

AI has changed: What it means, and how to manage the disruption

From AI that talks to multimodal AI that acts. Multimodal AI is moving from content generation toward structured, actionable decisions



Four questions for leaders



01

**What has changed
in AI?**



02

**What are the
implications for
organizations?**



03

**What are the
implications for
leaders?**



04

**How to best
manage this
disruption**

Three shifts redefined AI recently



FROM

Bots that answer



TO

Agents that act

AI now executes work, not just advises on it



FROM

LLMs



TO

Harness engineering

Value moved from the model (the brain)
to the system around it (the body)



FROM

Data engineering

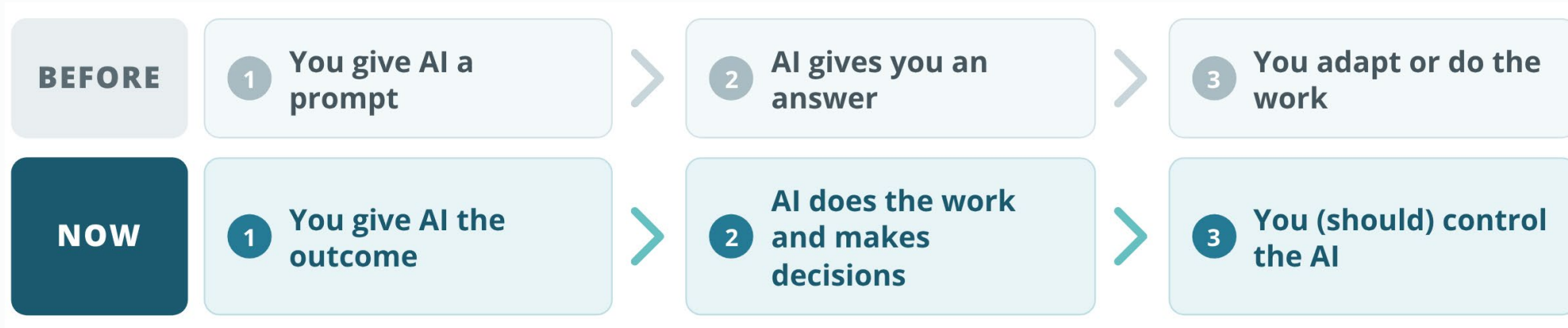


TO

Intelligent engineering

Semantic data that machines can understand and
act on

AI stopped waiting for you, it keeps working



This is a game changer. AI is stopping to be software you can use, to be a labor you direct.

A labor that can work faster, that has more intelligence power than humans, that is becoming cheaper everyday, that is improving itself every day.

However, for **AI to work well for you**, you have to explain very well what is a good outcome and what has to be done, which data to use, define the guardrails well, define what decisions go to the machine and remain human, monitor at all times, maintain human ultimate control and adjust your business model and organization.

It is this process, beyond the AI technology you use, that is the real work of **becoming AI-native**.

It is not just giving access to AI to everybody. It is a transformation process that needs to be well structured and anchored in your business strategy.

Supply is being built ahead of demand

SUPPLY INVESTS

Hundreds of billions a year

In chips, data centres and energy



DEMAND MUST PAY FOR IT

Value created by AI users

Enterprise productivity, new revenue and consumer spending



Whether it will, and how fast, is the core of today's "AI bubble" debate.

Six layers build AI capability, and all six moved this year

WHAT CHANGED IN THE LAST 12 MONTHS

Applications & agents

Where users see value.
Crowded, low barriers

Fragmented,
where companies
differentiate

From chatbots to agents that act: coding agents, computer use, Copilots rebuilt agent-first. Value moves to whoever owns the workflow.

Platforms & tooling

Orchestration, data layers, agent frameworks

MCP became the standard way to plug agents into tools and data, now under the Linux Foundation. Harness and context engineering rose.

AI models (LLMs)

The reasoning engine of the stack

◀ **The brain**

Frontier releases every few weeks: GPT-5.x to GPT-6, Claude Opus 4.5 to Claude 5, Gemini 3 to 3.5. Open models (DeepSeek V4) close behind.

Cloud & data centres

Compute capacity, utilization, financing

Capital-heavy,
concentrated in
a few players

Big Tech AI capex near \$700B in 2026; record funding rounds (OpenAI \$122B at an \$852B valuation). New campuses of 1–4 GW per site.

Semiconductors

GPUs, memory, chip manufacturing

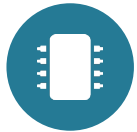
NVIDIA Vera Rubin in full production. HBM memory is sold out through 2027 and now a key bottleneck; export controls shape access.

Energy & water

Grid capacity, long investment cycles

Power is the binding constraint: a projected ~49 GW US data-centre shortfall by 2028 (Morgan Stanley). Firms 'bring their own power': gas, nuclear, storage.

Agents change what is sold, and who buys



Far more computing

Agents use far more computing than chatbots.



From per user to per result

Pricing shifts from paying per user to paying per task or result.



Cheaper means more

Falling AI prices are likely to increase total use rather than reduce spending.

FIVE KINDS OF BUYERS



Consumers

AI in daily life and work



Enterprises

Largest pool of value, slowest to adopt



Governments

Building national AI capacity



Developers

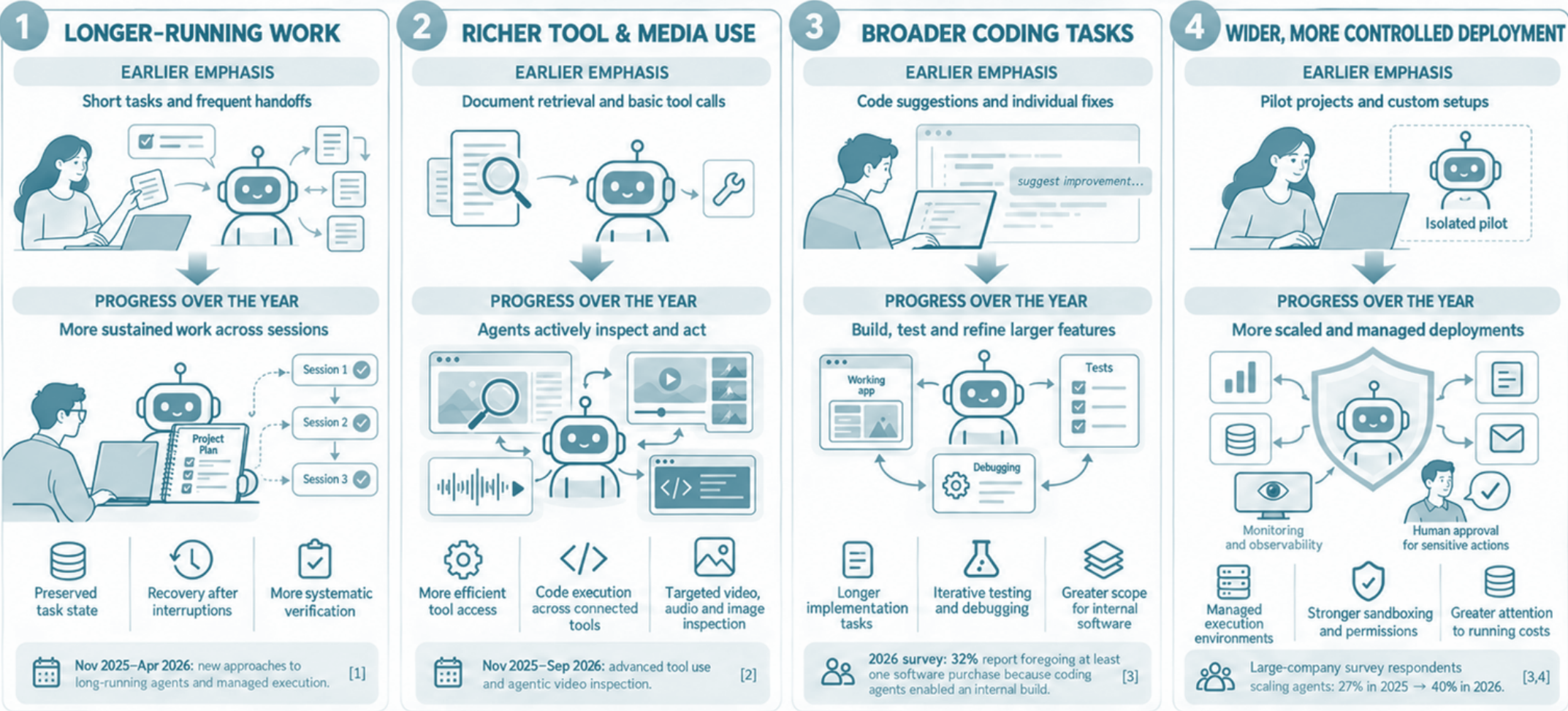
Building on models and platforms



Agents

Transacting with other agents

What changed in Agentic AI



THE SHIFT: Longer tasks • Richer tool use • Broader coding scope • More operational deployment

Capabilities existed before this period; the change is their maturity and adoption. Progress remains uneven.

[1] Anthropic Engineering, Nov 2025–Apr 2026 [2] Anthropic, Nov 2025; Google DeepMind, Sep 2026
[3] McKinsey State of AI, Aug 2026 [4] Anthropic Managed Agents, Apr–May 2026

THE DEMAND SIDE

Six layers turn capability into value

End users and customers

Consumers, employees, citizens, and agents buying from agents

Adoption, trust, willingness to pay

Use cases and outcomes

Productivity, growth, new products, better decisions

Must show measurable return

Redesigned workflows

Processes rebuilt around agents, not AI added on

Where value is actually captured

Organizational readiness

Leadership, skills, change management, decision architecture

Slow, human, often underestimated

◀ The bottleneck

Data and context

Data quality, semantic data, knowledge, integration

Gates what AI can do in a company

Trust, governance and regulation

Accountability, security, ethics, social acceptance

The licence to operate

Supply has the brain. Demand has the bottleneck.



SUPPLY

Concentrated and capital-heavy

Built by a few players with chips, power and data centres.



DEMAND

Fragmented and capability-heavy

Created one organization and one workflow at a time. It depends on people, data and leadership more than on technology.

Capability is no longer the main constraint. What slows adoption is how fast organizations can absorb AI: redesign processes, retrain people and trust the results. AI is a leadership challenge.

Four issues on the executive agenda



01

Agent accountability

When an agent acts, who answers for the outcome?



02

Conversational interfaces and websites built for agents

Humans now ask instead of search.
Your next visitor, buyer or partner may be a machine.



03

AI slop

Content is now cheap.
Quality and trust are scarce.



04

Overload, ROI and obsolescence

Many new AI tools to use.
Tools and skills now age in months, not years.
How do I obtain real value from AI investments.

02

What are the implications for organizations?

Toward the augmented organization



Intelligence & Execution is becoming cheap. Judgment is becoming scarce.



Capability is democratized

Individuals and small teams can now conceive and deliver what once took whole departments.



Strategy moves upstream

When building is no longer the bottleneck, the premium is on deciding what is worth building.



More options to choose from

Leaders can afford more scenarios and more creative directions to evaluate and choose from.



Top models are table stakes. Advantage lies elsewhere.

THE DIFFERENTIATORS



Context engineering



The judgment and competence of your people



Clear ambition and values



Strategic capacity, readiness and a structured approach

Don't confuse AI with traditional software

With traditional software, everyone gets roughly the same results from the same tool. With AI, there is no level playing field: the same software can lead to very different AI journeys and results.



THE FOUNDATION

Data quality, availability and strategy decide which paths are open to you, whichever model you use.

Four priorities for the organization



Redesign leadership and structure

Decision rights, teams and roles built for people working alongside agents.



Lead the change

As with every technology shock, adoption is a people challenge first.



Channel citizen development

Employees will build fast. With guardrails it creates value; without them, sprawl and risk.



Don't treat AI as software

Running it as an IT rollout is a costly mistake. Results depend on context engineering.

Fewer layers, new building blocks



Flatter organizations

Much of middle management relays information, consolidates reports and coordinates handoffs. Agents do this continuously and at low cost. Expect fewer layers and wider spans of control.



Mixed teams of people and agents

The basic unit becomes a small team of people working with a set of agents. Org charts will show agents too: what each does, who owns it and what it may decide.



From functions to end-to-end processes

Agents work across systems, pulling organizations toward flows such as order-to-cash or idea-to-launch. Processes, not departments, get redesigned.

Smaller units, explicit control



Smaller organizations at the same scale

A team of 10 to 20 people with strong agents could run what once needed hundreds.

Big companies will be pushed to act like collections of small, autonomous units.



New control functions

Agent governance, a person accountable for each agent's results, and teams that own the context agents work from. Every agent action needs a human owner.



Decision rights written down

For each decision, state who decides:

Agent decides alone

Agent recommends

Person decides

Five effects to watch



The talent pipeline breaks

If agents do junior work, where do future managers learn? Apprenticeships must be designed on purpose.



Roles merge

Engineers act like entrepreneurs; executives act like builders. Careers become less linear.



Power shifts

Whoever owns the data and agent setup gains influence, whatever the formal hierarchy.



Uneven adoption

Teams that use agents well will far outperform others, raising fairness and morale issues.



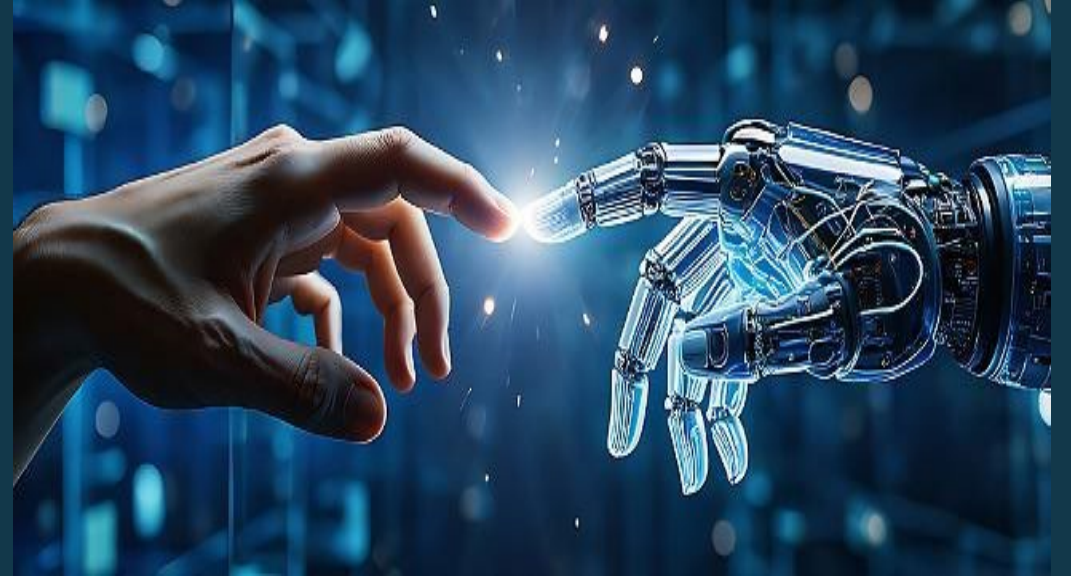
Losing your own capability

Hand too much to agents and you lose the expertise needed to judge their work.

THE BOTTOM LINE

The org chart will change.

**Accountability stays
human.**



03

What are the implications for leaders?

From decision-makers to system designers of augmented organizations



AI is not a technical challenge. It is a leadership challenge.

The companies that succeed with AI will not be those with the most advanced algorithms, but those with the strongest leadership alignment and the ability to turn AI into an everyday operational reality.

NO LONGER

Having all the
answers



NOW

**Building
organizations that
learn and create
value with AI faster
than the competition**



Three factors make the shift profound

1

AI decides who rises and who falls

Like the internet and mobile before it, AI will make and break companies and leaders, only faster.

Leaders who master AI will quickly replace those who do not.

2

The impact will exceed what leaders imagine

AI learns on its own and accelerates every other technology. Generative AI will be followed by humanoids and physical AI.

214× growth in computing power in six years, while its cost falls rapidly.

3

Discernment is the new scarce resource

AI produces results faster than people can validate them. Judgment, not output, becomes scarce.

The greater the impact, the greater the need for leadership.

AI scales the quality of your thinking and organization



Most AI users are making mistakes faster. "Sloppy AI" and unsustainable experimentation are spreading, and people often rubber-stamp an algorithmic result under time pressure, without real thought.

From command to context

TRADITIONALLY

Leaders were valued for making high-quality decisions and guiding people in a direction.

IN THE AGE OF AGENTIC AI

Success depends on designing systems that consistently make good decisions.

LEADERS MUST REDESIGN



How decisions are made



Who makes them



What data drives them

No longer: "What decision should I make?"

But: "How should this decision be made going forward?"

Automate

Improve

Keep human-led

Leading now means asking and directing

1

Are we asking the right questions?

2

How do we direct AI to deliver what we want?

3

Is what we want still the right strategy?

What every leader now needs



AI literacy and strategic capability

Not coding, but knowing what AI can and cannot do, so you can ask the right questions and challenge the wrong answers.



Decision architecture

Decide what to automate, improve or keep human-led, and build safeguards for autonomous agents.



Orchestrating change at scale

Adoption is about behavior, not tools. Mobilize middle managers, learning and multidisciplinary teams.



Governance, ethics and transparency

Manage rising risks such as deepfakes, cyberattacks, protect human values, empathy, and build trust.

From deciding to designing



Designers of the system

The top team designs the system that decides: objectives, rules, data, safeguards.



Strategy is the bottleneck

Building is cheap. Clarity, values and stopping bad ideas early become the scarcest assets.



Strategy reviewed continuously

Rolling strategy replaces annual planning, without reacting to every signal.



Hands-on leaders

CEOs build prototypes themselves: closer to the work, but at risk of micromanaging.



New executive risks

Liability for agents, errors at scale, cyber risk, boards asking where AI decides.



Culture and meaning

People look to leaders for purpose and fairness: who is retrained, how gains are shared.

Where the change is biggest: what fades, and what grows



UNDER THREAT

- Coordination
- Reporting
- Monitoring
- Routine approvals
- Passing information up and down



BECOMING MORE VALUABLE

Translating change into practice. Redesigning day-to-day workflows around agents.

Running people and agents together. Assigning work, setting quality, stepping in.

Coaching and development. Growing people as entry-level work is automated.

Judgment at the front line. Knowing when to trust an agent and when to override it.

Owning the context. The knowledge, rules and data that make agents perform.

LIKELY RESULT

Fewer middle managers, but more senior and strategic: process designer, coach and quality owner, with real decision authority.

Roles are converging

TODAY

The AI engineer



BECOMES

A CEO running a team of agents

TODAY

The CEO or entrepreneur



BECOMES

A hands-on builder

Six dimensions of effective leadership



In the age of AI, each dimension is augmented

The six dimensions still hold. What changes is how leaders exercise them: with augmented intelligence, combining human judgment with AI.

The new archetype:
the Collaborative AI Leader

How AI changes each leadership dimension

Leadership dimension	Traditional focus	Impact of AI	New leadership archetype
1. Character and personal skills	Ethics, integrity, emotional intelligence	Algorithmic ethics, emotional authenticity	Ethical AI steward
2. Vision and direction	Inspire and mobilize people	Communicate human purpose through AI strategy	Human-AI visionary
3. Results orientation	Deliver stakeholder value	Manage hybrid performance systems	Orchestrator of human-AI results
4. Innovation and capacity	Drive change and learning	Build AI capabilities and organizational adaptability	AI ecosystem builder
5. Talent and leadership development	Attract and coach people	Develop hybrid (human + AI) talent ecosystems	Collaborative AI leader
6. Business competence	Know the business, act decisively	Integrate business and data intelligence	AI-literate strategic integrator

Which behaviors and assumptions may need to change?



Traditional leadership	AI-era leadership
Decisions by experience	Decisions by augmented intelligence (data plus)
Direction-setting	Sense-making (novelty, ambiguity)
Command and control	Orchestration and collaboration
Efficiency mindset	Learning mindset
Data as input (static use of data)	Data as dialogue (dynamic use of data)

THE TAKEAWAY

**Almost anything can now
be built.**

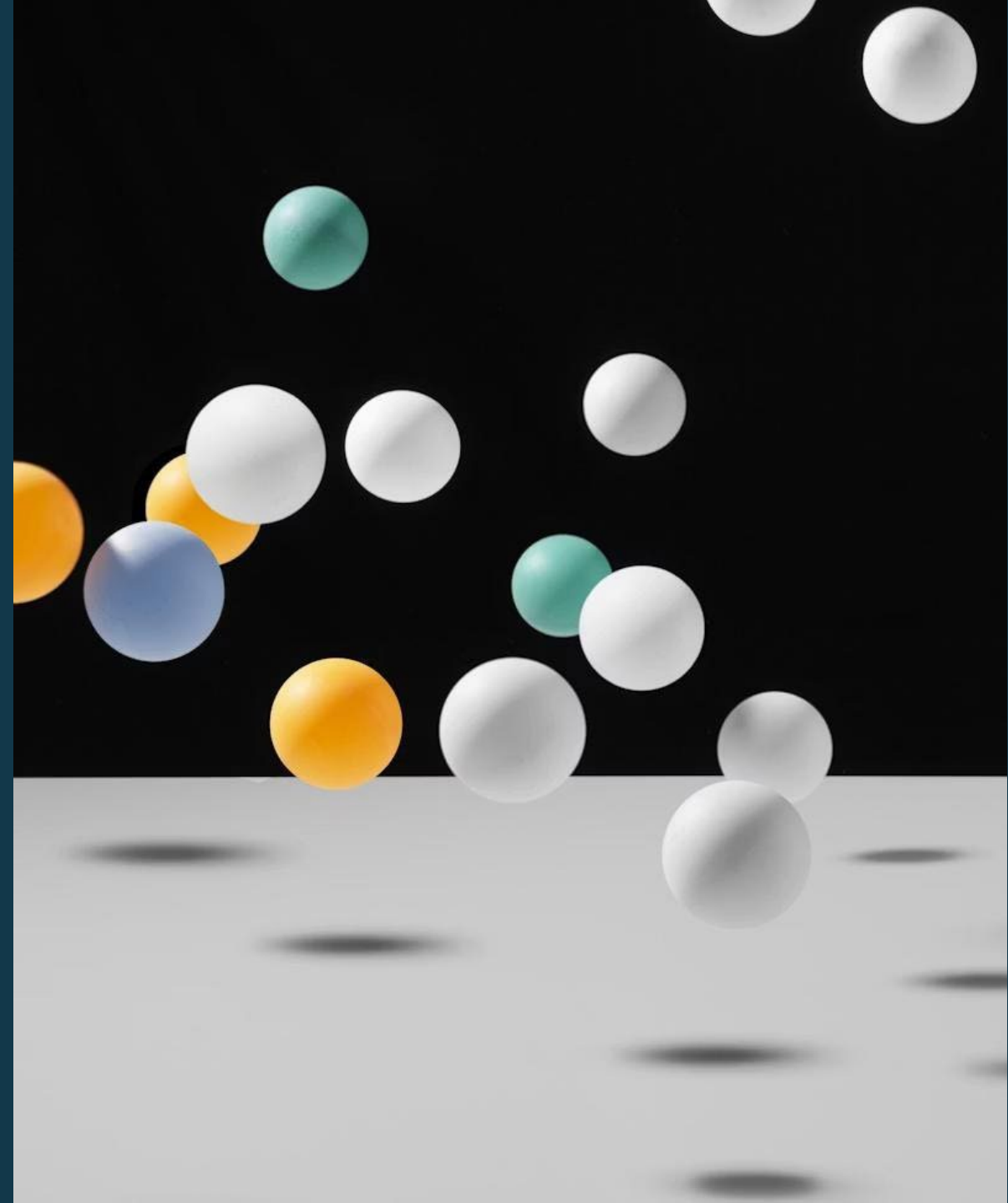
**Leadership is deciding
what should be.**



04

How to best manage this disruption

From insight to action



Returns lag while technology races



THE VALUE GAP

Productivity is not profit

- Gains are scattered: minutes saved per person rarely reach the P&L.
- Time saved becomes value only when work, roles and costs are redesigned.
- Costs are upfront and visible; returns are diffuse, delayed and often competed away.



OBSOLESCENCE

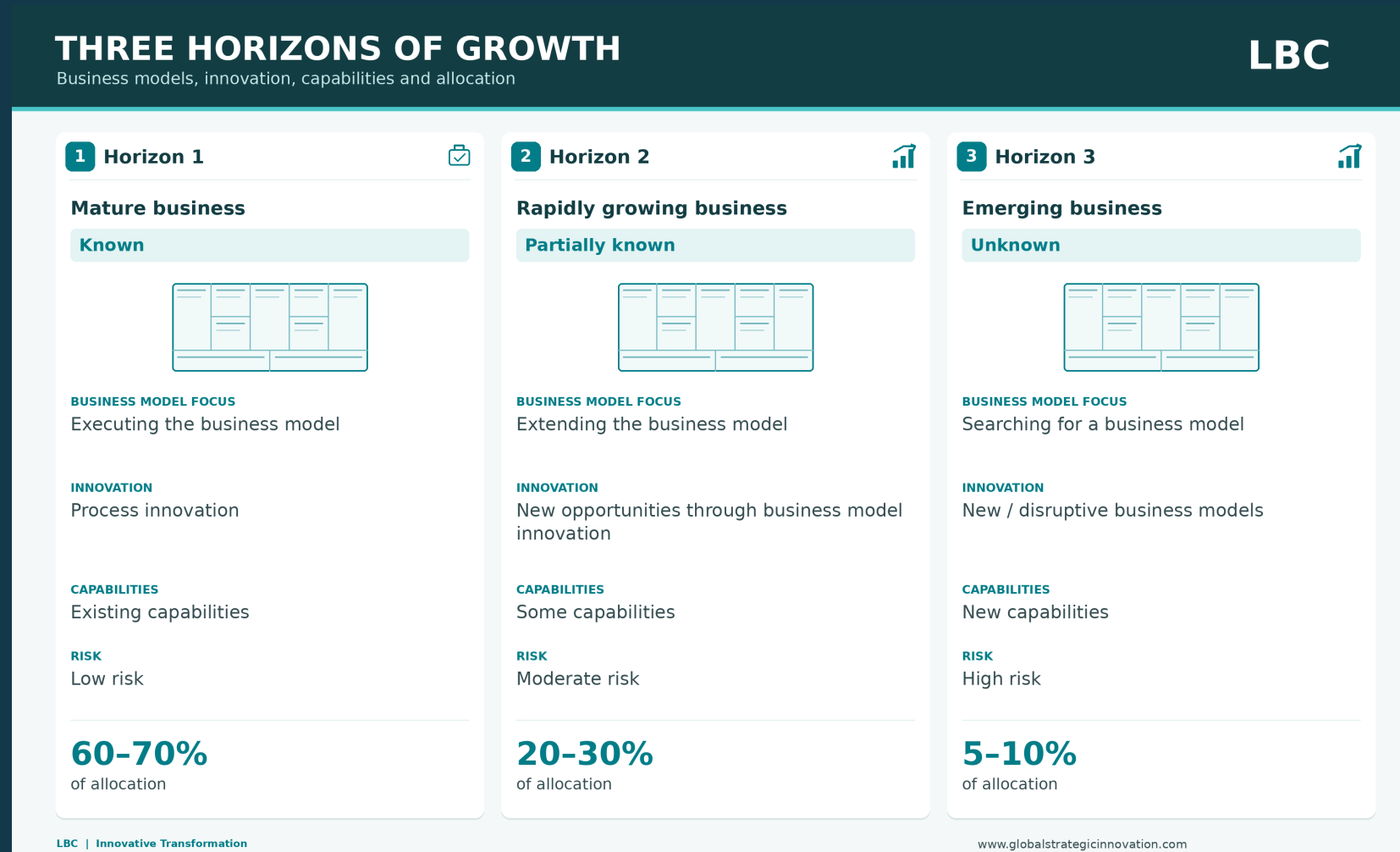
Investments age in months

- Models, tools and platforms leapfrog each other every few months.
- Today's custom build can become tomorrow's standard feature.
- Waiting is no answer: the cost of falling behind compounds.

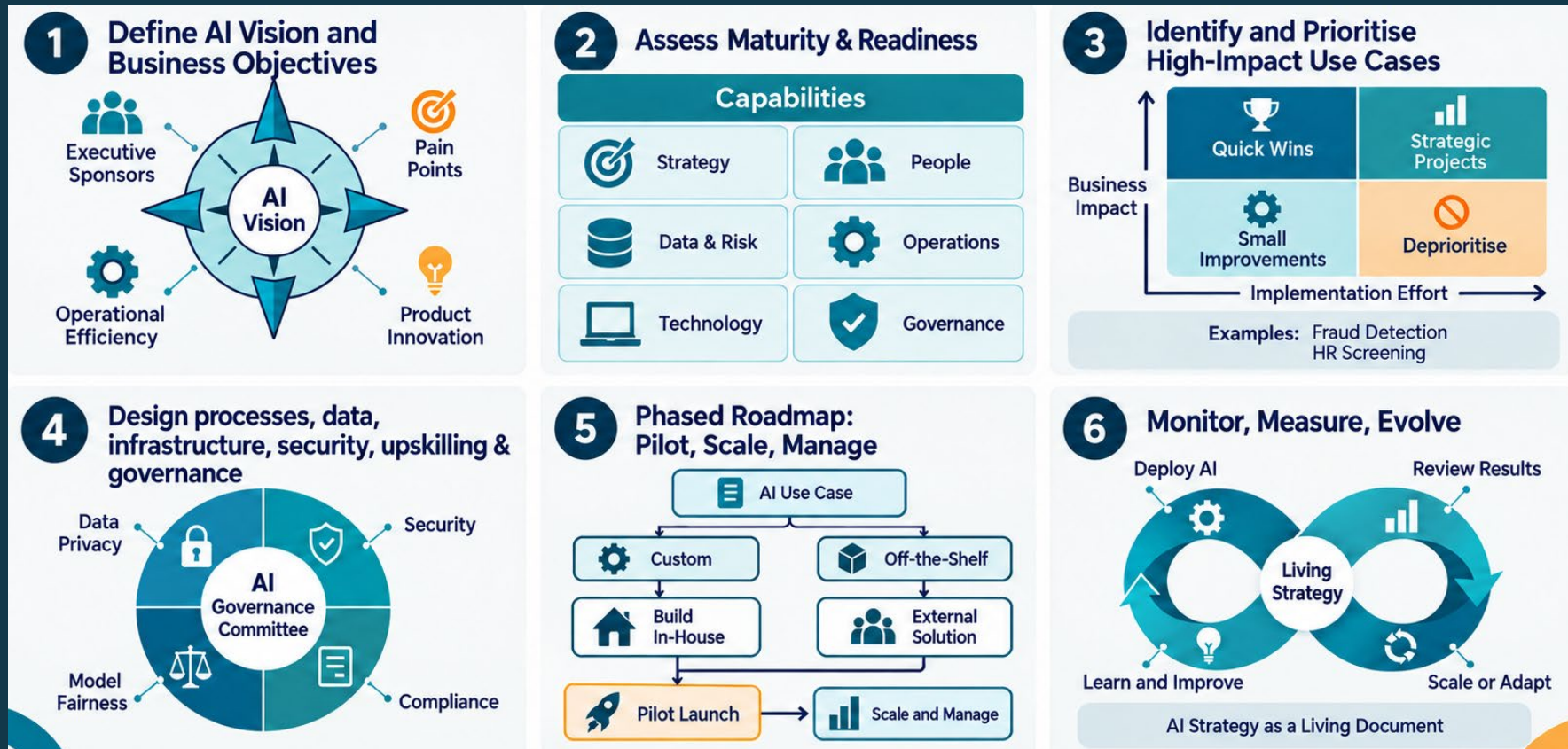
WHAT LEADERS CAN DO

- ✓ Measure value in P&L terms, not hours saved
- ✓ Redesign workflows to bank the gains
- ✓ Build modular, model-agnostic architecture
- ✓ Invest in what lasts: data, context, people

You need an innovation framework. Ex. three horizons of growth



You need a structured strategy and roadmap to aim at exponential growth



Five moves to make now

1

Map key decisions

Assign each to agent, agent plus person, or person only

2

Pilot one end-to-end process

Redesign it around agents, not agents added to old tasks

3

Redefine the middle manager role

And train managers first: they carry the change

4

Set up agent governance early

An inventory of agents, a human owner for each, permissions and audits

5

Protect learning paths

Keep developing junior talent deliberately

THE BOTTOM LINE

AI does not lead. People lead.

Build augmented organizations that create exponential value with AI, where AI is the assistant and people are in control.

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AI Leap Program

From AI experiments to a performance-focused, scaled AI operating model for business leaders

An 8-week engagement that turns scattered AI experiments into a structured roadmap, with the use cases and business plan leadership needs to act.



The starting point

- Where do I start?
- I have started, but need guidance scaling up.
- I have started but need to evaluate ROI and performance and adjust.
- I want to move forward but control costs and build agility

**Weak AI
strategy**

**Fragmented
pilots**

No single owner

**Thin business
case**

We transform organizations,
powering the future with AI

What is the AI Leap?

Questions the AI Leap solves



What is the current state? What is my readiness for scaling?

A benchmarked on current maturity across strategy, use cases, data & risk, technology and people & governance.



What is my ROI? What deserves investment?

What is my current ROI? Which opportunities across the value chain justify the spend, backed by a business case that holds up in a boardroom.



What is the best strategy? How to execute?

AI strategy informed by business strategy, data strategy, operating model, governance structure, budget and action plan with ROI.

Program overview

Three stages Two months One Leap forward

An evidence-based diagnostic led by experts, combining a guided survey, leadership interviews, workshops and analysis of data and documentary evidence.

8 weeks



Stage
1

AI Readiness Assessment

4 weeks

Where you stand today?
What is your readiness for AI adoption?

Stage
2

Opportunity & Use Case Identification

2 weeks

What is worth doing, when?

Stage
3

Transformation Roadmap

2 weeks

How do we get there?

Who is it for?

Built for leaders who want to act on AI confidently



SMEs

Constrained budgets and a real risk of spending on tools that don't pay off. AI Leap narrows the field to what is worth doing first.



Mid-sized enterprises

Unapproved tools in use across departments, disconnected systems and data, no shared AI strategy. AI Leap consolidates this into a single Center of Competence and a coordinated, approved roadmap.



Municipalities

Legacy infrastructure, constrained budgets, sensitive citizen data. AI Leap focuses on a prioritized set of citizen-facing and operational use cases, and a fundable implementation roadmap matched to public-sector capacity and compliance requirements.



Public entities & agencies

Heavy regulatory exposure and compliance requirements, large volumes of unstructured records, strict procurement rules. AI Leap builds a prioritized roadmap that stands up to regulatory scrutiny and procurement rules.

What it is and what it is not?

AI Leap spans diagnosis to actionable implementation

It is designed to bridge the gap between strategic intent and an AI strategy ready for execution.

What it is

- ✓ **Expert-driven diagnostic:** Objective, evidence-backed maturity evaluation led by senior partners with 25+ years of market experience and a network of international experts;
- ✓ **Smart hybrid execution:** Structured data collection paired with direct conversations with the leadership team, so the findings reflect how the organization works;
- ✓ **Holistic operating model:** An 8-week engagement that ends with a transformation roadmap, a governance structure, and an investment plan ready to bring to internal stakeholders, produced by a combination of AI and human intelligence.

What it is not

- ✗ **Superficial self-assessment:** Subjective, unchecked checklist exercises that result in unread IT reports;
- ✗ **Automated template outputs:** Purely software-generated, low-touch report outputs with zero expert review or contextual tailoring;
- ✗ **Siloed tool recommendations:** Ad-hoc setups of fragmented tools that disregard change management, compliance policies or long-term value.

Services and Specializations

AI Center of Competence on top of >400 digital transformation projects and > 1.200 multidisciplinary projects in 18 countries, plus a network of purpose-built international experts and partners.

Services

AI Consulting

- Assessment & Roadmaps;
- Strategy & Operating Model;
- Governance & Compliance;
- Discovery Workshops;
- ROI, Performance Evaluations & Pricing.

AI Academy

- Learning Solutions;
- Executive/Leadership AI Workshops;
- Fundamentals for AI Productivity;
- Management of AI Projects;
- AI Immersion in Silicon Valley.

AI Implementations

- Agentic AI (design, built, deploy, operate & improve);
- AI Pilots, PoCs and Products;
- Chatbot Development;
- Generative AI Development & Solutions;
- UI/UX, Product & Software Development.

Specializations

Intelligent Data

- Data Strategy, Architecture & Management;
- Semantic Data Solutions;
- Data Engineering Services;
- Data Migration & Data Governance;
- Data Analytics and Visualizations/ Cockpits;
- Cloud Migrations.

Intelligent Organization

- AI CoC and Governance;
- Compliance, Ethics, Risk Mitigation & AI Fraud Prevention;
- Leadership in the age of AI;
- The AI Organization;
- AI Change Management.

AI-Powered Transformation & Automation

- Process Optimization Redesign;
- Process & Workflow Automation (agentic workflows: BPM, RPA + AI);
- Agentic Platforms.

What is next?

Ready to take the leap?

Talk to the team:



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