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In partnership with

LTIMindtree

MARKET IMPACT REPORT

Enterprises must embrace AI to reimagine their future, not tinker in the margins

Authors:

HFS Research

Rohan Kulkarni, Executive Research Leader
Suhas A R, Associate Practice Leader
Ashwin Venkatesan, Executive Research Leader

LTIMindtree

Archana Joshi, Head of Strategy, BlueVerse AI Services
Sakthivel Sabanayagam, Head of BlueVerse Platforms
Deepak Khosla, VP, GTM & Customer Success for BlueVerse AI

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Executive summary

"Every act of creation is first an act of destruction."

— Pablo Picasso

Central to the evolution of society is the concept of creative destruction. It is the process where innovations replace and render obsolete older ones, thus creating new economic paradigms. This has been true across history, from hunter-gatherers to people navigating the shifts brought by agriculture, the industrial revolution, the advent of the internet, and now the artificial intelligence (AI) era.

We now stand at a fresh inflection point, arguably the most disruptive since the dawn of the internet—with AI poised to reshape how enterprises operate, make decisions, and deliver value. It is becoming the ultimate disruptor, capable of amplifying human abilities and accelerating business outcomes through real-time insights, dynamic personalized experiences, and autonomous decision-making. This inflection point offers enterprises an unprecedented opportunity to reimagine the value they deliver for customers and stakeholders alike.

Yet, despite the enormous potential, 83% of enterprises (part of this study's survey) remain in the early stages of adopting AI, iterating in the margins. Initiatives often stall at the experimentation phase as organizations grapple with scaling challenges, unclear strategies, and a lack of ecosystem readiness. In fact, for one in two enterprises, many AI solutions remain at the experimentation stage (POC, pilot) and fail to scale. Although operational efficiency is widely cited as AI's primary role, productivity gains will soon become table stakes rather than a differentiator. Recognizing this, enterprises are turning to their ecosystems to drive deeper, more strategic value—75% of them expressed openness to working with new, specialized, or non-traditional AI partners. This shift signals the transition from labor-intensive service models to intelligent, scalable, outcome-driven orchestrators of value.

> "We use AI in the underwriting space, and we moved from months and weeks of analysis work to actually hours and minutes."
>
> — CIO at an international bank

HFS Research, in partnership with LTIMindtree, has studied the potential of AI for enterprises and its purpose, impacts, and manifestations. More than 500 business and technology leaders across five industries, including banking, insurance, manufacturing, retail, and media were interviewed for this study.

The key insights gathered reflect how enterprises are getting prepared for the age of AI.

1. **Purpose:** The jury is out on AI: 53% of enterprises consider AI a driver of operational efficiency, while 51% see it as an enabler of business reimagination. A smaller set of respondents identify it as a strategic signaling tool, given that communicating an AI roadmap is 1.4x more likely to attract specialized talent. The purpose of AI is evolving for enterprises and will likely see further iterations before its long-term value becomes clear.

2 **Capabilities:** Enterprises are rethinking their organizational structures and value levers to realize AI's potential fully. Over half (51%) plan to elevate AI to the very top, creating new C-suite roles or even an AI-focused board committee. In comparison, another 44% expect to restructure the P&L and functional leadership to ensure AI ownership aligns with where revenue is generated. Rather than immediately pursuing market-facing differentiation, 62% of enterprises are prioritizing the build-out of foundational operational capabilities (for instance, MLOps to design, train, and iterate models at scale).

> "We are actually reaching a point of AI-first culture. Today, anything related to AI has an implication toward revenue."
>
> — A chief innovation officer at an international bank

3 **Go-to-market:** In a market clouded by AI-washing and limited innovation, nearly 50% of enterprises remain skeptical of the current supplier landscape. While concerns about vendor differentiation partly drive this skepticism, it is also compounded by internal challenges such as legacy buying behaviors that are ill-suited for fast-moving AI adoption. Still, 43% of respondents are actively exploring partnerships with innovative or niche AI specialists, preferring domain-centric providers that bring in contextual, industry-specific value rather than generic AI capabilities.

4 **Expectations:** ~50% of enterprises are struggling with debt (tech, talent), hindering their ability to embrace and fully maximize the potential of AI. This is reflected in ~20% continuing to buy AI in the same old way as IT has been purchased (T&M, consumption) and another 37% only partially adapting traditional IT buying for AI. On the flip side, ~50% are leaning into the narrative of outcome-based pricing but are yet to clearly define the outcomes they intend to track/measure.

1 PURPOSE

AI must create a fresh canvas for redefining enterprise impact

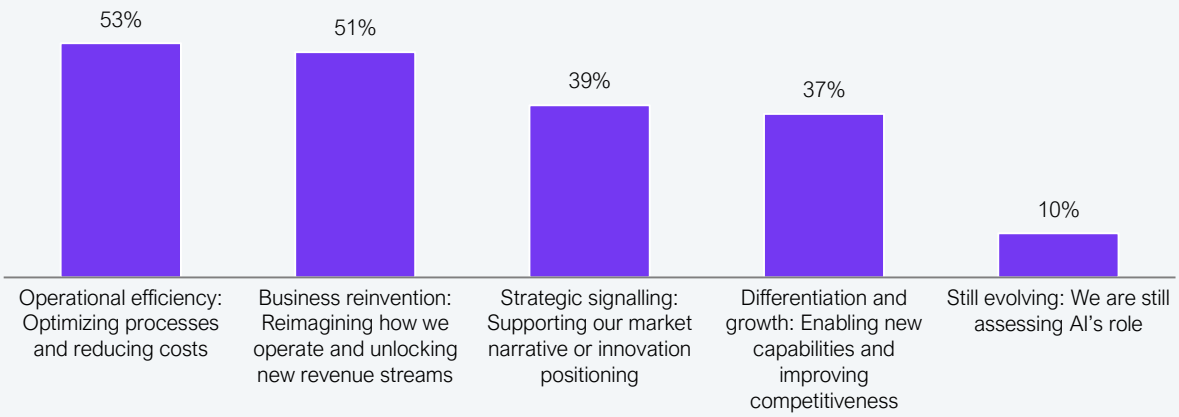
The future state will compel enterprises to reimagine the value they deliver

AI enables enterprises to fundamentally rethink their core purpose—move beyond traditional roles as mere providers of goods and services to become partners in delivering outcomes that really matter. Increasingly, businesses recognize AI's broader role in orchestrating richer customer and stakeholder experiences, enabling integrated ecosystems, and unlocking new sources of value. For example, a telecom provider can leverage AI to provide real-time, personalized service recommendations based on usage patterns. Alternatively, a logistics firm can partner with e-commerce and fintech players to create an AI-powered fulfillment and payment network, enabling better operational visibility and faster delivery times.

Delivering such outcomes at scale requires a shift in focus. Organizational priorities must move beyond operational efficiencies toward continuous innovation, new value creation, and incremental revenue streams (see Exhibit 1). For example, JPMorgan Chase introduced a generative AI tool called LLM Suite, designed to enhance employee productivity and support in its asset and wealth management division. This tool functions as a research analyst, providing information, solutions, and advice to users. Similarly, Bank of America's virtual financial assistant, Erica, surpassed 1.5 billion client interactions, offering personalized financial advice and assistance through its mobile banking app. On the retail front, Walmart utilizes AI to create personalized shopping experiences by offering tailored recommendations and promotions to individual customers, enhancing customer engagement and driving higher sales. Reflecting this shift, over half (51%) of enterprises today view AI primarily as a catalyst for reimagination, recognizing that failure to adapt means risking competitive disadvantage.

Exhibit 1: Enterprises are focusing on driving operational efficiency and business reinvention through AI

What primary role does AI currently play in your enterprise?



Sample: 504 enterprise leaders across Global 2000 enterprises
Source: HFS Research in partnership with LTIMindtree, 2025

Another compelling example is LTIMindtree's BlueVerse, an enterprise AI ecosystem that operationalizes AI at scale, enabling organizations turn reimagination into action. BlueVerse supports the full AI lifecycle, from design to deployment, through a combination of enterprise-grade platform, accelerators, solution kits, specialized AI services, and a marketplace of more than 300 industry-specific AI agents. It enables rapid integration into existing workflows across sectors such as finance, retail, and manufacturing. With a focus on modularity, interoperability via MCP-compliant protocols, and built-in responsible AI governance, BlueVerse is especially suited for enterprises operating in highly regulated environments. By embedding such AI platforms into business processes and customer engagement models, the enterprise narrative to shift from process automation to transformation can be realized.

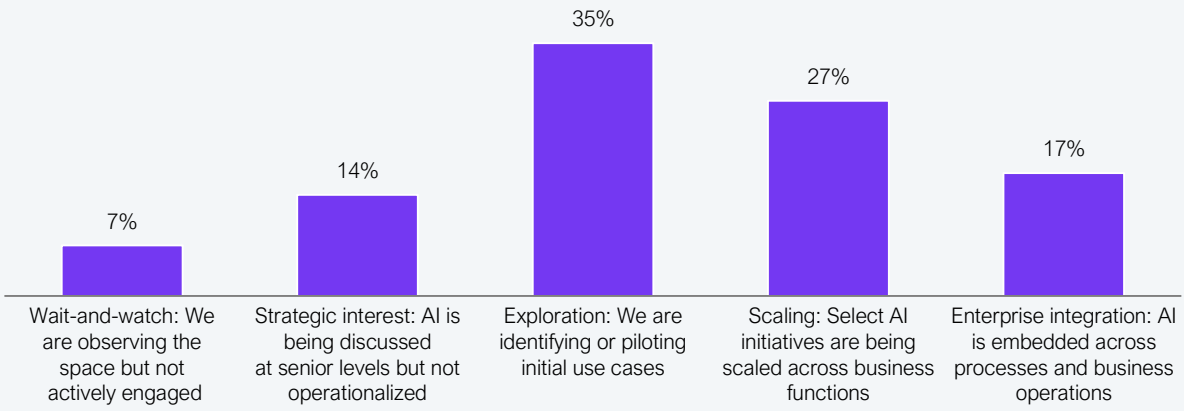
Enterprises must create a new construct to support their reimagined purpose—one that goes beyond words

Translating this ambitious vision into tangible outcomes requires enterprises to embed AI at the core of their operating model. Only 17% (see Exhibit 2) of organizations claim to have integrated it across their entire operations, highlighting a significant gap and immense potential for reinvention.

To close this gap, AI must become central to enterprise strategies—shaping their products and services through smart simulation of market conditions and responses and enabling AI-infused operations for real-time insights and decision-making. For instance, manufacturers can leverage predictive maintenance to prevent costly downtimes, while logistics firms can use real-time decision-making algorithms to optimize inventory and supply chain responsiveness. Companies such as Amazon and Netflix have exemplified successful reinvention by embedding AI into their core processes, driving personalization, operational efficiency, and proactive customer engagement at scale. Organizations must move beyond traditional structures to unlock similar impacts and fully commit to becoming agile, AI-powered enterprises. This transformation requires bold leadership and a clear top-down mandate to embed AI into the fabric of enterprise strategy and execution.

Exhibit 2: True AI enterprise integration across functions is still elusive for most enterprises

What best describes your organization's current stage of AI maturity?



Sample: 504 enterprise leaders across Global 2000 enterprises
Source: HFS Research in partnership with LTIMindtree, 2025

Enterprise success will be contingent upon its relevancy with customers, requiring continuous and consistent value enrichment

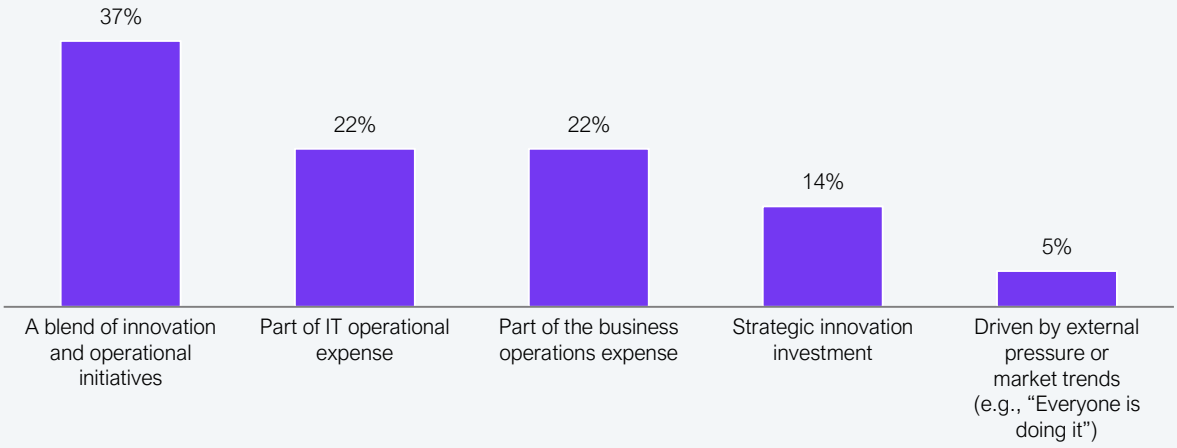
> "We don't look at AI as a technology. We look at AI in terms of what it can do for our business and around efficiencies, competitive differentiators, and ROI."
>
> — A senior executive at an international bank

As businesses evolve, so do customer, employee, and stakeholder expectations—necessitating deeper, purpose-led engagement. AI gives enterprises the right tools to meet these expectations by delivering highly personalized, contextualized experiences aligned with stakeholder values and priorities. Despite this potential, only 37% of enterprises leverage AI strategically, balancing operational efficiency (see Exhibit 3) with transformative business outcomes. In contrast, 44% still treat AI as purely an operational expense (either part of IT or business operations), limiting its strategic value.

There are notable exceptions. For instance, Starbucks and Nike strategically use AI not just to reduce costs, but to build personalized, dynamic customer interactions that strengthen brand loyalty and stakeholder trust. Enterprises that fail to position AI strategically in their value propositions risk losing relevance, customer loyalty, and sustained competitive advantage in an increasingly AI-driven world.

Exhibit 3: Enterprises must move beyond framing AI as an operational expense

How is AI primarily positioned within your organization today?



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Source: HFS Research in partnership with LTIMindtree, 2025

2 CAPABILITIES

AI-led growth requires a rewiring of the enterprise operating model

Operating and organizational models must evolve beyond the traditional value construct

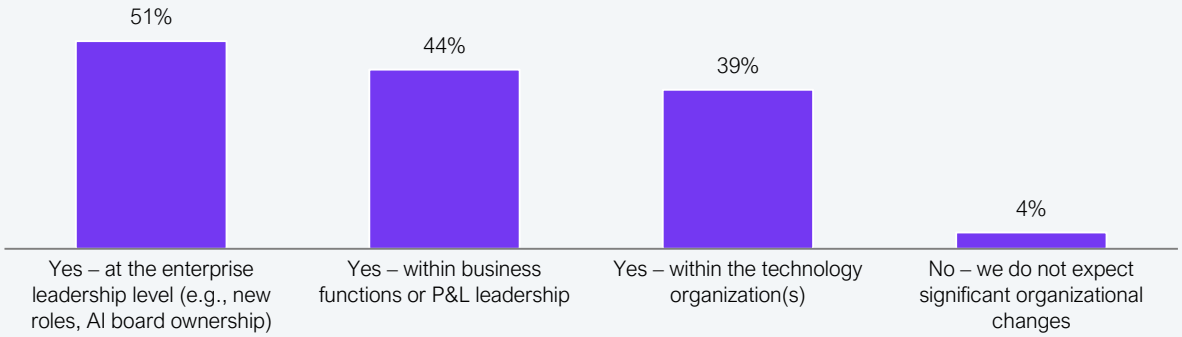
One of the key reasons that digital transformation initiatives have failed is the lack of alignment between business and IT stakeholders. Most enterprises still operate within rigid, siloed organizational constructs that limit agility and delay AI adoption. To fully realize its potential, enterprises must reimagine how capabilities are conceived, designed, and delivered, starting with rethinking the operating model itself. This means embedding AI into decision-making workflows, organizing around real-time data, and enabling cross-functional collaboration. The case for a true OneOffice (seamless connecting the front, middle, and back office) and further evolution to OneEcosystem (collaboration across multiple organizations for new sources of value) has never been stronger, and it is time for enterprises to act on it.

Delivering next-generation value requires a fundamental reimagination of the tools to make that happen. The form factor of current times will unlikely meet the value expectations of the future. Even the revolutionary smartphone, which turned consumer lives on their heads for the better for the past decade, is under pressure as OpenAI and IO join forces to reimagine the form factor of the future. In that case, online shopping and banking, linear manufacturing, and subscription-based streaming are all headed toward disruption. While the path to replacement may be uncertain, enterprises bold enough to reimagine are more likely to write the way forward than those playing it safe and being followers.

Reimagining enterprise capabilities will require a break from traditional organizational constructs. Many enterprises recognize the need for structural change to power their smart adoption of AI. 51% of enterprises (see Exhibit 4) plan to create new C-suite roles or AI-specific board committees, 44% expect to restructure their P&L and functional leadership to align AI ownership with revenue impact, and 39% are considering changes to their technology operating model. These moves signal a growing intent to embed AI at the highest levels of strategy and execution.

Exhibit 4: Enterprises must reimagine the way they are organized and operate to embrace AI fully

Do you anticipate organizational restructuring to embrace AI fully?



Sample: 504 enterprise leaders across Global 2000 enterprises
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The operating model should be intentionally designed for speed, enabling enterprises to move from pilots to scaled impact quickly and repeatedly. This demands flatter structures, agile funding mechanisms, empowered cross-functional teams, dynamic resource allocation, and continuous feedback loops that align delivery with evolving business needs.

Enterprises must prioritize contextual intelligence to deliver differentiated customer value

Enterprises should use AI to deepen their relevance with customers by anticipating unmet needs, offering timely and personalized interactions, and embedding themselves meaningfully into everyday decisions and moments. This is about moving beyond transactional interactions to becoming trusted partners in their customers' lives. A leading bank, for instance, can use AI to optimize internal workflows, anticipate major lifestyle events such as home purchases or tuition payments, and proactively tailor services. A retailer can leverage AI to detect subtle shifts in seasonal buying behavior and prompt customers with personalized recommendations in a proactive fashion.

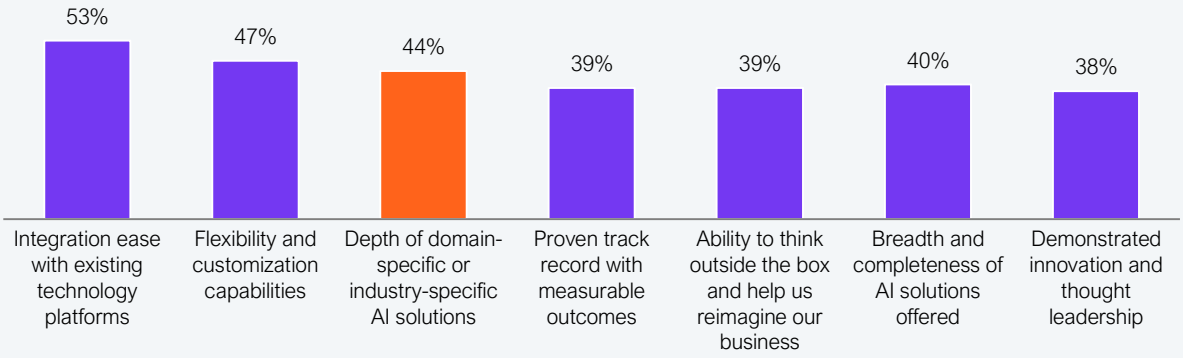
To drive such relevance, enterprises must build AI capabilities rooted not just in their own industry context but, more importantly, in the operating realities of their end customers. This means designing AI around domain-specific experiences, behavioral signals, and situational triggers that vary widely across sectors. For example, in healthcare, AI must understand patient journeys and clinical interactions; in financial services, it must support life-stage-based advisory; in retail, real-time responsiveness and micro-segmentation are critical.

LTIMindtree's BlueVerse Foundry illustrates how enterprises can operationalize this vision by helping business and technical users build and deploy agentic AI solutions via the BlueVerse Marketplace to automate tasks and decision-making in context. For example, marketing teams can use pre-built agents to personalize outreach at scale, while IT teams can automate issue detection and resolution. By embedding these agents into real business workflows, enterprises can move faster from insight to action and create measurable impact.

This pivot toward customer-contextual AI is also shaping enterprise expectations of their partners: 44% of leaders (see Exhibit 5) cite depth of domain-specific solutions as a top priority when evaluating AI portfolios, underscoring a shift from generic capabilities toward tailored, situationally aware solutions that create real customer impact.

Exhibit 5: The Need for Contextual Leverage of AI to Enhance Customer Impact

When evaluating AI solution portfolios from service providers, what matters most to your organization?



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3

ECOSYSTEM

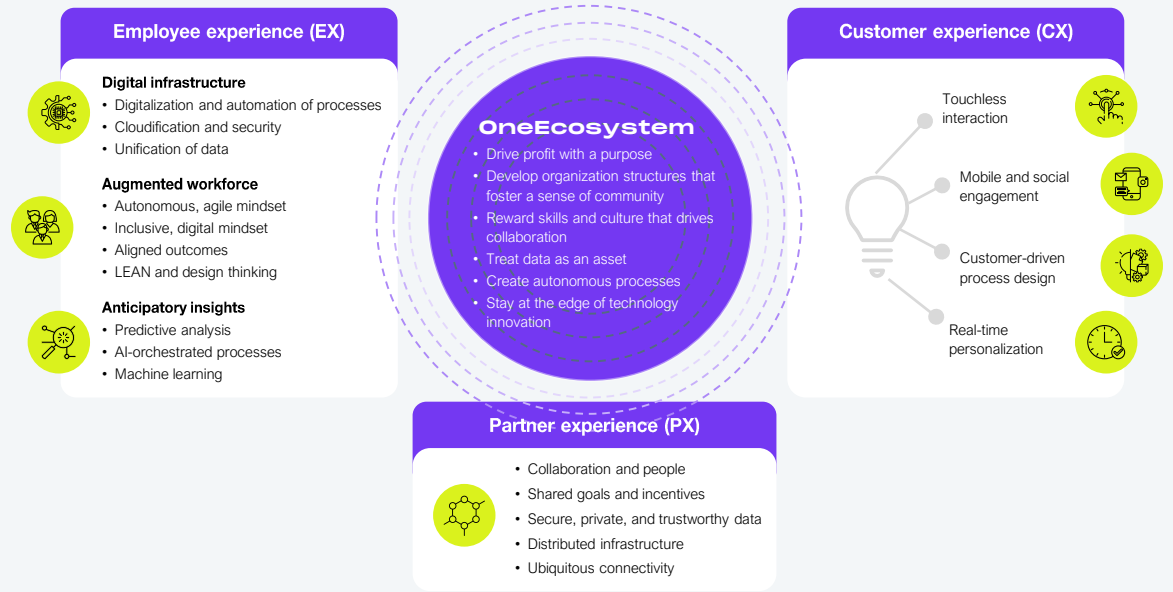
Enterprises must create differentiated ecosystems to address the market effectively

Activating an AI–first ecosystem demands new rules of engagement

As enterprises chart their AI transformation journeys, one truth stands out: they cannot do it alone. The path forward requires embracing a OneEcosystem (see Exhibit 6) mindset—where value is co-created through interconnected partnerships of customers, employees, and customers that transcend traditional silos. This ecosystem must bring together hyperscalers, service providers, cybersecurity experts, AI start-ups, academic institutions, and regulators—not as separate players, but as an integrated network aligned to shared outcomes. Success will no longer be defined by who owns the stack, but by how well enterprises can orchestrate experiences and capabilities across this ecosystem to drive innovation, scale, and differentiation. For instance, BMW's collaboration with Microsoft, along with a network of suppliers and software vendors, exemplifies the OneEcosystem mindset—co-developing an open industrial platform that integrates AI, IoT, and cloud to drive smart manufacturing at scale across its global plants and partner ecosystem.

The speed at which enterprises build and activate OneEcosystem will directly correlate with how quickly they unlock new markets, elevate customer value, and deliver sustainable financial growth.

Exhibit 6: Enterprises must adopt a OneEcosystem mindset to unlock the true power of AI



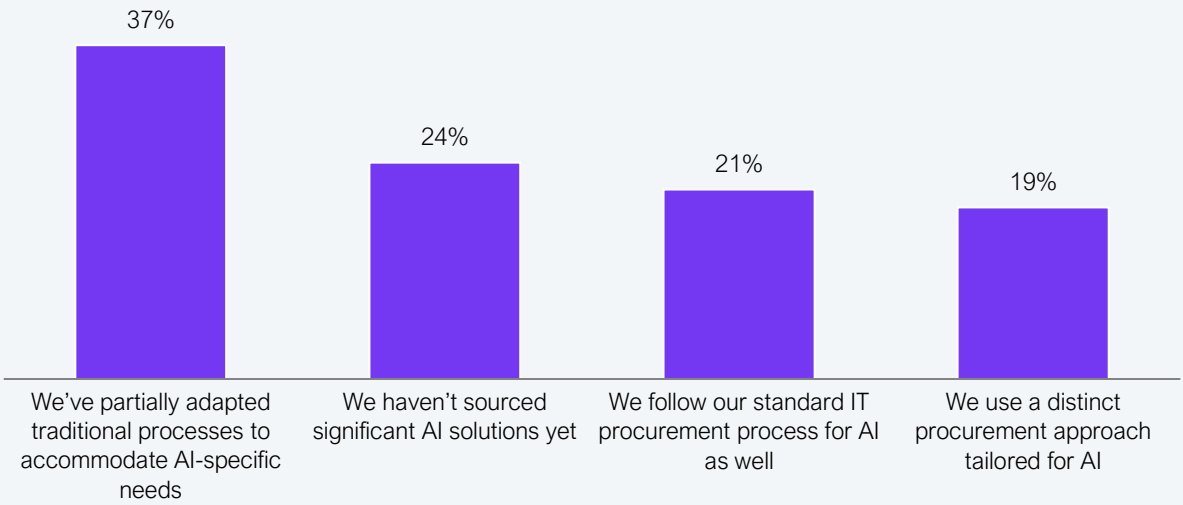
Source: HFS Research, 2025

However, activating OneEcosystem is not possible without fundamentally rethinking how enterprises select, engage, and onboard partners. Traditional IT procurement, built for stability and cost control, is misaligned with the speed, flexibility, and risk appetite needed for AI-led innovation. Only 18% of enterprises have adapted their sourcing approaches to reflect these new realities (see Exhibit 7).

A distinct AI procurement strategy is essential—not just to streamline vendor selection, but to evaluate critical criteria such as innovation readiness, data governance practices, responsible AI usage, and scalability. It allows enterprises to fast-track the onboarding of niche and high-impact partners, adopt flexible and outcome-based contracting models, and ensure faster access to emerging capabilities across the ecosystem. In doing so, enterprises move from managing suppliers transactionally to orchestrating collaborative partnerships that drive strategic value.

Exhibit 7: Enterprises must evolve procurement strategies to effectively operationalize AI

How does your enterprise currently approach sourcing AI solutions or services compared to traditional IT procurement?



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Source: HFS Research in partnership with LTIMindtree, 2025

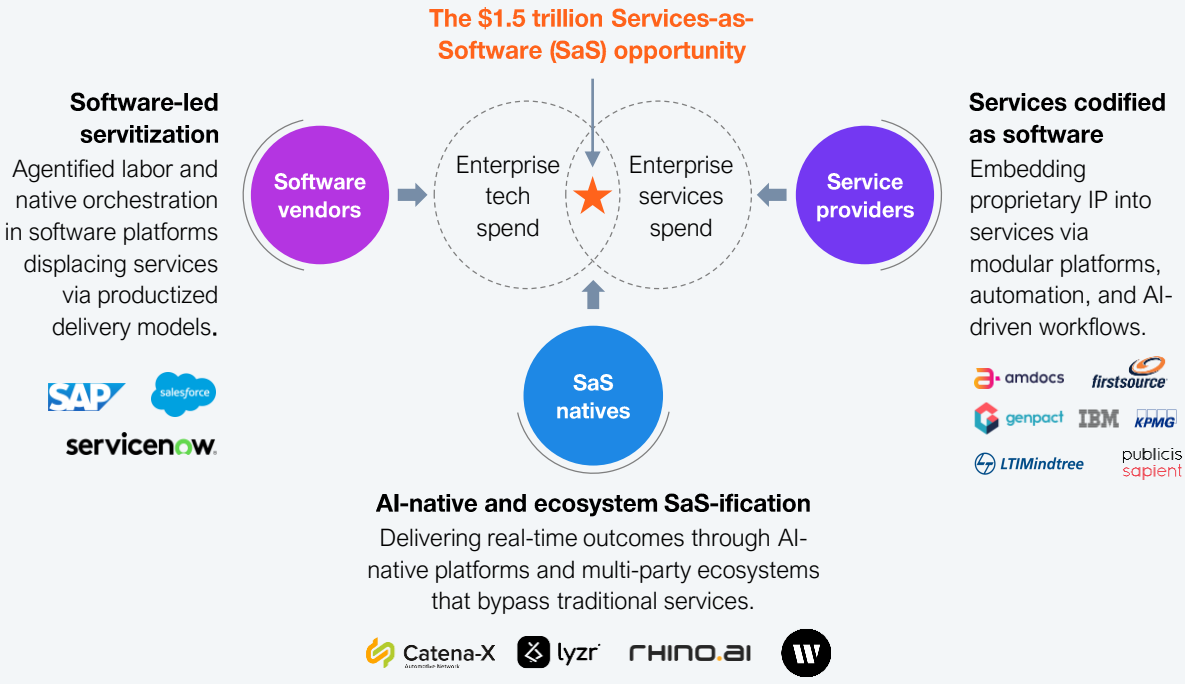
AI-driven Services-as-Software (SaS) delivery is reshaping the supply ecosystem

As enterprises lean into an ecosystem-driven approach to AI, they must prepare for a fundamental shift unfolding across the supply landscape: traditional services and software are no longer distinct swim lanes. Service providers are codifying years of delivery expertise into reusable, software-based assets, while SaaS and platform players are moving upstream to offer service-like experiences anchored in outcomes. This shift is giving rise to SaS, where modular, intelligence-infused solutions embed process logic, automation, and AI into the core of delivery.

LTIMindtree's BlueVerse shows service delivery is evolving to work more like software. Instead of relying on manual processes, it uses AI-powered tools to automate tasks and help teams make better decisions. For example, it applies advanced anomaly detection, self-healing capabilities, and AI-driven change impact analysis in software engineering—accelerating development and enhancing the stability of digital products.

More importantly, the platform shows how the supply ecosystem itself is changing—moving away from custom-built, labor-heavy services toward ready-to-use, intelligence-infused components. By turning delivery expertise into modular, reusable, marketplace-based agentic AI solutions, BlueVerse helps enterprises respond faster to change, reduce costs, and scale solutions more easily across teams and business units. This kind of shift is central to how enterprises will consume and deliver services in an AI-first world.

Exhibit 8: The $1.5 trillion SaS market signals a redefined enterprise supply landscape



Source: HFS Research, 2025

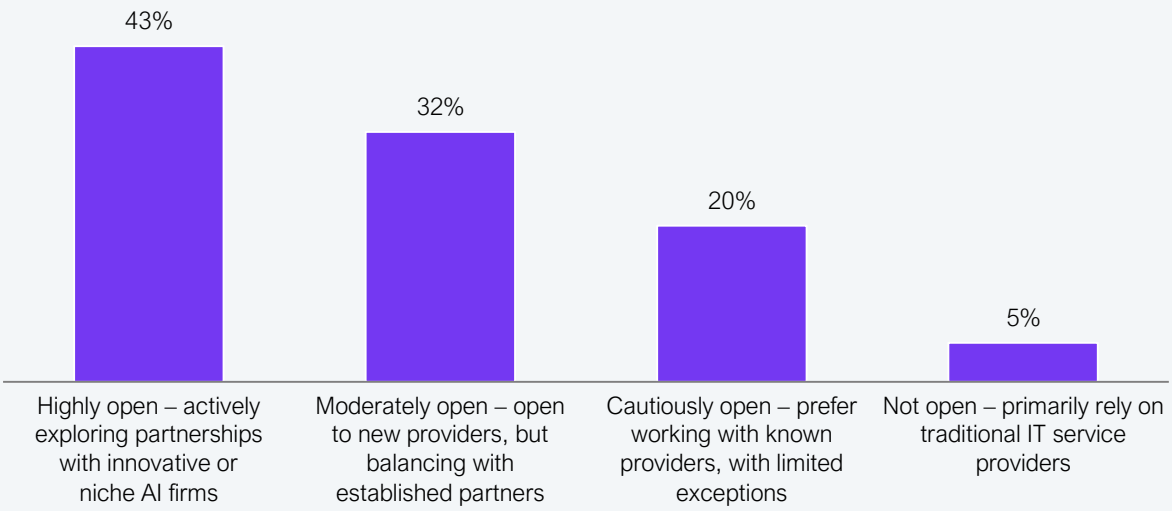
A new ecosystem will require a new evaluation path for enterprises to earn customer relevance

This evolving supply ecosystem expands the range of choices available to enterprises. However, capitalizing on this shift requires enterprises to revisit how they evaluate partners. Traditional procurement models built around headcount, resource commitments, and unit costs are no longer sufficient. Enterprises need to develop new evaluation frameworks that focus on modularity, embedded intelligence, integration flexibility, and alignment to business outcomes.

Notably, 43% of enterprises (see Exhibit 9) indicate a high degree of openness to engaging with specialized or niche AI providers over traditional, larger vendors. This trend reflects a deliberate strategic pivot, prioritizing agility, innovation, and tangible business outcomes over brand recognition or project scale alone. For instance, banks are increasingly partnering with fintech startups to embed AI-driven credit decisioning and fraud detection tools, enabling real-time lending decisions and more personalized risk profiles—capabilities that would take longer to develop internally.

Exhibit 9: Accelerate innovation by partnering with niche AI specialists

How open is your organization to new, specialized, or non-traditional AI providers compared to IT service providers?



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Source: HFS Research in partnership with LTIMindtree, 2025

4 OUTCOMES

Enterprises must rethink what they measure and why

Addressing the core of an enterprise's purpose will require reimagining what 'good' looks like

Growth and profitability remain essential, but how enterprises achieve these outcomes and track progress must evolve. Traditional KPIs focused on efficiency, activity levels, or linear delivery no longer reflect the realities of AI-first operations. As enterprises move from experimentation to scaled AI deployment, their measurement frameworks should reflect impact, relevance, and the ability to adapt in real time.

Success now depends on whether enterprises can improve decision velocity, strengthen stakeholder engagement, and become more integral to their customers' goals. This requires resetting how metrics are defined, tracked, and acted on.

Exhibit 10: A five-step framework to reimagine success for the enterprise

Purpose Make purpose operational	Ensure purpose-driven goals such as inclusion, sustainability, or trust are translated into measurable outcomes that align with AI-driven execution.
Reframe value delivery	Shift the focus from internal productivity to customer and business outcomes. Track whether AI investments accelerate impact, improve responsiveness, or unlock new sources of value.
Measure outcomes, not activity	Move away from metrics such as code shipped or tickets closed. Instead, evaluate outcomes such as time-to-market, adoption rates, or conversion lift.
Track experience and relevance	Introduce metrics that reflect whether customers or users find the experience valuable. Look at indicators such as satisfaction, repeat engagement, or decision influence.
Ecosystem Reframe value delivery	As partner ecosystems expand, enterprises need to measure how co-innovation, shared IP, or joint go-to-market models are driving business value.

Source: HFS Research, 2025

Redesign metrics to better account for AI–driven outcomes

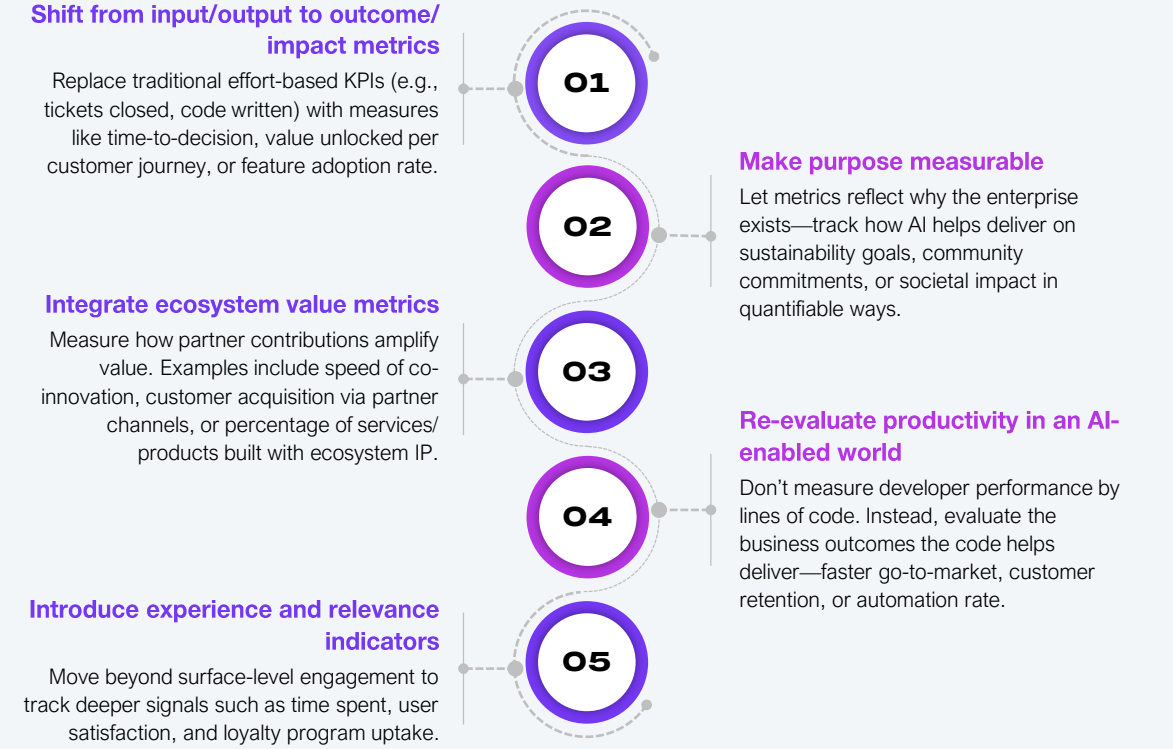
The shift toward an AI-powered enterprise brings a golden opportunity to break free from outdated KPIs and rethink what success truly means. Traditional dashboards—centered on productivity, efficiency, and linear growth—must evolve to reflect new realities driven by AI, ecosystem value, and customer-centric outcomes.

Instead of tracking how quickly an engineer writes code, enterprises should measure the business value that code enables. As AI tools take over basic tasks, impact becomes the true differentiator—the features being used, the experience they enhance, and the revenue they unlock. For example, a media company should look beyond just viewership figures and explore the depth of audience engagement: Do viewers rewatch content, subscribe, or share? Does a major live event generate adjacent sector outcomes such as merchandise sales or application downloads?

To get there, enterprises must reshape their executive dashboards and measurement.

Reinventing metrics will help organizations go beyond tracking operations and give leaders a roadmap to success in an AI-first world, one where evolving customer expectations will require enterprises to reinvent.

Exhibit 11: Enterprises must reshape their executive dashboards and measurement frameworks



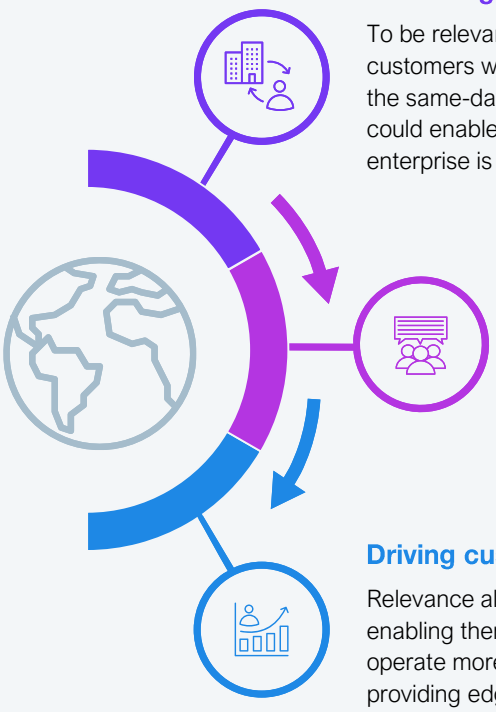
Source: HFS Research, 2025

Redefine what relevance looks like in an AI–first world

Customer expectations are constantly changing. To stay relevant, enterprises should do more than just meet current needs—they must become key enablers of their customers' long-term success. AI can help them understand customer behavior better, anticipate their needs, and deliver more timely, useful solutions. The most relevant enterprises are those that consistently add value and become part of the way their customers live and work.

In today's world, this kind of relevance isn't a nice-to-have—it's a must-have. Enterprises must aim higher and show up as essential partners that make a real difference in their customers' success.

Exhibit 12: Enterprises must keep customer centricity at the core to be relevant



Becoming a core part of customer's business

To be relevant, products or services need to be built into how customers work. For example, a logistics company could power the same-day delivery for a retail chain, or a bank offering APIs could enable smooth payments for online marketplaces, If an enterprise is hard to replace, it is highly relevant.

Helping shape customer's decisions

Relevance also means having the insights your customers need to make smart choices. AI can help by spotting patterns, trends, or risks early. For example, a media firm offering real-time audience data can help broadcasters decide what shows to promote or when to release new content.

Driving customer growth

Relevance also means helping customer grow. This could mean enabling them to create new revenue, reach new markets, or operate more efficiently. For instance, a telecom company providing edge AI and 5G can help a factory automate and unlock major productivity gains.

Source: HFS Research, 2025

The Bottom Line: AI success lies between the extremes of hype and hesitation.

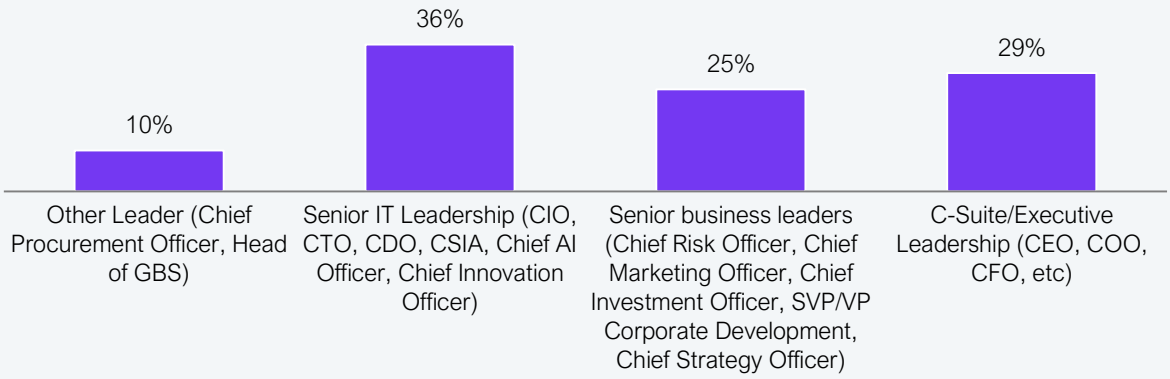
To lead—not just compete—in the AI-first economy, enterprises must craft a pragmatic, outcome-oriented roadmap.

These five priorities can help organizations scale purposefully and stay ahead of the curve:

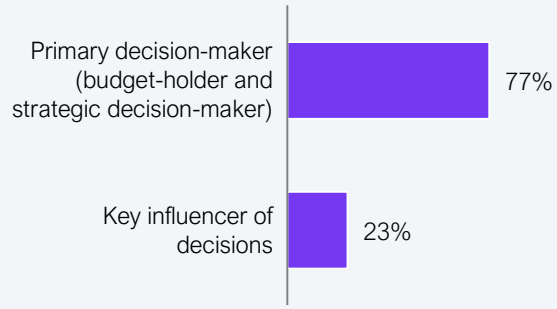
1. **Reimagine your enterprise purpose:** Use AI to move beyond efficiency—build differentiated value, experiences, and revenue models centered on customer impact.
2. **Redesign operating and organizational models:** Align roles, processes, and governance to embed AI into decision-making and outcomes, not just IT workflows.
3. **Invest in contextual capabilities:** Build AI solutions rooted in domain depth, not horizontal tools retrofitted for industry processes and workflows.
4. **Orchestrate a purpose-built ecosystem:** Partner with niche, agile players, and co-innovators that accelerate AI deployment and relevance, not just traditional suppliers.
5. **Measure what matters in the AI era:** Shift success metrics from cost and margin to customer stickiness, time-to-insight, and ecosystem impact.

Demographics

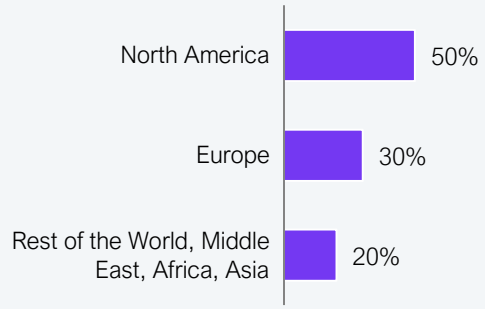
What is your role within your organization?



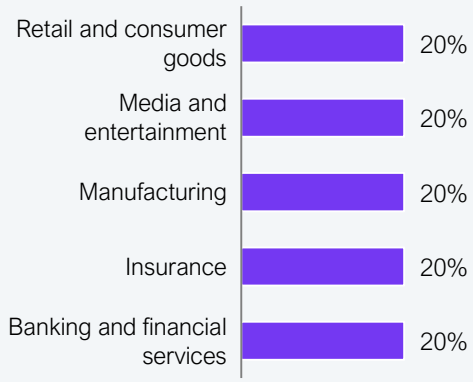
What is your role in your organization's IT and business services?



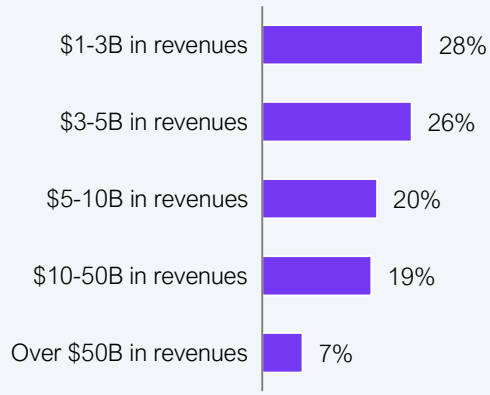
Where are you located?



What industry does your organization primarily operate in?



What is the size of your organization?



HFS Research authors

Rohan Kulkarni
Executive Research Leader

Rohan Kulkarni is an executive research leader for HFS Research. He is responsible for coverage of the healthcare and life sciences practice, bringing to the table his vast experience across the healthcare ecosystem.

Rohan's experience includes serving as the head of healthcare strategy at multiple Fortune 500 companies. He also was member and provider services leader and CIO at two health plans.

Suhas A R
Associate Practice Leader

Suhas is an associate practice leader for HFS Research and a key member of the IT services team. His coverage areas include cloud-native transformation, application modernization, and quality assurance. He also covers hyperscaler strategies and ecosystems across cloud, data, and AI. With more than eight years of experience as a research analyst focused on the tech, media, and telecoms (TMT) sector, Suhas is keenly interested in evolving concepts and emerging technologies.

Ashwin Venkatesan
Executive Research Leader

Ashwin is an Executive Research Leader at HFS Research. He has more than 17 years of experience in the global business services (GBS) and technology services advisory space, with a proven track record as a trusted advisor for C-level executives and services leaders across Fortune 2000 enterprises and service providers.

Before joining HFS, Ashwin was a director at Deloitte's GBS consulting practice, where he spearheaded consulting engagements to help clients set up, scale, and mature their global capability center and outsourcing portfolios.

LTIMindtree Authors

Archana Joshi
Head of Strategy,
BlueVerse AI Services

Archana brings ~25 years of global IT experience solving complex enterprise challenges using AI. She drives strategic vision, ecosystem partnerships, and organizational AI adoption, shaping market perception and future innovation through industry leadership and client-centric transformation.

Sakthivel Sabanayagam
Head of BlueVerse Platforms

Sakthivel is a principal cloud strategist and hands-on technologist with deep expertise in cloud-native engineering and Agentic AI-driven transformation. He leads platform innovation and enterprise-scale AI implementations, shaping LTIMindtree's leadership in next-gen technologies.

Deepak Khosla
VP, GTM & Customer
Success for BlueVerse AI

Deepak Khosla drives LTIMindtree's global AI Go-to-Market (GTM) strategy, helping enterprises adopt and scale AI-infused and AI-native solutions with measurable business impact. At the intersection of innovation and execution, he leads AI commercialization efforts—anchored in open-source innovation, OEM partnerships, and Hyperscaler ecosystems—that unlock new revenue streams, accelerate adoption, and modernize enterprise platforms.

About LTIMindtree

LTIMindtree is a global technology consulting and digital solutions company that enables enterprises across industries to reimagine business models, accelerate innovation, and maximize growth by harnessing digital technologies. As a digital transformation partner to more than 700 clients, LTIMindtree brings extensive domain and technology expertise to help drive superior competitive differentiation, customer experiences, and business outcomes in a converging world. Powered by 84,000+ talented and entrepreneurial professionals across more than 40 countries, LTIMindtree — a Larsen & Toubro Group company — solves the most complex business challenges and delivers transformation at scale. For more information, please visit https://www.ltimindtree.com/

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