



# **The Southeast Asia CEO's Guide to AI Transformation**

Six lessons that can turn AI potential into  
a competitive edge for Southeast Asia.

## Authors and acknowledgments

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## Executive summary

AI is evolving at breakneck speed and reshaping the strategic priorities of every forward-looking organization. Foundation models are mimicking human reasoning, AI-generated content is everywhere, and autonomous systems are moving into real-world operations. Behind the scenes, billions are being invested in data centers and infrastructure to power the next wave of AI breakthroughs. At the same time, it is hard to separate the signal from the noise, and the unique context in Southeast Asia (SEA) makes it challenging for CEOs in the region to define their AI strategy.

SEA CEOs are asking themselves three critical questions, each driven by the realities they face today.

**Where should we focus?** There is no shortage of bold claims around AI disruption, but the shape and scale of impact are still unclear. Will value pools disappear due to disintermediation? Will AI-native disruptors rewrite the competitive landscape, or will traditional business models endure? SEA has distinctive characteristics such as market fragmentation and persisting gaps in essential services. SEA online consumers, on the other hand, are among the most engaged in the world, spending 23% more time on social media than the global average, making the region ripe for digital innovation. In this context, will the impact of AI vary in SEA vs. other parts of the world? Where should SEA CEOs focus to get ahead of disruption and outperform the market?

**What is the investment case?** Companies are experimenting with AI, but most aren't seeing bottom-line impact. Productivity gains alone rarely add to the P&L, especially in SEA where labor costs are low (average monthly wages are 7% of US levels), leaving limited room for headcount reduction as a big driver of ROI from AI investments. The SEA business landscape is unique (large-cap companies account for only 40% of SEA's market capitalization vs. 60% in India) and much more dependent on trade (total trade was 89% of SEA GDP over the past decade vs. 57% globally), leading companies to be more conservative in their approach toward AI investments. How should CEOs think about AI's true value in this unique context?

**How do we orchestrate the transformation?** Many companies have moved beyond pilots and isolated initiatives, but scaling enterprise-wide impact is still elusive. Our research shows that fewer than 20% of companies have meaningfully scaled generative AI. Transformation is even harder in SEA because of fragmentation across markets, regulations, and digital maturity, as well as inconsistent, siloed data and job displacement concerns. What can CEOs do to orchestrate change and unlock the transformation in their organizations?

Bain has been at the forefront of this wave, partnering with pioneers like OpenAI and advising clients globally on how to navigate this once-in-a-generation transformation. In our work with clients across the region, we've helped identify what's holding progress back and, more importantly, what it takes to break through. We will attempt to address these questions in this guide, addressing myths along the way and sharing lessons from the AI transformations we're supporting in the region.

## Six lessons from the SEA region

### Where should we focus?

**Lesson 1. Take an outside-in perspective to develop a clear view of how AI could reshape your business.** Several disruption vectors are reshaping how businesses operate and compete, including AI-augmented customer engagement, autonomous physical operations, and AI-native high-performance operations. These changes are undermining advantages that companies have relied on for decades, such as brand loyalty and customer inertia or traditional models of headcount-driven growth. CEOs should evaluate how these forces will reshape their sector and business to get ahead of the disruption before peers.

**Lesson 2. Pick your battles. Focus on fewer bigger bets.** First, recognize that this is a business transformation, not a technology deployment. Too many companies are approaching AI through a technology-first lens, but this transformation can't be led only by the CIO. Most companies also spread their AI efforts across dozens of small projects, but the winners will choose two or three areas where the technology can fundamentally change how they compete, then go all in. Leaders have strategic clarity on aligning AI investments to strengthen business differentiation.

### What is the investment case?

**Lesson 3. It's not about productivity. It's about accelerating organizational speed.** Many technology teams talk about AI in terms of boosting productivity and streamlining teams. But when that doesn't lead to bigger profits, CEOs are left frustrated. On their own, productivity gains aren't enough, and streamlining teams is often the wrong objective. AI's real value is that it helps companies move faster. That means responding to customers more quickly, innovating faster, speeding up sales, and staying agile when things change. To unlock that value, CEOs should set goals around speed and responsiveness to ensure that AI moves the business forward.

**Lesson 4. Decouple revenue and cost growth.** Looking at the ROI of individual use cases is short-sighted. It keeps companies focused on short-term gains instead of long-term transformation. For SEA companies, the real opportunity of AI is using it to change how they grow. With the right strategy, AI can help leaner teams serve more customers, tailor services at scale, and manage more risk and complexity, all without adding more staff. Effective AI transformation decouples your revenue growth from cost growth.

### How do we orchestrate the transformation?

**Lesson 5. You have the talent you need; now it's about activating it.** AI transformation doesn't fail because of a lack of data scientists. It stalls because existing teams aren't equipped to think and operate in an AI-first way. Consider how people are experiencing this inflection point—technology is evolving quickly, signals are confusing, and there is also wide-ranging fear of human replacement. Bain research indicates that AI-related change looks and feels different. To deliver value, companies need to orchestrate both the “Lab” (reinvention of priority business processes) and the “Crowd” (broad upskilling across the organization) with a focus on adoption and trust, earned through experimentation. Scaling AI is a change management challenge, not a hiring one.

**Lesson 6. Invest in data. Data is your biggest enabler (or will be your biggest bottleneck).** In every successful AI transformation, the biggest investment and effort go into fixing the data. This is particularly true in SEA, where data is often scattered, inconsistent, and limited by local regulatory rules. Instead of developing the perfect, clean, comprehensive data set for your business, build the right data foundations with selective proprietary data assets and low-cost data teams and governance. Leading companies are also upgrading their data and technology architecture to move to agentic AI, with an AI platform to provision, orchestrate, and monitor services.

Let's explore each of these themes in the following chapters and how companies driving AI transformation are addressing these challenges in SEA.

## Chapter 1: Where should we focus?

There's plenty of noise around AI, and CEOs are asking familiar questions: "Where should I focus? What is the real impact AI will have on my sector (beyond the hype)? How is it disruptive?" However, there is a muddled understanding of how AI will be disruptive. In some sectors, AI is reshaping everything. In others, the changes are more subtle. Across the region, though, there are three vectors of disruption that will have broad impact: AI-augmented customer engagement, autonomous physical operations, and AI-native high-performance operations. In this context, the first lesson for CEOs is to develop a nuanced perspective of the impact on their business.

### **Lesson 1. Take an outside-in perspective to develop a clear view of how AI could reshape your business.**

AI is already changing how we search, shop, and make decisions. But a bigger shift is coming: AI agents that act on behalf of customers. What happens when every customer has their own AI agent, handling research, comparisons, and purchases with minimal human input? This shift could upend long-held business advantages like brand loyalty, relationship-driven sales, and high switching costs. In SEA, where digital engagement is higher than most other regions, the rise of AI agents could be highly disruptive. While AI will not replace the need for physical businesses, it will become an important channel.

As customer engagement splits into two paths, companies must adapt:

- For low-interest, high-friction purchases, customers may delegate to AI. Businesses will need to offer machine-readable information and seamless digital transactions.
- For emotional or high-value decisions, customers will still want a human touch, but with smarter, more personalized experiences.

Consider a leading SEA bank that identified this critical disruption and focused its AI strategy on transforming customer engagement in its business ahead of competitors (*see Case Study 1*).




## Case Study 1

**Leading Southeast Asia bank****Background**

A leading Southeast Asia bank was evaluating generative AI's biggest opportunities. Together, we prioritized the client experience in its wealth division as one of the highest-impact opportunities for it to leapfrog competition. This segment faced significant disruption, with clients expecting more tailored advice, digital challengers promising faster and smarter services, and traditional advisory models not keeping up due to stretched relationship manager bandwidth.

**Focus of AI transformation**

The focus of its generative AI strategy was to transform the wealth advisory model with AI-augmented customer engagement. The bank partnered with Bain to launch a first-to-market generative AI relationship manager assistant designed to help relationship managers deliver highly tailored advice to clients with minimal effort. We built a sophisticated tool with a multi-agent framework that ingested a range of data, including client profiles, product catalogs, and CIO views, to offer relationship managers high-conviction proposals on demand.

**Impact** **1.5X**

targeted uplift  
in relationship  
manager  
productivity

 **40%**

targeted  
increase in  
top-of-funnel  
conversations

 **10pp**

targeted  
increase in lead  
conversions

"I would definitely bring these ideas to my clients. ... They would be interested. The explainability is there, it is really nicely done."

—**Relationship Manager**

Another vector of disruption is that foundation models are upgrading performance of autonomous systems—robots that can operate independently in dynamic, unstructured physical environments. While drones and other autonomous tools have been around for years, recent advancements have dramatically improved their capabilities.

SEA is already seeing early pilots in areas like ride-hailing and food delivery, where robotic fleets are being tested in controlled environments. As technology improves and costs drop, these systems will go mainstream, transforming sectors like logistics, agriculture, and mining. For incumbents, the next wave of competition will have better tools and different cost structures. Companies with heavy physical footprints will need to deploy AI-enabled autonomous systems ahead of peers.



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The third, and perhaps broadest, vector of disruption is likely to come from companies rethinking traditional business processes and operations with an AI-native approach. Instead of adding AI on top of old workflows, these businesses are redesigning how decisions get made using real-time intelligence to simplify, speed up, and improve outcomes across the board. And in doing so, they're setting new expectations around responsiveness and value.

“

AI adoption across organizations is evolving rapidly. Companies have moved from experimentation to scaling AI across operations, focusing on measurable outcomes and building their competitive advantage. The companies pulling ahead are driven by leaders who see it as a strategic imperative with a clear vision. They are prioritizing use cases built on the strong foundation of high-quality data and security while measuring results to maximize AI's impact. Winning with AI isn't about having the most or latest models; it's about having the clearest vision and the most rigorous execution.”

**Sapna Chadha**

Vice President for Google  
Southeast Asia and South  
Asia Frontier, Google

**Lesson 2. Pick your battles. Focus on fewer bigger bets.**

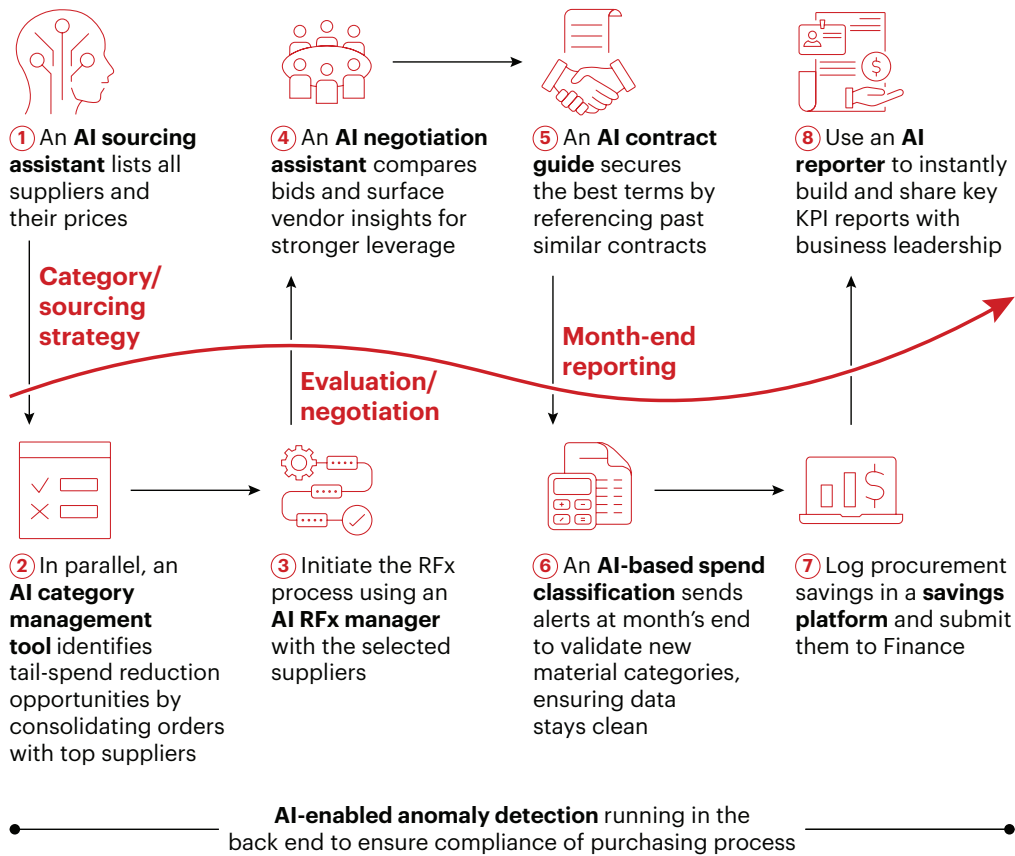
Each of the disruptions described in lesson one is playing out differently across markets. CEOs should think deeply about their current competitiveness and the potential impact from these disruptions to their sector (both to themselves and their competitors). But developing this nuanced, outside-in view of the impact of AI on their business is only half the battle. CEOs then need to strategically choose where they want to build future differentiation to define the focus of their AI transformations.

At this stage, we find that many CEOs take the path of encouraging business leaders across the organization to pursue AI use cases. While this may seem like a good approach to drive broad impact, it can be fraught with execution challenges and rarely creates meaningful change. AI creates many opportunities, but an AI strategy to build 10 use cases across the business is far less effective than one that focuses all 10 in a single domain.

Consider a leading global agribusiness based in SEA that prioritized procurement as the focus of the first phase of its AI journey. Instead of tackling use cases across the company, we worked with the business to double down on procurement, taking an AI-native approach to reimagine the function and develop a suite of AI tools for the future (see *Figure 1*).

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**Figure 1:** Reimagining category management with an AI-enabled procurement platform



Sources: Bain analysis

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Another example is a leading Asian engineering, procurement, and construction company, where our focus was to transform project planning and execution to build a high-performance, AI-enabled delivery capability to dramatically improve their competitiveness vs. peers (*Case Study 2*).

## Case Study 2

**Leading Asian engineering, procurement, and construction company****Background**

A leading Asian engineering, procurement, and construction company launched an enterprise-wide program to identify the most valuable AI solutions to enhance performance in its core business. To strengthen its competitive advantage, the goal was clear: Unlock P&L impact through cost reduction and productivity uplift by focusing on high-impact AI use cases. Bain partnered with the company to design an AI strategy for scale transformation, create a use-case roadmap, and develop AI solutions.

**Focus of AI transformation**

The transformation started with enterprise AI enablement: assessing hosting infrastructure, closing scale gaps, defining enterprise architecture, and creating a roadmap for cost-efficient scale.

Bain then built AI solutions for core project operations, spanning equipment and workforce planning, mobilization, and tracking. We built a Project Management Assistant that provides real-time project performance visibility and delivers recommendations for project leadership to correct course on resource utilization, supply-chain delays, and off-track project financials.

Additionally, Bain developed supply chain AI solutions to empower procurement teams to make faster, smarter, and lower-risk sourcing decisions through vendor discovery, dynamic risk profiling, and real-time market intelligence. The focused approach streamlined operations where it created the greatest impact for the business.

**Impact****1%–2%**

expected reduction in overall construction cost through adoption of AI use cases at scale

**20%**

reduction in operational delays through streamlined workflows and productivity enhancement

**60K+**

users empowered with AI solutions that were designed, developed, and deployed across the organization

CEOs will be able to better define their agenda if they can recognize the ways in which AI will disrupt the market and bring strategic clarity on how to strengthen their competitive position in an AI future. Once it's clear where they should focus their organization, they should articulate the investment case.

“

Across ASEAN, we see our most forward-looking customers and partners reframe their approach to AI to reimagine customer engagement, accelerate product innovation, and build entirely new digital capabilities. In Microsoft, we encourage CEOs to anchor their AI transformation efforts on four key pillars: enriching employee experiences, reinventing customer engagement, reshaping business processes, and accelerating the curve on innovation to create market differentiation.

Our work with frontier firms—those embracing generative AI to redesign workflows with AI agents—shows what's possible. From streamlining customer management and proposal creation in leading SEA banks, to building single sources of truth for complex analytics in large enterprises, to unlocking entirely new business models like hyper-personalized financial services—AI is already powering next-generation capabilities that were once out of reach.”



**Mayank Wadhwa**  
President, Microsoft ASEAN

## Chapter 2: What is the investment case?

Many SEA CEOs tell us they're struggling to define a clear return on AI investment. Most start by focusing on expected productivity gains, but this often leads to disappointment. In most cases, especially in SEA, where there are fragmented teams and markets with relatively low labor costs, companies find that productivity gains don't add to the bottom line. There's limited scope to reduce headcount, even when efficiency goes up.

Another common misconception is trying to justify AI through the ROI of individual use cases. This is a narrow and often misleading way to assess AI's potential because it pushes organizations to chase short-term gains rather than long-term transformation.

So, what's a better way to think about AI investment and ROI?

First, when it comes to AI, it's important to note that costs have fallen dramatically (and are still falling), opening up a range of possibilities. In the past, many AI opportunities were ruled out because it cost a lot of money to build large teams to develop bespoke machine learning models. With the advent of LLMs and agentic AI, we're now seeing a long tail of use cases become viable. These may have previously been deprioritized because the returns didn't justify the complexity or cost of deployment.

Second, when it comes to AI returns, organizations need to look beyond efficiency to competitive differentiation and growth. Leaders frame the benefits from AI in two ways: 1) accelerating organizational speed and 2) decoupling revenue and cost growth.

Focusing only on productivity growth or the ROI of individual use cases limits the impact of AI and will often lead to disappointing results. Instead, CEOs should set bold goals around speed and scalability. That means defining KPIs that measure how quickly the business delivers outcomes and how efficiently it can grow.

### **Lesson 3. It's not about productivity. It's about accelerating organizational speed.**

Leading companies are using AI to speed up how their organizations work. By automating low-value tasks, analyzing structured and unstructured data, and generating content quickly, AI helps teams move faster—testing ideas, spotting trends, and making decisions in minutes instead of weeks.

“

As AI becomes more affordable and accessible, CEOs should shift their focus from cost savings and productivity gains to business velocity. The bigger opportunity lies in business growth, and realizing this will require identifying promising use cases, testing ideas with real users, and bringing successful innovations to market.

In today's fast-changing environment, organizations that move quickly will outpace those that want to move perfectly. Falling AI costs are unlocking a long tail of applications that were previously too complex or expensive to pursue. But value doesn't come from the tech alone; it comes from how fast your teams can learn what works, decide which ideas to scale, and adapt operations in response. AI enables speed not just in execution, but in discovering and shaping the right things to execute. That's how you unlock innovation, scalability, and lasting advantage. The key question isn't 'Where can we cut?' It's 'How do we move faster and build smarter?'"

**Dr. Andrew Ng**

Founder of AI Aspire and DeepLearning.AI, Executive Chairman of LandingAI, General Partner at AI Fund, Chairman and Co-Founder of Coursera and Adjunct Professor at Stanford University

AI is also lowering the threshold to operate across SEA markets, making it easier to engage regulators, manage different languages, and serve diverse customers with tailored offerings. Many SEA businesses were shielded by these fragmented markets, but that's changing, with AI making it easier for players to scale across the region. One Asia-Pacific division of a global life sciences company identified regulatory submissions as a critical value driver for new product launches. Bain worked with the division to reimagine the regulatory workflow and developed generative AI tools to dramatically accelerate this function (see *Case Study 3*).

## Case Study 3

**Asia-Pacific division of a global life sciences company****Background**

An Asia-Pacific business was struggling to keep pace with regulatory requirements across markets. Submissions required teams to navigate hundreds of documents per submission and stretched between three to nine months, delaying product launches and putting multimillion-dollar revenues at risk. In addition, delays in responses to regulators were slowing approvals.

**Approach for investment case**

The investment case for AI was anchored on accelerating velocity of regulatory operations to unlock speed to market. Bain partnered with the company to fundamentally reimagine its regulatory workflow and increase speed across filing cycles. Two generative AI tools were designed: a copilot for document extraction and Q&A, and a submission tool to translate and generate tailored filings by market. Humans in the loop remained fundamental to check AI work and speed up the overall pace of filing. This shift will enable teams to move faster, reduce submission timelines, and accelerate launches.

**Impact** **+\$100M**

additional potential  
revenue from new  
products over  
three years

 **40%–60%**

estimated reduction  
in time to filing

 **70%–80%**

reduction in response  
time to regulators



Take another example of a global food company that wanted to supercharge the speed of its marketing campaigns. Working with Bain, the company successfully implemented a completely new creative production platform to deliver this acceleration (see *Case Study 4*).

#### Case Study 4

### Global food manufacturing company

#### Background

A global food company identified marketing acceleration as a key lever to drive growth and differentiate from its competition. Weeks-long campaign production cycles were limiting the ability to test, pivot, and launch campaigns at speed.

#### Approach for investment case

The investment case was focused on accelerating the velocity of marketing campaigns to enable rapid customer activation. The company teamed up with Bain to overhaul its creative production process using generative AI, building a platform that transformed brand guidelines, product prompts, and imagery into deployment-ready content in hours. The system reimaged the entire workflow, from creative briefing and asset generation to testing, enabling teams to ideate, produce, and go live in a day across channels, products, and personas.

#### Impact

**99%**

reduction in campaign production time, from weeks to a few hours

**50%–70%**

reduction in creative and production costs

“Interest in this solution has been significant. Even the e-commerce team wanted to use it to automate content production for their global e-retailers.”

—Company Executive

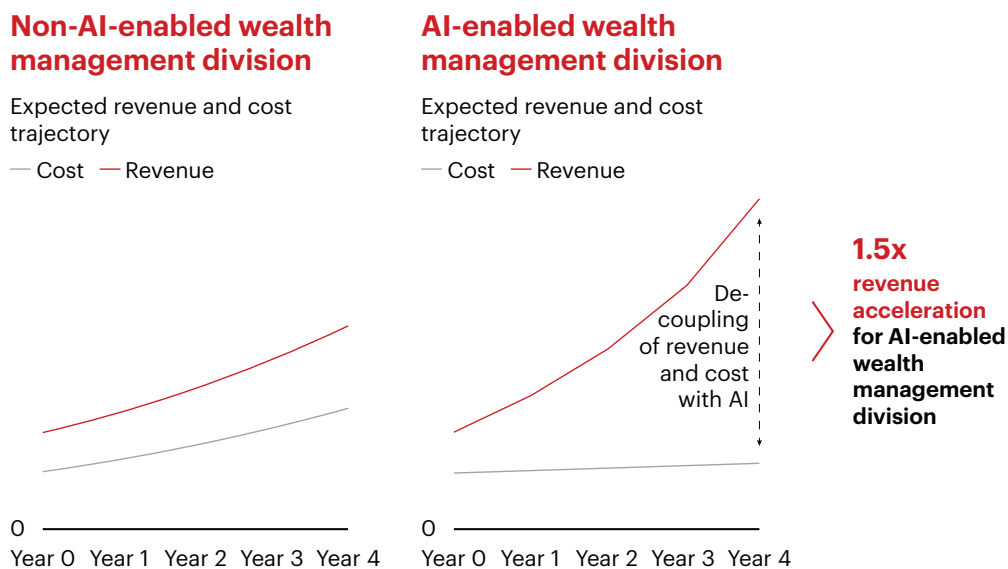
#### Lesson 4. Decouple revenue and cost growth.

Once companies build speed, the true value of AI is in changing the economics of growth. By redesigning key parts of their commercial or delivery models, companies can unlock growth without expanding headcount.

Consider an example from the financial services sector (see *Figure 2*). Traditionally, banks have scaled their wealth management businesses by adding more relationship managers. In our work with a leading SEA wealth manager, we helped the firm equip its commercial teams with AI tools, boosting productivity and expanding capacity. Over four years, this dramatically shifted the growth model of the business, without increasing the size of the sales team.

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**Figure 2:** Decoupling of revenue and cost growth in AI-enabled wealth management



Sources: Bain analysis

In another example, we helped a global technology solutions company transform its commercial capabilities across sales, marketing, and customer servicing (see *Case Study 5*). This has unlocked significant capacity to drive growth in the existing team.

## Case Study 5

**Leading global technology solutions company****Background**

A global tech company was facing slowing growth and rising costs. Frontline teams were bogged down by administrative work and fragmented systems, limiting commercial throughput. Growth was held back by bottlenecks in frontline teams, limiting scalability.

**Approach for investment case**

The investment case for AI was focused on unlocking frontline productivity to accelerate growth without increasing the cost base. The company partnered with Bain to lead a transformation across commercial capabilities. In Sales, generative AI assistants were rolled out to over 20,000 sellers, giving them faster access to materials, automating administrative tasks, and enabling them to focus more time on selling. In Marketing, generative AI tools streamlined the content creation process end to end, significantly reducing turnaround times. In Customer Service, AI analyzed support data to proactively guide customers and resolve issues faster. Generative AI-powered chatbots and copilots helped scale service delivery without the need to grow headcount.

**Impact****\$200M+**

sales capacity by  
freeing up sales  
team time

**>50%**

faster content  
cycle time in  
marketing

**30%**

customer  
service cost  
reduction

**20%–30%**

of a multibillion  
cost-saving target  
realized in one year

These examples point to a different way of thinking about AI. CEOs need to focus less on technology for its own sake and more on how it drives business outcomes. When that becomes the goal, teams can stop chasing tools and start building real impact.

## Chapter 3: How do we orchestrate the transformation?

Most companies in SEA have already started using AI. The basics are in place, but what will define success for these companies isn't only what they focus on, but how effectively they turn early efforts into real change across the business.

That's easier said than done, especially in a region as complex as SEA. Markets are fragmented. Infrastructure is inconsistent. Digital maturity varies widely. A one-size-fits-all approach won't work. From our work with clients in the region, two critical lessons consistently make the difference between stalled pilots and lasting impact.

“

AI business products are transforming enterprises by helping employees work more productively, efficiently, and even more strategically. At OpenAI, we've worked with innovative local companies like Grab and Singapore Airlines to unlock real business value through AI.

For forward-thinking CEOs, the roadmap should balance breadth as much as depth: Make AI adoption simple across functions, empower teams to experiment, invest in internal capabilities, and scale proven use cases across the organization. We're now seeing companies across the region move beyond pilots to business-wide adoption, with AI becoming core to how they operate.”



**Oliver Jay**  
Managing Director of  
International, OpenAI

### Lesson 5. You have the talent you need; now it's about activating it.

When CEOs think about scaling AI, the conversation often turns to hiring and the scarcity of talent. However, in most cases, the people needed to deliver an AI transformation are already inside the organization. Instead of hiring large teams of data scientists, organizations should mobilize existing employees to apply the technology and reimagine ways of working.

This kind of change management happens with two parallel efforts: the **Lab** and the **Crowd**.

- **The Lab** is where organizations will need to hire new talent. This is where CEOs place bold bets and reinvent core business processes. That means engaging business leaders and subject matter experts to develop a vision of the future, deploying technical talent to build new solutions and sponsor changes to deliver business outcomes.

- **The Crowd** is about scale. Companies need to raise overall AI fluency in the organization so employees can spot opportunities, test ideas, and adopt AI in their day-to-day work. AI will not directly displace employees in large numbers, but AI-trained staff will displace untrained staff. This is where organizations should provide new tools, like copilots, that should protect data and make it easy to use AI responsibly.

AI transformation happens when your current business leaders and employees are at the forefront of change. Take the example of a SEA-based global commodity trader that reinvented its procurement function. The program was led by the chief procurement officer and his core team, bringing critical expertise to reimagine business processes and engage with the broader procurement team to drive adoption (see *Case Study 6*).

#### Case Study 6

### Southeast Asia-based global commodity trader

#### Background

A Southeast Asia-based commodity trader was looking to identify the biggest opportunities from AI and identified procurement as a key domain to focus on. The team worked with Bain to design and build a suite of AI tools for their global procurement team.

#### Orchestration approach

The chief procurement officer and a core team of procurement executives were empowered to reimagine the function from the ground up, leading to the deployment of AI tools that accelerated opportunity identification, improved spend visibility, and tightened controls. It was a fundamental redesign of the function, led by those closest to the work.

The rollout of these solutions involved multiple rounds of deep engagement with users throughout the journey in order to build understanding, alignment, and sponsorship for the tools. In addition, various processes were adjusted to encourage the use of the new tools, such as integrating reports from AI tools in monthly business updates. Success would not have been possible without the significant change management effort led by the functional team.

#### Impact

**115+**

executives  
engaged  
across 10+  
countries

**88%**

NPS of AI  
platform in the  
procurement  
team

**\$50M+**

value delivered  
in less than  
three years

“This platform is highly  
impressive. ... I don’t think  
I have seen this innovation  
before in any other organization.”

—**Procurement Executive**

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In another example, consider an Asian insurer that embarked on a bold mission to transform its commercial team. The frontline agents were actively engaged to shape the platform features and eventually serve as “change agents” to encourage uptake (see *Case Study 7*).

## Case Study 7

**Leading Asian insurer****Background**

A leading Asian insurer set out to accelerate growth with AI-powered tools to boost the productivity of its agency channel. To fast-track the journey, the company partnered with Bain to drive the initial phase of the transformation.

**Orchestration approach**

Change management and talent activation were embedded in the AI transformation from day one: Commercial leaders were empowered to completely redesign how their teams worked, and frontline agents were actively engaged to define priority use cases, shape platform features, and eventually serve as “change agents” to drive adoption across the field.

In close collaboration with commercial teams, Bain first focused on agent performance management—developing an AI platform for real-time KPI tracking and proactive performance alerts. The AI solution was integrated into the process for performance management dialogues. Following its success, the company is now scaling generative AI use cases, rolling out tools for top-of-funnel targeting and hyper-personalized outreach to transform the sales journey end to end.

**Impact****20+**

advisors engaged in co-shaping priorities and platform features

**500+**

advisors participated in the pilot before full-scale roll out

 **+5%**

sustained value uplift on a scale business

“

The exponential growth of AI is a generational opportunity for organizations to unleash more of their potential to new customer segments and markets. AI should be part of the array of toolkits to supercharge our employees to do more than they could previously achieve. The end goal at DBS is to drive transformation of our business operating models, beyond mere productivity saves. Fundamentally, management needs to bring staff along in this journey through training and creating new opportunities. The unstinting focus on data quality and risk management are not negotiable and are areas we continually work hard on at DBS.”



**Tan Su Shan**  
CEO, DBS

#### **Lesson 6. Invest in data. Data is your biggest enabler (or will be your biggest bottleneck).**

CEOs hear about what it takes to enable AI: partnerships, talent, risk, governance, technology stacks, and architecture. These all matter. But from a CEO’s perspective, data is the single biggest enabler. Data is where most of the effort, investment, and complexity will sit, often accounting for more than 50% of the heavy lifting. The quality, availability, and usability of your data will ultimately determine the potential and scale of your AI transformation. In a recent Bain survey (see *Figure 3*), we found that 79% of data foundation leaders expected higher revenue growth vs. competitors, and 88% expected profitability increase vs. competitors.

To make this more tangible for CEOs, a strong data foundation typically starts with a single source of truth for core structured data, such as customers, products, and the attributes attached to them. Generative AI then unlocks a range of unstructured data: customer conversations, contracts, product manuals, policies, marketing content, video feeds, and regulatory documents to augment traditional financial and operations data. For generative AI to work well, this unstructured data must be high quality, privacy compliant, and up to date.

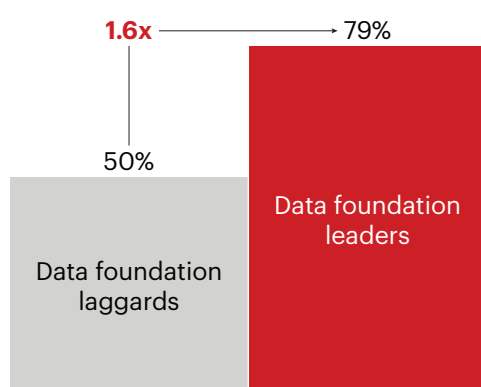
Building toward this state takes time and investment. The most effective approach is to work backward from domains and use cases to identify the data required, while ensuring that data prepared for one use case can be reused for others with the right permissions.



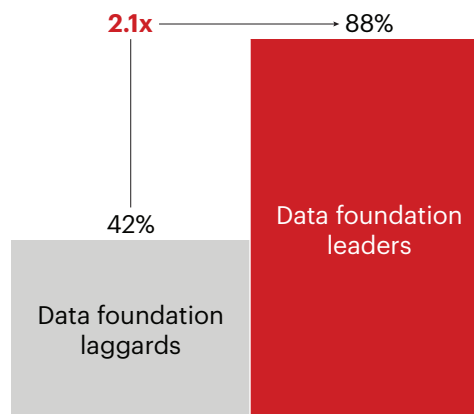
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**Figure 3:** Data leaders set to capture the most value from AI transformations**Revenue growth vs. competitors**

Percentage of respondents who answered "better" or "much better" than competitors

**Profitability increase vs. competitors**

Percentage of respondents who answered "better" or "much better" than competitors



Notes: Leaders are defined as those respondents who landed in the 90th percentile (top 10%) on a scale from 1–5 on nine pre-defined metrics (e.g., data and analytics strategy, operating model); laggards are defined as being in the 10th percentile (bottom 10%); maturity scores are based on how much respondents agreed to each statement, from "strongly disagree" (1) to "strongly agree" (5)  
Source: Bain's Data and ML foundation survey

In SEA, the data challenge is even greater. Systems are fragmented, formats and languages vary, and manual entry is still common. Clean, usable data is hard to come by, which makes proprietary data sets even more valuable. One leading SEA telco (see *Case Study 8*) is already capitalizing on this by launching a new venture to monetize its vast proprietary data.

## Case Study 8

**Market-leading Southeast Asia telco****Background**

The telecom arm of a major Southeast Asia conglomerate needed new value drivers to boost overall group valuation. With a massive data footprint, the company saw an opportunity to build and monetize AI solutions using its underleveraged data assets.

**Orchestration approach**

In collaboration with Bain, the company launched a new digital venture to develop AI-enabled use cases for conglomerate verticals, leveraging the company's vast data assets.

The venture took a deliberate, multi-stage approach, grounding data investments in tangible business outcomes from the start. It started by integrating and cleaning data from priority business units, each aligned to a clear, monetizable AI use case (e.g., AI-led customer segmentation or generative AI-enabled campaigns). This allowed for early delivery of visible wins, building momentum. As traction grew, more data sets were refined and brought onto the platform to scale AI models and drive impact across business divisions over time.

**Impact****>\$1B**

expected enterprise  
value of new data venture,  
anchored on AI solutions

— Elevated AI capabilities across business uses —

**>200 customer segments**

defined through AI-led  
customer segmentation  
for Home Wireless business

**2–3X**

campaign conversion rates  
via generative AI-enabled  
ads for Wi-Fi business

Most companies still don't manage data as a strategic asset; it's rarely on the CEO's agenda. Few organizations in the region have a senior data leader at the table. And many still rely on individuals with deep institutional knowledge rather than building a data-driven culture.

The CEOs leading successful AI transformations invest in data, funding the right infrastructure, building proprietary data assets, and making data governance a business-wide priority. If AI is on your agenda, data should be too.

One prominent SEA pharma and healthcare player (see *Case Study 9*) built transformative AI solutions in commercial planning. Sixty percent of the effort focused on preparing high-quality data sets for AI, along with a centralized AI and data capability to lead development in the future.

## Case Study 9

**Prominent Southeast Asia pharma and healthcare company****Background**

A leading Southeast Asia pharma company held significant scale but faced rising operational complexity. Despite generating large amounts of data, it struggled to turn this into insights that could drive efficiency and competitive advantage. Fragmented systems, manual processes, and redundancies slowed teams, but the company recognized AI as a way to streamline operations and unlock the value of its data.

**Orchestration approach**

Partnering with Bain, the company defined a strategic roadmap, prioritized high-impact AI use cases, and began with finance and procurement to uncover savings opportunities. It then expanded into commercial planning, using AI to sharpen forecasts through market signal analysis. Recognizing the importance of data quality, the company invested in cleaning and integrating data sets with external sources to create a trusted foundation.

To sustain impact, Bain helped establish foundational platforms and launch a dedicated AI function with more than 16 engineers focused on scaling value across the business. Together, they accelerated a pipeline of use cases, delivering tangible, in-year results. A centralized AI and data capability now governs enterprise data, drives reuse, and sustains innovation.

**Impact****\$30M–\$50M**

annualized value unlock across the business

**\$150M–\$300M**

expected enterprise value uplift

Too often, data efforts get bogged down in perfectionism or low-impact work. To get real results, data leaders need to focus on what drives value and not on chasing clean data for its own sake. Based on our experience, four principles stand out:

- **Let high-value AI use cases lead the way.** Don't aim for an all-encompassing, perfect data set. Start with the high-value use cases and build the data backbone needed to support them.
- **Build for usability, not perfection.** "Perfect data" can be an endless pursuit. The goal should be usability. AI itself can help clean, complete, and prepare data to make it more usable.
- **Design for diversity.** In SEA, data comes in many formats, languages, and systems. Build infrastructure that can handle the region's complexity.
- **Establish ownership beyond IT:** Data should be treated as a core asset—with clearly defined business and functional ownership who understand what "good" looks like.

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Asia-Pacific CEOs increasingly recognize AI's potential beyond cost reduction, using it to drive innovation and create new business models. Telkomsel exemplifies this approach with CELYNA, their generative AI-powered incident analysis system that delivers results 21% faster and accelerates resolution times by 83%. For a company serving 150 million Indonesian customers, maintaining service reliability above 99.9% is business critical.

AI success requires viewing technology not as isolated implementations but as catalysts for comprehensive business transformation. Organizations that thrive in the AI era build balanced orchestration models—central teams providing governance while business units drive domain-specific applications. Successful companies like Telkomsel implement this distributed approach, capturing value from numerous smaller use cases rather than few large initiatives. The winners create sustainable competitive advantage by reimagining their organizations through an AI-first lens, fundamentally changing how they deliver value to customers.”



**Jeff Johnson**  
Managing Director,  
ASEAN, AWS

## Conclusion: A CEO playbook for real AI transformation

Amid the noise surrounding AI, the real challenge for CEOs is to find the right ways to lead AI transformations from the top. Most headlines promise a breakthrough, so it's easy to get distracted. However, AI is not just a passing fad. It's a fundamental shift that's redefining how industries operate.

What once differentiated companies—size, legacy, loyalty—is giving way to new moats: intelligence, speed, and adaptability. In SEA, where markets are fragmented and scale is hard-won, the impact of AI-led disruption will be felt deeply, and it's important for companies to understand how these shifts affect their business model.

CEOs need to shape their AI transformations as business transformations (not technology deployments) with a focus on fewer, bigger, and bolder bets to drive results. And when building the investment case, the focus shouldn't be on incremental productivity gains. Real value comes from supercharging organizational velocity and unlocking entirely new growth models. That requires businesses to stop chasing individual use-case ROI and to start thinking about how AI transforms long-term enterprise value.

When it comes to driving the transformation, two things matter most from the CEO's seat: Treat data as your most strategic asset, not just a byproduct of operations, and at the end of the day, focus on people. Build fluency across teams and empower business leaders to drive change from within.

The companies that pull ahead will be those bold enough to rethink how they operate and grow—and disciplined enough to turn AI into a lasting advantage.

SEA CEOs who want to evaluate their AI strategy through the lens of the six lessons in this guide should ask themselves:

- Which domains in my business should I transform with AI to strengthen competitive advantage?
- Where can I accelerate velocity to win and how can I decouple revenue from cost growth?
- How will we orchestrate the change in people, processes, and data to deliver impact at scale?

By working through these six lessons and reshaping your AI agenda accordingly, CEOs can turn today's uncertainty into tomorrow's advantage.

## **Bold ideas. Bold teams. Extraordinary results.**

**Bain & Company is a global consultancy that helps the world's most ambitious change makers define the future.**

Across the globe, we work alongside our clients as one team with a shared ambition to achieve extraordinary results, outperform the competition, and redefine industries. We complement our tailored, integrated expertise with a vibrant ecosystem of digital innovators to deliver better, faster, and more enduring outcomes. Our 10-year commitment to invest more than \$1 billion in pro bono services brings our talent, expertise, and insight to organizations tackling today's urgent challenges in education, racial equity, social justice, economic development, and the environment.

