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The Cost Of Inaction

Why Leaders Must Modernize IT Infrastructure With Professional Services To Maximize AI Investments

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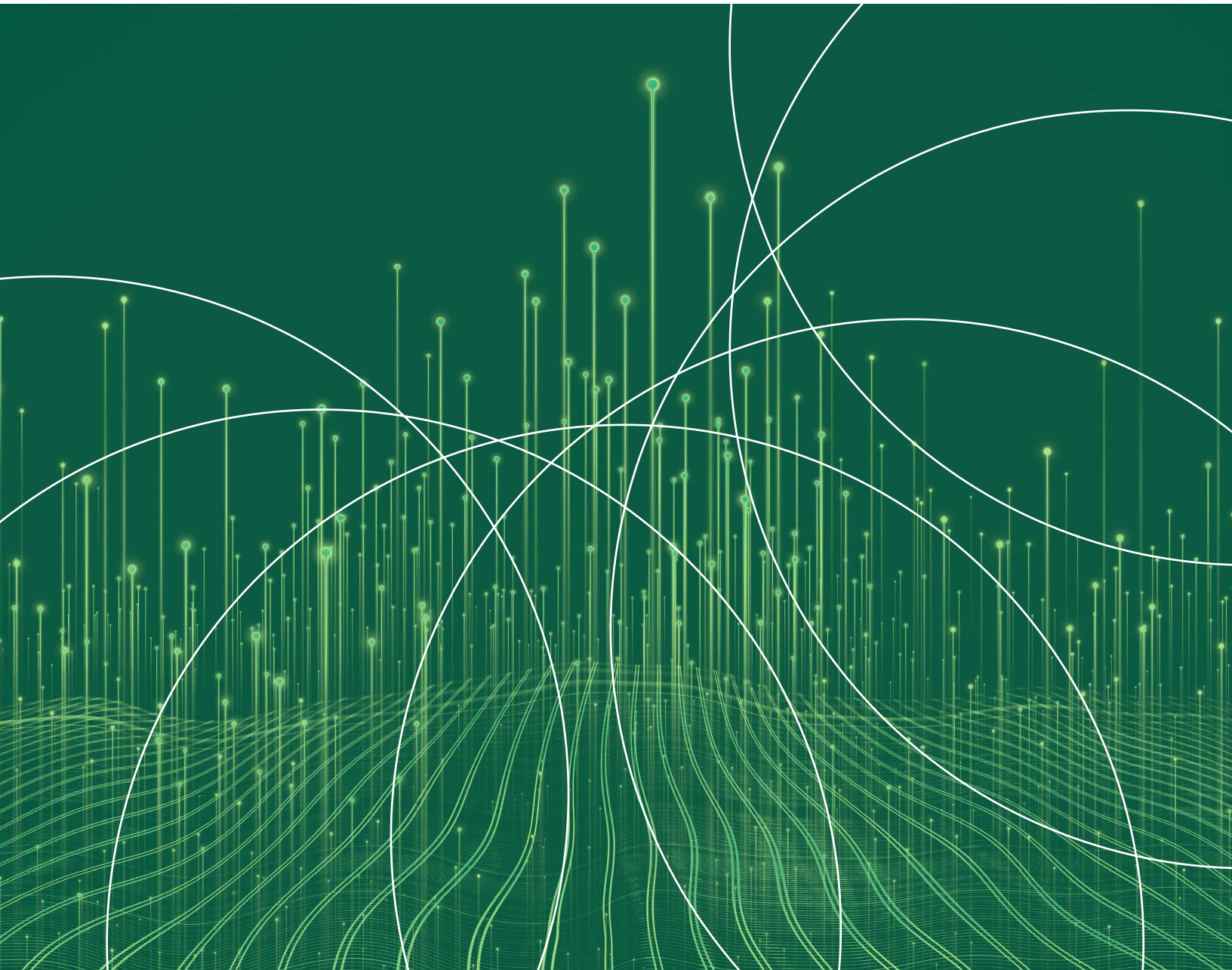


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Executive Summary

AI is rapidly reshaping how organizations operate, compete, and deliver value, but the path from experimentation to long term enterprise impact is not simple. As complexity increases across technology infrastructure and governance, many organizations struggle to translate AI potential into measurable outcomes. Navigating this shift requires more than tools; it demands expert guidance to reduce risk, accelerate adoption, and align AI initiatives with real business outcomes.[1]

Professional services are becoming indispensable for simplifying complexity, reducing risk, and accelerating time to value in the AI era. Organizations that leverage professional services are better positioned to achieve strong operational and business outcomes. To succeed, organizations that quickly adopt the right IT infrastructure, tools, and frameworks will lead the pack, and professional services should help drive that success.

In February 2026, Cisco commissioned Forrester Consulting to assess how enterprises use professional services for IT infrastructure and how emerging AI capabilities are reshaping those needs. Forrester surveyed 718 global IT decision makers responsible for infrastructure related professional services.

We found that AI is opening new paths for modernization and efficiency, prompting many enterprises to seek external expertise to implement, scale, and optimize these technologies. At the same time, expectations for professional services are shifting from productivity based metrics to technology driven outcomes like value realization and risk reduction. As AI increasingly handles repetitive tasks, professional services are evolving toward more strategic, business led functions.



Key Findings

Enterprise leaders are ready to scale AI, but critical capability gaps remain. Enterprises are prioritizing employee enablement and resiliency as core AI outcomes, and 95% of organizations believe their teams are ready to scale AI initiatives. However, they don't feel they have the expertise or tooling to begin or advance their journey.

AI is evolving how enterprises evaluate professional services. Respondents are shifting away from traditional efficiency metrics like time to delivery toward business metrics like value realization, risk reduction, and downstream business impact.

Legacy approaches aren't enough to support and scale modern AI use cases. While respondents are energized to begin or continue their AI adoption journey, they don't have the necessary expertise and capabilities to ensure secure, successful adoption. Digital resilience and the proper infrastructure will be critical to ensure success.

AI adoption and providing a modernized, hybrid workplace start with AI-ready data centers, secure networks, and digital resilience. As organizations strategize how best to support their workforce during times of change, professional services and related AI capabilities can fill in the gaps and ensure improved efficiency and business metrics like eventual improved cost management and reduced time to value.

AI Readiness Is High, But Infrastructure Gaps Persist

Enterprise infrastructure leaders have seen the writing on the wall when it comes to AI. Increases in cybersecurity vulnerabilities and likely breaches behoove leadership to investigate future avenues of investment to protect their proprietary data and ensure resilience. Issues with AI adoption and managing new, challenging levels of process automation have highlighted current expertise and capabilities gaps. As agentic AI becomes embedded across workflows, IT infrastructure resilience, particularly availability and performance, has become mission-critical, as even minor disruptions can cascade across automated systems and halt operations. Enterprise IT decision-makers will increasingly lean on outside support as they expand their AI adoption.[2]



95%

of IT decision-makers surveyed believe their teams are ready to scale AI initiatives, but they don't feel they have the expertise or tools to begin or advance their journey.

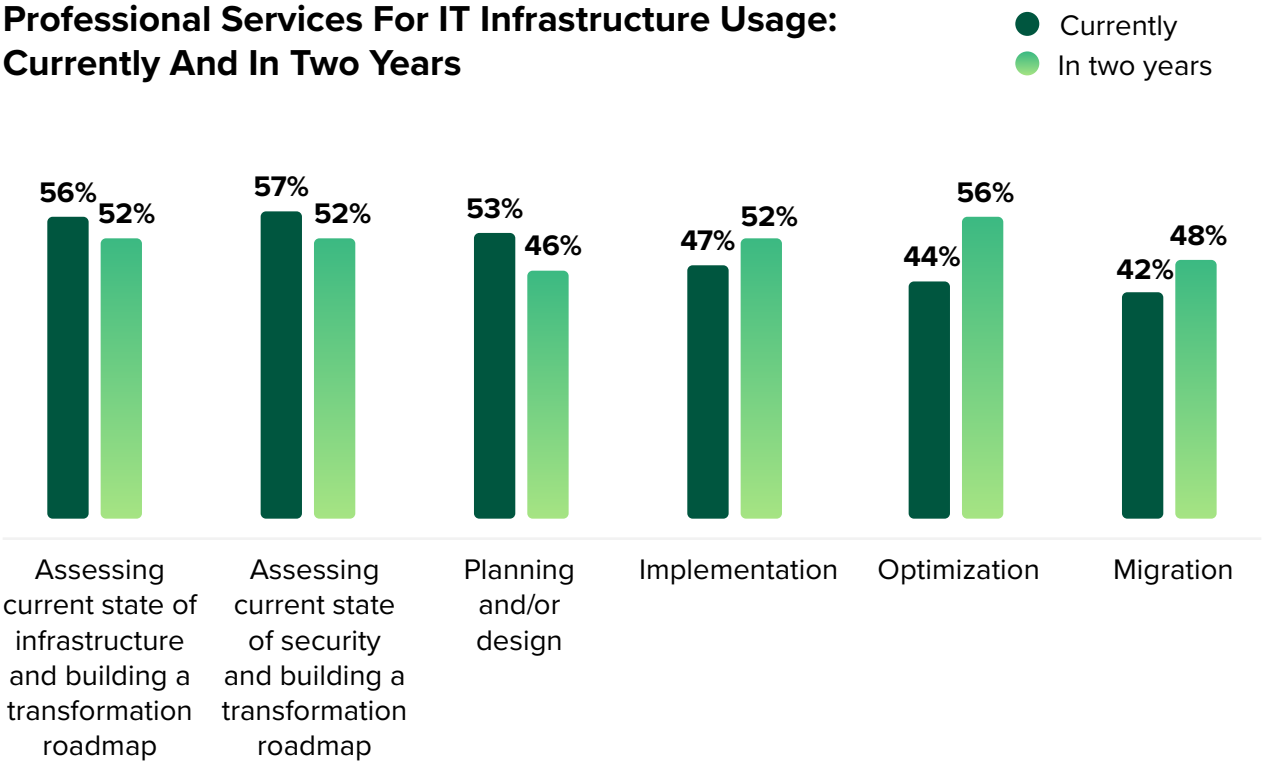
In surveying 718 IT professional services decision-makers, we found that:

- **Leadership is ready and willing to scale AI, but workforce enablement and organizational readiness lag behind.** Enterprises are prioritizing employee enablement, resiliency, and cost efficiency as core AI outcomes, and 95% of respondents believe their teams are "ready to scale AI initiatives." However, they don't feel they have the expertise or tools to begin or advance their journey. Those who do not feel ready to scale identified AI infrastructure and scaling expertise as well as AI and machine learning expertise as key skills gaps they need to close. With the growing emphasis on digital- first operations and personalized services, professional services for IT can help fill the gaps in expertise and operational capabilities to help prepare organizations to scale with their emerging technology priorities.

- **The role of professional services is expanding across the AI adoption journey, from implementation to strategic enablement.** Nearly 40% of enterprises are already engaged with professional services to support AI initiatives. Professional services engagements currently focus on the foundational building blocks of a successful AI adoption journey, including security assessments, infrastructure planning, and early AI readiness. Over the past two years, AI infrastructure has shifted from experimental to foundational in enterprise planning, and this is expected to continue into long-term strategic support. Almost all (99%) of enterprises believe that professional services will be critical for optimizing IT infrastructure for AI, increasing demand for professional services support in optimization, migration, and long-term AI strategy (see Figure 1).

FIGURE 1

Professional Services For IT Infrastructure Usage: Currently And In Two Years



Base: 718 IT decision-makers at global enterprises with responsibility over their organization's professional services for IT infrastructure strategy
Source: Forrester's Q1 2026 AI-Enabled IT Professional Services Survey [E-66761]

METRICS EVALUATING THE SUCCESS OF PROFESSIONAL SERVICES ARE CHANGING

Enterprises are redefining their priorities when selecting a professional services provider. The majority of enterprise survey respondents prefer working with a combination of the services provided by the technology vendor and its authorized services partner. They outnumber those who would work only with either the services provided by the vendor or an authorized services partner. This combination can provide broader expertise and scalability of coverage. Currently, quality of delivery remains the most important aspect of a professional services vendor. However, two years ago, cost and speed to implementation were IT leaders' second- and third-most important criteria, whereas today IT leaders are focused on clear value realization and the ability to reduce risk. AI can help explain this shift, as IT leaders are under pressure to define AI's value and ensure its security while scaling it across the business. With enterprises looking to use the full breadth of expertise professional services can provide through flexible engagement models, they can expect positive impact on priority business metrics.

- Over the next two years, AI will become a core part of IT's strategy, and IT leaders expect their professional services provider to assist with that ambition. In fact, 63% of respondents said they expect their service provider to offer AI-powered services that are more personalized and proactive. Professional services providers will need to evolve their models to meet their customers' AI needs (see Figure 2).
- An AI-enriched strategy will create an increase in hybrid roles and heightened pressure on reliability and resilience. To prepare for these changes, IT leaders are reevaluating how they will measure value from their service providers. The ability to deliver downstream business impact will slightly outpace the importance of deliverable quality. Further, customer satisfaction will replace efficiency metrics like time to delivery. Professional services firms should consider these changes when creating a value approach for their customers and prospects.

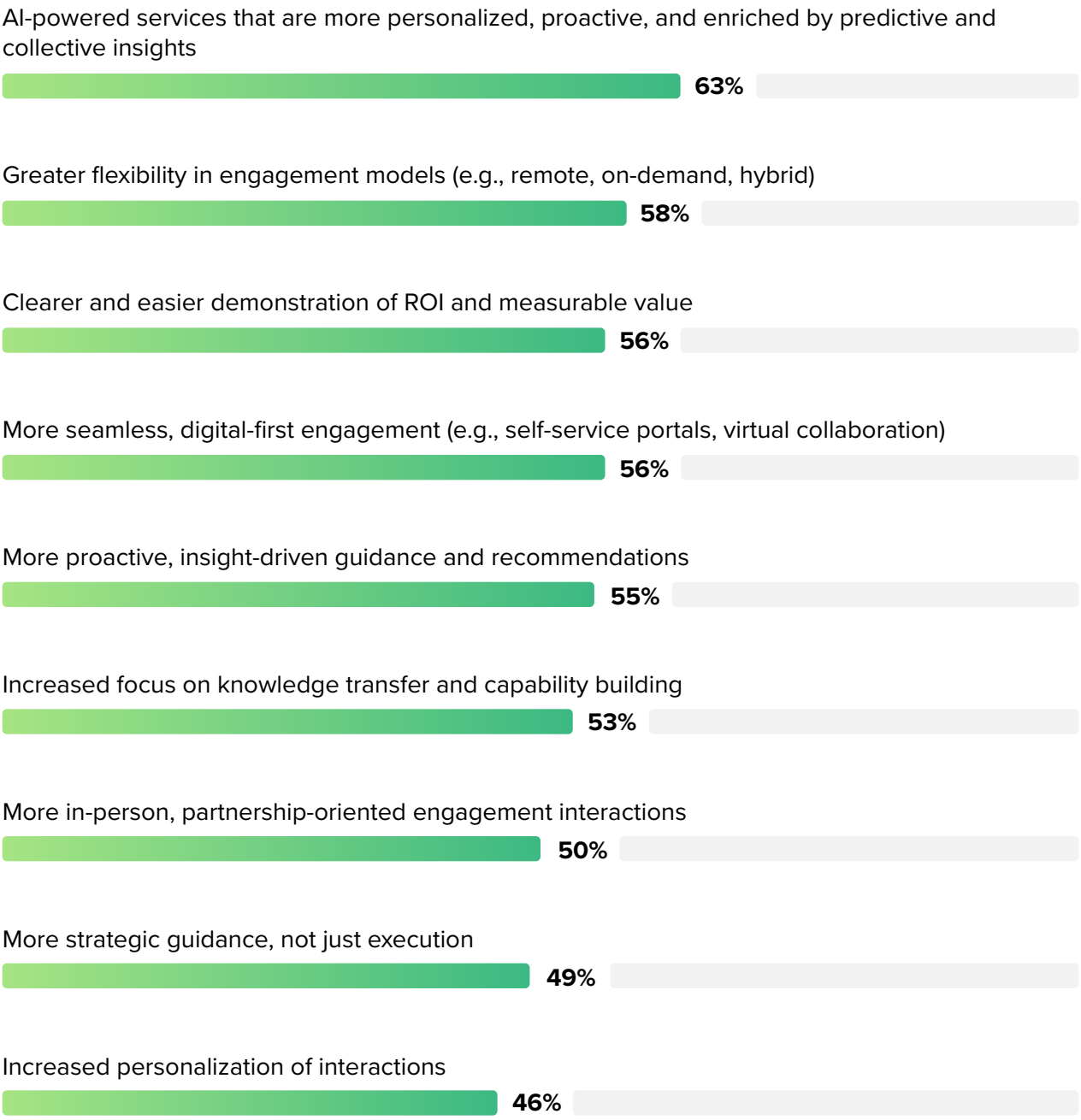
> IT leaders will shift how they evaluate service providers — prioritizing customer satisfaction over traditional efficiency metrics.



FIGURE 2

Value Expectations Of Professional Services For IT Infrastructure

(Showing ranked top five)



Base: 718 IT decision-makers at global enterprises with responsibility over their organization's professional services for IT infrastructure strategy
Source: Forrester's Q1 2026 AI-Enabled IT Professional Services Survey [E-66761]

Legacy Approaches And Infrastructure Aren't Prepared To Support Cutting-Edge Use Cases

As organizations race to operationalize AI across the business, many are discovering that technical complexity, skill gaps, and security risks are scaling faster than their infrastructure and teams. Whether they were early adopters or are just beginning their AI journey, AI driven environments introduce entirely new demands across IT management. This creates more complexity for strained IT teams already under pressure to modernize quickly and prove ROI. At the same time, shortages in AI and data expertise, increasingly complex cyberthreats, and fragmented, siloed legacy systems leave enterprises exposed, inefficient, and unable to scale with confidence. Further, fragmented systems stifle enterprises' ability to extract insights and move toward AI-driven operations.

Without structured support to holistically address architecture, security, governance, and operations, AI investments risk becoming costly, vulnerable, and underperforming instead of transformative.

- **Technical infrastructure adds complexity for infrastructure professionals.** AI infrastructure introduces new layers of complexity in compute, storage, networking, and integration. Organizations struggle with designing scalable, secure, and cost-efficient AI architectures. Infrastructure complexity stems from the fact that GPUs, networking, storage, and security must perform as one unified system; optimizing any one layer in isolation can silently bottleneck the rest, resulting in an underperforming cluster and delayed return on investment (see Figure 3).

- **Gaps in expertise and vulnerabilities in their attack surface leave enterprises unprotected.** IT organizations are facing shortages in AI infrastructure expertise, machine learning fluency, and data engineering, hindering their ability to smooth adoption processes. Gaps in security, recovery, and data accessibility also undermine digital resilience. Internal teams often lack experience with large-scale AI deployment and optimization and need assistance strengthening cyber resilience and security through performing proactive mitigation and reducing time to remediation.

IT organizations are facing shortages in AI infrastructure expertise, machine learning fluency, and data engineering, hindering their ability to smooth adoption processes.

FIGURE 3

Key Challenges In Providing The Best Experience For Their Customers

(Showing “Very challenging” and “Extremely challenging”)



Base: 718 IT decision-makers at global enterprises with responsibility over their organization’s professional services for IT infrastructure strategy
Source: Forrester’s Q1 2026 AI-Enabled IT Professional Services Survey [E-66761]

- **Security is a core part of securing the ecosystem and scaling AI.** Bad actors are getting smarter, and organizations struggle to keep up, while the ominous aura of Q-day looms.[3] IT organizations are already dealing with complex scaling requirements and data readiness, and now they must contend with increasingly complex AI-specific security threats, including model poisoning, data leakage, and adversarial attacks. Without proper cybersecurity and compliance expertise, respondents also face difficulty operationalizing security for their AI infrastructure through establishing governance frameworks that ensure data quality, compliance, and responsible AI use over time.

- **Organizations still face operational barriers.** With cybersecurity vulnerabilities and the increased need for AI-ready infrastructure, IT teams are facing new levels of pressure to deliver rapid transformation without adequate resources. Fragmented technology stacks and legacy systems slow AI adoption and create difficulty, demonstrating clear ROI for AI investments without structured support (see Figure 4).

FIGURE 4

Key Challenges In Future-Proofing Workplace IT Infrastructure

(Showing ranked top five)

43%	Technology design complexity (e.g., architecting flexible, scalable workplace solutions)
42%	Implementation and integration complexity (e.g., integrating new tools, systems, or platforms)
42%	Addressing evolving cybersecurity threats and strengthening AI-specific security controls
41%	Operational challenges (e.g., managing, monitoring, and maintaining evolving environments)
38%	Integration of AI tools into existing workflows
36%	Upskilling employees and driving adoption of new processes and tools
36%	Scaling connectivity and performance to meet new demands
36%	Understanding and supporting new workload requirements
35%	Ensuring seamless human-machine collaboration (expertise and integration)
34%	Ensuring consistent, high-quality user experience
33%	Balancing innovation and cost control
33%	Adapting to hybrid and remote working models
32%	Modernizing legacy infrastructure

Base: 718 IT decision-makers at global enterprises with responsibility over their organization's professional services for IT infrastructure strategy
Source: Forrester's Q1 2026 AI-Enabled IT Professional Services Survey [E-66761]

What Leading Organizations Expect From Professional Services In The AI Era

The AI era will both demand and enable a resilient infrastructure with continually improving performance, availability, and security. As organizations accelerate AI adoption, they must resist being distracted by surface level gains and instead ground their decisions in a clear understanding of their current infrastructure and the modernization required to unlock value realization — not just productivity improvements. Infrastructure leaders should prioritize investments that fill capability and expertise gaps, ensuring they can fully access, govern, and operationalize their data and tools. When selecting new areas of infrastructure investment, the focus shifts to capabilities that create durable value: enabling an AI-ready workforce, strengthening cyber resilience, and future proofing the workplace against evolving threats. AI-ready data centers and modernized infrastructure become central to this value equation, as AI rapidly becomes table stakes for enterprise competitiveness. Leadership must therefore prioritize data readiness and adapt their infrastructure to the new workload characteristics defined by AI, recognizing that these actions represent meaningful value realization across the business rather than traditional productivity metrics.

- **Leadership must enhance digital resilience and cybersecurity to match current threat levels.** Improved data accessibility and governance frameworks strengthen enterprisewide AI readiness and support a dispersed/hybrid workforce, while security-first architecture can reduce AI-specific risk exposure. Resilience must also account for disruptions to availability beyond security-related threats. Leadership teams must focus on optimizing their digital resilience to become an AI-ready organization.

- **Leadership must address pressing skills gaps and build long-term capability.** While organizations are ready to scale AI, they lack the skills to ensure that they derive long-term strategic value. Professional services can provide much-needed specialized expertise in AI engineering, data governance, and security. Co-delivery and knowledge transfer can

help upskill internal teams, and flexible engagement models will allow organizations to source expertise and scale support as needed so they can build out the right professional services engagement for their organization's needs. With respect to the full infrastructure lifecycle, nearly one-third of respondents expect professional services to provide AI-native expertise over the next two years. By providing these capabilities natively, professional services can help customers avoid the complexity and inefficiency of building their own solutions — effectively preventing them from reinventing the wheel.

48%

of respondents believe that professional services can deliver risk reduction of between 40% and 60%.

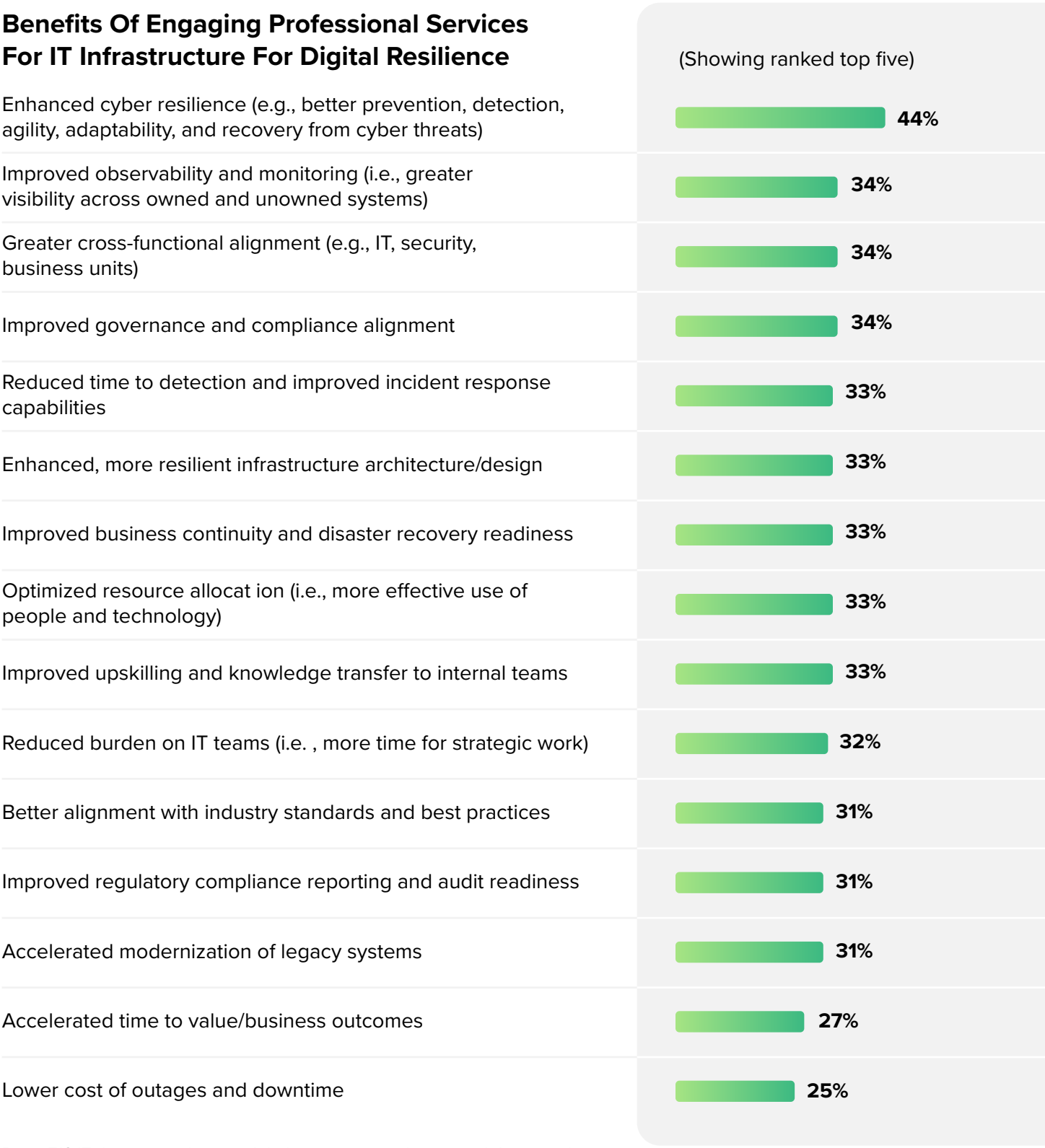
- **Resilience is the top infrastructure benefit expected from professional digital resilience services.** Enterprise respondents ranked this benefit 10 percentage points higher than other benefits, such as improved observability and governance. Relatedly, 48% of respondents believe that professional services can deliver risk reduction of between 40% and 60% (see Figure 5).

- **AI and infrastructure teams are shifting from experimentation to accountability, with measurable ROI as the mandate.** While enterprises focus on proving AI ROI in efficiency and quality, after the initial investment in new capabilities and measuring the effectiveness of specific use cases, overall cost management is also expected to increase over time. Streamlined operations and reduced complexity are also cited as strong benefits of professional services providers, with 60% of respondents saying that professional services could help save operational costs totaling between 30% and 50%. While AI tools will eventually ease the burden on IT teams, scaling AI is a marathon, not a sprint. Long-term partnerships can also enable continuous optimization and future-proofing and can support organizations in aligning technology investments with business outcomes to more easily report ROI.

Respondents believe that professional services can help save operational costs by **up to 50%.**

FIGURE 5

Benefits Of Engaging Professional Services For IT Infrastructure For Digital Resilience



Base: 718 IT decision-makers at global enterprises with responsibility over their organization's professional services for IT infrastructure strategy
Source: Forrester's Q1 2026 AI-Enabled IT Professional Services Survey [E-66761]

- **Integrated AI transforms how employees work — but only if the foundation is right.** To boost productivity, collaboration, and experience while staying ahead of rapid AI evolution, organizations need professional services to architect secure, modern, AI-enabled workplace infrastructure. But security and governance must be key design pillars to ensure that they don't rapidly adopt employee-enabling capabilities at the risk of the greater organization's data environment. Nearly one-third of respondents expect accelerated modernization of legacy systems through engaging with professional services for IT infrastructure, but the breadth of expertise provided will also positively impact employee upskilling and collaboration. As threat complexity increases, enterprises can lean on AI-enabled services to secure their evolving infrastructure while preparing their workforce to strategically manage their workplace for the future.

- **AI adoption must be strategic, and professional services can provide support for building scalable, secure, and high-performance AI infrastructure.** Professional services have proven their usefulness by preparing organizations for AI adoption and impacting productivity metrics. Now, they can guide enterprises through further strategic milestone activities like AI-ready data center design, cloud modernization, and workload optimization, driving downstream benefits for the business. By accelerating migration and optimization, professional services reduce time to value and risk for AI initiatives while enabling faster development and deployment cycles that shorten time to market. In fact, 61% of respondents say professional services can help reduce time to market for new products and services by 30% to 50%, reinforcing their role in driving faster, more efficient product delivery (see Figure 6).

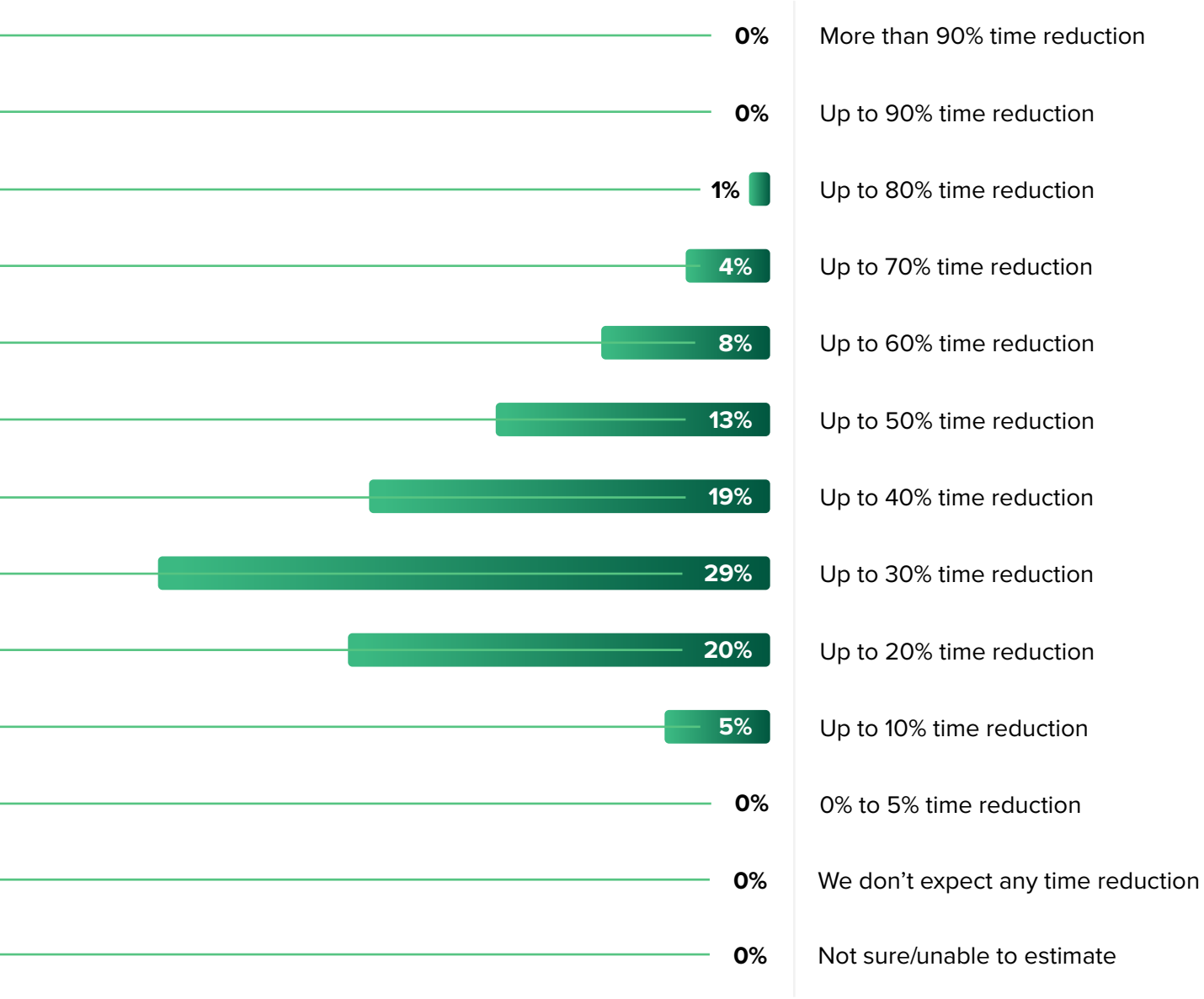
61%

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FIGURE 6

Expected Reduced Time To Market For Delivery Of New Products And Services To Customers



Base: 718 IT decision-makers at global enterprises with responsibility over their organization’s professional services for IT infrastructure strategy
Source: Forrester’s Q1 2026 AI-Enabled IT Professional Services Survey [E-66761]

Key Recommendations

IT organizations must prepare for an AI-first world, but they do not have to do it solo. Forrester's in-depth survey of 718 global IT decision-makers about their current and evolving use of professional services for IT infrastructure tools yielded several important recommendations.

Lay an AI-ready infrastructure foundation before scaling use cases. Building and maintaining AI infrastructure requires expertise in multiple domains — from data centers to enterprise networks to security and observability. Assess your current compute, storage, network, and data pipelines, then modernize the data center and cloud architecture for scalable performance and cost predictability. From a design perspective, prioritize remaining resilient by design and observable for transparency and audibility. Use professional services to accelerate design choices that are in line with their cross-dimensional expertise, standardize reference architectures, and shorten time to value. With these design principles, you can build with flexibility in mind and begin using newer approaches like infrastructure as code.

Close expertise gaps with co-delivery, not handoffs. The current popularity of forward-deployed engineers proves the value of tech co-delivery. Prioritize embedding specialists from service providers and tech partners alongside your teams (AI engineering, data governance, security) to drive co-delivery to provide faster ramp for your employees on a new technology. This reduces dependency on outside help over time while improving tooling, operational runbooks, and confidence to run and optimize AI workloads.

Treat digital resilience as prerequisites for AI and hybrid work. Sovereignty is becoming important across markets. See if your solutions and services partner are helping to move the needle in the right direction. Strengthen recovery, continuity, and observability across infrastructure and data so AI initiatives don't increase operational risk. Use professional-services-led assessments to assess your sovereign posture, improve data accessibility, and validate that resilience controls work under real incident scenarios.

Engineer security and governance for AI-specific threats from day one. Expand security programs to cover model poisoning, data leakage, and adversarial attacks, and set clear governance for data quality, compliance, and responsible use. Select partners that can go beyond providing strategic guidance to implement security-first architectures and operationalize controls.

Shift professional services success metrics to measurable cost and operational outcomes. Beyond deliverable quality and speed, track ease of operations, cost savings, and ROI realization. Use services to streamline processes, reduce stack complexity, and continuously optimize infrastructure and workloads to translate modernization into sustained efficiency, not one-time project wins.

Appendix A: Methodology

In this study, Forrester conducted an online survey of 718 IT decision-makers at global enterprises with responsibility over their organization's professional services for IT infrastructure strategy in North America, Europe, and Asia Pacific to evaluate the evolving use of professional services for IT infrastructure. Survey participants included decision-makers in director-or-above roles in IT and operations. Respondents were offered a small incentive as a thank-you for time spent on the survey. The study began in February of 2026 and was completed in March of 2026.

Appendix B: Demographics

COUNTRY	
United States	**19%**
Canada	**14%**
United Kingdom	**14%**
India	**13%**
Germany	**11%**
Japan	**8%**
Australia	**7%**
United Arab Emirates	**6%**
Saudi Arabia	**3%**
France	**3%**
New Zealand	**3%**

Note: Percentages may not total 100 due to rounding.

INDUSTRY	
Manufacturing and materials	**12%**
Healthcare	**11%**
Financial services and/or insurance	**11%**
Energy, utilities, and/or waste management	**8%**
Technology and/or technology services	**8%**
Retail	**7%**
Construction	**6%**
Consumer product goods and/or manufacturing	**6%**
All others	**31%**

EMPLOYEES	
20,000 or more	**8%**
5,000 to 19,999	**24%**
1,000 to 4,999	**68%**

Appendix C: Endnotes

[1] Source: Deliver Adaptive, Resilient Operations, Forrester Research, Inc., January 9, 2026.

[2] Source: Artificial Intelligence Market Insights, 2025, Forrester Research, April 25, 2025.

[3] Source: The State Of Quantum Computing, 2026, Forrester Research, February 24, 2026.


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