



Work, workforce, workers

Reinvented in the age of generative AI

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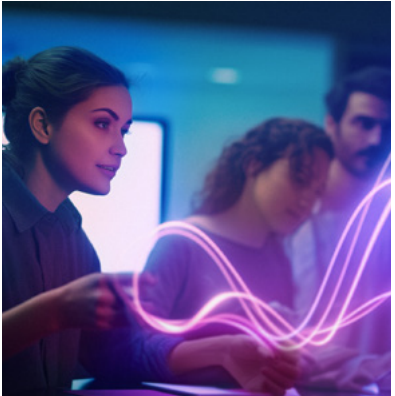
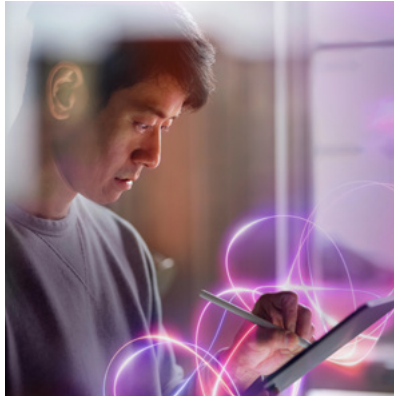
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Preface

Generative AI has burst onto the scene. It appeared fast and is evolving even faster. To date, our teams have already worked on over 700 client projects. We're seeing what success looks like—and sharing it here.

We know that achieving gen AI's full potential hinges not just on a strong data foundation, but also on leaders' willingness to lead and learn differently. This makes it possible to navigate the risks and seize the huge opportunity before us to reinvent work, reshape the workforce and prepare people, responsibly. No other modern technology has impacted these areas to such a degree—and we're all about to experience it. However, similar to when digital came on the scene, the rush for pilots and experimentation is too often leaving robust talent strategies behind.

To spotlight the importance of focusing on talent early, our research brings data to the groundbreaking reality that we're seeing every day. As you dive into these insights, know that this is the start of a journey like no other. We're exploring how gen AI is changing the game and how we can all come out ahead – as businesses, as leaders and as people.

Here's to exploring the age of generative AI together.

Executive summary

Work reinvented, workforce reshaped, workers prepared

“Generative AI has the potential to significantly change the nature of work across various industries and fields. While generative AI has the potential to bring about numerous benefits, it also raises ethical and societal concerns, including issues related to job displacement, data privacy, protection of intellectual property, bias and the responsible use of AI. The impact of generative AI on work will depend on how it is implemented, regulated and integrated into various industries and organizations.”

If the paragraph on the left sounds like a robotic answer to the question, “How will generative AI (gen AI) change work?” that’s because it is—it’s a response generated by ChatGPT. While it’s correct to a degree, this answer overlooks how gen AI’s impact on value chains will fundamentally transform the nature of work, reshaping how businesses deliver value and better experiences for employees and customers. Such details and insight are ones that only humans can bring to monumental questions such as this. An even better answer is much shorter:

It depends on people and how they use it.

More specifically, it depends on leaders having the courage, knowledge and understanding to shape the future. They will need to prioritize human-centered change efforts and learn in new ways to scale this groundbreaking technology responsibly, to create value and to ensure that work improves for everyone. This means setting and guiding a vision for how to **reinvent work, reshape the workforce and prepare workers** for a generative AI world, while building a resilient culture to navigate continuous waves of change.

Invest in people to reinvent work

The impact and importance of what people do with generative AI today and tomorrow cannot be understated. In this age, gen AI is influencing more than just productivity; it's impacting processes across the value chain, changing the work itself.

Due to its ubiquity across job types and potential to create exponential impact,¹ gen AI is poised to provide the most significant economic uplift and change to work since the agricultural and industrial revolutions. The early industrial revolution, for example, was marked by mass production and standardized outputs. The age of gen AI will be defined by not only productivity gains but also by enhanced human creativity and potential to shape more innovative employee and customer experiences.



For the first time in history, we are embracing a generation of technology that is “[human by design](#).” Gen AI’s effectiveness hinges on human input to drive quality outputs—whether they’re straightforward, like the draft of an email, or complex, like a financial forecast. This shift will lead to a reinvention of work with more human-centric processes across the entire value chain. By synthesizing data, comprehending natural language and converting unstructured data into actionable insights, gen AI is democratizing business process redesign, empowering everyone—from frontline workers to lab scientists to design professionals—to reshape their own workflows.

Gen AI can also bring workers closer to their customers. Imagine a banking scenario where gen AI transforms the customer experience: from using AI-powered analytics to gain a comprehensive view of customer needs, to customizing financial products and services based on those needs. This end-to-end change not only streamlines operations; it also helps bankers know their customers better, identify new products and improve experiences for both customers and employees. All these outcomes positively impact the bottom-line.

In fact, our research shows that generative AI offers a trifecta of opportunities: it can accelerate economic value *and* increase productivity that drives business growth, while *also* fostering more creative and meaningful work for people.

Comparative analysis of global gen AI adoption and innovation scenarios shows that more than **\$10.3 trillion in additional economic value** can be unlocked by 2038 if organizations adopt gen AI responsibly and at scale (industry by industry, value chain by value chain).² This potential is reflected in CxO optimism, with most believing gen AI will ultimately **increase their company’s market share**, and 17% anticipating an increase in market share by 10% or more.³

Most organizations view gen AI as a path to greater innovation, presenting more of a revenue-growth play than a cost-reduction play. And when it comes to the workforce, [Reinventors](#) (representing 9% of organizations) are 2x more likely than other organizations to anticipate productivity gains of 20% or more in the next three years. And two out of three strongly agree that, with gen AI, **work will become more fulfilling and meaningful**.⁴

95% of workers see value in working with gen AI—but **their top concern is that they don’t trust organizations to ensure positive outcomes for everyone**.⁵

Our research explored the factors that contribute to this trust gap. Currently, three-quarters of organizations globally lack comprehensive strategies and initiatives to ensure positive employee experiences and outcomes with gen AI.⁶ And two-thirds of CxOs we surveyed confess that they are ill-equipped to lead this change.⁷ Misaligned perceptions between leaders and workers also erode trust. When it comes to job security, 58% of workers are worried,⁸ yet less than one-third of CxOs feel job displacement is a concern for people.⁹ There's another disconnect when it comes to well-being, with 60% of workers concerned that gen AI may increase stress and burnout,¹⁰ compared to only 37% of leaders who see this as an issue.¹¹ This lack of trust puts the trifecta of opportunities at risk.

Despite 94% of people saying they are ready to learn new skills to work with gen AI,¹² only 5% of organizations are actively reskilling their workforce at scale.¹³

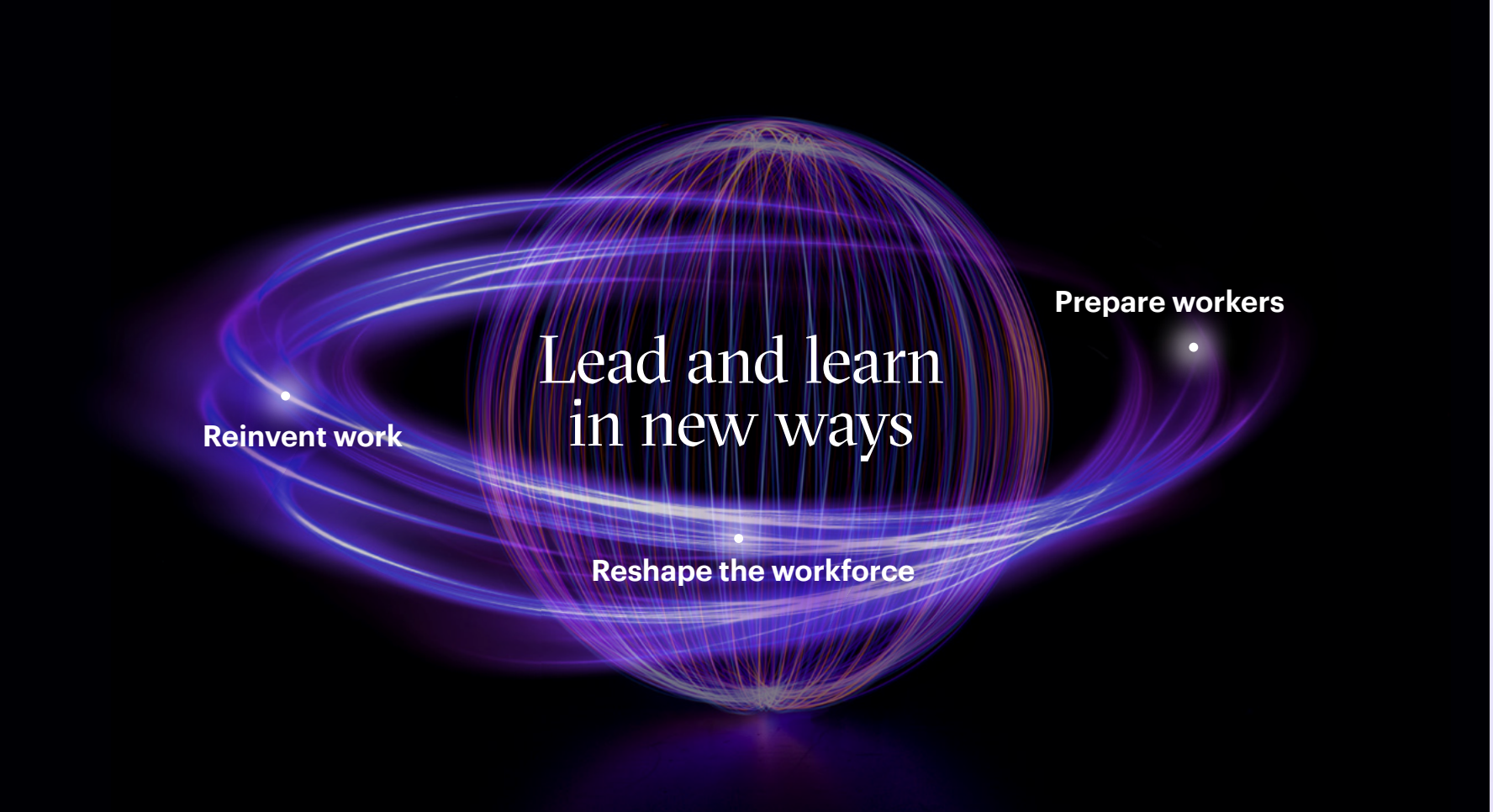
There's a way, however, for leaders to close the trust gap and accelerate gen AI integration: Look at and emulate how leading organizations are leveraging gen AI in ways that are better for business *and* better for people.

Follow the Reinventors

Accenture's research reveals that of the 9% of organizations that have achieved the capability for continuous reinvention (Reinventors), nearly half (47%) of them are already thinking bigger—recognizing that their processes will require significant change to fully leverage gen AI. And more than half (52%) are already taking action to reshape the workforce by redesigning jobs and roles around gen AI. Key to all of this: **three-quarters are actively involving their people** in their enterprise change efforts, while reskilling people. **These organizations are breaking down silos and making data accessible to all employees, fostering transparency and building trust among their people.**¹⁴

Our research also highlighted the need to meet peoples' fundamental human needs, so they feel Net Better Off¹⁵ at work. Why? Because **it is a clear pathway to strengthening trust and getting people ready for, and comfortable with, gen AI.** Indeed, by helping their people deepen their trust in the company and their colleagues, build market-relevant skills, work with purpose and strengthen their emotional, physical and financial health, an organization can unlock two-thirds of an individual's potential, which can lead to a 5% revenue boost.¹⁶

In this age of gen AI, leaders should view their people not as passengers on the journey, but as navigators. Reinventors recognize this. And with a small percentage of organizations currently leading the way, there's substantial opportunity to be among the front-runners. Success relies heavily on leaders who act with compassion and humility, and who create the conditions so that their people feel Net Better Off at work.



Our gen AI “GPS” later in this paper shows how to navigate the journey ahead and is focused on four accelerators. It emphasizes **leaders committed to continuous, deep learning and leading in new ways**, along with human-centered change management to **reinvent work, reshape the workforce** and **prepare workers** so they are resilient for whatever tomorrow holds.

Before diving into the gen AI GPS, we set the stage by examining the current state of gen AI, as well as the conflicting views surrounding it. An understanding of both is essential to fully realize the potential of gen AI for organizations, people and society.

“Gen AI heralds the most significant disruption to organizations—and, in my case, to the newsroom—in the last 25 years. Approached responsibly, it could help the most important and respected media companies provide an even better and more accurate service and product going forward. It’s the people, not technology, who understand the purpose of the company and what it’s trying to achieve.”

William Lewis, Chief Executive Officer and Publisher,
The Washington Post

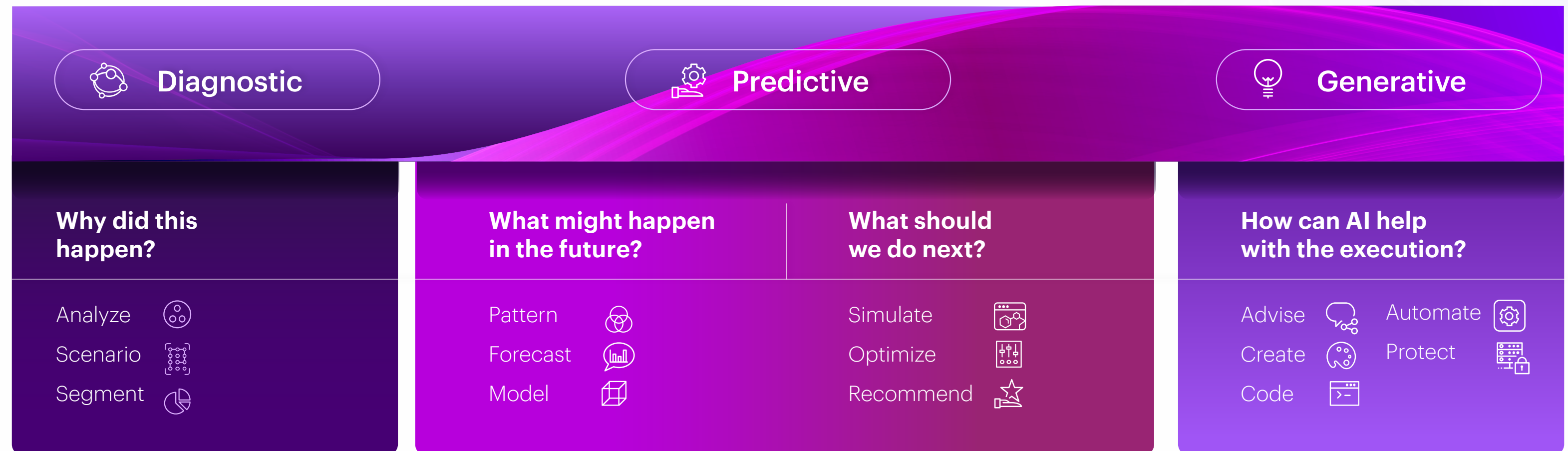
Where we are today

The gen AI state of play

AI's evolution has been marked by three phases of significant advancements. The **Diagnostic Era** was largely defined by the introduction of machine learning. The **Predictive Era** gave us the ability to make increasingly accurate forecasts about everything from operations to customer behavior. And late 2022 saw the dawn of the **Generative Era**. Now, machines aren't just predicting with high accuracy, they're also generating creative content and offering personalized suggestions (see Figure 1).

Figure 1. Welcome to the age of generative AI

Source: Accenture 2024



These are very early days for generative AI, with most companies still in the planning and experimental stages. But looking across the landscape, several key trends are emerging, reflecting gen AI's influence on business reinvention, workforce dynamics, regulatory environments, executive perspectives and employee sentiment. These trends are important markers for understanding gen AI's current standing, as well as its future potential for transforming industries, work and employee experiences.

- **Driving reinvention:** Gen AI is seen as one of the main levers for enterprise reinvention at 81% of companies we surveyed,¹⁷ **yet two-thirds of CxOs do not have the right skills and capabilities needed to successfully reinvent their organizations.**¹⁸ Data strategy and technology infrastructure emerge as top concerns for implementing gen AI, with nearly half of CxOs believing they'll need to improve their data strategy to leverage gen AI effectively.¹⁹
- **Magnitude of impact:** Our modeling shows that 44% of working hours in the US are in scope for automation or augmentation.²⁰ This percentage is even higher in countries with greater numbers of knowledge- and

language-task-based²¹ workers relative to the full working population, like in the UK (where 47% of all working hours will be impacted). There's variation across sectors too (see Figure 2 on the next page). It's also important to note that people with lower levels of digital skills, less career experience and less formal education could be more negatively impacted, which only highlights the risk of exacerbating the digital divide.²²

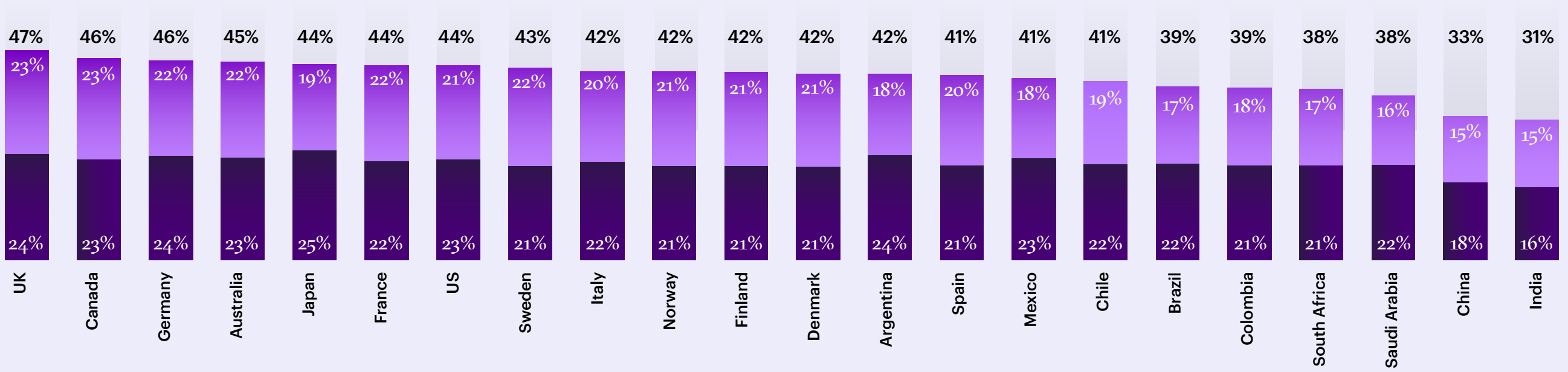
- **Regulatory response:** Some would argue that regulators view gen AI as a proverbial horse having sprinted from the barn, citing for example the Biden administration's late-October executive order requiring new safety assessments, equity and civil-rights guidance and research on the labor market.²³ Mere weeks prior, China introduced several regulations specifically targeting gen AI.²⁴ And in December 2023, the European Parliament passed the AI Act which, along with risk-based regulations, sets transparency requirements for gen AI usage.²⁵ Increasingly, countries and regions recognize the need to urgently establish regulatory frameworks, including robust IP protection and usage agreements, for rapidly evolving AI technology.

“If I have a concern anywhere, it's that people will underappreciate the need to have human involvement in the creation of these tools—not only human involvement but the most diverse human involvement, or else we're just replicating the bias of human decision making.”

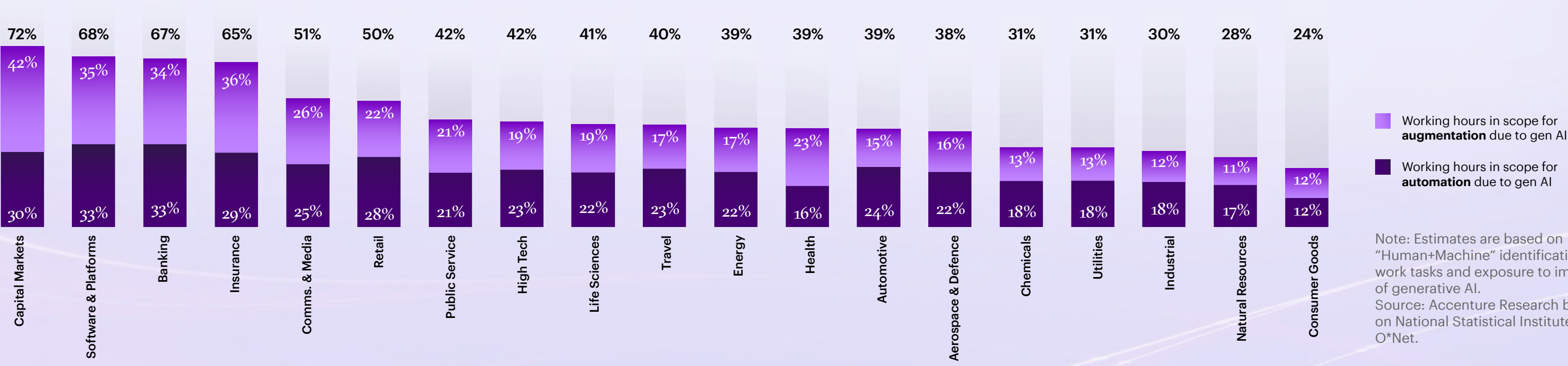
Jacqueline Welch,
Executive Vice President & Chief Human
Resources Officer, The New York Times

Figure 2. A significant portion of working hours will be impacted (either automated or augmented) by generative AI

22 Countries:



19 industries:



“The uncertainty surrounding the emergence of new technologies can often evoke fear. One of the best ways to combat fear is to educate and get people involved, and the companies that do so will have a better chance at creating increased value for themselves and their customers.”

Christy Pambianchi, Executive Vice President & Chief Human Resources Officer, Intel

“[Gen] AI can be useful, but at times it can also be overwhelming. Because you always get that feeling that if you are leveraging AI to work or get your work done, there is a real possibility that AI can replace you.”

IT manager, Australian software & platform company

- **CxO sentiment:** Already, 86% of CxOs are using gen AI to some degree in their work and nearly all believe gen AI will be transformative for their company and industry. All CxOs surveyed—100%—anticipate changes to their workforce, e.g., growing or reducing headcount and implementing plans to reskill.²⁶ **Yet only one in three leaders believe they have the technology expertise or feel they can tell a compelling transformation narrative to lead the change that’s needed.**²⁷ This gap in knowledge and confidence impacts both trust and transparency, which is critical to successfully navigate gen AI transformation efforts at scale.
- **Employee sentiment:** 95% of employees we surveyed see value in working with gen AI, and 82% say they already have some understanding of the technology. **However, their biggest concern is trusting their organization to ensure positive outcomes for all.** Further findings highlight this concern: 60% of employees worry that gen AI may increase stress and burnout, 58% feel insecure about their job and 57% need clarity on what this technology means for their careers.²⁸

Given the progress and trends already witnessed, and perhaps even as a result, there are conflicting views about the risks, benefits and tradeoffs involved with using gen AI at scale. We see this as an issue that must be unpacked and understood to realize the full, positive potential of gen AI.

The trust gap

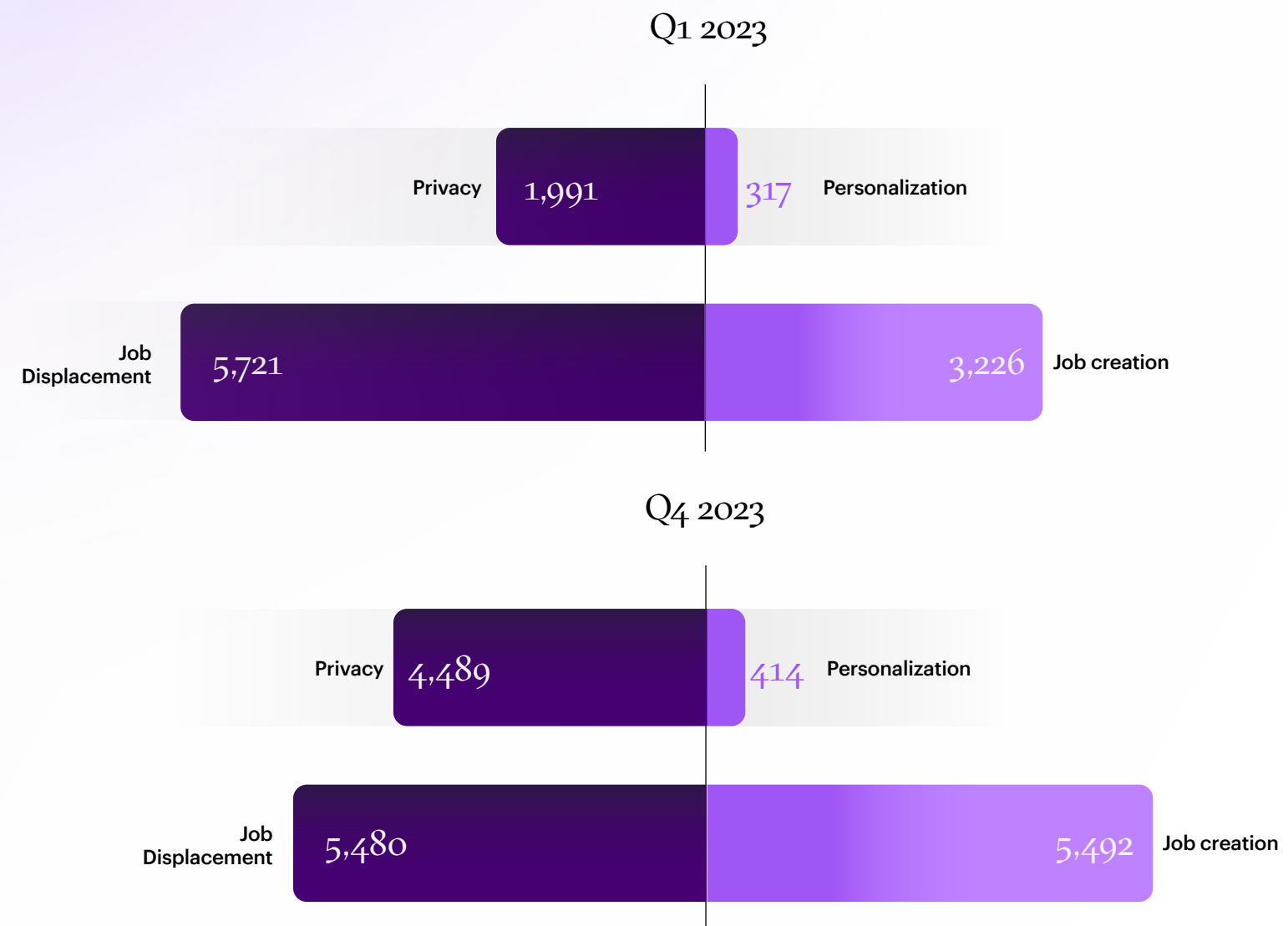
Conflicting views erode trust

Generative AI's natural language interface increasingly democratizes technology access to people across industries and roles. Yet transparency and trust are required for people to effectively adopt and embrace these tools. Our research indicates that this includes—but extends beyond—the need for trust in the tool itself: People also need to **trust that the organization will integrate gen AI in ways that protect and prepare workers.**

Messages in the media reflect where concerns lie. Following the launch of ChatGPT, the potential for job displacement dominated media attention; today, gen AI's potential for violating data privacy is being discussed more frequently (see Figure 3).²⁹

Figure 3. Media coverage focused primarily on job displacement immediately following the launch of ChatGPT, but now focuses more on privacy concerns and job creation opportunities

Total mentions of gen AI topics

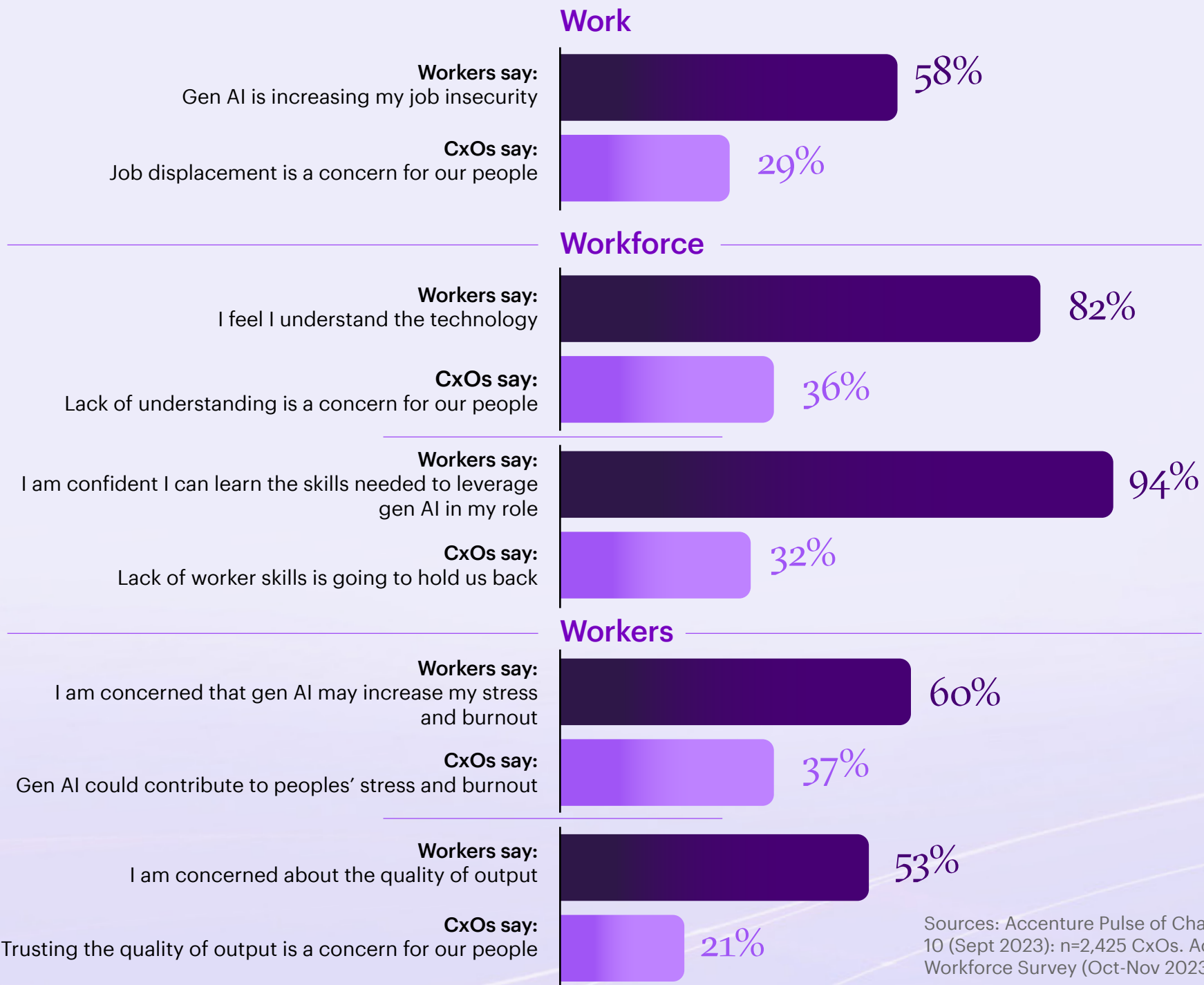


Source: Accenture Research NLP analysis on news articles (Dow Jones Factiva) across 329,314 articles; Jan 2022 – Dec 2023

Figure 4. Misaligned perceptions between workers and CxOs on key concerns related to gen AI’s impact on work, the workforce and workers

But importantly, our research reveals the specific trust gap between workers and leaders (see Figure 4). To a greater extent than CxOs realize, workers are asking whether their organization’s gen AI implementation will cost them their jobs and whether those approaches will lead to stress, burnout and overload rather than to a better employee experience. And they wonder whether the tool itself will deliver quality outputs.³⁰

Our surveys also reveal that 32% of leaders see talent scarcity, due to skill gaps or unawareness, as a major barrier in utilizing gen AI. Additionally, 36% believe workers will not fully embrace gen AI due to a lack of technological understanding.³¹ Yet most workers (82%) believe they grasp the technology, and 94% are confident they can develop the needed skills.³²



Sources: Accenture Pulse of Change survey, Wave 10 (Sept 2023): n=2,425 CxOs. Accenture Change Workforce Survey (Oct-Nov 2023): n=5,000 employees.

Further, while generative AI offers great potential to increase efficiency and reduce human errors, there's an inherent risk of over-reliance on this technology at the expense of finding the right blend of human intelligence and AI capability.

Understanding and closing the trust gaps—not merely observing them—is crucial for business and societal leaders working to deploy gen AI responsibly. By proactively resolving these challenges, we don't just acknowledge them; we turn them into opportunities to get ahead in the Generative Era.

“I think gen AI's greatest power is that it will help us be more creative and advance our productivity as human beings. However, there does need to be some line there. We can't have it set up to where it's doing everything for us.”

Purchasing & logistics manager, US consumer goods & services company



The trifacta of opportunities

Work, workforce, workers: Reinvented in the age of generative AI

The trifecta of opportunities: economy, business, people

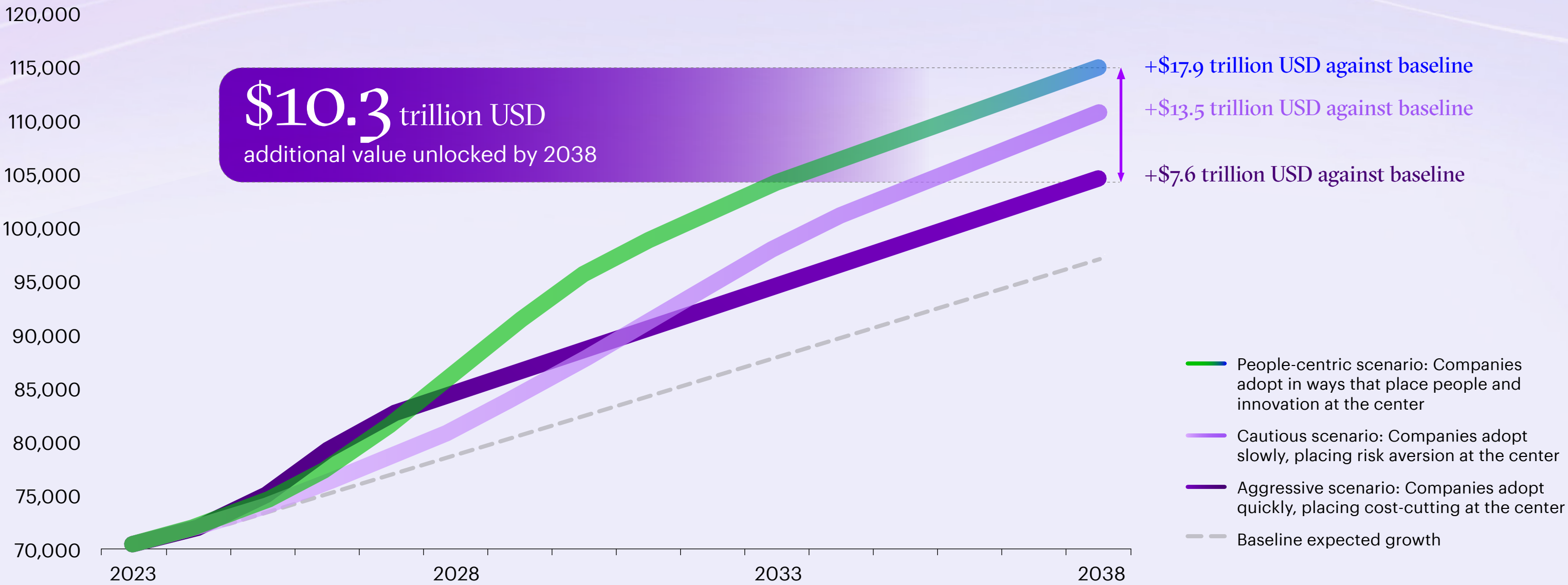
Even with a year's hindsight on generative AI's role in our everyday lives, harnessing the trifecta of opportunities to accelerate economic value, drive business growth and create more meaningful work for people is an ongoing effort. For each opportunity, the incentive only grows when people are the navigators along the path to achieving gen AI's full potential. While previous transformations focused mainly on workforce productivity, this age of gen AI will revolutionize work and workflows across the entire value chain. Our research is bringing into clearer view the big upside of integrating gen AI responsibly.

Economic upside

Our modeling reveals insights from three economic growth scenarios, each based on the pace of gen AI adoption and innovation. Among them, the “people-centric” scenario—where organizations adopt gen AI responsibly at scale, in ways that place people and innovation at the heart—stands out, potentially creating an additional **\$10.3 trillion in economic value by 2038** (see Figure 5 on next page).³³



Figure 5. Companies can unlock an additional \$10.3 trillion in economic value by adopting responsible, people-centric approaches to gen AI



Source: Accenture Research. Simulated GDP growth under three scenarios. GDP forecasts from Oxford Economics across 22 countries.

Business upside

Most CxOs believe gen AI will ultimately **increase their company's market share**, with 17% of them predicting that gen AI will increase their market share by 10% or more.³⁴ This confidence stems from gen AI's ability to help companies free up capacity and improve how they identify, reach, connect with and deliver to customers. Fittingly, more CxOs view gen AI as a tool for revenue growth rather than for reducing headcount.³⁵ In fact, our modeling suggests that companies planning to reinvent work—by integrating gen AI more deeply across functions and business processes at scale—expect to overtake the **revenue growth** of even today's leading companies in the next five years.³⁶

Technology like gen AI is recognized by executives not just as a revenue driver, but also as a force of disruptive change. Importantly, so is talent. Our previous research has shown that technology alone will not drive gen AI-enabled growth; instead, prioritizing people alongside data and tech can lead to **productivity gains** of up to 11%, while sidelining the human factor slashes that gain to just 4%.³⁷

Moreover, Reinventors (the 9% of organizations that lead in reinvention) are 2x more likely to anticipate a productivity gain of 20% or more in the next three years.³⁸ By intentionally involving their people in the change, such organizations are not only working to close the trust and transparency gap, they're also increasing their chances to **reinvent at speed and scale** by 1.7x and 1.6x, respectively.³⁹

“At Mizuho, we’re focused on the future and thinking more broadly about how our industry can transform by having gen AI in the market and within our workforce. Managing this change effectively is extremely important—especially communicating with employees. People are wondering about the impacts and leaders need to take a highly personalized approach. Talk with each individual about their experiences, skills and potential expanded opportunities.”

Makoto Umemiya, Deputy President & Senior Executive Officer and Group Chief Digital Officer, Mizuho Financial Group

"Our goal is to really make AI helpful for everyone by improving knowledge, learning, creativity and productivity, and enabling others to grow through building and deploying AI responsibly. In the workplace, that means making the most of opportunities to use AI to help people and teams work more effectively and increase their impact. One thing that won't change is that work is still centered around humans, so that people can bring their creativity, which is such an important human trait."

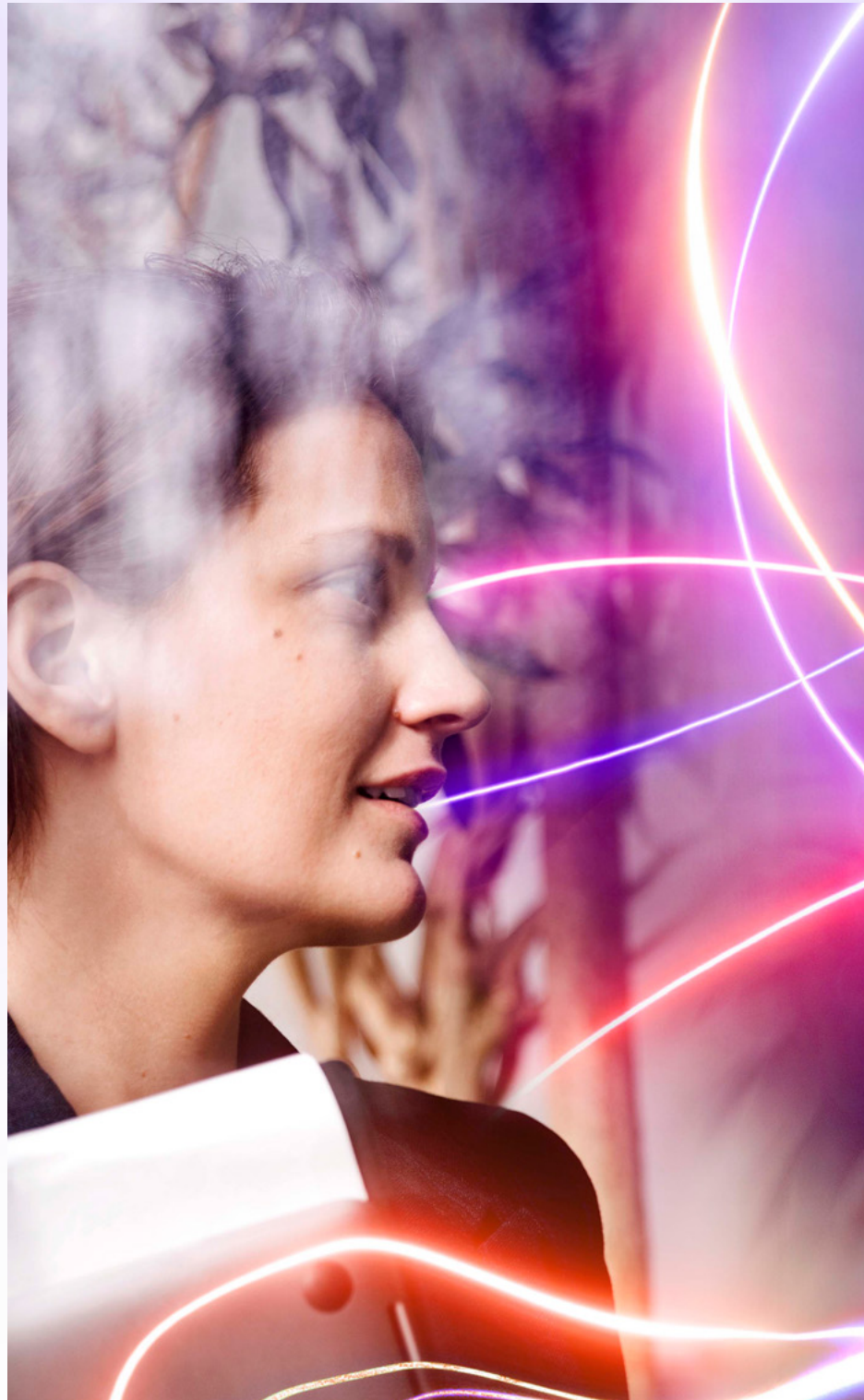
Fiona Cicconi, Chief People Officer, Google

People upside

Working with technology that is “[human by design](#)”—like gen AI-powered agents and innovative digital spaces—enables people to enhance their productivity, creativity and human potential. Moreover, among the Reinventors, two-thirds strongly agree that, with gen AI, **work will become more meaningful, creative and impactful.**⁴⁰

Ultimately, gen AI presents a new, higher-stakes scenario to reshape the workforce and prepare individuals to transition from being focused on one or two areas of expertise (with supporting skills), to mastering multiple interconnected capabilities at once.

Such a shift presents an opportunity to create a more agile and adaptive organization through, for example, tailored learning pathways aligned to each worker’s needs and aspirations. But this will only be achieved if there is a culture of transparency and trust—and executives have a significant role to play in exemplifying these values.



Accenture’s research has shown that helping people to become “Net Better Off” unlocks nearly two-thirds (64%) of a person’s potential at work. We showed that when firing on all four dimensions, organizations can unlock the potential of their people and ultimately deliver 5% greater revenue growth.⁴¹ And our latest research shows that **leaving people Net Better Off is a clear pathway to closing the trust gap and getting people ready for, and comfortable with, generative AI.** For instance, workers who are highly Net Better Off had a 19 percentage point greater incidence of “strongly agree” responses regarding their comfort with the technology—particularly in terms of how they can apply it to their work (see Figure 6 on the next page).⁴²

If your people are Net Better Off

- 01 They're **healthy and well**—physically, emotionally and financially
- 02 They're **connected, with a strong sense of trust and belonging**
- 03 Their work has **purpose**
- 04 They have **marketable skills** that lead to vibrant careers

Figure 6. Workers already experiencing a greater degree of support from their organizations are better prepared to envision and realize the value of gen AI

	High Net Better Off workers that strongly agree	The Net Better Off difference	Low Net Better Off workers that strongly agree
I am highly confident I understand how I can apply generative AI tools in my work.	51%	+19pp	32%
I am very optimistic about how generative AI will impact my future career prospects.	51%	+13pp	38%
I am highly confident I will attain the skilling needed to leverage generative AI effectively in my work.	50%	+12pp	38%

Source: Accenture Change Workforce Survey (Oct-Nov 2023): n=5,000 employees. "Strongly agree" responses compared across workers in the top and bottom quartiles of Net Better Off scores.

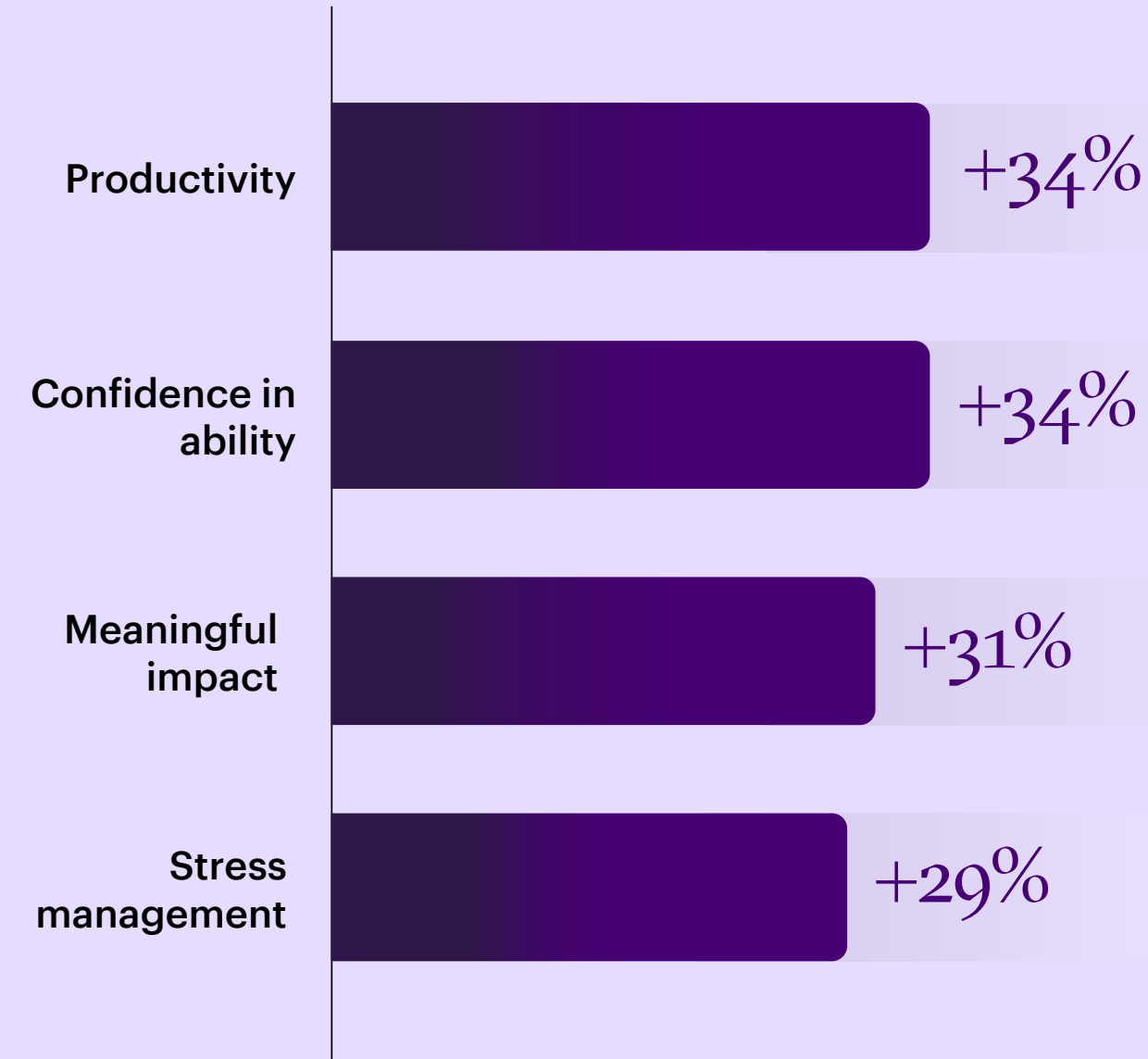


Work, workforce, workers: Reinvented in the age of generative AI

**From readiness to realization:
Learnings from Accenture experiments**

To better understand how gen AI can create enriching experiences and unlock people’s potential at work, we plugged into Accenture teams within the Sales function that are starting to infuse gen AI tools into everyday ways of working.⁴³ Team members were first actively engaged in rethinking their processes and workflows (since they know the work best), and then they helped design and implement the tools. By utilizing gen AI to draft and update proposals, these sales professionals saw marked increases in areas such as productivity, confidence, ability to create real impact through their work and enhanced ability to manage stress at work (see Figure 7). These effects were especially pronounced for people who had been in their role longer—suggesting that experienced workers are ready for, not resistant to, tools that help simplify and improve their work.

Figure 7. Change in sales' professionals reported productivity, confidence, impact and stress management as a result of integrating gen AI tools



Source: n=53 sales professionals testing gen AI tools, who responded to both baseline and post-test survey measures. Values show average % change in each productivity and work experience lever, as a result of gen AI. Response options ranged from -100% to 100%.

Charting the path

Gen AI GPS: Charting the path to realize gen AI's full potential

The opportunity is clear. So, too, is the fact that organizations and leaders need a proverbial “Gen AI GPS” that not only lays out both the journey and the destination, but that is also adaptable for an ever-changing landscape.



With only a small percentage of organizations leading when it comes to reinvention and gen AI, there's substantial opportunity to be among the front-runners. Our research and interviews have identified key accelerators and actions to realize gen AI's full potential through **reinventing work, reshaping the workforce and preparing workers for the future.**

But success in this age of gen AI relies heavily on leaders who are willing to learn continuously and deeply (particularly when it comes to the technology), who lead with compassion and humility and who create the conditions so that their people feel Net Better Off at work. That's why our Gen AI GPS starts with us, the leaders. Think of it this way: Enzo Ferrari didn't build incredible cars thanks to reimagined approaches to design and engineering; he was successful because he was a *driver*. So, for leaders to be effective in the Generative Era—a time when being tech-enabled and people-powered has never been more important—they too need to drive.

“This is about not just being another tool that we start to layer over whatever it is we're already doing. This is a fundamental change in the way we work. Cultures need to shift to create environments where people and their leaders can keep adapting work, learning and changing—at a pace we aren't used to.”

Kerry Dryburgh, Chief People Officer, bp

Accelerator 1:

Lead and learn in new ways

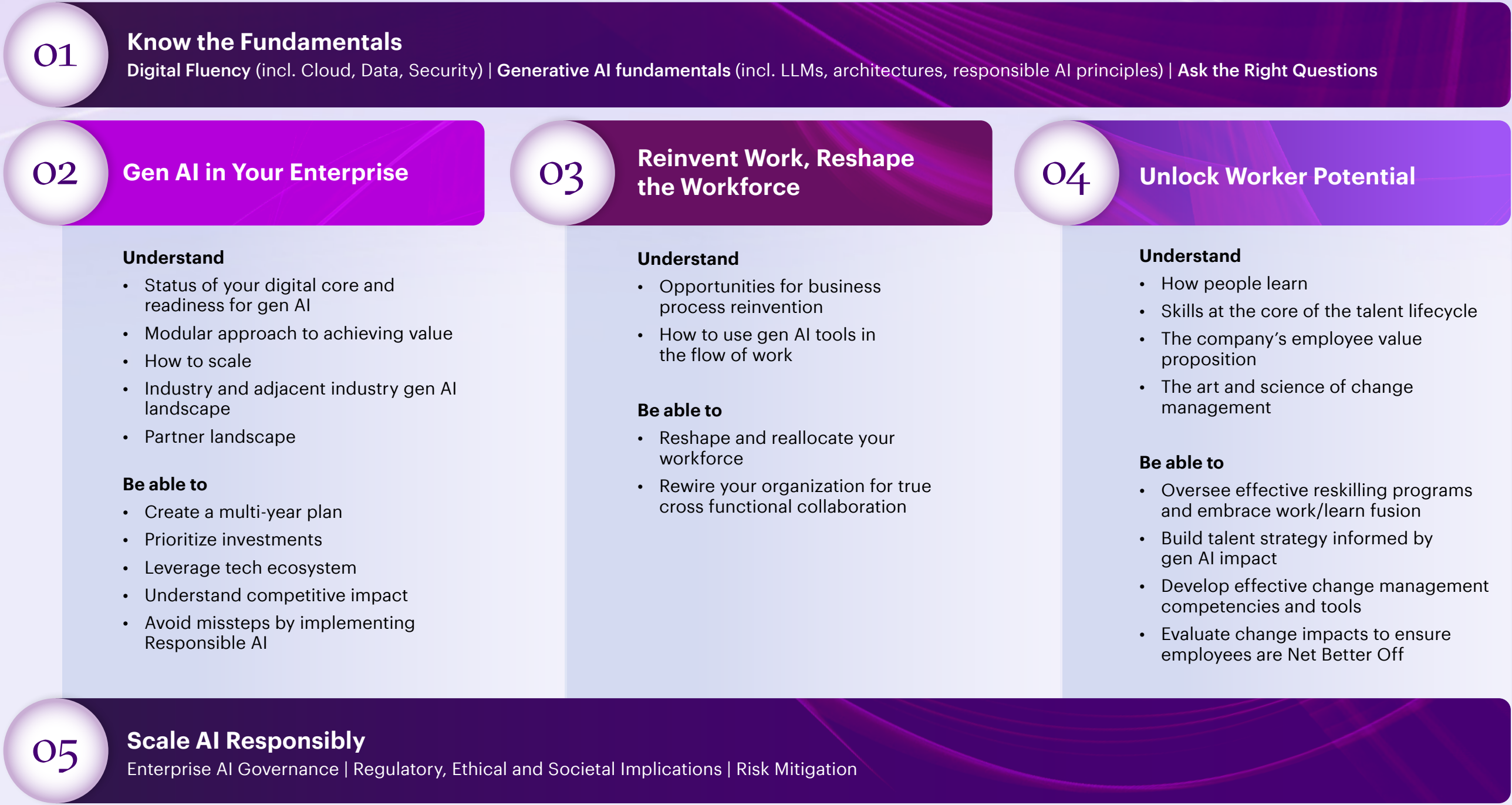


The license to guide an organization through the gen AI journey must be earned—especially given the trust gap identified in our research. To be effective and build trust, leaders need to show up and lead differently, including by challenging old mindsets in order to learn new things (see Figure 8 on the next page). These capabilities aren’t entirely new, but leaders need to approach them in new ways to guide their organizations with both confidence and humility into the gen AI-enabled future. It’s a future where capabilities like digital fluency, enterprise-wide governance, cross-function collaboration, ecosystem partnership, human-centered change management and people leadership all take on greater urgency. Systems thinking—to understand and shape industry, regulatory and societal impacts—is also paramount.

“Leaders are learning just like everybody else is learning. It’s easy to underestimate the foundation needed to really make gen AI successful. It’s so much more than layering this on top and thinking, ‘If you build it, they will come.’ From a technology standpoint and a change standpoint, being people-led and tech-powered comes with a learning curve for leaders to make sure the outputs are really what you want. To get buy-in from your full workforce, we need to see leaders leading the way and engaging with these new tools more than anyone.”

Donna Morris, Chief People Officer, Walmart

Figure 8. A learning roadmap for leaders in a gen AI-enabled world



Source: Accenture 2024

In a gen AI-enabled future,
learning must be accelerated and scaled in the flow of work

Training
relevant to work

+

Learning
through work

=

Work/
Learn
Fusion

Over 65% of executives we surveyed admit they lack the technological expertise required for gen AI-led transformation.⁴⁴ It's therefore important that leaders immerse themselves in the technology, effectively changing how they learn by embedding learning into the flow of work.

Think of it as a continuum. As leaders learn, they'll be able to scale gen AI more effectively and lead responsibly as they reinvent work and reshape the workforce. This, in turn, helps to earn the trust of workers as they are prepared for a future in which they—and the business—will be better off.

Lessons from Leaders:

“We believe AI is more than just a tool; it’s a powerful catalyst for enhancing the guest and associate experiences. At Marriott International, we’ve intentionally had a holistic, cross-disciplined approach. This isn’t a single department’s initiative; it’s a team effort championed by our Chief Revenue Officer, Chief Customer Officer and myself—and fueled by the collective energy of everyone at the company.”

Ty Breland, Chief Human Resources Officer, Marriott International

“It starts at the top, from the board and the CEO and the management team—making sure that we’re setting the tone responsibly and collaboratively. You really must think about what that technology is, who is most likely to use it and get comfortable with it and what can we learn from it? Then, having the channels to bubble up the ideas, connect across our teams and mitigate those risks, as well as prioritize resources. Then, rinse and repeat.”

Sheri Bronstein, Chief Human Resources Officer, Bank of America

“Generative AI technologies hold the potential to help us to do more than ever, do everything faster than ever and create bigger, better results. Their success, however, depends on leaders who make responsible decisions about how, when and where to apply them. Leaders need to be continuous learners; they need to carefully consider and mitigate ethical and social risks and avoid the possibility of disparate impacts; and they must craft an inspiring vision that helps colleagues connect what matters to the company to what matters to them personally. These aren’t one-time activities either. In a world where technology matters more than ever, humanity in leadership also matters more than ever, every single day.”

Eric Pliner, Managing Director, Global Lead for Leadership & Culture, Accenture

Accelerator 2:

Reinvent work

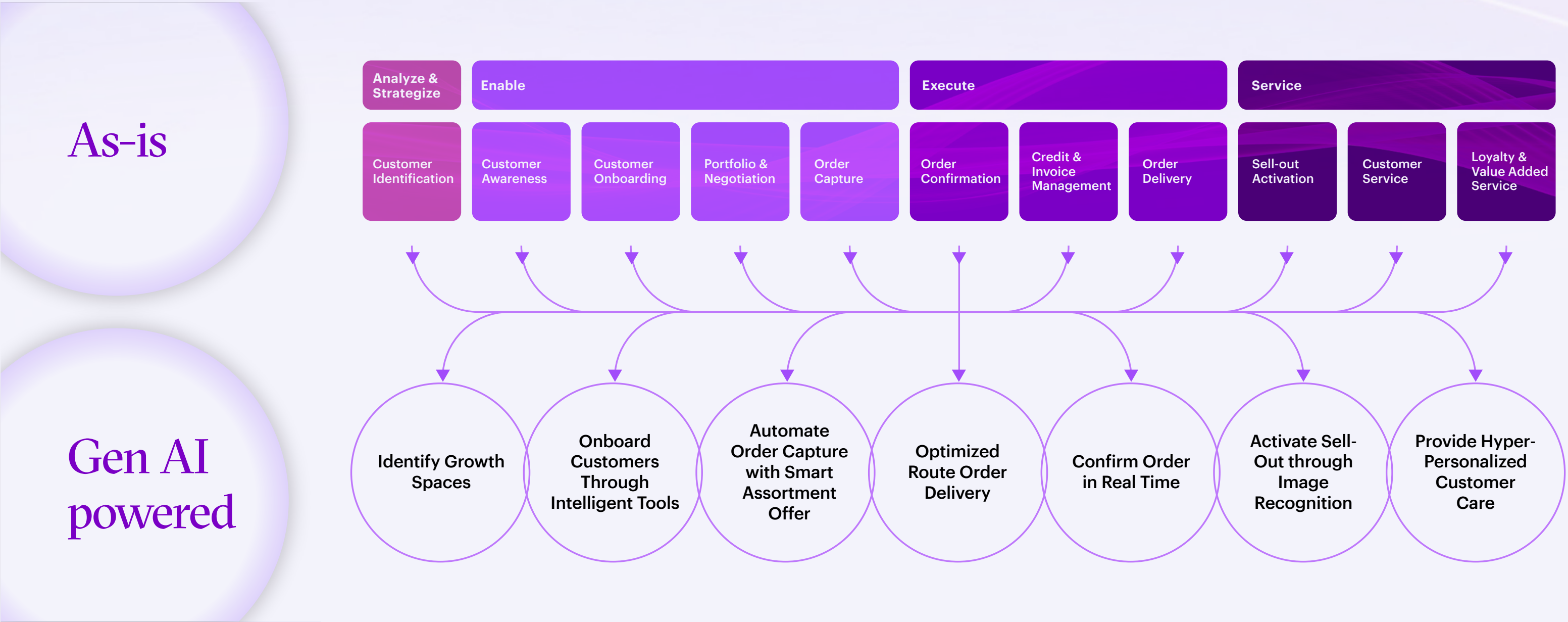
These are early days. However, we've already found that nearly half of Reinventors—the 9% of organizations that are leaders in reinvention—recognize that processes across the value chain will require significant changes in order to realize the trifecta of opportunities from gen AI.⁴⁵ Rethinking entire workflows provides a clear view of where

gen AI can be most impactful. This includes aligning the technology with business goals for greater efficiency and innovation across the enterprise, as well as collapsing silos in a lasting, meaningful way (see Figure 9 on the next page).

Once you have a good view of process-level opportunities, it's possible to reallocate work and focus on what needs to change to better serve customers, support your people and achieve improved business outcomes. Reinventors understand this, with just over half already redesigning work around gen AI.⁴⁶ Another important focus is creating a culture where people move beyond executing to shaping their own work and how it flows through the organization.



Figure 9. Illustrative example of a consumer goods workflow, reinvented using gen AI



Source: Accenture 2024

Lessons from Leaders:

As biotechnology firm **Moderna** looks to turn its ambition of launching 15 new products in five years into reality, the company is focused on its operating model, processes and how work gets done. One example: People are now able to self-start processes and eliminate hours of work using mChat, Moderna’s gen AI solution, to create code—even if they’ve never coded before. Implementations like this help people expand their capabilities well beyond traditional job roles, while also ensuring that people’s great ideas can gain momentum—rather than getting stalled in the system. To take things further, Moderna is providing opportunities for upskilling via an AI academy. The company is making clear that gen AI is now an established part of key workflows across the organization. By expanding people’s capabilities, Moderna is advancing its mission to help as many patients as possible with life-saving and life-changing medications.

Radisson Hotel Group, which has more than 1,100 properties, receives 1,000 or more customer reviews every day. It’s impossible to track every one (though, previously, hotel employees read and responded manually to as many as they could), so Radisson sought Accenture’s help in leveraging gen AI to transform its business processes related to that valuable feedback. Together, we implemented gen AI to draft responses at scale so guests would feel heard and employees and hotel managers could focus more on providing better service. Employees still oversee the response process, which helps the system learn and improve upon each interaction. But it also provides Radisson employees with analytics to understand customer needs more fully, so they can improve guest experiences even more.



Work, workforce, workers: Reinvented in the age of generative AI

Accelerator 3:

Reshape the workforce



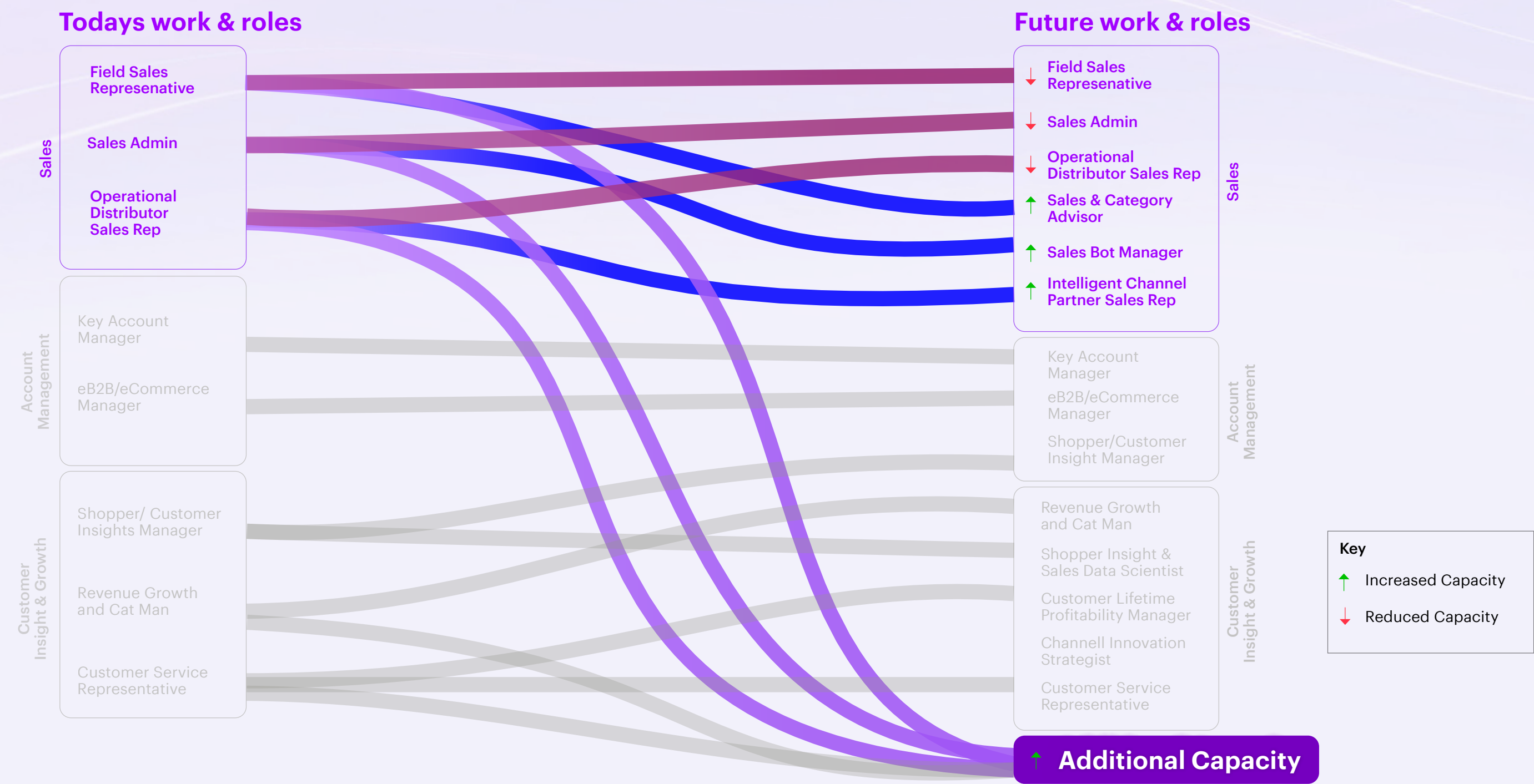
As processes and work change rapidly with generative AI, your workforce—humans, machines and partners—will need to be equally dynamic. Companies looking to emulate the shift in how work gets done must understand that continuous talent reinvention is just that—continuous.

As work and roles shift, capacity is increased, which frees up time and talent for transitions and/or new role creation that best aligns with strategic customer and business outcomes (see Figure 10 on the next page). This increased capacity is the unlock for the productivity and market share gains that CxOs predict will stem from gen AI. And for people making these pivots, there is opportunity to move beyond the traditional “T-shaped” model of deep

knowledge in one area and narrow knowledge in others to, instead, multiple competencies, which can increase their market relevance.

All of this suggests that skills and adaptability—of both people and machines—must keep pace with changes across the value chain. The key is to have talent models, programs, policies and practices that are as agile as your workforce. As use of gen AI grows, organizations should further leverage the capabilities of the skills tech ecosystem to facilitate smoother transitions. Organizations that are skills-driven—with robust skills infrastructure and tools, as well as integrated data across the enterprise—are agile and armed with the predictive insights on skills needed to reshape their workforce, today and tomorrow.

Figure 10. Illustrative example of how work and roles can be reallocated in a gen AI future, freeing additional capacity



Source: Accenture 2024

Lessons from Leaders:

Vodafone's culture has long been guided by the belief that what is good for people is good for business. That's why the telecom giant has started experimenting with and scaling gen AI, with an eye on how work will change for its people. For example, for its frontline agents, Vodafone has been identifying adjacent skills and pathways, offering upskilling opportunities to take on new and expanded roles in areas such as technical support or digital marketing. This deep commitment to its people opens new doors for individuals, while ensuring that Vodafone retains the valuable legacy knowledge and deep understanding of its customers.

“Our employees on this journey with us are helping us shape this whole new way of work. We are very determined to partner with them on what this looks like because I think it has the potential to really improve their experience and quality of work.”

Leanne Wood, Chief Human Resources Officer, Vodafone

Accelerator 4: Prepare workers



“I see generative AI being your toolbox to do all the work that you’re doing today, but faster and better. As someone who works in the creative field, I do all the writing and I don’t think it would completely replace me. But I could use it for developing images or graphics or cool headlines, or helping me develop a project plan based off certain criteria. I’m still the leader of the ship, but the AI is a tool or a buddy or a direct report that I could use to help me get the work done with higher quality and speed.”

Marketing manager, US consumer goods & services company

Economic research suggests that relevant human capital investments, like training, should exceed technology investments by as much as nine-fold.⁴⁷ As organizations integrate generative AI, comprehensive learning initiatives will be vital to ensure their people have market-relevant skills and the capability to collaborate with machines. Yet it’s not just about technology skills. Leading companies are nearly twice as likely to be prioritizing soft skills, too.⁴⁸

What’s also needed is a strong teach-to-learn culture that presents learning in a three-dimensional way: individual, organizational and the machine itself. After all, humans

need to teach the machines (itself a new skill); both people and machines need to get better at their jobs over time to maximize the benefits of gen AI.

Approaching learning like this goes a long way toward involving people at every step, so that change is happening *with* them, not *to* them. And when individuals are actively listened to and invited to explore how their work and work processes could be transformed for the better, organizations foster agency, transparency and trust. The result will be more engaged, productive people who trust the organization and feel Net Better Off.

Lessons from Leaders:

As **Cisco** works to leverage the power of gen AI, the company is committing to a culture of transparency. As new use cases are identified, leadership is working directly with people to work through issues such as determining guardrails and ensuring the technology is used in a positive way when identifying new opportunities. Extra effort is going toward helping Cisco's people be the driving force of change, enabled by the technology—not the other way around.

“What we’re learning together with our employees is that we really need to have this culture of transparency. As a company we are prioritizing sharing with our employees the use cases we are identifying and how we plan to leverage this technology in a positive way. Leaders are going to be at the heart of how we communicate the wins or the challenges; we’re going to be at the heart of ensuring people feel confident to raise their hand.”

Francine Katsoudas, Executive Vice President and Chief People,
Policy & Purpose Officer, Cisco



Prospects ahead with gen AI

The best outcomes are ours to shape

In the mere weeks between the time when the first draft of this report was written—not by generative AI, it should be noted—and its publication, countless new developments with the technology have emerged. In contrast, other groundbreaking innovations—from the printing press to the internet—didn’t proliferate anywhere nearly as fast.

No recent—and perhaps no other—technological innovation has transformed so much, including itself, so quickly. Indeed, gen AI took a few hours at most to capture the world’s attention. Gen AI’s swift adoption by enterprises and individuals alike underscores its ability to reinvent work, reshape the workforce and prepare people for a future that unfolds in real time.

That’s why time is of the essence. Our shared prospects hinge on evaluating past actions that may limit gen AI’s full potential, as well as evaluating the steps we take moving forward. And as we navigate the journey ahead, it’s critical to build trust and transparency, thereby ensuring that the full potential of gen AI is felt across the economy, businesses and people. Ultimately, the best outcomes are within our power to shape.

As leaders, we are lucky if we have one opportunity in our careers to identify a genuine catalyst for monumental change. Gen AI is that opportunity. By leading and learning in new ways, we have the power to lift organizations, people and society, while building the organizational resilience needed to navigate what’s next on the horizon.

“My advice: I wouldn’t do anything incremental. Think big in terms of investing in and elevating people’s potential. While I can talk about using a tool or a system from a generic perspective that’s helping us do things faster, I think, with gen AI, it’s much more around the true capability shift within human individuals, and how you weave that through how work gets done.”

Tracey Franklin, Chief Human Resources Officer, Moderna

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Research methods

We modeled three potential scenarios based on different approaches organizations may take to drive adoption of and innovation with gen AI, using economic growth scenarios based on GDP statistics for 22 countries as a baseline.

We started by determining how gen AI will transform and unlock productivity on specific work tasks for jobs across 22 countries* through automation and augmentation impacts (please see the next section for additional details). We then used machine learning to explore likely job transitions, based on shared characteristics of jobs and history of worker transitions between occupations. We also noted which transitions would likely result in a higher versus lower quality job from a people experience perspective, as defined by publicly available sources aligned to our Net Better Off framework. Next, we explored different scenarios** of how organizations may approach gen AI adoption and innovation, differentiating across

three parameters: innovation focus, pace of adoption***, and degree of talent displacement. Finally, we modeled GDP growth (2023-2038) for each of the 22 countries under the three scenarios, allowing us to measure their relative projected economic value and comparing to baseline GDP growth projections sourced from Oxford Economics.

* Countries analyzed: United States, China, Japan, Germany, United Kingdom, India, France, Italy, Brazil, Canada, Australia, Spain, Mexico, Saudi Arabia, Argentina, Sweden, Norway, South Africa, Denmark, Colombia, Chile, Finland.

** The **aggressive scenario** was set up to reflect organizations focused entirely on cutting costs through gen AI, adopting the technology quickly (full adoption within 5 years), and displacing talent at a high rate. Displaced talent would transition to jobs similar to the ones they held (i.e., roles of equal likelihood for displacement),

resulting in increased unemployment. The **cautious scenario** was set up to reflect organizations focused on automating and augmenting work with gen AI, adopting the technology slowly and cautiously to avoid displacing talent (full adoption within the next 15 years), but without a focus on creating people-centric, Net Better Off approaches and organizations. **The people-centric scenario** was set up to reflect organizations focused on augmenting work with gen AI, while also leveraging automation use cases effectively. As they adopt the technology at a moderate pace (fully within 10 years), talent displacement is ultimately low because effort is placed on creating people-centric, Net Better Off approaches and organizations to support both existing workers whose jobs are changing, and new workers displaced due to automation and moving into new roles.

*** Pace of adoption S-curves were derived using logistic functions, assuming 50% of adoption would happen in half the time of full adoption.

We uncovered the percent of total working hours impacted by gen AI by analyzing time spent on language-based tasks across occupations and industries in 22 countries.

Using Occupational Information Network (O*NET), US Dept. of Labor, US Bureau of Labor Statistics and other National Statistical Institutes as sources, we identified work tasks related to language, which were linked to countries and industries by calculating their share in each occupation and the occupations’ employment level. Tasks with higher potential for automation can be transformed by LLMs with reduced involvement from a human worker. Tasks with higher potential for augmentation are those in which LLMs would need more involvement from human workers.

Note: Geographics, occupations and industries with higher proportions of language tasks relative to total time worked will see greater impact. For instance, due to their high proportion of language tasks, highly impacted occupation groups include: information and

communications technology professionals; information and communications technicians; business and administration associate professionals; customer-service clerks; and salespeople. The top impacted industries are Capital Markets, Software & Platforms, Banking, Insurance and Communications/Media.

We determined gen AI’s impact on different groups of people by tracking demographic trends across key occupations with different projected levels of gen AI automation and augmentation.

Data from the US Bureau of Labor Statistics, from both the Employment Projections program and the Current Population Survey, as well as Global [ISCO 1](#) level groupings, were leveraged to conduct a nuanced analysis of automation and augmentation affects on jobs, segmenting by requirements in skill level, education and experience.

We followed media sentiment over time to better understand how the discussion around this topic is changing.

We analyzed over 300,000 media articles across global sources dating back to January 2022 to capture changes in media volume and attention surrounding talent and gen AI, especially following the release of ChatGPT and the rise of LLMs. We leveraged semantic text analysis, Natural Language Processing and a predefined taxonomy of key topics to identify trends and insights related to each, along with evolving nuances and sentiment surrounding the broader gen AI topic.

We determined the impact of leaving workers Net Better Off on their gen AI sentiment and readiness by comparing survey responses of highly supported workers versus those with less support.

The levels of support experienced by workers across Net Better Off dimensions were captured through Accenture's Change survey (conducted Oct-Nov 2023, with n=5,000 workers) and were aggregated into one "Net Better Off" score. This survey also included a series of questions specific to gen AI adoption, perception and experiences. Responses to these questions were compared among workers in the top quartile and bottom quartile of Net Better Off scores.

We tapped into our own experimental approach to gen AI to understand the impact these tools can have on people.

We conducted brief internal surveys with Accenture sales professionals prior to, during and at the conclusion of a role-relevant, gen AI-solution testing period.

We determined CxO and worker perceptions of gen AI using a series of global surveys and in-depth interviews.

As noted, CxO sentiment and perceptions were captured through Accenture's Pulse of Change survey, Waves 10 and 11, and Accenture's Total Enterprise Reinvention survey (conducted Sept-Nov 2023, with n=2,425, n=3,450, and n=1,500 CxOs, respectively). In-depth interviews were additionally conducted with n=27 CxOs.

Worker sentiment and perceptions were captured through Accenture's Change survey (conducted Oct-Nov 2023, with n=5,000 workers). Brief interviews were additionally conducted with n=50 workers.

These survey and interview efforts tapped leaders and workers of large organizations (>\$1 billion in annual revenue) headquartered in the following countries: Australia, Brazil, Canada, China, France, Germany, India, Ireland, Italy, Japan, Mexico, Netherlands, Singapore, South Africa, Spain, Sweden, Switzerland, United Kingdom and United States. Organizations in the following industries were represented: Aerospace & Defense, Airline, Travel & Transport, Automotive, Banking, Capital Markets, Chemicals, Communications & Media, Consumer Goods & Services, Energy, Financial Services, Food Distribution, Health, High Tech, Hospitality, Industrial Goods & Equipment, Insurance, Life Sciences, Natural Resources, Public Service, Retail, Software & Platforms and Utilities.

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