PROHANCE zinnov

NAVIGATING AI ROI

How GCCs Can Unlock Scalable Enterprise Value

OCTOBER 2025

FOREWORD

SAURABH SHARMA
CHIEF OPERATING OFFICER
PROHANCE

When Garry Kasparov lost to a machine, he offered a timeless insight:
"AI won't replace humans. But humans who use AI will replace those who don't"

For Global Capability Centers (GCCs), AI is no longer an emerging frontier, it is a strategic imperative. Adoption is surging, but the real barrier isn't technology, it's execution. Too often, pilots multiply without proof of value, while the harder work of measuring, embedding, and scaling AI remains unfinished.

The journey to purposeful scale begins with something simple but often overlooked: **visibility.** Leaders must be able to see clearly where adoption is happening, how deeply AI is embedded in workflows, and where friction still persists. Without that, ambition quickly outpaces reality.

That's why **baselining** matters. Establishing clear before-and-after measures creates the foundation for trust. It allows leaders to quantify adoption, separate activity from outcomes, and align on what "value" really means across teams. Only with baselines and visibility can adoption move from being anecdotal to actionable, from being impressive in dashboards to being impactful in day-to-day work.

At ProHance, we make that visibility real: providing workflow-level baselines and adoption insights that help GCCs scale AI with evidence. The lesson is clear: sustainable AI impact comes not from hype or one-off pilots, but from disciplined, data-driven scaling, built on strong baselines, clear visibility, and measurable adoption.

This whitepaper is a practical guide to:

- Establishing the foundations for scalable AI readiness.
- Driving adoption depth with visibility and proficiency.
- Quantifying outcomes in business terms that matter.

In the AI era, the winners will not be those who run the most pilots, but those who see clearly, measure consistently, and scale purposefully.

FOREWORD

KARTHIK PADMANABHAN
MANAGING PARTNER
ZINNOV

92% of Global Capability Centers (GCCs) are piloting or scaling AI use cases today. Adoption is still a hurdle, but not the biggest one, the biggest hurdle by far is ROI which has layers to it.

Despite the momentum, leaders admit they still lack a structured way to measure AI's business value. Pilots often multiply without proving impact beyond efficiency. Governance is patchy, costs are undercounted, and adoption metrics look impressive on paper but fall short in workflows. The result is a widening gap between effort and measurable return.

The real test for AI is not how many pilots we run, but whether those initiatives deliver tangible outcomes: faster cycle times, fewer errors, more confident employees, happier customers. That is when AI translates from experimentation to Enterprise value.

At Zinnov, our role is to turn AI activity into provable value. This joint whitepaper is our effort to close that gap and converting what we heard from GCC leaders into a practical, structured lens, a way of thinking about AI ROI that goes beyond hype, balances across readiness pillars, and provides a foundation for scaling responsibly.

Inside, you'll find research, executive survey data, and case studies that capture what's working, what isn't, and what must change to unlock ROI at scale.

Whether you're deciding the next AI bet in the boardroom or applying AI to day-to-day work on the front lines, this report will help you cut through the noise, focus on what drives ROI, and make AI a repeatable, trusted Enterprise capability in your GCC.

Insights grounded in 160+ survey responses and 50+ hours of GCC leader interviews across industries

Who we heard from

160+ Survey Responses (Leaders and Employees)

50+ Hours of Leaders' Interviews (1:1 Conversations)

Respondent Mix

Decision-makers shaping AI adoption

76%

Executives, Vice Presidents and Senior Directors

Mature operations with meaningful AI scale

~75%

GCCs with >2,000 Employees

Ground-level insights from GCC workforce

72%

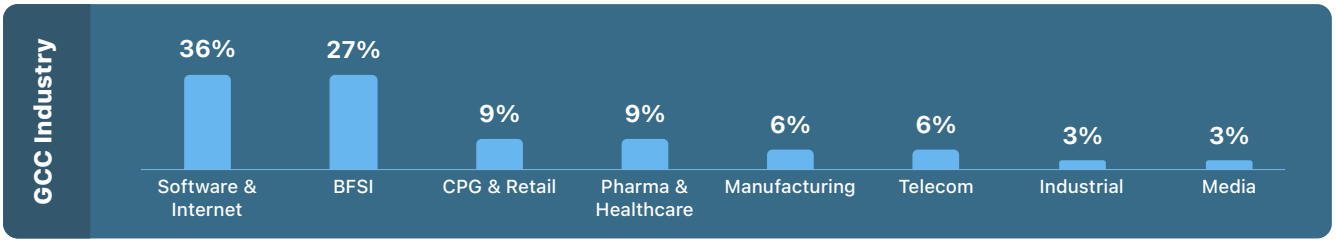
Early-to-mid Career Employees

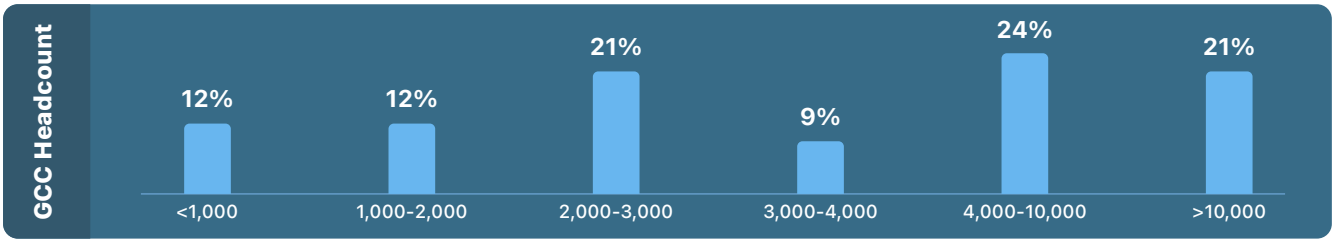
ER&D, IT, BPM, Strategy and Operations included

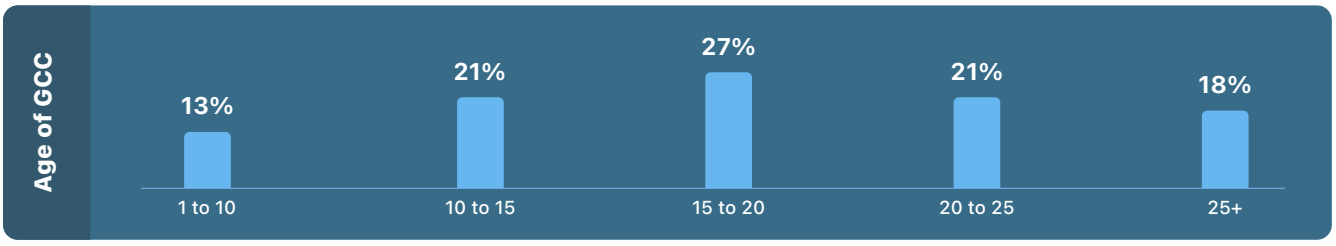
Cross-functional

Product, Platform, and Process

GCCs' Profile







Note: Findings are based on this sample and are directional, not exhaustive.
Source: Zinnov Research and Analysis

Table of Contents

EXECUTIVE SUMMARY

AI adoption in GCCs is no longer the hurdle

92% of GCCs are piloting or scaling use cases. The unresolved challenge is ROI as 72% of leaders admit they lack a structured ROI framework, leaving investments justified by promise rather than proof.

Readiness gaps undermine ROI clarity

Fragmented data, generic training, weak governance, and adoption that looks deep on dashboards but shallow in workflows continue to stall value creation. These gaps echo mistakes from earlier technology waves, Cloud's slow scaling and RPA's hype-driven failures.

Building on these, this whitepaper draws from survey insights, leadership perspectives to introduce an ROI from AI framework, a thinking lens that helps leaders measure and maximize AI's value.

This ROI from AI framework rests on five essential dimensions

- **Stage of Maturity**
  Align ROI expectations with the evolution from pilots to Enterprise scale
- **Baseline**
  Establishing realistic starting points for credibility
- **Adoption (Breadth, Depth)**
  Assessing scale across teams, processes
- **Total Cost of AI Ownership**
  Account for tech, data, talent, compliance, and change
- **Value Delivered**
  Measure efficiency, accuracy, compliance, customer, and talent outcomes

The winners will balance speed with discipline

Leaders must measure ROI from day one, reinvest learnings into governance and data foundations, capture both hidden costs and intangible value, and embed AI as a systemic capability, not a one-off experiment.

This paper combines Zinnov's research-driven perspective with ProHance's practitioner insights, building on last year's collaboration.

2

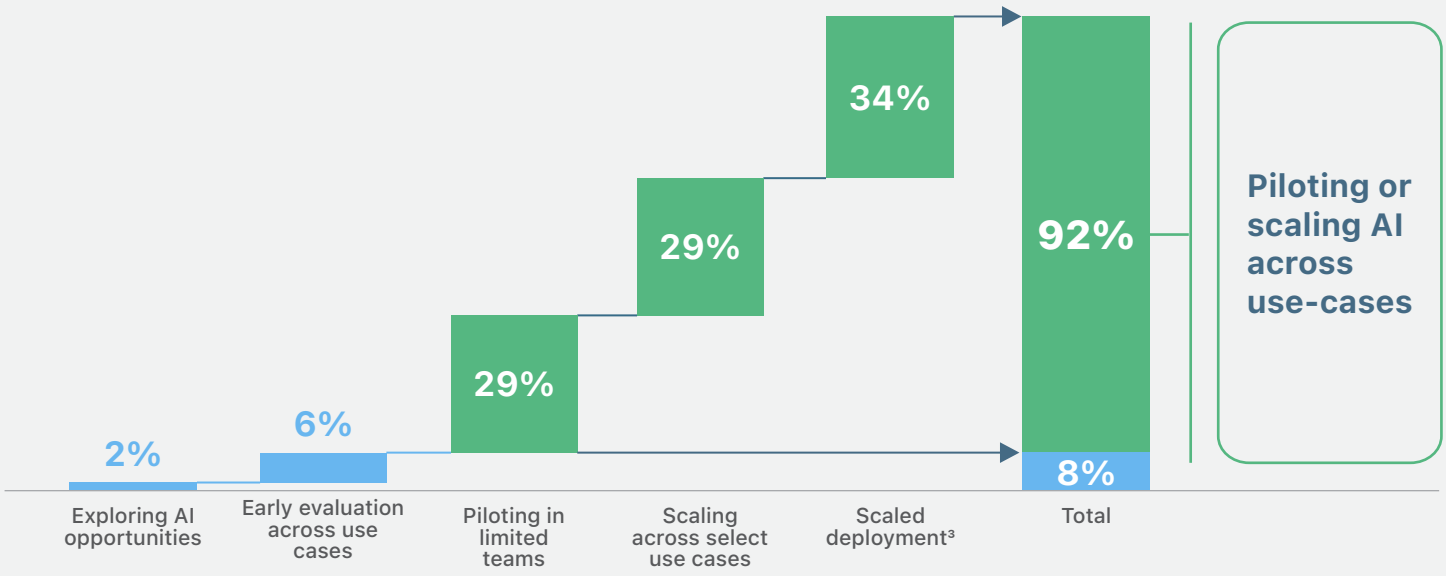
AI MOMENTUM IN GCCs

FROM PILOTS TO PRIORITY

AI adoption has crossed the tipping point: GCCs are moving from pilots to scaled deployment

AI[1] has moved beyond experimentation. It is now a C-suite mandate and a boardroom priority. What makes this moment different is the emergence of autonomous agents. In this era of Agentic AI, GCCs will play a bigger role than ever, not only in driving Enterprise-wide adoption but also giving headquarters the competitive edge through faster innovation, disciplined execution, and scale.

Where is your GCC on the AI adoption journey?[2]



Zinnov's recent survey[2] indicates that **92% of GCCs are either piloting or scaling AI use cases.** Leading GCCs are already leveraging AI across Product Innovation, Product Development, Operations, Customer Service, Compliance, and Analytics.

Our conversations with GCC Leaders confirm this momentum, showing how **GCCs are moving AI deeper into business functions and operating models.**

- GCCs are embedding AI copilots and assistants into day-to-day work across HR, Finance, Procurement, and Compliance, not limiting it to tech teams
- GCCs are moving towards fail fast approach by shifting from **year-long experiments to 90 days pilots driven by Agentic AI**
- India is home to over 1,800 GCCs. Even with a conservative estimate that **10% initiate AI pilots** each year, this potentially translates to roughly **700+ new pilots annually**
- While the pace of progress may differ for each GCC, leaders are unanimous that **AI is now a strategic priority**

> **"We've crossed the tipping point. GCCs must now focus on driving AI business outcomes and ROI, not just experimentation.**
>
> **- VP, Engineering (Software & Internet)**

Note: 1. AI/GenAI in this report refers to Generative AI, systems that help create original content such as text, code, or visuals. Please refer to the glossary for a detailed definition. 2. Zinnov GCC Leaders Survey: AI Adoption Trends in 2025. 3. Scaled deployment across multiple use cases (GCC and/or Enterprise).
Source: Zinnov Analysis, Primary Research and Expert Interviews

GCCs are uniquely positioned to lead Enterprise AI transformation

As Enterprises embrace AI as a core strategic priority, India's GCCs emerge as natural leaders in driving this journey enabled by deep AI talent, seamless Enterprise integration, and a strong cost-to-value edge.

India's GCC Advantage: Talent, Integration, and Cost-to-Value

Talent Advantage

416,000	India ranked 2nd globally[1] in installed AI talent base
~45%	Proportion of experienced AI experts (with >6 years) based in India's GCCs
2.75	AI Skill Penetration Factor[2] in India is the highest in the world

Enterprise Integration

- **Embedded** in Enterprise workflows across Tech, Product, and Operations
- Strong **domain** and **process** knowledge that drives adoption with business outcomes
- **Trusted** to run core workloads (e.g., software development & product engineering, R&D) and co-own products with HQ

Cost-to-Value

AI engineering talent in India delivers a 2.5–4.5x cost advantage at junior–mid levels, with the gap narrowing at senior levels; enabling substantial savings for Enterprises.

AI Engineer experience	India median base pay[3]	US median base pay[3]
0-5 years	USD 22,500 – USD 35,000	USD 105,000 – USD 155,000
5-10 years	USD 60,000 – USD 85,000	USD 150,000 – USD 205,000
10+ years	USD 125,000 – USD 175,000+	USD 195,000 – USD 300,000+

Together, these strengths position GCCs as orchestrators of AI roadmaps, incubators of innovation, and stewards of governance across the Enterprise.

Orchestrators	Incubators	Stewards
Co-own Enterprise AI roadmaps with HQ	Experiment and evolve new AI ideas into scalable solutions	Drive governance for scalable delivery
Align strategy with Enterprise priorities	Identify relevant partners/start-ups for AI innovation	Build AI skills and digital fluency

> **By co-locating scientists, engineers, and product managers in India, we can deliver agentic AI experiences that global teams alone cannot.**
>
> **- VP, Strategy & Operations (Software & Internet)**

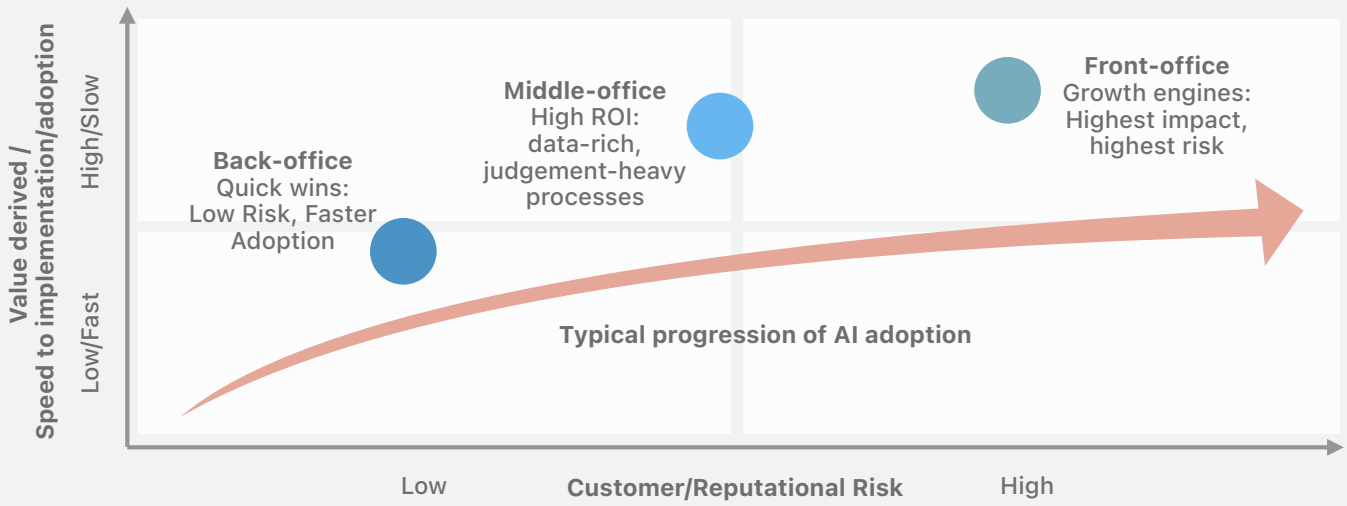
Note: 1. Data from China has not been considered. 2. AI Skill Penetration Factor is self-reported by LinkedIn members by country and against a global average benchmark. AI Skill Penetration of 1.5 means that workers in that country are 1.5X more likely to report AI skills than workers in the benchmark. 3. Figures represent median fixed compensation across various AI/ML job families in India and the US. Ranges reflect 50th percentile values across experience bands; excludes bonus/equity. Senior AI talent in both India and the US can exceed upper bounds in niche markets.
Source: Zinnov Analysis, Primary Research, Expert Interviews, Draup Cost Simulation Module (data from global salary platforms, company postings, and official boards)

The Middle-office is the AI disruption zone, GCCs' sweet spot for value creation

> **GCCs start with back-office pilots to prove value, build momentum in the middle office where transformation happens, and then step into the front-office where the rewards are big but so are the risks.**
>
> **- CTO, (Software & Internet)**

Our conversations with GCC leaders show a clear pattern, GCCs typically start in Back-office to build trust, demonstrate quick wins, move to the Middle-office where disruption and ROI are the highest, and carefully enter the Front-office (customer-facing) that demands the highest guardrails.

Adoption Pathway



Note: Illustrative placement based on expert interviews; directional rather than absolute

Back-office (Foundational efficiency, early adoption)	Middle-office (Disruption zone, GCC sweet spot)	Front-office (Growth engines, high risk & reward)
Purpose: Build trust and momentum with low-risk areas delivering early wins **Examples:** HR bots, Finance Reconciliations, IT Service Automation **Outcomes:** Early productivity gains and cost savings; builds skills and embeds governance	**Purpose:** Unlock higher value by applying AI to data-rich, judgment-heavy processes where GCCs have strong domain expertise **Examples:** Fraud detection & AML (BFSI), pharmacovigilance (Life Sciences), demand forecasting & supply optimization (CPG/Retail), claims management (Insurance) **Outcomes:** Significant ROI gains through accuracy, speed, scale; reduced operational risk	**Purpose:** Drive growth by embedding AI into high-stakes, customer-facing interactions that influence top-line and experience **Examples:** Personalized marketing, AI-assisted sales, product innovation, insights, Tier-I customer support **Outcomes:** Revenue growth, differentiated customer experiences; GCCs need to manage the higher compliance, and reputational risks that come with customer-facing AI

Note: The priority of back, middle, and front office AI adoption varies across GCCs depending on their industry context, regulatory requirements, and risk appetite

Not every GCC follows the same sequence or pace. What stays common is the need to move from experimentation to orchestration with sharper attention on value realization.

Source: Zinnov Analysis, Primary Research and Expert Interviews

The momentum is undeniable; Leaders must shift the focus to unlock the true potential of AI

The journey from efficiency to Enterprise-wide impact has critical imperatives for GCCs. Zinnov distills these into mandates that leaders must prioritize.

Zinnov Point of View[1]

AI is no longer a choice, it is a mandate

GCCs must treat AI as a core Enterprise capability, scaling it in a structured way while balancing risk, trust, and value

GCCs must orchestrate, not just implement

Co-own the AI portfolio, set guardrails, and build reusable platforms to scale value across functions and regions

Balance quick wins with high-risk, high-impact bets

Leaders are sequencing AI deployment to balance quick wins with high-impact bets, moving from internal efficiencies to external market differentiation

Next steps for GCC leaders

01

Institutionalize foundations

Strengthen foundations and readiness across Data, Infrastructure, Talent and Governance

02

Drive breadth and depth of AI adoption

Embed AI into daily workflows, measure usage, and drive change programs

03

Measure value and prove ROI

Define the ROI logic upfront (baselines, scenarios, time-to-value, P&L attribution) and track KPIs per use case

Note: 1. Zinnov POV has been shaped through a triangulation of research inputs (primary, secondary), expert interviews, and internal expertise
Source: Zinnov Analysis, Primary Research and Expert Interviews

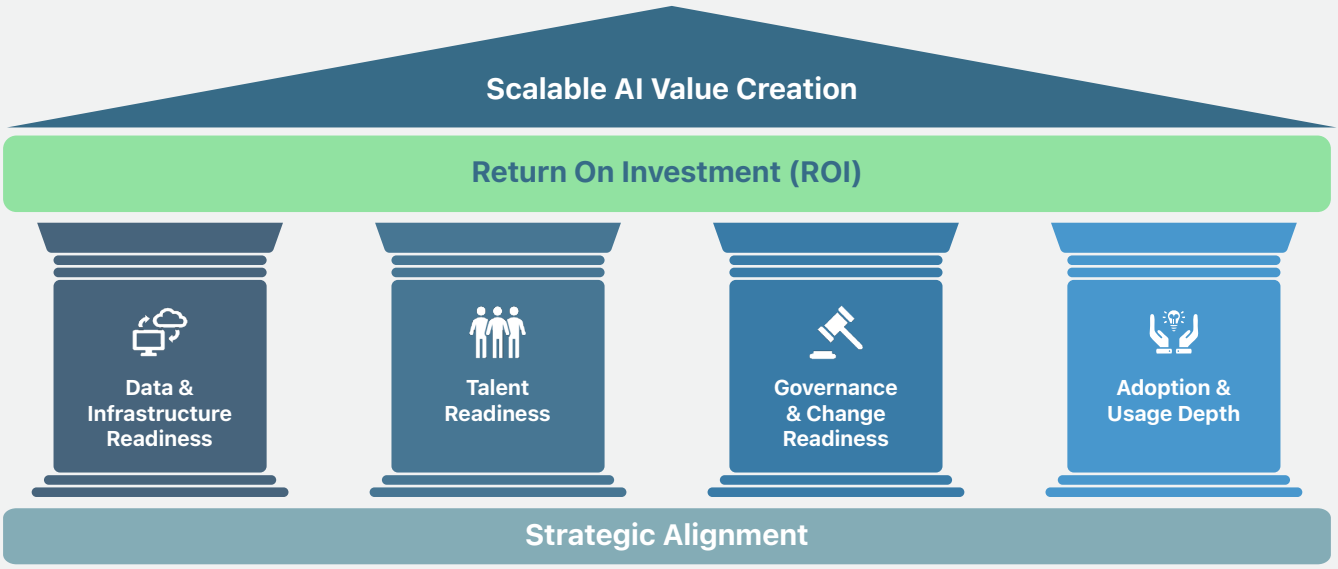
3

BUILDING AI READINESS

Four critical pillars hold the key to unlock scalable value from AI

To deliver on the next steps, GCCs must strengthen readiness across four critical pillars and ROI that enable **Scalable AI Value Creation.**

AI Readiness Framework for GCCs



ROI from AI rests on four pillars. This paper introduces a structured ROI lens to link readiness with measurable value across use cases.

Data & Infrastructure Readiness is the GCC's ability to provide:

- Unified, **high-quality, secure,** and accessible data
- **Scalable** infrastructure
- Ensures **accessible, privacy-assured data** for AI at scale

Talent Readiness is the GCC's ability to:

- Foster **change awareness**
- Clarify **roles** and **responsibilities**
- Promote **continuous learning**
- Enable effective AI adoption and **workforce transformation**

Governance and Change is the establishment of:

- Clear structures, **roles,** and **policies**
- **Proactive** change management
- Ensure **accountability** and **compliance**
- Accelerates **scaling** and GCC-wide acceptance

Adoption & Usage Depth is to:

- **Track, measure,** and improve AI adoption
- Use **data-driven insights** for continuous improvement
- Ensure **sustained value** and **impact** from AI initiatives

Strategic Alignment: The foundation which includes global alignment, leadership vision & buy-in, AI roadmap, etc.

The analysis ahead unpacks each pillar of this framework, highlighting what GCC leaders are experiencing, case studies, Zinnov's point of view, and how these elements connect to ROI.

Source: Zinnov Analysis, Primary Research and Expert Interviews

Scalable AI adoption starts with breaking data silos, ensuring compliance and bridging infrastructure gaps

What we found?

66% **GCC leaders cited challenges on data readiness, data governance and infrastructure gaps**

A	**Data Quality & Unification**	Fragmented datasets and siloed data hinder integration and delay access
B	**Data Privacy & Compliance**	Strict regulations, cyber risks, and client hesitancy around sharing data (e.g., BFSI, Pharma, Healthcare)
C	**Infrastructure Scalability**	Limited compute capacity, legacy integration, and siloed systems

> **We can't talk about AI impact without talking about data readiness – it is extremely critical. You can't scale AI with fragmented, inconsistent data.**
>
> **- Head, Process Excellence (Retail)**

Zinnov Point of View

Unify data and adopt agile data practices

Centralize data lakes with strong stewardship and continuous data cleansing. Pilot with focused datasets and iteratively refine to scale

Embed privacy, security and compliance by design

Align data privacy and security strategies with regulations from the start (HIPAA, GDPR, etc.)

Build cyber safeguards, implement privacy frameworks, auditability, and explainability

Modernize infrastructure and scale capacity

Investing in Cloud, GPUs, and middleware is key to overcome legacy and compute constraints, enabling real-time, cross-functional access and support workloads

Source: Zinnov GCC Leaders Survey: AI Adoption Trends in 2025, Zinnov Analysis, Primary Research and Expert Interviews

Case Study | Healthcare GCC overcame data barriers through unified platforms, embedded governance, and agile execution

Problem Statement

- A global Healthcare GCC set out to scale AI, but blocked by Data and Security hurdles:
  - Fragmented Data, siloed legacy systems
  - Heavy compliance overhead
  - Rising Cybersecurity risks

Adopted Approach

- **Governance First:** Dedicated AI governance and security teams ensured design, privacy, and compliance reviews, supported by mandatory training, in adherence to global standards.
- **Unified Data Platforms:** Migrated to single EHR/ERP and built a common data platform and knowledge graphs, merging diverse sources. Self-service analytics and agentic workflows empowered teams and eliminated data silos
- **Security & Privacy:** Built proprietary security models and platform-driven defenses, reducing risk through expert collaboration and cyber capabilities
- **Agility Over Perfection:** Launched pilots, iterated governance and established quarterly innovation sprints to fuel a "fail fast, learn faster" culture

Impact / Outcomes

- **>50% lower administrative burden** and improved data quality, and accuracy
- **>80% Improvement in process efficiency and reduction in error rates (removing manual process),** boosting compliance
- Security platform **accelerated review cycles,** boosting resilience and trust
- **Continuous innovation** through iterative execution

> **When working with large language models, it's essential to follow best practices to ensure data compliance; especially, making sure sensitive data doesn't leave your organization.**
>
> **- Head, Data and MLOps (Automotive)**

> **Infrastructure, AI, and business value boundaries are disappearing. Companies require integrated platforms where AI infrastructure, data capabilities, and business outcomes are seamlessly connected, as the market is rapidly consolidating towards unified platforms.**
>
> **- Head, AI/ML (Software & Internet)**

Source: Zinnov Analysis, Primary Research and Expert Interviews

Generic AI training fails; GCCs need role and domain-specific skills to drive real adoption and confidence

What we found?

47% **GCC leaders cited gaps in AI-ready talent and skills**

A	**Upskilling on AI**	Generic AI training falls short given the diverse functional and domain contexts
B	**Continuous Skill Refresh**	AI tools and practices evolve too fast for traditional L&D to keep up
C	**Change Awareness**	Employees resist AI due to limited understanding of its role and unclear responsibilities

> **People will learn AI faster when they're inspired, not threatened. Give them the experience first, and the behavior will follow.**
>
> **- Global Head, People & Culture (Software & Internet)**

Zinnov Point of View

Training must be role and domain-specific

Avoid generic AI training; pair domain immersion with role-based skill maps to make learning directly relevant

Specialized talent sourcing

Build partnerships with academia and industry to attract AI talent and close specialized skill gaps in regulated or domain-intensive sectors

Make AI learning continuous / ongoing

Treat AI learning as a continuous investment, with refresh cycles, peer guilds, and hands-on labs integrated into everyday work

Effective communication

Position AI as augmentation, backed by role clarity and practical use cases, to counter fears and build trust

Source: Zinnov GCC Leaders Survey: AI Adoption Trends in 2025, Zinnov Analysis, Primary Research and Expert Interviews

Case Study | Technology GCC closed skill gap with domain-specific training and continuous upskilling partnerships

Problem Statement

- A leading Technology GCC faced significant challenges in AI workforce enablement:
  - Generic training led to skill mismatches and poor adoption in complex domains
  - Specialized AI expertise remained a critical gap

Adopted Approach

- **Role-Based, Domain-Relevant AI Training:** Designed domain-specific journeys, mapping skills to job functions for technical, business, and product teams. Aligned training and exercises to each function's unique challenges and data landscape for day-to-day relevance
- **Building Strategic Partnerships:** Collaborated with universities and industry partners to co-create specialized AI courses including modules targeting compliance, ethics, and emerging technologies
- **Continuous Upskilling and Peer-Led Communities:** Established an AI Community of Practice that drove employee-led events. Created an upskilling intranet which provided up-to-date AI information to employees as per their roles and industries

Impact / Outcomes

- **~20% improvement in work quality** of employees
- **>50% employees** gained **AI exposure** via domain specific L&D
- Intranet: **20,000 unique viewers**, and **>100,000-page hits in first 8 months**

> **We've invested 10,000+ internal training hours to upskill employees on AI across all products and business areas.**
>
> **- Head, Data and MLOps (Automotive)**

> **Proficiency in using AI is a key and hand-holding is required because tools like native LLMs can give different responses for the same question based on how it's asked, making prompting a critical skill.**
>
> **- Global Head, Business Automation (BFSI)**

Source: Zinnov Analysis, Primary Research and Expert Interviews

Most GCCs lack structured AI governance; trust requires clear structures, accountability, policy, and change

What we found?

55% **GCC leaders cited lack of structured AI governance as a key barrier**

A	**Governance Structures**	Fragmented governance and absence of structured forums slow scaling and increase risk
B	**Accountability & Ownership**	Undefined ownership creates duplication and misalignment
C	**Policy & Compliance Governance**	Immature policies, compliance gaps and evolving regulations
D	**Change Management Program & Structure**	Most GCCs rely on ad-hoc trainings or emails; without formal program structures and communication channels / mechanisms, adoption momentum is lost

> **AI adoption is not only a technology challenge but a human one. Without structured governance and cultural readiness, even the best tools fail to scale.**
>
> **- Global Head, Workforce Management (BFSI)**

Zinnov Point of View

Governance-first mindset establishes trust

Integrate ethics, compliance, and explainability from day one to avoid rework and accelerate adoption

Clear accountability enables scale with confidence

Define responsibilities (RACI), assign ownership, and enable roles to strengthen accountability

Change management must be built into the journey

Effective AI adoption requires programs with clear design, staged rollouts, and embedded champions, rather than reactive or improvised communication

Source: Zinnov GCC Leaders Survey: AI Adoption Trends in 2025, Zinnov Analysis, Primary Research and Expert Interviews

Case Study | Financial Services GCC eased workforce concerns by embedding early governance and cultural change

Problem Statement

- A leading global Financial Services GCC sought to accelerate AI-driven innovation but was impeded by:
  - Unclear ownership and governance for AI initiatives
  - Workforce concerns about automation's impact on roles
  - Evolving regulatory requirements and complex compliance obligations

Adopted Approach

- **Governance Embedded Early:** Established specialized AI governance and digital ethics teams to guide project launches, ensuring every initiative met strong compliance and responsible AI standards from the outset
- **Culture as the Enabler:** Embedded change management into the transformation journey. Leaders positioned AI as augmentation and productivity, not replacement. Appointed **"change liaisons"** across departments to ensure best practices, share learnings, and spotlight early wins
- **Scaling Through Iterative Wins:** Launched focused pilots in areas such as customer operations and product lifecycle management, using rapid feedback and data-driven outcomes

Impact / Outcomes

- **>50% reduction in administrative workload,** due to improved data quality
- **>70% improvement in efficiency and error rates** by eliminating manual processes and enhancing compliance
- **6–10% rise in overall productivity** from integrated governance
- **Decrease in change resistance** driven by regular knowledge sharing

> **AI adoption fails when change management is reactive. Positioning AI as augmentation, not replacement, eases fear and unlocks behavior change.**
>
> **- SVP, Operations (BFSI)**

> **Governance is not just compliance. When you embed it from day one, adoption accelerates, and you avoid painful rework.**
>
> **- VP, Solution Architect (Software & Internet)**

Source: Zinnov Analysis, Primary Research and Expert Interviews

The adoption gap is wider than leaders think; visibility and measurement are critical first steps to close the gap

What we found?

63% GCC leaders cited challenges on visibility, measurement, and AI adoption depth

> **If you don't know your baselines, capacity, productivity, you can't articulate the benefits of AI or any efficiency tool.**
>
> **- SVP, Division Operations (BFSI)**

A **Visibility Gap**

Most lack a real-time, unified view of AI usage across roles and geographies. Inconsistent tracking leaves leaders without clarity on usage patterns

> **I've not seen anybody define a clear way to measure impact. There is no structured model to measure how AI is delivering outcomes.**
>
> **- Head, Process Excellence (Retail)**

B **Measurement Gap**

Adoption is often reported but rarely linked to business outcomes. Missing baselines and inconsistent metrics prevent leaders from linking AI usage to value realization

> **Less than 40% of users are actually proficient in using AI tools. Most have access, but without training or role-specific playbooks, confidence remains low.**
>
> **- Global Head, Workforce Management (BFSI)**

C **Proficiency & Role Enablement Gap**

Employees get access to tools but lack role-specific playbooks and prompting skills, limiting confidence and deep usage

> **There's a lot of fear around AI when it comes to job loss. Employees hesitate to openly discuss AI, and they're unsure whether it threatens their role.**
>
> **- AVP - Head of Data, India (Software & Internet)**

D **Cultural Resistance & Trust Barriers**

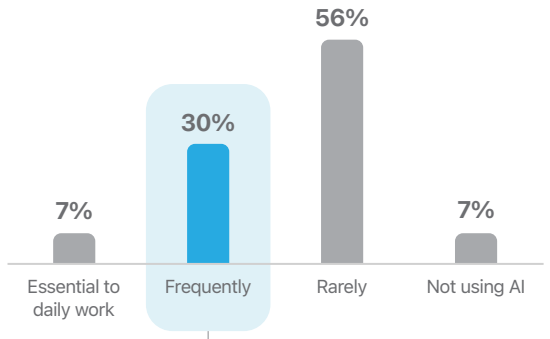
Fear of job loss and muted trust hinder adoption. Leaders themselves can stall adoption with excuses or hesitation

Source: Zinnov GCC Leaders Survey: AI Adoption Trends in 2025, Zinnov Analysis, Primary Research and Expert Interviews

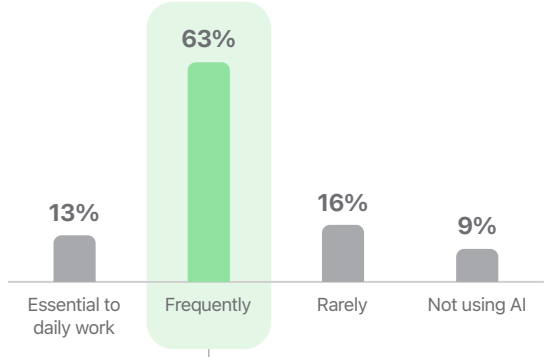
Adoption is stronger than leaders realize; but without measurement, scaling decisions are blind

AI adoption is stronger on the ground than leaders perceive, yet fragmented tracking and limited measurement undermine data-driven scaling strategies.

How frequently do you think employees use AI?[1]



How frequently employees use AI?[2]

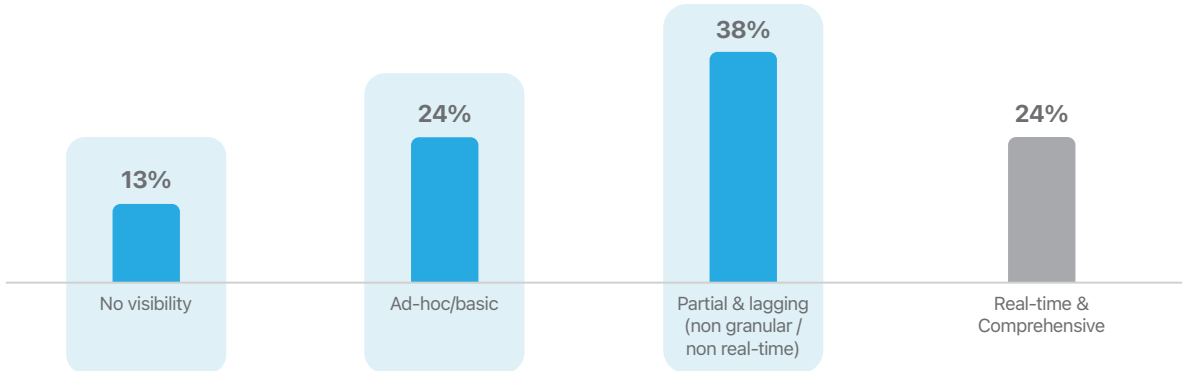


Visibility gap

- Employees report higher adoption than leaders acknowledge
- Leaders' limited visibility creates misaligned adoption strategies

Leaders Employees

How comprehensively is AI usage tracked by leaders?[1]



Measurement gap

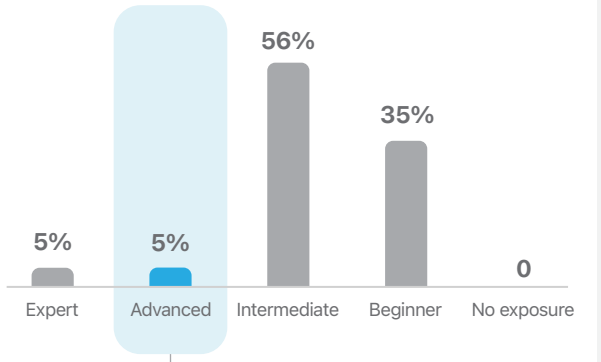
- Leaders see anecdotal wins; but lack robust measurement. Tracking is fragmented, often limited to isolated teams or pilots
- Lack of robust measurement prevents evidence-based scaling

Note: 1. Zinnov GCC Leaders Survey: AI Adoption Trends in 2025, 2. Zinnov Employee Pulse Survey 2025
Source: Zinnov Analysis, Primary Research and Expert Interviews

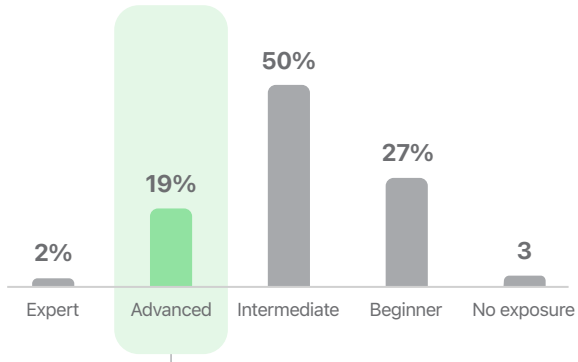
Leaders underestimate proficiency and benefits, employees report 2–3X higher impact from AI adoption

Leaders lack visibility and underestimate AI's benefits, while employees report higher impact. Fragmented tracking and low trust hinder adoption, measurement, and evidence-based scaling.

What do you think is the level of your employee AI proficiency?[1]



What is the level of employee AI proficiency?[2]

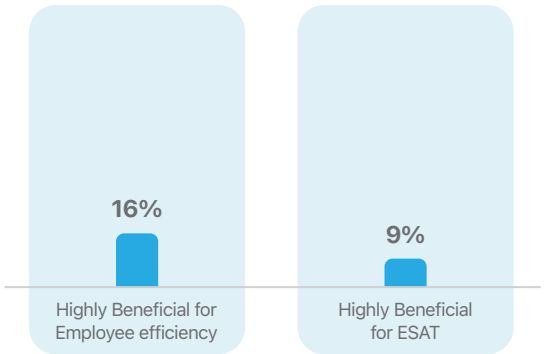


Proficiency gap

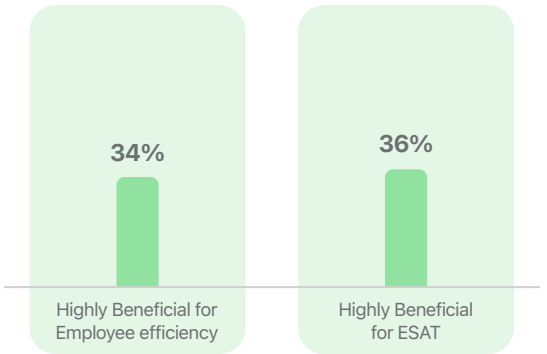
- Leaders struggle to gauge employees' AI skills, as around one-third of employees depend on self-learning according to Zinnov's survey
- Lack of skills and seamless integration slows scaling

Leaders | Employees

How do leaders perceive the impact of AI adoption on ESAT and efficiency?[1]



How beneficial has AI adoption been in improving ESAT and efficiency?[2]



Cultural resistance, trust gap

- Employees are reluctant to share AI benefits due to job security, pressure to do more with less resources, and lack of openness on AI internal usage
- Resistance and fear undermine adoption momentum and slow progress

Note: 1. Zinnov GCC Leaders Survey: AI Adoption Trends in 2025, 2. Zinnov Employee Pulse Survey 2025
Source: Zinnov Analysis, Primary Research and Expert Interviews

AI adoption is often overstated; leaders must embed systemic strategies that drive impact

Zinnov Point of View

Build visibility from day one

Establish baselines and unify adoption dashboards across functions, roles, and geographies to monitor real usage patterns

Tie adoption to outcomes

Link adoption metrics to business outcomes through structured pilots, scale-up strategies, and outcome-focused KPIs

Empower roles with workflow-native playbooks

Combine workflows with role-based playbooks and prompt libraries to help employees build confidence in everyday tasks

Build trust with change programs

Reframe AI as augmentation, use open forums and peer champions, and showcase leadership usage to shift adoption from fear to enablement

> **Uncertainty about the actual penetration and impact of AI within organizations, suggests that many are merely "scratching the surface" without a clear, well-defined adoption strategy or understanding of AI's broader implications for work.**
>
> **- Head, Data and MLOps (Automotive)**

> **There is often a gap between giving people access to AI tools and seeing them use it effectively. Usage is influenced by proficiency, training, and cultural comfort, and without these adoption looks bigger on paper than it really is.**
>
> **- Global Head, Business Automation (BFSI)**

Source: Zinnov Analysis, Primary Research and Expert Interviews

Case Study | Professional Services GCC validated AI adoption depth and impact by leveraging a workforce platform for A/B testing[1]

Problem Statement

- A leading Professional Services GCC's SDLC team was experiencing mounting productivity bottlenecks
  - App development team faced productivity bottlenecks in SDLC activities
  - Repetitive application switches and manual interventions increased the cycle time
  - Leadership was uncertain if AI could reduce effort and accelerate time to completion

Adopted Approach

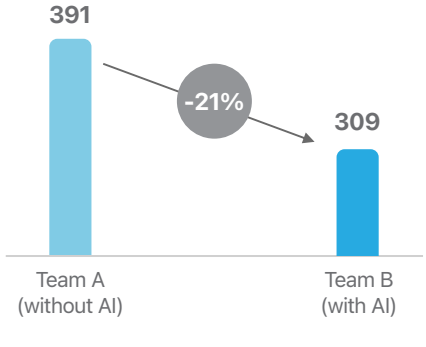
- **Controlled Comparison Setup**
  - Two-team model: Team A operated without AI, while Team B operated with AI tools across matched workstreams for **8 weeks**
  - Shared backlog, sprint cadence, and definition of completion to ensure like-for-like comparison
- **Embedding Usage Depth**
  - AI tools were introduced across **12 SDLC activities**, with targeted emphasis on manual workflows and repeated activities
  - Employees from team B were trained and incentivized to actively embed AI into daily operations
- **Measurement-led Visibility**
  - A **workforce productivity tool** tracked application switching, cycle time and work output, measuring adoption depth
  - Insights from the productivity tool were used to improve AI usage patterns and ensure consistency

Impact / Outcomes

Team B witnessed a sustained impact of AI across multiple activities

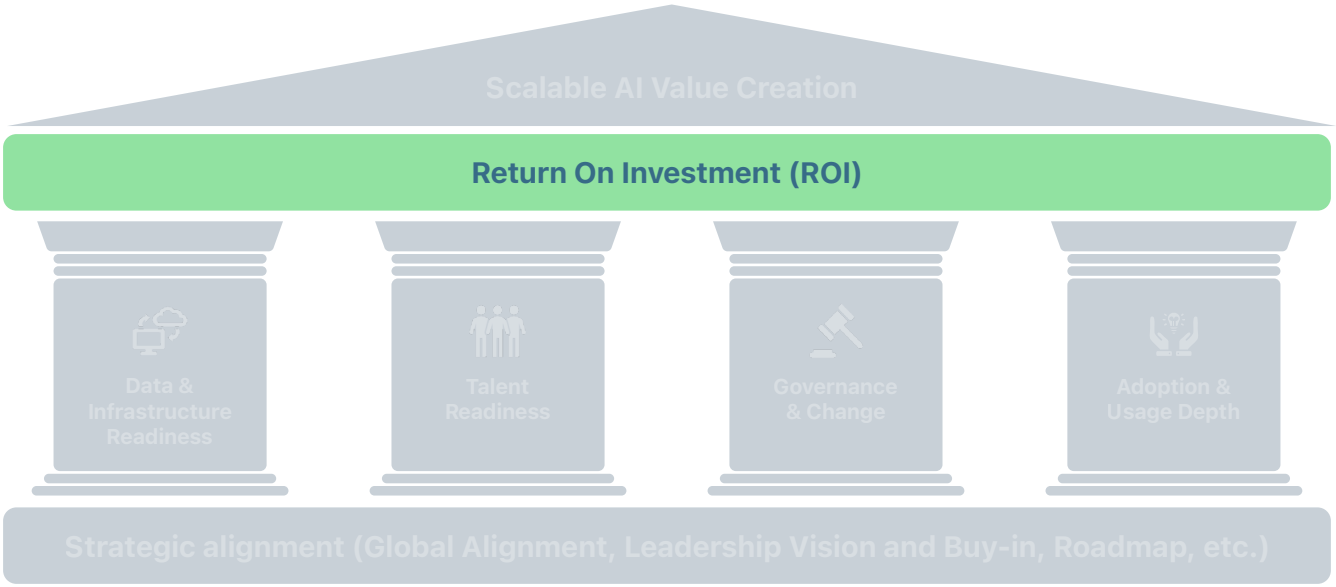
- **~1,100 fewer app switches** (~13%), lowering context-switch fatigue
- **~80 hours saved (~21%)** across 12 activities over the 8 weeks
- **8 of the 12 activities showed reduced effort**, validating adoption beyond pilots

Reduction in Total Time (in Hrs.)[2]



Note: 1. A controlled experiment in which Team A performs a given task without AI and Team B performs the same task with AI. Any differences in outcomes can be attributed to the use of AI. 2. The time spent by Team A (391 hrs.) and Team B (309 hrs.) corresponds to 12 SDLC activities completed over 8 weeks.
Source: Zinnov Analysis, ProHance platform data, Primary Research and Expert Interviews

The ROI crisis: GCC are scaling AI without structured ROI frameworks



92%

Piloting or scaling AI across use-cases

- Adoption has moved beyond pilots; early deployments are underway.
- AI is being embedded into day-to-day workflows
- Momentum spans multiple functions and business processes

72%

Lack a structured ROI framework

- Outcome metrics and baselines are missing or inconsistent
- Costs and value attribution remain unclear
- A recent MIT study[1] found 95% of GenAI pilots fail to deliver ROI
- As a result, many AI investments are justified on promise, not evidence

This disconnect creates a blind spot: Without baselines, metrics and hard evidence, leaders cannot scale what truly delivers impact, or stop what doesn't

ROI is the capstone of scalable AI value creation. It sits above the readiness pillars (data, talent, governance, adoption) and determines whether AI becomes a proven Enterprise enabler or remains a collection of isolated experiments.

Note: 1. The GenAI Divide State Of AI In Business 2025 – A MIT Study
Source: Zinnov Analysis, ProHance platform data, Primary Research and Expert Interviews

ROI measurement fails without baselines, outcome metrics, and cost alignment, leaving AI value overstated or invisible

Despite scaling AI, most GCCs face recurring pitfalls when it comes to proving ROI. These challenges cluster into three failure modes we repeatedly observed.

Data, Measurement, and Baseline

- Without robust baselines, improvements cannot be attributed to AI
- Many GCCs fail to capture the right operational and business metrics from the start, leading to inconsistent measurement
- Metrics skew towards uptime and usage (operational), while business outcomes like growth, risk reduction, and churn remain under-tracked

Adoption Breadth, Depth and ROI Evaluation

- GCCs often mix up breadth (use case spread) and depth of adoption (workflow integration), leading to an underestimation of Enterprise impact
- ROI outcomes look very different at pilot stage versus when a use case is scaled Enterprise-wide
- Leaders struggle between measuring too early with incomplete data or too late when sunk costs distort judgment

Cost, Value, and Stakeholder Alignment

- ROI measurement often misses costs like data preparation, infrastructure, governance, and failed pilots, while focusing too narrowly on cost savings and neglecting strategic benefits
- The wide variation in ROI across industries makes universal measurement models impractical, complicating efforts to quantify both tangible and intangible impacts
- Lack of a common value definition across teams further amplifies inconsistencies in how AI ROI is measured and reported

> **If organizations can find and implement a systematic methodology to capture ROI from AI initiatives, it will create far more value than just benefit tracking, which is where most are today.**
>
> **- VP, Operations & Strategy (Media)**

Source: Zinnov Analysis, Primary Research and Expert Interviews

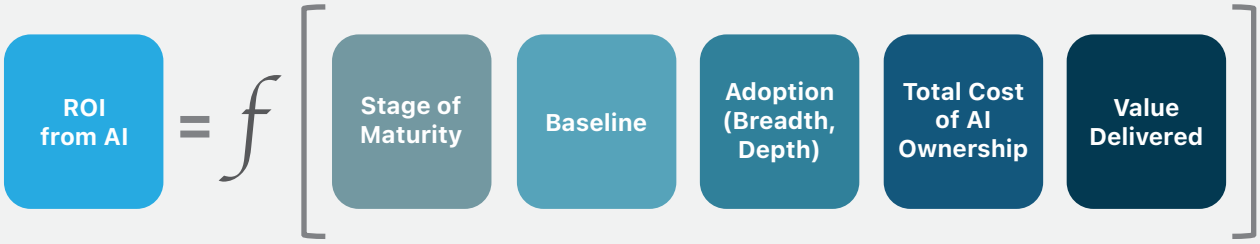
Zinnov's 5-lens ROI framework helps GCCs move from fragmented metrics to Enterprise-wide value proof

To overcome ROI challenges, GCCs need a structured way to measure value beyond fragmented metrics on productivity, cost, CX, and adoption.

The **Zinnov ROI from AI Framework** provides a thinking approach, not a rigid formula, helping leaders evaluate ROI at the use-case level and build credible business cases for Enterprise-wide scaling.

Zinnov ROI from AI Framework

A 5-lens framework to measure (think through) ROI for GCCs



Note: Evaluate ROI by factoring in the stage of maturity of each use case, as it influences baselines, adoption depth, costs, and value delivered

	What it includes?	Why it matters?
Stage of Maturity The evolution of ROI expectations as AI moves from pilots to scaled Enterprise adoption	Identify if the use case is at pilot, scale, or Enterprise integration; since ROI expectations and metrics differ at each stage	Helps align leaders on what ROI means at each stage
Baseline The reference points that make ROI credible and attributable	Before/after metrics, clear attribution (AI vs. process change), governance of measurement	Prevents inflated claims and anchors ROI in evidence
Adoption The degree to which AI is embedded in real workflows and embraced by people	Breadth across teams and depth of integration	Adoption at scale is the bridge between investment and realized ROI
Total Cost of AI Ownership Full lifecycle cost of building, running, and sustaining AI	Direct costs (Infrastructure, licenses), hidden costs (governance, oversight), sunken pilots/experiments, and reuse of prior models/assets	Avoids underestimating costs and helps compare short-term vs. long-term value
Value Delivered The total benefit includes both tangible and intangible value, across internal and external dimensions	Productivity gains, revenue impact, risk/compliance improvements, customer trust, employee satisfaction	Ensures ROI is not seen only as cost savings but as Enterprise-wide value creation

Source: Zinnov Analysis, Primary Research and Expert Interviews

ROI from AI requires baselines, stage-appropriate metrics, and governance that evolves with maturity

Stage of Maturity

AI maturity isn't measured by time but by progress in use case development. Each stage demands distinct metrics, governance, and readiness, with timelines varying by use case, technology stack and organizational context.

How to do it right	Where it fails?
• **Stage 1 – Pilot/PoC:** Limited rollout to test feasibility, capture learnings, set cost expectations and identify reusable assets • **Stage 2 – Scale Phase:** Early ROI signals should be visible, adoption accelerates, business case is validated, costs stabilizes, and governance is strengthened • **Stage 3 – Enterprise Integration:** Prove sustained value, build platforms for reuse, and formalize monitoring and refresh cycles	• Applying Enterprise-level metrics to early pilots • Assuming use cases are linear, when many evolve in parallel • Scaling without clear checkpoints leads to premature expansion and wasted efforts

Leader's checkpoint: Do we know which stage the use case is in, and have explicit gates to move to the next?

Baseline: Visibility Before Value

ROI is credible only when anchored in clear before-and-after baselines with fair attribution. Without this, metrics get inflated, disputed, and lose trust.

How to do it right	Where it fails?
• **Capture baselines** upfront (cycle times, error rates, employee satisfaction, or cost per run) • **Use attribution methods** like A/B testing, matched cohorts[1], or staggered rollouts • **Allow metrics to evolve** from proxies in pilots, to KPIs at scale, to business outcomes at Enterprise level • **Establish governance** with defined owners, review cadence, and clear accountability	• Trying to rebuild baselines after rollout • Focusing on vanity usage metrics such as logged hours instead of outcomes • Allowing multiple data versions create recurring disputes

Leader's checkpoint: Do we have baselines in place before pilots begin, a fair attribution method, and a regular review process with stakeholders involved?

Note: 1. Two like-for-like teams, matched on size, skills, and workload, both use AI on the same tasks. Outcomes from both teams establish a tailored AI baseline.
Source: Zinnov Analysis, Primary Research and Expert Interviews

True ROI comes from genuine workforce adoption and full cost visibility

Adoption (Breadth, Depth)

Adoption is not about the number of licenses issued but about real usage and the ability to scale. ROI is achieved only when AI is integrated into everyday employees' workflows.

How to do it right	Where it fails?

• **Breadth:**
  ▪ Ensure **active use of AI tools** across different roles, **from frontline staff to leadership**
• **Depth:**
  ▪ Design or redesign workflows to seamlessly integrate AI outputs, **ensuring minimal friction with current tools**, and track how many workflows run autonomously on AI, not just assisted by AI
	• Counting licenses instead of measuring active use
	• Assuming pilot success reflects sustained adoption
	• Embedding AI into outdated workflows creates resistance
	• Overlooking middle managers, who act as the real adoption gatekeepers

Leader's checkpoint: Are we tracking genuine workforce-wide usage and deep workflow integration?

Total Cost of AI Ownership (TCOAI)

ROI is not just about spend versus savings. It must reflect the full lifecycle cost of building, running, and sustaining AI.

How to do it right	Where it fails?
• Capture all **direct costs** such as infrastructure, licenses, and partner fees • Account for **hidden costs** including data preparation, training, change management, and oversight • Factor in **risk exposure** such as compliance, hallucinations, resilience issues, and rework • Include the **cost of sunken pilots** or experiments, even if they did not scale successfully • Leverage **reusable assets** such as models, prompts, and connectors to lower unit costs	• Underestimating data, compliance, and change-management costs • Ignoring ongoing operating expenses beyond pilots • Failing to reuse existing AI assets

Leader's checkpoint: Have we listed all cost types upfront, modeled ongoing expenses, and addressed compliance/security overheads?

Source: Zinnov Analysis, Primary Research and Expert Interviews

A balanced and layered view of value delivered is crucial for ROI measurement

Value Delivered

ROI is realized through a balanced view of internal vs. external and tangible vs. intangible outcomes. GCCs should focus and track value across all four dimensions.

	Tangible	Intangible
Internal Facing	• Throughput, SLA adherence, cycle time, cost/transaction, FTE savings, SDLC velocity • Industry example: ▪ **Software:** Mean Time to Resolution (MTTR)	• ESAT, skill uplift, innovation culture, knowledge sharing • Industry example: ▪ **Software:** Employee Net Promoter Score (eNPS)
Customer Facing	• Revenue lift, conversion, churn reduction, faster time-to-market, STP rates • Industry example: ▪ **Retail:** Customer Conversion Rate	• Brand trust, regulator confidence, CX differentiation, loyalty • Industry example: ▪ **BFSI:** Customer Trust Index

Note: Each quadrant should be tailored with relevant industry-specific metrics to reflect what matters most in that sector.

Efficiency Growth Risk/Compliance Experience

How to do it right	Where it fails?
• **Internal–Tangible:** Use efficiency metrics (throughput, SLA, cycle time) to show quick ROI • **Internal–Intangible:** Track ESAT, skills, and innovation culture; link them to retention or productivity • **Customer–Tangible:** Measure business outcomes like revenue lift, conversion, or churn reduction to strengthen the case • **Customer–Intangible:** Capture long-term value through trust, loyalty, and regulatory confidence for sustainable ROI	• Dismissing intangibles as 'nice to have' instead of leading value indicators • Assuming external outcomes without first enabling internal readiness • Reporting outcomes without linking to stage of adoption

Leader's checkpoint: Do we track key metrics from each quadrant, monetize credibly where possible, and align to our adoption stage?

Source: Zinnov Analysis, Primary Research and Expert Interviews

Application of the framework 1 | ER&D GCC: AI coding assistants accelerate ROI as adoption deepens and customer impact compounds

This illustrates how the ROI framework can be applied within the context of a GCC construct: In this case, an Engineering function using an AI coding assistant at scale.

Stage of Maturity

Scale

- Rolled out beyond pilot into multiple teams (6–12 months)
- ROI is visible
- Adoption at 60–65%, governance improving but not yet GCC-wide

Baseline (pre-AI)

200–250	~60	~8–10%	~15%
lines of code/day per developer	Story points / sprints (Project Velocity)	Post-release defect rate	Attrition baseline; Developer satisfaction mixed

Adoption (Scale Stage)

Adoption Breadth
~60–65%
of developers actively using the tool

Adoption Depth

~25–30%	~40-50%
Daily code influenced by AI	Developers trained on AI workflows

Total Cost of AI Ownership

Licensing cost ~USD30–40	Cloud/infra ~USD150–200K	~10–15%
per developer/month	Annually including S3 buckets, LLM tokens, APIs	of program cost for change management, training, governance overhead

Value Delivered

Productivity gain

~8–12%	~5-15%	~5-10%
Uplift in developer output	Increase in story points/ sprint	Fewer post-release defects

Developer ESAT

70–75%	~2–3%
Developers feel more engaged	Attrition avoided[3]

Unified dashboard

- Consolidates data from multiple tools (like Jira)
- Real-time metrics across effort variance[1]

ROI Estimate

~USD 1.2–1.5M	~USD 1.8–2.2M	~1.4–1.6X
Annual cost of program	Annual quantified benefit	Net ROI at scale[2]

Leader Guidance

Proven ROI at scale	Compounds with adoption depth	Customer impact multiplier	Sector-specific levers
Early deployments show credible gains: ~8–12% productivity uplift, 25–30% faster releases	ROI compounds as code, workflows, and teams adopt AI	Faster releases improve CX and retention, the key multiplier for ROI acceleration	Gains vary by domain e.g., release velocity (ER&D), claims turnaround (BFSI), patient experience (Healthcare)

Next stage signal

ROI grows beyond ~1.5X as adoption surpasses 60–65%, governance is institutionalized, and downstream customer impact (CX, retention, quality) starts compounding

Note: The figures in this case study are illustrative and are provided only to demonstrate the application of the ROI framework in a GCC construct and should not be interpreted as specific organizational outcomes. 1. Effort variance measures the difference between the planned (budgeted) effort for a project and the actual effort. 2. This reflects Enterprise-level ROI, not vendor pilot ROI claims, which often cite 3–5x. 3. Helped in saving 15–30% of a new hire's annual salary.
Source: Zinnov Analysis, Primary Research and Expert Interviews

Application of the framework 2 | Healthcare GCC: ROI in Revenue Cycle Management (RCM) adjudication at pilot stage

This illustrates how the ROI framework can be applied within the context of a GCC construct: A Healthcare GCC applying AI in RCM claims adjudication at the pilot stage.

Stage of Maturity	**Pilot**	• Limited to denial management only (narrow scope) • Initial ROI visible in throughput, turnaround, and compliance metrics • Human-in-loop still required for all adjudication decisions • Governance structures and upskilling only beginning to stabilize				
Baseline	**~30–40** Claims/hour/ agent	**~8–12%** Claim denial (varies by specialty)	**10–15 days** Average Turnaround	**~15-20%** Rework due to errors	**~2-3%** Compliance misses (HIPAA/PHI)	**~16–20%** Attrition in claims ops roles
Adoption (Pilot Stage)	**~10–15%** Breadth: Claims routed via agentic AI	**~20–25%** Depth: Tasks by AI (extraction, code map, fraud detect)	**100%** Adjudication decisions require human sign-off	**~30-35%** Basic AI upskilling completion		
Total Cost of AI Ownership	**~USD50–60** License cost/FTE/month	**~USD100–150K** Data curation upfront cost	**~USD150–200K** Pilot build & Infrastructure costs	**+25–30%** Ongoing ops, compliance & change management costs		
Value Delivered	**+5–8%** Denial detection accuracy	**~10–12%** per agent productivity / efficiency gain	**~8–10%** Rework reduced	**~10–15%** Compliance: PHI exposure cut	**2–3%** Lower attrition impact	
ROI Estimate	**~USD 0.9–1.2M** Cost	**~USD 1.1–1.4M** Benefit	**~1.2–1.4x** Net ROI			

Leader Guidance

Foothold ROI	Compounding	Customer impact	Compliance ROI
Early gains are real but modest (throughput, turnaround, compliance)	ROI grows as reusable modules extend across adjudication sub-processes	Faster closures drive improved Days Sales Outstanding (DSO), cash flow, and satisfaction	Reduced PHI exposure, lower audit and fine risks

Next stage signal	Moving beyond denial increases ROI from ~1.3X to significantly higher multiples

Note: The figures in this case study are illustrative and are provided only to demonstrate the application of the ROI framework in a GCC construct and should not be interpreted as specific organizational outcomes.
Source: Zinnov Analysis, Primary Research and Expert Interviews

4

PATHWAYS TO SCALABLE AI VALUE

What GCCs must remember from Cloud and RPA waves to scale AI responsibly

Every disruptive technology follows a familiar path: exploration, early adoption, scaling, and institutionalization. The Cloud and RPA waves showed both successes and pitfalls. For GCC leaders, the parallels are clear: the same fundamentals that derailed earlier waves can just as easily accelerate or stall AI.

Below are those lessons and implications for AI:

Stages	Cloud	RPA	Implication for GCCs (AI)
Exploration	**Cautious starts; security**/compliance fears slowed moves	Early hype, very few scaled meaningfully (only **3% scaled beyond 50 bots in initial years**)	Anchor **pilots** in **baselines** and **guardrails**, not hype
Early adoption	Initial PoCs in **non-critical workloads;** Cloud **talent gaps** slowed progress	Most **pilots stayed small (1–10 automations)**, weak Enterprise strategy	Use **AI pilots** to **validate ROI**, not just showcase potential
Scaling	Winners (firms that scaled) **invested in governance, FinOps** and **talent; without redesign**, lift-and-shift cloud moves under-delivered	**30–50%** of **projects failed** due to poor process fit and governance; only ~**1/4 had Enterprise-wide scaling** strategies	Reinvest **AI learnings** into **governance, data** foundations, and **talent** for sustainable scale
Institutionalization	Now **Enterprise backbone; hybrid/multi-cloud normalized; cost** discipline remains critical	Normalized into **targeted automation** and evolved into **hyper automation** alongside AI/ML	GCCs must embed AI as a **repeatable, Enterprise-wide capability** and not one-off wins

Scaling the AI Wave

GCCs unlock scalable value by continuously reinvesting in stronger data foundations, governance, and talent, then scaled across the Enterprise, creating a compounding loop of efficiency, innovation, and growth

Source: Zinnov Analysis, Primary Research and Expert Interviews, Secondary Research (NASSCOM, BCG, EY, Deloitte, Gartner, McKinsey)

Conclusion

AI has reached a decisive moment for GCCs. Like Cloud and RPA before it, this wave brings both promise and pitfalls; but it is unfolding at unprecedented speed. Leaders today face a common challenge: **ROI remains the unresolved question.**

Our research and leader conversations confirm that success will not come from isolated wins or over-indexing on a single pillar. Instead, ROI clarity requires a holistic approach: measuring rigorously, balancing across the four readiness pillars, and scaling with discipline.

Key Takeaways for GCC Leaders:

- **Measure early and often:**
  Set baselines and define ROI logic upfront; avoid hype-driven pilots
- **Balance the pillars:**
  ROI demands alignment of data readiness, talent, governance, and adoption depth.
- **Account for the real costs:**
  Include infra, hidden costs (data prep, governance, change), and risk exposure
- **Track tangible and intangible value:**
  Look beyond efficiency to growth, compliance, and employee/customer experience
- **Make AI repeatable:**
  Treat AI as an Enterprise-wide capability, not as one-off pilots

There is **no universal blueprint, and perhaps there never will be.** Each GCC must navigate its own sector, context, leadership, and Enterprise priorities.

But one truth is clear: **ROI clarity from AI will define the winners.** Those who measure early, prove value at scale, and compound impact with adoption depth will lead the next wave of Enterprise transformation.

The story of AI in GCCs is still unfolding. We will continue to track progress, share sharper perspectives with the community, and refine this lens. To explore how these strategies can apply to your context, and to begin unlocking structured ROI from AI, connect with us at info@zinnov.com.

5

NOTES TO READERS

Glossary

Definitions

Terminology	Definition
AI/GenAI	Artificial intelligence focused on generating content such as text, software code, images, audio, or video using large pre-trained foundation models. These systems are designed to produce original outputs in response to natural language prompts
GCC	A GCC is an offshore or nearshore entity fully owned and operated by a parent company. These centers provide specialized services, ranging from IT and R&D to complex back-office functions. GCCs play a pivotal role in driving innovation, enhancing cost efficiency, and accessing diverse global talent pools at optimal cost

Roles of GCC for Enterprises

Orchestrators	GCCs act as strategic partners by co-owning Enterprise AI roadmaps. They ensure alignment between global priorities and local execution, bridging Enterprise vision with operational delivery
Incubators	GCCs serve as innovation engines by experimenting with new AI ideas, evolving them into scalable business solutions, and codifying success into global playbooks and blueprints
Stewards	GCCs take ownership of enabling long-term AI adoption by building workforce skills, driving digital fluency, and embedding governance frameworks to ensure ethical and scalable delivery

ABBREVIATIONS

Abbreviation	Description
AI	Artificial Intelligence
AI CoE	Artificial Intelligence Center of Excellence
AMAs	Ask Me Anything
AML	Anti-Money Laundering
API	Application Programming Interface
BFSI	Banking, Financial Services, and Insurance
BPO	Business Process Outsourcing
CPG	Consumer Packaged Goods
CX	Customer Experience
DSO	Days Sales Outstanding
EHR	Electronic Health Record
ESAT	Employee Satisfaction
FinOps	Financial Operations
FTE	Full-Time Equivalent
GCC	Global Capability Centers
GDPR	General Data Protection Regulation
GenAI	Generative Artificial Intelligence
GPU	Graphics Processing Unit
HIPAA	Health Insurance Portability and Accountability Act
IP	Intellectual Property

Abbreviation	Description
KPI	Key Performance Indicator
L&D	Learning and Development
LLM	Large Language Model
ML	Machine Learning
MLOps	Machine Learning Operations
MTTR	Mean Time To Resolution
NLU	Natural Language Understanding
NPS	Net Promoter Score
PHI	Protected Health Information
PoC	Proof of Concept
R&D	Research & Development
RACI	Responsible, Accountable, Consulted, Informed
RCM	Revenue Cycle Management
ROI	Return On Investment
RPA	Robotic Process Automation
SDLC	Software Development Life Cycle
SLA	Service Level Agreement
SME	Subject Matter Expert
SOP	Standard Operating Procedure
STP	Straight Through Processing

Methodology

This whitepaper was co-developed by Zinnov and ProHance, grounded in rigorous research to capture how GCCs in India are navigating AI adoption and unlocking ROI from AI.

Our multi-pronged approach combined primary research, proprietary data, and industry benchmarks to ensure a balanced view of leader priorities and workforce realities.

This report analyzes the following –

- AI adoption journey of GCCs across Data, Infrastructure, Talent, Governance, and Change readiness
- Adoption challenges and the role of visibility, measurement, and governance in scaling pilots to Enterprise-wide value
- Best practices from GCC leaders to scale AI responsibly and prove ROI

Data Aggregation

- Zinnov benchmarks on AI maturity, GCC roles, and ROI frameworks, contextualized for India's GCC ecosystem
- ProHance workforce analytics data capturing productivity patterns, adoption depth, and usage visibility across AI-infused workflows

Primary Research

- 160+ survey responses across leaders and employees to capture both boardroom and frontline perspectives
- 50+ hours of in-depth interviews with GCC leaders across industries (CXOs, Country Heads, Site Heads, VPs, Senior Directors)

Secondary Research

- Financial Express
- Forbes
- NASSCOM
- MIT (Massachusetts Institute of Technology)
- Times of India
- Draup
- Business Standard
- Livemint
- Economic Times
- Industry Reports
- Company websites

ACKNOWLEDGEMENTS

This whitepaper reflects the collective wisdom of our partners, industry leaders, and the GCC community. Their contributions grounded our research in reality, highlighted lessons from past transformations, and illuminated pathways to scalable value from AI.

We extend our gratitude to the GCC leaders, practitioners, and experts who generously shared their experiences and perspectives. Their openness has enriched this study with practical insights into the opportunities and challenges of scaling AI responsibly.

We are especially thankful to our partners at ProHance, whose expertise in productivity measurement and workforce analytics provided invaluable inputs to the ROI narrative, sharpening the practical relevance of this whitepaper.

Special appreciation goes to the Zinnov team, whose rigor and commitment ensured this paper brought together diverse perspectives into a clear, actionable narrative for GCC leaders.

Finally, we acknowledge the broader GCC ecosystem, whose continued experimentation and innovation inspire us. We hope this whitepaper, strengthened by these contributions, empowers GCC leaders to scale AI with discipline and confidence, unlocking sustainable Enterprise value in the years ahead.

AUTHORS & CONTRIBUTORS

Namita Adavi
Partner
Zinnov

Saurabh Sharma
Chief Operating Officer
ProHance

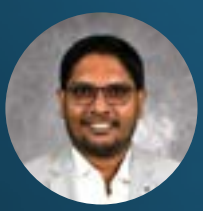
Dipanwita Ghosh
Principal
Zinnov

Piyush Gupta
SVP - Head
Research & Innovation
ProHance

Sa'ad Shaikh
Engagement Manager
Zinnov

Sridhar Kumar
Head
Professional Services
ProHance

Aniket Banerjee
Project Lead
Zinnov



Gangadharan
Consultant
Zinnov

ABOUT PROHANCE

Data is the backbone of modern workforce management. As Enterprises embrace AI and innovation, many CXOs encounter a black hole—investment is accelerating, yet visibility into adoption, effectiveness, and measurable business impact remains elusive. Leaders require real-time intelligence on how AI is impacting productivity, performance, and the workforce's ability to adapt to rapidly evolving business and market dynamics.

ProHance is a global leader in Enterprise operations enablement and workforce analytics, empowering 400,000+ users across 36 countries. Purpose-built for today's digital and hybrid work environments, ProHance provides executive leaders with deep, real-time visibility into workflows, capacity, and productivity by enabling GCCs and global Enterprises to embed AI into their strategic roadmaps with confidence. With a strong focus on security and compliance, the platform equips GCCs to scale AI adoption, unlock sustainable ROI, and accelerate Enterprise-wide transformation.

ProHance delivers ROI in 3-12 months of deployment

- **15-30%** Time Efficiency
- **15-20%** Productivity
- **5-10%** Profitability
- **50-75%** Overtime Costs

Key Highlights

- **400,000+** Licenses
- **200+** Customers
- **36** Countries
- **96%** Renewal Rate
- **46** Net Promoter Score
- **84 Mn+** Hours of Capacity Created/year

For more information, log onto: www.prohance.net

ABOUT ZINNOV

Founded in 2002, Zinnov is a global management and strategy consulting firm, with presence in New York, Santa Clara, Houston, Seattle, Bangalore, Gurgaon, Hyderabad, Pune, London and Paris. Over the past 23 years, Zinnov has successfully consulted with over 250+ Fortune 500 Enterprises to develop actionable insights to help them accelerate their technology journeys to create value – across dimensions of revenue, transformation, and optimization. With core expertise in Digital Engineering Talent, Digital Transformation, Innovation, and Outsourcing Advisory, Zinnov assists clients by:

- Enabling global companies to design, build, transform, and scale their global engineering talent footprint through center setups and accelerators – in an as-a-service model, as well as optimizing their global portfolios, to achieve higher R&D efficiencies, innovation, and productivity;

- Providing full suite of M&A advisory offerings including buy-side and sell-side M&A advisory, advising global PE firms in asset shortlisting and target evaluation, commercial due diligence, and value creation including global footprint accretion;

- Growing revenue for companies' products and services in newer markets through account intelligence, market entry, and market expansion advisory;

- Helping global companies outline and drive their open innovation programs, design and operate accelerator programs, and enable collaboration with start-ups across specific use cases and predefined outcomes;

- Structuring and implementing Digital Transformation levers enabled by technologies like AI/ML, Intelligent Automation, Cloud, IOT, etc.

With their team of experienced consultants, subject matter experts, and research professionals, Zinnov serves clients from across multiple industry verticals including Enterprise Software, BFSI, Healthcare, Automotive, Retail, and Telecom in the US, Europe, Japan, and India. For more information, visit **http://www.zinnov.com.**

PROHANCE zinnov