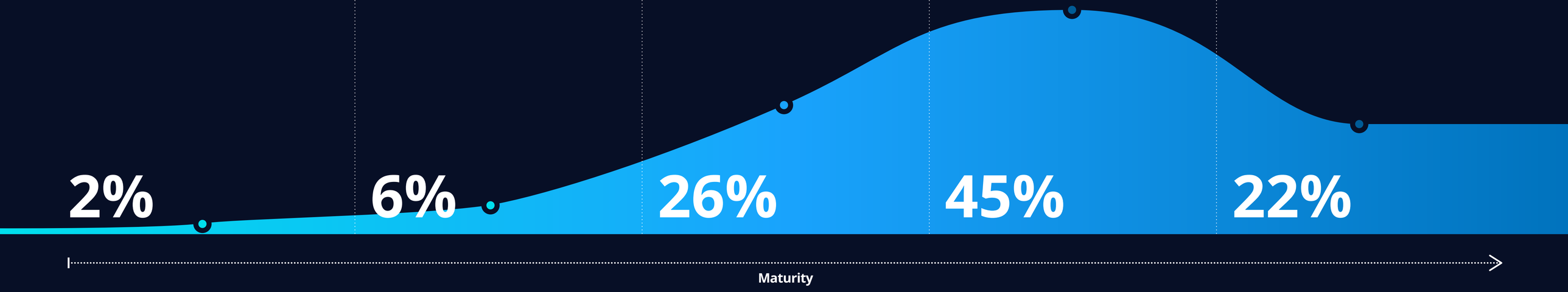
No interest:
We do not currently use low/no-code platforms and have no plans to adopt them

Not yet adopted but interested:
We haven't adopted low/no-code platforms, but we recognize their potential and may be interested in the future

Exploring adoption:
We are in the process of evaluating or piloting low/no-code platforms

Adopted but limited:
We have implemented low/no-code platforms across some teams and for particular use cases, but broader adoption is limited

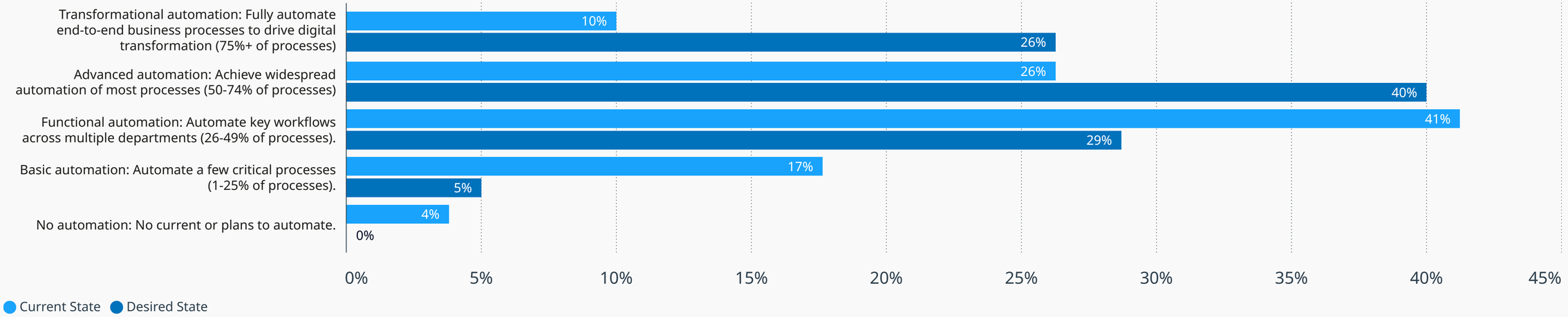
Adopted and expanding:
We have adopted and continue to expand low/no-code capabilities across multiple departments



Enhancing business efficiency with workflow automation

Larger businesses have a greater appetite for transformational workflow and process automation

What best describes your organization's current and desired level of business workflow and process automation over the next 2 years?



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Workflow automation: Industry perspectives



Banking & Finance

Just 2% of businesses in this vertical advised that workflow automation solutions hadn't supported their organization in growing revenues in some form

65% of respondents advised that they realized measurable benefits from workflow automation within six months



Healthcare

Complex integration with existing systems (40%) and a lack of skills/talent/expertise to implement and maintain automation solutions were cited as the biggest challenges facing implementation

Supporting s**calability and growth is the primary goal** in adopting automation capabilities by healthcare organizations



Manufacturing

66% of businesses in this vertical wish to move to either an advanced or transformational level of workflow and process automation over the next two years

45% of respondents highlight a reduction in manual errors and rework as a top workflow automation priority – more than any other aspiration



Technology

21% of businesses advise that they have significantly automated workflows across most business functions/ departments

34% of respondents advised that workflow automation enabled them to enter new markets and/or open-up new revenue streams



Collaborative success: The growing importance of partners in service management

Automation capabilities have become the new service management foundation, helping extend the value of these solutions into supporting business units and use cases beyond just the IT department. Whilst there is still a lot of work to do by businesses in moving to more mature automation approaches, the early results are encouraging with businesses highlighting business efficiency improvements and customer satisfaction enhancements being realized through embracing automation.

Collaborative success: The growing importance of partners in service management

76% of businesses view partners as being an important enabler of service management success

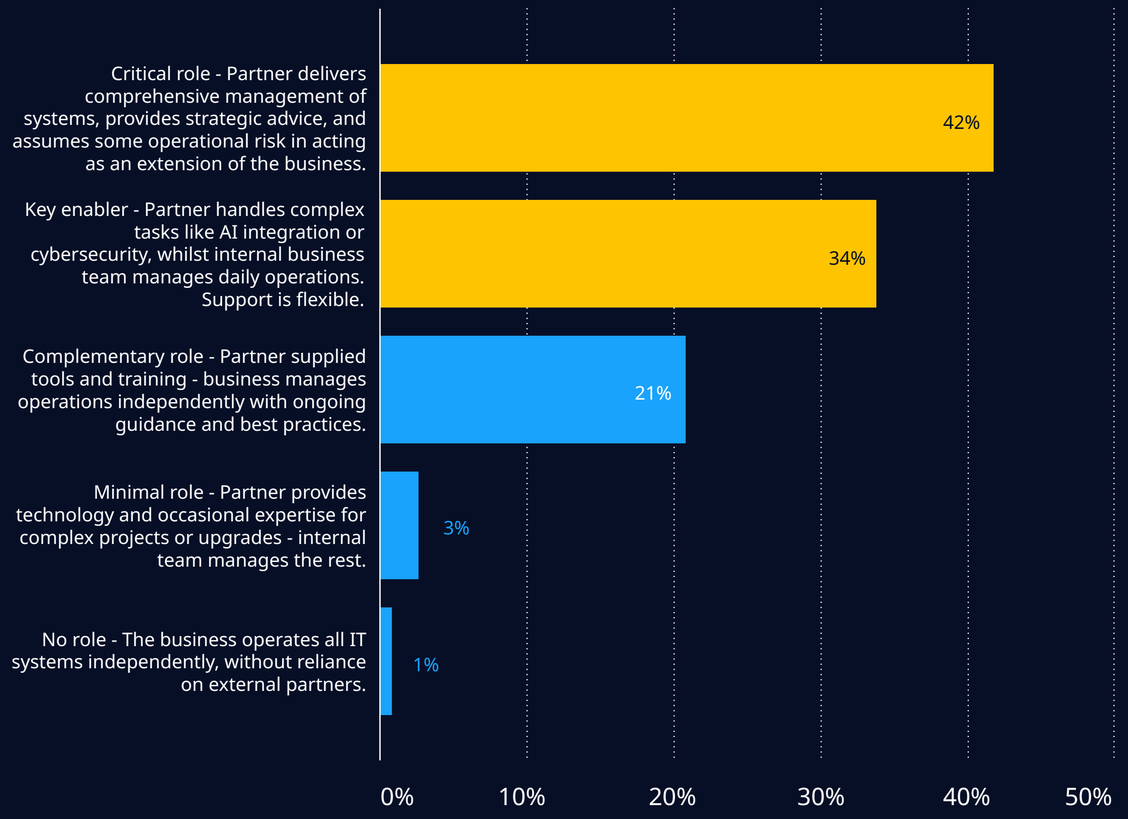
The survey results also reveal key trends and insights regarding the strategic role of partnerships in enhancing service management, automation maturity, and overall business operations.

42% of respondents view partnerships as playing a critical role, where partners deliver comprehensive system management and strategic guidance and direction.

The larger the organization, the more critical partnerships are to them. 20% of businesses with between 1-5k employees view partnerships as critical, compared to 53% of businesses with more than 20k employees.

86% of businesses in travel, transportation, and logistics view partnerships as being a key or critical enabler of business enhancements with service management capabilities – more than any other industry.

What strategic role do partnerships play/will partnerships play in enhancing your organization's service management, automation maturity and overall business operations?



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Collaborative success: The growing importance of partners in service management

Industry specificity and integration expertise will drive interest in partners

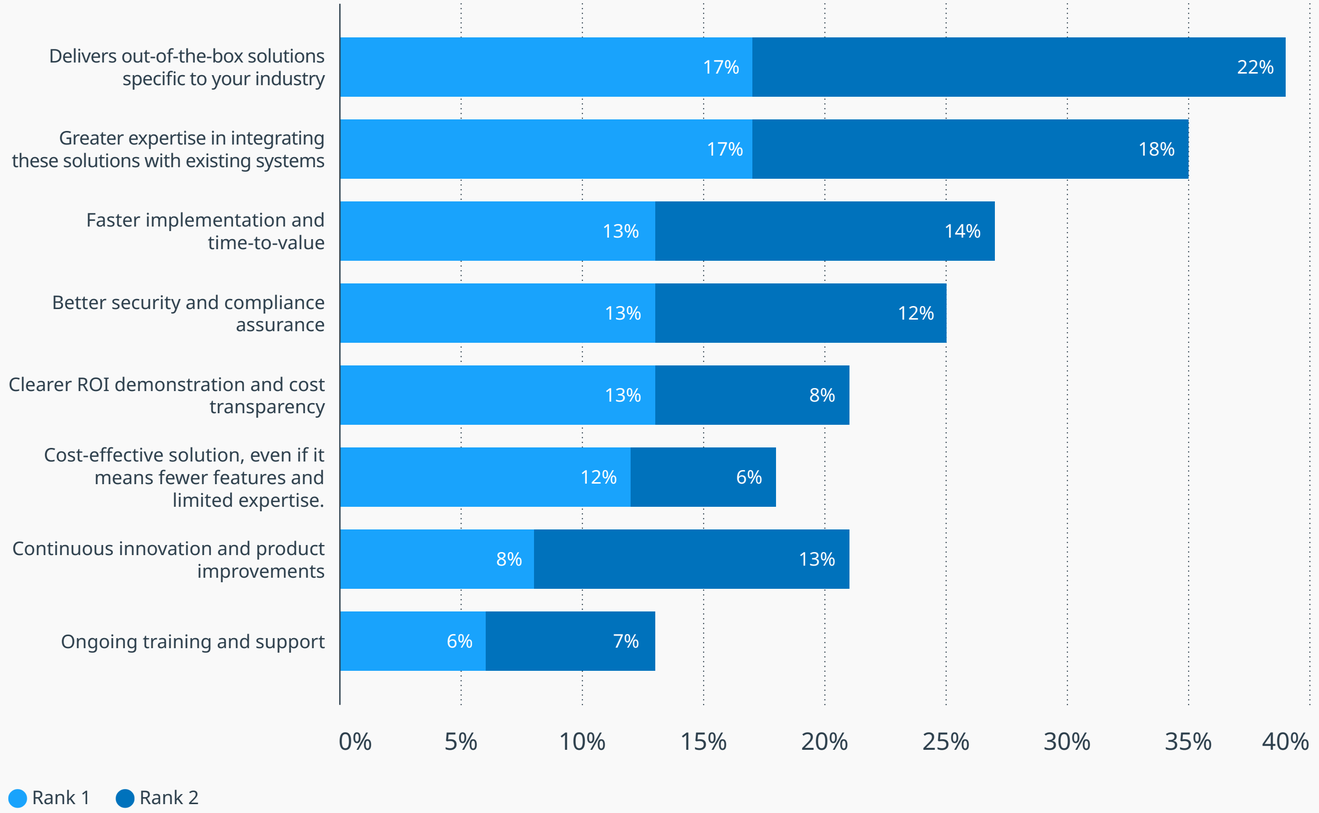
When exploring what organization's key priorities are for working with partners, the need for expertise in integrating cutting edge technologies with existing systems is important.

Enterprise solutions and services are increasingly becoming more verticalized, and the data shows this is also the case for service management where industry-specific solutions are highly valued partner capabilities, with 17% ranking it first and 22% ranking it second.

Faster implementation and time-to-value is another key priority, with 13% ranking it first and 14% ranking it second.

Additionally, better security and compliance assurance, and clearer ROI demonstration and cost transparency are significant priorities.

What are your organization's key priorities when engaging with technology and service provider partners for generative AI, workflow automation, or low/no-code service management solutions?



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Collaborative success: The growing importance of partners in service management

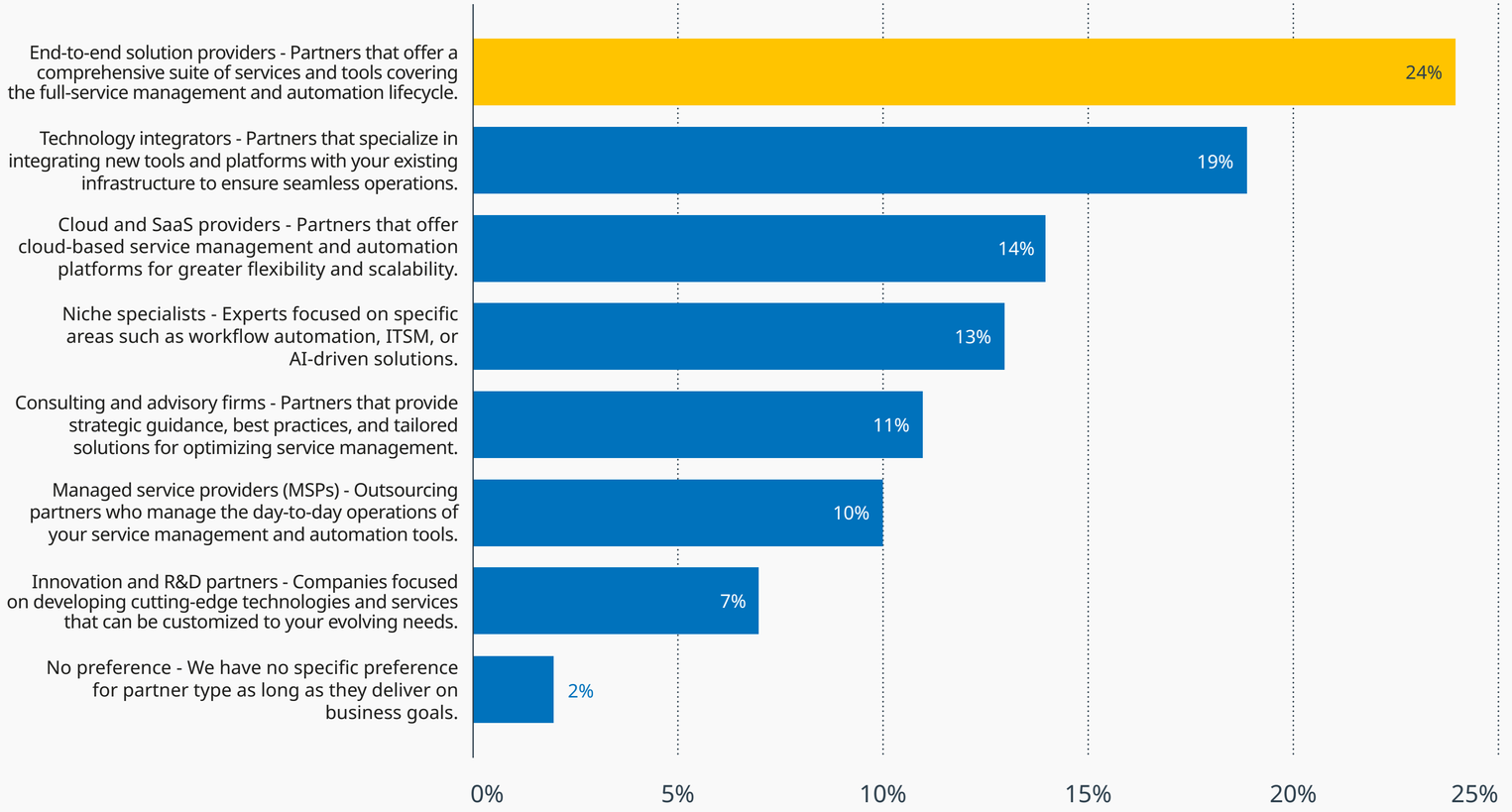
Businesses want partners that support end-to-end service management

Partners that deliver comprehensive end-to-end solutions are viewed as the most favoured and critical, with a quarter of total respondents (24%) indicating a strong preference. This is especially true in businesses that employ between 1-5k people.

Technology integrators are also highly valued by 19% of respondents. This again emphasizes the importance of integration for businesses.

There is also strong preference for cloud and SaaS providers, reflecting the growing trend towards flexible and scalable cloud-based solutions.

What type of partner or supplier do you view as most critical in helping your organization accelerate service management, workflow automation, and overall business objectives?



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The growing importance of partners in service management: Industry perspectives



Banking & Finance

78% advise that partners will be a key enabler or play a critical role in enhancing their organization's service management, automation maturity, and overall business operations

A key priority is for partners to deliver solutions developed specifically around the needs of the financial industry



Healthcare

Partners that offer a comprehensive suite of services and tools covering the full-service management and automation lifecycle are preferred over others

In healthcare, **70% advise that partners will be a key enabler or play a critical role** in enhancing their organization's service management maturity and overall business operations



Manufacturing

22% of manufacturing businesses rank a need for expertise in integrating AI, workflow automation, and low/no-code solutions with existing systems as the primary reason for engaging with a service management partner. This is the dominant priority in this industry, **with faster implementation and time to value (17%) following**



Technology

Only 6% of technology, telecom, and media businesses advised that they saw partners playing a minimal role in enhancing their organization's service management, automation maturity, and overall business operations. The role of partners is critical to success

Navigating the disruptive digital landscape and understanding value

Understanding value is key to any successful service management initiative. Businesses are relying on a mix of traditional and new methods of quantifying value and determining the success of service management projects. Encouragingly, many businesses highlight how important service management is in helping their business be successful, but there is still room for improvement.



Navigating the disruptive digital landscape and understanding value

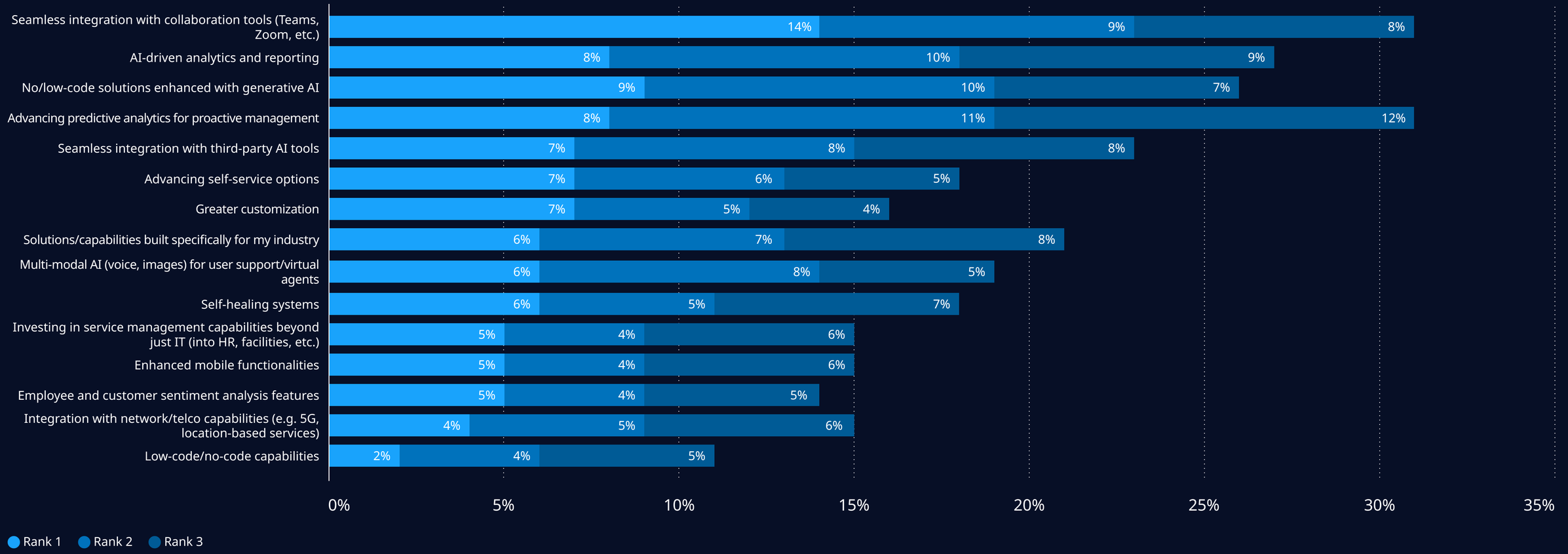
Seamless integration between service management and collaboration tools is the emerging capability with highest interest

Seamless integration with collaboration tools like Teams and Zoom is the top priority for 14% of respondents, indicating a strong focus on enhancing communication and collaboration within organizations.

No/low-code solutions are the second most important priority for large businesses with 20k+ employees.

In the UK, integration with collaboration tools is viewed as less important. Here, advancing predictive analytics for proactive management and seamless integration with third-party AI tools are the priorities. Japan also has a focus on AI; AI-driven analytics and reporting are the priority for b§usinesses in this country.

Which emerging service management capabilities is your organization most interested in adopting over the next 2 years?



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Navigating the disruptive digital landscape and understanding value

Traditional metrics still drive service management ROI, but people-centric metrics are becoming more important

Measuring the current, as-is state of service management is vital in helping businesses know where to invest resources in maximizing ROI.

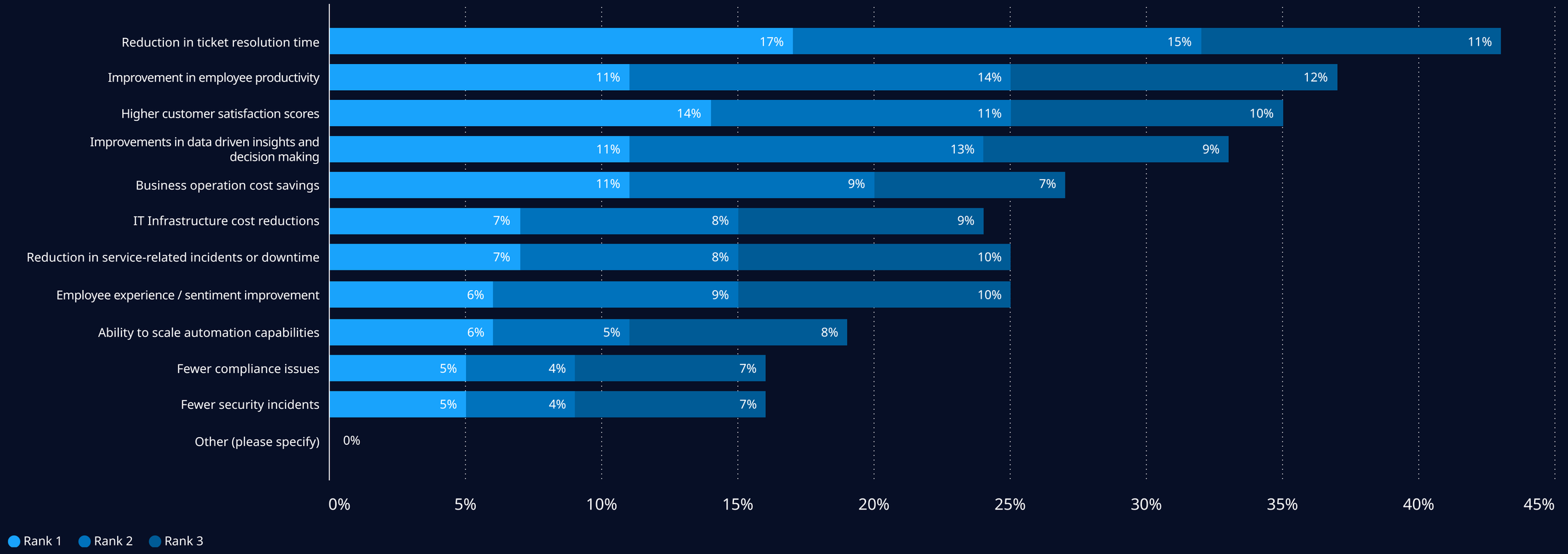
Case resolution speed, customer satisfaction improvements, and more efficient decision making supported by better data and insights are important service management ROI indicators.

Encouragingly, employee productivity improvements are also being viewed as an important ROI indicator. This emphasizes the growing importance service management solutions play in enhancing employee productivity overall.

It may be surprising to not see cost savings ranked higher, but this will be a universal objective achieved as a by-product of focus on the other ROI levers analyzed.



How do you currently measure the value or ROI from your investment in service management solutions?



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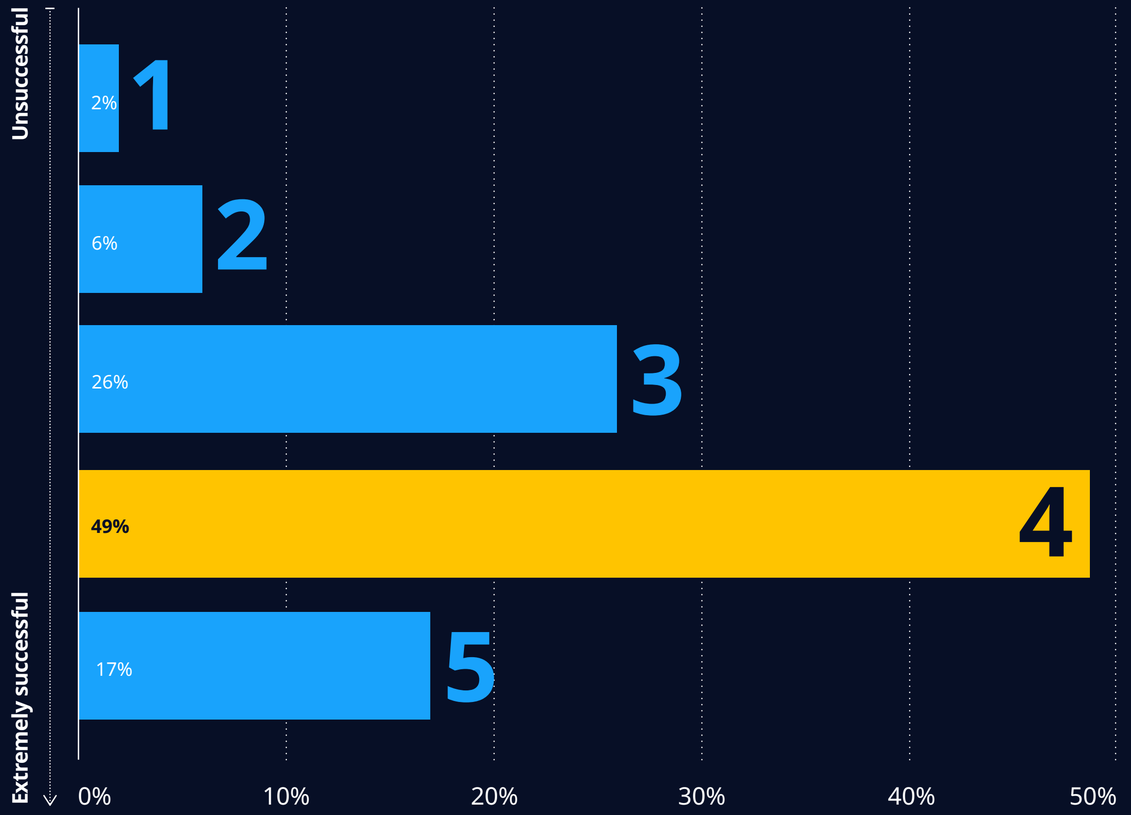
How successful has your organization been in realizing the expected benefits of its investment in service management and workflow automation solutions/services?



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Navigating the disruptive digital landscape and understanding value

49% of companies report strong success from service management initiatives

Most organizations have experienced a very good level of success in the adoption of service management and workflow automation capabilities, with the majority of respondents rating their success as positively.

This is certainly a testament to the effectiveness of service management solutions in delivering the desired business benefits.

Despite the encouraging result of only a very small percentage of respondents (2%) rating their success as a 1 out of 5, it is also a quite modest amount (17%) that rated their adoption as extremely successful (5 out of 5). This highlights the opportunity for service management vendors and service providers to further improve their solutions in delivering the most business success.

Navigating the disruptive digital landscape and understanding value

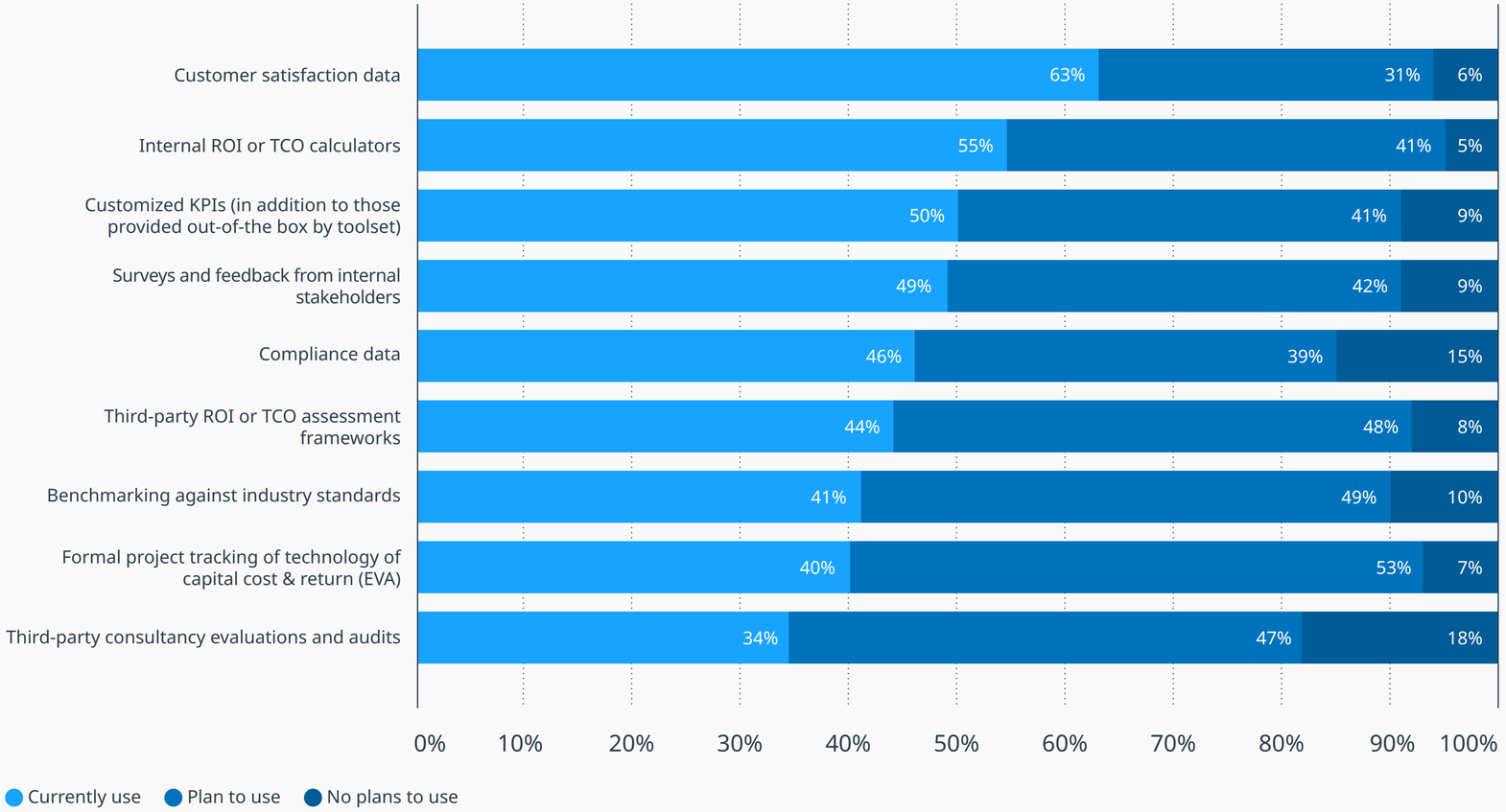
Unlocking service management value: Customer satisfaction is the priority ROI indicator at present, but focus is shifting



Businesses rely on different methods and data in quantifying the success and value delivered by service management and workflow automation solutions. The most dominant method of quantifying ROI at present is using customer satisfaction data. This is really encouraging, as it shows the important link many businesses are drawing between service management capabilities and the value they provide in supporting customer outcomes. As an aspiration, there is a strong desire to adopt format project tracking methods relating to technology capital and returns.

Other important insights include large businesses (20k+ employees) are keen to embrace ROI calculators, and healthcare and financial services firms highlighting third-party evaluations as an important ROI method going forward.

What methodologies does your organization use, or plan to use, to quantify the ROI of service management and workflow automation?



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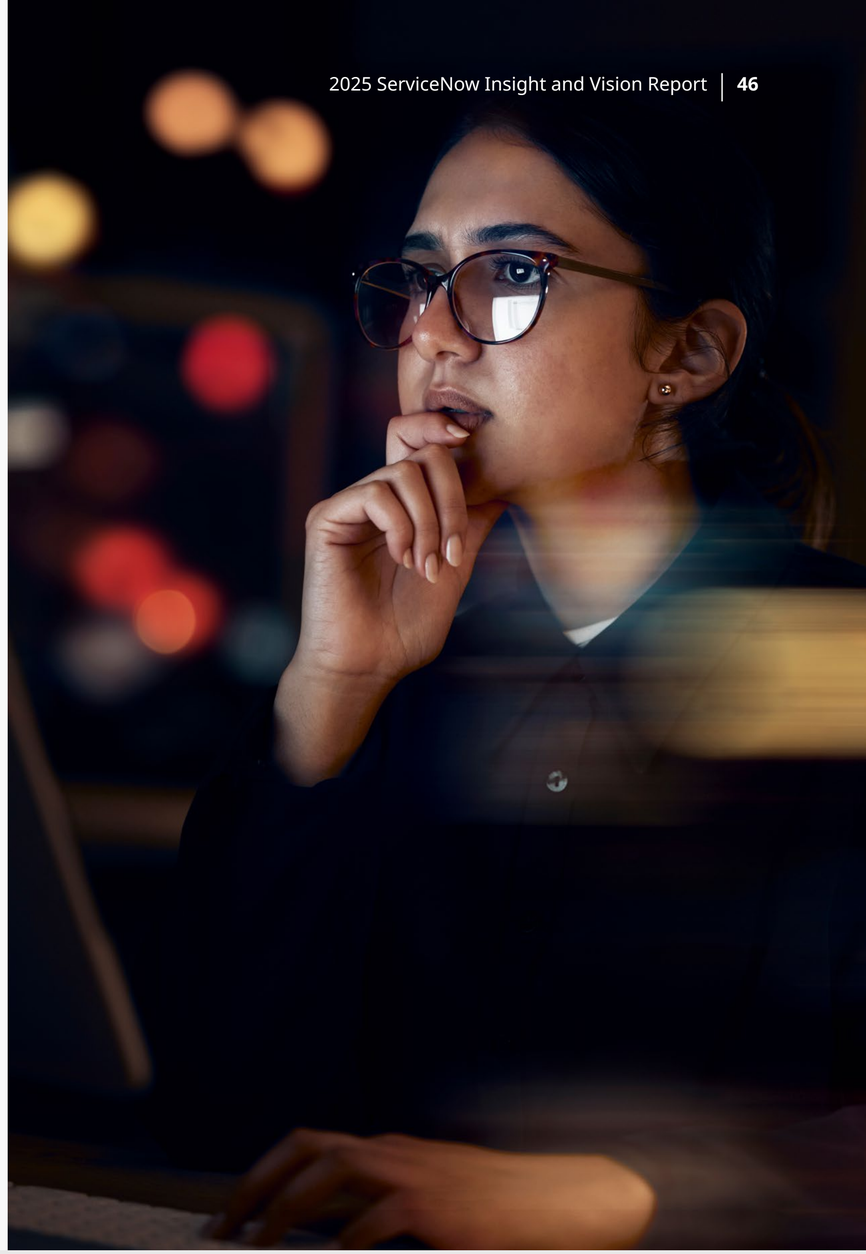

Navigating the disruptive digital landscape and understanding value

The majority of businesses are experiencing measurable benefits from disruptive technologies within 6 months of adoption

The survey results show that most businesses see measurable and impactful benefits within the first year of implementing these nascent capabilities, and a significant number realize benefits within the first 3-6 months. The relatively quick timescales associated with realizing value should be a motivator for other organizations looking at embracing these technologies.

45% of businesses advise that measurable benefits from workflow automation capabilities were realized within 3-6 months.

Organizations also advised that GenAI delivered quick tangible benefits, with 54% of businesses advising benefits were realized within 6 months.

28% of businesses advised that measurable benefits from low-code solutions were realized within 3-6 months.

How quickly did your organization realize measurable benefits (e.g., cost savings, productivity gains, revenue growth) after implementing the solutions below?

Response	Utilizing, but no measurable benefits realized yet	Within 3 months	3-6 months	7-12 months	13-18 months	More than 18 months
GenAI	**6%**	**18%**	**36%**	**21%**	**16%**	**3%**
Workflow automation	**5%**	**22%**	**45%**	**21%**	**6%**	**2%**
Low/no-code	**9%**	**28%**	**35%**	**16%**	**10%**	**2%**

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Disruptive technologies and trends: Industry perspectives



Banking & Finance

33% of banking and financial services businesses advise that advancing predictive analytics for proactive management is the emerging service management capabilities **they are most interested in adopting over the next 2 years**



Healthcare

The healthcare industries **priority emerging service management capability is seamless integration with collaboration tools (Teams, Zoom, etc.)**

19% of healthcare organizations advise they have been extremely successful in in realizing the benefits of investment in service management solutions/services



Manufacturing

Manufacturing industries have a strong demand for AI-driven analytics and reporting, no/low-code solutions enhanced with generative AI, and advanced predictive analytics for proactive management

Improving employee productivity is a vital measure of service management ROI



Technology

22% advise their organization has been extremely successful in realizing the expected benefits of its investment in service management and workflow automation solutions/services

ServiceNow adoption trends and business impact



ServiceNow adoption trends and business impact

70% of businesses advise ServiceNow adoption has met or exceeded their expectations

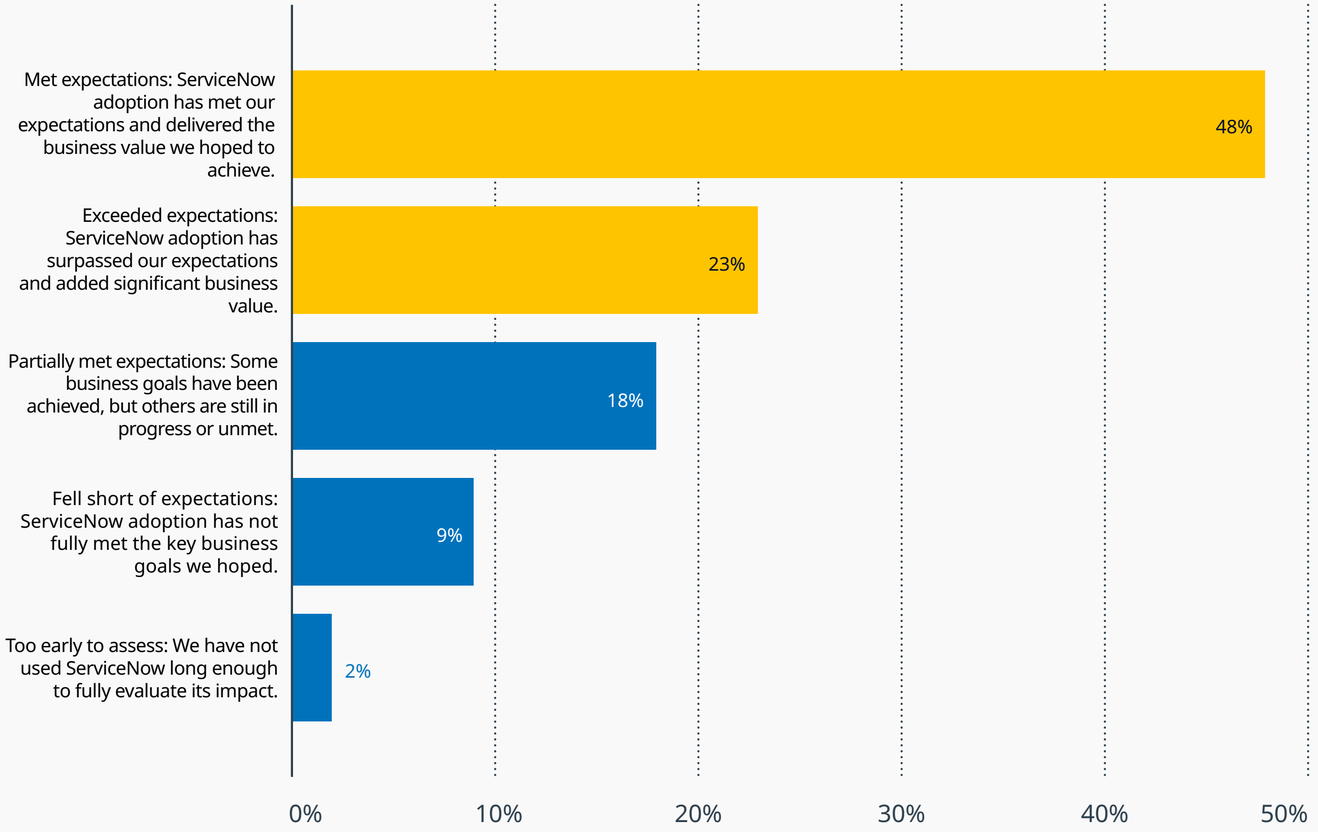
Just under half (48%) of businesses advise that ServiceNow has met their expectations in delivering the value they hoped to achieve via adoption.

94% of businesses with 20k+ employees advise ServiceNow has met expectations.

23% of businesses indicated that ServiceNow adoption has surpassed their initial expectations and added significant business value.

In terms of room for improvement, 27% of businesses advised that ServiceNow has either partially met their expectations or fell short of expectations, with some business goals still in progress or unmet.

How has ServiceNow delivered the IT and business goals you hoped to achieve prior to adopting the solution?



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ServiceNow adoption trends and business impact

Enhancements to compliance and integration capabilities will further improve business satisfaction with ServiceNow

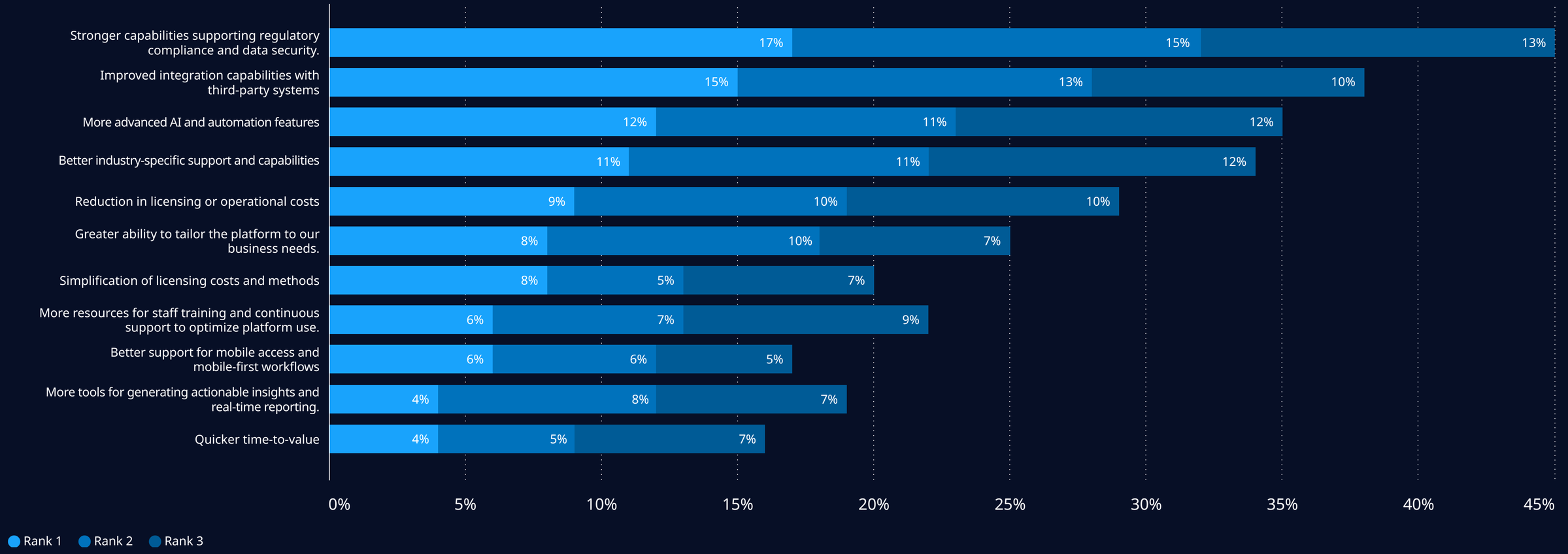
To deliver better business support, ServiceNow should provide stronger capabilities for supporting regulatory compliance and data security. It doesn't necessarily mean ServiceNow is weak here, just that it is an important priority.

As we have seen throughout the results, improved integration capabilities with third-party systems are also highly valued, with 15% of respondents ranking it as their top priority.

More advanced AI and automation features and support represents another area of interest, with 12% of respondents ranking it as their top priority.



What could ServiceNow deliver to better support your business and IT goals?



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Conclusion





Conclusion

Aligning service management with digital and business objectives

The 2025 study highlights the importance that businesses are attaching to service management as a practice, in addition to nascent technologies such as generative AI and advanced automation. Businesses are looking to these technologies to help drive new efficiencies, and in enhancing both customer and employee experiences. Whilst the appetite for these capabilities is strong, the study also highlights the significant barriers that businesses must overcome in realizing their defined aspirations and objectives. This gap highlights the important role that service management technology and service providers will play in supporting businesses to evolve and realize new value in the face of rapidly evolving digital disruptions.

Service management is no longer just an IT discipline and concern. The practice and supporting technologies will be pivotal in helping businesses overcome common challenges that hinder digital success, including siloed data and business functions, disconnected employee and customer experience processes, and fragmented and complex digital technology estates.

Survey demographics



Survey demographics

Regional breakdown & business size

Geographically, the respondents are spread across various regions, with the largest proportion, 40%, headquartered in the United States.

Other notable locations include Germany, Japan, and the United Kingdom, each representing 12% of the respondents, followed by Brazil, Canada, and Italy, each with 8%.

In terms of company size, the majority of respondents work for large organizations. Specifically, 41% are from companies with 10,000 to 20,000 employees, and 28% are from organizations with 5,000 to 9,999 employees.

6% of respondents are from companies with more than 20,000 employees, and none are from companies with fewer than 1,000 employees.

Country	
Brazil	8%
Canada	8%
Germany	12%
Italy	8%
Japan	12%
United Kingdom	12%
United States	40%

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Business size	
Fewer than 1000 employees	0%
1,000 to 4,999 employees	25%
5,000 to 9,999 employees	28%
10,000 to 20,000 employees	41%
More than 20,000 employees	6%

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Survey demographics

Organization revenues

Financially, the respondents' organizations also vary in size. The largest group, 40%, reported annual revenues between $1 billion and $4.99 billion.

34% have revenues between $5 billion and $9.99 billion.

Smaller proportions reported revenues of $500 million to $999 million (16%) and $10 billion to $20 billion (8%), with 2% exceeding $20 billion.

Revenues	
Less than $500 million	0%
$500 million to $999 million	16%
$1 billion to $4.99 billion	40%
$5 billion to $9.99 billion	34%
$10 billion to $20 billion	8%
More than $20 billion	2%

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Industry profiling

The respondents represent a wide range of sectors.

Representation across manufacturing leads with 21%, followed by banking and financial services, and healthcare, each with 18%.

Other industries include public sector (9%), retail and CPG (7%), and telecom, media, and technology (7%).

Industry	
Automotive	5%
Banking and Financial Services	18%
Education	2%
Energy and utilities	4%
Healthcare	18%
Insurance	3%
Life sciences and pharma	2%
Manufacturing	21%
Public sector	9%
Retail and CPG	7%
Telcom, media and technology	7%
Travel, transportation & logistics	3%

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Survey demographics

Respondent departments

The respondents' roles within their organizations are also diverse.

A significant portion, 41%, work in Information Technology, while 16% are in IT Operations, and 15% are in Executive Management.

Other departments include Digital Transformation (6%), Service Management (6%), and Employee Experience (5%).

Department	
Desktop services/support	2%
Employee experience	5%
Executive management	15%
Human resources	3%
Information technology	41%
Digital transformation	6%
Cloud services	2%
IT Operations	16%
Service delivery	5%
Service management	6%

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Job roles

In terms of job roles, the majority of respondents hold senior positions, with 58% being Directors and 30% Vice Presidents or Senior Vice Presidents.

Additionally, 12% of respondents are C-level executives, highlighting the high level of decision-making authority among the survey participants.

Job role	
C-level	12%
Director	58%
Vice President/SVP	30%
Vice President/SVP	30%

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Appendix



Appendix

NTT DATA

About NTT DATA

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Visit us at: nttdataservices.com

Omdia

About Omdia consulting

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We create business advantage for our customers by providing actionable insight to support business planning, product development and go-to-market initiatives.

Our unique combination of authoritative data, market analysis and vertical industry expertise is designed to empower decision-making, helping our clients profit from new technologies and capitalize on evolving business models.

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We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Omdia's consulting team may be able to help your company identify future trends and opportunities.

Appendix

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