# CIO REPORT: Emerging Technology Adoption 2024

Navigating AI Risks, Rewards and ROI





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## Foreword

# Disrupt or be disrupted – that's the reality of our modern digital world.

In this era of unprecedented technological advancement, those who are quick to not only adopt new technologies, but to fuse them into the fabric of their business, can conquer new markets and dominate the cultural conversation. We have seen this time and again. Yet it is not since the internet itself emerged that we have seen such **potential as that posed by Artificial Intelligence** today.

The public launch of ChatGPT triggered a **modern-day goldrush**, as organizations sought to stake their own claim on the frontier of AI-driven innovation. <u>IDC forecasts</u> global spending on AI will exceed \$500 billion in the next three years, and spending on Generative AI alone will hit <u>\$26 billion</u> by 2027.

Investing in emerging technologies like AI is not for the faint of heart. While it can deliver huge rewards – it also comes with greater risk. To reap the rewards, organizations must be prepared to take **a leap of faith into uncharted waters** – accepting they will not fully understand the return on investment (ROI) or benefit right away. To thrive in this new frontier, organizations must not only invest in innovation, but have the structures, processes and systems in place to manage and mitigate risk, and sharpen their view over time, as new data and insights become available.

Adaptability is the cornerstone of success. Change is not just inevitable; it's the lifeblood of progress. Organizations must assume they will be uprooted and position themselves to be able to pivot to stay on the path. By harnessing data to inform decision-making at every turn, research and innovation teams can **navigate the complexities** of emerging technologies with confidence and precision.

This report shows that there is a huge opportunity for organizations to achieve a greater return on investment (ROI) from emerging technology – if they are able to work smarter and embed new technologies with minimal disruptions. To succeed in this, CIOs must arm themselves with data, insights, and information across the **five critical dimensions** of emerging technology research projects:

Customer and business value
Strategy alignment and orchestration
Security, ethics, and governance
Technology and data
Workforce and organization

Armed with these insights, organizations and their teams will have a greater **understanding of the risks, costs, impacts**, and likely outcomes associated with their projects. This makes them better placed to absorb, adopt, and leverage AI and other emerging technologies, and convert them into tangible business value. An Enterprise Architecture (EA) and the tooling that supports it can provide these capabilities. However, success hinges on a shift in the perception of EA from being an IT capability, to a critical business discipline.

We hope you will find some valuable insights within these pages to fuel your innovation engine, propel your organization to new heights and gain a **stronger ROI from emerging technologies** – be that AI, or whatever comes next.



**Erik Bakstad** CEO and co-founder Ardoq



**M. Hans Delly** Managing Director Slalom

# **Executive Summary**

This report examines the current state of emerging technology research and innovation projects within large global enterprises, based on a survey of 700 CIOs and other senior IT leaders in organizations with more than 2,000 employees.

It explores the driving forces behind the continued interest in emerging technologies, such as AI, shining a light on the potentially transformative impacts they can have. The report identifies the **key challenges** organizations experience as they try to realise these benefits and highlights how they can overcome them by adopting a mature, **data-driven execution** strategy.

#### Key takeaways include:



A sense of urgency is driving adoption of emerging tech, like Al. IT leaders are aware of the risks of inaction when it comes to emerging technology and are keen to prevent space from building between themselves and their competitors. This is particularly true with Al, where the potential of the technology is so great. Ultimately, failing to invest in the future could be the biggest risk a business can take.



Many are taking a leap of faith without a safety net. While experimentation should be welcomed, it must be tempered with restraint. The rush to invest in AI is leading many organizations to throw caution to the wind. This is creating risks and challenges – from potential regulatory issues to ballooning costs, resource use, and outright project failure.



**The path ahead is not always clear.** Empowering teams to react quickly and alter course constantly throughout emerging technology research projects is essential to success. Organizations must continuously pivot and reassess their goals, ROI, and approach as their understanding of technologies improves.



A structured process is key to balancing risk and reward. The experimental nature of emerging technology research increases the risk of failure, but if they succeed, organizations stand to gain a significant competitive advantage. Balancing this risk and reward requires robust mechanisms to identify the benefits and control the risks, but many businesses lack these controls.



Up-to-date insights and data underpin successful adoption.

Slow and error-prone impact analysis is preventing teams from understanding the effect a new technology will have on their existing architecture, hampering organizations' ability to embed emerging technologies. Having this understanding is essential to accelerating delivery, mitigating risk, and minimizing disruption to the business. This report identifies that there are **three factors CIOs need** to master to maximize success: balancing risks and rewards during emerging technology adoption; taking a long term view on their investment decisions; and maturing their enterprise architecture from an IT function to a business discipline. In this report, you will learn more about why these factors matter and what steps your organization can take to drive success on your innovation journey.

#### Key considerations before embarking on **emerging technology research**

As you read this report, it's worth considering how these findings apply to your organization and **what gaps you may have** that are preventing you from realising the full value of emerging technologies – here are five questions to start you off:



Do you have an operating model or platform to support project execution?



What data do you need to drive alignment between people, processes and technology?



What tools do you need to balance the trade-offs of emerging technology research?



How can you better understand the impacts, costs, risks, and benefits of emerging technologies?



How will you absorb a new technology into the existing enterprise architecture?

# **91%**

of CIOs say that, if successful, their investments in emerging technologies can put them at the **forefront of their market**.



of CIOs are worried that competitors will **"eat them for lunch"** if they don't move quickly on Al.

# **71%**

of organizations rely on **manually mapping** – or do not map at all – to determine the impact of a new technology on existing processes and capabilities, and the potential benefits it will deliver.

# **53%**

Only 53% of emerging technology adoption projects in the past five years have **delivered measurable benefits** and impact.

### **89**%

of CIOs say it is difficult to maintain full visibility and control of risk across the IT portfolio and anticipate the impact of **evolving regulations** in emerging technology adoption projects.



of CIOs recognise the need to be able to **constantly alter course** to ensure success with emerging technology adoption projects.

### Emerging Promise: Al is Winning the Race for Investment

Companies investing millions in research and innovation, but success can be elusive





Organizations continue to invest in emerging technologies and new digital capabilities to accelerate innovation and build a competitive edge. To support this, they are carving out an **average of \$43.4 million** from their IT budgets each year for research and innovation projects.

Almost all CIOs (91%) agree that, if successful, such investments can put them at the *forefront of their market*.

However, given the experimental nature of emerging technology, it is perhaps unsurprising that the overwhelming majority (99%) of CIOs say the success rate of such projects tends to be lower than that for more established technologies.

An absence of an existing playbook, combined with a lack of skills and knowledge can hamper efforts. As a result, only half (53%) of emerging technology adoption projects in the past five years have **delivered measurable benefits** and impact.

### CIOs cite the **most common reasons** for this reduced success rate as:







Nearly two-thirds (64%) of CIOs say they've **been burned in the past** by investing in technologies that failed to deliver and made the business more

cautious about future investments.

As new technologies continue to emerge, organizations will have to carefully consider how they **balance upside and risk**, failing fast to come out in front and maintain support for future research and innovation projects.

### Al is leading the race for research and innovation

Looking at the areas where emerging technology investment is being focused, Al emerged as a clear winner. ClOs are all too aware that a failure to adopt Al technologies quickly could mean they **lose a crucial competitive advantage** that is difficult to recover.

CIOs are spreading their investments across multiple types of AI, with GenAI taking the lead, with a wide variety of use cases that they wish to pursue.





Two-thirds (66%) say their competitors will **"eat them for lunch"** if they don't move on AI quickly.

### CIOs **plan to invest** in the following AI technologies in the **next twelve months:**



	53%		
Machine learning	35%		
	88%		
<b>Custom-built AI solutions</b> (i.e., new applications built on open source technologies)			
	45%		
	43%		
	88%		
	47%		
Deep learning	40%		
	87%		
<b>Other types of Al</b> (e.g., semantic, causal, image classification, natural language processing)	44%		
	41%		
	85%		

### The most common areas organizations are investing in **AI to drive impact** include:



**Personalising services** and offerings by classifying people based on behaviour, socio-economic status or personal characteristics



Generating or editing content, such as text, images, audio and video to drive engagement with customers and other stakeholders



Managing **access to key services** - for example to reduce abuse or fraud



Improving the safety of products and services through automated quality testing

### **38%**

Management and operation of critical infrastructure

### 36%

Analysing text and video to enable proactive maintenance

### **32%**

Real-time and remote biometric identification systems, such as facial recognition

30%

Automating manual operational processes that have no impact on external stakeholders



Improving



Workforce

23%

Developing

20%

Assistance in legal

**18%** 

Reducing

the delivery of healthcare services, or	management	education and vocational training	interpretation and application of the law	workforce costs by reducing low- skilled work
the safety of individuals				

CIOs have several goals for such projects, with *improving customer experience* being the number one driver – while identifying areas for revenue growth and improved access to data and insights also rank highly.

Notably, future-proofing and competitive advantage ranked at the bottom of the list of drivers, suggesting the promise of what the technology can **deliver** *in the shorter-term* is of greater consequence to CIOs.

#### Key drivers behind adopting these AI technologies include:



77%





**74%** 



73% Improved sustainability



**73%** 

Improved access to data / insights



**72%** 

Reduced security risk



Faster time to market



70%

**68%** 

Greater efficiency / reduced costs Improved workforce safety

67% Improved regulatory compliance

66% It's a cool technology

63% Competitors are adopting it

61% Pressure from leadership / investors

46% Future-proofing

46% Competitive differentiation

### **Delivering AI-led innovation**

The variety of use cases for AI, coupled with the experimental nature of emerging technology research projects, increases the risk of failure if organizations don't have a clear execution strategy. Many could find themselves simply **'AI washing'** by developing solutions that add little value to their previous capabilities.



82% of CIOs say *it's easy to 'AI wash' solutions* by implementing new AI capabilities, but it's much more difficult to ensure those efforts translate to tangible business benefits. Organizations investing in custom-built AI solutions most commonly plan to build *in-house with their own technology teams* (39%). Another third (33%) of organizations will partner with a services provider or systems integrator to deliver their project, while over a quarter (28%) will work with an AI start-up vendor.

> Custom-built AI solutions require a greater investment of time and resources, which heightens the risk – but the **reward for building something unique** can be great. Success hinges on having a clear strategy for managing and tracking each project, whilst ensuring teams have the capacity to deliver and maintain the quality of their work throughout. This is inherently **more difficult with emerging technology**, as organizations find there are fewer people available with knowledge and skills needed to deliver the project.

CEO and co-founder Ardoq



# 2 Emerging Tech: No Reward Without Risk

### Understanding the risk of innovation

The transformative promise of emerging technologies must be balanced with the potential risks of investing in relatively untested use cases.

While CIOs accept that not every emerging technology project will deliver benefits, they are still **under pressure to minimize any risk** to business continuity or future innovation.

CIOs list the **biggest risks** of failed innovation projects as:





If they fail to plan for and manage these risks, organizations could find it more difficult to **justify future research and innovation projects**. The risk extends beyond short-term financial costs. Organizations also need to consider the potential for disruption to their existing operations that leads to damaged reputation, as well as the loss of market confidence that comes from delayed or failed innovation projects.

To navigate these risks, organizations need the **right people, processes, and tools** in place before emerging technologies are implemented. This will enable organizations to not only conduct impact analysis and due diligence upfront, but also helps to lay the **foundations for successful adoption** within the organization over the longer term.

**M. Hans Delly** Managing Director Slalom

# Flawed impact analysis could lead to flawed decision-making

Many organizations find it incredibly difficult to conduct impact analysis or forecast a return on investment (ROI) for emerging technologies upfront. In fact, 69% of CIOs say predicting the ROI on emerging technology is often a *'finger in the air'* exercise.

The **top five factors** that influence CIOs' decisions about which technologies and projects they invest in include:





# 61%

Concerningly, 61% of CIOs say FOMO (Fear Of Missing Out) is one of the main reasons they invest in emerging technology.

### Evaluating the impact of emerging technologies

On average, CIOs assess three different types of insights, data, and information to evaluate the likely impact of an emerging technology before they invest in a research and innovation project.

The most **common sources of insight** CIOs evaluate are:



As CIOs evaluate an emerging technology, it's critical to ensure any *investments support the organization's business objectives.* Time is of the essence, but it's also important to ensure safe adoption processes - especially when exploring high risk technologies such as AI.

To address this, CIOs need to work hand in hand with business leaders to ensure they are working toward shared goals, with a clear understanding of risk. Strong alignment between IT and business leaders is key to **minimizing risk, while maximizing the speed** and success of research and innovation projects.



74% of CIOs say it sometimes takes so long to gather the input of everyone who should have a say on emerging technology adoption that they're **late out of the starting blocks**.

**67**%

67% of CIOs say by the time they've made a call on adopting an emerging technology, it's often **no longer emerging** and they have lost the competitive edge.

### Forecasting the benefits of investment

The experimental nature of research projects means that it's usually impossible to obtain a clear picture of how an emerging technology will impact an organization before investments are made. As such, CIOs need to be prepared to embark with **some element of risk** and questions still to answer.



79%

of CIOs say businesses today have to take risks on emerging technologies or they will **go the way of the dinosaurs**.



of CIOs say the need to act quickly means they invest in emerging technologies **before establishing a business case** for the technology.



of CIOs say the rate at which new technologies are emerging makes it difficult to know **which horse to back** and which is going to fall at the first hurdle.

This report shows that there is **no standard approach** for forecasting the impact of an emerging technology. More than a third (36%) of organizations manually map where a technology will fit alongside their existing processes and capabilities to identify potential benefits and teams to involve. 29% have a tool or platform that can automate this process for them, and around a quarter (24%) rely on market research or modelling to aid decision-making.

However they evaluate an emerging technology project, it is often difficult to identify the *impact it will have on existing processes*, leaving organizations exposed to unexpected risks. CIOs urgently need to address this, with a mechanism that enables them to connect the dots between an emerging technology initiative and its impact on the current and future state of the organization.



## CIOs cite the **challenges of planning and delivering** emerging technology adoption projects as:

91%	Navigating change within the confines of established IT standards and frameworks
90%	Time it takes to gather the evidence needed to secure budget and support from business leaders
90%	Seeing far enough ahead to fully understand the future impact of new technology investments
<b>89%</b>	Maintaining full visibility and control of risk across the IT portfolio and anticipate the impact of evolving regulations
<b>89%</b>	Difficulty in prioritizing which projects should be pursued, by balancing time to market against expected ROI
<b>89%</b>	Visualizing where the technology will create an impact and therefore understand the level of investment needed to support it
<b>87%</b>	Understanding whether projects can be delivered on time and within budget with available resources
86%	Driving collaboration and IT transparency between technology, enterprise architecture, and business teams

### You need to play the long game to reap the rewards

The continuous need to pivot during emerging technology research projects means that it can **often be years** before organizations realize any benefits. However, CIOs widely accept this.

Only 32% of organizations look for a tangible ROI from an emerging technology adoption project **within the first 12 months**. Just over a quarter (26%) of CIOs expect to see an ROI within five to ten years.

### CIOs say the **biggest challenges they encounter** during emerging technology adoption projects include:



**Experimentation is essential** to the success of emerging technology research. There's unlikely to be a clear ROI at the beginning of a project, but over time, organizations need to be able to assess the impact and continuously pivot to get closer to delivering tangible benefits. It's not possible to do that with manual spreadsheets and disparate solutions. **Organizations need a central hub** that pulls all their information together in one place.

**Erik Bakstad** CEO and co-founder Ardoq

### Approaches to Managing and Delivering Innovation

#### Preparing for success in research and innovation

To maximize the success of their emerging technology research projects, it's important that organizations have **established teams** and processes to support and deliver them.

One-third (33%) of organizations have a dedicated team for managing innovation. The majority (46%) have a cross-functional team, while 21% establish teams and processes as needed.

Most organizations (66%) say *IT teams are primarily responsible* for innovation management and new technology adoption projects, 19% have an enterprise architect take the lead, and 15% grant product owners the responsibility.

The most common methods organizations use to *support emerging technology research* and innovation projects include:



A **dedicated executive** to sponsor innovation (i.e., Chief Digital Officer)



**Partnerships** with external companies such as disruptor start-ups



**Dedicated events** for teams to pitch innovation ideas to executives



other business

units

A dedicated Dec team to roll-out c innovations to exect

31%

Dedicated team capacity to execute innovation ideas 27%

Dedicated experimentation time for engineers to explore new technology 23%

Departments propose investments as part of regular portfolio management



Regular hackathons to help come up with ideas

### Managing and measuring the impact of innovation

Organizations use *multiple tools* to enable their teams to manage technology research and innovation projects.

Many of these tools weren't designed with emerging technology projects in mind, making it difficult for teams to access the insight and information they need to make the *right decisions at the right time*. A project management tool might be well suited to the operational aspect of the project, but will fall short on visualizing the impact of the new technology in the IT estate as a whole.

#### The most common tools and processes they rely on for innovation management include:







# 70%

of CIOs say they can't stay in the **driving seat of innovation** without a way of giving teams more autonomy whilst maintaining safe adoption practices.

Cutting projects that aren't business critical or growth enablers might be the right thing to do, even if the ideas they're based upon are great. As a result, freeing up time and saving money can empower the organization to onboard new projects faster and leverage emerging technologies and their possibilities **before its competitors do**.

Organizations therefore need to constantly evaluate the impact of an emerging technology throughout their research projects, so they can improve their **understanding of the business case** and pivot faster, to drive a higher rate of success.





00%

of CIOs say the speed at which the market, technology, and regulation changes means they **have to constantly pivot** emerging technology adoption projects as they learn new things. More than two-thirds (68%) of CIOs say if they didn't **constantly alter course** during an emerging technology adoption project, it's unlikely any of their initiatives would ever succeed.

Research published by The Institute of Engineering and Technology (IET) has reinforced the importance of this, showing <u>that</u> organizations that implement **benefits management processes** during project execution realize substantially better benefits.

Organizations rely on **several key ways t**o evaluate the benefit of an emerging technology adoption project as it progresses.

These approaches are difficult to operationalize using the collaboration and project management tools that many organizations rely on to support innovation.

#### The most common approaches include:



#### Enterprise architecture isn't being used effectively



Modern Enterprise Architecture (EA) is a discipline that enables business execution in a **continuous and reliable way**. It is a data-driven, dynamic and democratized approach to designing and managing an organization's people, processes, information and technology to align with business goals and enhance efficiency, agility, transparency and innovation.

A modern EA function is central to using emerging technology research and innovation projects to advance an organization's overall business strategy. This provides the data, insights, and information that organizations need to fully understand the risks, costs, impacts, and outcomes of adopting an emerging technology, so they can **drive stronger value** from their investments.

However, just 11% of CIOs say they have a mature enterprise architecture supported by a continuous effort to drive improvement at all levels of the business. A little more promisingly, more than a third (36%) say enterprise architecture is **central to the business** and informs all technology investments, with regularly updated documents and processes.

Despite this, 33% of CIOs say their enterprise architecture function relies on time-consuming processes that delay innovation and leave them blind to the impact of change.

Organizations are struggling to evolve with the rapid pace of technology change. This presents opportunities for them to think strategically about their future by leading with an architecture mindset and employing *modern architecture as a business* **discipline** to ensure the integrity of their enterprise solutions.

M. Hans Delly Managing Director Slalom

#### The unique burden of Al

Before embarking on an emerging technology research project, it's crucial that as much as possible, organizations *mitigate any unique risks* relating to that technology. Each technology and use case carries its own specific risk, so organizations need to identify and factor these risks into their execution strategy. The current focus on investments in AI stands as the perfect case in point.

Many of the most common AI use cases that organizations are exploring (see 'AI is leading the race for research and innovation' in Part 1), such as service personalization, influence external-facing services and come with **ethical** considerations and potential for regulatory scrutiny. If organizations are using AI to customize their offerings or determine who gets access to services based on customer data, they need to be confident their technology is making the right decisions, is free from bias, and doesn't infringe on consumer rights. This adds to the risk significantly, due to the potential to damage customer trust or lead to regulatory non-compliance.



of CIOs say AI comes with a **greater weight of responsibility** than other technologies because of its huge potential impact.



of CIOs say **AI is the most high-risk technology** that they've ever invested in and if anything goes wrong, that burden will be on their shoulders.





of CIOs say the **potential pitfalls** of AI are huge, so they are proceeding with great caution.

### Charting a course through evolving regulations



# **69%**

More than two-thirds (69%) of CIOs say it's **a nightmare navigating emerging technology** adoption projects through the regulatory compliance minefield. Al is causing particular headaches due to the uncertainty surrounding the impact of regulations that are still being developed.

The absence of a mature EA function is amplifying this challenge for many organizations. Nearly three-quarters (74%) don't have an enterprise architecture that provides a **full and accurate picture** of how AI adoption will impact their ability to comply with regulations such as the forthcoming EU AI Act.

Many (51%) of these organizations are in the process of building an enterprise architecture to achieve the visibility they need, but they are finding it difficult to move fast enough. As a result, nearly half (49%) of CIOs fear there is a risk their **company could run into trouble** when the EU AI Act or equivalent legislation comes into force.

# Conclusion

Organizations are in a race against time to tap into the enormous potential of emerging technologies, such as AI, investing in untested solutions to maintain a competitive edge.

However, while agility and speed to market are key to success, organizations would see greater benefits from emerging technology projects – and fewer risks – by improving their control using up-to-date data and insights. A **mature enterprise architecture function** is an important part of the solution, providing visibility into current IT infrastructure and helping teams to forecast and track the value delivered by new investments.

With the current focus on AI research, the key for most organizations will be to embed these technologies as an enterprise capability, rather than investing in one-off tools and solutions. Taking a 'finger in the air' approach is often the most pragmatic way to get these projects off the ground. However, organizations need to ensure they have **mechanisms to mitigate potential pitfalls**, learn from initial investments, and maximize the ROI of their AI initiatives.

#### Keys to success

This report highlights three key considerations that will help organizations frame their strategy and maximize the success of future emerging technology

research projects:





**Balancing risk and innovation:** IT leaders are concerned about how best to implement AI. They want these technologies to add real value to their people, platforms, and products, while adhering to impending regulatory frameworks. IT leaders need access to the information, data, and insights that enable them to balance the risks associated with AI, or any emerging technology, against their desire to drive value for the business.



**Taking a long-term view:** Investments are being made with an eye to the future, as IT leaders don't expect to realize the full value of AI for five to ten years. In the meantime, they need to establish and continually build on a structure that will enable them to absorb AI into the organization. IT leaders need a way to record the insights and data gathered during their experiments so they can identify when it's time to press the accelerator and transition from exploration to production. This is crucial to maximizing the benefit of AI, by transforming it from an emerging technology into an enterprise capability.



#### Maturing enterprise architecture into a business discipline:

EA functions are typically bogged down with manual processes, focus on standards enforcement, or have become an ivory tower that is detached from the needs of the business. IT leaders need to evolve their EA into a business discipline that provides insights to drive investment in emerging technologies, shepherd an emerging technology into an enterprise capability, and ensure the integrity of existing enterprise solutions.

#### Five key criteria to *successfully manage your AI innovation* with a mature EA function



React quickly by continuously tracking the progress of innovation projects



Make available the information, data, and insights to continuously weigh benefits against costs and risks



Accelerate impact analysis, reduce delivery costs, and drive faster time to market



Continuously show impact on the rest of the enterprise's solutions



Automate the entire innovation management process from commonplace manual spreadsheet and documentation activities

Ultimately, by establishing an enterprise architecture function that delivers these five key criteria, CIOs can make more informed decisions and ensure their investments in emerging technologies are aligned with business outcomes – from growing revenue to reducing risk or lowering costs.



Ardoq is a dynamic, data-driven Enterprise Architecture platform that empowers organizations to navigate change effectively. Recognized as a global leader in the market, Ardoq fuels clear strategic planning, sustainable revenue growth, and repeatable transformation success. Ardoq is a trusted partner for digitally forward organizations seeking to unlock new value and achieve operational excellence.

### **About Slalom**

Slalom is a next-generation professional services company creating value at the intersection of business, technology, and humanity. With a fiercely human approach, they deeply understand their customers—and their customers—to deliver practical, end-to-end solutions that drive meaningful impact. Backed by over 700 technology partners, the nearly 12,000 team members in eight countries and 49 offices help people and organizations dream bigger, move faster, and build better tomorrows for all.

