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Beyond the Hype: Enterprise Impactof ChatGPT and Generative Al





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Frances Karamouzis
Distinguished VP Analyst



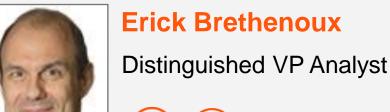




Bern Elliot
Distinguished VP Analyst













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Time to Million Users



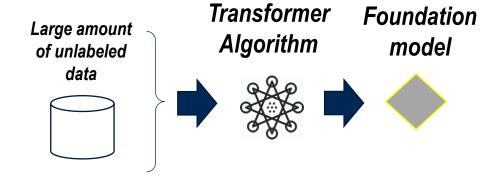


Understanding ChatGPT, LLMs, **Foundational Models** and Generative Al

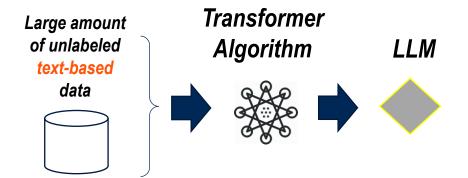


Definitions

Foundation models



Large Language Models (LLMs)



Generative AI - Generative AI refers to AI techniques that learn a representation of artifacts from data and models, and use it to generate brand-new, completely original artifacts that preserve a likeness to original data or models.

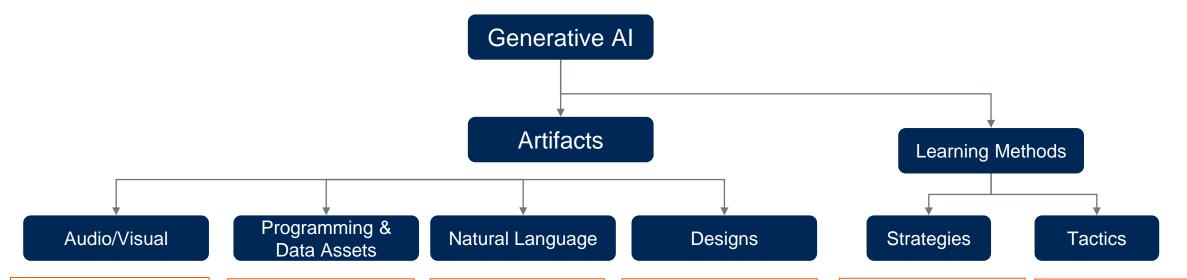
Foundation model - A foundation model is a large machine learning model trained on a very large amount of unlabeled data using a transformer algorithm; this training, augmented by a range of fine-tuning (adapter) mechanisms, results in a model that can be adapted to a wide range of applications.

Large Language Model (LLM) – an LLM is a type of foundation model specifically focused on natural language.

ChatGPT is a conversational <u>application</u> built on top of an LLM (in this case OpenAl's GPT model).



What Can We Generate?



- 2D/3D Faces/Bodies
- Drawings/Photographs
- Art
- Voice/visual characters
- Music

- Training data e.g (events, POS, behavior)
- Test & Synthetic Data
- · Code
- Context Data e.g. Market Conditions

- Questions/ Answers
- Summaries/ Roundups
- Stories/Narratives
- Documents
- Job Listings

- Product Designs
- Materials
- · 3D models
- Game worlds
- · Process flows
- Schematics/
 Specifications
 e.g. drugs,
 Infrastructure
 and buildings,
 film edits...)

- Unprogrammed game strategies
- Unanticipated strategic scenarios

- · Rules / Inferences
- Reinforcement learning models
- Alternative learning mechanisms



Example: Generative Al

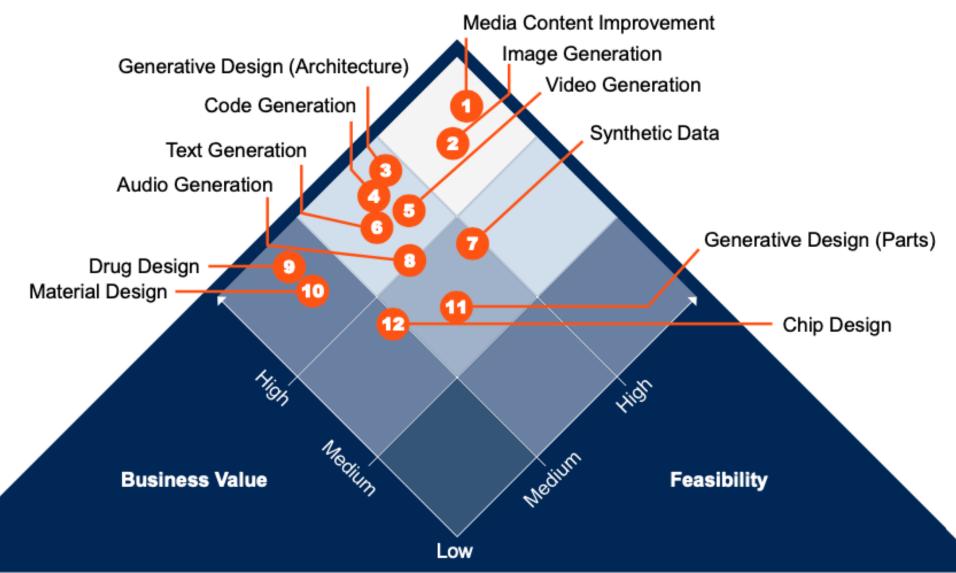




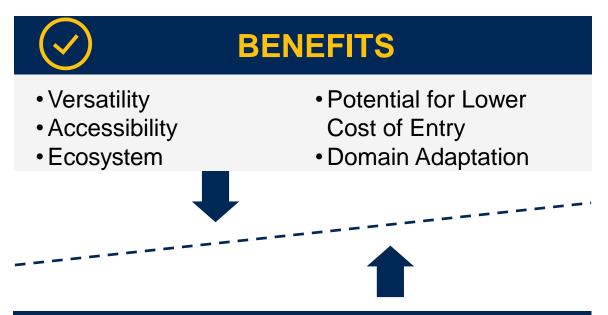
https://openai.com/blog/emergent-tool-use/



Gartner Use Case Prism for Generative Al



Benefits & Risks of Foundation Models





RISKS

- **Domain Adaptation**
- Copyright Issues
- Concentration of Power
- Hallucination
- Potential for Misuse
- Opaque (black box)

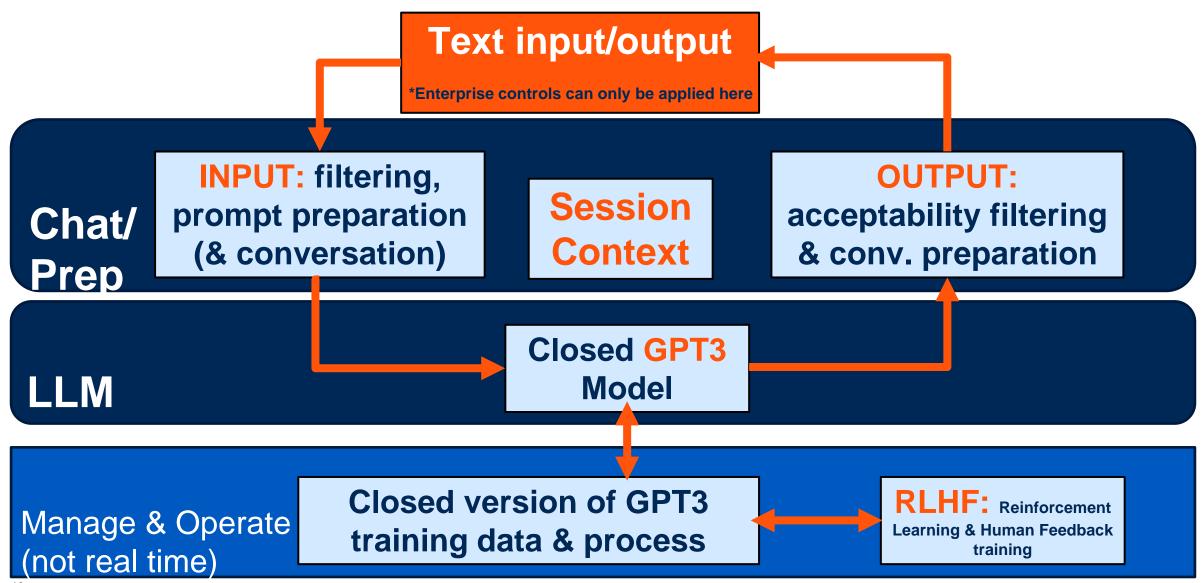
The Challenges Are Nontrivial for Enterprise **Deployments**



Deeper Dive ChatGPT



Conceptual Flow of the ChatGPT Service



Deployment Approaches for GPT & ChatGPT

Out of the Box **Model Usage ChatGP**

- Uses ChatGPT service as-is, no direct access to GPT3.5 model.
- Pro Fast to market, limited investments, gain experience.
- Con Limited differentiation, control range is limited.



Prompt Engineering

- Tools to create, tune, and evaluate prompt inputs & outputs.
- Pro Better targeted ChatGPT & GPT3 results, low startup costs.
- Con Must integrate with business systems to introduce data.

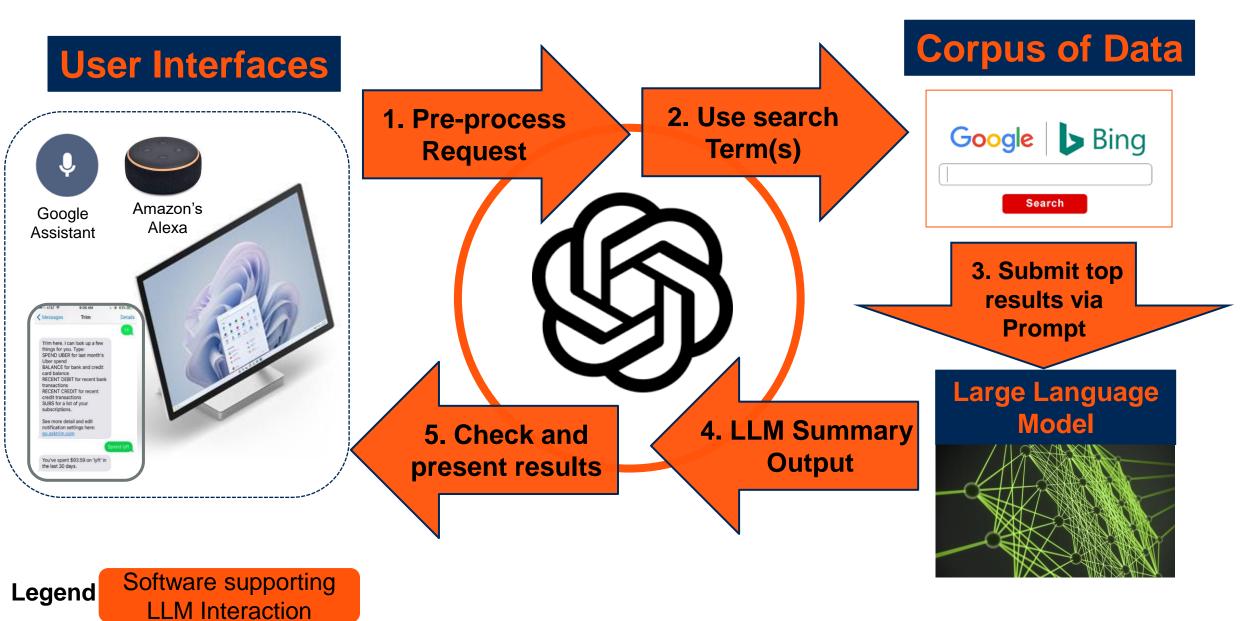


3. Leveraging **Custom Models GPT3 Model**

- Leverage (build/license) GPT or other language models directly.
- Pro Customize or optimized models, data, parameters & tuning.
- Con Requires added funding and skills. This is not <u>ChatGPT</u>.



Using search before LLM prompting



Examples of LLM Usage Areas

Content creation & augmentation

ChatLLMs can produce a "draft" output of text, which is then reviewed by the user. ChatLLMs can produce the length and style of text desired..

Q & A and discovery

Enables users to locate answers to input, based on data and prompt information. Usable for out of box Q&A.

Tone of content

Text modified to soften language or professionalize text, for example taking formal document and making a conversational text for email or a chat..

Summarization

Offers shortened summaries of conversations, articles, emails and web pages to specific length. Conversion of text to bullet points.

Simplification

Creation of titles, outlines, and extraction of key content from other content or summaries.

Classification of content

Review content and classify into defined areas. For instance, classification based on sentiment, topic, requirement or intent.

Customer Service

Improve chatbot intent identification, summarize conversation, answer customer questions from a search, directing customers to resources. Healthcare

Chatbots and applications can provide simple language descriptions of medical information and treatment recommendations.

Industry Examples



Create personal learning experience, like tutors.
Generate learning plans and custom learning material.

Sales & Marketing

Engage with potential customers on website or in a chatbot. Provide recommendations. Provide product descriptions. Customize emails.

Personal Assistants

Manage schedules, summarize emails, compose emails (and chains), replies, and summaries, draft common documents.

Software Development

Write code from prose, convert code from one programming language to another, correct erroneous code, explain code.



Vendor Landscape



Generative AI Providers

Applications

Content Creation

Jasper AI, Writesonic, Rytr

Knowledge Mgmt. Sana, Algolia, Glean

Workforce **Productivity**

Supernormal, Cogram

Metaverse

Replikr, Tavus

Software Engineering

GitHub, Tabnine, Replit

Biotech

Insilico Medicine, Exscientia

Proprietary FMs

OpenAl	Google Al	Microsoft
Cohere	Anthropic	Al21 Labs
Alibaba Group	Baidu	Tencent

OSS FMs

Stability Al	Eleuther Al	Meta
Hugging Face	Databricks	Zhipu Al
DeepMind	DistilBERT	XLNet





Future Directions

What does Gartner see as the enterprise trajectories?



Bern's Enterprise Trajectories



By 2025, 30% of enterprises will have implemented an Alaugmented development and testing strategy, up from 5% in 2021.



By 2026, generative design AI will automate 60% of the design effort for new websites and mobile apps.



By 2026, the role of design strategist — a blend of the current roles of designer and developer — will lead 50% of digital product creation teams



Erick's Enterprise Trajectories



Revenge of the software grease monkeys: the increased use of foundation models will shift the skills emphasis from All experts to traditional software engineering, validation & testing.



The explosion of adapter models will accelerate the development and adoption of Composite AI models by an order of magnitude in the next 3 years.



By mid-2024, Decision Intelligence will have superseded the Generative Al's hype wave.



Fran's Enterprise Trajectories



1% of code is delivering 80% of the Net New Value

Source: Gartner client - CIO responsiblee for over 4,000 developers



By 2026, over 100 million humans will engage robocolleagues (synthetic virtual colleagues) to contribute to enterprise work.

Author: Frances Karamouzis



Prompt Engineering





Fusion Teams

Changing the Prompt **Citizens Prompt Engineering Skills Where Do These Meet? LLM Fine-Tuning Skills Professionals Changing the Model**



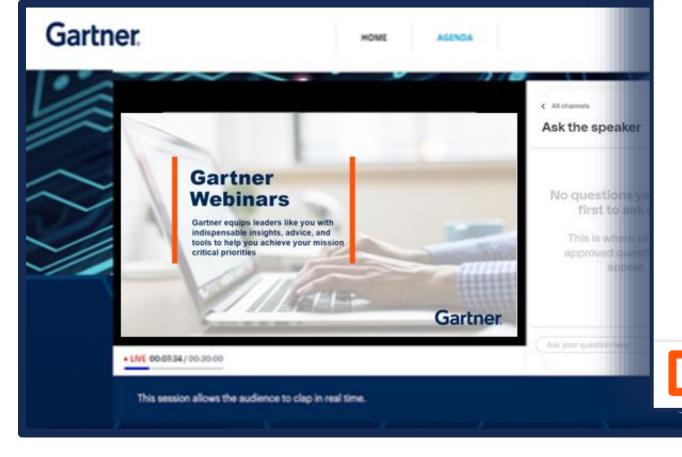
Q&A

I would rather have questions that can't be answered than answers that can't be questioned.

Richard P. Feynman



Ask the speaker



Ask the speaker

∢ All channels

No questions yet. Be the first to ask one!

This is where all of the approved questions will appear

Ask your question here





Gartner Poll

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Recommended Gartner Research

- Gartner Addresses Frequently Asked Questions on ChatGPT Anthony Mullen, Bern Elliot, Frances Karamouzis, Erick Brethenoux (G00786727)
- ChatGPT and GPT: A Board Reference Presentation Bern Elliot, Jim Hare, Anthony Mullen, Van Baker (G00787035)
- Innovation Insight for Artificial Intelligence Foundation Models Arun Chandrasekaran, Magnus Revang and Arnold Gao (G00769102)



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Influence on Enterprise Leaders' Digital Dexterity





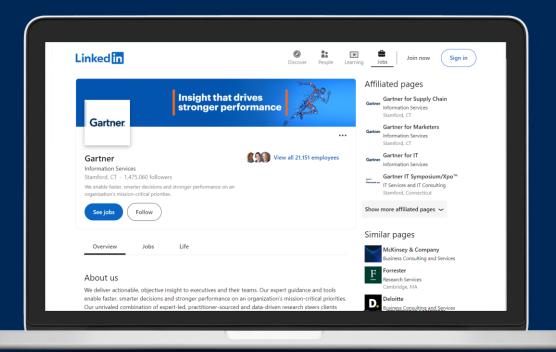
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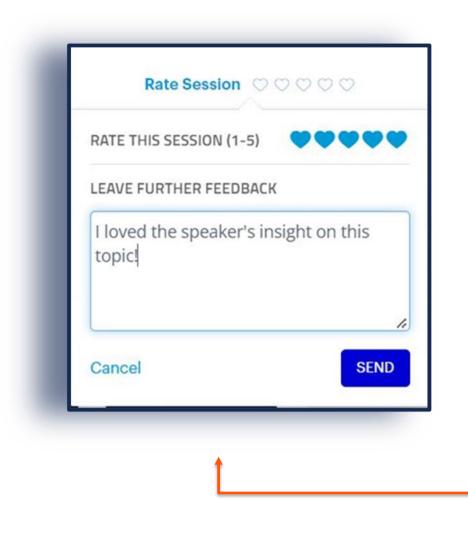
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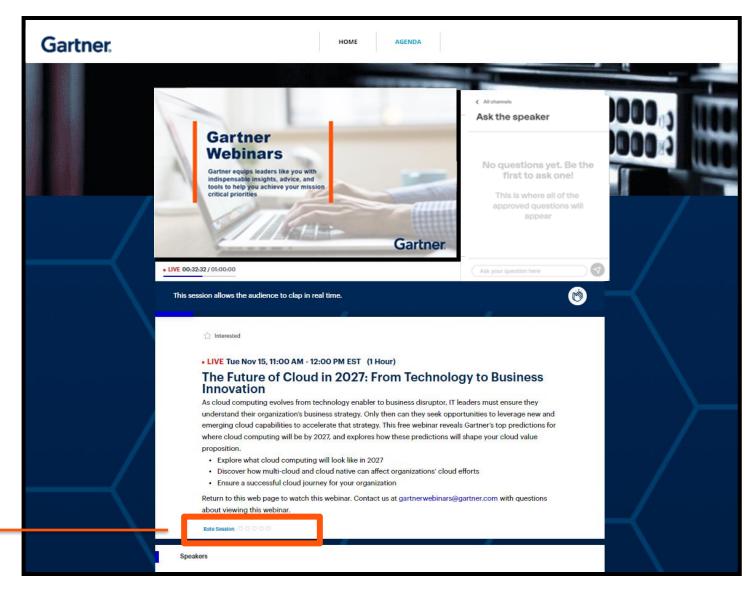


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Appendix

Gartner Published Slides re: ChatGPT



Gartner's Addresses Frequently Asked Questions (FAQs) on ChatGPT

February 2023
Doc number 786727

Authors: Anthony Mullen, Bern Elliot, Frances Karamouzis, Erick Brethenoux, Leinar Ramos, Darren Topham, Gabriele Rigon, Ben Yan



Gartner's Positions: ChatGPT FAQs



Business Value & Use Cases



Workforce **Impact**



Technology



Vendors and **Ecosystem**



Security and **Risk Management**

- What is ChatGPT and how does it work?
- What role will ChatGPT play in the enterprise?
- What are the main use cases for ChatGPT?
- What is the ROI of ChatGPT?
- How much does ChatGPT cost?
- Should I provide ChatGPT powered experiences directly to my customers?
- What bias is in ChatGPT?

- Will ChatGPT replace iobs?
- What is the impact of ChatGPT on the enterprise workforce?
- What is the magnitude of workforce impact?
- What is Gartner prediction for the future of the enterprise?

- Is ChatGTP Artificial General Intelligence?
- Is ChatGTP a new Al paradigm?
- · What are the multilingual capabilities of ChatGPT?
- What are the different ways you can use ChatGPT?
- · What are the current limitations of **ChatGPT**
- Can I use my own data with **ChatGPT**
- Can ChatGPT personalize content?
- Can I use it to build or integrate into other systems?
- · What new features will be added to ChatGPT?

- Is ChatGPT a replacement or threat to search?
- Are there ChatGPT competitors?
- What markets will spring up around ChatGPT?
- Does ChatGPT make my current Natural Language technologies obsolete?

- How secure is ChatGPT for my staff to use?
- What content filtering is provided by the ChatGPT service
- What is the risk of ChatGPT being used by bad actors?
- Who can view my conversations with ChatGPT?
- Will my conversations with ChatGPT be used for training?
- What bias is in ChatGPT?
- Is there a litigation risk from training data content owners in using ChatGPT.
- Can I detect if content has been generated by ChatGPT?
- Should I make a company policy around ChatGPT?



Overview

This research presents a distilled set of questions Gartner has received from clients and vendors, along with a short answer to each one from Gartner's expert analysts. For more in-depth guidance, see the Gartner research linked throughout the answers.

Gartner expects the ChatGPT service to change rapidly over 2023, and to be complemented by other offerings.

It is important for enterprise planners to distinguish between the OpenAl ChatGPT and the Azure OpenAl Service.

Gartner also expects several competitors will enter this market alongside ChatGPT. In particular, Gartner expects organizations like Baidu, IBM and Google to come to market early on in 2023, along with a crop of smaller players. For example, on 6 February 2023, Google announced the introduction of its own offering, Bard.



By 2026, over 100 million humans will engage robocolleagues (synthetic virtual colleagues) to contribute to enterprise work.

Author: Frances Karamouzis



Business Value & Use Cases

- 1. What is ChatGPT and how does it work? Chat Generative Pretrained Transformer, or ChatGPT, is a chatbot and generative language tool launched by OpenAI in November 2022.1 The ChatGPT models compute the most probable set of letters or words when given an initial starting phrase, or "prompt." ChatGPT is built on top of OpenAl's GPT-3 family of large language models, and enables interaction with a model via a conversational user interface. ChatGPT was trained using 300 billion words taken from books, online texts, Wikipedia articles and code libraries, then fine-tuned with human feedback.
 - On 16 January 2023 Microsoft announced the introduction of Azure OpenAl Services, which includes ChatGPT along with language models and added enterprise services.² It is important for enterprise planners to distinguish between the OpenAl ChatGPT and the Azure OpenAl Service. The Azure version promises significant enterprise operational features, but is still emerging at the time of writing.
- 2. What role will ChatGPT play in the enterprise? ChatGPT, and foundation models like it, will be used as a tool alongside many other hyperautomation and Al innovations. It will form part of architected solutions that automate, augment humans or machines, and autonomously execute business and IT processes. As generative AI takes its place alongside existing approaches to work, ChatGPT or other competitors will be used to replace, recalibrate and redefine some activities and tasks that form part of many job roles.
- 3. What are the main use cases for ChatGPT? ChatGPT can generate and augment prose and code development, summarize long-form texts, classify content, answer questions, translate and convert language (including programming languages).
- 4. What is the ROI of ChatGPT? It depends on the use case. For augmented scenarios, these tools can save writers and programmers time; however, those time savings will not necessarily be passed on to employers. End users should be realistic about the use cases and the value they look to achieve, especially when using the service as-is, which has major limitations. One such limitation is ChatGPT's reliability: generated text or code may be erroneous or biased, and therefore cannot be blindly consumed, but requires human validation, offsetting the initial time savings. Connect ChatGPT use cases to KPIs and ensure the project either improves operational efficiency, creates net new revenue or improves experiences.
- 5. How much does ChatGPT cost? The current research preview version of ChatGPT, which is the only version users could access up to the end of January 2023, is free of charge. However, there is no guarantee that this free service will persist, and it could be withdrawn at any time. OpenAI recently announced the launch of a pilot subscription plan for ChatGPT Plus for \$20 a month.3
 - ChatGPT will also come to the Microsoft Azure OpenAI Service soon, but the pricing for that is currently being rolled out.⁴ It is possible that significant elements will be bundled with different Microsoft 365 software subscriptions.
- 6. Should I provide ChatGPT-powered experiences directly to my customers? No this is too high risk at present for most use cases, except in rare cases, possibly related to gaming or entertainment, where the correctness or impartiality of the content may have less scrutiny...
 - ¹ ChatGPT: Optimizing Language Models for Dialogue, OpenAI.
 - ² Azure OpenAl Service, Microsoft.
 - ³ Introducing ChatGPT Plus, OpenAI.
 - ⁴ General Availability of Azure OpenAl Service Expands Access to Large, Advanced Al Models With Added Enterprise Benefits, Microsoft,



Workforce Impact

- 7. Will ChatGPT replace jobs? Initially, ChatGPT will augment targeted activities or tasks, rather than entire jobs. This will likely be followed by future versions of ChatGPT, as well other tools and combinations of tools, that will go beyond augmenting and likely start executing targeted activities or tasks. This will require testing, quality control, guardrails and governance.
- 8. What will be the impact of ChatGPT on the enterprise workforce? As mentioned in the answer to question 2, ChatGPT will be one of several tools, including other hyperautomation and AI innovations, used in architected solutions that automate, augment humans or machines, or autonomously perform business or IT processes. It will replace, recalibrate and redefine the activities and tasks that make up many job roles.
- **9. What is the magnitude of workforce impact?** There will be new jobs created, while others will be redefined. The net change in the workforce will vary dramatically depending on factors such as industry, location, and the size and offerings (products or services) of the enterprise. However, it is clear that the use of tools such as ChatGPT (or competitors), hyperautomation and AI innovations will focus on tasks that are repetitive and high-volume, with an emphasis on efficiency, such as reducing cycle time, increasing productivity and improving quality control (reducing error rates), among others.
- 10. What is Gartner's prediction for the future of the enterprise? Gartner's strategic planning assumption is that by 2026, over 100 million humans will engage robocolleagues (synthetic virtual colleagues) to contribute to enterprise work. This will not be powered only by ChatGPT (or competitors); rather, it will involve a number of other technologies and solutions.



Technology

- 11. Is ChatGPT artificial general intelligence? No. While ChatGPT and related large language models (LLMs) or foundation models have impressive capabilities, they cannot understand, learn or undertake any intellectual task that humans can (see Innovation Insight for Foundation Models). ChatGPT is a type of reinforcement learning approach. Although augmented with human feedback, it is essentially a machine learning construct, and lacks the generalization qualities provided by symbolic techniques.
- 12. Is ChatGPT a new Al paradigm? ChatGPT is an evolution of ongoing trends, rather than a new paradigm. The underlying model is based on transformer neural networks, which have been used as foundation models for over five years, including in vendor applications. However, ChatGPT does add some new elements to those foundation models, such as the conversational and short-term memory layers and massive human-in-the loop feedback (reinforcement learning) for the training process. The engineering delivered to make the model available for mass consumption is also novel, requiring extensive compute resources and model-serving architecture.
- 13. What multilingual capabilities does ChatGPT have? ChatGPT was trained on a multilingual corpus, and is able to respond to inputs and generate outputs in a number of languages. Gartner has informally observed that ChatGPT appears to work as well as the leading commercial machine translation model for English to Spanish, but is not as strong for the other official UN languages (Arabic, Chinese, French and Russian). ChatGPT is slower to translate than commercial engines. Users should evaluate the use of GPT-3 for translation on a case-by-case basis.
- 14. What are the different ways you can use ChatGPT? You can use the technology in one of four ways:
 - **As-is** Inputting prompts and receiving results via the web-based interface. This is by far the most popular usage approach today.
 - Prompt engineering without APIs Prompt engineering is the use of a service like ChatGPT in conjunction with other technologies as part of a workflow. This workflow can be achieved manually or by using screen scrape and robotic process automation (RPA) technologies.
 - **Prompt engineering using APIs** This model is not yet available, but expected in 1H23. While there are currently solutions on Github that enable an API wrapper around ChatGPT, they are not recommended for production builds or scale, and they are not supported by OpenAI.
 - Custom build It is possible to create a custom build of the core GPT2/GPT3 model for a bespoke implementation, but this would not have the conversational interaction or prompt filtering provided by ChatGPT.



Technology

- 15. What are the current limitations of ChatGPT? ChatGPT is only trained on data dated until 2021, so it has limitations on recency. It cannot provide the sources of the information from which its answers are generated, and has no explainability. Its reliability is only as good as its (unknown) underlying sources, which may be wrong and inconsistent, either in themselves or in how they are combined by ChatGPT, as already has been demonstrated in its use. It can only produce language and code, but cannot generate images. There is currently no supported API available. You cannot train ChatGPT on your own knowledge bases. ChatGPT gives the illusion of performing complex tasks, but it has no idea of the underlying concepts; it simply makes predictions. It does not provide data privacy assurances. Furthermore, while ChatGPT was recently updated to better handle mathematical gueries, it still cannot be relied on for computation.
- 16. Can I use my own data with ChatGPT? You can currently use your own data only to provide prompts to ChatGPT, but not to train or fine-tune it. If you take the as-is approach to ChatGPT, you can include your own data and content with your questions, such as pasting in software code and asking ChatGPT to debug it, or pasting in some text for it to summarize. However, you cannot currently add your own industry or domain knowledge data to train or fine-tune ChatGPT, although the Azure service is expected to make this possible in 2023. As an alternative, you can use the GPT2/3 engines without the ChatGPT conversational interface or additions, and use transfer learning to train your own version of the model (see <u>Innovation Insight: Transfer Learning</u>). However, this would not result in the same type of model as ChatGPT.
- 17. Can ChatGPT personalize content? It is not possible to personalize the user experience (UX) of ChatGPT. However, users can personalize (or rather, contextualize) generative output in a certain style via their prompts, such as by requesting ChatGPT to adjust its generated content to a specific writing style or educational level. The Azure OpenAl ChatGPT service is likely to add APIs, and at that point it is likely to be possible to intercept the input and output and handle the user experience with a different user interface.
- 18. Can I use ChatGPT to build or integrate into other systems? Yes, but at present it is better to build augmented approaches to support different roles. For more information on the different design patterns, see Design Patterns for ChatGPT.
- 19. What new features will be added to ChatGPT? The service is not static; for example, it was recently updated to better handle mathematical prompts. It is also possible that Microsoft could use the Azure OpenAl ChatGPT service to complement Bing search in 2023. We also expect the introduction of more formal API offerings to the service. Recently, Microsoft Teams Premium has received updates using the Azure OpenAI ChatGPT core model of GPT3.5.5



Vendors & Ecosystem

- 20. Is ChatGPT a replacement for or threat to search? No. ChatGPT is a complement to search, and only a partial alternative. ChatGPT focuses on generative approaches to answers, rather than artifact discovery (e.g., a certain document or sentence). Many search and insight engine vendors have been using the base GPT technology as part of their AI techniques for some time (see Magic Quadrant for Insight Engines). Gartner predicts that, over time, discovery methods like search will evolve to use foundation models alongside existing approaches.
- 21. Does ChatGPT have any competitors? Yes. There are several smaller vendors that have used large language models, similar to ChatGPT, to deliver specific task usage. However, many of the larger technology vendors have not commercialized their offerings. Gartner expects competitors like Baidu, IBM and Google to come to market in 1H23, along with a crop of smaller players. For example, on 6 February 2023, Google announced the introduction of its own offering, Bard.⁶
- 22. What markets will spring up around ChatGPT? The biggest evolution will be in creating bespoke variants of models like GPT, where systems integrators and vendors support end users to inject their own knowledge bases via transfer learning. We expect more corpora management and prompt engineering services and tools to arrive in 2023, as well as tools for fact-checking and generated text detection. Vendors are likely to differentiate their products through task-specific fine-tuning of their models, as well as by introducing tools to mitigate risks related to the explainability, reliability, fairness, security and transparency of generated content.
- 23. Does ChatGPT make my current natural language technologies (NLT) obsolete? No, it is not likely to do so. ChatGPT intersects two markets in the NLT space: conversational AI and natural language generation. If your chatbot undertakes transactional conversations and relies on your own body of knowledge, then ChatGPT will not replace it. Today, ChatGPT is a broadly useful, general purpose conversational tool, not a single-API panacea for NLT. ChatGPT and GPT technologies have a role to play within a workflow. It may be possible to use the technology within NLT systems, such as to generate synonyms, utterances and responses as part of a workflow. You should check with your incumbent vendors to see how they are using generative technologies like ChatGPT.



Security & Risk Management

- 24. How secure is ChatGPT for my staff to use? All employees who use OpenAl ChatGPT should be instructed to treat the information they post as if they were posting it on a public site (e.g., a social network or a public blog). They should not post personally identifiable information, company or client information that is not generally available to the public. There are currently no clear assurances of privacy or confidentiality. In addition, the information you post may be used to further train the model. Microsoft will be introducing privacy assurances for its Azure OpenAl ChatGPT service, just as it does for its other software services.
- 25. What content filtering does ChatGPT provide? ChatGPT has a toxic filter for inputs and outputs, but this is a complex task to undertake and requires good contextual modeling and a high level of nuance. Therefore, users should not rely on its output from a compliance or risk point of view, and should ensure that humans are in the loop to appraise inputs and outputs.
- 26. What is the risk of ChatGPT being used by bad actors? There are valid concerns that ChatGPT may be used by bad actors to generate false information at scale, create high-quality phishing emails and use its code generation capabilities to create malware. The ease-of-use and ubiquity of ChatGPT accelerate this risk. Service providers may require users to sign ethical usage agreements. However, these may be difficult to enforce.
- **27. Who can view my conversations with ChatGPT?** The ChatGPT service providers (OpenAI and soon Microsoft) can review conversations to improve their systems and ensure the content complies with their policies and safety requirements. There are no assurances regarding employees, contractors or partners who may view the information you post. It is expected that the Azure version of the service will follow existing Azure OpenAI services in this regard.⁷





Security & Risk Management

- 28. Will my conversations with ChatGPT be used for training? Yes, and they may be reviewed by trainers. It is not possible to delete specific prompts, so be careful what you share. It is possible to delete an account, but this will not delete the training data.
- 29. What biases does ChatGPT have? ChatGPT is fine-tuned or enhanced to align to the trainers' preferences (labeler's ranking), rather than verified facts, which means its output is plausible, but not reliable for many use cases. Moreover, bias might be present in the large datasets used to train the underlying GPT-3 model. Despite OpenAl's efforts to minimize bias and discrimination in ChatGPT, there are already known cases of these things arising.
- 30. Is there a regulatory risk associated with training data content owners to use ChatGPT? There are concerns about the ownership of data and intellectual property rights in relation to content used to train GPT-3 and ChatGPT. There is currently no clarity on this issue, so it poses a risk to OpenAI and the further use of ChatGPT.
- 31. Can I detect whether content has been generated by ChatGPT? Not in any reliable way at this time. Gartner has observed tools that attempt to do this, but so far they have had poor results detecting whether content was generated by ChatGPT or a human.
- 32. Should I make a company policy around ChatGPT? Yes. Your knowledge workers are likely to be using it already, either for experimentation or even to support their job-related tasks. Blocking ChatGPT outright may lead to "shadow" ChatGPT usage, while only providing organizations with a false sense of compliance. Therefore, all employees who use ChatGPT should be instructed to treat the information they post as if they were posting it on a public site, such as a social network or public blog. A sensible approach would be to monitor usage, encourage innovation, but ensure it is only used to augment employees, and is not used unfiltered with customers and partners.

Policies regarding Microsoft Azure OpenAl Services and the related ChatGPT and GPT3 will offer greater levels of privacy and security. They will need to be examined when they are ready and available in the market.





By 2026, over 100 million humans will engage robocolleagues (synthetic virtual colleagues) to contribute to enterprise work.

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