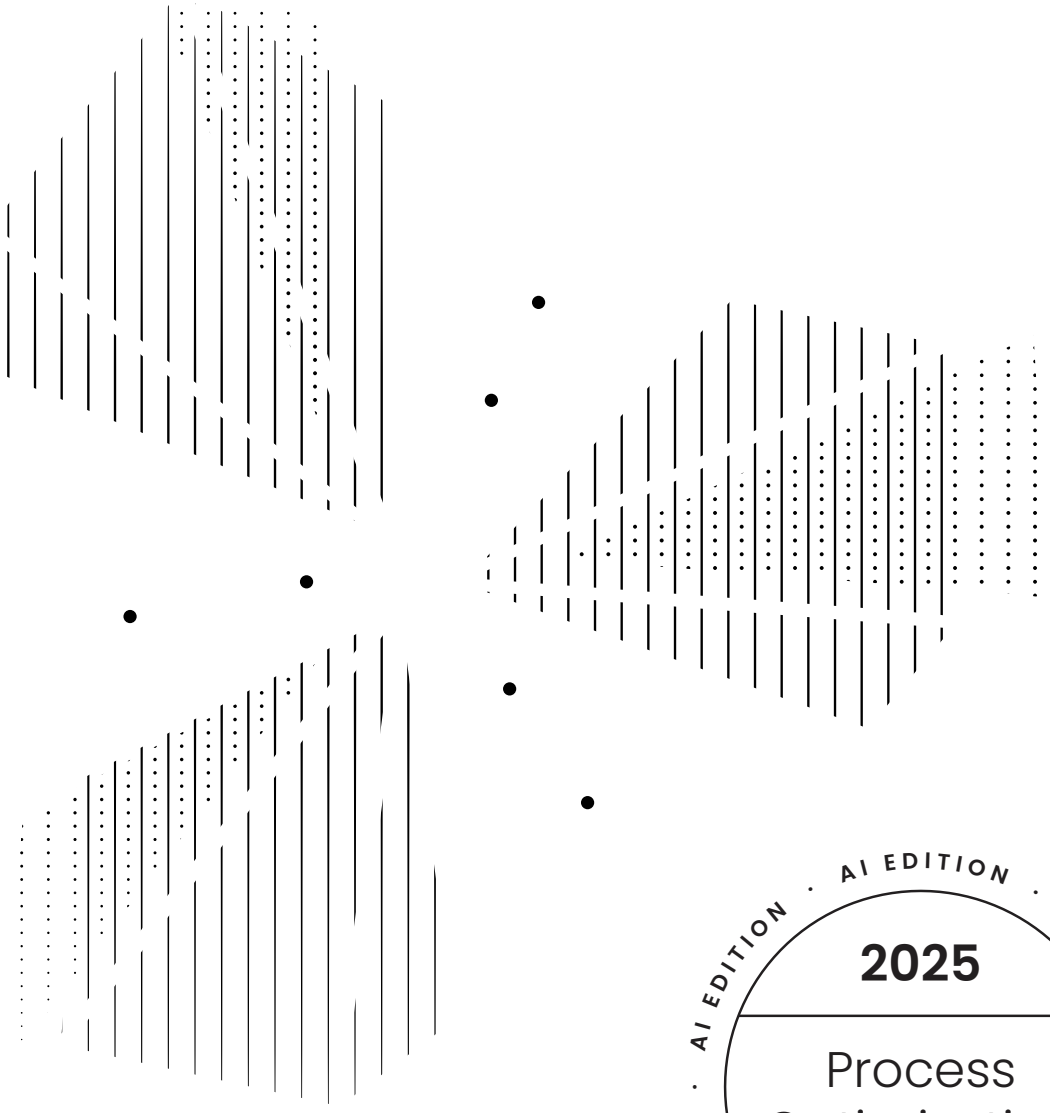
What AI needs to succeed

1,620 enterprise leaders on processes, use cases, and ROI



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2025

Process Optimization Report

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Contents

Processes give AI what it needs to succeed

We all understand the transformative power of artificial intelligence (AI). The vast majority of enterprises already use it, with 99% of the 1,620 business leaders we surveyed for our **2025 Process Optimization Report** saying their organizations deploy some form of AI. What's more, 73% say their AI investments are delivering the expected ROI, so we seem to be off to a good start.

But most of today's use cases are just scratching the surface of what AI can do. Using GenAI to make developers more productive for example, or create customer support chatbots is undeniably useful. But the ROI from these types of activities is unlikely to be game-changing.

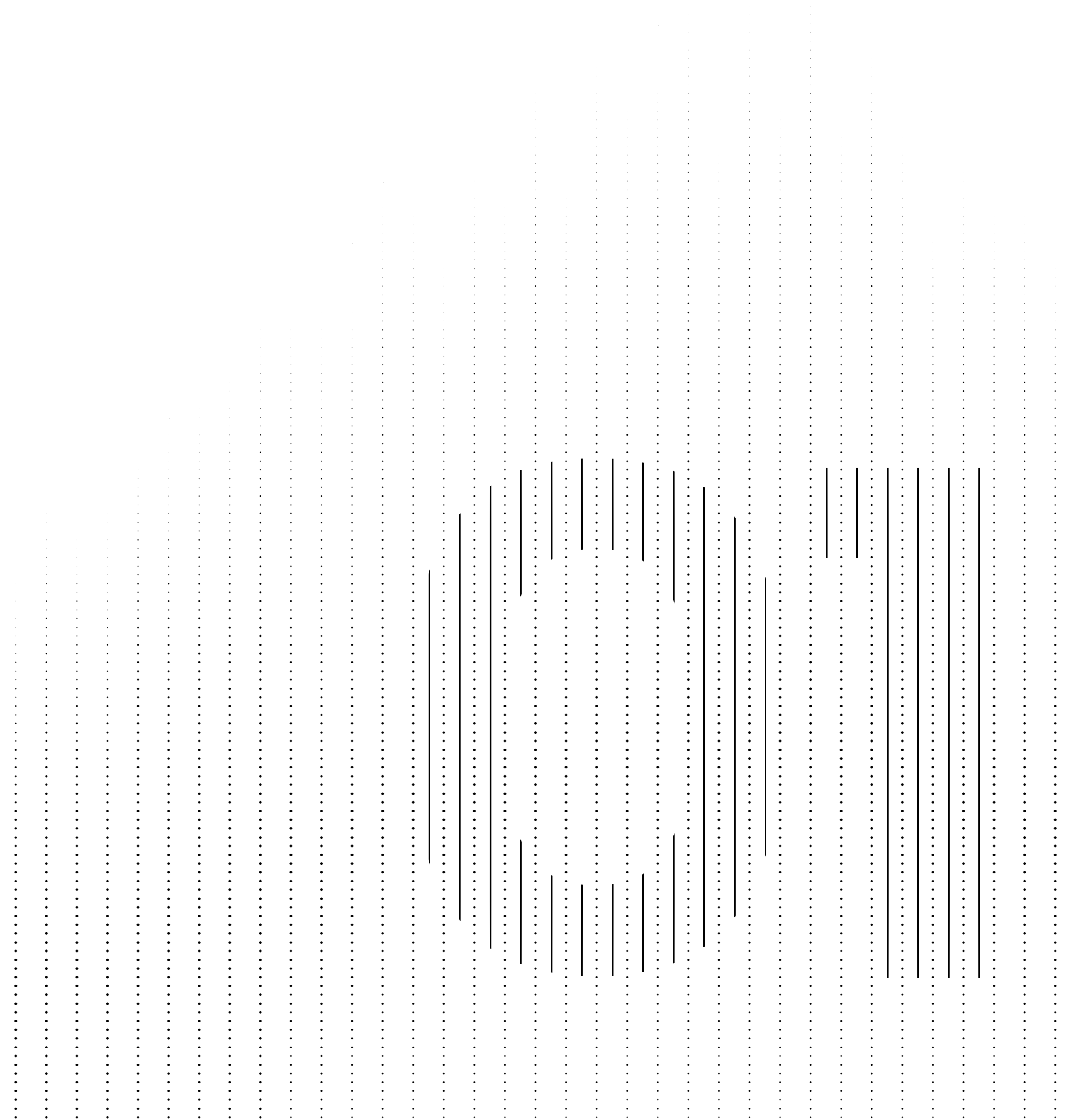
The real ROI from AI will come when businesses apply it to what they do every second of the day, day in and day out. From paying, to collecting, to shipping: potential AI use cases aren't just expansive, they hold game-changing promise. Right now, enterprise AI largely lacks the process understanding and business context it needs to be effective in these and other more strategic applications of AI. (Jump to page 19 to learn about process understanding and business context.)

Surprise, surprise the Process Intelligence company is telling you processes and AI go hand-in-hand. But the vast majority of business leaders agree. **More than half (58%) are concerned the current state of their processes may limit their ability to make AI work moving forward. And almost nine-in-ten (89%) say it's crucial AI has the context of how their business runs to be effectively deployed.** This all means that businesses must understand and optimize their processes to make the most of the AI opportunity which, incidentally, AI can actually help them to do.

In this – the AI edition of the 2025 Process Optimization Report – we'll take a deeper look at how businesses are using AI across IT, Supply Chain, Finance and Shared Services, as well as Process Improvement and Operations. We'll also explore how enterprises are taking action to improve process understanding, so they can give AI what it needs to succeed.

Let's get started.

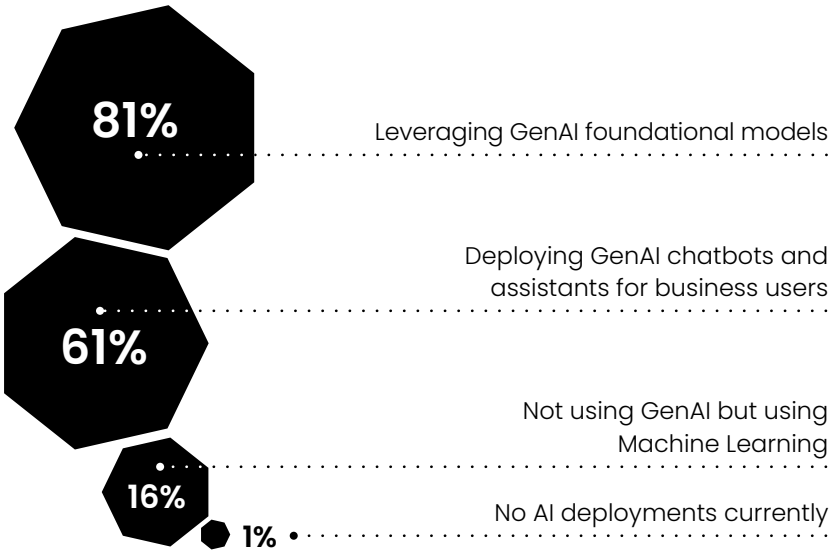
Section one: What enterprises are doing with AI



Ubiquitous AI: GenAI is already everywhere

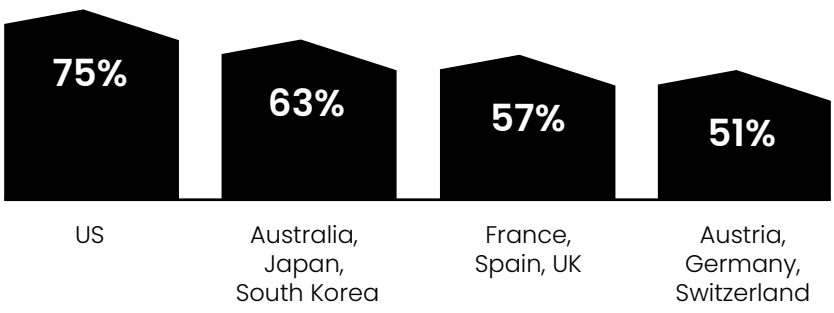
A tiny 1% of business leaders say their organizations are not deploying AI in one form or another. Four-in-five are already using GenAI foundational models for use cases like developer productivity, knowledge management, or customer service. Three-in-five have deployed GenAI chatbots and assistants for business users. **If anyone thinks the AI age is yet to start, this is your friendly wake-up call.**

What enterprises are doing with AI



There are some interesting regional variations in the use of AI. The use of GenAI chatbots and assistants, for example, is far more popular in the US than in the DACH region.

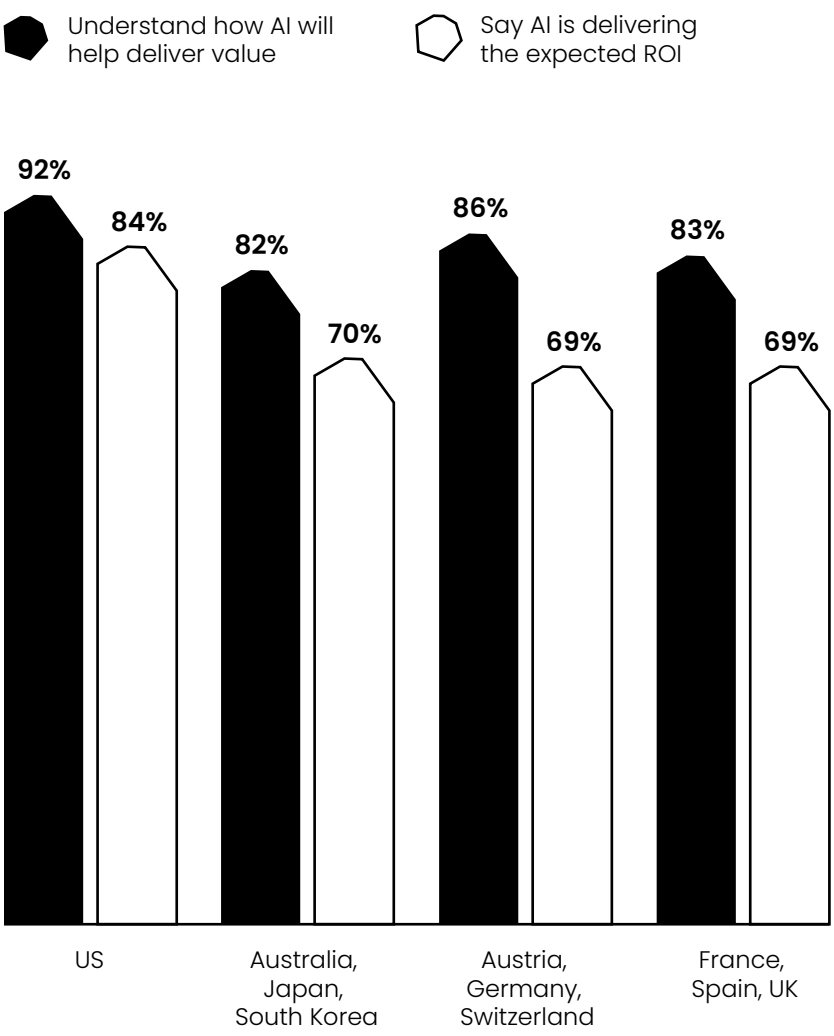
Use of GenAI chatbots and assistants by region



AI ROI expectations: A pivotal year

Almost three-quarters (73%) of business leaders feel their AI investments are currently delivering the expected ROI. And a strong 86% say they clearly understand how AI is going to help their department deliver more value. Once again this confidence in AI ROI and value delivery varies by region, and is strongest in the US.

Regional confidence in AI ROI and value delivery

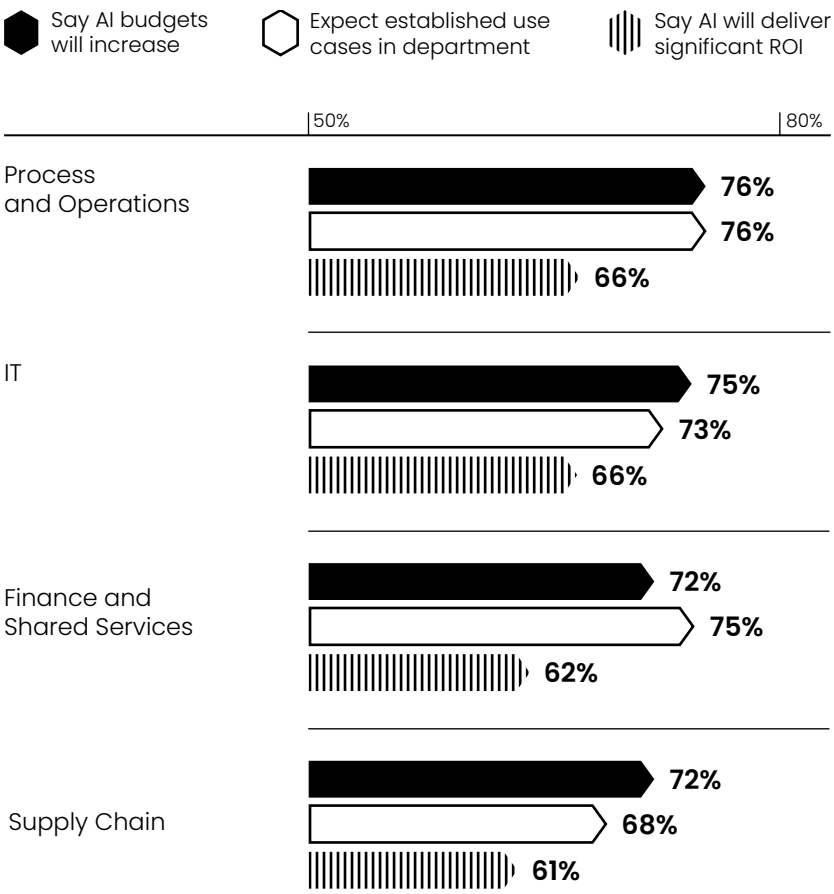


So what about expectations for the future?

2025 is a pivotal year for enterprise AI, with 64% of business leaders saying AI will deliver significant ROI, and 73% saying there will be established use cases in their departments, along with associated policies and usage guidelines, in the next 12 months. Almost three-quarters (74%) expect AI budgets to increase, although 58% say AI spend will come from a central pot rather than each department having its own budget.

These expectations vary slightly between departments. **Process Improvement and Operations leaders have the highest AI expectations for the coming year, while Supply Chain leaders are a little more skeptical.**

Departmental expectations of AI in next 12 months



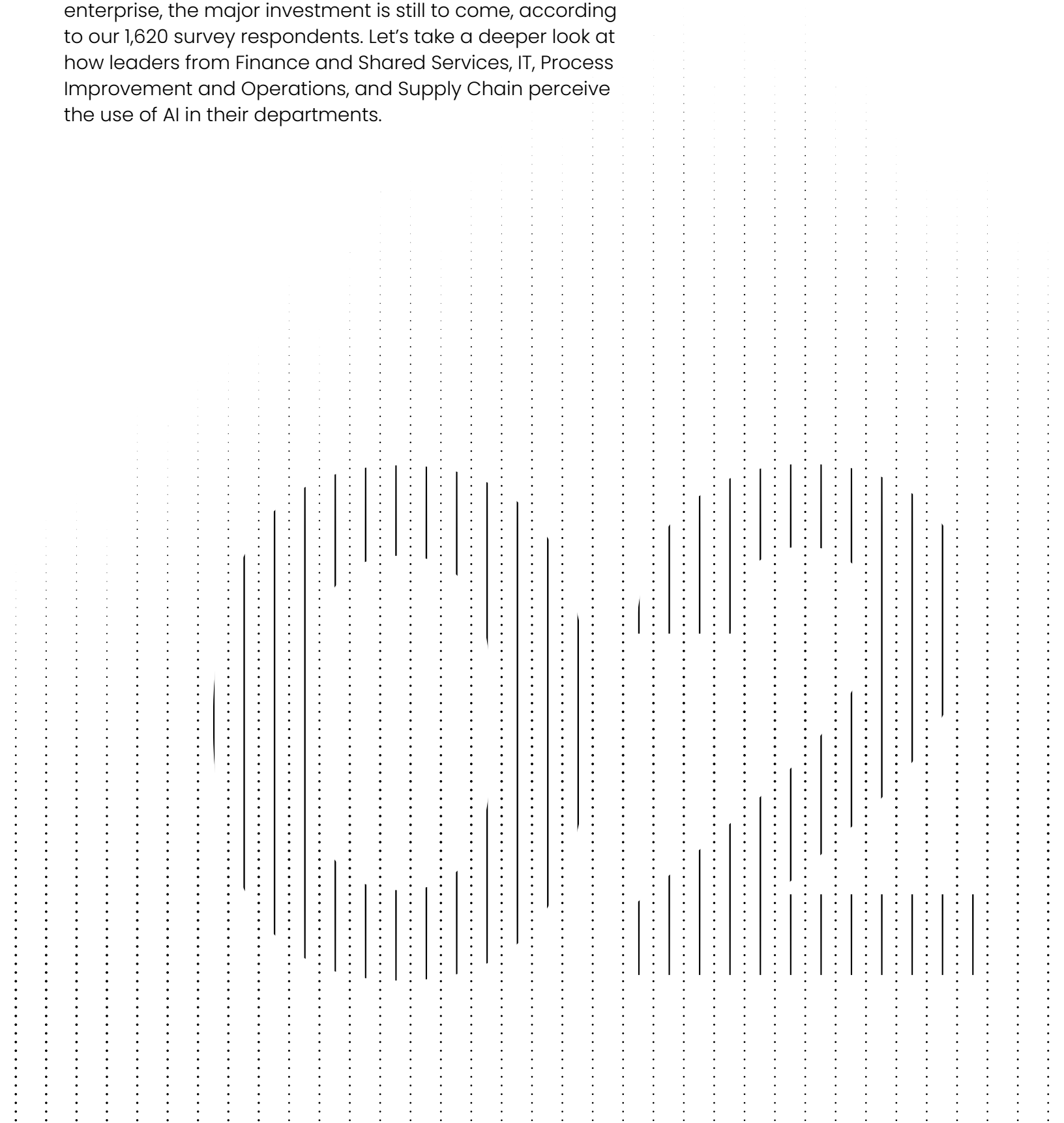
Something most business leaders from all departments and regions agree on is the need to use AI for process improvement. **A strong 81% say AI will be used to directly improve business processes over the next 12 months.**

Looking a little further ahead, AI is seen as one of the greatest strategic opportunities for businesses over the next two years. Implementing AI, automation, and analytics is on par with improving productivity, and placed above improving profitability, increasing revenue, and improving customer experience.

Top strategic opportunities over the next two years

Departmental perspectives on AI

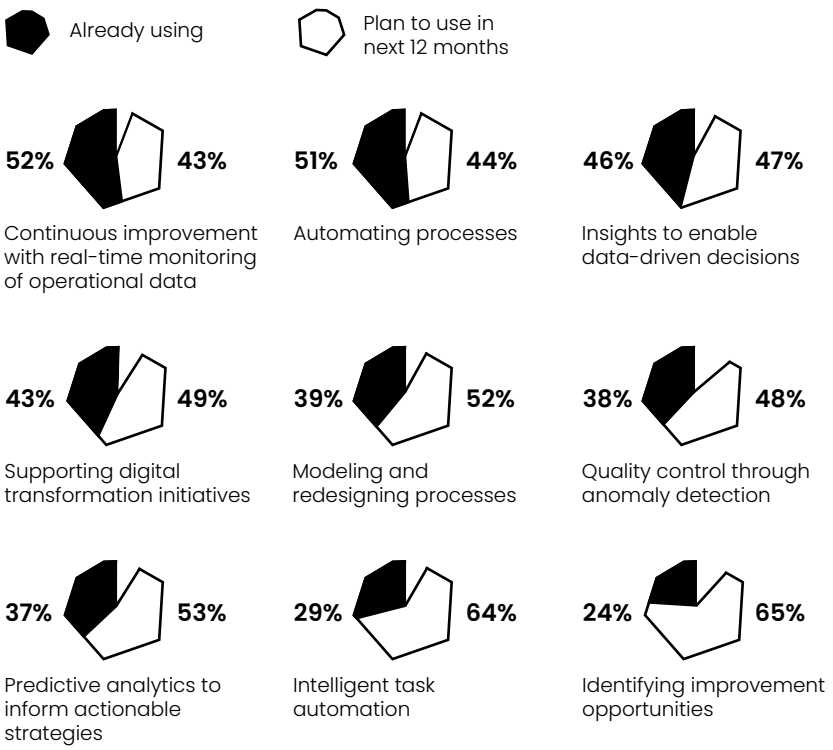
While AI experimentation has already begun across the enterprise, the major investment is still to come, according to our 1,620 survey respondents. Let's take a deeper look at how leaders from Finance and Shared Services, IT, Process Improvement and Operations, and Supply Chain perceive the use of AI in their departments.



Process Improvement and Operations: A focus on intelligent automation

Process Improvement and Operations teams are already using AI in a variety of ways, with more than half currently using AI for both continuous improvement and process automation. Even in areas where use of AI is currently low, such as identifying improvement opportunities, there are plans to harness it in the coming year.

How Process Improvement and Operations teams use AI



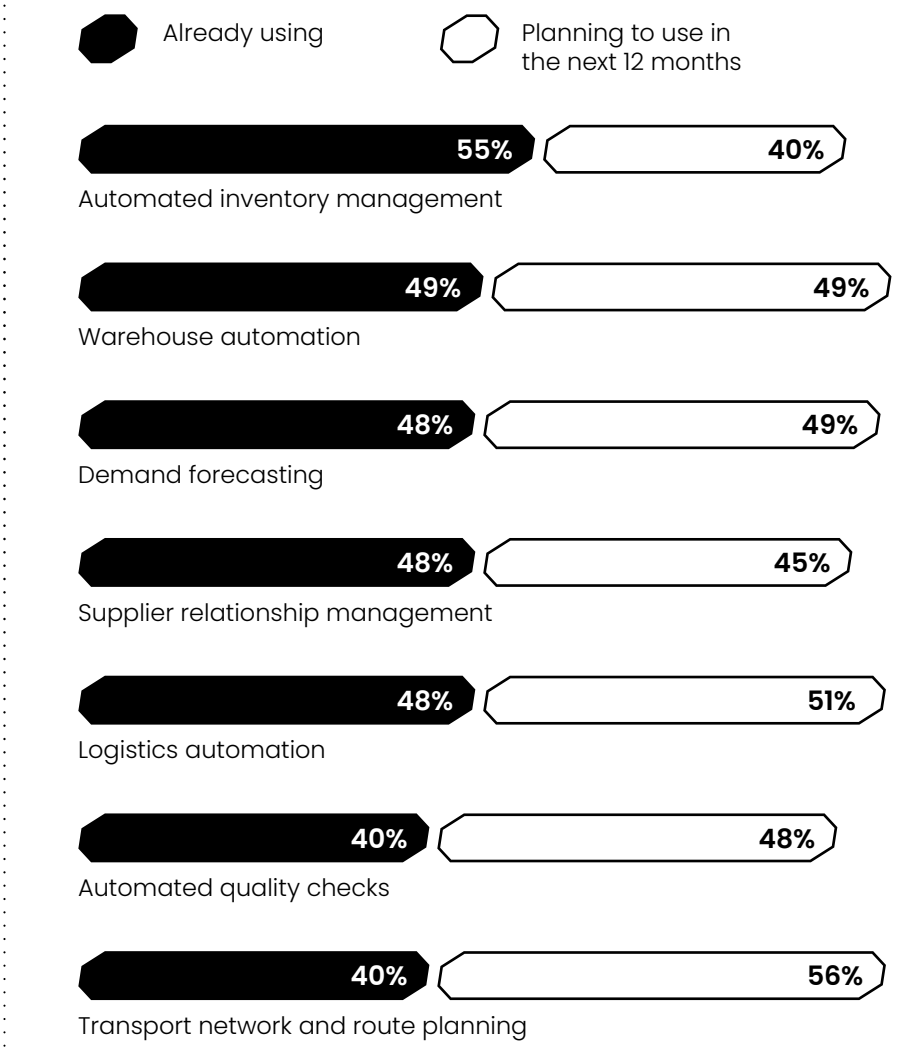
Looking ahead, AI-powered automation will be a key focus, with 89% of Process Improvement and Operations leaders saying intelligent automation will unlock more value than anything else in the next five years.

Read the Process Improvement and Operations Edition →

Supply Chain: A foothold in the warehouse

Supply Chain leaders are experimenting with AI across multiple use cases. Automated inventory management and warehouse automation top the list and are used by around half of supply chain teams. This indicates AI is most firmly established in warehouse environments, but other use cases like demand forecasting and supplier relationship management aren't far behind.

How Supply Chain teams use AI



The intention to increase AI adoption in the near future is strong. For example, only 40% of Supply Chain leaders are currently using AI for transport network and route planning, but 96% say they plan to use it in the next 12 months.

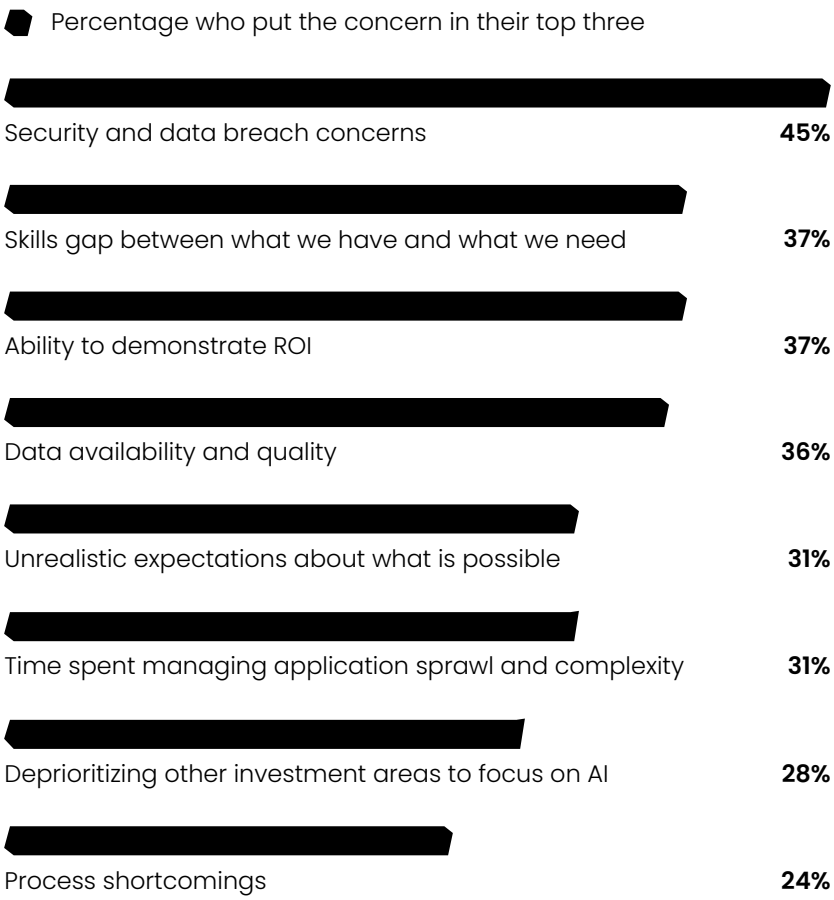
Read the Supply Chain Edition →

IT: Security concerns are paramount

IT leaders understand the significance of AI in technological development, with 87% saying they expect the technology platforms they use to leverage the latest AI developments.

But despite this acceptance of AI's pivotal role, 90% have concerns over the increasing use of AI within their organizations. Security and the increased risk of data breaches is their biggest worry. The ability to demonstrate ROI, and the skills gap between what they have and what they need, tie for second place.

IT leaders' concerns around enterprise AI use



Process shortcomings come relatively low on the list, which indicates IT leaders don't yet fully appreciate how important optimized processes are to effective AI deployment (more on that in section three). Many of the bigger concerns identified, like data availability and quality, can be addressed through process improvement, but IT leaders may not yet be connecting the dots.

Read the IT Edition →

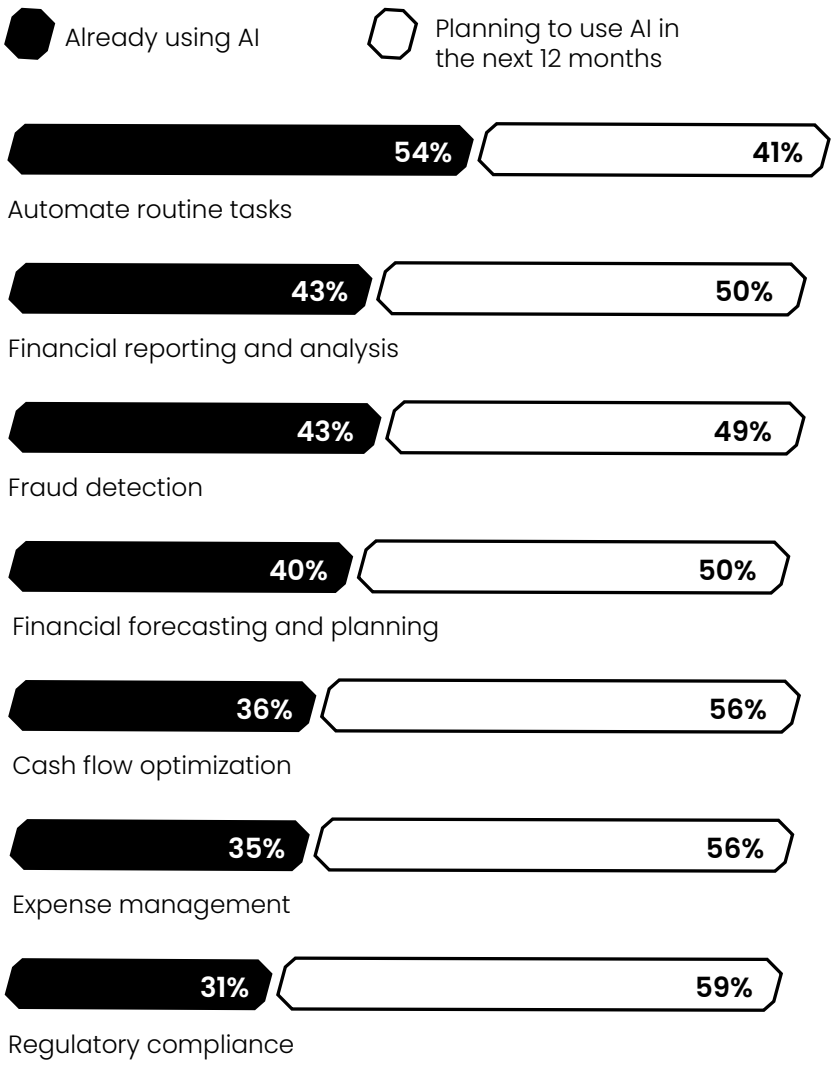
Finance and Shared Services: A mandate for investment

Finance and Shared Services leaders have a positive outlook on the use of AI in their departments, with 70% saying they have a mandate to invest in AI-powered technologies to drive business efficiency.

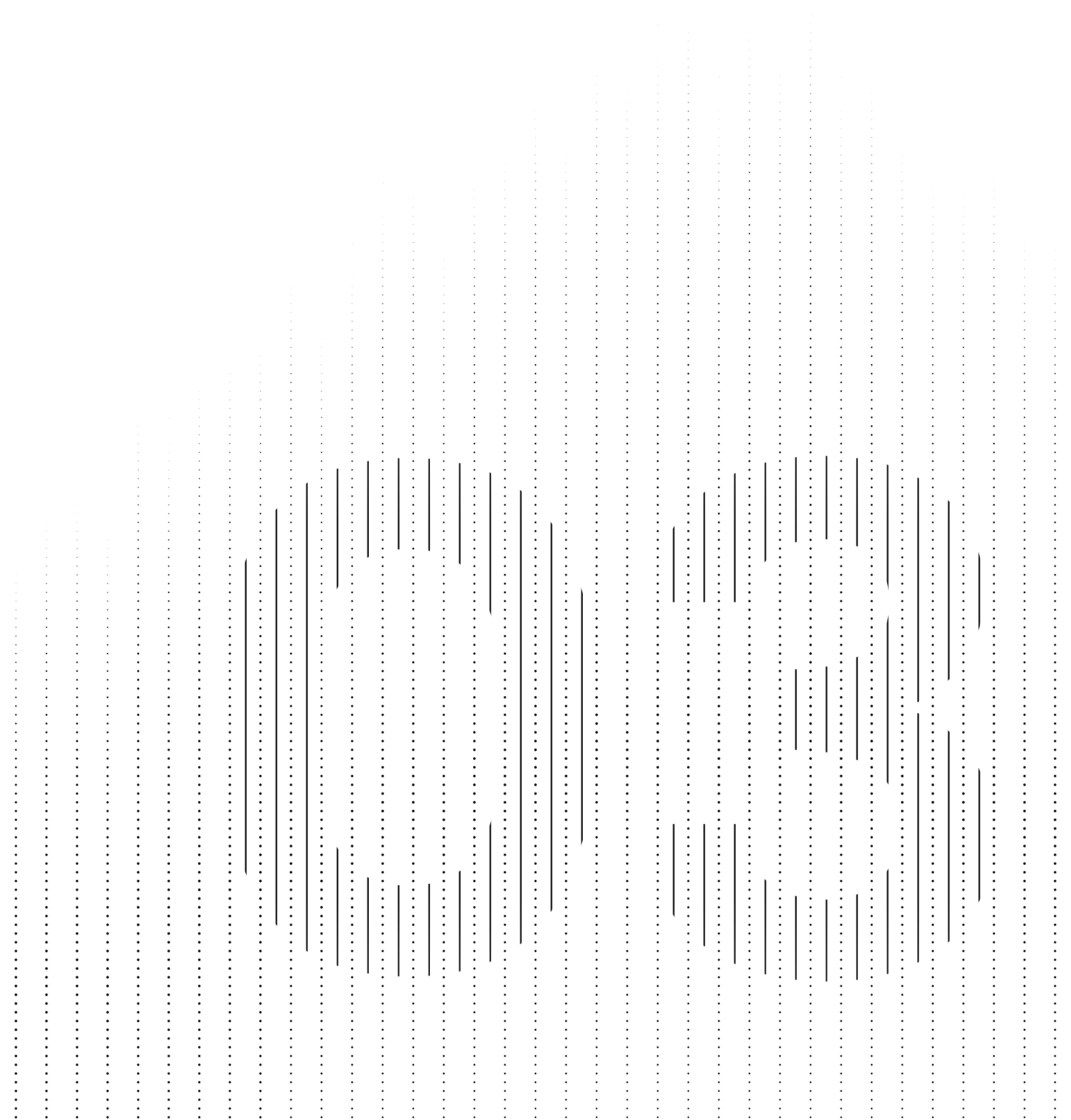
The intention to push forward with adoption is evident when we look at how they plan to use AI in the next 12 months. Right now, automating routine tasks is the most common AI use case, already being tackled by over half (54%) of Finance and Shared Services departments. Teams are also starting to invest in AI for a range of additional use cases from fraud detection and cash flow optimization to regulatory compliance. But over the next 12 months at least 90% of Finance and Shared Services leaders intend to implement AI for every one of these use cases – even those where AI is currently less commonly deployed.

How Finance and Shared Services teams use AI

Read the Finance Edition →



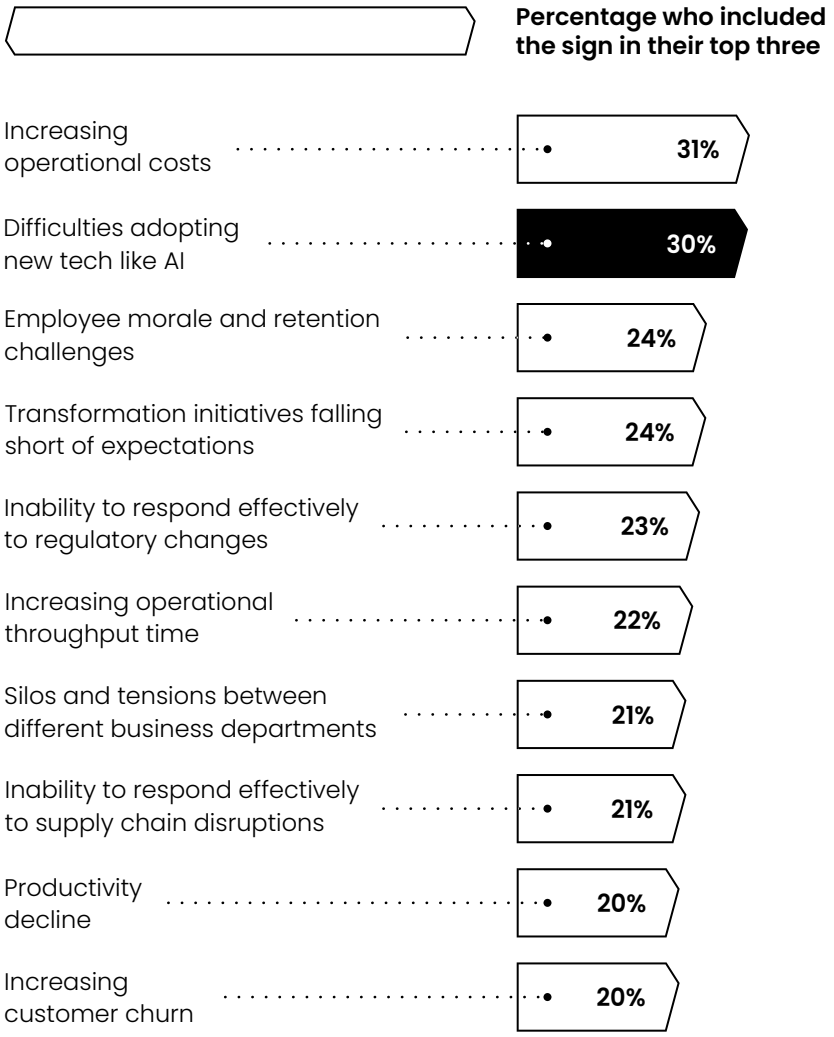
There’s no AI without PI



AI success needs process understanding *and* context

A lack of process understanding may already be hindering business adoption and deployment of AI. When we asked business leaders to indicate the three biggest warning signs that process understanding in their organization isn't quite where it should be, difficulties adopting new tech like AI was one of their most common answers, included in the top three by 30%.

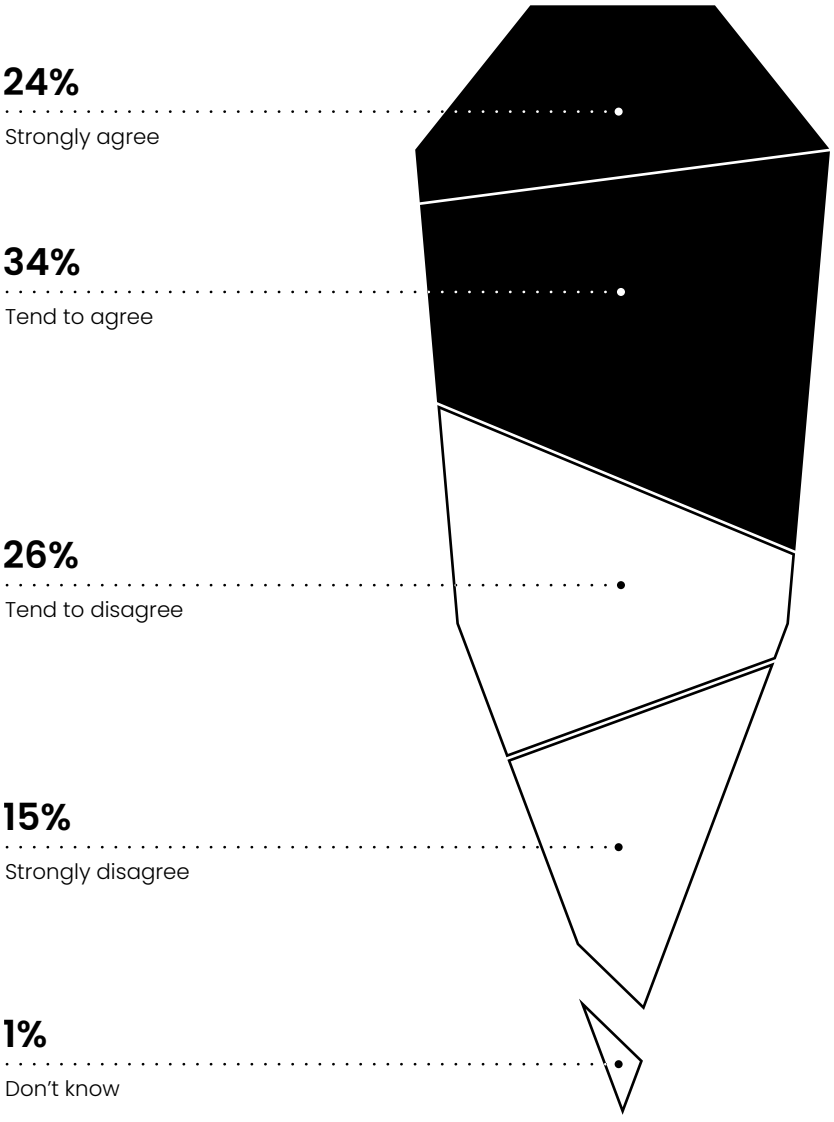
Ten signs organizations don't understand their processes



What's more, **the majority (58%) of business leaders are concerned that the current state of their processes may limit their ability to make AI work effectively for their organization.** Almost a quarter (24%) strongly feel that this is the case.

Process shortcomings may limit value from AI

Statement: We're concerned the state of our processes may limit the value we can achieve with AI

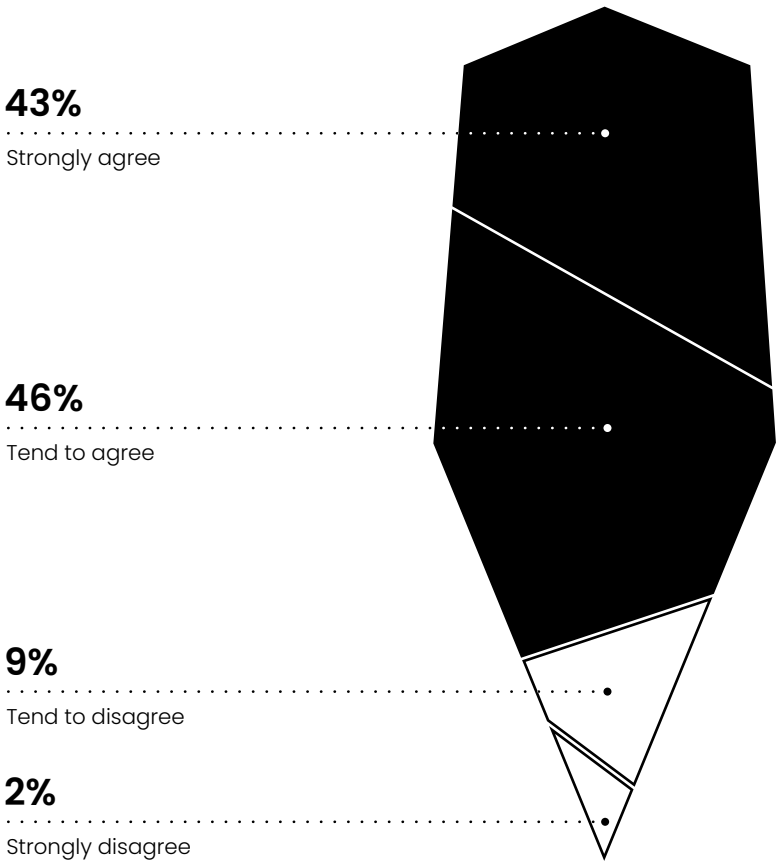


So leaders clearly see the need to understand their processes, and to improve the way those processes run, to get AI working for the enterprise.

More specifically, they also understand the need for AI to have the context of how their business runs, including how they calculate KPIs, what their policies and procedures are, and how their organization is structured. The vast majority (89%) say it's crucial AI has this business context to be effectively deployed. What's more, 43% strongly believe this is the case, while only 2% strongly disagree.

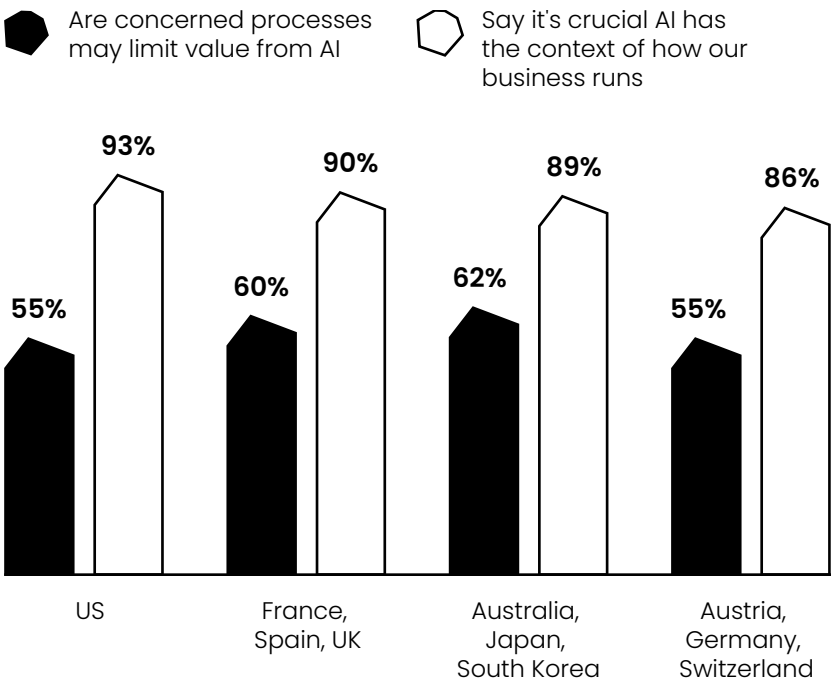
Effective AI deployment needs business context

It's crucial that AI has the context of how our business runs to be effectively deployed



There are some regional variations in these perceptions. Business leaders in APAC countries are most likely to be concerned that a lack of process understanding will prevent them making the most of AI. And those in the US are most likely to say effective AI deployments require specific business context.

AI, context, and concerns by region



The link between processes and effective AI is undeniable. Read on to discover how Celonis Process Intelligence makes AI smart and successful for the business:

AI without PI isn't smart enough

For AI to be relevant and effective for the enterprise, it needs both process understanding and business context.

1. **Process understanding:** how activities are sequenced as a process, including how they relate across systems, what's happening upstream, downstream, and in parallel – as well as knowing if activities are happening on time and in the right order.

2. **Business context:** institutional knowledge including business-specific rules, benchmarks, and KPIs that can be codified and made accessible to AI so it can be deployed for strategic use cases.

Celonis Process Intelligence (PI) uses process mining to create a digital twin of a business's end-to-end processes, and uses AI algorithms to show teams where value opportunities lie and how to capture them. In addition, PI codifies and enriches business context to make it accessible to AI tools, such as agents, co-pilots, and assistants.

Consider the GPS you use every day to find your way around. It's an incredibly useful technology, but it's only as effective as the map data that feeds it. No system provides this kind of input for the enterprise today. But PI can. By creating a map of the enterprise, connecting data across your systems, and making sense of it, PI enables AI to understand how your organization works and take action to run it effectively.

Imagine you want to build an AI solution to automatically handle credit blocks on orders. Credit blocks are set for a good reason, but if they aren't addressed quickly enough orders get delayed and customers become frustrated.

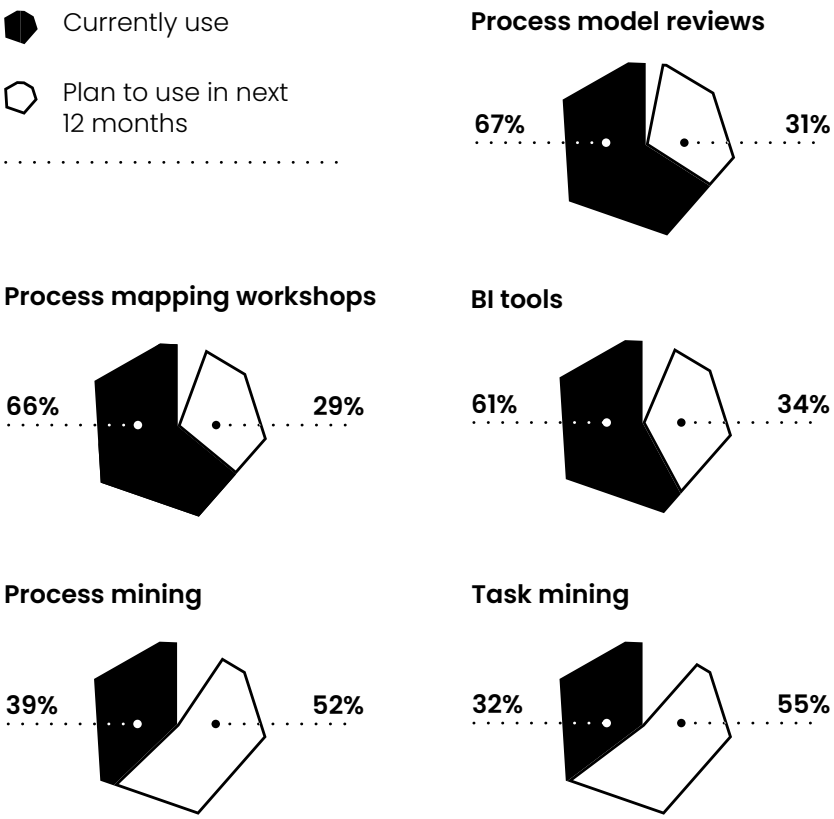
For AI to unblock the order, it needs to know to look at the order in the first place. Then it has to understand why the block was set, if this is normal or not, if the order is at risk of a late delivery, how to prioritize it, and how to handle the reason for the block.

Combining process understanding and business context, Celonis makes it possible for AI to do all this. AI is made smart enough to look at the order, understand the reason behind the block, assess the risk of late delivery, take customer priority into account, and determine the right steps to move the order forward.

What Process Intelligence makes possible

Businesses are exploring a range of tools and tactics to increase process visibility, which is the first step in gaining the Process Intelligence (PI) required to make AI work. It's particularly encouraging to see 39% of businesses are already using process mining – the technology that enables PI – and a further 52% plan to adopt it in the next 12 months.

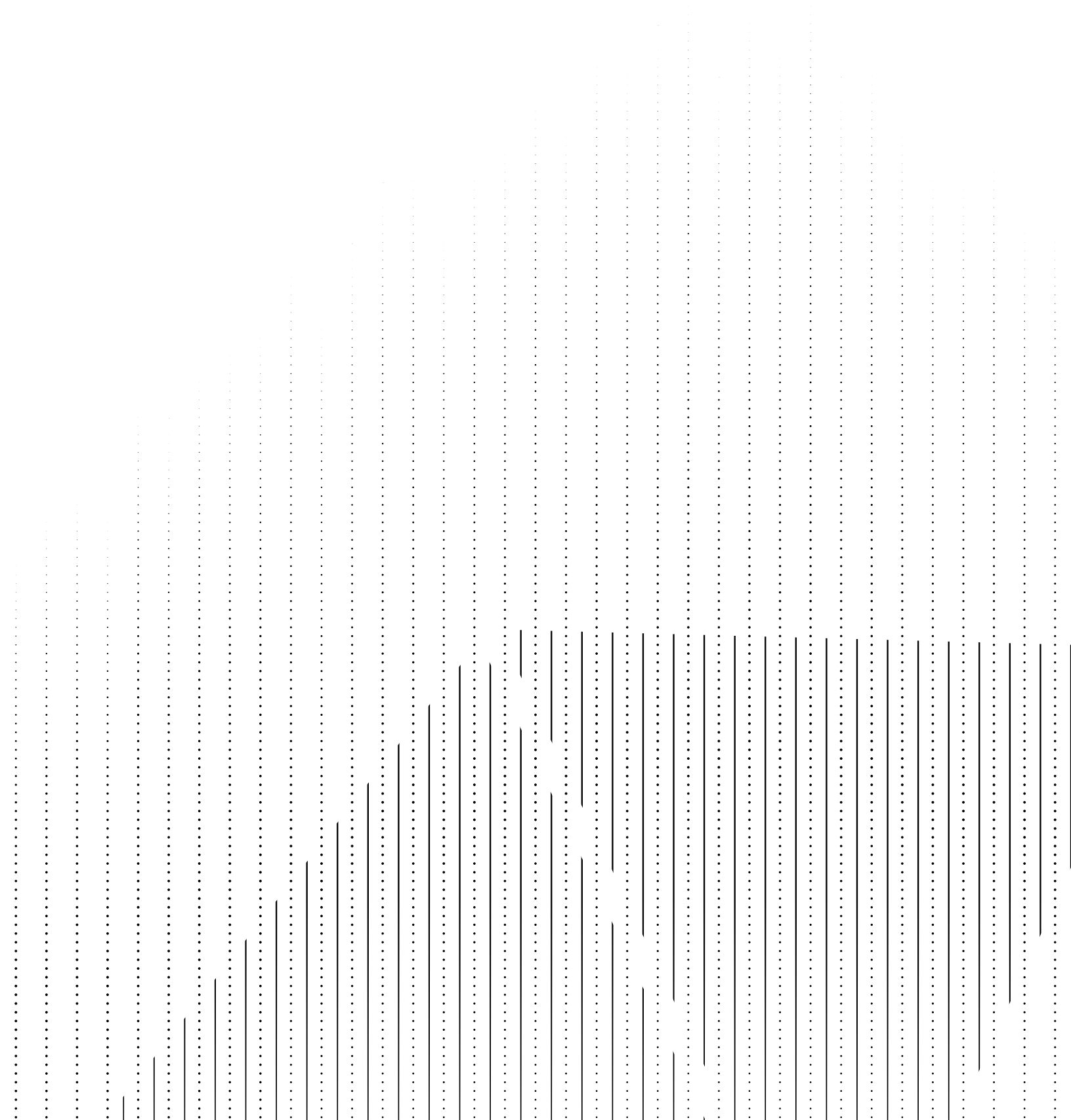
How enterprises are gaining process visibility



Process mining visualizes, analyzes, and optimizes business processes. It reveals why processes aren't working the way they are designed to, provides the information needed to improve them, and enables PI.

As businesses across the world get comfortable with AI, they'll want to move past early deployments of GenAI models and chatbots, and use the technology to generate substantial ROI. With PI on their side, leaders can understand their processes and give AI the business context it needs for more advanced, strategic use cases that will deliver a potentially game-changing impact.

What’s next?



Right now, enterprises like yours, and people like you, are using Celonis Process Intelligence to gain a better understanding of processes, act on opportunities to improve how their business runs, create value, and make AI work.

Looking for inspiration and information to help you do the same?

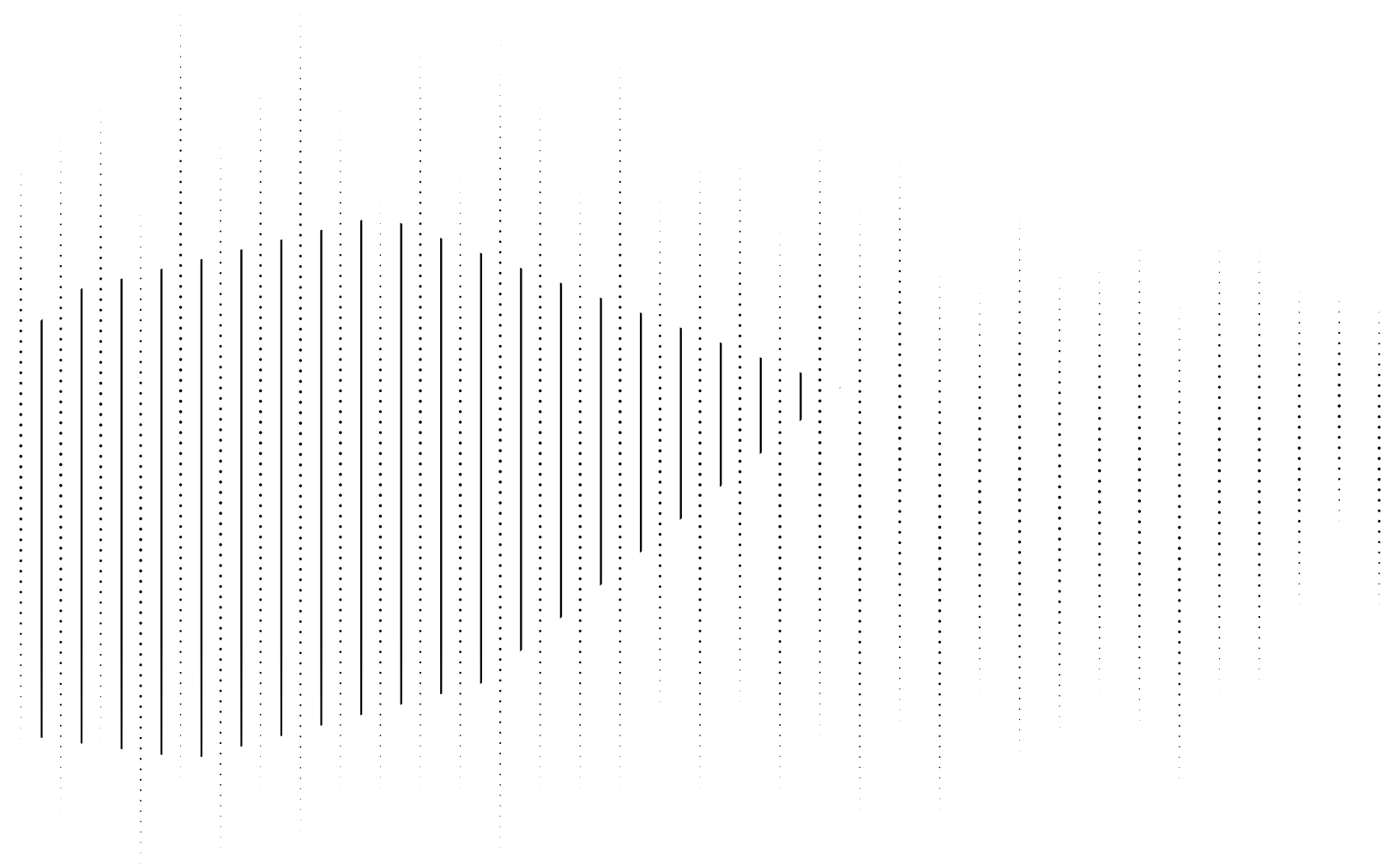
- Get up close and professional with **Celonis Process Intelligence**.
- Check out **Process Mining For Dummies**, Celonis Special 2nd Edition.
- Discover how **PI works with AI copilots, assistants, and agents.**

Plus check out the full **2025 Process Optimization Report, 'Making processes work'**, to find out more about what business leaders are doing in pursuit of productivity, profitability, and effective AI.

Survey sample

The research was conducted by Insight Avenue, an independent, third-party, specialist B2B and technology research consultancy. A total of 1,620 interviews – spread between four regions and four departments – were conducted during July and August 2024. Business leaders were interviewed from organizations with revenue of $500m+ across a range of sectors.

The sample used in this report is made up as follows:



Department

Supply Chain	**25%**
Finance / Shared Services	**25%**
Operations / Process Improvement	**25%**
IT / Digital	**25%**

Level of seniority

Board / C-level	**6%**
VP level	**10%**
Head of Department / Director	**34%**
Senior manager	**50%**

Organization revenue

$500m - $2bn	15%
$2bn - $10bn	80%
More than $10bn	5%

Industry sector

Life sciences	4%
Pharma	3%
Oil & gas	10%
Retail	9%
CPG / FMCG	8%
Manufacturing	8%
IT / technology	11%
Automotive	9%
Chemicals	5%
Banking	10%
Insurance	7%
Logistics	6%
Public sector	5%
Utilities	5%

Region

US	**25%**
Europe (France, Spain, UK)	**25%**
DACH (Austria, Germany, Switzerland)	**25%**
APAC (Australia, Japan, South Korea)	**25%**

Country

Australia	**10%**
Austria	**5%**
France	**7%**
Germany	**15%**
Japan	**7%**
South Korea	**7%**
Spain	**5%**
Switzerland	**5%**
UK	**14%**
US	**25%**

About Celonis

Celonis makes processes work for people, companies, and the planet. The Celonis Process Intelligence Platform uses industry-leading process mining and AI, and augments it with business context to give customers a living digital twin of their business operation. It's system-agnostic, without bias, and provides everyone with a common language for understanding and improving businesses, and enabling AI to be effective and relevant for the enterprise. Celonis empowers its customers to continuously realize significant value across the top, bottom, and green line.

Celonis is headquartered in Munich, Germany, and New York City, USA, with more than 20 offices worldwide.

Find out more at **celonis.com**