



# AI-driven services

Reimagining value in the age of automation

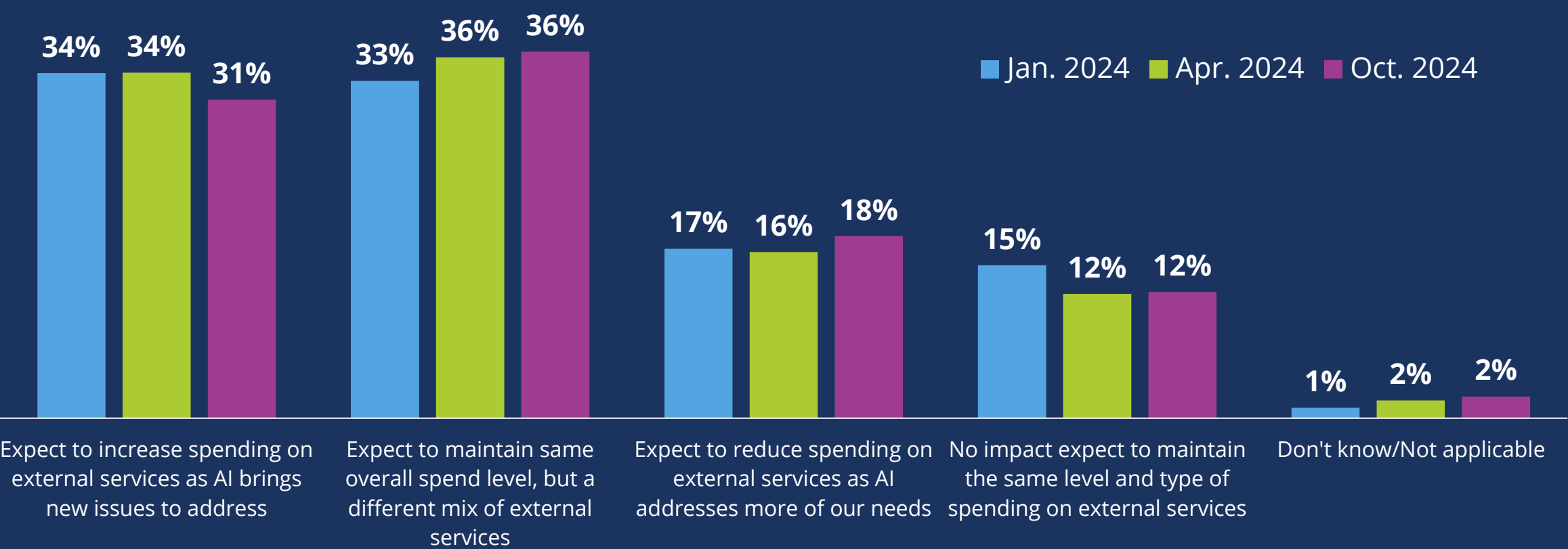
**Jennifer Hamel**

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Enterprise Intelligence  
Services, IDC



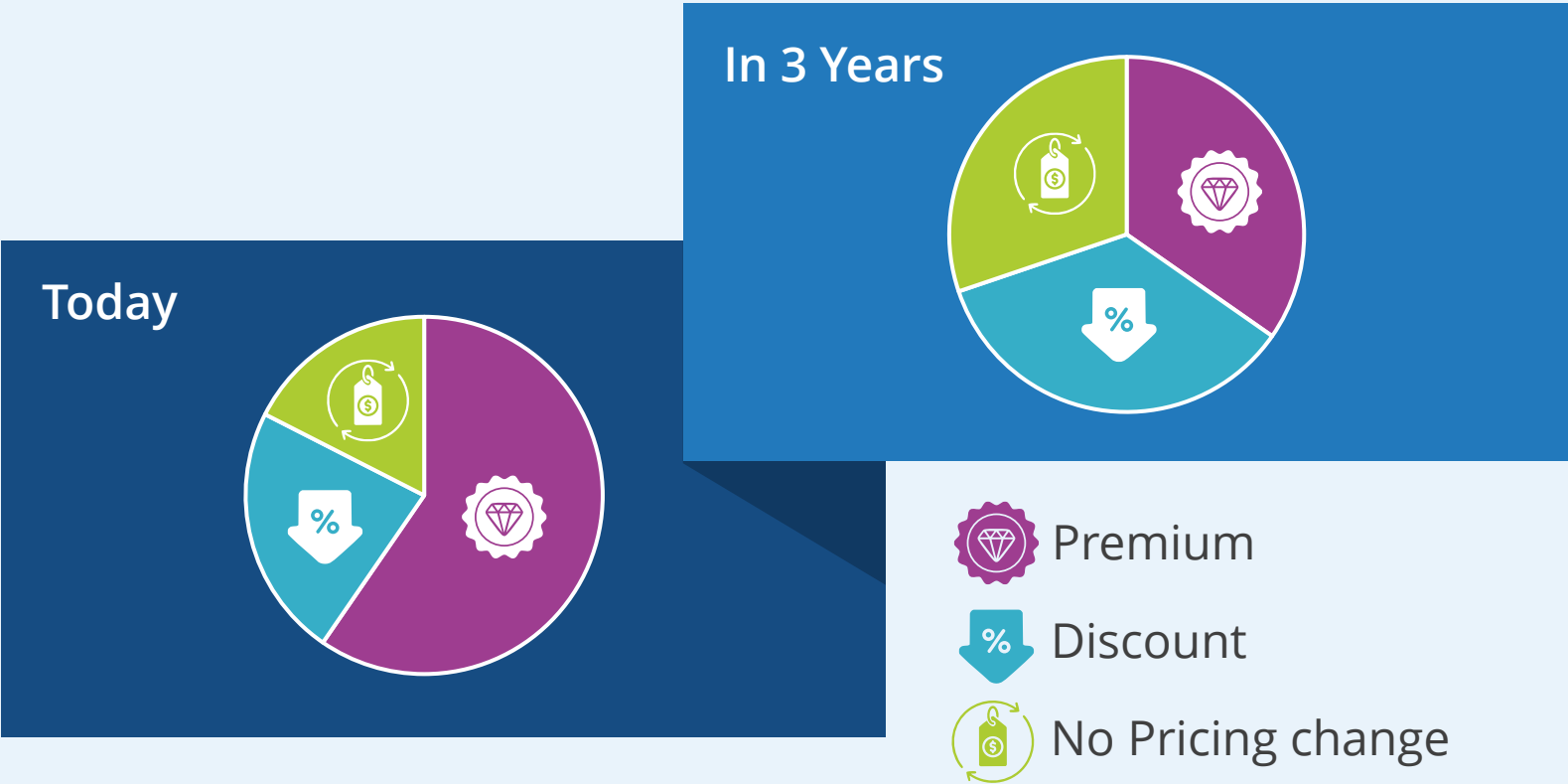
# Reflection on AI in 2024 included shifts in spending outlooks...

How do you expect AI will affect your organization's spending on external services over the next several years?



# ...And shifts in pricing expectations for AI-powered services

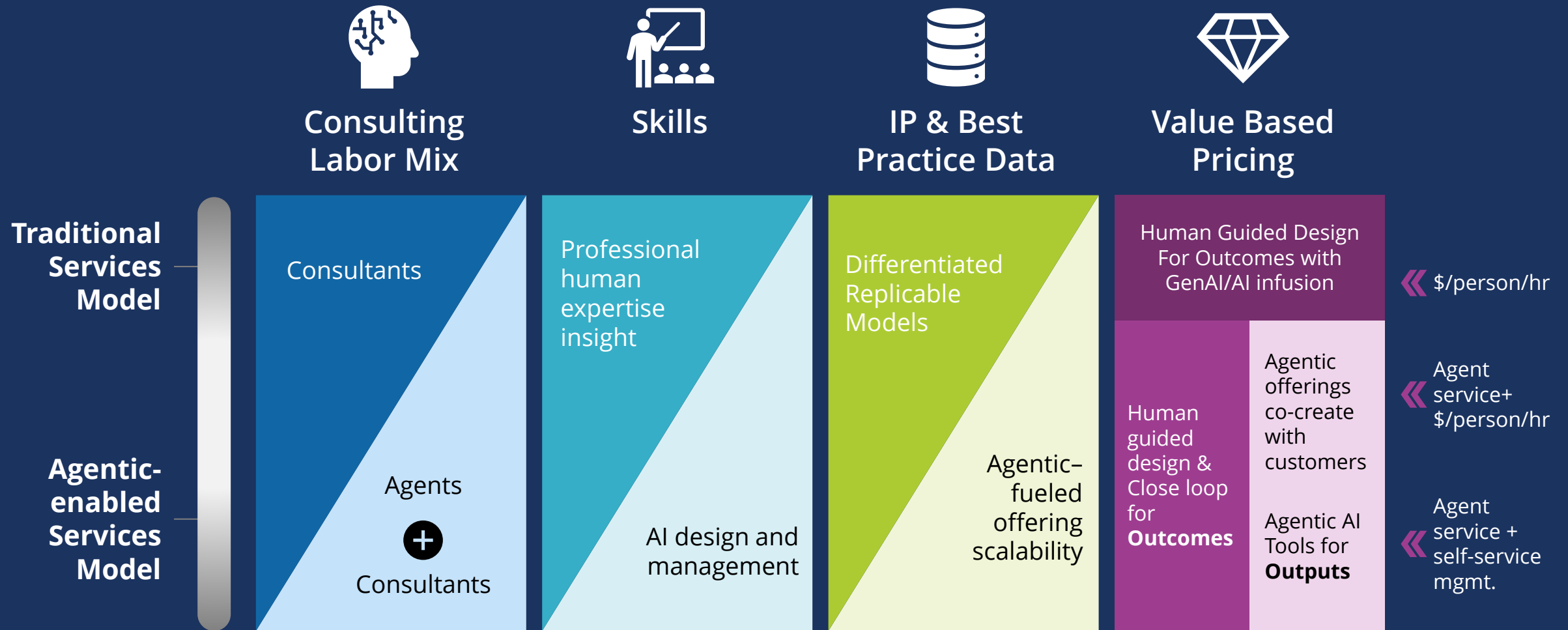
Considering a third-party services provider that utilizes GenAI for service delivery, how would you expect their pricing to compare with traditional service providers today and in three years?



“The pricing models that we have seen depend on the vendor, the business case, the complexity of the business case, and the number of users that we have.”

**Director, business services firm**

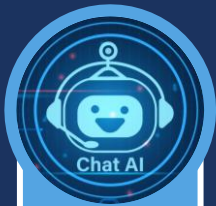
# How Gen AI and Agentic AI will change services businesses



# The impact of AI on the consultant-to-agent labor mix



## Focus on Productivity



**Assistant**  
Executes task



### Consultant Role

- Invoke request
- Apply data
- Take action

## Focus on Insight



**Assistant  
Advisor**  
Synthesizes info across  
data planes



### Consultant Role

- Invoke request
- Critically evaluate
- Develop insight
- Tailor to client's  
business context

## Focus on Innovation



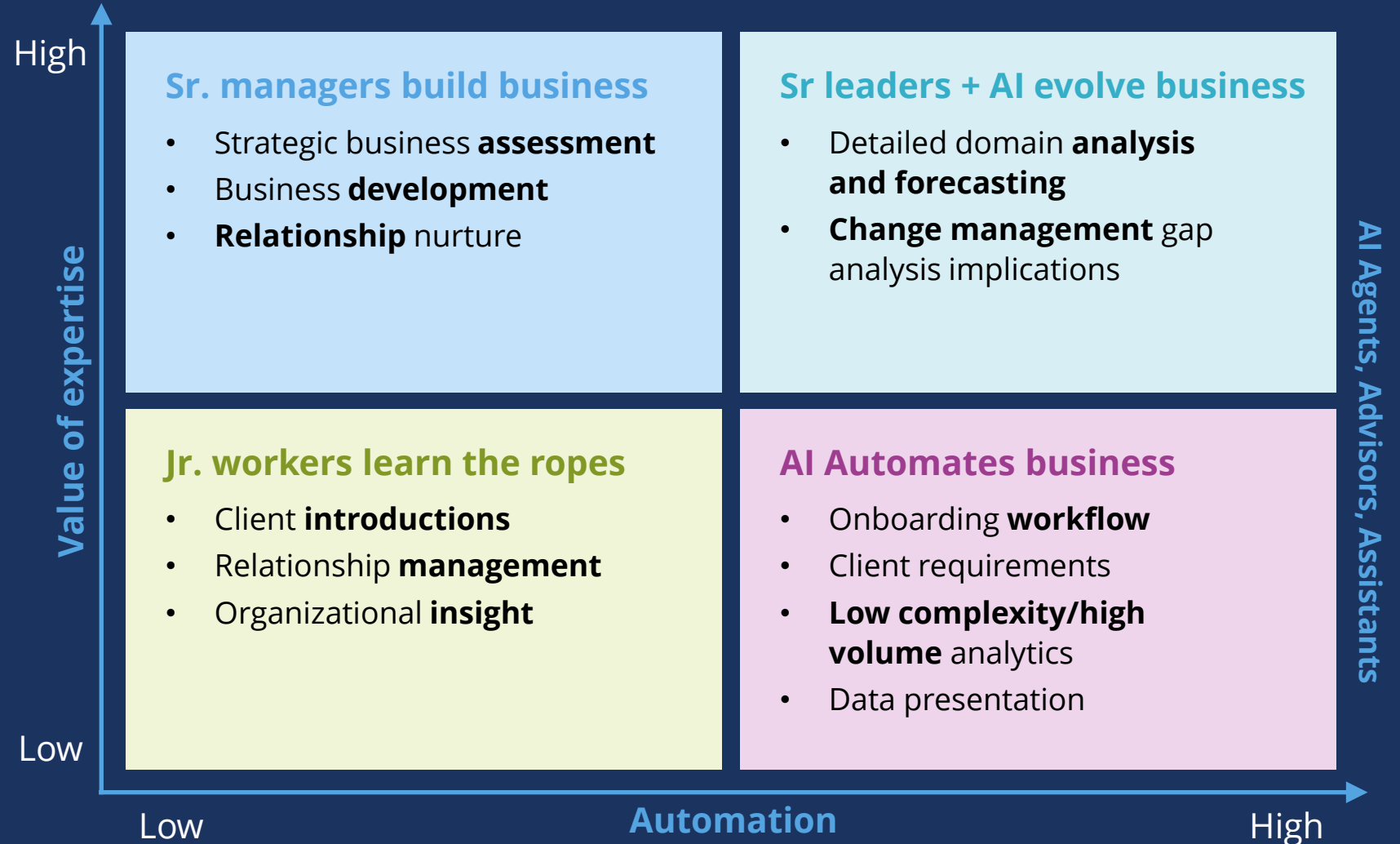
**Assistant  
Advisor  
Agent**  
Acts autonomously with  
other AI & humans



### Consultant Role

- Invoke request
- Critically evaluate
- Develop insight
- Rethink &  
re-engage AI
- Manage to client's  
strategic goals
- Innovate

# AI enablement shifts skills and responsibilities in services



# Agentic AI assets and methods address key buyer needs



## Top Services Activities Needed

**30%** Tracking and reporting metrics and KPIs to demonstrate successfully achieving key objectives

**28%** Automating business and IT processes

**25%** Providing access to and support for partner ecosystem (e.g., cloud providers, OEMs, ISVs)

**23%** Incorporating predictive capabilities in managing IT/business processes

**23%** Utilizing analytics to optimize performance



## Services Provider IP for Agentic AI



**Business value alignment frameworks** + AI agents to retrieve data from enterprise systems, monitor and report on outcomes



**Built-for-purpose AI agents** + reusable agentic architecture frameworks connecting business applications and IT workflows



**Multi-cloud, multi-model, multi-agent** frameworks and platforms to orchestrate complex technology ecosystems

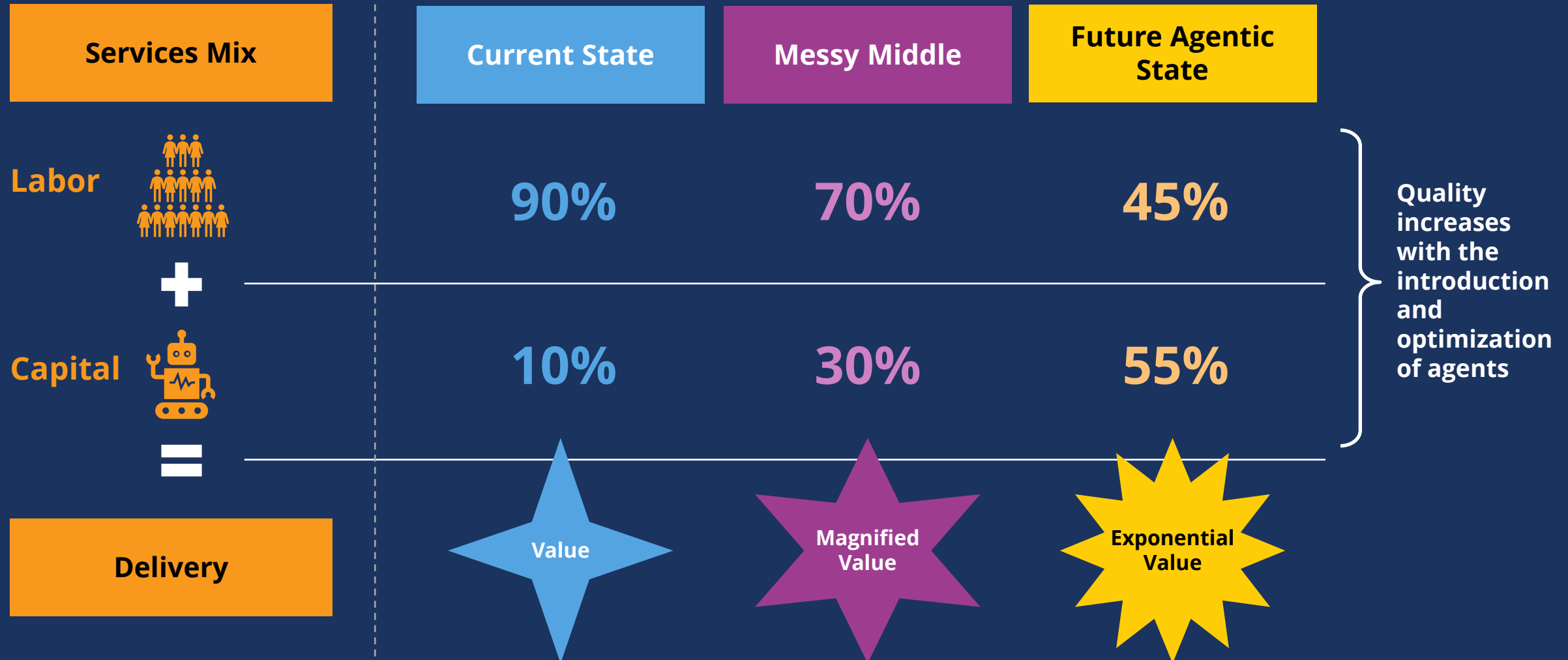


**Proprietary data sets, knowledge graphs, and SLMs** to enhance memory and planning capabilities of AI agents



**Industry-specific AI agent accelerators** preconfigured for relevant performance optimization use cases

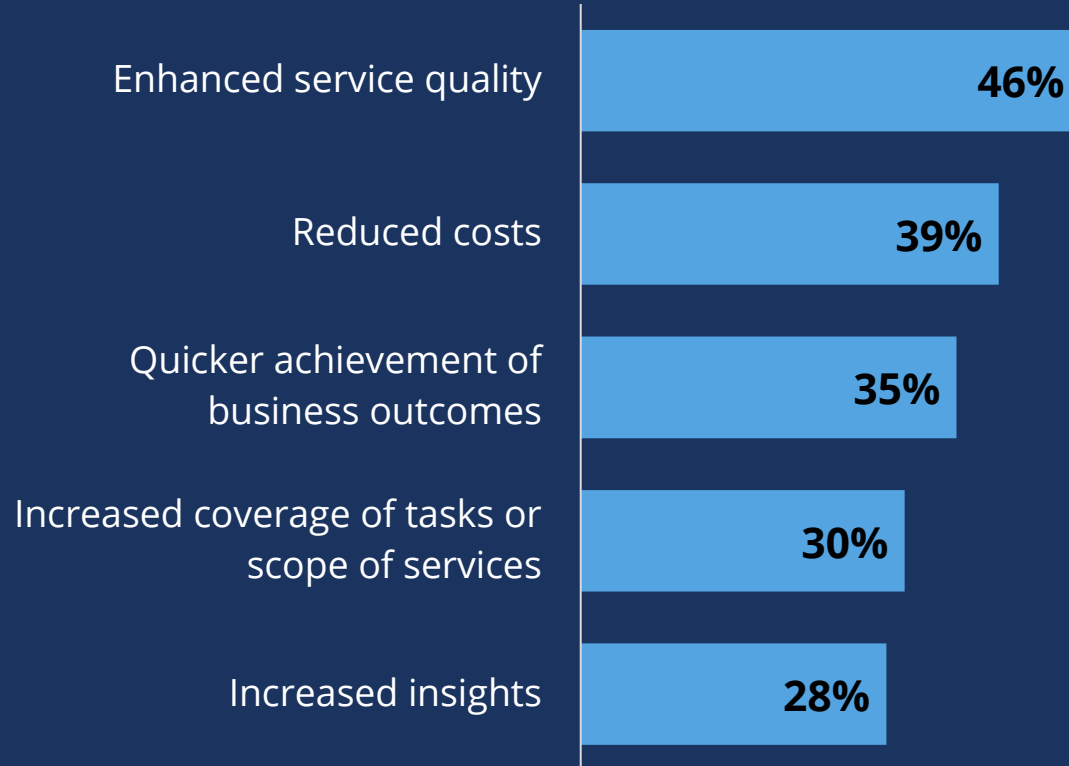
# Evolution of services value perception



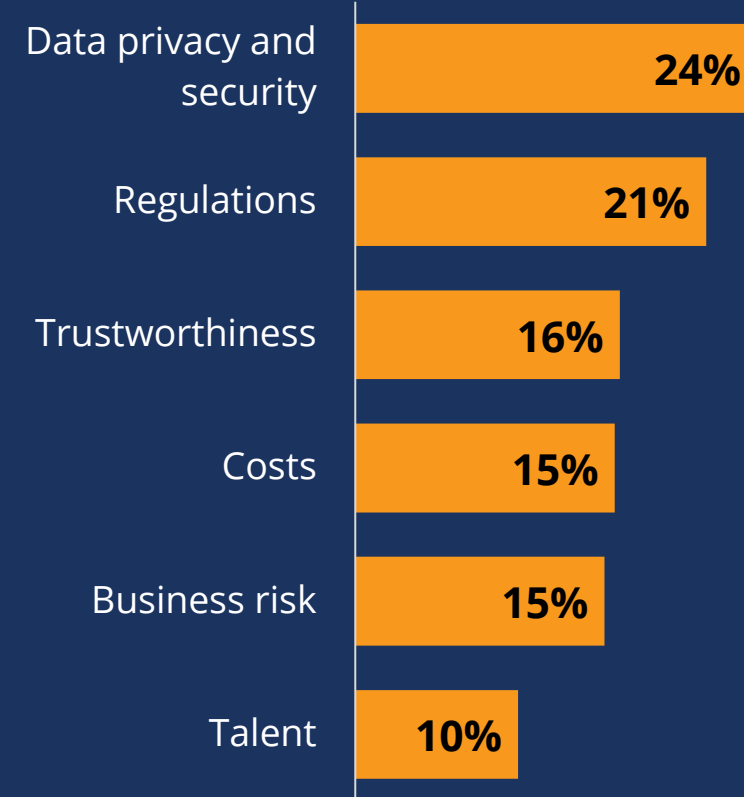


# Value generators and obstacles in AI-driven services

For which of the following benefits do you believe GenAI-infused services will generate the most value?



What do you foresee as the primary obstacle preventing your organization from paying a premium for GenAI-infused services?



# Changes in services work models: short-, mid-, long-term

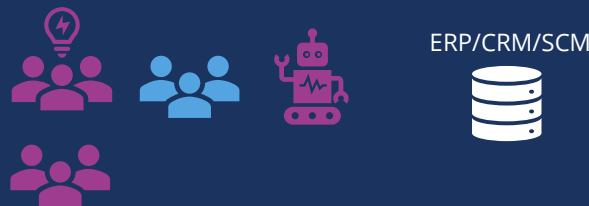
## Meaning of Service

## Operating Models

## Buyer Expectations

6-12 months

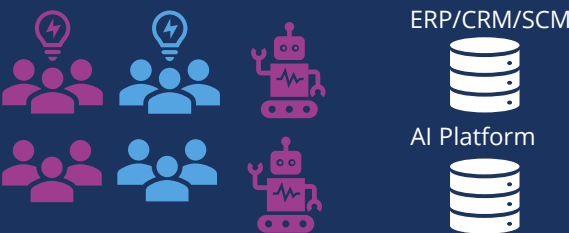
Provide people and technical tools to speed development of AI solutions



"Deliver the solution we ask for and supply the talent to do it faster."

12-24 months

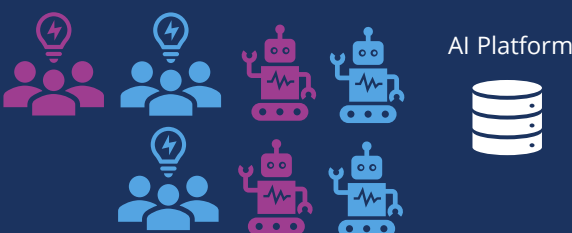
Provide human and technology platform which allows client to build innovative functions or maintain steady state



"Work with us to figure out what we really need and help us build our skills for the future."

24-36 months

Integrate agents and their human stewards to support client's AI platform



"Be there when we need you for the hard stuff, otherwise we and our agents can work with your agents."

Services Provider-led AI Delivery

AI-Enabled Buyer Organization

# Guidance for services providers

1

## Innovate Work Models

- Upskilling for higher-value expertise – AI agent design & management, relationship building, critical thinking
- IP assets centering specialized data, knowledge, and methods that reduce risks and improve client outcomes

2

## Innovate Pricing Models

- Levers of value-based pricing – human expertise, managed agentic offerings, self-service agentic tools
- Mind the narrowing window of premium price advantage – tie use of AI-driven services to customer value

3

## Innovate Engagement Models

- Transition from “delivering” AI solutions to driving outcomes through people + agents (yours + theirs)
- Ecosystem orchestration – enable continuous innovation and optimization of technology environment





# For additional information

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