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Gen AI amplified

Scaling productivity for healthcare providers

About the authors

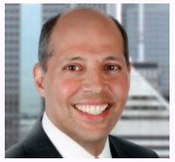
Tejash Shah

M.D., Managing Director
Accenture Global Health
Global Lead, Care Reinvention

tej.shah@accenture.com

Tej is a physician leader in Accenture's Global Healthcare practice working with clients to harmonize humans and technology to increase access to care and improve the healthcare experience for patients and providers. With a background in both technology and healthcare, his mission is to rebuild the relationship between the patient and provider using generative AI and other tools to improve productivity and address the workforce shortage. Tej's strategic vision and data-driven insights drive success for numerous global healthcare organizations who seek to transform operations, drive higher efficiency and improve patient outcomes. His expertise in responsible AI practices, data governance, and cybersecurity is crucial in addressing the ethical and security concerns that often hinder the adoption of gen AI in healthcare.

Previously, Tej worked in roles spanning management consulting, corporate strategy, and product management. He built and led several businesses and innovation teams as an intrapreneur founder at two multinationals. He also created the healthcare investment thesis and led investments in several health technology startups for the venture arm of a large global consumer electronics company. Tej is often called upon to offer his expertise on care reinvention and the workforce challenge. Tej earned his M.D. from Albert Einstein College, and his M.A. in Economics from Boston University.



Kaveh Safavi

M.D., JD Senior Managing Director
Accenture Global Health

kaveh.t.safavi@accenture.com

Kaveh is a seasoned global healthcare industry leader and doctor who helps providers, health insurers, and public and private health systems harness the promise of technology and human ingenuity to humanize healthcare. His deep understanding of the challenges facing the healthcare industry, particularly the workforce and rising operational costs, makes him uniquely qualified to speak on the transformative potential of generative AI. In more than 14 years with Accenture, he has led multiple initiatives to improve patient care and clinician efficiency. Prior to joining Accenture, Kaveh led Cisco's global healthcare practice, was chief medical officer of Thomson Reuters' health business, vice president of medical affairs at United Healthcare, and had leadership roles at HealthSpring and Humana. A highly sought-after speaker, he has published numerous papers and is often interviewed and quoted, most recently on using gen AI to address the workforce shortage in health.

He earned an M.D. from Loyola University School of Medicine and a J.D. from DePaul University College of Law. He is board-certified in internal medicine and pediatrics and completed his medical residency at the University of Michigan Medical Center. An adjunct lecturer of Health Enterprise Management at Kellogg School of Management-Northwestern University, Dr. Safavi also serves on the Weinberg College of Arts and Sciences' Board of Visitors–Northwestern University, is a member of the Easterseals National Board of Directors and is a lifelong Chicagoan.

Daniel Owczarski

Health Industry Lead
Accenture Research

daniel.owczarski@accenture.com

Dan has been the Accenture Industry Research Lead (IRL) for Health for 11 years. He leads a team of researchers that support Accenture's Health practice globally. The team is focused on developing Thought Leadership, managing and leveraging our data driven licenses and assets, and supporting client work. Dan's background includes 20 years in healthcare research for management consulting firms and Wall Street.

What if you could increase your organization's productivity by 50%, giving clinicians thousands of hours back to focus on patient care?

What if you could boost morale, reduce burnout and curb attrition with tools tailored to clinician workflows?

What if you could transform your operations, driving higher efficiency and better patient outcomes?

Executive summary

Healthcare providers are at a critical inflection point. Amid rising demand from an aging population, escalating operational costs and a worsening workforce crisis, the industry's sustainability is under threat. The statistics are telling: The US alone will face a shortage of 54,000 to 139,000 physicians by 2033, while the global nursing shortfall could reach 13 million by then.[1] These staffing constraints will push costs higher, compromise patient access and quality of care and, ultimately, further strain the financial health of healthcare providers. Given the global nature of this problem, the industry won't be able to hire or train its way out of this difficult and complex challenge with multiple angles.

The good news? Emerging technologies such as generative AI (gen AI) can scale human capacity and give clinicians valuable time back for patient care. Gen AI will dramatically reshape traditional job functions and create new opportunities for innovation and growth, according to the **CISCO-led AI-Enabled Workforce Consortium** of which Accenture is part of. It will do this in large part by automating routine tasks, enhancing data analysis and enabling advanced problem-solving capabilities.[2]

Our recent survey of 300 US-based C-suite healthcare executives from provider organizations shows boosting employee efficiency is a top priority for 83%. These leaders are well aware of gen AI's game-changing potential in this area: Over three in four (77%) senior healthcare executives hope gen AI will deliver productivity gains that directly contribute to revenue growth not just reduce costs.

"Eighty-three percent of healthcare executives are piloting gen AI in pre-production environments, but fewer than 10% are investing in the infrastructure necessary to support enterprise-wide deployment."

However, significant gaps exist between awareness and execution: 83% of healthcare executives are piloting gen AI in pre-production environments, but fewer than 10% are investing in the infrastructure necessary to support enterprise-wide deployment. This underinvestment, combined with the healthcare industry's hyper cautious approach, is constraining gen AI adoption to fragmented pilots. The absence of a holistic strategy places healthcare organizations at a disadvantage against more agile competitors — and puts the entire industry at risk of falling behind sectors that are already reaping substantial gains from scaled adoption of gen AI. One automobile manufacturer used a gen AI platform to accelerate the transformation of intricate data into real-time insights boosting productivity by 30%. A global financial services company is on its way to reducing costs by half, delivering IT services 20% faster, freeing employees for strategic initiatives and enhancing customer service because of gen AI. The wider this healthcare gap grows, the longer it will take to catch up.

This report provides healthcare leaders with a roadmap to systematically move from pilots to enterprise-scale gen AI deployment. We draw on comprehensive research, insights and real-world case studies to present four critical steps for effectively scaling gen AI and guiding leaders through this transition:

01 Build a reinvention-ready digital core

Scaling gen AI requires a robust digital infrastructure. Healthcare providers need to prioritize cloud integration, data accessibility and governance to support organization-wide AI capabilities. Without this digital backbone, gen AI initiatives will remain limited in reach and impact.

02 Strengthen data quality and strategy

High-quality, centralized data is a prerequisite for reliable gen AI output. A robust data foundation enhances predictive analytics, empowering healthcare providers to effectively use gen AI for clinical and operational use cases (e.g., clinical documentation and staffing optimization).

03 Prioritize responsible and secure AI deployment

As gen AI's role in healthcare grows, securing data privacy and ensuring responsible AI use are more important than ever. A strong AI governance framework safeguards sensitive information and builds trust amongst administrators, providers and patients in AI-driven decision-making.

04 Forge strategic partnerships to accelerate innovation

In-house resources alone cannot drive scaled gen AI. Strategic collaborations with technology leaders, academic institutions and service providers offer essential expertise, support and the agility to stay at the forefront of gen AI advancements.

Healthcare leaders who act decisively on a holistic gen AI strategy will be able to fully harness the technology's potential. With material improvements in productivity, clinical capacity and patient outcomes, they will gain an edge over competitors and define the sector's evolution over the next decade.

The healthcare workforce crisis

What makes the healthcare crisis particularly hard to navigate is that the workforce is shrinking just as demand is surging. In the US alone, nearly 900,000 registered nurses (almost one-fifth of 4.5 million) are expected to leave the profession by 2027.[3] This attrition comes at a time when the number of 60–90-year-olds — the top utilizers of healthcare services — is set to grow by 45% over the next two decades, reaching nearly 78 million according to Accenture research in **Reinventing Care Delivery to Solve the Clinician Shortage**.[4] The widening demand-supply gap is already stretching clinicians thin, leading to chronic fatigue, burnout and declining work satisfaction.

This labor shortage is part of a broader continuum of interconnected challenges that ultimately impact care quality and patient outcomes. What begins as a staffing shortfall soon evolves into an expense problem as labor costs escalate, prompting heavy reliance on temporary staffing solutions. This financial strain impacts service quality and limits patient access. When unfilled beds reduce throughput, it becomes a revenue issue, putting further pressure on already tight budgets. Over time, the challenges compound — longer wait times, deferred treatments and declining care standards erode patient trust and as seen in the UK, can even escalate into political crises.

The perception of the crisis may differ from provider to provider, as our conversations revealed, but the underlying challenges are the same. In the face of this urgency, inaction will have serious implications for healthcare providers. They need to deploy innovative solutions at scale to break this cycle of cascading effects and build a more resilient future.

The promise of gen AI

Gen AI holds the potential to turn this vision into reality by addressing healthcare's most pressing challenge, giving time back to caregivers so they can do the work that only humans can do. Large Language Models allow technology to take over writing tasks like end-of-visit clinical documentation, reading tasks such as note summarization and inbox management, giving clinician's minutes to hours back that can be reclaimed for themselves or repurposed for more patient access.

Seventy percent of healthcare workers' tasks could be reinvented through technology augmentation or automation, according to Accenture analysis.[5] In nursing alone, automation can free up 20% of repetitive, lower-complexity tasks, unlocking nearly $50 billion in potential annual value in the US.[6] These advancements aren't about replacing human skills but augmenting them through a collaboration of technology and human ingenuity. Technology also paves the way for innovative care models, enabling clinicians to work in new configurations and environments and focus on what matters most — delivering high-quality patient care.

Scaling gen AI beyond pilots

Staying in pilot mode comes at a cost, as limited-scale trials prevent providers from achieving significant productivity gains and streamlined workflows. Small-scale gen AI initiatives lack the cohesive data integration, measurable cost savings and enhanced care experiences that organization-wide adoption delivers. This piecemeal approach — coupled with a focus on careful deliberation — places healthcare at a disadvantage against nimbler industries like retail and finance, which have rapidly scaled AI to drive productivity, enhance customer engagement and achieve financial resilience.

Healthcare's conservative approach to technology compounds the challenge. Only half of IT executives in healthcare report strong alignment between technology initiatives and overall business strategy, leading to poor conversion of funded gen AI pilots into enterprise-wide deployments. Further, while 60% of healthcare executives expect returns on gen AI investments within 12 months, 95% anticipate only moderate impact over the next five years due to insufficient infrastructure, according to our survey. This underinvestment puts healthcare organizations at risk of falling further behind — both in meeting the growing demand for care and in keeping pace with competitors who integrate technology and strategy seamlessly.

Gen AI's transformative potential can only be realized when the entire C-suite — from board members to CEOs — shares a unified vision and embeds it into organizational strategy. A lack of such alignment is evident in healthcare's under-prioritization of high-impact applications like call centers. Only 3% of healthcare executives see call centers and customer service as major areas for gen AI transformation, in sharp contrast to other sectors in which these are priority areas. Bringing gen AI into call centers could increase worker capacity by as much as 30%, according to Accenture research.[7]

A leading US healthcare system exemplifies this potential. By implementing gen AI-driven call center operations, they cut patient wait times and improved resolution rates on first calls — enhancing both agent performance and patient satisfaction without compromising data security. Such outcomes highlight gen AI's ability to improve operational performance, but isolated examples won't drive the systemic change healthcare needs.

A cross-industry analysis by Accenture in **Work, Workforce Workers – Reinvented in the age of generative AI**, reveals that scaling gen AI responsibly could unlock over $10.3 trillion in additional global economic value by 2038, transforming sectors and value chains.[8]

The stakes are clear. Eighty-three percent of healthcare executives see higher employee efficiency as gen AI's biggest opportunity, while 77% expect productivity gains to directly drive revenue growth rather than merely reduce costs. (Figure 1 and 2) For healthcare leaders, the time to act is now. Scaling gen AI to meet growing patient needs, support clinical staff and maintain financial health — means seizing the opportunity to become industry frontrunners.

US Provider C-Suite Executives: Biggest Opportunities and Outcomes from Gen AI

Figure 1: What do you consider the biggest opportunities for GenAI in your organization?

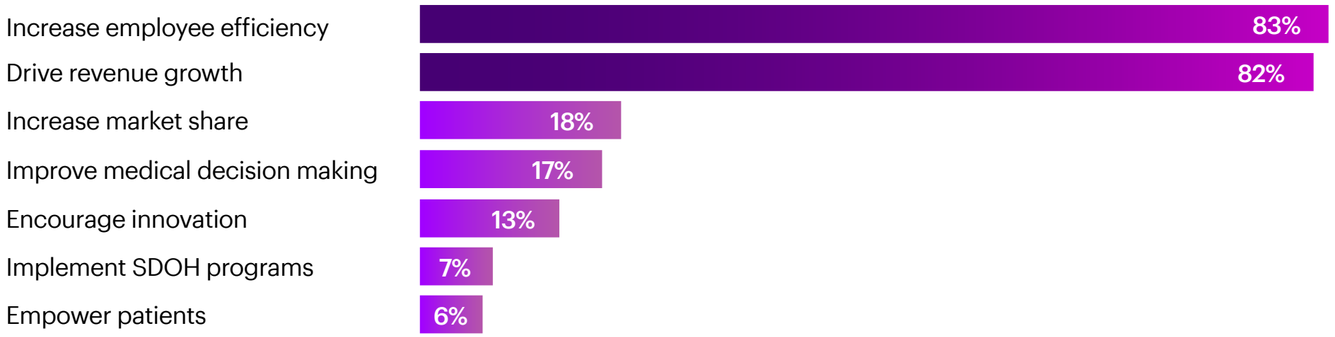
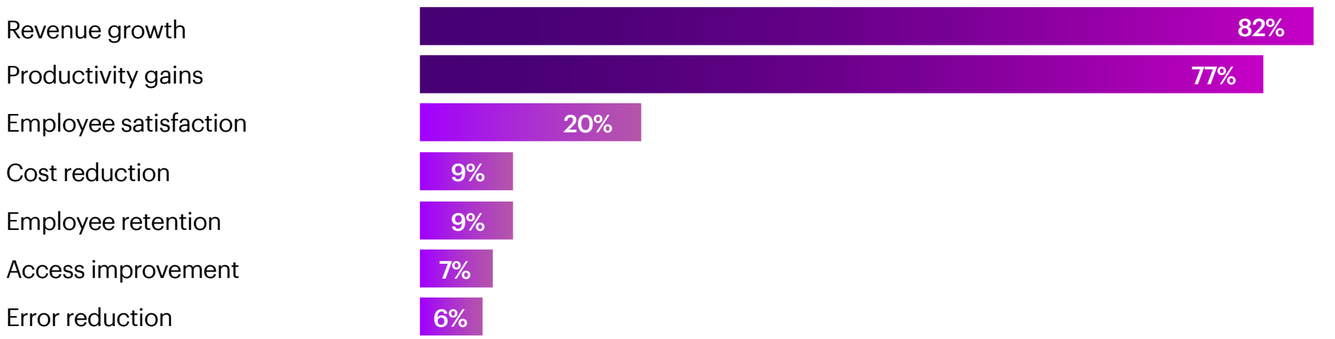


Figure 2: Which of the following outcomes do you anticipate will be most positively impacted by the implementation of GenAI tools in your workforce?



The path to reinvention starts here

Using generative AI is a prerequisite for reinvention success.

Success will require every CEO and their team to assess where they are today in their competitive set, and then systematically execute a **reinvention strategy** with five imperatives. (Figure 3)

But how can providers get there?

In the following section, we lay out four key steps designed to help healthcare leaders transition from pilot projects to impactful, organization-wide adoption.

Five imperatives for a reinvention strategy

Figure 3

01

Lead with value

Shift the focus from siloed use cases to prioritizing business capabailities across the entire value chain, based on an objective assessment of the business case, enterprise readiness and the corresponding return on investment.

02

Understand and develop an AI-enabled, secure digital core

Invest in technology that runs seamlessly and allows for continuous creation of new capabilities.

03

Reinvent talent and ways of working

Set and guide a vision for how to reinvent work, reshape the workforce and prepare workers for a generative AI world.

04

Close the gap on responsible AI

Design, deploy and use AI to drive value while mitigating risks.

05

Drive continuous reinvention

Because change is constant, reinvention never ends. Make the ability to change a core competency and part of company culture.

Action 1:

Build a reinvention-ready digital core.

To scale gen AI effectively, healthcare providers need to first build a strong digital foundation. This "**digital core**" is the essential technological capability that integrates advanced digital platforms, a seamless data and AI backbone and a secure, cloud-first digital foundation.

Healthcare providers with industry-leading digital core capabilities expect to reinvent twice as many functions with gen AI over the next three years and create twice as much value compared to those without this foundation according to Accenture research in **Reinventing with a digital core-Chapter 1: How to accelerate growth through change.**[9] However, only 10% of the healthcare providers we surveyed are actively investing in the integrated technology capabilities needed to fully scale gen AI. Leaders should prioritize initiatives and technology investments such as enhancing data quality, democratizing data access, migrating to the cloud and building robust data governance frameworks. These actions will create a flexible and adaptive digital core, ready to support emerging technologies.

A strong, reinvention-ready digital core is a prerequisite for high-growth organizations as it seamlessly adapts to emerging technologies like gen AI.

Action 2:

Strengthen data quality and strategy.

The success of the digital core, and gen AI in particular, depends on the quality of data and the synergy between people and technology. Data lies at the center of processes like synthesizing information, comprehending natural language and converting unstructured data into structured formats that enable advanced analytics. A solid data foundation also prepares organizations for AI-driven changes.

However, healthcare providers often struggle to effectively cleanse, standardize and integrate their data. These steps are critical to reduce bias and improve the accuracy and reliability of gen AI outputs.

Organizations seeing strong returns on technology investments prioritize centralized data management and data modernization. They ask critical questions such as: Are processes and tools connected across functions to provide shared access to data and analytics? Is the data standardized, secure and easy to use?

When healthcare providers build a data foundation that enables collaboration between people and AI, it streamlines operations and elevates the patient experience.

Action 3:

Prioritize responsible and secure AI deployment.

The rise of generative AI, particularly large language models (LLMs), has amplified the importance of responsible AI practices. Responsible AI requires intentional actions to design, deploy and manage AI systems that create value, build trust and mitigate risks. While earlier responsible AI efforts primarily focused on data bias and algorithm transparency, the widespread use of gen AI has raised the stakes significantly.

LLMs introduce new challenges. As more employees use gen AI tools in their daily work, there's greater risk of unintentionally exposing sensitive organizational data. Publicly available tools, even when used with good intentions, can open doors to confidentiality breaches and privacy violations. Moreover, gen AI's direct interaction with patients presents risks of language toxicity and other unforeseen consequences.

Independent of honest mistakes by well-intentioned employees, the growing number of AI users and applications increases security vulnerabilities. Eighty-five percent of healthcare executives in our survey cite cybersecurity as a major barrier to scaling gen AI, while only 10% recognize underlying technological constraints. Critical concerns include data and intellectual property theft, malicious content creation, targeted high-speed contextual attacks, misuse of gen AI technologies, large-scale misinformation, copyright infringement, plagiarism and amplification of existing biases and discrimination.

> **Leaders acknowledge the importance of responsible AI principles, but there is a gap in their practical implementation — our research shows that only 2% of companies have fully operationalized responsible AI across their organizations.**
>
> **Arnab Chakraborty,**
> Accenture Chief Responsible AI Officer[10]

An organization's readiness to scale gen AI depends on its ability to manage, mitigate and protect against these and related risks. Proactive strategies can minimize downtime and reduce the risks posed by evolving threats and expanding attack surfaces. Continuous monitoring and assessment of technological constraints, data integrity and cybersecurity measures are essential for building resilience and enabling faster, more efficient recovery in the event of an incident. Secure scaling of AI also requires deploying tailored LLMs and developing a workforce skilled in harnessing these tools.

Setting standards for responsible AI

A multinational consumer healthcare organization wanted to define a clear policy and vision to scale responsible AI (RAI) across the enterprise and standardize processes for building and deploying AI. Lacking an inventory of high-risk AI applications and dedicated RAI roles or decision-makers, the company faced significant challenges. Through a global benchmarking project and an assessment of the regulatory landscape, the company drafted comprehensive AI principles, policies and standards. It adopted an RAI operating model informed by risk screening for AI applications, ensuring higher-risk cases align with established principles and regulatory requirements. With an added plan to monitor legislation, the company has strengthened its risk management and accountability and is now confident in its AI usage — so much so that it plans to publish a paper on RAI.

Action 4:

Expand your base of expertise beyond your own people

To build a strong digital foundation, enhance data strategies and integrate AI responsibly, healthcare providers must look beyond internal capabilities. Successfully scaling gen AI often requires specialized expertise that may not exist in-house. Much of this expertise resides within technology innovators, industry specialists and service providers leading advancements in these areas. Strategic partnerships with these ecosystem players bring access to cutting-edge knowledge, close skill gaps and help develop scalable AI solutions.

Our research highlights that organizational misalignment remains a challenge for many healthcare providers. CEOs prioritize hiring additional expertise (60%) as the top strategy for scaling gen AI, while 44% focus on partnerships with external organizations and 33% rely on internal teams. However, the rest of the C-suite — particularly Chief Financial Officers and Chief Information Officers — lean heavily toward hiring expertise rather than partnering externally. This group is also much less optimistic than CEOs about using in-house expertise (7-10%). (Figure 4)

Who will implement Gen AI?

Figure 4: How do you plan to implement GenAI tools within your organization?

Attribute	Chief Executive Officer	Chief Financial Officer	Chief Information Officer	Chief Operating Officer	Chief Strategy Officer	Chief Technology Officer
Hire additional expertise	60%	88%	86%	78%	92%	94%
Partner with external companies	44%	10%	10%	10%	8%	22%
Use exisitng in-house expertise	33%	10%	9%	7%	8%	13%

Increasingly, external influencers are driving transformation across healthcare, helping shape standards and practices that promote innovative approaches. Healthcare providers partnering with academic institutions or leading researchers are already seeing tangible benefits. One such collaboration led to the development of advanced care protocols, resulting in reduced patient recovery times and higher satisfaction rates. This effort also attracted additional funding and support, accelerating innovation and establishing a robust framework for future advancements.

Beyond external partnerships, healthcare organizations need to equip their workforce with new skills to maximize the potential of gen AI. Basic technology literacy is essential to help employees engage with AI tools effectively, while advanced skills — such as crafting precise prompts for LLMs — can significantly improve AI-generated results. Managers will need to evolve their roles to coordinate hybrid workflows, seamlessly integrating human and AI contributions while ensuring efficient task execution.

A collaborative ecosystem for gen AI

A large medical center has built a robust ecosystem of partnerships to advance gen AI in healthcare, collaborating with technology providers, academia, government and industry to drive innovation. Through a strategic alliance with Google, the center leverages powerful computational infrastructure to develop and deploy gen AI models that enhance productivity and automate key administrative tasks such as scheduling, patient record-keeping and billing. Academic partnerships enable the center to integrate gen AI into biomedical research and clinical practice, accelerating discoveries and improving patient care. The center also collaborates with a specialized AI company to create multimodal LLMs that deliver faster, more accurate diagnoses and tailored treatment recommendations. Additionally, partnerships with biopharma's allow the center to incorporate AI-driven tools into clinical trials and diagnostic development, improving patient outcomes and streamlining research efforts. This network of ecosystem partners provides the medical center with access to cutting-edge technology, streamlined operations and enhanced clinical effectiveness.

Automation or augmentation?

By deconstructing jobs into tasks, healthcare organizations can determine which tasks can be fully automated and which can be augmented or assisted by technology while still requiring human expertise.

Recent advancements in gen AI have shown significant potential in automating clinical tasks such as documentation and data interpretation, freeing up valuable time for healthcare providers. For example, about 40% of the healthcare industry's total working hours are devoted to language-based tasks that can be transformed by gen AI: 17% can be fully automated while 23% can be augmented, enhancing the efficiency of human efforts.[11]

LLMs, powered by gen AI, are at the forefront of these changes. These technologies automate language-based tasks that currently consume 10% to 30% of clinical workforce time, according to our Accenture analysis. Primary care teams, for example, can use AI-powered, voice-enabled solutions to automatically document clinician-patient conversations for at least 60% of patient visits. These tools go beyond simple transcription, converting doctor-patient encounters into structured notes, codes and bills — tasks that typically require significant manual effort. This can enable doctors to see up to nine additional patients per month.[12]

In clinical appeals, gen AI can make a material impact: It can now generate written content, validate case details, summarize findings and assist with triage and routing to appropriate teams. The results are tangible: a 70% reduction in handling time for appeals staff (both clinical and non-clinical), a 30% decline in misrouted claims and a 25% decrease in training time for nurses and other clinical staff.

The critical role of clinical leadership

Leaders who understand how work is done are better positioned to set a vision for reinventing roles, reshaping the workforce and preparing teams for a gen AI world. This begins with deconstructing jobs into discrete tasks, determining which should be handled by humans and which can be optimized or automated by technology, and then recombining these tasks to achieve better outcomes.

Our survey reveals a disconnect in leadership perspectives. While 28% of CEOs see themselves as responsible for redefining jobs and roles impacted by gen AI, only 5% of their C-suite peers agree. Instead, 80% of respondents believe the Chief Digital Officer or Chief Digital and Artificial Intelligence Officer (80%) is best positioned to lead this effort.

Interestingly, clinical leadership is rarely seen as central to this transformation. Fewer than 4% of respondents identified the Chief Nursing Officer (CNO) or Chief Medical Officer (CMO) as having any responsibility for gen AI. The only exception is among CEOs, who were more likely than other executives to assign gen AI responsibilities to CMOs (7% versus 1%). This perception overlooks a crucial reality: The labor shortage is most acutely felt by the clinical workforce, particularly nurses. Clinical leaders will play a pivotal role in ensuring that gen AI-driven workflows deliver sustainable value and improved efficiency.

In practice, everyone's involved. The true benefits of gen AI come from fundamentally changing how work gets done, which requires collaboration across leadership levels. Clinical leaders, such as CNOs and CMOs, should play a central role in redefining work models, identifying tasks for automation and empowering staff with tools that simplify their jobs. These efforts will help address the pressures faced by frontline teams and ensure that gen AI-driven solutions enhance care delivery.

Scaling gen AI: A healthcare imperative

Gen AI offers healthcare providers a transformative opportunity to address rising costs, workforce shortages and growing demand. With 83% of healthcare leaders recognizing its ability to enhance financial and competitive standing, and 77% anticipating direct revenue gains, the potential is clear. However, making the leap from pilot programs to organization-wide deployment is critical to realize its value.

Scaling gen AI requires decisive action: investing in a robust digital core, enhancing data strategies, embedding responsible AI practices and forging strategic partnerships. These steps enable healthcare organizations to alleviate operational pressures, empower clinical teams and, ultimately, deliver exceptional patient care.

The time to act is now. Healthcare providers who scale gen AI today will lead the future — setting benchmarks for efficiency, innovation and resilience.

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About the research

Accenture surveyed 300 Health Provider executives in the United States to understand their current attitudes, beliefs, expectations, priorities, and actions related to Generative AI in their organizations and the industry. Executives included CEOs, CFO, COOs, CIOs, CTOs, and Chief Strategy Officers within health providers with at least $1 billion in revenues. Data was collected via an online survey in June 2024. Respondents were anonymized and results were collected, aggregated and reported by our survey partner McGuire Research.

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