THE AILERON GROUP REPORT ON

State of Enterprise GenAI Adoption

3Q2025 EDITION, SEPTEMBER 1, 2025

WHAT WE LEARNED ABOUT WHERE EARLY ADOPTERS ARE FINDING THE MOST BUSINESS VALUE FROM GENAI

Q3 2025

Inaugural issue of our quarterly analysis of enterprise GenAI adoption patterns across industries, based on 765 customer stories published by leading GenAI providers.



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Dear Reader,

GenAI's headlines point in opposite directions. In the same week, you can read that pilots are failing and also that demand is growing exponentially. With data this early and uneven, smart people can prove whatever they already believe. Leaders feel the whiplash.

To give decision makers a steadier view, we read and coded **765 published customer stories** from the five leading providers, using Aileron's **GenAI SuperPowers framework** to break them down.

We know that published stories skew positive. By analyzing them, we can see what's actually being deployed, where it lands in the business, and which enablers and outcomes are most common.

We also **walked the talk**. We used GenAI tools end-to-end, to sift through thousands of stories, summarize, classify, quality check, and produce the charts. How value is created from knowledge is changing, including in our own work.

Treat this as a practical baseline for smarter bets today and a way to measure progress tomorrow. Tell us what you're seeing. We'll fold it into the next edition

Yours sincerely,
Sandeep & Gil

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KEY TAKEAWAYS

WHAT WE LEARNED FROM ANALYZING 765 GENAI CUSTOMER SUCCESS STORIES

How we know what we know
We applied our GenAI Superpowers framework to analyze customer stories from Microsoft, Google, AWS, Anthropic, and OpenAI. Using GenAI tools, we processed thousands of pages to identify patterns that humans might miss.

85% of stories show efficiency gains - often dramatic improvements. Only 21% report any financial impact. Even fewer can prove ROI. Companies are winning but not keeping score.

Adoption today is narrowly focused on back office functions. However, some early movers are proving that front office innovation delivers even bigger monetary wins.

Adoption patterns are fairly consistent across industries and providers - no clear winners yet.

However, our spotlight sector, **Financial Services looks even more conservative** than other industries. Their focus on back office functions is higher at 95% (vs. 76% for the rest).

US companies leverage partners while non-US firms invest in innovation culture. US organizations rely more on ecosystem partners. Non-US companies build more internal capability.

Most organizations can prove that GenAI works but don't document financial returns - so we hunted for the dollars, and those who measure tell a compelling story.

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WE FOUND $1.1BN OF FINANCIAL RESULTS!

One outlier skews the sample. But the other $417M is real and suggests that there's more out there...

164 of 765 customer stories (21%) reported financial benefits, but not all were at a level of granularity that we could add them up. We focused on the 43 well-documented customer stories that represent $159.3M in cost savings and $972.9M in revenue increases.

One tech enterprise reported $715M (!) in revenue growth, and we decided to exclude this as an outlier. **We found $417M across the remaining 42 stories.** Revenue gains averaged ~$21M (12 stories) and cost savings averaged ~$5M (32 stories).

Our data shows both extremes: massive wins are possible, and consistent smaller wins add up. This begs the question: **how many billions are NOT being measured?**

Scarce financial results are feeding the skeptics, but 85.5% of stories show efficiency gains - with only 23% of these documenting the dollars. That's 500+ wins with missing ROI.

Who are the 164 reporting dollars and cents?

- Higher proportion (+4.7%) of sales functions represented
- More are enabled by ecosystem partners (+8.5% vs. those who are not)

The truth is out there!!

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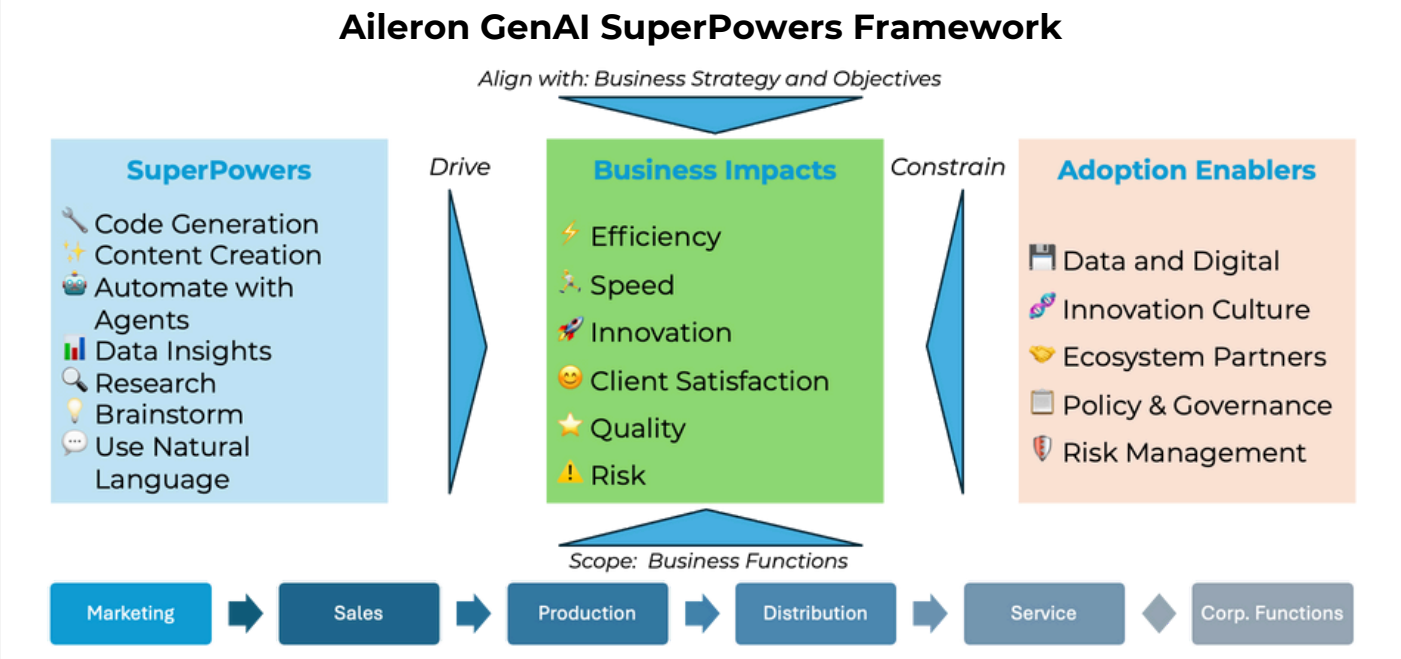
THE GENAI SUPERPOWERS FRAMEWORK

CONNECTING BUSINESS STRATEGY TO AI SUCCESS

We use our proprietary GenAI SuperPowers framework to guide client discussions and identify and prioritize use cases by tying business strategy and objectives to GenAI capabilities.

The 4 major dimensions of the framework helped us analyze and classify each customer story, and parse out the patterns and trends in a structured way.

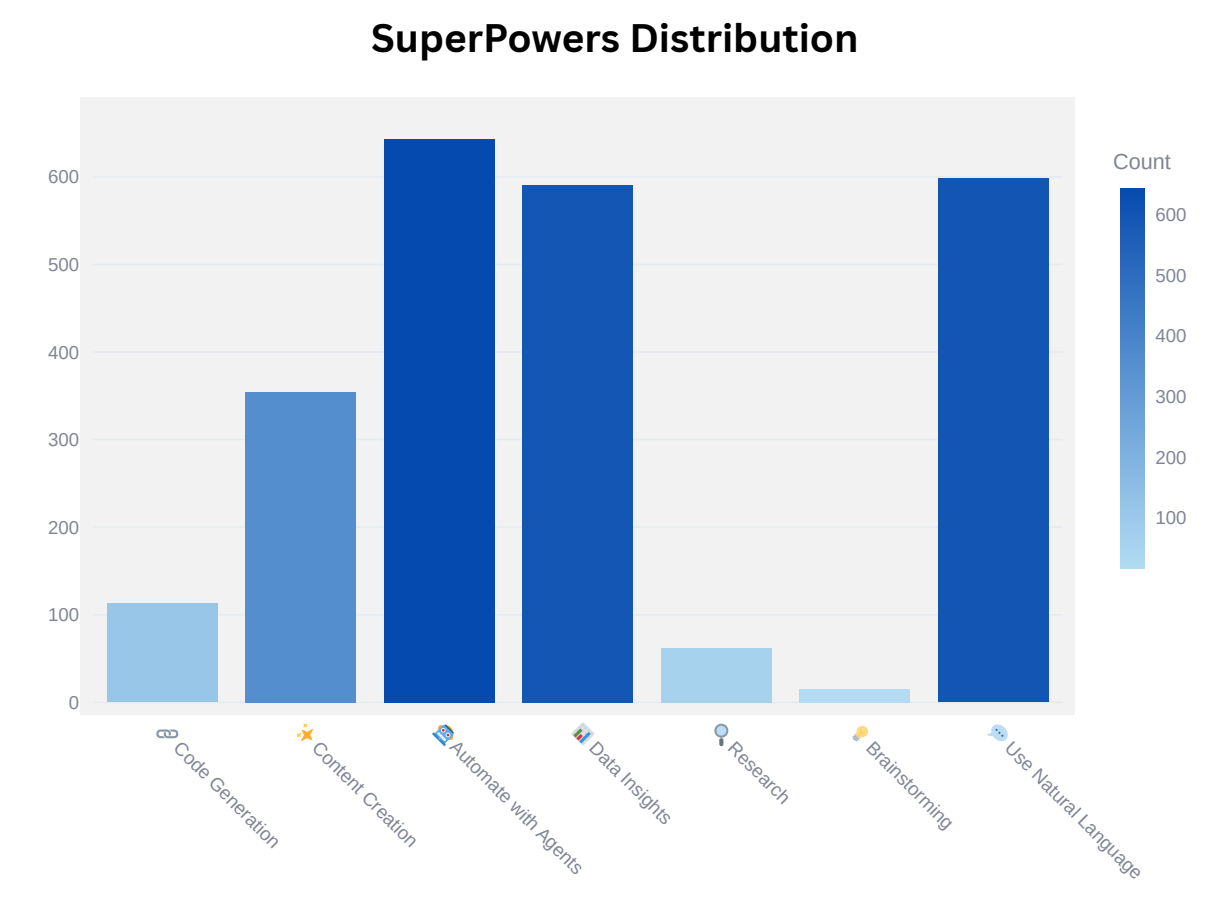
- **Business Functions:** core business processes across the value chain
- **SuperPowers:** distinctive GenAI capabilities that transform how work gets done
- **Adoption Enablers:** organizational and technical foundations required for successful GenAI deployment
- **Business Impacts:** measurable business outcomes



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THREE SUPERPOWERS DOMINATE



GenAI adoption is predominantly focused on Agent Automation (84%), Natural Language capabilities (78%), and Data Insights (77%). Customer stories highlight workflow optimization, not just automation, by adding natural language interfaces and using GenAI to accelerate analysis of data.

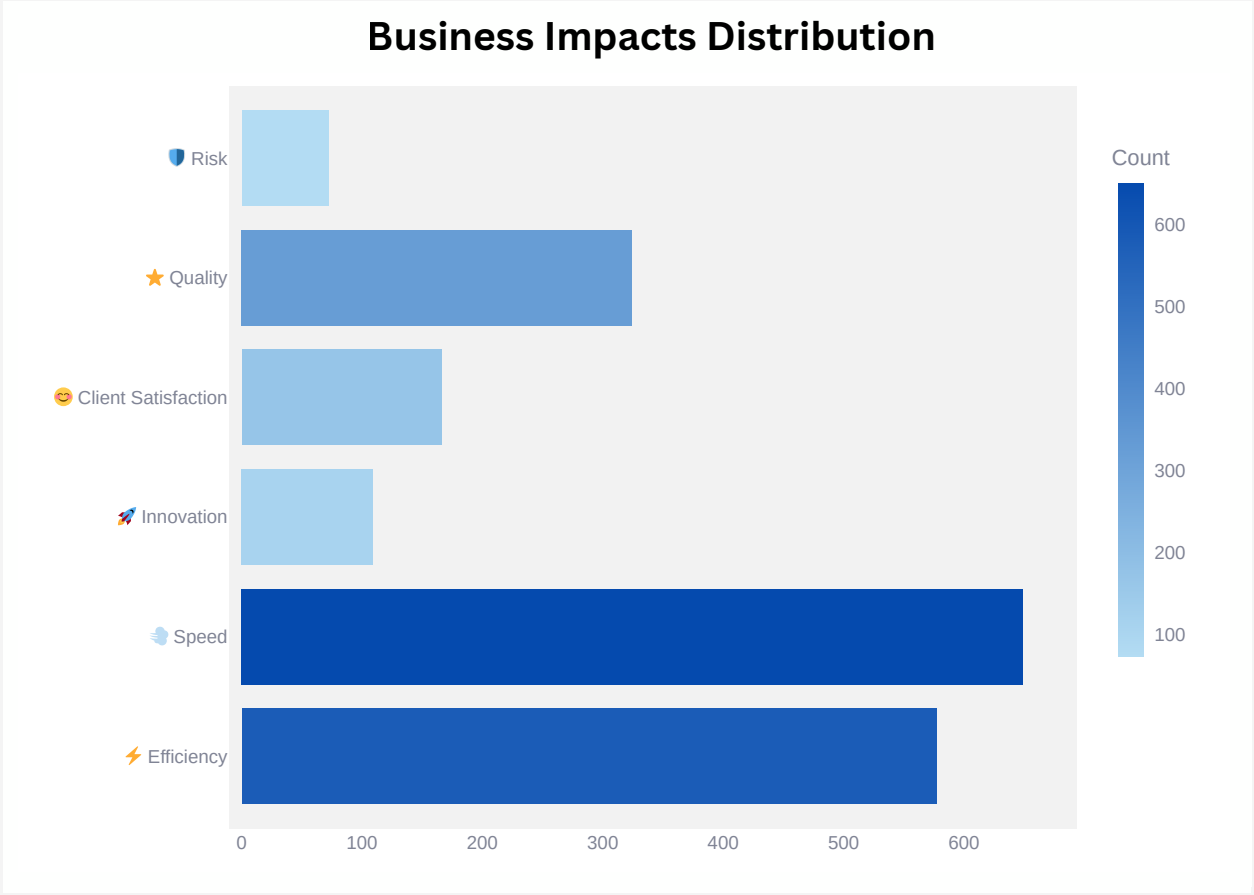
Lower frequency of Code Generation (15%) is surprising given the popularity of AI Coding. We believe this is likely due to underreporting of these stories, because they may be repetitive or embedded in other stories.

Companies are optimizing today's work and not yet inventing tomorrow's: making the present more efficient vs. creating the future.

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SPEED AND EFFICIENCY ARE THE LEADING BUSINESS IMPACTS



Speed (85%) and efficiency (75%) are the business impacts most frequently reported – customers are focused on immediate operational improvements, but not just labor savings!

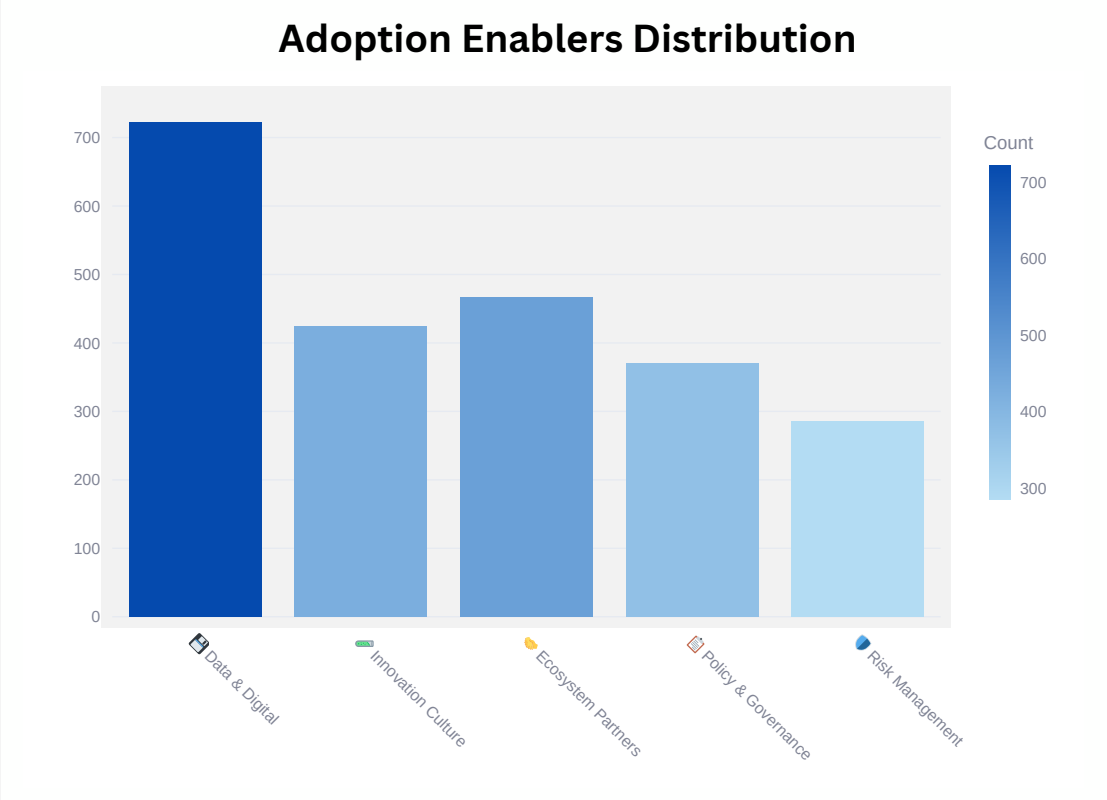
These customer stories provide strong evidence that GenAI is accelerating business outcomes. It's possible that this business impact will be even more transformational when applied to the front office.

The large gap between Efficiency and Innovation reveals the current GenAI playbook is optimize first, innovate later. History suggests the companies that reverse this order often win.

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DATA & DIGITAL ARE KEY ENABLERS



Nearly all customer stories emphasize the need to build robust data and digital foundations (94%) as the key enabler. This supports our view that **GenAI transformation inevitably builds upon and adds urgency to an enterprise's digital transformation journey.** The most compelling opportunities are fueled by data and executed in the digital space.

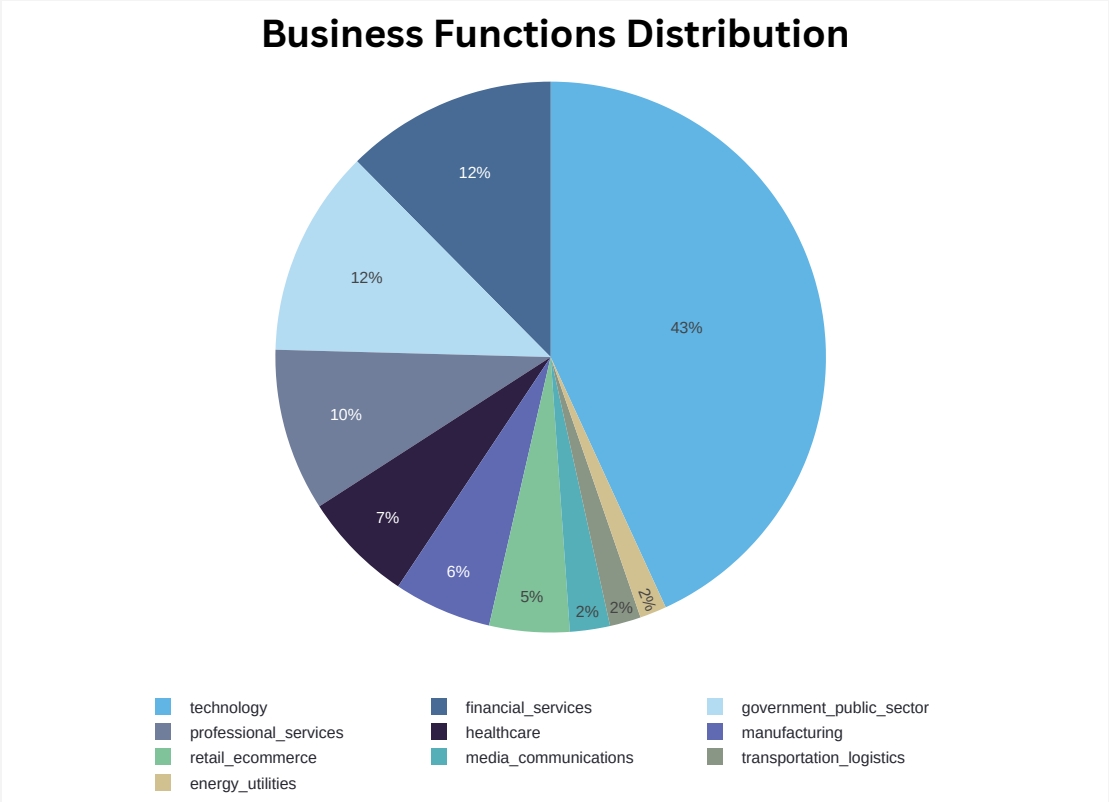
Ecosystem partners are frequently mentioned as an enabler of success, and this may reflect the source of our data (big GenAI labs and hyper-scalars). It also reflects the fact that GenAI transformation is a team sport – almost no one is doing this alone.

We expected more discussion of policy, governance and risk management as enablers, given the intense focus on hallucinations, bias and security risks. Either risk management isn't driving success, or successful companies aren't talking about it.

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STORIES FOCUS ON BACK-OFFICE FUNCTIONS



The majority of successful GenAI implementations reported are in back-office operations i.e., corporate functions (47%) and service (32%). This is consistent with the practical and risk-averse approach we're seeing throughout. Customers start with foundational capabilities and back-office functions.

As organizations gain more experience, we expect more focus on "front office" production and customer-facing processes, particularly among enterprises that have already tasted success.

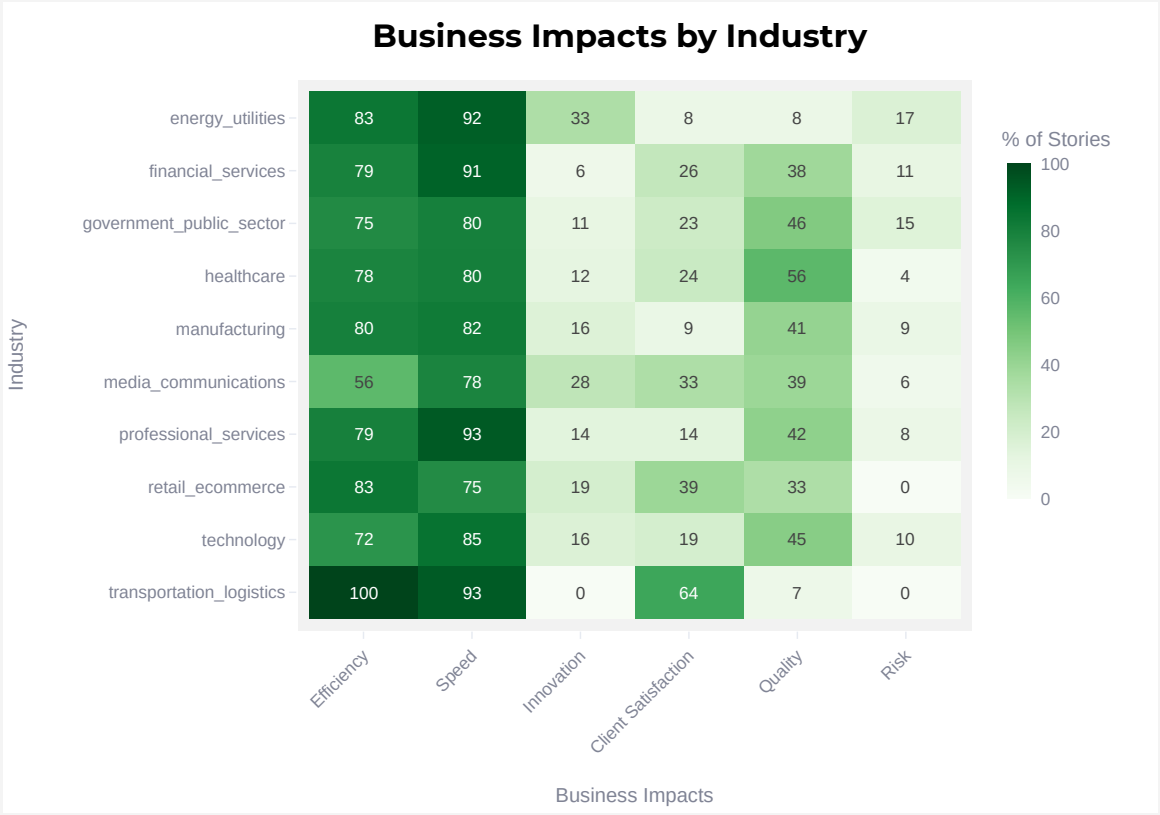
When focus shifts towards front-office, we expect to see a positive feedback loop that widens the gap between early adopters and followers.

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CROSS-INDUSTRY BUSINESS IMPACT

IS THERE AN INNOVATION GAP?



Our analysis of adoption patterns by industry sector generally showed a consistent distribution of stories across the dimensions of our framework. It's still early days and most customers are focused on the same things, in other words - speed and efficiency in back office functions.

On the business impact cross-tab above, Innovation and Client Satisfaction show a wider range of variance across sectors. Energy, Media, Transportation are unexpected leaders.

Will industry sectors where Innovation shows up first be leaders in business impact? Stay tuned...

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LITTLE DIFFERENCE IN GLOBAL ADOPTION PATTERNS



Our sample is fairly evenly split between US and non-US customer stories, with about 55% coming from US customers and 45% from the rest of the world.

We found that on nearly every dimension of our framework, there is little difference between these two samples.

One exception is enablers, where **US customers focus more on Ecosystem Partners and Non-US cite Innovation Culture** more frequently. This implies that they build more internal capability.

We would have expected some evidence of US leadership given that the 5 providers are US-based, but it's not there.

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SPOTLIGHT ON FINANCIAL SERVICES

In this edition, we took a deeper look at how the Financial Services industry is adopting GenAI, in contrast to the other major industries.

Financial Services is generally second only to Technology in terms of IT spending as a percentage of revenue, and it's the second largest cluster in our database. It is often a bellwether for enterprise adoption of new information technologies because of the information-intensity of its business models. FS is also among the most highly regulated and hence, risk averse industries.

We thought it would be interesting to take a deeper dive to see what is different about the customer stories reported by FS industry customers.

The most notable difference we found was that **FS firms are even more focused on deploying GenAI in service and corporate functions**, at 95%, where other industries are at 76%. They also mention policy governance, and risk management slightly more often, and provide fewer examples of innovation.

Overall, Financial Services (including Fintech) is taking a more cautious approach compared to other industries.

Is this an opportunity for disruption? Who is best positioned - a smaller bank or a fintech?

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ILLUSTRATIVE CUSTOMER STORIES

A LITTLE CONTEXT

This body of research was built upon a database of customer stories that were extracted from GenAI provider websites, then summarized and classified using our tools and frameworks.

To help the reader visualize this source material and understand the analysis more tangibly, we will include a sample of the most interesting stories in each edition of the research, which will typically be aligned with the industry or topical spotlight of that report.

In this first edition, we have selected three representative customer stories from Financial Services:

Wells Fargo: branch banking query resolution improves efficiency by 20%
Bradesco: virtual assistant for 1st level customer service cuts response time from days to hours
NuBank: chatbot upgrade with agents is 2.3x faster and more accurate

Overall, the Financial Services stories are focused on delivering efficiency to back office functions and customer service.

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WELLS FARGO (GOOGLE CLOUD)

Industry: Financial Services
Company Size: Enterprise

Summary:
Wells Fargo, managing $1.9 trillion in assets, needed to modernize their banking operations for the generative AI era while maintaining strict security requirements. They implemented Google Cloud's Apigee API Management platform to create standardized, task-specific APIs for AI integration across their operations, including RAG-based tools and Document AI. This resulted in 20% faster query resolution times for branch bankers and enhanced underwriting processes while ensuring robust security governance.
Technologies: Google Cloud Apigee, Retrieval Augmented Generation (RAG), Document AI
Business Outcomes:

- Efficiency Improvement: 20 percent - Reduced workflow for branch banker query resolution time by approximately 20%

Aileron GenAI Framework:

- SuperPowers: automate with agents, find data insights, natural language
- Business Impacts: speed, efficiency, risk reduction
- Adoption Enablers: data and digital, policy and governance, risk management, ecosystem partners
- Business Function: service

URL: Link

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BRADESCO (MICROSOFT)

Industry: Financial Services
Company Size: Enterprise

Summary: Bradesco faced efficiency challenges with their virtual assistant BIA, requiring 3-5 days for processing internal queries and document updates. They implemented Microsoft Azure's generative AI suite, including Azure OpenAI Service and Data Lake, to enhance BIA's capabilities. This resulted in an 82% first-level resolution rate, 89% client retention, and an 8x increase in system usage, while reducing response times from days to hours.
Technologies: Azure OpenAI Service, Microsoft Copilot, Azure AI Services, AI Search, Data Lake Storage, Databricks, Service Fabric
Business Outcomes:

- Efficiency Improvement: 82 percent - First-level service resolution rate
- Customer Satisfaction: 89 percent - Client retention rate
- Productivity Gain: 8x times faster - Growth in BIA usage by managers
- Time Savings - Response time reduced from 3-5 days to few hours

Aileron GenAI Framework:

- SuperPowers: natural language, automate with agents, find data insights
- Business Impacts: speed, quality, client satisfaction
- Adoption Enablers: data and digital, ecosystem partners, policy and governance
- Business Function: service

URL: Link

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NUBANK (OPENAI)

Industry: Financial Services
Company Size: Enterprise

Summary: Nubank, serving 114 million customers across Latin America, faced the challenge of maintaining exceptional customer service while managing massive scale. They implemented multiple OpenAI solutions including GPT-4o powered enterprise search, Call Center Copilot, AI Assistant, and fraud detection system. This resulted in 70% faster chat response times, handling 2M+ monthly conversations with 55% of Tier 1 inquiries resolved automatically, while maintaining high customer satisfaction scores.

Technologies: GPT-4o, GPT-4o mini, OpenAI, RAG

Business Outcomes:

- Efficiency Improvement: 70 percent - Reduced chat response time by 70%
- Automation Rate: 55 percent - AI assistant resolves 55% of Tier 1 inquiries
- Volume Handling: 2 million - Handles over 2 million monthly chats
- Efficiency Improvement: 2.3x times faster - Resolves queries 2.3x faster with higher accuracy

Aileron GenAI Framework:

- SuperPowers: automate with agents, find data insights, natural language
- Business Impacts: speed, efficiency, quality
- Adoption Enablers: data and digital, ecosystem partners, risk management
- Business Function: service

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BEHIND THE RESEARCH

OUR METHODOLOGY

Our Data Sources

- We reviewed over 1,000 published customer stories from the 5 leading GenAI labs and hyper-scalers. Using our custom GenAI tools, we narrowed this down to 765 GenAI stories with enough detail and clarity to analyze. We used Claude by Anthropic for summarization and classification.
- These stories have been published since ChatGPT's release in Fall 2022. Since the stories lack consistent publication dates, trend analysis will come in future releases as our dataset grows.

What We Measured

- We used our tools to summarize the stories and classify them along multiple dimensions, including our proprietary Aileron GenAI SuperPowers framework. This enables us to explore what's really working and why.
- We also used GenAI tools to assess story quality based on consistent criteria. We removed the bottom 30% to ensure reliability.

Additional Context

- Our sample focuses exclusively on successes. Nobody publishes their failures.
- The government and public sector category includes both public and private educational institutions. When we looked at company size, however, some institutions are classified as enterprises based on employee count.

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OUR SAMPLE, BY THE NUMBERS

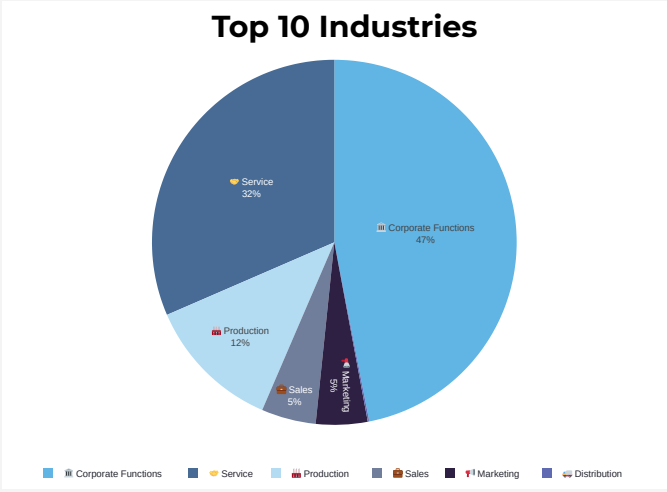
By Industry: 330 of the GenAI customer stories were in technology followed by **95** in financial services and **93** in government and public services. Energy and utilities were the least represented in this sample at **12** customer stories. (Tech is probably oversampled since they are 20-25% of global equity market capitalization).

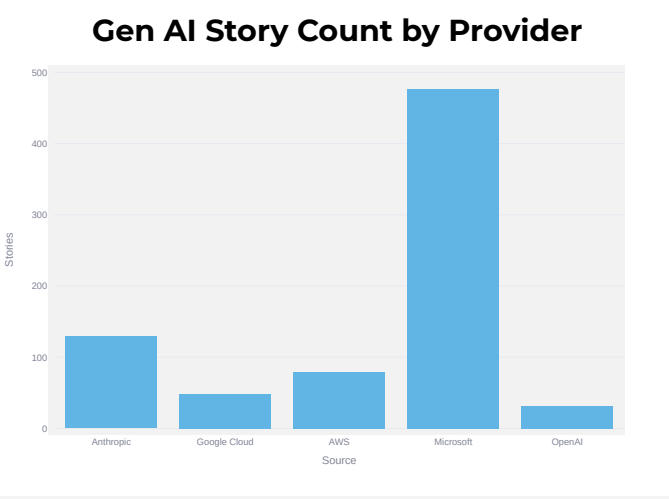
By Provider: Microsoft has published more customer stories (**477)** than all others combined: Anthropic (**129**), Google Cloud (**48**), AWS (**79**), and OpenAI (**32**).

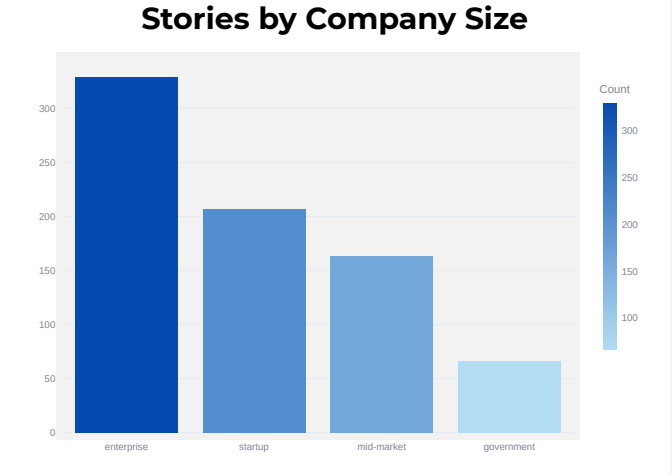
By Company Size: 329 stories are classified as enterprise, followed by startup (**207**), mid-market (**163**) and government (**66**).

A Note on Microsoft:

We were concerned that Microsoft was over-represented in the sample, so we used statistical analysis to test for this. Analysis confirmed that Microsoft's adoption patterns mirror the other providers, ensuring our findings remain representative.







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FINANCIAL SERVICES ANALYSIS: VALIDATION

Financial Services vs Non-Financial Services - Distribution Comparison



To validate our findings were representative and unbiased by sample size variations (95 Financial Services vs. 670 Non-Financial Services), we performed statistical analysis (Chi-Square, Cramér's V, JS Distance).

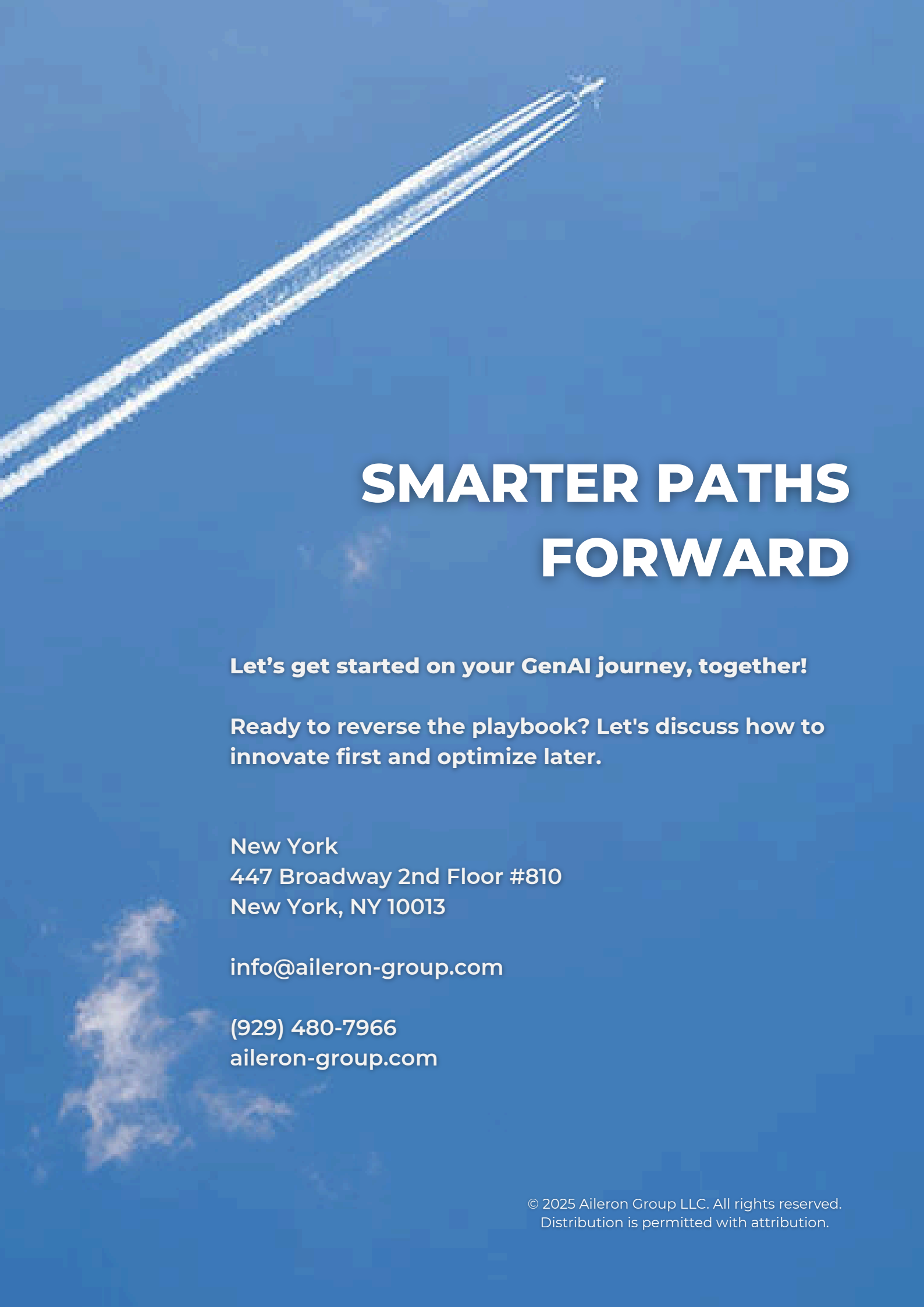
The tests reveals similar adoption patterns across:

- GenAI SuperPowers
- Business Impacts
- Adoption Enablers

These three demonstrate weak association (Cramér's V < 0.07).

The only notable distinction appears in Business Functions, where GenAI application differs (Cramér's V = 0.165, JS Distance = 0.259) indicating meaningful differences.

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SMARTER PATHS FORWARD

Let’s get started on your GenAI journey, together!

Ready to reverse the playbook? Let's discuss how to innovate first and optimize later.

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