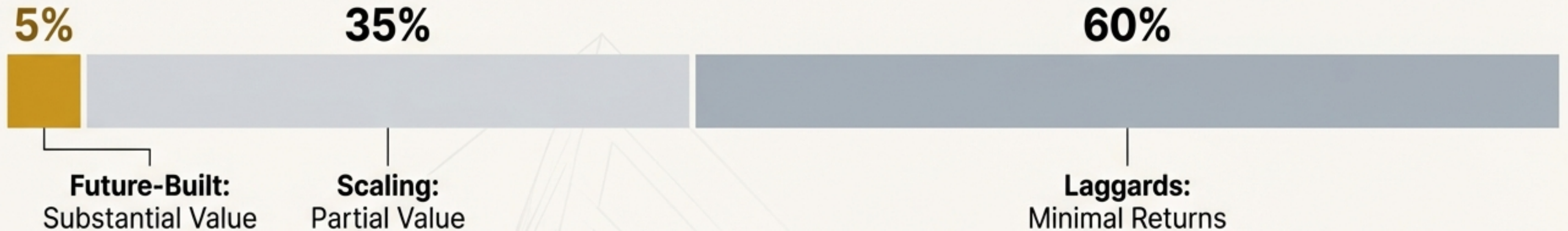


# Your AI Investment Is Failing. Only 5% of Companies Are Getting It Right.



Despite over **\$250 billion** invested in AI in 2024, a massive performance chasm has opened.

**5% of companies** are “Future-Built,” achieving transformative value from AI at scale.

**60% of companies** are trapped in an investment paradox: significant spending with minimal tangible returns.

The question is no longer *if* you should invest in AI, but *why* your investments are **not delivering**.



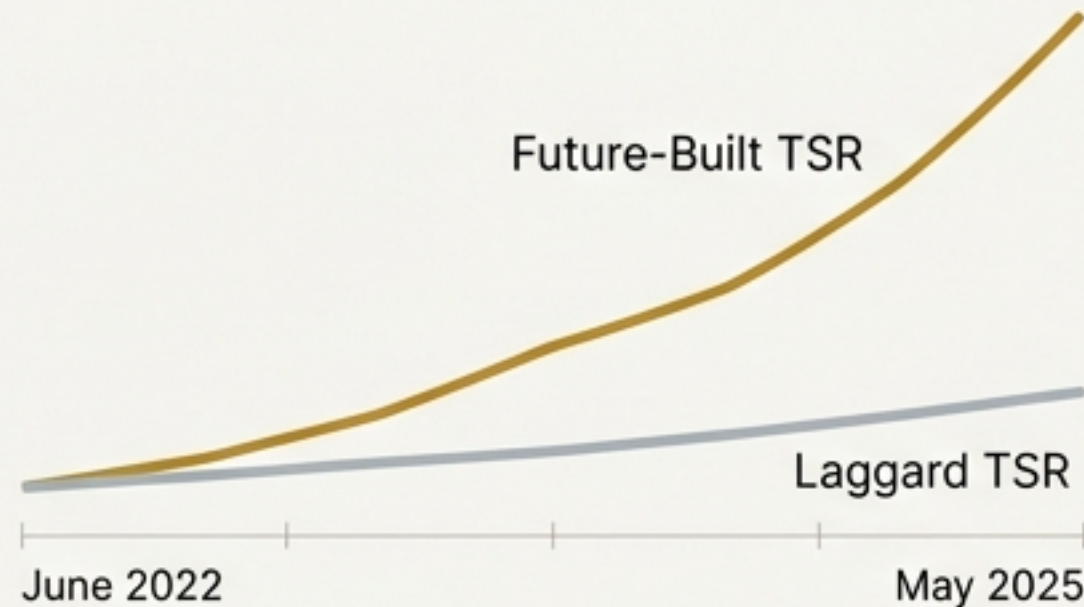
# The Value Gap Is a Performance Gap, and It's Widening.



**3.6x**

## Higher Shareholder Return

'Future-Built' companies delivered 3.6 times greater three-year total shareholder returns (TSR) compared to laggards.



**1.7x**

## Faster Revenue Growth

Leaders achieve 1.7 times more revenue growth, driven by AI-enabled sales, marketing, and new product innovation.



**1.6x**

## Higher Profit Margins

'Future-Built' firms maintain 1.6 times higher EBIT margins, fueled by AI-driven cost reductions and operational efficiencies.



# Two Types of Companies Are Emerging: The Future-Built and The Laggards

## The Future-Built (5%)

### Mindset

Treat AI as a CEO-sponsored, strategic imperative.

### Action

Fundamentally reshape core business workflows.

### Talent

Plan to upskill >50% of their workforce in AI.

### Technology

Operate on centralized, interoperable AI platforms.

**Compounding competitive advantage.**

## The Laggards (60%)

### Mindset

Treat AI as an IT project or isolated experiment.

### Action

Automate discrete tasks incrementally.

### Talent

Plan to upskill only 20% of their workforce.

### Technology

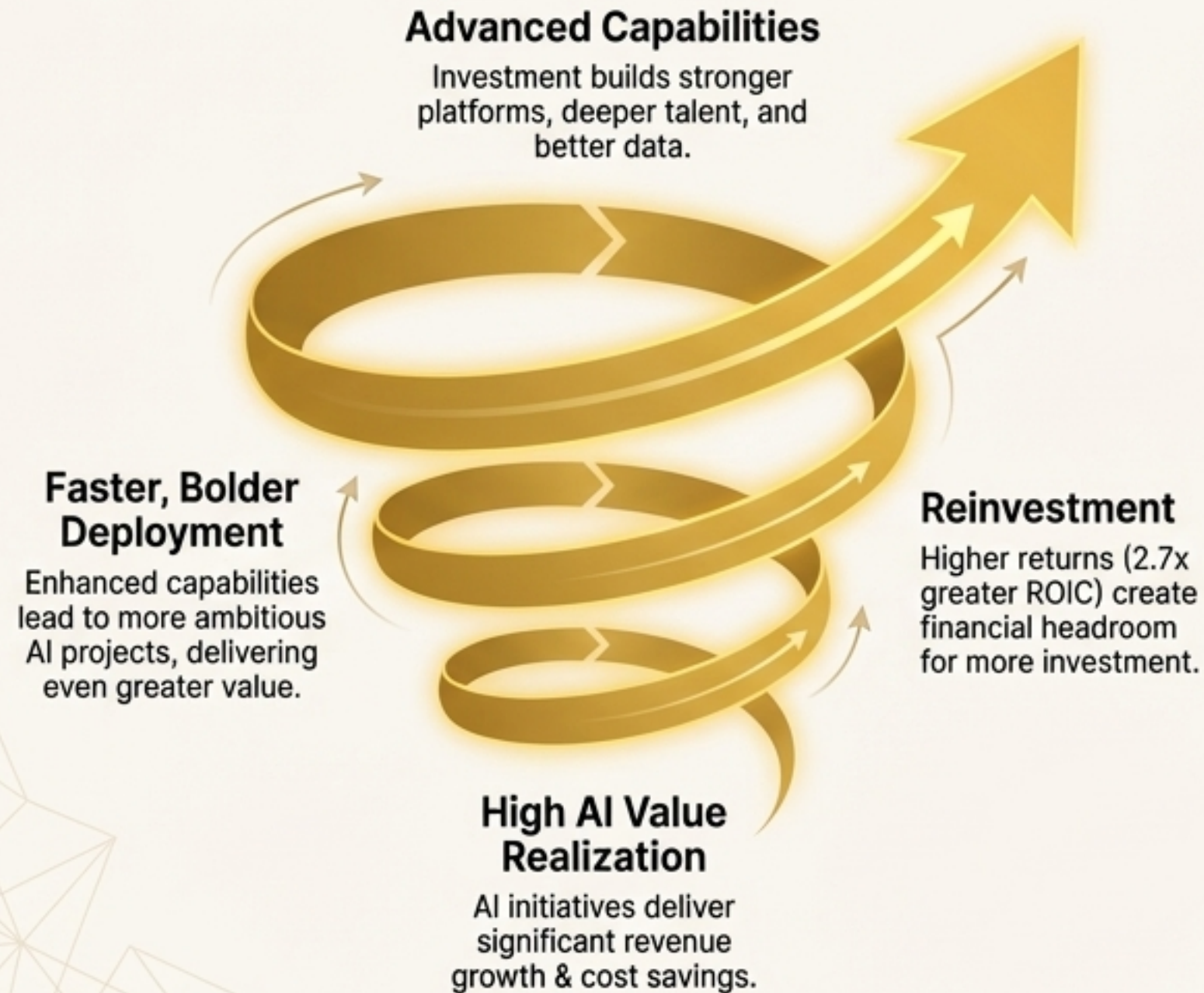
Use a fragmented collection of disconnected tools.

**Stagnating returns and growing capability gaps.**

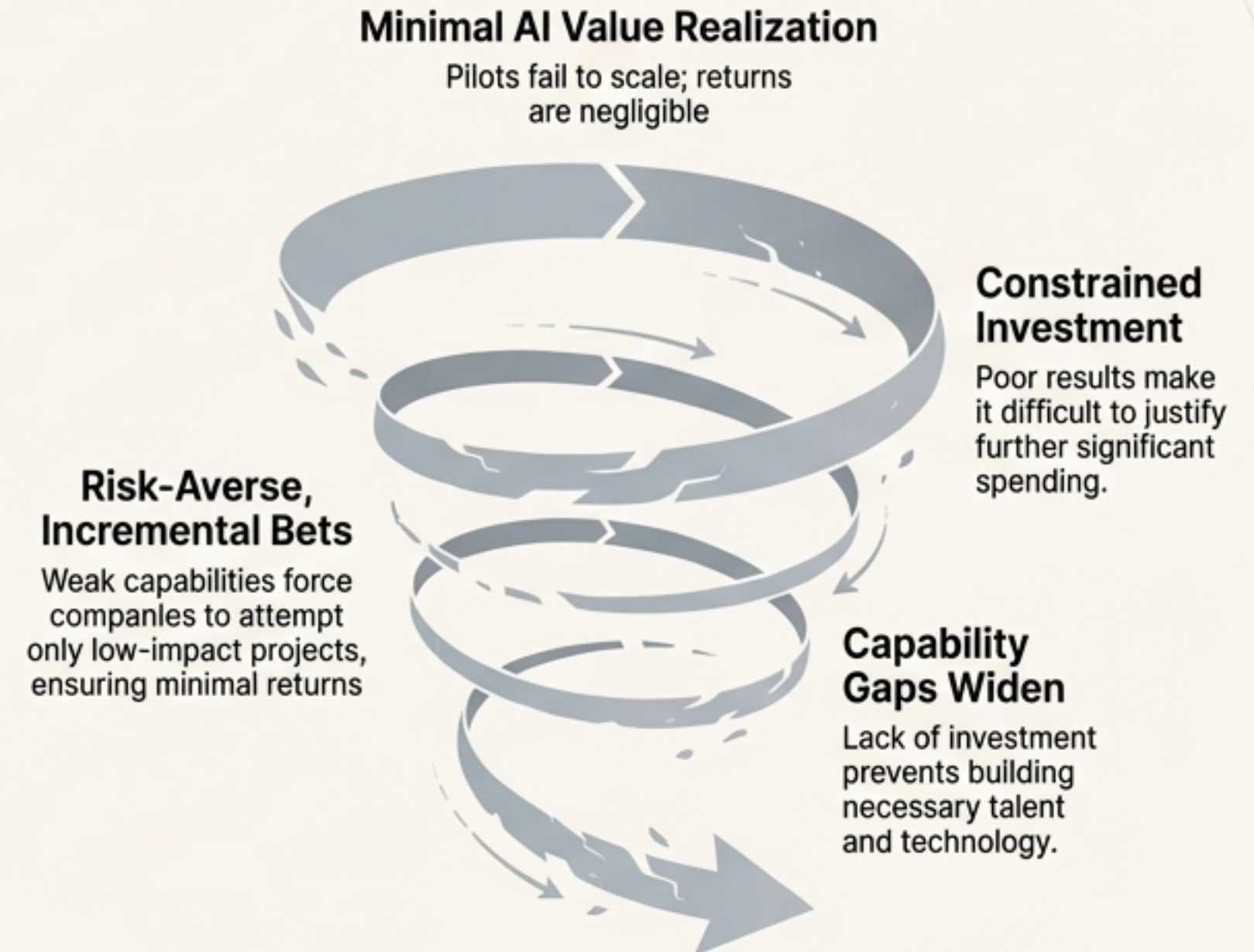


# The Gap Is Self-Reinforcing. Leaders Accelerate While Laggards Stagnate.

## The Virtuous Cycle of the Future-Built



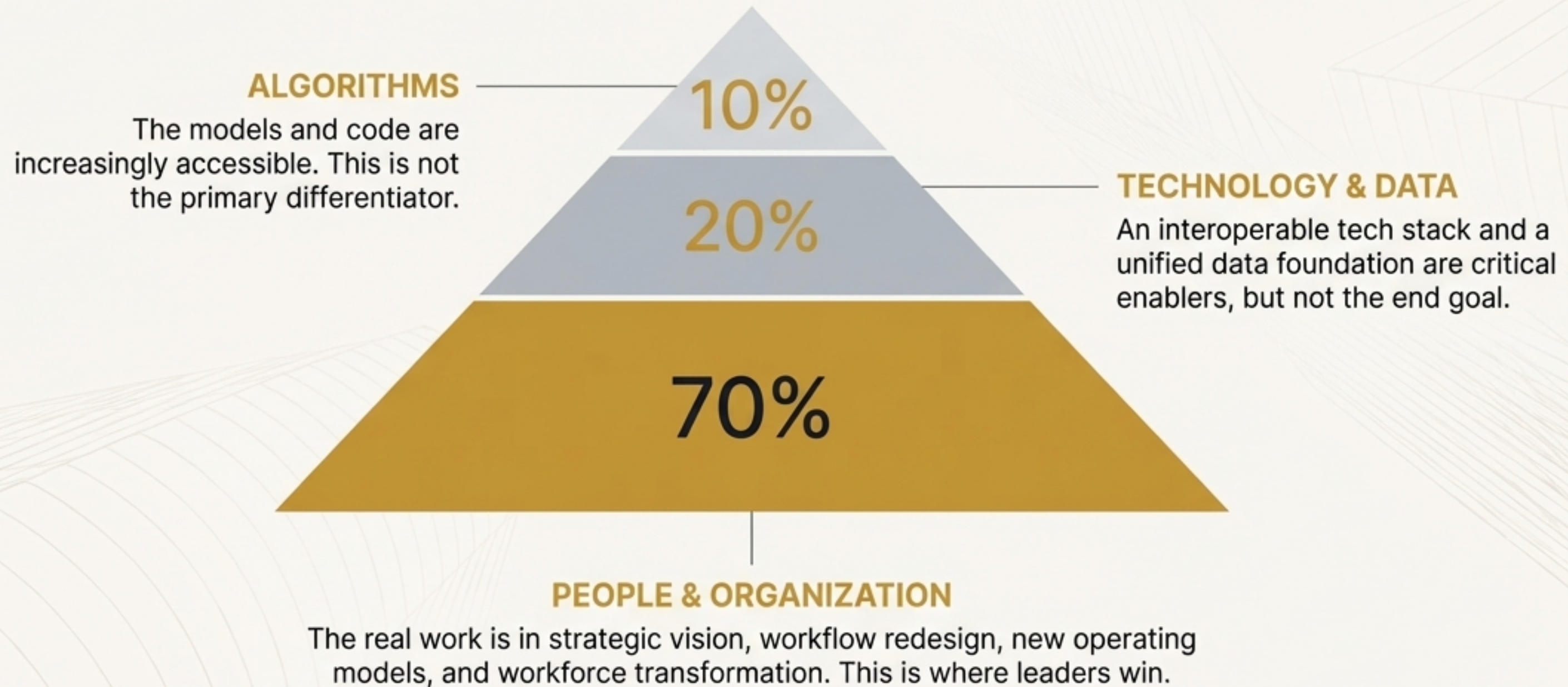
## The Vicious Cycle of the Laggards





Success Is Not a Technology Problem. It Is a Leadership Mandate.

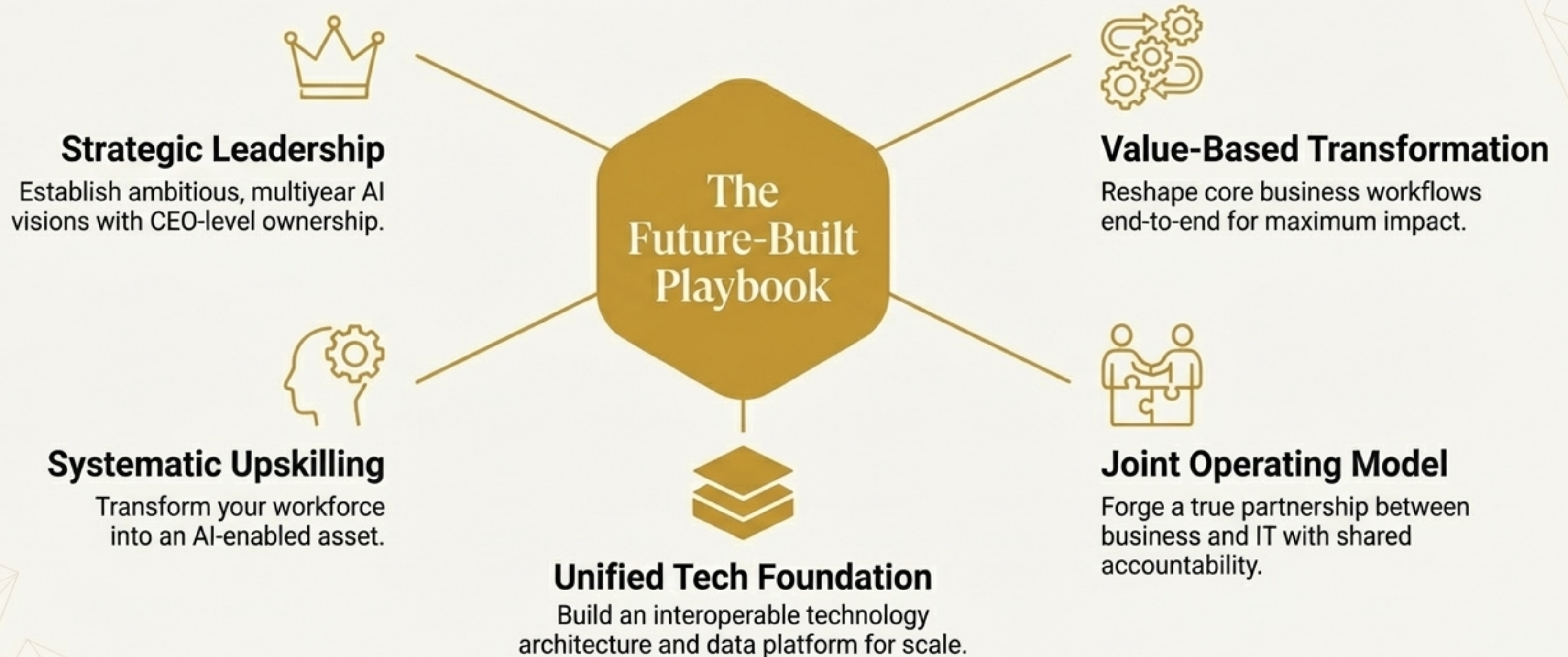
# The 10-20-70 Rule for AI Value Creation



Organizations that approach AI as a purely technical initiative invariably fail to achieve scale and value.



# The Future-Built Playbook: Five Strategies to Close the Gap.

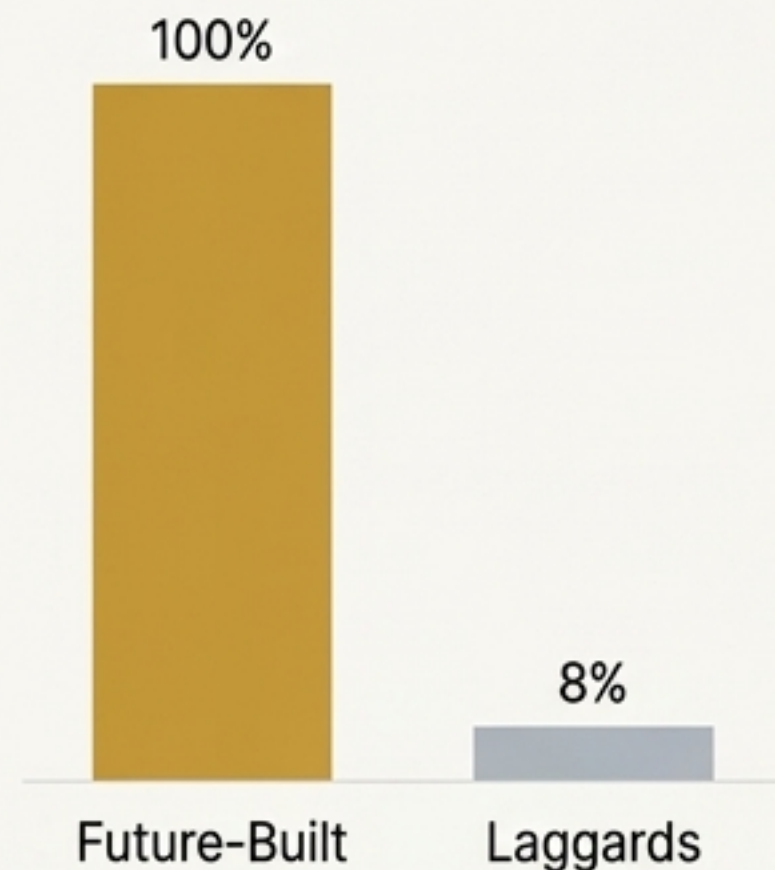




# Play 1: Lead from the Top with Multiyear Ambition

## Key Differentiators

### C-Suite Engagement

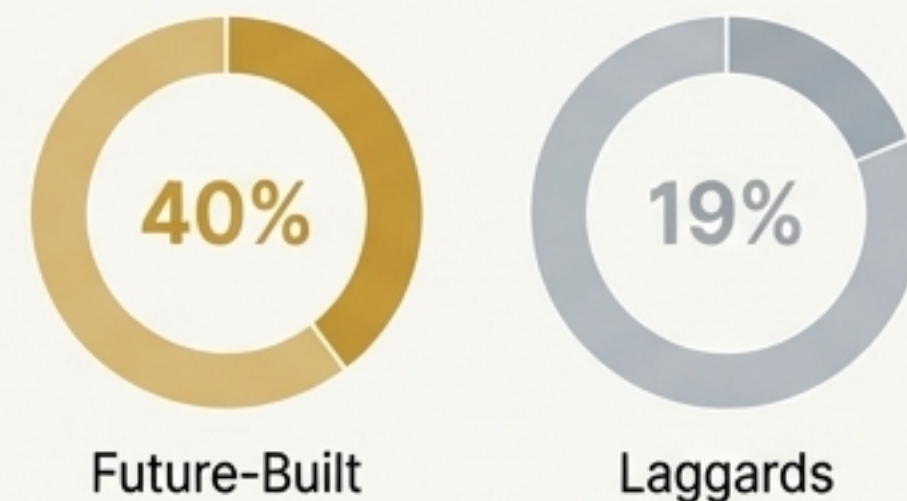


Nearly 100% of "Future-Built" firms report deeply engaged C-suites, vs. only 8% of laggards.

### Explicit Value Targets

Leaders translate business goals into specific, measurable AI KPIs (e.g., time-to-hire, customer satisfaction).

### Board-Level Governance



40% of leaders embed shared AI ownership in governance structures, vs. 19% of laggards.

## In Practice

### A Global Bank's HR Transformation

#### The Challenge

Reinvent the entire HR function from "hire to retire."

#### Leadership in Action

Positioned as a top-down, CEO-sponsored strategic program, not an HR project. Senior leadership visibly steered the initiative.

#### The Outcome

Accelerated transformation with clear accountability and measurable improvements in retention and service cycle times.

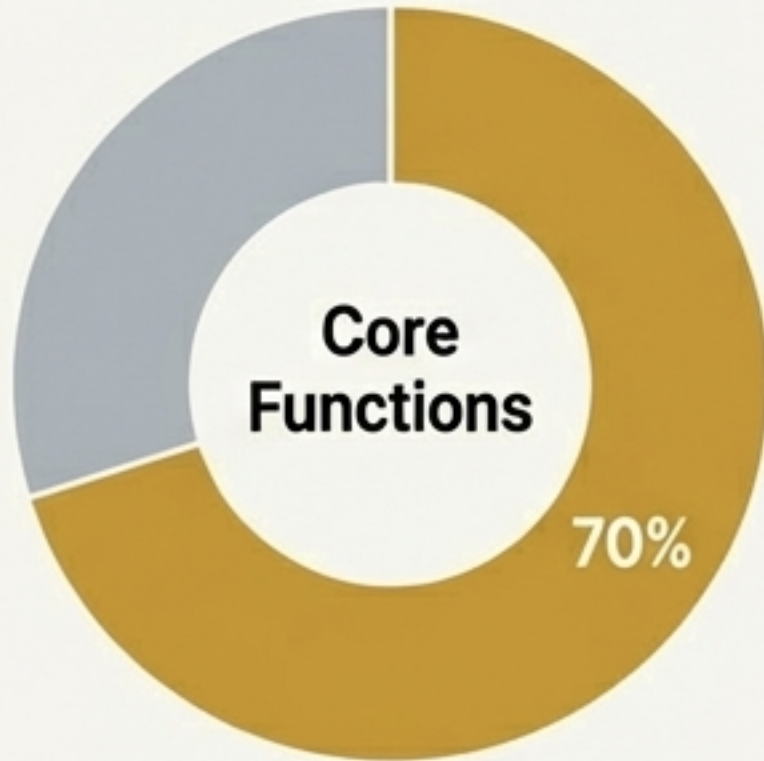




# Play 2: Focus on End-to-End Workflow Transformation, Not Incremental Automation

## Key Principles

### Concentrate on the Core



70% of AI value is generated in core business functions like sales, manufacturing, supply chain, and R&D.

### Reimagine, Don't Tweak

Ask "How would we design this from scratch with AI?" instead of "How can we automate this existing step?"

### Track Value Rigorously

Leaders



Laggards



Over 60% of leaders systematically measure and report AI value, for incessant and report AI value, creating a feedback loop for investment (vs. 17% of laggards).

## In Practice

### A Consumer Products Company's Marketing Overhaul

#### The Goal

Transform the global marketing function.

#### The Method

Mapped all marketing workflows and used a feasibility/value matrix to prioritize AI integration. Fundamentally restructured campaign creation, activation, and measurement.

#### The Results

25-40% time savings in content creation and planning; doubled speed-to-market for campaigns.





# Play 3: Adopt a Joint Business-IT Operating Model with Shared Accountability

## The Winning Structure

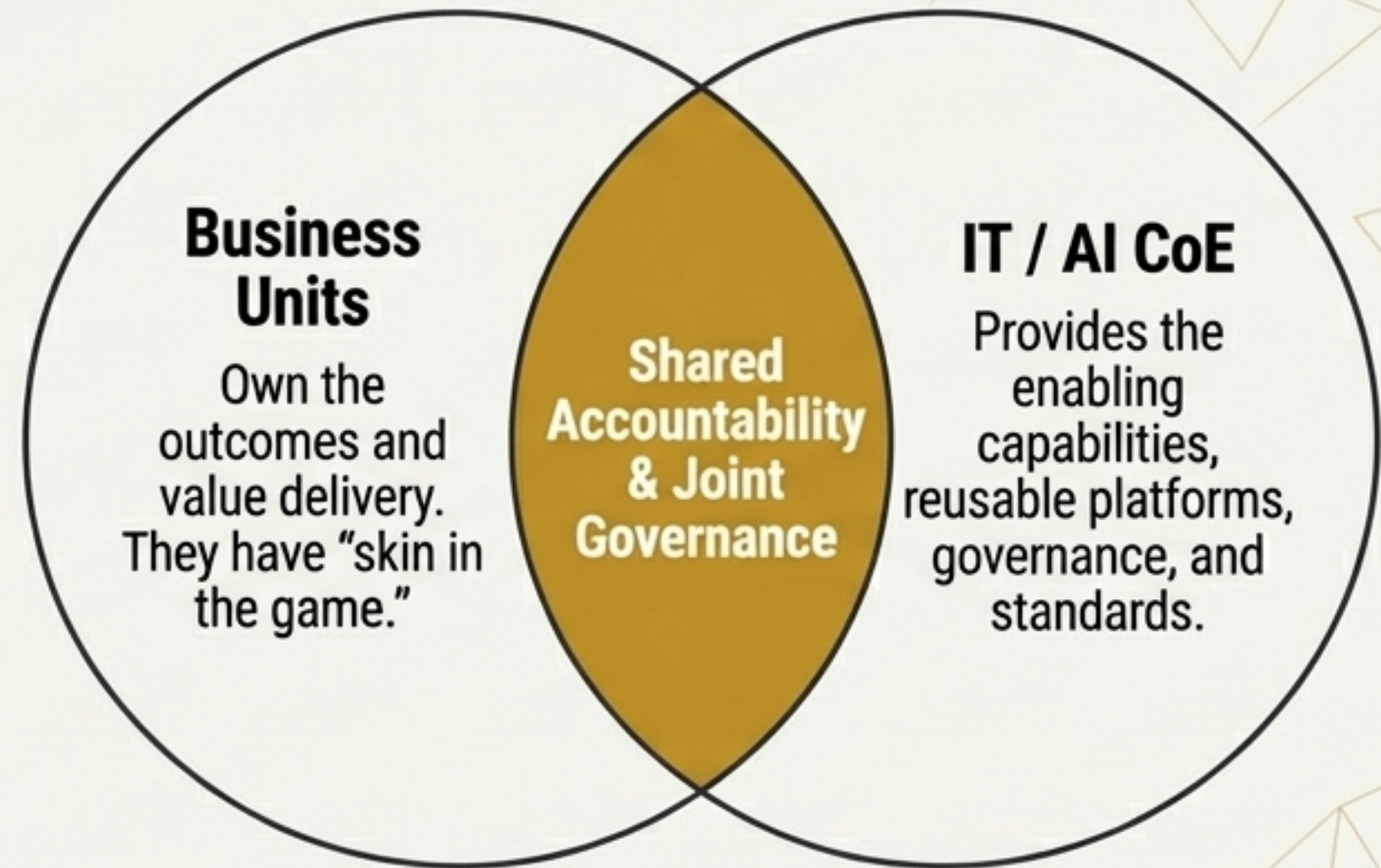
"Future-Built" companies are **1.5 times more likely** to adopt a co-ownership model.

### Critical Design Questions Leaders Ask:

1. Which employee journeys matter most?
2. Which tasks can AI handle, and which must remain human?
3. How do we ensure responsible AI principles have practical effect?

## Ecosystem Power

Leaders are **3x as likely** to leverage external partners strategically, orchestrating a multi-vendor ecosystem for infrastructure, models, and applications.







# Play 4: Systematically Develop Talent and Redesign Roles for Human-AI Collaboration

## A Tale of Two Talent Strategies

### Future-Built Firms



Plan to upskill **>50%** of their workforce in 2025.

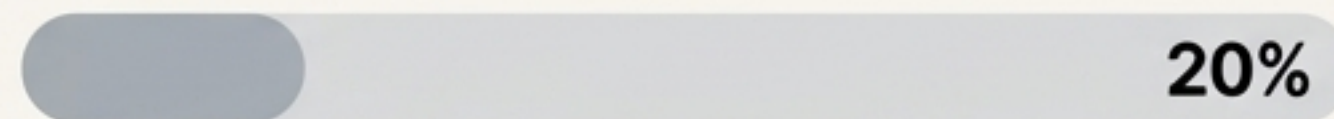
#### Method

Dedicate protected time for learning (**6x more likely**) and actively involve employees in co-designing AI solutions (**2x more often**).

#### Planning

Are **5x more likely** to engage in strategic workforce planning for AI.

### Lagging Firms



Plan to upskill only **20%** of their workforce.

#### Method

Impose AI tools from the top down with minimal training or engagement.

#### Planning

React to talent gaps as they become crises.

**The New Human Role:** As AI agents assume routine tasks, human value shifts to oversight, complex judgment, creative problem-solving, and orchestration





# Play 5: Build a Unified Technology Architecture and Data Foundation for Scale

## The Foundation for Success

### Centralized AI Platform

“Future-Built” firms are **3x more likely** to operate a central, integrated platform.

This provides common tools for security, monitoring, and orchestration that are built once and reused repeatedly.

### Unified Data Model

#### Leaders

**Over 50%**

operate on a unified enterprise data model, providing governed access to trusted data

#### Laggards

**4%**

(vs. just 4% of laggards)





## In Practice

### An Electronics Manufacturer's “Company Store”

- **The Strategy:** Assembled a centralized platform of agentic AI solutions to govern and scale use cases across 200+ factories.
- **The Power of Reuse:** Core agents for defect diagnostics and production planning are used repeatedly, accelerating deployment.
- **The Impact:** 80% automation in complex operations, projecting a **\$300 million EBIT impact**.



# The Anatomy of an AI Leader vs. a Laggard

Future-Built Profile		Laggard Profile
	CEO-sponsored strategic program	Delegated IT project
	End-to-end workflow reinvention	Incremental task automation
	Joint Business-IT ownership	Siloed functions
	>50% of workforce upskilled	20% of workforce upskilled
	Centralized, reusable platform	Fragmented, one-off tools

***Which profile more closely resembles your organization today?***

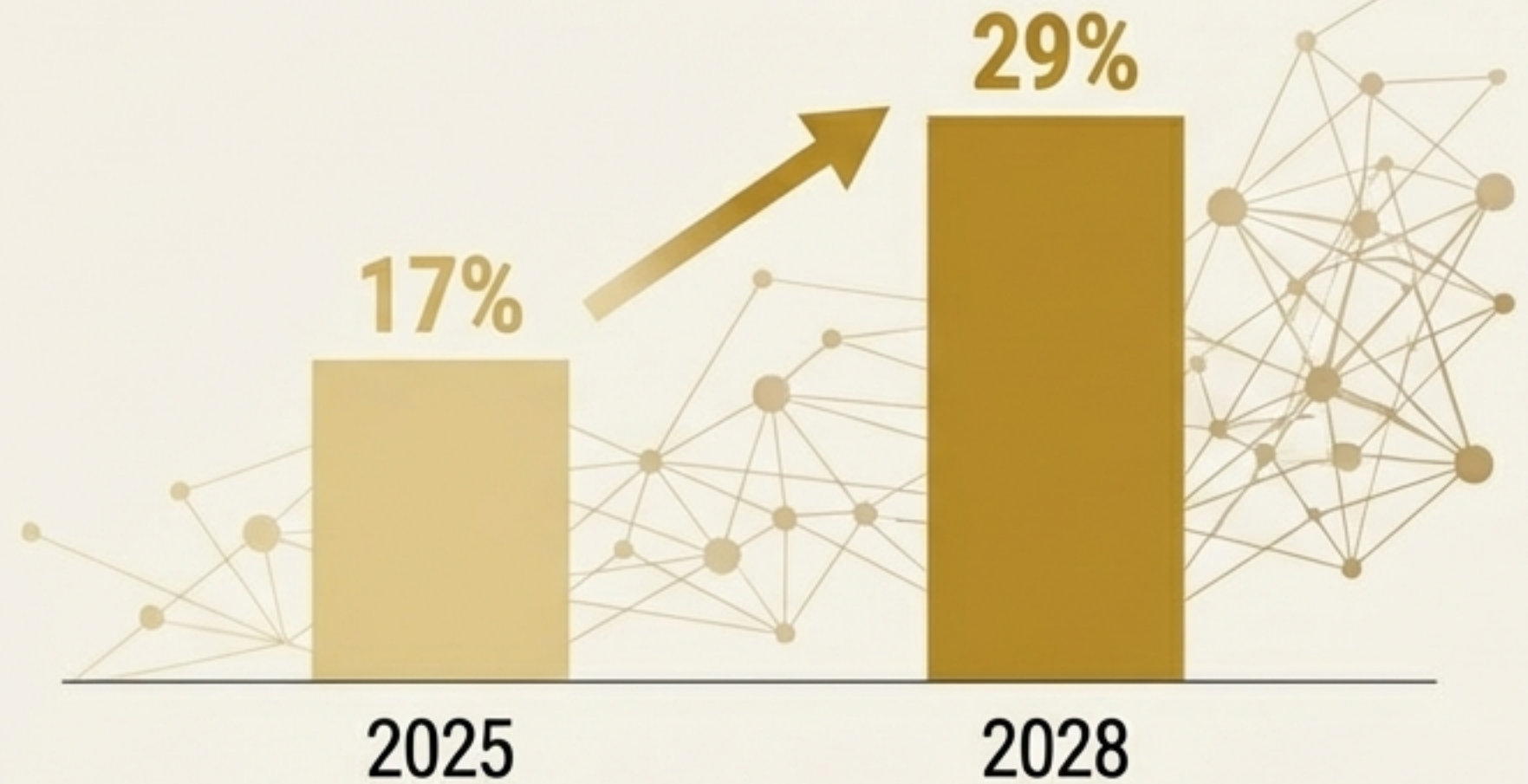


# The Next Wave Is Here: Agentic AI Will Accelerate the Divide.

## What is Agentic AI?

Autonomous digital workers that can reason, learn, and act to execute complex workflows, moving beyond simple prediction or generation.

## Contribution to Total AI Value



Organizations that master agent orchestration within redesigned workflows will fundamentally reshape competitive dynamics. Those that fail to act risk permanent competitive disadvantage.



# The AI Value Gap Is a Choice.

## The Stakes Summarized

- The performance gap between the 5% and the 60% is real, measurable (3.6x TSR), and widening.
- This is a self-reinforcing dynamic; catching up later may be impossible.
- The challenge is not access to technology, but the leadership to transform fundamentally rather than optimize marginally.

## The Final Message

**The proven playbook exists. The imperative is to move from incremental pilots to a strategic, enterprise-wide program with executive ownership and measurable targets. The evidence is clear: the organizations that will lead their industries for the next decade are making these commitments today.**