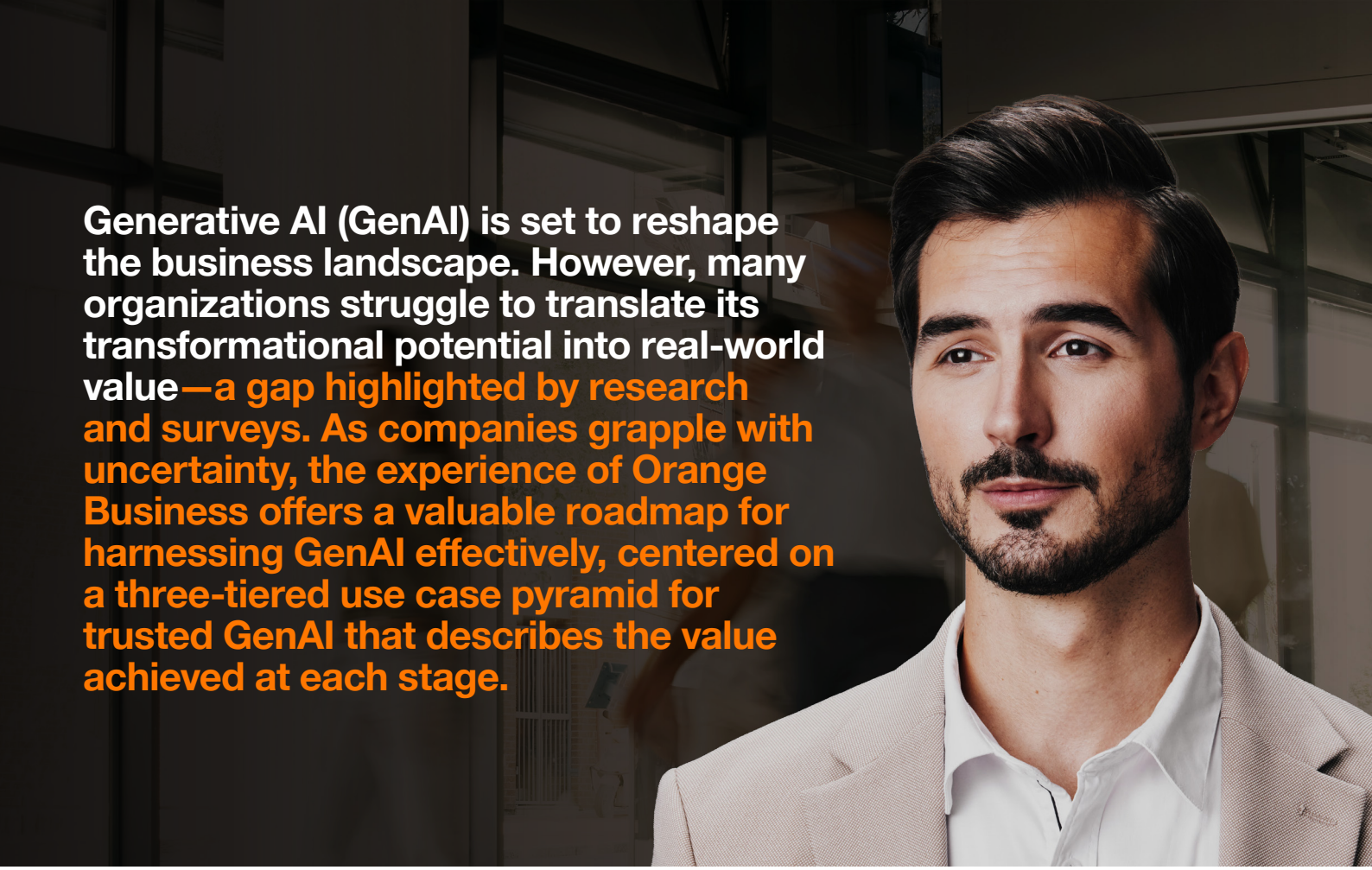
A Blueprint for Value.
From employee satisfaction to transformational use of GenAI and all that's in between.

Jacob's CEO is disappointed at GenAI's lack of productivity gains. Jacob knows employee satisfaction is a better measure of ROI, and there's a lot more to gain than productivity.

orange™ Business

Artificial Intelligence.
Real Wisdom.



Generative AI (GenAI) is set to reshape the business landscape. However, many organizations struggle to translate its transformational potential into real-world value—a gap highlighted by research and surveys. As companies grapple with uncertainty, the experience of Orange Business offers a valuable roadmap for harnessing GenAI effectively, centered on a three-tiered use case pyramid for trusted GenAI that describes the value achieved at each stage.

Introduction

GenAI is a technology most believe will have as much impact on our lives as the Internet and the mobile phone. Yet, it seems the path to the bright future it promises is paved with disappointment.

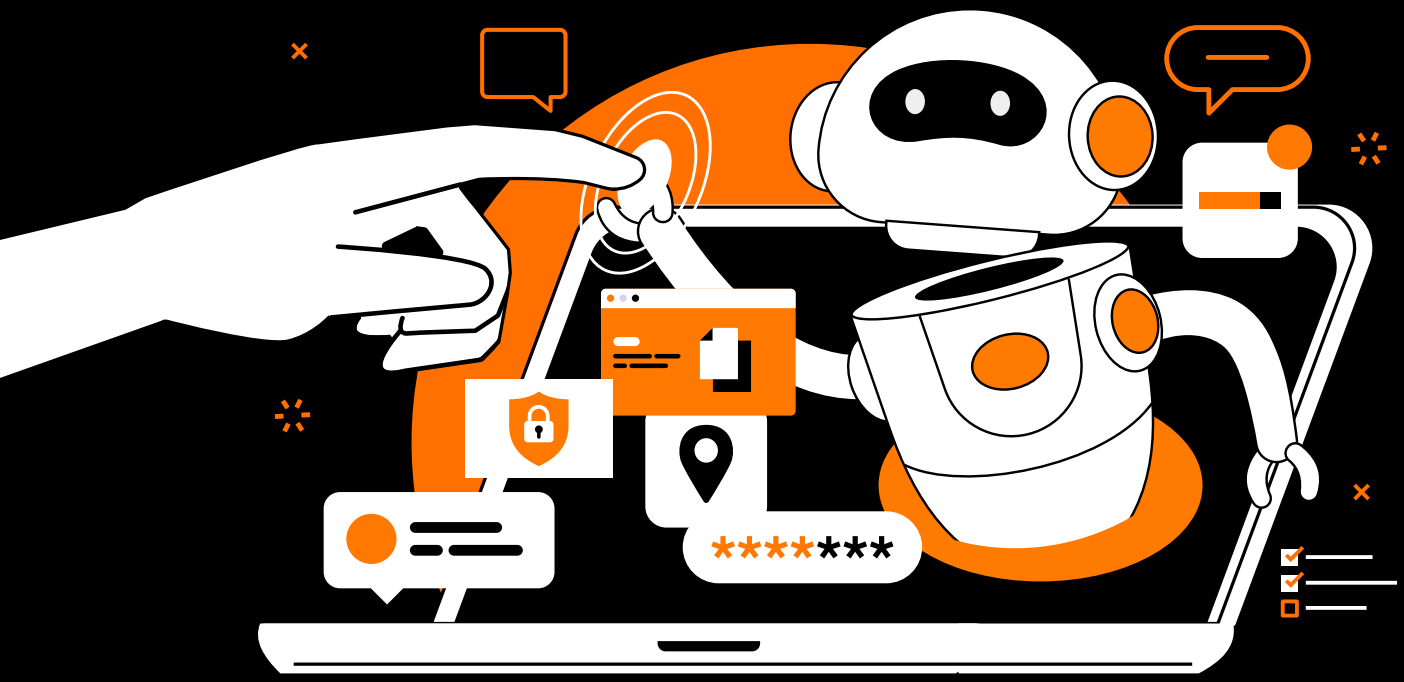
The data provider S&P Global recently found that the share of companies abandoning most of their generative-AI pilot projects has risen to 42%, up from 17% in 2024[1]. And, further still, a recent MIT study found that, despite $30–40 billion in enterprise investment, 95% of organizations remain stuck with no measurable P&L impact[2]. It's becoming clear that a colossal gap is emerging between the transformational potential of GenAI and organizations' ability to realize this value.

No option to opt out

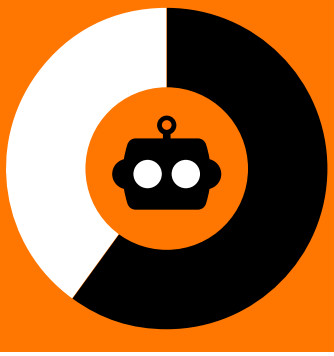
Against this backdrop, it is perhaps no surprise that recent research conducted in the Financial Times stated that, "companies are a lot clearer about the potential problems with AI than the upsides[3]". However, ignoring the technology altogether is not the answer either.

GenAI is a technology that employees are determined to use – whether corporately sanctioned tools are available to them or not. In terms of shadow AI, A McKinsey study found that three times as many users were using AI for a third or more of their work as their employers realized. A BCG report found that 54% of employees would use AI tools even if these were not authorized by the company. This activity increases the likelihood of exposure to the very risks that its prohibition is specifically designed to prevent.

Conversely, the provision of secure, enterprise-sanctioned GenAI tools enables a high degree of integration with existing applications and workflows. A McKinsey survey found that 45% of employees agreed that this would make them more likely to increase day-to-day usage of GenAI tools, and it would disincentivize the 'cutting and pasting' of prompts and results into shadow AI services. Also, visibility makes effective monitoring and management of GenAI-based activities possible and enables the sharing of prompts and AI agents, which enhances time savings.



No trust, no value



Deloitte's recent State of Generative AI report reveals that only 11% of organisations that have introduced AI tools have successfully embedded these technologies into day-to-day workflows, (success being defined as over 60% of employees using it daily).

In companies where fewer than 20% of employees use GenAI each day, almost half report disappointing returns on their GenAI investments. By contrast, organisations with high levels of daily usage are seeing clear benefits—86% of these report that they have met or exceeded their expected return on investment[4].

In the wake of this research, the Harvard Business Review asked, **"So why aren't employees at some organizations embracing GenAI?"** They concluded – and we wholeheartedly concur – that the answer **"boils down to a lack of trust"**. As McKinsey noted recently, **"Trust… is the foundation for adoption of AI-powered products and services. After all, if customers or employees lack trust in the outputs of AI systems, they won't use them.[5]"**

So, without trust, there is no adoption. Without adoption, there is no value. Fundamentally, embedding trust at the heart of your AI strategy isn't only the right thing to do – we at Orange Business were among the first to acknowledge that the power of GenAI was such that there was an ethical responsibility to ensure it was used responsibly – but also the smart thing to do.

Orange Business is therefore committed to the development and deployment of ethical and responsible artificial intelligence and data systems. This vision permeates every project, whether in research, the working environments of our employees, or the quality of services and experiences offered to our clients. And building trust is where we start every conversation about the use of GenAI that we have with our customers.

A guiding light

When we discuss GenAI with our customers, it is clear that many of them can feel lost. And the technology industry itself must carry much of the blame for this. There is a constant barrage of claims and counterclaims from GenAI vendors, each promising that their solutions are a panacea for the challenges customers face. And a dearth of practical advice about how to deploy these solutions in a way that will create the value that organizations crave.

That's why our customers are eager to hear about Orange Business's approach to GenAI implementation. In 2023, we created our own internal GenAI tool – and opened it up to the entire company. This bold experiment in democratizing access to GenAI has proven to be a great success. Fast forward two years, and we have between 12,000 and 15,000 daily users and between 44,000 and 48,000 monthly users. This has resulted in the creation of more than 20,000 personal AI agents, of which around 300 have been industrialized by central resources to become 'official' AI agents. In addition, our frontline employees are creating multiple AI agents for use by, for example, field engineers. Already, 50,000 Orange Business employees are fully trained to use the technology.

The accumulated wisdom amassed through this initiative has allowed us to create a blueprint for delivering value from GenAI in the workplace, one that rests on a three-tier use case pyramid.

Tier three – The transformational level:
here, we see the key processes of the company being transformed with a direct, measurable impact on reputation and revenues.

Tier two – The productivity level:
here, workers can really embed GenAI into their core tasks, the ones that drive their recognition and often their compensation. This comes through a bolder use of GenAI with more complex data.

Tier one – The foundational level:
is the assistance that GenAI can provide to human beings in completing the individual generic tasks described above. Measurable ROI at this level comes not through productivity but through enhanced employee satisfaction.

The unique nature of this model lies in its recognition that each tier in the pyramid generates a different type of value: starting with employee satisfaction, moving to increased productivity, and finally reaching transformational change. The model also emphasizes that AI capabilities and the value they deliver must evolve in sequence—each tier builds on the previous one.

1

The Foundational Layer: governance and discovery

At the base of the pyramid lies the essential groundwork for any GenAI initiative—a secure, easily accessible GenAI space delivering functionality at least on a par with other industry offerings. All this, with a charter for AI use, has created an environment where employees could innovate responsibly and confidently.

This top-down commitment formed the bedrock for all subsequent AI efforts, ensuring that innovation is both responsible and scalable. It was complemented by a democratized approach to GenAI use case discovery: rather than limiting access to a select few, all employees were empowered to experiment and identify where AI could add value.

As in any company, the adoption of new technologies such as artificial intelligence within Orange Business is often prompted by strategic needs or regulatory requirements. Success hinges not only on compliance but also on robust collective organization, with dedicated developers and IT specialists to tailor algorithms and create essential databases. For AI to deliver value, organizations must actively adapt tools and refine established workflows, encouraging collaboration across departments and prioritizing input from employees.

While workshops, promotional activities, and training courses are important, they alone do not guarantee lasting change. True transformation occurs when solutions are customized to suit local business operations and embedded within day-to-day tasks. This is an ongoing, collaborative journey, marked by continual refinement of technology and organizational practices, where employee engagement is fundamental to achieving meaningful results.

This broad outreach has uncovered a wealth of use cases, as those employees closest to business processes are the ones best positioned to spot opportunities for improvement. The most popular use cases related to: code development; finding data and documents from around the company; managing routine activities such as meeting minutes; HR tasks such as creating job offers; data and analytics; and intelligent assistants for our contact center workers.

By carefully monitoring this activity, we could identify and industrialize the services that proved most useful, which were then promoted to the entire user base. You can read more about this approach in the companion thought leadership piece to this article, "**The Adoption Advantage: Why GenAI's True Value Lies in Everyone's Hands**".

Tales from the frontline: Hélène (Facilitator, Managerial Development, Human Resources - Orange France)

"I used GenAI to co-create a full-day training session with a dragon theme—in just a few hours! I worked with Live Intelligence to come up with five unique dragon characters, each reflecting a different facilitator style. Together, we created character descriptions, figurines, card games, and even a personality quiz. It's a complete, innovative activity that always gets great feedback, and I reuse it regularly. Without AI's help, this project would've easily taken two weeks, or I'd have had to hire an outside provider, so it saved me a lot of time and money. Plus, it gave me access to skills like psychological profiling, which I don't have, and really ramped up my creativity."

2

The Productivity Layer: from assistance to autonomy

The second tier of the pyramid entails GenAI systems taking autonomous actions within set guardrails and sees a shift from simple productivity gains to more profound business impacts. In this layer, organizations can reliably automate routine tasks in many areas – in the case of Orange Business, these are likely to be in customer support, infrastructure development, and office productivity applications – freeing up employees to focus on higher-value work.

At this point, the role of human beings changes: previously, they were 'in the loop' – responsible for carrying out these lower-value tasks; here, they become 'on the loop' – managing and authorizing activities largely carried out on their behalf by agents.

When, in some cases, humans don't provide oversight, trust in GenAI must be unwavering - especially when immediate, accurate answers are vital – for example, when customers are seeking guidance on troubleshooting newly purchased products. At Orange Business, we recognize that these scenarios demand robust solutions and are actively developing innovations such as AI systems that cross-check each other's outputs and exploring the benefits of fine-tuning Small Language Models to enhance reliability.

Equally, protecting data to the highest standards is non-negotiable. The stakes are high, with sensitive personal, financial, and technical information frequently at play. To address this, we have built and operate our own highly secure infrastructure, equipped with proprietary GPUs in a secure cloud to run the most sensitive use cases—resources we also extend to our customers.

In this environment of rigorous trust and security, innovation flourishes, and at Orange Business, our focus is now moving to this productivity layer. According to Usman Javaid, Orange Business's Global Chief Product and Marketing Officer, "The real value of Agentic AI is to reinvent business processes with an AI-first mindset". At Orange Business, we are implementing this approach by, for example, empowering field engineers with advanced applications that finalize service tickets using a legally binding, photo-based verification, accompanied by a detailed written record of their intervention and its outcome. This not only drives accountability but also sets a new standard for excellence and transparency in customer service.

But to get there, employees need to first trust GenAI, understand what it's good at, and how to use it. It's not just about prompting: it's about understanding where it will bring time savings, reduced errors, or increased quality or creativity in what we do. It's also about learning to be patient with prompting and learning that you can rarely use GenAI outputs as they are – they will require some modification.

As an example, our social media managers say that they don't just let Live Intelligence write their posts. They take the time to prompt correctly (for things like key messages, tone, length, and target audience), and they always amend – sometimes heavily – what Live Intelligence comes back with. But it makes the whole process twice as fast. For them, it's a very important mechanism for improving their productivity. Of course, this does not mean that Orange is going to post twice as much on social media. But there is a lot more to a social media manager's job than writing posts, so creating efficiencies in this area means that they can focus on more complex tasks, such as refining social media strategy or trying out innovative means of communication.

The ultimate goal is to "10x" people's capacity; if agents are carrying out the bulk of the tasks entailed in any workflow, then employees will have to embrace a 'CEO mindset', focusing less on day-to-day activities and more on the outcomes that they wish to deliver for their organizations, their customers, and their shareholders.

Walking before you run – an iterative approach to use case development

Understandably, customers wishing to chase the productivity gains promised by Agentic AI are rushing to embrace the technology without ensuring widespread adoption of 'garden variety' GenAI within their organizations. However, our experience suggests that making the investments necessary to embed an internal AI culture is where value creation truly begins.

As we've seen, this exercise generates time savings and enhances employee satisfaction. But it also serves as the foundation of the use case pyramid, creating a platform on which more sophisticated GenAI services can be built – and delivering the productivity savings organizations yearn for.

We are not alone in thinking this: As McKinsey noted, "Organizations that have already built up their capabilities in deploying GenAI tend to see better returns on their GenAI investments over both the short and longer term. Building this sort of maturity in GenAI transformation is essential… lessons from lower-risk, earlier applications of GenAI build critical capabilities that help later higher-risk (and higher-reward) applications succeed[6]."

3

The Transformational Layer: redefining value

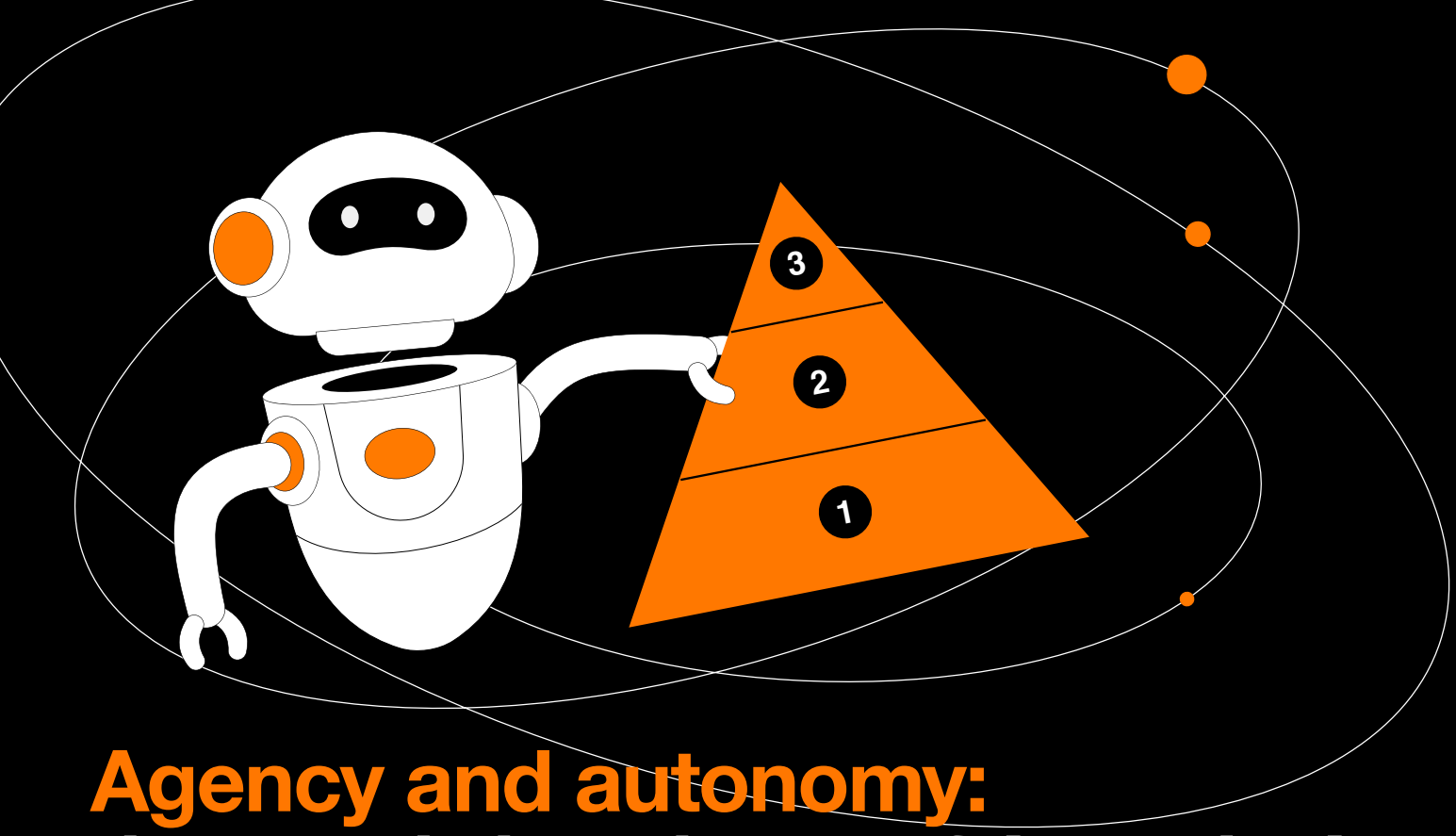
At the top of the pyramid lies the transformational layer, where GenAI enables dramatic new ways of delivering value. This layer is about the critical use cases that enable both business optimization and transformation.

It's likely that the technology will be applied to very process-heavy and mission-critical workflows that put a premium on the various dimensions of trust: reliability – there is no place for hallucinations here; data security – it's almost certain that confidential customer data will be in play; and integration – GenAI cannot be consumed as a standalone tool but must be embedded into line-of-business applications. While a lot of work has been done on Trusted AI – and Orange Business is in the vanguard of these efforts – we are some way from being able to rely on GenAI to this extent.

Looking further forward, we are reminded of the famous quote by Henry Ford – considered by many to be the father of automation – who observed, "If I had asked people what they wanted, they would have said faster horses".

Although the provenance of this quote is dubious, the wisdom is not. A car is not an evolution of a horse, but a profound break with the way humans moved around the planet. In the same way, the transformational GenAI use cases of the future are likely to involve disruptions to what we recognize today as 'business as usual'.

For example, Y Combinator, the venture capital firm behind companies like Airbnb and Dropbox, recently claimed that a quarter of its latest cohort of investments used GenAI to write 95% of their code. This commoditizes technical excellence and puts a premium on human ingenuity and customer insights: it's a powerful indicator of how GenAI can rewrite the rule books of innovation.



Agency and autonomy: the multi-tiered role of Agentic AI

Unlike traditional GenAI, which is focused on assisting employees with individual tasks, Agentic AI delivers greater value by working across entire workflows, executing tasks and making decisions largely autonomously and with minimum involvement from human beings. There is a distinction between AI agents, which automate individual tasks at the foundational layer, and Agentic AI, which automates entire workflows in the productivity layer. These two terms are often, and mistakenly, used interchangeably.

Today, there is a huge focus on Agentic AI. For example, a new survey has revealed that 51% of companies have deployed AI agents, with another 35% planning to do so within the next two years[7]. And a recent Salesforce[1] study found that 86% of Chief HR Officers said integrating digital labor alongside their existing workforce will be a critical part of their job, and they projected a 327% growth in agent adoption within their organizations by 2027. Once Agentic AI is fully implemented, CHROs expect an average employee productivity gain of 30% and a 19% reduction in labor costs.

Ultimately, while Orange Business sees Agentic AI as present in all three tiers of the use case pyramid, it is the middle productivity layer where it will, certainly in the short term, deliver the most value. At the productivity layer, the ability of Agentic AI to synchronize entire workflows is the surest way of delivering the 10x productivity gains that are so heavily promoted and so eagerly sought. Looking further out at the transformational layer, it's likely that orchestration of sophisticated Agentic AI systems on an enterprise-wide basis will lead to entirely new modes of operation for those companies able to harness their potential.

However, there is some way to go before the agentic future is created. Technical resources will have to be made available to front-line workers so they are able to create agents for the use cases they identify as valuable. And already, we are seeing some problems with scaling Agentic AI: the greater the number of agents that need to be synchronized, the more complexity this creates. And, it is much easier to apply agents to a single workflow than to do so across different workflows.

Management of connectors is also emerging as a major hurdle for agentic AI. Because Agentic AI systems often require broad access to data and tools, the connectors create significant data risks due to expanded attack surfaces and the potential for unintended data exposure. This creates new entry points for bad actors and new challenges for data security, governance, and accountability.

A knowledge gap

There is an evident gap between leadership ambitions for Agentic AI and employees' understanding of these tools.

For example, a BCG study found that GenAI agents are deeply integrated into the daily workflows of just 13% of employees and that only one-third of employees understand how these sophisticated tools function. However, the analyst group noted that, "When workers are well-informed and familiar with AI agents, apprehension turns into enthusiasm. Employees begin viewing AI agents less as threats and more as collaborative partners that enhance their work."

The BCG study observed a huge difference in attitude to AI agents between, on the one hand, employees who had heard about AI agents but were unsure of what they actually were, and on the other, those who did understand AI agents well and could explain how they work. When asked if AI agents were a valuable tool that could support and collaborate with human workers, only 25% of those unfamiliar with the tools agreed, compared with 71% of their more informed colleagues. When asked if these same tools posed a potential threat to certain jobs or responsibilities, 16% of the first group agreed, compared to only 2% of the second.

So, familiarity with GenAI tools at the foundational stage lowers resistance to the introduction of more advanced tools while increasing the skills of those asked to use them. This foundational capability is therefore a necessary precursor to the successful adoption of sophisticated agentic tools, and organizations that bypass this stage often encounter resistance and poor utilization rates: ultimately, this may be one of the major reasons why so many organizations have so far failed to realize any value from their AI investments.

Tales from the frontline: Anne (Agile Transformation Coach – Orange France)

> **"Our experience has demystified AI and shown us that it's just a tool – although a very effective one – that we can use responsibly to help us in our everyday working lives. It doesn't replace you – it is a virtual coach that makes you think and challenges you. Use it as a 'sparring partner' for specific tasks where you know it can add real value, but don't take every result at face value"**

Conclusion:
The Strategic Advantage of the Orange Business approach

The three-tiered Use Case Pyramid developed by Orange Business provides a clear, actionable blueprint for organizations seeking to unlock the full potential of GenAI. What sets this model apart is its recognition of two key principles: firstly, that trust is a foundational capability that must be built into governance structures from the very start; and secondly, that value is not only achieved at the upper echelons—where business impact is most dramatic—but is built from the ground up, with each layer supporting the next.

The bottom tier has delivered generic applications that are typically saving our employees two hours every week, and which have had a measurable impact on employee satisfaction. Crucially, it has also laid the foundations for the introduction of more sophisticated iterations of GenAI. By contrast, many organizations fixate on the flashier tier, chasing ROI from productivity applications while neglecting the foundational groundwork necessary for widespread adoption and sustainable value.

Our experience suggests that this is an oversight that may well account for the inability of most organizations' GenAI investments to deliver value. Instead, by investing first in foundational adoption—automation of day-to-day tasks, comprehensive training, and a culture of innovation—we believe businesses can lay the groundwork for sustainable productivity gains and, ultimately, mission-critical transformation.

Sources

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