nintex

The AI 'UNLESS' Report: From Hype to ROI

C-suite insights on unlocking
business value from AI

AI

Nintex surveyed 700+ CIOs and CFOs to find:

1.	ROI from AI initiatives is unlocked with automation
2.	For scalable AI, automation is a prerequisite
3.	AI governance and control need an automation foundation

A truly AI-powered world is on the horizon, if not already here. And there's no denying how transformative the technology promises to be — for greater employee efficiency, for cross-departmental workflows, for your bottom line, and for your place in an increasingly competitive landscape.

So now, every leader is feeling the pressure. Pressure to put AI to work so you can do even more with even less. Pressure to realize value on your AI initiatives. Pressure to crack the code of ROI on this transformative technology.

**Only there's a catch. AI isn't delivering the value most organizations expected. Unless, that is…**

The big "UNLESS…"

You may have seen MIT's latest "State of AI in Business" report, which found that despite $30–40 billion in enterprise investment, 95% of generative AI initiatives are producing no return:

Zero. Nothing. Bupkis.

Our latest research uncovers the big UNLESS behind that finding: The zero return on AI seems to apply **UNLESS the organization starts with a foundation of automation.**

When paired together, AI and automation increase efficiency, agility, and data oversight: A total of **95% of respondents in our study say their combined automation and AI initiatives are effectively delivering on business outcomes.**
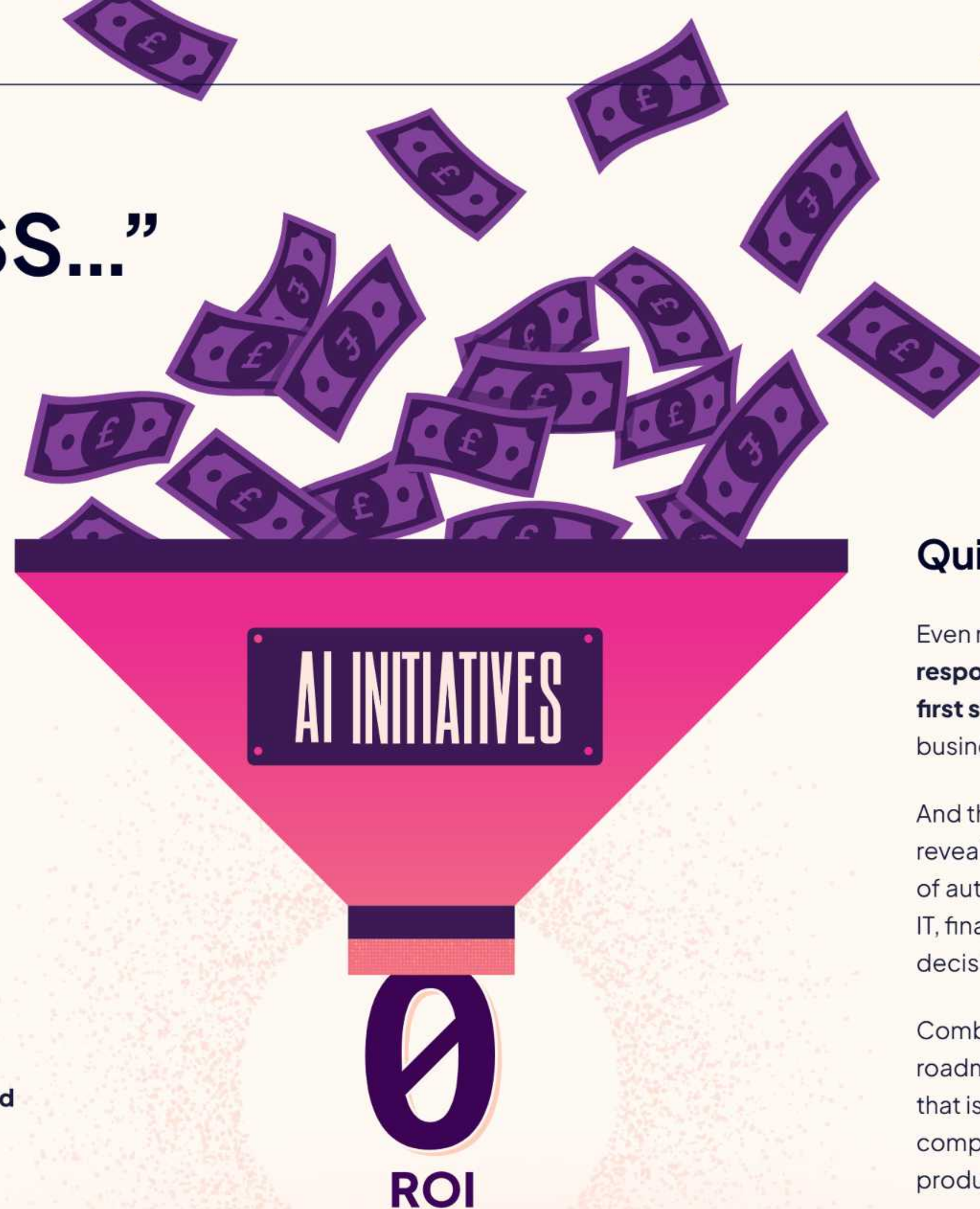
Quite a leap from zero return…

Even more notable, **84% of CIO and CFO respondents say that automation is a necessary first step** before successfully implementing AI in business processes**.**

And those stats are just the start. Our research revealed three major insights about the importance of automation in AI implementation that can guide IT, finance, and business leaders in strategic AI decision-making.

Combined, these insights provide an actionable roadmap to an automated, AI-powered organization that is more nimble, more efficient, more secure and compliant, more strategically aligned, and more productive than ever before.

AI INITIATIVES

0 ROI

The 1, 2, 3 combination to unlock ROI from AI initiatives

Survey respondents around the globe agree that implementing AI alone is not enough. To fully unleash efficiency, agility, and transformative outcomes, AI needs a foundation of automation. The research points to three major insights that will help you drive measurable success.*

INSIGHT 1

ROI from AI initiatives is unlocked with automation

AI may be the brain of organizational workflows, but automation is the muscle. Together, they drive improved quality, efficiency, innovation, risk management, governance, and cost reduction. Leaders who pair the two together report faster time to value, greater ROI, and enhanced agility, positioning themselves for long-term success.

INSIGHT 2

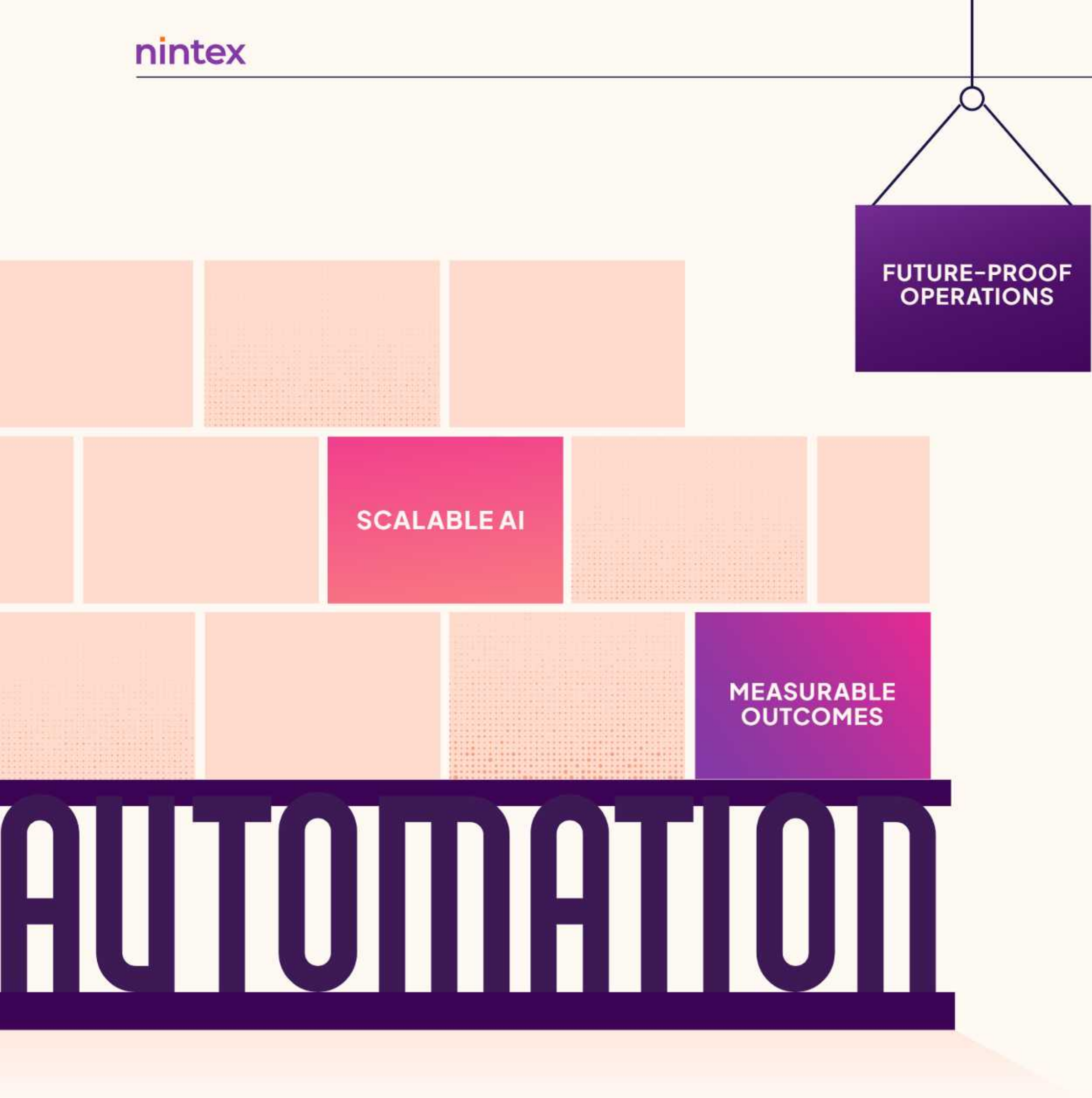### For scalable AI, automation is a prerequisite

Automation lays the groundwork for AI to scale across workflows, functions, and departments by standardizing processes, ensuring data quality, and enabling strategic expansion. Skipping automation introduces inefficiencies and risks and exposes AI initiatives to bottlenecks and the old trap of "garbage in, garbage out."

INSIGHT 3

AI governance and control need an automation foundation

Automation acts as guardrails for AI, ensuring compliance, transparency, and audit readiness while reducing governance risks. Automation ensures your AI operates within secure, ethical confines by drastically limiting non-compliance. When AI runs within the bounds of automation, organization-wide governance becomes architectural rather than aspirational.

*Based on a survey of 710 CIOs, CFOs and technology leaders from the US, Canada, UK, Saudi Arabia, Australia, and New Zealand

FUTURE-PROOF
OPERATIONS

SCALABLE AI

MEASURABLE
OUTCOMES

AUTOMATION

To maximize the value of AI across your organization, achieve measurable business outcomes, scale effectively, and protect your mission-critical operations from risk, it is crucial to begin your AI initiatives with a foundation of automation.

95%

of CIOs and CFOs surveyed
say automation + AI =
better business outcomes

INSIGHT 1

ROI from AI initiatives increases with automation

Businesses that have combined AI and automation report achieving better outcomes compared to using either technology alone. Organizations that previously relied on automation alone saw better outcomes after layering AI on top of automated processes. With both technologies in place, 63% of organizations report significant or transformational impacts on key workflows, with measurable gains in quality, efficiency, innovation, cost reduction, and risk management.

By comparison, AI alone provides operational benefits but lags in delivering complete ROI.

What delivers strong business results?

AUTOMATION ONLY

AI + AUTOMATION

AI ONLY

12%
say AI alone

21%
say automation alone

63%
say AI + automation
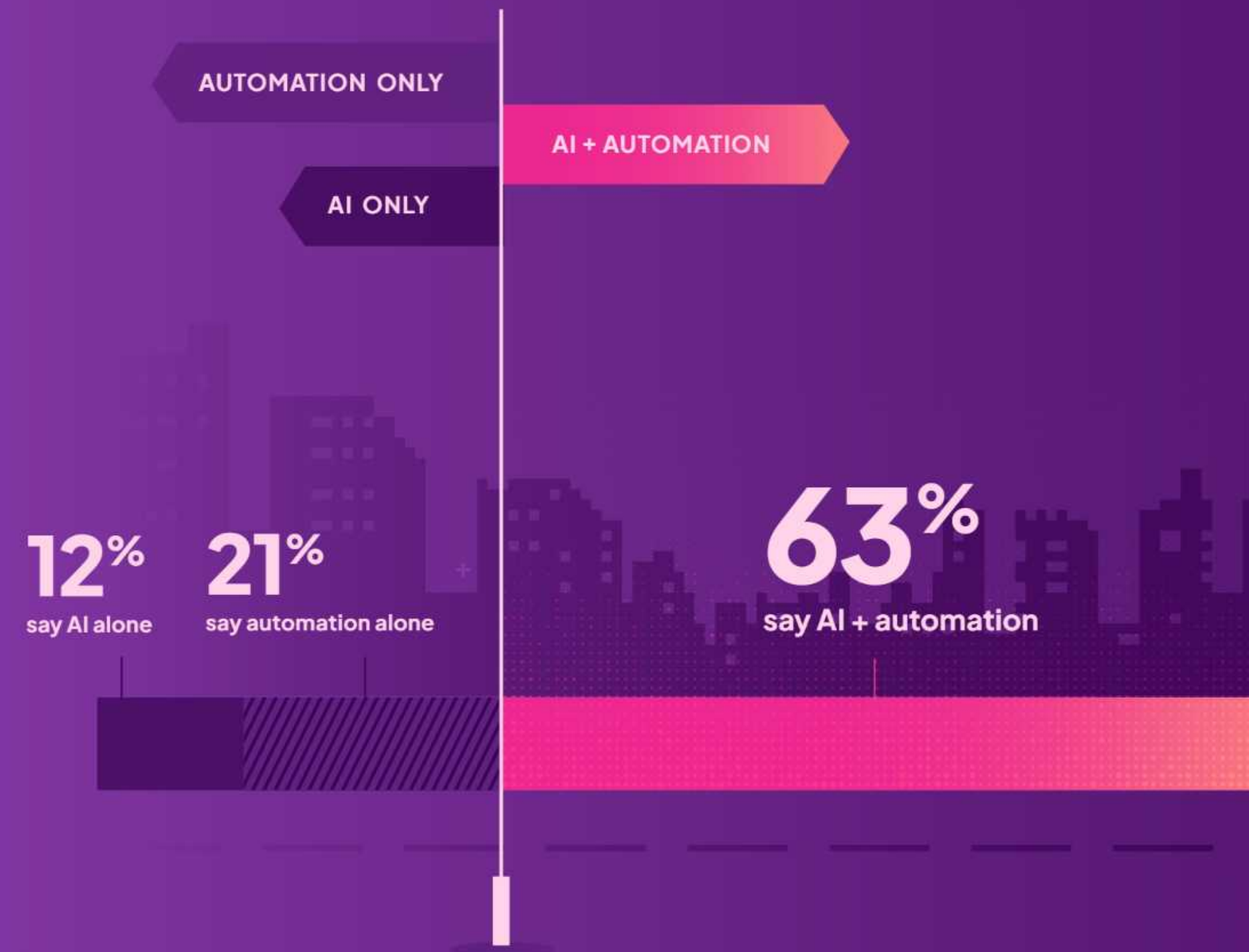
INSIGHT 1

AI alone has operational benefits, but does it fall short?

There's no denying that AI is changing how organizations and individuals work, shifting quickly from experimental pilots into operational tools. By itself, our survey respondents see AI as a positive, with 18% reporting transformational impact from active initiatives. While this is substantially better than the majority in the MIT study who saw no business value delivered, it comes nowhere near the 95% who have seen success with a combination of more mature AI + automation strategies.
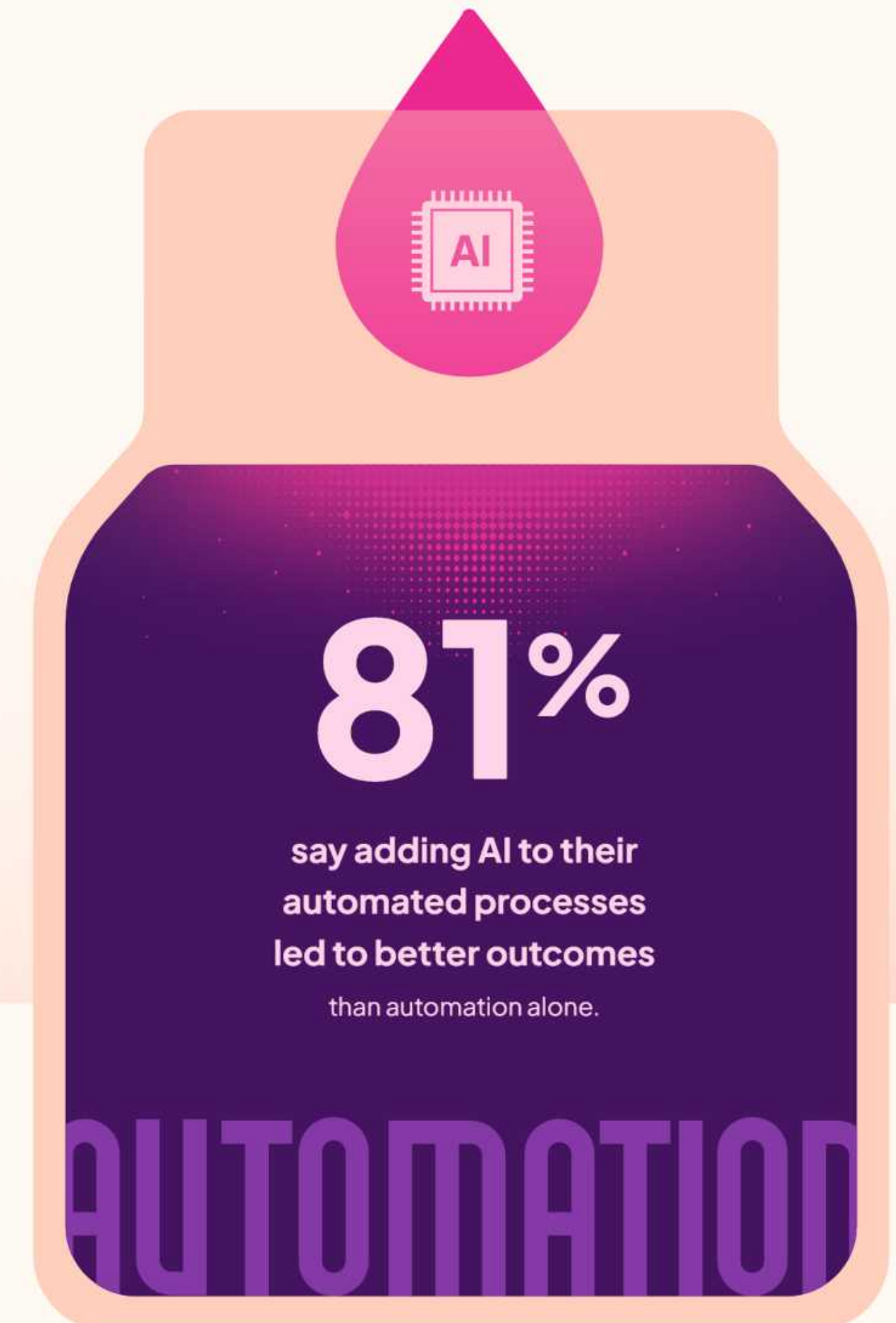
Of organizations that have implemented AI:

18%
see transformational outcomes

35%
experience significant impact

26%
see moderate improvements

2%
report no impact

81%
say adding AI to their automated processes led to better outcomes than automation alone.

AUTOMATION

INSIGHT 1

Automation maturity aligns with AI value delivery

Where the survey shows a boost in AI value delivery for organizations with a foundation of automation, it also shows challenges (and a minimal or moderate impact from AI) for those without automation capabilities. This correlation relates directly to automation maturity. The more automation-mature 58% of respondents show significant value from AI. The 42% still in the earlier phases of automation are vulnerable to the pitfalls of AI without automation, which leads to some positive impact but lacks delivery of deeper business value that goes beyond task productivity.

Top 3 AI value factors

1. High quality, accessible data

2. Leadership commitment and vision

3. Strong automation capabilities

EXPERT STAGE

ADVANCED STAGE

58%
saw tangible value from AI

38%
automated multiple tasks and processes

+

20%
deployed intelligent workflows widely

BASIC STAGE

EARLY STAGE

42%
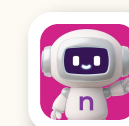ran into pitfalls with AI

18%
automated some repetitive tasks

+

21%
no implementation of automation

INSIGHT 1

Value unlocked with AI + automation

When identifying the top sources of value from AI and automation, respondents agreed that the combination most improved outcomes of quality, efficiency, and innovation.

% OF RESPONDENTS SAY TOP VALUE DRIVERS ARE:

Quality improvements   **56%**

56% say that AI + automation elevates accuracy and consistency across processes.

Efficiency gains   **51%**

51% say time and cost savings remain central but are no longer the whole story.

Innovation capabilities   **50%**

50% of leaders see AI + automation as enabling new products and services, not just process efficiency.

Cost reduction   **43%**

43% say cost reduction remains significant but is now balanced by broader strategic outcomes.

Risk management and governance   **40%**

40% say risk management and governance are critical validations that automation is not just about speed, but about building safe, auditable AI.

Quality, efficiency, and innovation lead the way

+7 hrs

By combining automation with AI, we reduced administrative workload by 5–7 hours per employee per week and cut compliance reporting time by 30%. Productivity rose 12%, while accuracy improved 15%.

EMEA RESPONDENT

INSIGHT 1

"

I achieved a 10% increase in revenue over the last quarter by streamlining processes and improving client engagement and also saved approximately 5 hours per week through automation and workflow optimizations.
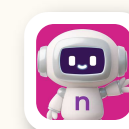
USA RESPONDENT

AI: It's not just for productivity anymore

While worker productivity and efficiency remain at the top of the reported reasons for adopting AI, it is now also aligned with more strategic objectives like innovation and better decision-making. These are leadership priorities that require a strong backbone of automation, and their importance naturally varies by role. CFOs are primarily concerned with AI's impact on productivity, whereas CIOs' first concern is quality and accuracy.

AI goals require a strong automation backbone

% OF RESPONDENTS SAY AI PRIORITIES ARE:

|	
Improve quality and accuracy	56%
Increase productivity	56%
Drive innovation in products/services	52%
Improve efficiency	45%
Reduce costs	39%
Enhance decision-making and insights	36%

INSIGHT 2

Automation is a prerequisite for scalable AI

One of the primary reasons organizational AI initiatives tend to fall short of expectations is their inability to scale effectively. While the technology may drastically improve an individual or small team's productivity, it begins to struggle when applied to more complex processes that span across multiple systems and departments. Unless, that is, those systems and processes are built upon and connected by a foundation of automation. Automation provides standardized processes, reliable data, and governance guardrails that act as force multipliers, allowing AI to scale.

84% of CIOs and CFOs **believe automation is a necessary first step** for successful AI implementation.
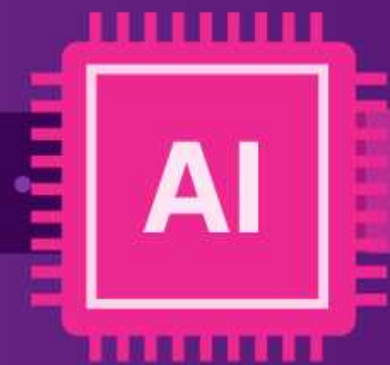
INSIGHT 2

Why automation first?

% OF RESPONDENTS SAY:

Establishes infrastructure 48%

48% say automation establishes the technical infrastructure needed for scalable AI

Provides clean data 47%

47% say automation provides the clean data foundation that AI needs to operate successfully

Standardizes repeat processes 47%

47% say AI needs standardized, repeatable processes to be effective
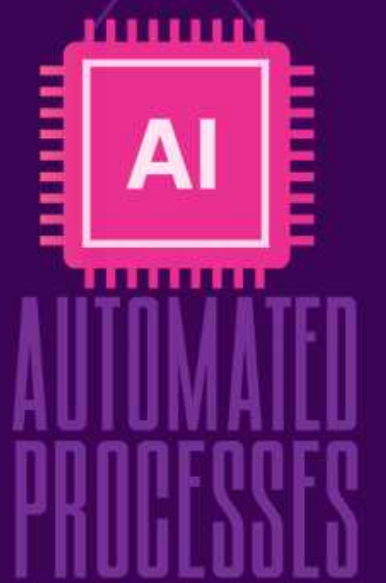
Easier to measure value 45%

45% say it's easier to measure the value of AI when built on automated baselines
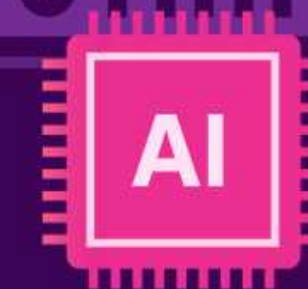
Optimize business processes 42%

42% say it's crucial to understand and optimize business processes before introducing AI

42%
of respondents
have layered AI on top of their existing automated processes

AUTOMATED PROCESSES

START

AI

46%
say they are
building automation and AI together from the start.

GIVEN THE RELATIVE RECENCY OF AI, THIS SUGGESTS MANY ORGANIZATIONS ARE USING AI IMPLEMENTATION PRESSURE AS A CATALYST TO FINALLY ADOPT MEANINGFUL PROCESS AUTOMATION.

INSIGHT 2

The "pilot purgatory" problem

The challenge of AI scalability keeps many organizations trapped in "pilot purgatory." They can get AI working in controlled environments with skilled, dedicated resources, but they can't industrialize it. The orchestration gap is particularly critical because it suggests these organizations are trying to add AI as an ad-hoc layer on top of fundamentally manual, unstructured operations.

To avoid pilot purgatory, plan for scale from the onset. Don't treat AI implementation like a test case for an inconsequential process, or you'll inevitably struggle to ascertain the true value of your pilot, leading to decreased funding and resourcing for growth. Instead, build it onto your process automation platform and plan to maximize strategic impact.

Organizations that successfully scale AI are those that solve their foundational problems first:

1. **Build process orchestration to eliminate bottlenecks and fragmented manual processes**

2. **Establish governance within those orchestrated processes to place your guardrails**

3. **Use automation to augment existing talent and reduce any real or perceived skill gap**

4. **Demonstrate value through scaled deployment to justify your budget**

CIOs are more than

2X

more likely than CFOs

to say AI has made a transformational impact on their organization's processes and workflows.

BEHIND THE DISCREPANCY

CIOs are experiencing positive gains in employee performance around specific tasks, but the broader financial return CFOs are waiting for is a lagging indicator of success.

INSIGHT 2

Overcoming the paradox of barriers to scaling AI

Some of the very challenges keeping executives from scaling AI are best solved with automation. However, overcoming these barriers can be difficult because they tend to reinforce each other.

Break the negative reinforcement loop by establishing a strong automation foundation *before* trying to implement or scale AI. Automation enables AI to scale by standardizing processes, ensuring clean data, and providing governance guardrails.

As a result, what once looked like barriers transform into opportunities. Top challenges like skills gaps, compliance concerns, and budget limitations make way for templated training programs, governance guardrails, and meaningful cost reductions.

How these barriers reinforce each other

Budget constraints prevent hiring talent and building infrastructure.

Lack of talent means governance frameworks never get properly implemented.

Without automation, you need more skilled people to manually manage processes and workflows, which increases costs.

Poor process orchestration means AI projects don't deliver ROI, which tightens budgets further.

Without governance, you can't standardize processes, making orchestration harder.

HIRING

INSIGHT 2

The barriers to scaling AI are the opportunities

5 Top barriers
for CIOs

1. Lack of skilled talent

2. Governance and compliance

3. Budget limitations

4. Lack of automation orchestration

5. Cultural resistance

5 Top barriers
for CFOs

1. Governance and compliance

2. Budget limitations

3. Cultural resistance

4. Lack of automation and orchestration

5. Poor data quality or access

Collectively, more respondents (19%) cited governance and compliance concerns as the biggest barrier to successfully scaling AI, outweighing even budget limitations (18%).

Fortunately, governance and compliance concerns are all but eliminated with ... you guessed it ... a foundation of automation.

At Nintex, the agentic AI capabilities built into our platform help eliminate common barriers to building the crucial foundation of automation that allows AI to succeed and scale.

INSIGHT 3

AI governance and control rely on an automation foundation

GOVERNANCE IS GROWING IN IMPORTANCE ALONGSIDE TECHNOLOGY.

32%

named **risk management and governance as a top priority** when choosing to implement AI technologies.

There's no denying the nearly limitless power of AI, even in its relative infancy. But as a wise man once said, "with great power comes great responsibility." And if AI goes unchecked, ownership of that responsibility is murky at best.

The challenge isn't building AI that works — it's building AI that works responsibly, consistently, and demonstrably within secure ethical and legal boundaries across thousands of use cases.

Many organizations struggle to launch and scale AI pilots because they lack systemic control over how data flows through their systems, how decisions are made, and how sensitive information stays secure.

But AI isn't an inherent compliance risk, if it's built upon a foundation of process intelligence and automation. IT leaders see automation as the guardrails for AI — protecting their interests and lowering risk. Organizations with strong business orchestration capabilities were more likely to report confidence in their ability to scale AI while maintaining control. And respondents emphasized that automation reduces the risk of data quality issues and governance failures — some of the most common barriers to AI success.

INSIGHT 3

Governance and compliance by the numbers

40%

of organizations cite

consistent compliance and governance

as one of the primary reasons for relying on process automation technology.

45%

would advise other leaders to

establish strong governance frameworks

before trying to scale beyond one-off AI use cases.

41%

of CIOs and CFOs cite

improved governance and risk management as top outcomes of AI + automation.

40%

use compliance as a success metric

right alongside ROI, productivity, and customer satisfaction.

30%

say risk management is

now a tracked metric for AI projects.

INSIGHT 3

For proper governance, AI needs automation guardrails

As the influence of technology continues to grow, so does the need for organization-wide governance. And while IT governance has traditionally focused on internal organizational concerns (like managing databases, networks, and customer data), today's tech governance extends to broader, more complex issues, including the regulation of AI.

Good governance balances innovation with responsibility, enabling technological progress while protecting stakeholders from potential harm. And at scale, it can no longer be left entirely to humans. Business orchestration platforms can serve as **structural scaffolding** that keeps AI systems operating within safe, compliant boundaries.

BUSINESS ORCHESTRATION

INNOVATION

RESPONSIBILITY
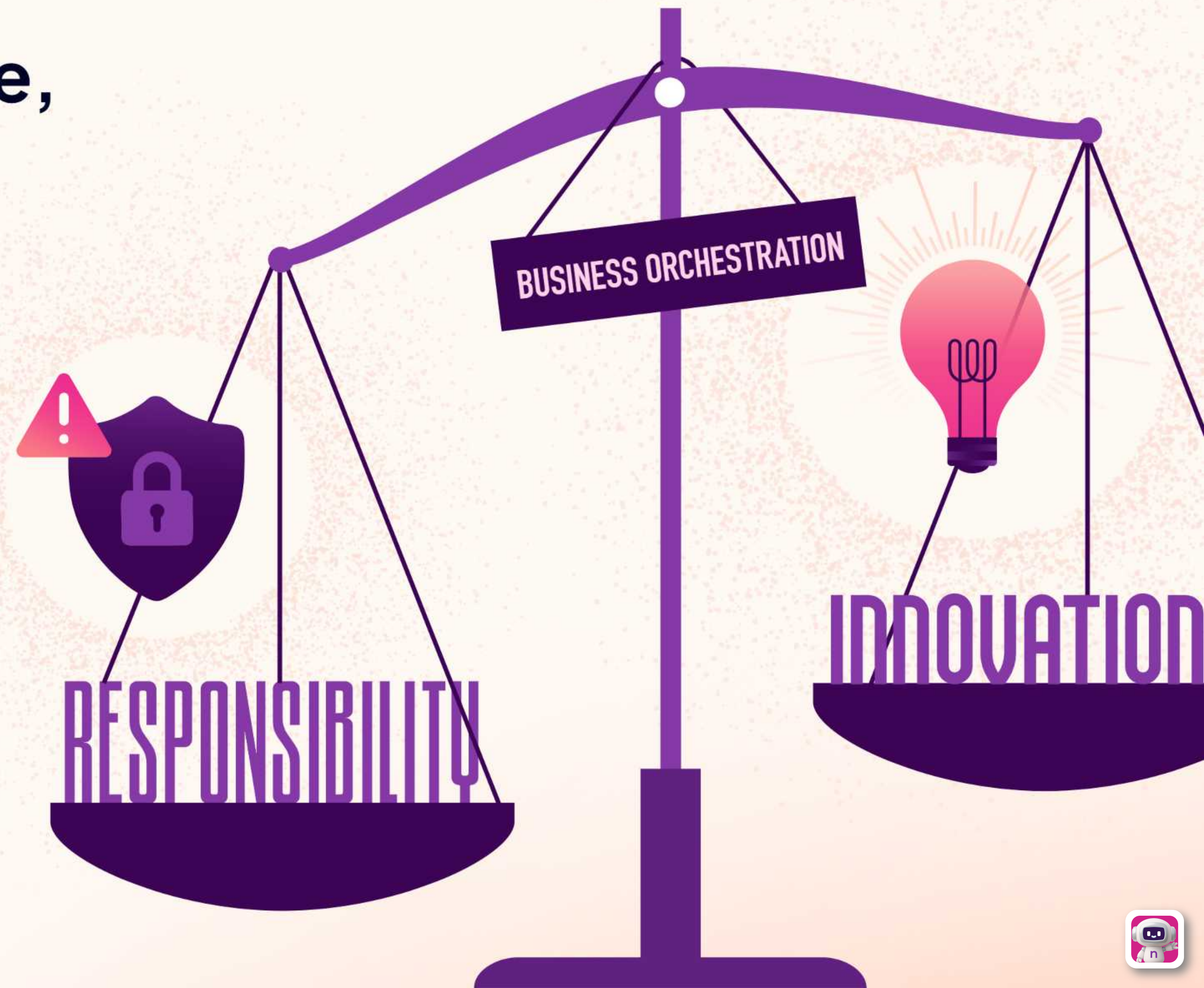
INSIGHT 3

Here's how automation improves AI governance:

Embedding rules into workflows

Process automation essentially hardwires compliance requirements into the operational flow. Rather than relying on AI to independently interpret regulations or ethical guidelines, automated processes create predetermined pathways that AI must follow.

Forcing human-in-the-loop checkpoints

Well-designed process orchestration can mandate human oversight at critical junctures. The system might automatically route certain AI decisions — perhaps those above a risk threshold — to human reviewers. The AI can't bypass these checkpoints because they're structurally embedded in the workflow, not just policy suggestions.

Managing version control

Process orchestration can systematically monitor AI model performance over time, triggering alerts when accuracy degrades or bias metrics shift. It can enforce mandatory retraining schedules, validation testing before deployment, and rollback procedures.

Creating default audit trails

Automated processes naturally generate logs and documentation at each step. When AI operates within these frameworks, you get built-in transparency — every decision, input, and output is tracked.
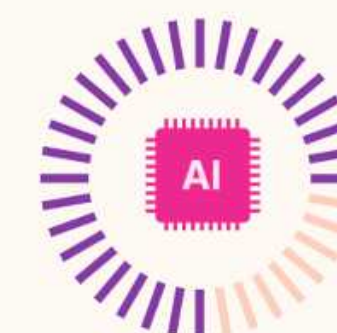
Standardizing data handling

Automation can enforce data governance rules: ensuring data is anonymized when required, limiting access based on permissions, automatically deleting information after retention periods expire, and preventing AI from accessing prohibited data sources.

Limiting scope and authority

Perhaps most importantly, automation defines the boundaries of what AI can actually do. An AI might be capable of many actions, but the automated process only grants it authority within specific contexts.
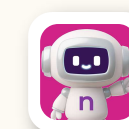
Unify automation + AI with Agentic Business Orchestration

So where does all this insight leave the global C-suite?

Our recent survey of 2,000 global IT decision-makers, The SaaS Sprawl Snapshot, found that more than half (51%) of mid-sized organizations have between **100 and 300 separate SaaS tools in their tech stacks**.

That kind of sprawl and the resulting disconnect between systems not only leads to unnecessary manual data entry and duplication, poor user experiences, and workflow and approval delays, but is a nightmare of an environment for scalable, governed AI that proves its value.

To reach its potential, AI must work seamlessly with your organization's legacy systems, tools, and workflows. The best way to ensure this unity is with a consolidated platform that unites AI, workflow, and human innovation.

IT and finance leaders agree:
64% of responders say they intend to embed or consolidate AI into their automation strategy.

That move to consolidation underscores the need for agentic business orchestration, which unifies automation and AI together in one platform, putting

humans in control of driving strategic outcomes for critical operations. With agentic business orchestration, AI is no longer a bolt-on experiment prone to pilot purgatory. It becomes the brain, automation provides the muscle, and process orchestration ensures the two work together to drive measurable transformation.
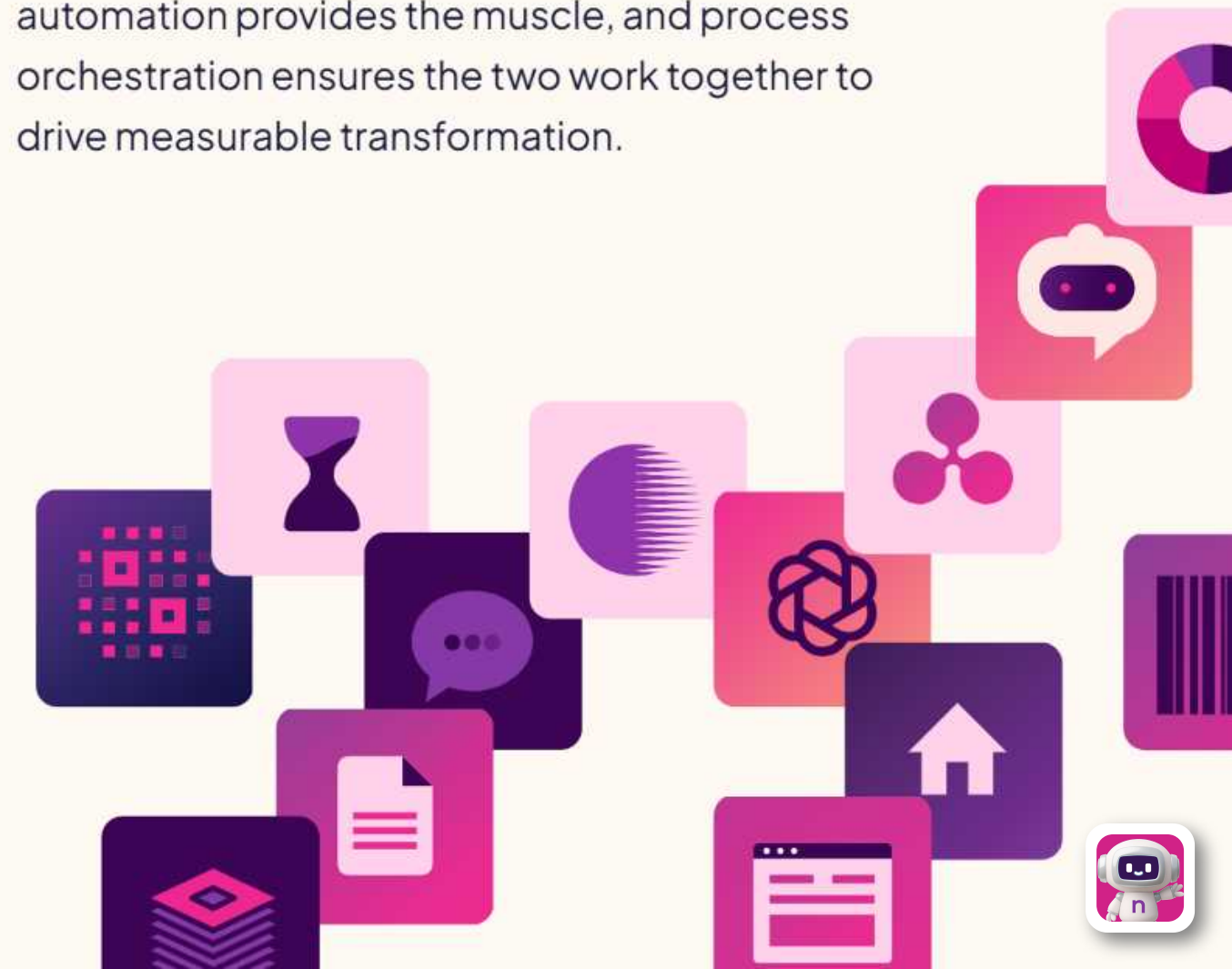
What have CIOs and CFOs learned?

The top 4 tips from the C-suite:

1. Bridge the gap of UNLESS

To support any AI initiatives you pursue now or in the future, CIOs and CFOs agree that you need **a foundation of automation**. And that foundation needs to come first. As you're mapping out your goals and objectives, identify any manual processes that can be automated or disconnected systems that would benefit from a unified process.

3. Craft a roadmap aligned with business KPIs

To build a plan that achieves your goals, there must be agreement on what those goals are. From envisioning to planning to execution, every step of your AI and automation progress should support the long-term and strategic goals of your company. Make sure you have consensus — and enthusiasm — by starting with **process intelligence**.

2. Invest in employee upskilling and reskilling

Transform the barrier of skill into an opportunity. Build on the skills already present in your organization to create not only a human foundation for excellence, but a culture and mindset that puts AI and automation at the forefront of planning and execution.

4. Establish strong governance frameworks

Don't overlook the power of automation to serve as your governance layer, providing consistent, auditable data. And it's not just about compliance; automation allows you to feed your AI data that's been vetted to lower risk and reduce errors.

CIOs and CFOs urge you not to rush the process.

45%

regret moving too fast,
underestimating automation, governance, and risk planning.

TO ENSURE YOU'RE PREPARED TO IMPLEMENT AND SCALE AI EFFECTIVELY, TURN TO THE EXPERTS AT NINTEX.

WE ASKED; IT AND FINANCE LEADERS ANSWERED.

Words of wisdom from your peers

What's the biggest lesson your organization has learned about AI and automation so far?

1.	The need for strong data foundations
2.	That automation or AI alone won't fix broken processes
3.	Skills gaps and training are ongoing challenges
4.	Governance / risk management must be built in early
5.	Executive buy-in is critical

What advice would you give other IT leaders trying to scale beyond one-off AI use cases?

47% say align AI goals with business KPIs

47% say invest in employee upskilling and/or retraining

45% say to establish strong governance frameworks

45% say to begin with a clear roadmap and vision

What has been your organization's biggest AI regret or mistake so far?

| 1. | Underestimating the preparation or foundational requirements necessary |
| 2. | Moving too quickly without governance or risk planning |

The UNLESS uncovered:
AI + Automation = ROI

AI alone can create individual productivity gains, but it takes automation to make it scalable, governable, and a true value driver. Among CFOs and CIOs, the strongest consensus emerged around these points.

PERCENTAGE OF RESPONDENTS:

Say automation plus AI is effective   **95%**

Agree that automation is a prerequisite   **84%**

Say they are already acting on embedding or consolidating AI in automation   **64%**

It's our mission at Nintex to keep you ahead of the curve by providing business orchestration, process automation, and governance capabilities that help

you build the solid automation foundation AI needs to thrive. The future isn't about piling on more AI tools. It's about creating a unified platform where automation and AI work together to drive efficiency, innovation, and confidence at scale. Two-thirds of leaders are already planning that consolidation.
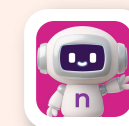
So, the lesson is simple. If you want to move from AI experimentation to business transformation, automation has to come first. Nintex helps you get there — so that AI doesn't just promise value, it proves it.
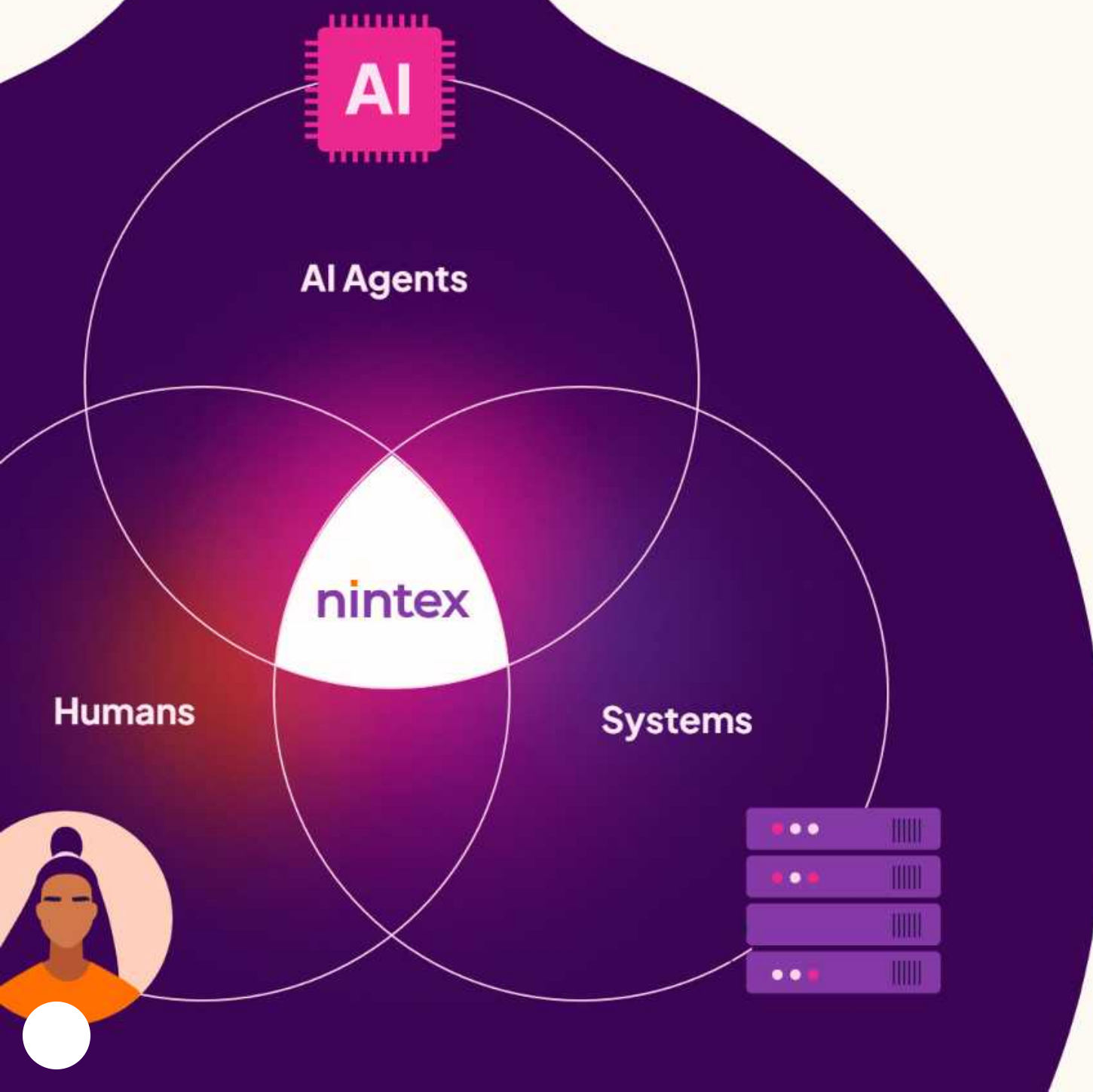
Explore the future of AI + automation

Discover more

95%
find automation + AI effective

Nintex CE: The agentic business orchestration platform to help you unlock the true value of AI

Agentic Business Orchestration enables users to unite human, system, and AI agent interactions across an organization, with a single platform — rooted in process intelligence and powered by agentic AI — to orchestrate outcomes through purpose-built solutions.

Unite humans, systems, and AI agents in one platform

Nintex helps organizations unlock the power of endless possibilities. Our Nintex CE platform unifies process intelligence, agentic workflow orchestration, and AI-driven solution building in one place to harmonize people, processes, data, and AI agents under a governance framework.

THE RESULT?

Organizations remove friction from mission-critical operations and inspire teams to build a culture of efficiency that accelerates the success of strategic outcomes.

Unite humans, systems, and AI in one platform to…

UN leash the power of process intelligence

Understanding how work and data flow through an organization is a necessary part of creating efficient workflows and establishing an AI strategy. With process intelligence, organizations can lay the planning foundation of AI.

UN cover the potential of purpose-built solutions

Nintex low-code app development and generative AI assistants, empower teams to design, create, and deploy tailor-made solutions quickly. All these solutions can be easily integrated into core business systems, like ERPs, CRMs, and HRIS to drive innovation and deploy organization-wide.

UN lock efficiency with workflow orchestration

Workflow orchestration agents autonomously manage workflows, make intelligent decisions, and drive multi-step operations without constant human intervention. This enables organizations to adapt in real time to changing business conditions while freeing teams to focus on strategic work.

UN compromised governance

The speed of AI must be balanced with governance so that every process, decision, and action flows seamlessly from trigger to outcome. Agentic business orchestration allows users to capitalize on low-code tools and AI without compromising on governance.

That's the power of UNLESS.

Learn how you can maximize efficiency with the power of agentic business orchestration.

IT Leaders   Finance Leaders

ABOUT THE SURVEY

The research was **conducted by Censuswide** in August and September 2025. The survey included a sample of **710 senior IT and finance executives** who are involved with AI in companies with **250–5,000 employees** in the UK, US, Canada, Australia, New Zealand, and Saudi Arabia. All participants work in companies that have implemented process automation, Application development, RPA, Generative AI, or Agentic AI within their companies. Censuswide abides by and employs members of the Market Research Society, which is based on the ESOMAR principles. Censuswide is also a member of the British Polling Council.

nintex

Nintex, the possibility engine™, helps organizations unlock the power of agentic business orchestration by combining process intelligence, workflow orchestration, low-code development, and agentic AI to build solutions designed for their unique business challenges. Today, more than 7,000 public and private sector organizations across more than 100 countries rely on Nintex and its global partner network to supercharge business process orchestration, create purpose-built solutions, and unlock the full potential of their people.

Learn more about how Nintex and its global partner network are propelling people, work, and business forward at **nintex.com**.