



The Experience Layer is Broken: Why Enterprise AI Needs OneOffice

HFS WEBINAR | ONEOFFICE IN THE SERVICES-AS-SOFTWARE™ ERA

Saurabh Gupta

President, HFS Research

Melissa Fersht

Executive Research Leader, HFS Research

JUNE 25, 2026

Welcome & housekeeping

Thank you for joining us today!

Important notes:



All participants are automatically muted by the webinar administrator.



There will be a Q&A session following the presentation. Please feel free to send your question(s) at any time using the chat feature.



This webinar will be recorded and posted on the HFS webinars page. We'll also email you the recording once it's ready.

Today's agenda

What you'll learn

1

Why customer experience remains broken in many AI-enabled enterprises

2

The growing employee experience velocity gap and its impact on transformation

3

Why HFS' OneOffice is provides a blueprint for tying experiences to business outcomes

4

How the experience layer is evolving in the age of agentic AI

5

Practical actions to align technology investment with customer and employee outcomes

6

Real-world examples of enterprises turning AI investment into measurable value

Why HFS?

We Don't Follow the Narrative. We Create It.











HFS shaping the narrative

- **RPA (2012–13)**
Pioneered the definition and adoption of robotic process automation
- **As-a-Service Economy (2014)**
Shift from traditional outsourcing to plug-and-play, outcome-based services
- ★ ○ **Digital OneOffice (2016)**
Unified front-to-back operations driven by data, automation, and customer-centricity
- **Generative Business Services™ (GBS) (2023)**
Using generative and agentic AI to transform business operations into intelligent, adaptive systems that continuously create value
- ★ ○ **Services-as-Software™ (2024)**
The convergence of services and software into scalable, IP-led solutions
- **AI-First Deal Labs (2025)**
Smarter. Faster. Future-proof deals for the AI era.

The session today is backed by the HFS Enterprise Mandate Index, built on 500K+ data points

Enterprise Mandate Index
Explore enterprise buyer sentiment across ~500,000 data points

 Emerging Technology & AI 546 questions	 Strategy & Business Priorities 234 questions	 BPO & Outsourcing 312 questions	 IT Services & Technology Platforms 417 questions
 Talent & Workforce 272 questions	 Industry-Specific Insights 446 questions	 Customer & Employee Experience 103 questions	 Governance Risk & Compliance 447 questions

🌟 **Agentic and GenAI Compass** BETA

Instant AI answers, powered by HFS Research

what are the top 10 agentic AI use cases for improving Customer Experience?

The HFS Enterprise Mandate Index is a live read on where enterprise priorities and investment are actually flowing based on interviews and surveys with over 12K+ enterprise leaders with 500K+ data points with new data points added monthly.

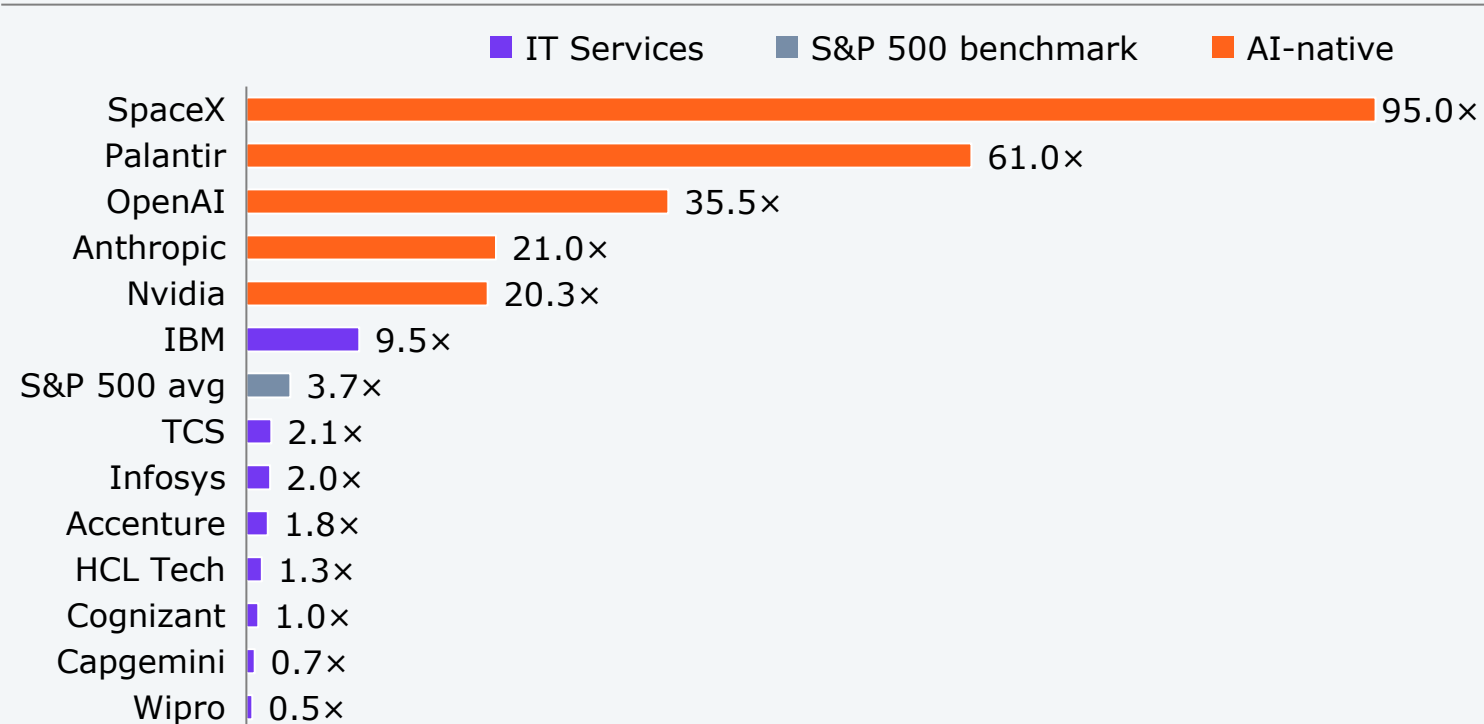
The HFS Agentic & GenAI Compass is a searchable library of 1,800+ real-world AI deployments, with analyst-verified outcomes.

Check out the HFS Data Intelligence Suite [here](#)

Emergence of Services-as-Software™ is a category creation moment

Legacy services are losing market cap. AI-natives command PSRs of 20–100×

Price-to-Sales Ratio (PSR) by company
(sorted in ascending order)



It services average PSR

~1.5x

Below S&P 500 avg. The market is pricing these firms as if they have no role in the AI economy.

AI-native average PSR

~46x

Priced for a future of mass enterprise AI adoption — which requires the firms trading at 1.5x to actually deliver it.

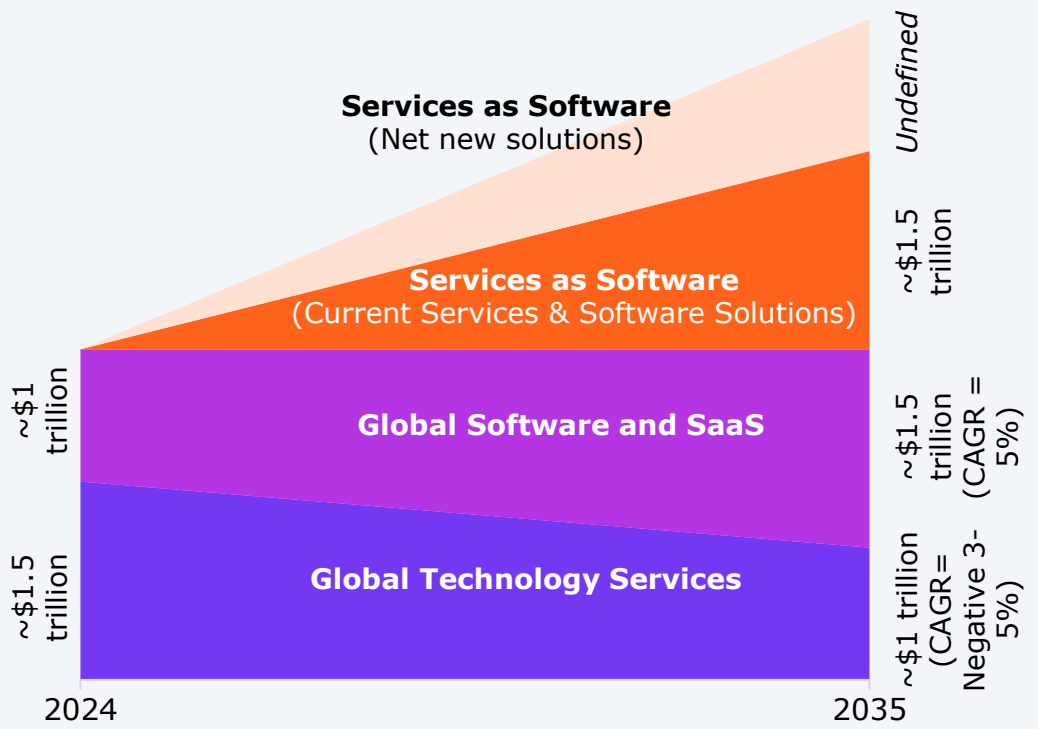
Sources: HFS Research analysis based on publicly announced stats in June 2026. Anthropic and OpenAI PSRs based on latest funding round valuations vs annualised revenue run rates. SpaceX PSR based on IPO valuation of \$1.77T vs 2025 revenue of \$18.7B. Private company PSRs are indicative.

HFS called this. A \$1.5 trillion services-as-software market by 2035

Current market forecast for Software and Services (Excluding Services as Software)
HFS estimates



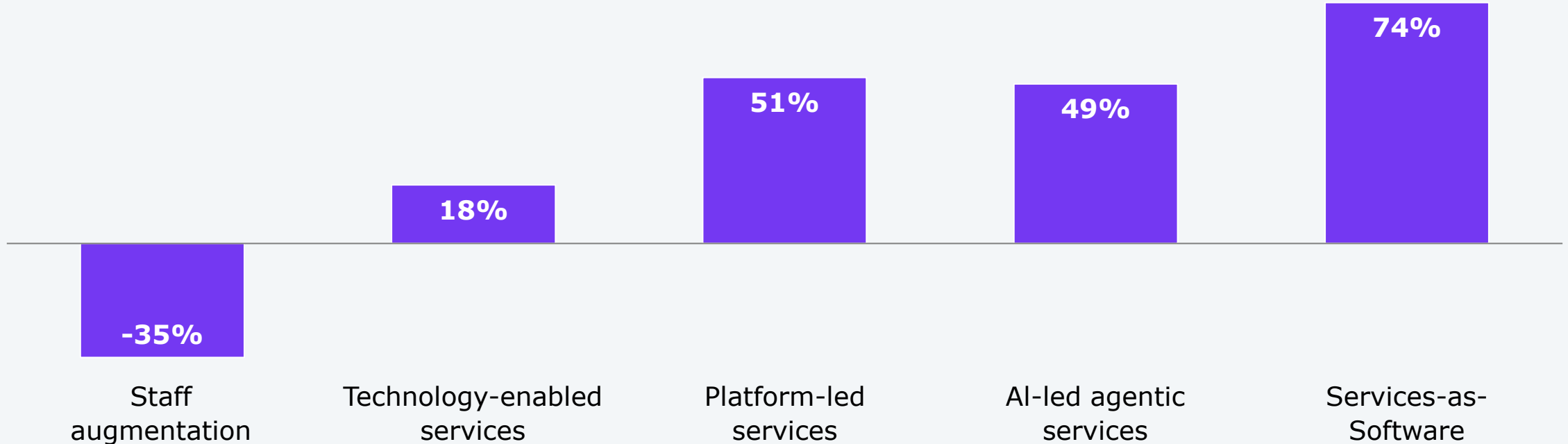
Projected market forecast for Software and Services (Including Services as Software)
HFS estimates



Source: HFS Research, 2026

IT and business leaders want to displace labor-based outsourcing with AI-powered services

Please indicate if your organization's service models will increase, decrease, or stay the same over time?
(Difference between percentage of respondents who believe the model will increase versus decrease)



Sample: 608 IT and business leaders across Global 2000 enterprises
Source: HFS Research, 2026

Despite the promise, enterprise AI adoption is struggling with nearly \$18T of unresolved enterprise debts

Enterprise AI Adoption is experimental

13%

of enterprises have actually reached AI maturity. The other 87% are still experimenting

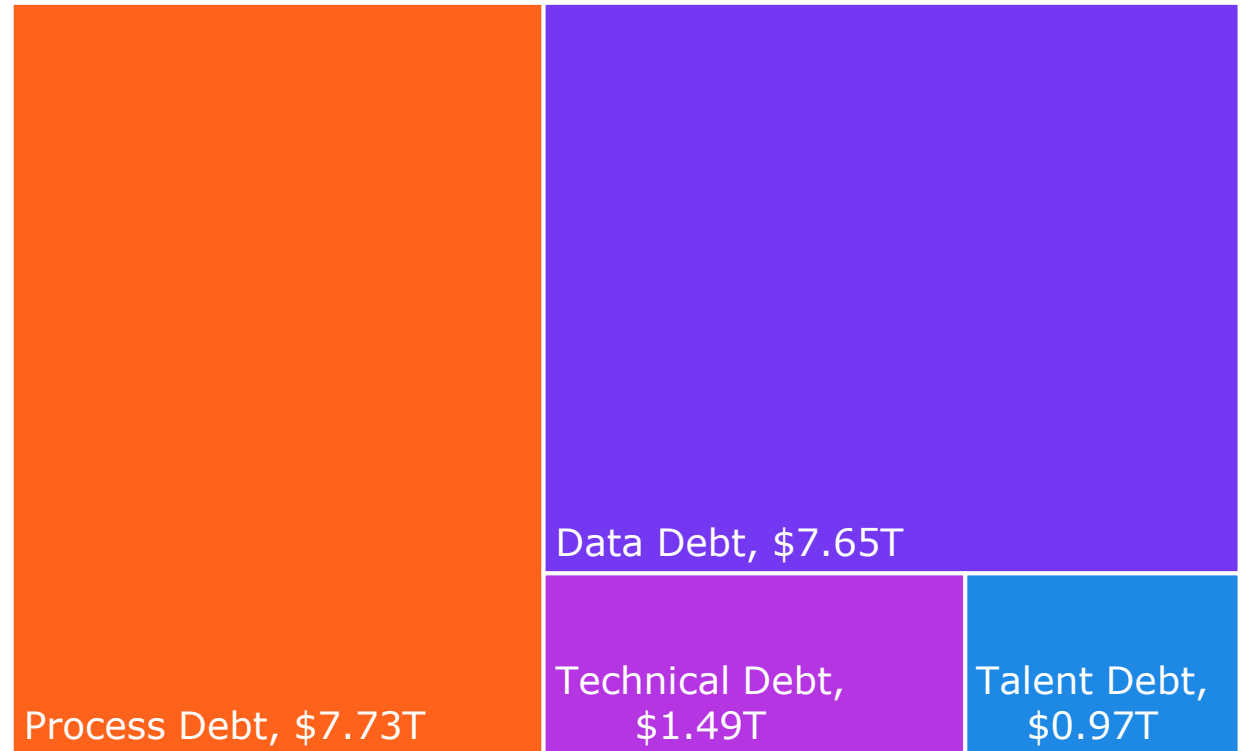


86%

of leaders have no real AI strategy in place



Estimated Enterprise Debts across the G2000 enterprises

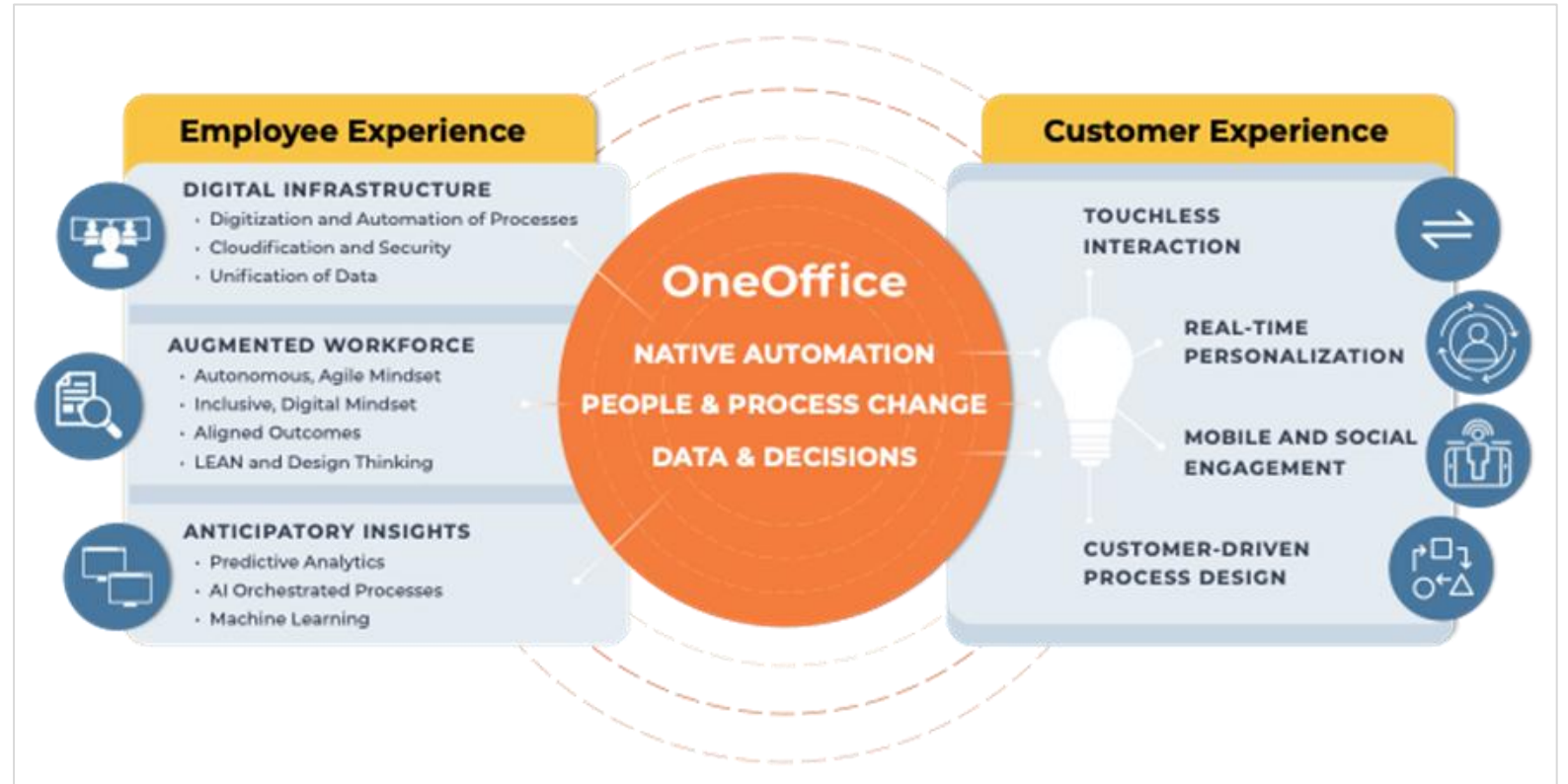
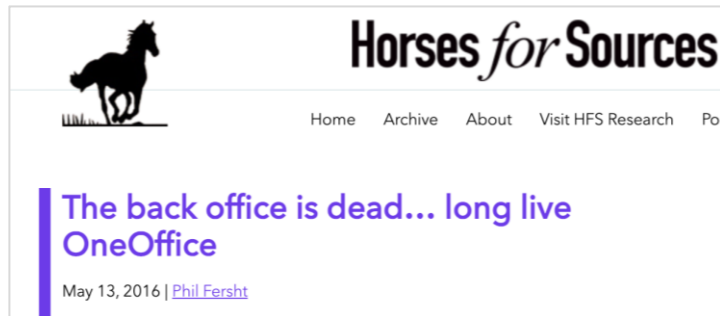


Sample: 505 AI Decision Makers across Global 2000 enterprises
Source: HFS Research, 2026

Sample: 2,002 global enterprise executives
Source: HFS Research in partnership with Genpact, 2026

**The problem is not the AI.
It's a 2010 operating model
trying to capture 2026 value**

We coined OneOffice back in 2016



“The Digital OneOffice is where the front, middle and back offices will cease to exist, as they will be, simply, *OneOffice*.”

OneOffice is more vital now in the SaaS era than ever before

AI removes the human buffer



- Humans used to absorb broken handoffs and siloed data by improvising
- AI agents don't patch, they execute
- Every dysfunction people were quietly fixing now surfaces directly as a customer or employee failure

The front-to-back split becomes untenable



- Agents act across front, middle and back office in real time
- An operating model that treats those as separate ownership zones breaks immediately
- You need one accountable layer, not three hand-offs

The technology



- In a SaaS world you buy outcomes, not effort
- "Business asked for it and IT built it" is no longer defensible
- Someone must own the result; OneOffice names that owner

AI deflation hits inside your walls too



- The repricing hitting the services industry is coming for internal IT and operations
- The organisations left behind are those whose operating models couldn't absorb the transition
- OneOffice helps you survive it

HFS OneOffice, the re-imagined operating model for Services-as-Software™



First, a gut check from the room

How well are customer and employee experiences aligned to your organization's business outcomes?

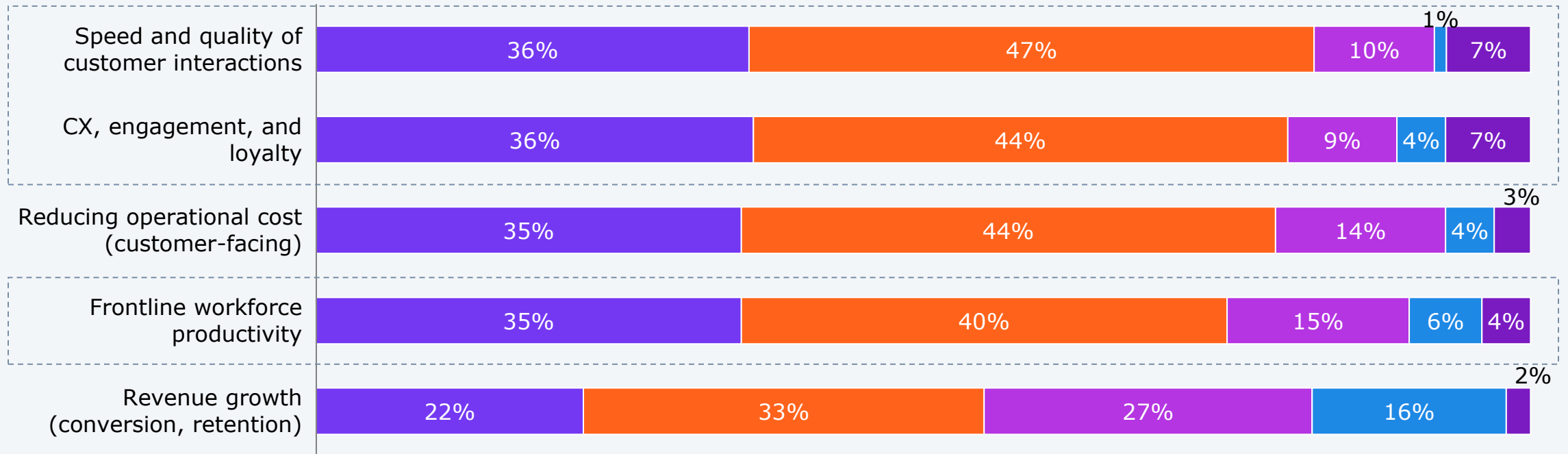
- A** Highly aligned — experience is a strategic KPI and measured consistently
- B** Mostly aligned — some functions work together, but gaps remain
- C** Poorly aligned — experiences and business objectives are often disconnected
- D** Not aligned — teams optimize separately and outcomes suffer

Drop your answers in the poll

**The experience layer must
be re-imagined for the
services-as-software era**

80%+ enterprises expect AI to deliver high impact on their CX and EX

Rate the expected impact of AI on the following



Sample size: n = 101 senior enterprise leaders, North America
Source: HFS Research, June 2026

The promise of AI's impact on customer and employee experience is great

Top 10 Agentic AI Use Cases: CX & EX

Customer experience

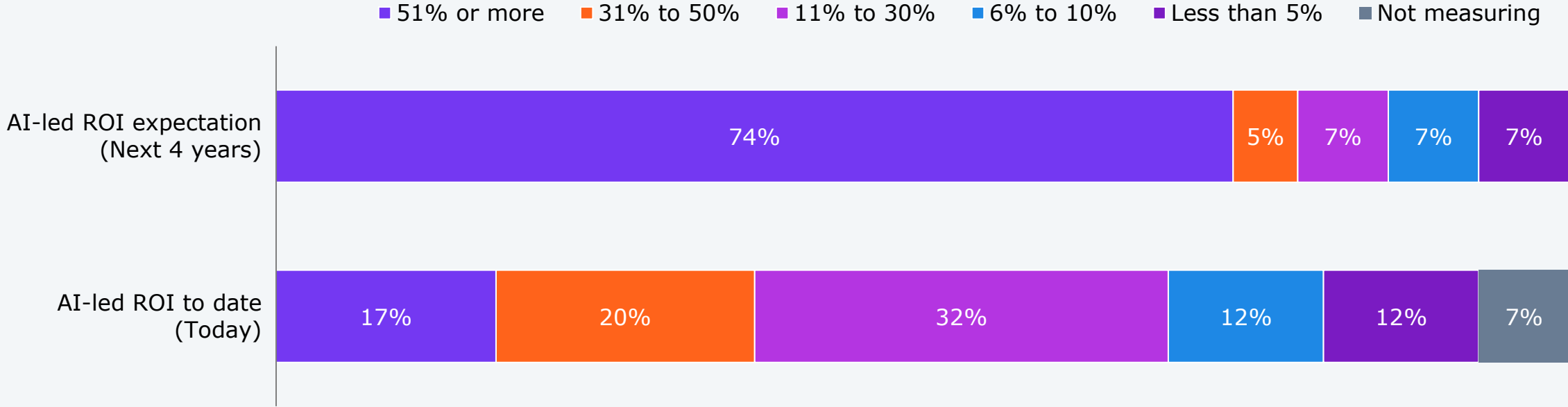
01	02	03	04	05
Autonomous Resolution	Proactive Churn Intervention	Hyper-Personalized Offers	Proactive Issue Remediation	Intelligent Support Routing
Full inquiry lifecycle — auth, diagnosis, resolution — with multi-agent orchestration executing real transactions.	Monitors engagement signals and triggers personalized retention offers before customers disengage.	Ingests CRM/CDP data to generate targeted campaigns and time-sensitive promotions without manual input.	Monitors shipments and service events — notifies or intervenes on behalf of customers before issues escalate.	Prioritizes and routes requests dynamically by customer value, SLA urgency, and complexity in real time.
Outcomes				
Faster resolution, fewer escalations	Higher retention, more lifetime value	Higher conversion, stronger revenue	Fewer complaints, higher trust	Faster response, better SLA compliance

Employee experience

01	02	03	04	05
IT Helpdesk Automation	Self-Service Provisioning	Incident Triage & SRE Support	Developer Productivity Agents	Knowledge Capture & Docs
Employees resolve device, access, and app issues directly via conversational agents — no waiting for human agents.	Agents provision environments, accounts, and access rights on behalf of employees, eliminating wait queues.	Correlates alerts, surfaces remediation playbooks, and auto-fixes low-risk incidents — cutting on-call burnout.	Agent squads handle code generation, review, testing, and legacy migration — cutting repetitive toil from engineering.	Converts tacit knowledge and legacy runbooks into structured, searchable artifacts — reducing onboarding friction.
Outcomes				
Less friction, faster issue resolution	Faster onboarding, less downtime	Reduced burnout, faster resolution	Less toil, faster development cycles	Faster onboarding, less bottleneck

Enterprises expect 50%+ ROI from CX AI. We are nowhere near it

For the Customer experience (chatbots, virtual agents), please specify what is AI-led ROI to date and expectation.



Sample size: n = 59
Source: HFS Research, 2026

...CX is broken
...EX is broken.
And they are
inextricably linked.

AI doesn't fix
broken experiences.
It amplifies them.



Scene 1

The customer who already told you three times

Monday

She explained the whole problem to a chat agent: account number, what went wrong, what she needed. The agent was sympathetic and said they'd escalate it

Wednesday

She called customer support and started to explain again. No record of Monday's call. So she explained it all over again.

Friday

Third agent. No record of Wednesday either.

Saturday

She stopped calling. She posted about it instead.

40,000 people saw her post that Saturday.

No one owned her experience end to end.

CX designed the journey and IT built the system. Neither owned the gap between them.

Scene 2

The manager who quit

- He was one of the best operations managers in the company. Consistent high performer running a team of 22.
- In 2024 he bought his own AI subscription. Evenings spent prepping his week, summarizing his team's reports, drafting board updates. He got faster, sharper and started to love the job again.
- Then Monday came back. The approved tool sat behind a 14-step approval. The one his team had couldn't reach the CRM. IT policy blocked the model he actually used. His request to pilot something better sat in a queue for four months.
- He left in March.

"I didn't want to go backwards."

— his exit interview, March

Why is CX broken? A tangled web of leadership debt

It's not just a front office problem. CX breaks underneath; where data, processes and ownership are fragmented. AI bolted on top just makes the cracks more visible.

Siloed data, no single view

Every channel knows a different version of the customer; none knows the whole person.



The org chart leaks through

Hand-offs between teams become friction the customer feels — repeating themselves at every step.



AI bolted onto broken processes

Automation on top of fragmented journeys amplifies the mess instead of fixing it.



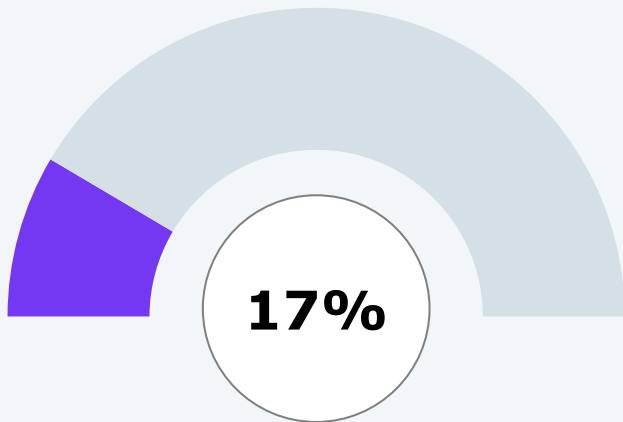
Measured on cost, not outcomes

Optimized for handle time and deflection — not resolution, trust or empathy.

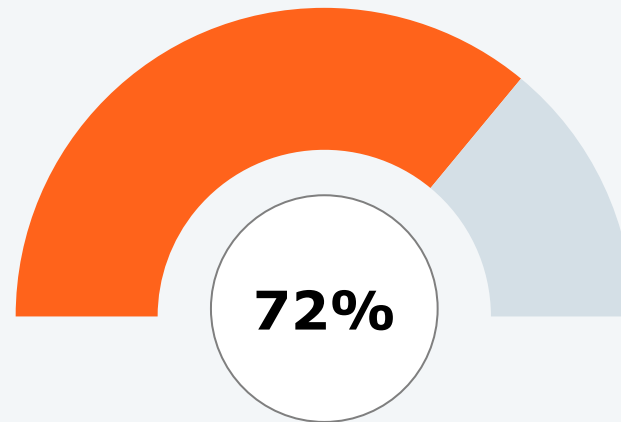


Source: HFS Research, Horizons: Data Modernization and AI, 2026.

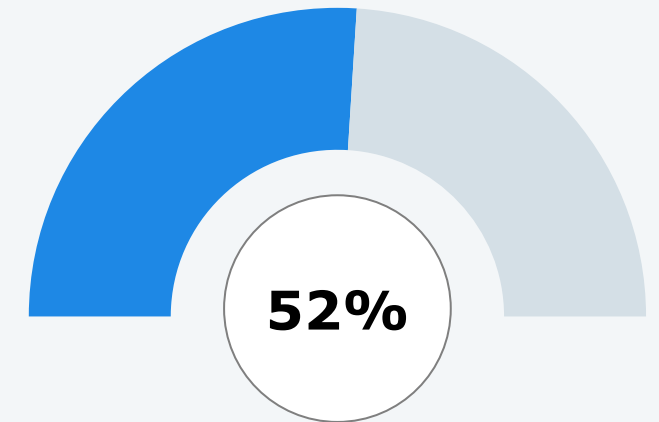
Why is EX broken? Employees are terrified of using AI at work



feel safe
experimenting
with AI



fear being
judged if their AI
experiments fail



don't feel safe
trying new
things with AI

Sample: 505 AI Decision Makers across Global 2000 enterprises, HFS Research 2026

The AI Velocity Gap

What your people can do on Sunday. What your enterprise can do on Monday.

Individual Advantage

(Sunday experience)

- **Zero Friction Adoption.** Connect your Gmail, calendar, OpenTable. No IT approvals needed.
- **Tolerance for Imperfection.** If AI screws up, you fix it yourself. Stakes are manageable.
- **Immediate ROI.** Save time on routine tasks today. No business case required.
- **Rapid Experimentation.** Test, iterate, and adopt what works. No pilot purgatory.



Enterprise Barriers

(Monday experience)

- **Siloed Systems.** Data stuck in Salesforce, SAP, and ServiceNow. No unified access.
- **Tribal Knowledge.** Workflows live in email chains, not documented processes.
- **Compliance Paralysis.** Security teams debate ChatGPT while agents need system access.
- **Governance Vacuum.** Who's liable? How to audit? "Trust infrastructure" doesn't exist.

Your best employees are already AI-augmented...
While your enterprise is forming committees

The pitfalls

When AI done wrong erodes customer and employee trust

AIR CANADA 

Hallucinating chatbots lead to legal implications

2024

Klarna.

From "AI does it all" back to hiring people

2025



Pilot pulled after errors like runaway nuggets

2024



**From pathetic,
to the proof in
the pudding ...**



Three enterprises, one OneOffice playbook

Business outcomes delivered through joined-up CX, data and IT — across three very different industries.

Reimagining the contact center

Global investment management firm

50%

Reduction in total cost of operations

- 93%** AI-voice CSAT
- 82%** Less customer hold time
- 7%** More annual digital sales

OneOffice: Support joined to supply chain & order management — outcomes via IT orchestration.

Analytics-driven care

Major US healthcare organization

15%

Lower volume of complaints

- 7%** Fewer repeat callers
- 5%** CSAT improvement
- 1** Unified member data hub

OneOffice: Data orchestration is what makes proactive, low-friction CX possible at all.

Service transformation

Trust-led service operation

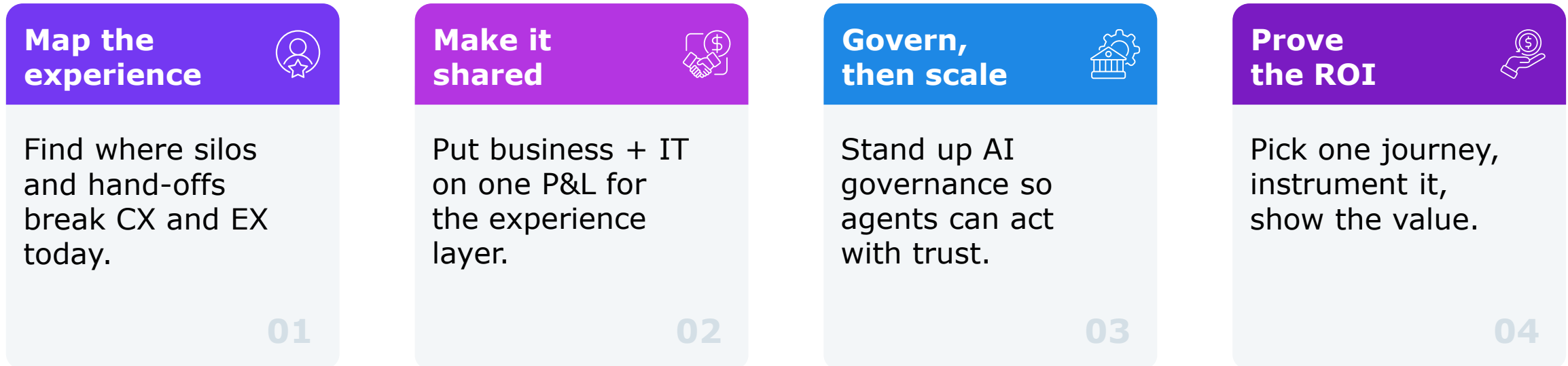
\$191M

Annualized operational savings

- +25** NPS point increase
- +300K** Service requests deflected
- 32%** Faster time to solution

OneOffice: The ROI the 'did all the AI stuff' enterprise never saw — the layer was joined up.

The OneOffice difference



Future success isn't more AI for efficiency. It's a OneOffice where experiences, operations and intelligence work as one.

What is next, and what to do this week

Agentic commerce, the next frontier of the experience layer

When your customer is an agent: the rapid rise of agentic commerce

Increasingly the buyer isn't a person. It's an AI agent shopping, booking and paying on their behalf. Your experience layer now has to be machine-grade.

~20%

of global orders during Cyber Week 2025 were influenced by AI agents or shopping assistants



10–20%

of US e-commerce could be agent-driven by 2030



~\$7.7B

Agentic-commerce market in 2026, up from ~\$5.7B in 2025



1M+

Shopify merchants already opted into ai-agent checkout



The standards for agent transactions are arriving fast: OpenAI's Agentic Commerce Protocol (with Stripe) and Google's Agent Payments Protocol (AP2) bring cryptographic, auditable, revocable mandates. Agentic commerce is very much an ecosystem play; the bottleneck is operating models, data and governance, not the tech.

OneOffice takeaway: If a customer's agent can't transact with you cleanly, your front-end AI is irrelevant. The experience layer must be owned by business AND IT.

Sources: Salesforce; Morgan Stanley; Grand View Research; Shopify / OpenAI. Third-party forecasts shown for context.

Key takeaways

01

AI doesn't fix broken experiences. It amplifies them

02

Only 1 in 10 enterprises can scale agentic AI. The AI is ready. Your 2010 operating model isn't.

03

CX and EX are failing for the same reason: nobody owns the outcome end to end.

04

Business and IT have never shared accountability for the experience layer. That gap is now a strategic risk.

05

OneOffice closes that gap: shared accountability, joint governance, AI agents working across the whole enterprise, and a continuous loop that improves with every outcome.

06

Your next customer may be an AI agent. Is your experience layer ready for that?

07

OneOffice was relevant in 2016. In the Services-as-Software era, it's existential.

About HFS

- **INNOVATIVE**
- **INTREPID**
- **BOLD**

HFS Research is a leading global research and advisory firm helping Fortune 500 companies through IT and business transformation with bold insights and actionable strategies.

With an unmatched platform to reach, advise, and influence Global 2000 executives, we empower organizations to make decisive technology and service choices. Backed by fearless research and an impartial outside perspective, our insights give you the edge to stay ahead.



www.hfsresearch.com



[hfsresearch](https://www.linkedin.com/company/hfsresearch)



www.horsesforsources.com



www.horsesmouthpodcast.com