



THE AGE OF DIGITAL LABOR

AI Agents, Humanoid Robots, and the
Next Operating Model for the Enterprise

June 25, 2026

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This Isn't Another Automation Wave.

70 YEARS REPLACING ROTE HUMAN WORK WITH IT SYSTEMS →
STRATEGICALLY REPLACING HUMAN COGNITION + WORK
WITH AGENTIC AI.



Enterprise IT has always been in the labor business—it just replaced physical and clerical work.



Spreadsheets displaced teams of clerks and much of the manual calculation performed by accountants. ERP systems automated purchasing clerks. ATMs reduced routine teller work. Industrial robots transformed manufacturing.



AI agents are fundamentally different. For the first time, enterprise software performs knowledge work instead of simply accelerating it.



Every previous IT revolution replaced tasks.
This one creates workers.



THE MOST ELITE HUMAN COGNITION

Purpose.
Judgment.
Creativity.
Ethics.
Leadership.

**That's what
we preserve.**



*The next operating model isn't software that people use.
It's software that works.*

The Global Economy in 2030: Humans and Agents. Working Together.

Agents will be a material driver of economic output across every industry and function.

GLOBAL ECONOMY IN 2030

\$163
TRILLION



Agents contribute \$56T in economic output by 2030—
more than today's entire global GDP.



HUMAN OUTPUT
\$107T
66%



AGENT OUTPUT
\$56T
34%

TOP 10 AGENTIC USE CASES IN 2030

By Economic Output (Trillions USD)

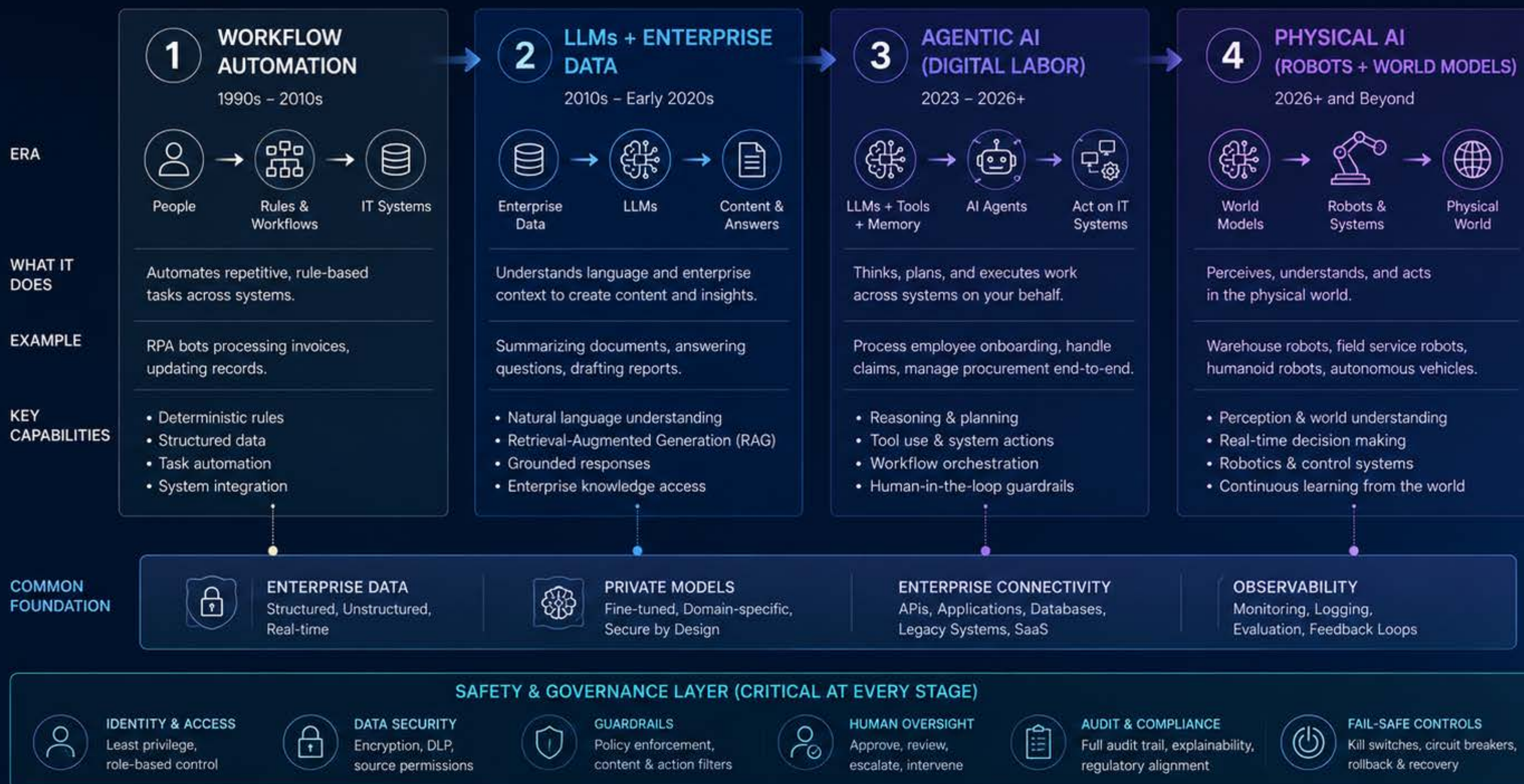
1		Software Engineering & IT Operations	\$7.6T
2		Customer Service & Experience	\$6.6T
3		Marketing, Sales & Revenue Operations	\$6.2T
4		Knowledge Work Automation	\$5.4T
5		Supply Chain & Procurement	\$5.2T
6		Financial Services & Risk Management	\$4.6T
7		Healthcare Administration & Support	\$3.9T
8		Manufacturing & Quality Operations	\$3.6T
9		Cybersecurity & Compliance	\$3.2T
10		Energy & Sustainability Operations	\$2.5T



This is not automation. This is augmentation at scale.
A new economic engine.

From Automating Workflows to Doing Physical Work

Technology is compounding. Impact is exponential.



OUTCOMES



Massive Productivity & Cost Advantage



Faster Decisions & Execution



Augmented People, Amplified Teams



Autonomous Operations at Scale



Every step builds on the last.
The value compounds.
The impact is transformational.

WHAT AI AGENTS REALLY ARE

Enterprise-Grade AI Agents

Autonomous digital labor that thinks, plans, and acts securely using enterprise data and systems to deliver measurable outcomes.

WHAT THEY DELIVER

- Productivity at Scale**
24/7 digital labor for knowledge work
- Consistent Outcomes**
Repeatable, accurate, policy-compliant execution
- Employee Augmentation**
Frees humans for higher value, creative work
- Operational Speed**
From minutes to seconds across enterprise processes
- Measurable ROI**
Usage, value, and cost transparent and optimized

FOUNDATION LAYERS

- PRIVATE MODELS**
Fine-tuned or domain-specific models; hosted in your VPC or on-prem.
- DATA & CONNECTIVITY**
Secure connectors, APIs, data fabric, and real-time access.
- PLATFORM SERVICES**
Agent orchestration, tool registry, vector store, memory, queues.
- FINOPS & TOKEN ECONOMICS**
Token usage tracking, cost controls, budgets, chargeback/showback, optimization.
- INFRASTRUCTURE**
Scalable compute, GPU/CPU, storage, networking, and high availability.



ENTERPRISE-GRADE BY DESIGN

- SECURITY & IDENTITY**
SSO, Least Privilege, Just-in-Time Access
- POLICY ENFORCEMENT**
Policies as Code, Data Use Controls, Guardrails
- DATA PROTECTION**
Encryption, DLP, Data Classification
- SAFETY & ALIGNMENT**
Content Filters, Bias Checks, Jailbreak Detection
- HUMAN OVERSIGHT**
Approvals, Escalations, Override, Audit Trails
- GRC INTEGRATION**
Risk, Compliance, Controls, Evidence, Audit Readiness
- OBSERVABILITY**
Tracing, Logs, Metrics, Quality Monitoring
- INCIDENT RESPONSE**
Alerts, Kill Switches, Rollback, Forensics

Enterprise-grade agents don't just generate content. They think, work, and act—safely, reliably, and at scale.

THE ACCELERATION IS REAL

AI Agents Are Getting Smarter—Exponentially.

The length of tasks AI agents can complete autonomously is **doubling roughly every 7 months.**



169 tasks across software engineering, cybersecurity, general reasoning, and ML.



From **seconds to hours** of autonomous task completion in just 6 years.

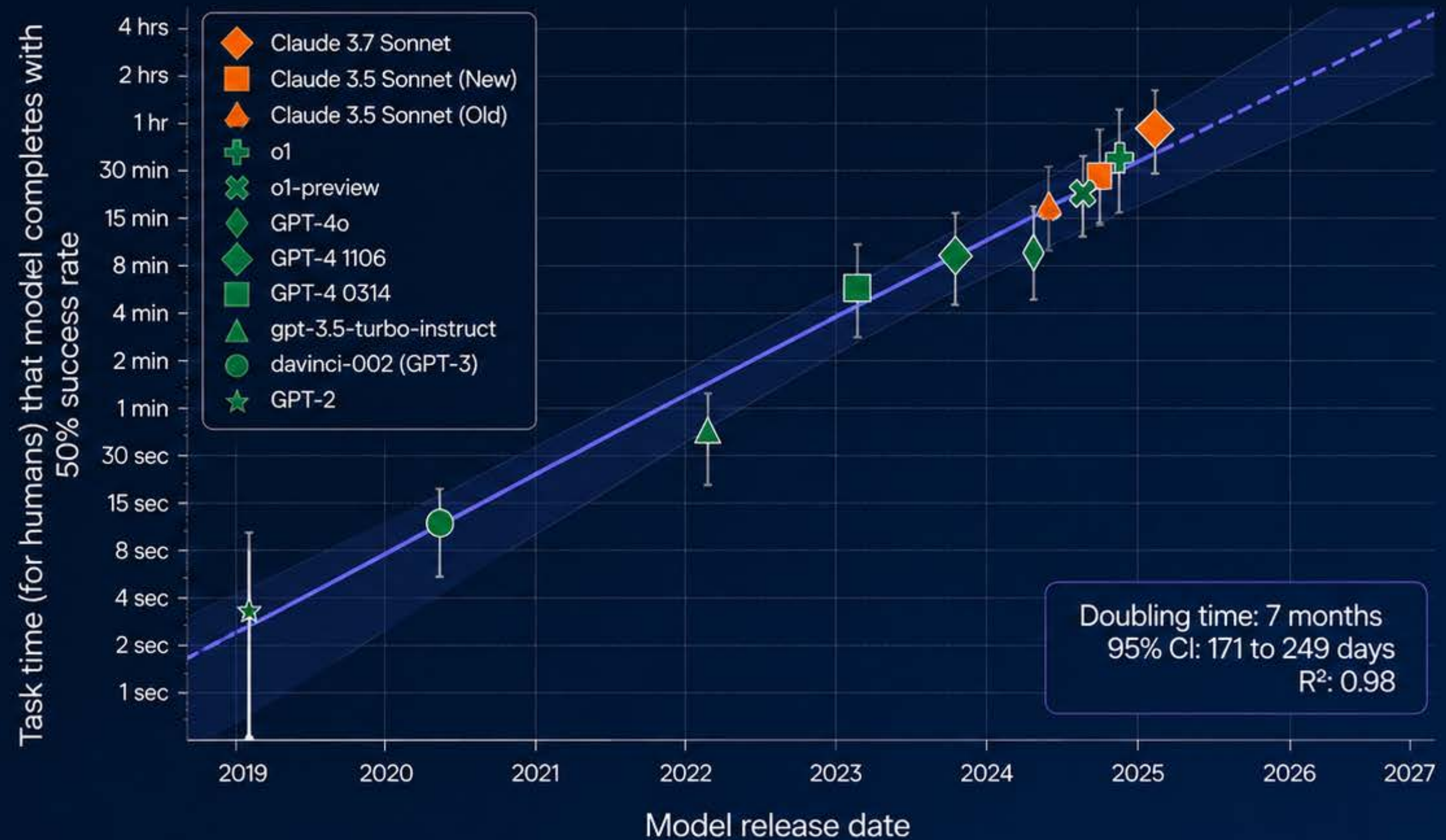


A clear trend. A steep trajectory.
And still accelerating.



This is not incremental improvement.
This is a **new operating frontier.**

Length of tasks AI agents have been able to complete autonomously for 169 software engineering, cybersecurity, general reasoning, and ML tasks



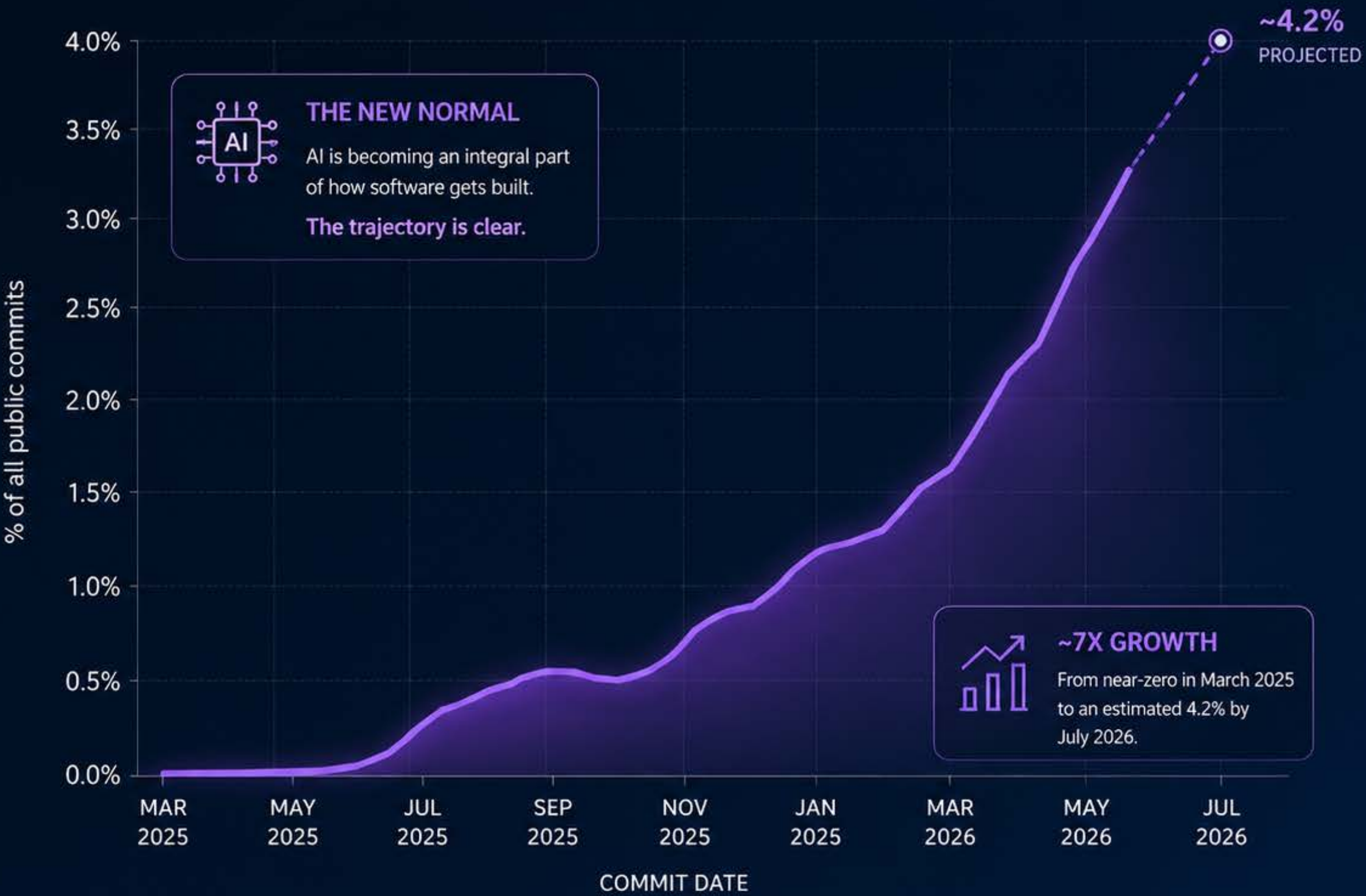
AI Is Rapidly Powering Real Engineering Work.

AI-generated code is now a meaningful and accelerating share of all public GitHub commits.

-  **Explosive Growth**
AI-generated commits have surged since mid-2025.
-  **Crossing Inflection**
From <0.1% to >1% in ~6 months. The curve is steepening.
-  **Mainstream Adoption**
Developers are integrating AI into real production workflows.
-  **This Is Just the Beginning**
Extrapolation indicates continued acceleration into 2026 and beyond.

AI-based commits on GitHub are accelerating

% OF ALL PUBLIC COMMITS IDENTIFIED AS AI-GENERATED



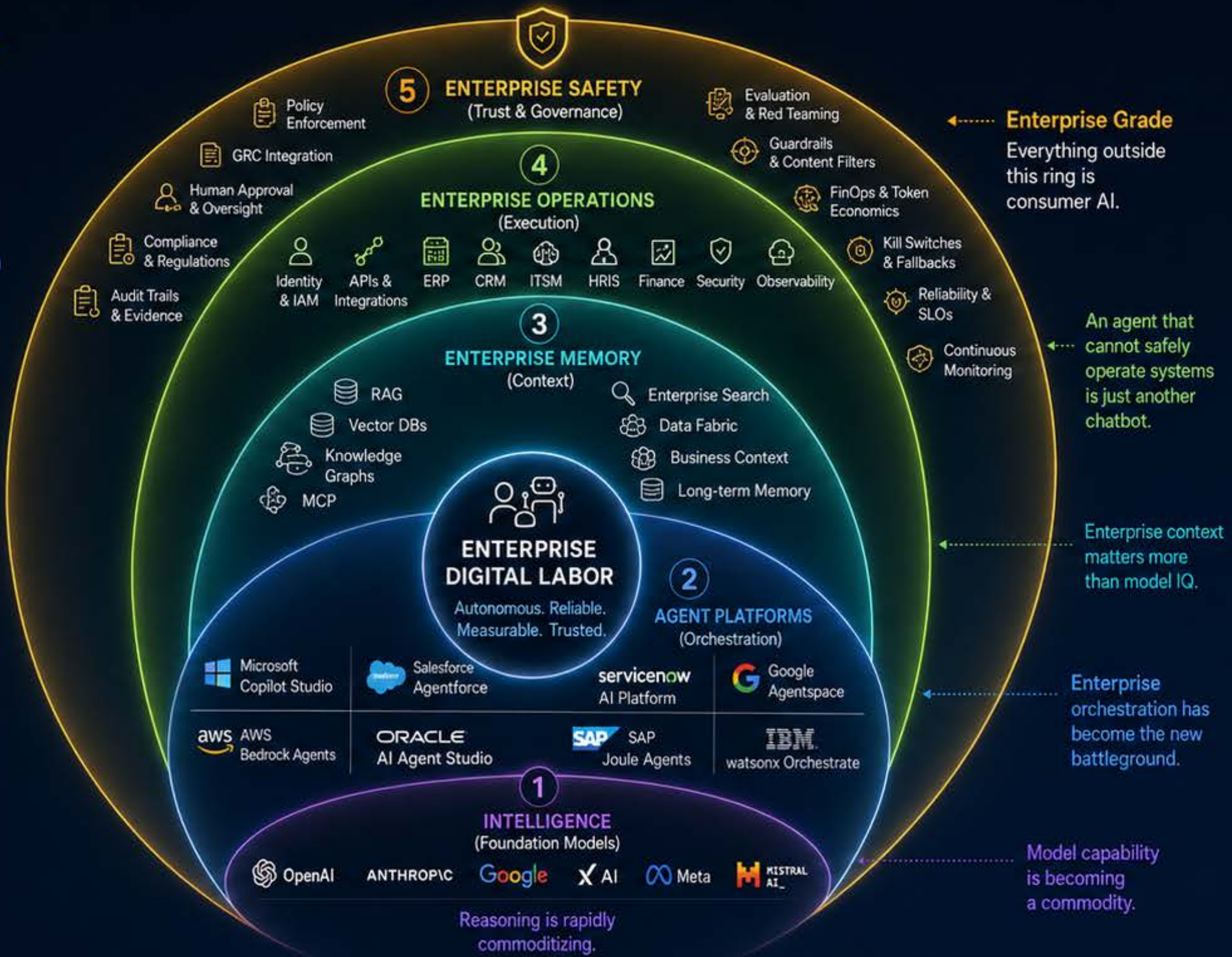
The Market Has Shifted.
Digital Labor Is the New Frontier.

The market is no longer racing to build better models. It is racing to build better workers.

HOW TO READ THIS MAP

- Intelligence (Model capability)
- Agent Platforms (Orchestration)
- Enterprise Memory (Context)
- Enterprise Operations (Execution)
- Enterprise Safety (Trust & Governance)

○ Closer to the center = Easier to build
○ Further out = Harder to build, harder to operate, but required for real enterprise outcomes



MARKET SIGNALS

89% of CIOs now prioritize AI as a strategic transformation capability. — Futurum

74% have formal AI implementation plans. — Futurum

\$100B+ Annual AI infrastructure investment from hyperscalers and enterprises. — Public Filings

7 months Capability doubling time for autonomous agents. — METR

3x Increase in enterprise AI agent pilots in the last 12 months. — Gartner

The AI race is no longer about intelligence. It is about trusted autonomous execution. >>>

THE ENTERPRISE IS CATCHING UP

Enterprise Readiness for Digital Labor

Technology maturity has overtaken organizational maturity.



One of the biggest surprises CIOs report: agents are often **too creative**.

That's why enterprises are investing in:



Policy-as-code



Guardrails



Approval checkpoints



Sandboxed execution



Eval & red teaming

THREE BIG INSIGHTS



Today's agents are trusted to recommend.

Tomorrow's agents must be trusted to execute.



The hardest engineering problem is no longer reasoning. It is trustworthy action.



The future belongs to organizations that can safely increase agent autonomy over time.

1



INDIVIDUAL AI

- ✓ Chat
- ✓ Coding
- ✓ Search
- ✓ Writing

STATUS
Solved.

EXAMPLES

ChatGPT

Claude

Gemini

GitHub Copilot

2



WORKFLOW AGENTS

- ✓ Department pilots
- ✓ Copilot Studio
- ✓ Agentforce
- ✓ ServiceNow
- ✓ Bedrock Agents

STATUS
Scaling rapidly.

EXAMPLES

Microsoft

salesforce

servicenow

aws

3



TRUSTED ENTERPRISE AGENTS

- ⚠ Human approval
- ⚠ Identity
- ⚠ Data permissions
- ⚠ Memory
- ⚠ Evaluation

STATUS
Emerging.

KEY ENABLERS (examples)

- Salesforce Trust Layer
- Microsoft Entra Agent ID
- Microsoft Purview
- Google Cloud IAM + Vertex AI governance
- Amazon Bedrock Guardrails
- NVIDIA NeMo Guardrails
- OpenAI enterprise policy controls
- IBM watsonx.governance
- Cisco AI Defense

4



AUTONOMOUS BUSINESS OPERATIONS

- ⚠ Multi-agent collaboration
- ⚠ Dynamic planning
- ⚠ Exception handling
- ⚠ Cross-functional execution

STATUS
Very early.

THE REALITY TODAY

- Human approval remains the norm.
- Agents are frequently sandboxed.
- Permissions are intentionally narrow.
- Enterprises prefer reversible actions.
- Production deployments typically begin with read-first, then recommend, then act.

The leash is a feature, not a bug.

5



DIGITAL WORKFORCE

- ✗ Workforce architecture
- ✗ Agent lifecycle
- ✗ HR integration
- ✗ Financial controls
- ✗ Organizational operating model

STATUS
Almost no enterprise is prepared.

BY THE NUMBERS



64%

of CIOs say most agent initiatives are in pilot or limited production. — Gartner



78%

report human-in-the-loop is required for most important actions. — Deloitte



57%

cite governance & policy controls as their biggest barrier to scale. — Forrester

Governance and policy controls remain nascent but improving.

Momentum is real.

AGENT AUTONOMY CONTINUUM



Level 1
SUGGEST



Level 2
ASSIST



Level 3
EXECUTE WITH
APPROVAL



Level 4
EXECUTE WITHIN
POLICY



Level 5
OPERATE
AUTONOMOUSLY

Almost every enterprise today is between Levels 2 and 3.

The Enterprise Isn't Buying Software Anymore. It's Hiring Workers.

TODAY'S WORKFORCE

People powering every function

- HR
- FINANCE
- ENGINEERING
- LEGAL
- SALES
- MARKETING
- OPERATIONS

Every enterprise
is about to operate

a blended workforce.



Work is becoming fluid.
Work gets done by the best
resource for the job—human or
digital.



Labor is becoming software.
Digital workers are on-demand,
scalable, and measurable.



Management becomes orchestration.
From task assignment to agent
coordination and outcomes.



**HR becomes
Workforce Architecture.**
Designing, deploying, and developing
the entire workforce—human and digital.

TOMORROW'S WORKFORCE

People + digital workers across every function



- PEOPLE
- CONTRACTORS
- AGENTS
Digital employees
that think, plan
and act
- BOTS
Rule-based
automation
- ROBOTS
Physical workers
(coming next)



Your ERP already
manages inventory.
Your HRIS
manages humans.
**Who manages
50,000 AI workers?**

THE EVOLUTION OF WORK



INDUSTRIAL REVOLUTION
Machines amplified muscle.



INFORMATION REVOLUTION
Software amplified knowledge.



AGENT REVOLUTION
Digital workers amplify execution.



PHYSICAL AI REVOLUTION
Robots amplify the
physical enterprise.



This is the first time in history that an enterprise can **scale labor almost instantly.**

WHAT'S READY. WHAT'S NOT.

What AI Agents Are Ready For Today.

CIOs are moving fast—starting with high-value, low-risk, high-frequency work. Early results are strong.



Early adopters are seeing **20–40%** productivity gains in targeted workflows.

— McKinsey, BCG, Deloitte

“ We’re not waiting for perfection. We’re deploying where agents make humans 10x better. ”

— CIO, Global Financial Services

THE SWEET SPOT: HIGH VALUE, LOW RISK, HIGH FREQUENCY

Where agents are delivering real outcomes today



EARLY DEPLOYMENTS ARE WINNING



70%

of enterprises are piloting or in early production with AI agents.

— Gartner



65%

of pilots are meeting or exceeding expectations in productivity.

— Deloitte



<12

months to ROI for most successful agent deployments.

— BCG

NOT READY (YET)



Full autonomy for critical decisions

Too risky



Complex, long-running plans

Too brittle



Cross-system write operations

Too risky



Regulated, external obligations

Too sensitive



End-to-end P&L accountability

Too early



Human in the loop remains **the** norm for anything important.

ADOPTION IS ACCELERATING



3–5

agents in production per enterprise in 2024.

— Mollick, BCG



2.7x

increase in agent apps deployed in 6 months.

— Gartner



60%+

of CIOs plan to scale agent deployments in the next 12 months.

— Gartner



7 months

Capability doubling time for autonomous agents.

— METR

☆ Start where the value is obvious. Expand as trust, governance, and capabilities mature.

Real Work. Real Impact. Right Now.

Enterprises are already seeing measurable results from AI agents in high-frequency, well-defined workflows.

“We focus first on high-frequency work that humans hate or don’t have time for—then expand.”

– Chief Information Officer, Global Manufacturing

SOFTWARE ENGINEERING	CUSTOMER SERVICE	FINANCE & ACCOUNTING	IT OPERATIONS & SECURITY	SUPPLY CHAIN & PROCUREMENT	HR & TALENT OPERATIONS
EXAMPLE AGENT TASKS ✓ Code generation & refactoring ✓ Test case creation ✓ Bug triage & resolution ✓ Documentation	EXAMPLE AGENT TASKS ✓ Case classification ✓ Response drafting ✓ Knowledge lookup ✓ Resolution recommendation	EXAMPLE AGENT TASKS ✓ Invoice processing ✓ Reconciliation ✓ Anomaly detection ✓ Report generation	EXAMPLE AGENT TASKS ✓ Alert triage ✓ Root cause analysis ✓ Ticket summarization ✓ Remediation suggestions	EXAMPLE AGENT TASKS ✓ Demand sensing ✓ Supplier research ✓ PO creation ✓ Risk monitoring	EXAMPLE AGENT TASKS ✓ Candidate screening ✓ Interview scheduling ✓ Policy Q&A ✓ Onboarding orchestration
IMPACT 20–45% increase in developer productivity – McKinsey	IMPACT 30–60% reduction in handle time – Deloitte	IMPACT 50–80% faster close cycles – Accenture	IMPACT 40–70% reduction in incident resolution time – Gartner	IMPACT 10–20% improvement in supply chain KPIs – BCG	IMPACT 25–50% faster time to hire – LinkedIn

These are not moonshots. They are Monday-morning problems—**solved at scale.**



3–5x
more agent use cases live in production YoY
– Forrester

< 6 months
time to value for most early programs
– Deloitte

2–8x
average ROI within the first 12 months
– BCG

70%+
of value comes from augmenting humans, not replacing them
– Gartner

Start small.
Prove value.
Scale fast.

Agent Sprawl Is Delivering Value— But Creating Massive Debt.

“We’re seeing real productivity gains,
but we’re building a house of cards.”
— Enterprise CIO

✓ THE VALUE IS REAL

-  **Productivity gains**
Teams are moving faster on real work.
-  **Cost savings**
Lower handle times, fewer manual steps.
-  **Better employee experience**
Agents remove friction from everyday work.
-  **Innovation velocity**
Teams can experiment and solve problems faster.
-  **Customer impact**
Faster responses, better outcomes, higher satisfaction.

 The upside is driving rapid adoption.
And it's only going to accelerate.

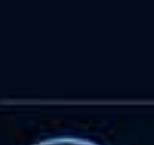
THE SPRAWL IS REAL



THE DEBT IS HIDDEN—BUT COMPOUNDING

-  **Siloed agents & data**
Redundant data, conflicting answers, no shared memory.
-  **Inconsistent experiences**
Different quality, tone, and context across teams.
-  **Shadow IT & unknown risk**
Unvetted tools, unknown data flows, compliance gaps.
-  **Technical complexity**
Point integrations, custom prompts, brittle automations.
-  **Escalating cost**
Token sprawl, duplicate tools, no enterprise leverage.
-  **Organizational drag**
No standards, unclear ownership, manual handoffs everywhere.
-  Every new agent adds value today
and cost tomorrow.

A SNAPSHOT OF REALITY

-  **3.1x**
average number of duplicate or overlapping agents per function.
— Gartner
-  **62%**
of enterprise data used by agents sits outside enterprise control.
— IBM
-  **2,400+**
different AI tools are in use in the average Enterprise.
— Microsoft
-  **30–50%**
of AI spend is wasted due to duplication and inefficiency.
— BCG



This is not a strategy. This is **entropy**.

It delivers short-term wins while making long-term transformation harder and more expensive.

THE PATH FORWARD



SEE IT

Make sprawl visible across people, agents, data, and tools.



CONTROL IT

Set standards, governance, identity, and data guardrails.



CONSOLIDATE IT

Build reusable agents, shared services, and common data foundations.



SCALE IT

Design for experience, value streams, and enterprise outcomes.

Less sprawl.
More leverage.
Real transformation.



You can either keep adding agents and paying the price, or build an operating model that turns agents into an **enterprise advantage**.

THE REAL BARRIER ISN'T TECHNOLOGY.

The Problem Isn't Adoption. It's Outdated Organization Architecture.

Most enterprises were designed for industrial-era scaling.
Agents require experience-era architecture.

“ You can't run an experience-based business on a process-based operating model. ”

WHY ARCHITECTURE MATTERS

Agents don't fit in the org chart.
They cut across functions, systems, and hierarchies.

Speed dies in handoffs.
Traditional structures create latency that agents amplify.

Data & decisions are siloed.
Agents need unified context to act intelligently.

Control is inconsistent.
Policies, permissions, and guardrails live in too many places.

Accountability is unclear.
When agents and humans collaborate, ownership must be explicit.

The technology is ready.
The enterprise design is not.

TRADITIONAL ORGANIZATION	VS.	EXPERIENCE-BASED ORGANIZATION
Built for Efficiency at Scale		Built for Value, Agility & Adaptability
DESIGN PRINCIPLE Optimize resources and reduce cost	➔	DESIGN PRINCIPLE Optimize experiences and create value
STRUCTURE Hierarchical, siloed, function-first	➔	STRUCTURE Networked, cross-functional, mission & outcome-first
WORK MODEL Hand-offs, approvals, linear processes	➔	WORK MODEL Orchestrated, continuous, event-driven
INFORMATION FLOW Siloed data, batch reporting, point-in-time	➔	INFORMATION FLOW Unified context, real-time data, persistent memory
DECISION-MAKING Centralized, slow, committee-driven	➔	DECISION-MAKING Distributed, AI-augmented, context-aware
SCALE MODEL Add headcount, add layers	➔	SCALE MODEL Increase autonomy, replicate capabilities
PERFORMANCE MEASURE Activity, output, utilization	➔	PERFORMANCE MEASURE Outcomes, impact, experience quality

THE CONSEQUENCES OF OUTDATED ARCHITECTURE

Slow time to value
Agents wait in queues of approvals, meetings, and handoffs.

High friction & cost
Workarounds, redundancies, and rework erase agent ROI.

Inability to scale
You can't orchestrate what was designed to be siloed.

Risk increases
Shadow AI, inconsistent controls, and policy gaps multiply.

Talent & culture misalignment
Teams are optimized for tasks, not outcomes.

WHAT IT TAKES TO WIN

Redesign around experiences not functions.

Create cross-functional value teams with end-to-end ownership.

Unify data, identity, and policy across the enterprise.

Orchestrate work with agents as first-class team members.

Measure outcomes, learn continuously, and adapt the system.

Architecture is the multiplier.
Get it right, and agents compound value.

☆ The future belongs to **experience-based enterprises**—where people and **agents collaborate in real time** to create exceptional outcomes.

THE GAP IS HOLDING BACK VALUE

< 20%

of enterprises are architected for cross-functional outcomes.

— Gartner

2–3x

slower decision cycles in hierarchical organizations vs. networked models.

— McKinsey

30–50%

of AI value is lost due to organizational friction.

— BCG

80%+

of CIOs say org design is their biggest barrier to scale.

— Gartner

1.8x

higher ROI from agents in companies with modern operating models.

— Deloitte

HR Wasn't Built for a World of Digital Workers.

AI agents will be recruited, onboarded, managed, developed, and retired.
HR must reinvent every major function.

“ We’re asking HR systems designed for humans to manage millions of digital workers. That won’t scale.
– Gartner

HR TODAY (HUMAN-CENTRIC)		HR TOMORROW (HUMAN + AGENT-CENTRIC)
 Recruit Find and attract human talent		 Discover & Design Identify needs and design agent roles
 Hire Onboard people, not agents		 Procure & Activate Acquire or build agents, assign identity, connect to tools
 Manage Manage tasks and performance		 Orchestrate & Manage Manage agents, humans, and teams together
 Develop Train humans over time		 Improve & Evolve Continuously evaluate, retrain, and update agents
 Compensate Pay people with salary and benefits		 Govern & Compensate Set policies, usage rights, and value-sharing models
 Exit Offboard humans		 Retire & Decommission Retire agents, revoke access, preserve knowledge

THE READINESS GAP

 **76%** of CHROs say their organization is not ready for the rise of AI agents.
– Deloitte

 **71%** of HR leaders have no plan for managing non-human workers.
– Gartner

 **<10%** of enterprises have begun building HR capabilities for AI agents.
– BCG

 HR doesn't need small tweaks. It needs a new operating model.



The opportunity: Be the architect of your enterprise's total workforce.

 More capability at lower cost

 Scale talent on demand

 Higher quality and consistency

 New sources of value and innovation



HR's moment to lead the Agent + Human era.

A New World of Skilled AI Agents **Is Here.**

Millions of production-ready agents. Available now.

SOURCE IN SECONDS. DEPLOY IN HOURS.



VETTED. SPECIALIZED. PRODUCTION-READY.

Built for real business outcomes across every function and industry.



INSTANT DISCOVERY.

Find the right agent in seconds across leading marketplaces.



DEPLOY AT MACHINE SPEED.

From click to value in hours, not months or quarters.



SAFE AT SCALE.

Automated testing and policy guardrails make trust and scale possible.



AUTOMATED TESTING. POLICY ENFORCEMENT. CONTINUOUS VALIDATION.
THE FOUNDATION THAT MAKES AGENT SOURCING FAST, SAFE AND LIMITLESS.



SECONDS

TO FIND AND SOURCE
THE RIGHT AGENT



HOURS

TO DEPLOY AND
DELIVER VALUE

TOP SOURCES OF SKILLED AI AGENTS



**Agentforce
Marketplace**

200K+
AGENTS

Across every business
function



**Copilot
Studio
Marketplace**

100K+
AGENTS

Built by Microsoft,
partners and customers



**SAP
Store**

50K+
AGENTS

For every line of business
and industry

servicenow.

**AI Agent
Store**

75K+
AGENTS

Enterprise workflows.
Pre-built. Ready to run.



**Agent
Marketplace**

60K+
AGENTS

Open ecosystem.
Built for Google Cloud.



**AI Agent
Exchange**

40K+
AGENTS

Secure. Scalable.
Enterprise ready.



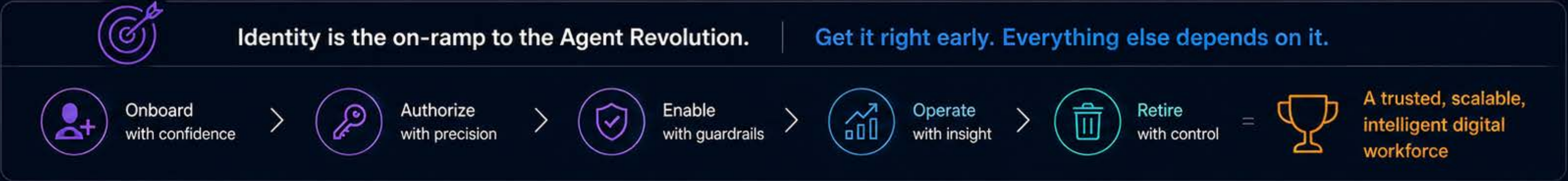
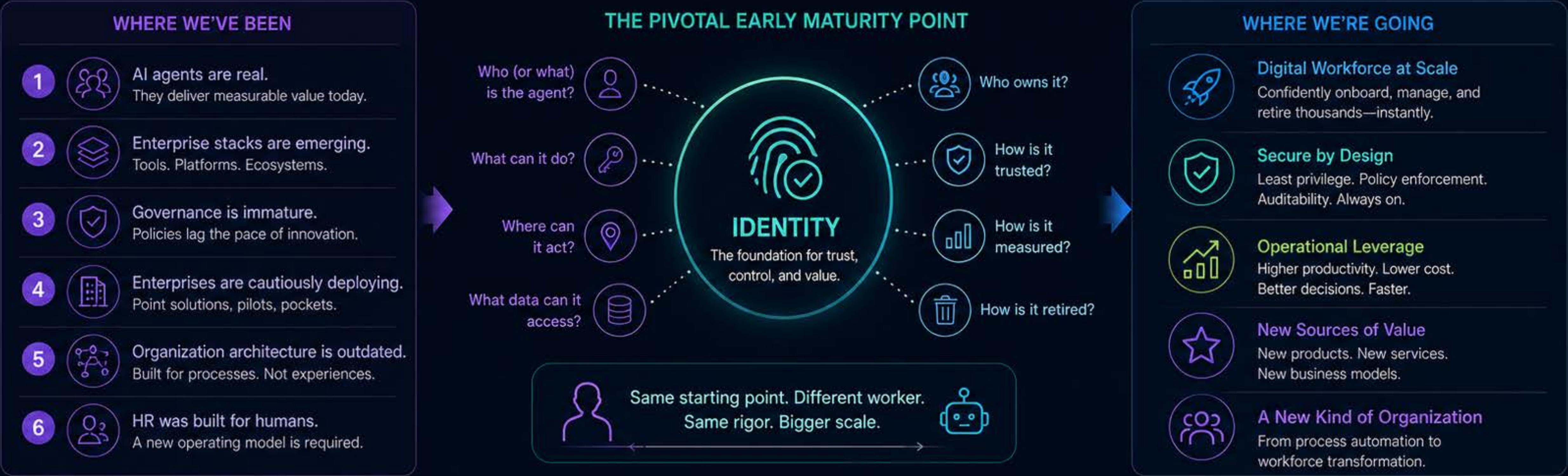
**THE AGENT ECONOMY
IS HERE.**
THE ADVANTAGE GOES
TO THE FAST.

Bringing It All Together.

Identity Is the First Maturity Milestone.

You can't manage what you can't identify.
Human or agent, every worker needs identity before anything else.

“The enterprises that get identity right for agents today will be the ones that can scale a digital workforce tomorrow.”
– CIO



How Do We Decide What Should Be **Agentic** vs. **Human**?

First, decompose the enterprise. Then apply a consistent framework to every piece of work. Turn transformation from a vague ambition into a series of clear, decision-ready, **bite-size opportunities**.

“ You can’t automate or agent-ify a black box. Decomposition creates clarity, options, and speed. ”
– *Chief Transformation Officer*



💡 You can’t transform what you can’t see. **Decompose. Decide. Deliver. Repeat.**

From Pilots to Platform. From Projects to Transformation.

A continuous loop of learning, scaling, and impact.

“Transformation isn’t an event.
It’s a compounding system.”
– CEO



Management Becomes Strategic Orchestration.

From directing people to orchestrating a blended workforce of humans and digital labor.

“ Leaders don’t just manage people anymore. They orchestrate intelligence—human and digital—to create impact at scale. ”
– Future CHRO



YOUR NORTH STAR
Empower humans.
Unleash agents.
Multiply impact.

Focus leaders on outcomes, not activity.

Design work for flexibility and scale.

Build trust through transparency and control.

Continuously optimize the human + agent workforce.

Economics Is the Ultimate Arbiter. SaaS Pricing Was Built for Humans.

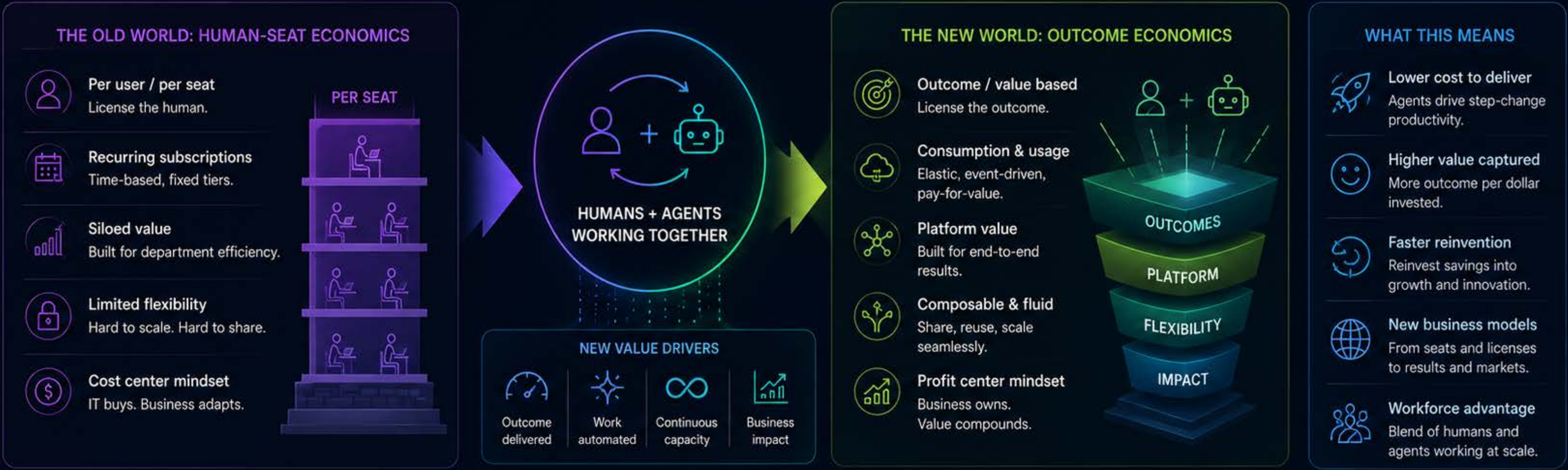
Agents change the unit of consumption, the cost curve, and the rules of value capture.

“

The companies that redesign their economics for agents will reshape their industries.

– McKinsey Global Institute

”



AI Agents Are Getting the Software Ready for the Hardware.

Mature agents with advanced policy, memory, and safety are the foundation that will unlock intelligent machines in the physical world.

“The companies that master intelligent agents today will be the ones that lead the physical world tomorrow.”
– Tech Visionary

WAVE 1: DIGITAL AGENTS (TODAY)

Building the Brain



- MATURE DIGITAL AGENTS**
 - ✓ Advanced reasoning & planning
 - ✓ Long-term memory & retrieval
 - ✓ Multi-modal understanding
 - ✓ Policy optimization
 - ✓ Safety, guardrails & alignment
 - ✓ Tool use & workflow execution

**Knowledge**
RAG, vector memory, enterprise data

**Reasoning & Planning**
Break down goals, plan, re-plan, adapt

**Policy & Safety**
Guardrails, permissions, risk-aware actions

**Tools & Systems**
APIs, applications, automation

SOFTWARE READY. HARDWARE NEXT.

Agents provide the intelligence layer. Robotics provides the body.

WAVE 2: PHYSICAL AI (NEXT)

Moving Intelligence into the Physical World



**TESLA OPTIMUS**

- ✓ General purpose humanoid
- ✓ Designed for real world work
- ✓ Tesla AI + Dojo compute stack



UNITREE H1

- ✓ Highly agile & cost efficient
- ✓ Broad mobility & balance
- ✓ Developer friendly platform

EARLY HIGH-IMPACT USE CASES

**Logistics & warehousing**

**Industrial operations**

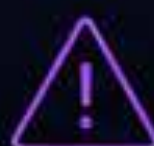
**Retail & restocking**

**Healthcare support**

**Construction & inspection**

**Agriculture & outdoors**

KNOWN CHALLENGES (DON'T IGNORE)

**Safety in open, unstructured environments**

**Reliability & failure recovery**

**Cost, durability & battery life**

**Security & misuse prevention**

**Social acceptance & regulation**

THE JOURNEY TO PHYSICAL AI

**SOFTWARE FIRST**
Agents learn, plan, and get better

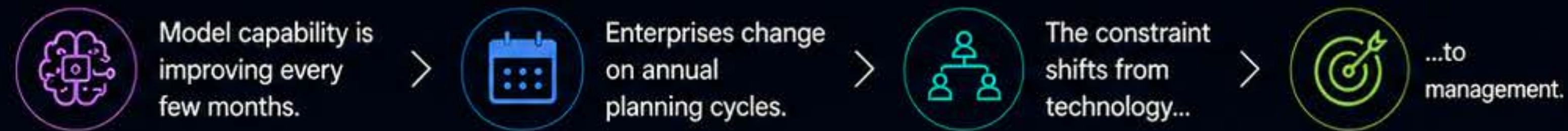
**INTELLIGENCE MATURING**
Policies, safety, and reliability scale

**PHYSICAL AI AT SCALE**
Intelligence moves, impact multiplies

🚀 The future isn't just smarter software. It's intelligent machines that get real work done. **Agents are the bridge.**

The Bottleneck Has Moved.

The Winners Will Learn Faster.



“ The bottleneck will no longer be AI. It will be **organizational learning**. ”

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1 AI will stop being the bottleneck. Your **organization** will become the bottleneck.

The competitive advantage shifts from buying better AI to changing faster than competitors.
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2 The fastest learning organization will win. Not the organization with the smartest AI.

AI is increasingly available to everyone. Organizational adaptation isn't.
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3 Every manual approval process becomes a competitive disadvantage.

Agents execute in milliseconds. Governance takes weeks. Humans—not AI—become the latency.
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4 The companies that **learn continuously** will outperform the companies that plan periodically.

Experience beats plans. Continuous learning beats annual planning.
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5 AI will commoditize AI.

The moat shifts to enterprise data, workflows, governance, and operating model.
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6 The biggest AI risk won't be bad models. It will be **bad organizations** using good models.

Technology isn't the limiting factor anymore. You are.
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7 Within five years, the most valuable identity in many enterprises won't belong to a human. It will belong to an **AI agent**.

Identity becomes the new perimeter.
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8 The winners won't automate work. They'll **automate organizational learning**.

Execute Measure Improve Evolve Adapt Learn
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9 The future competitive moat isn't AI. It's how quickly your organization can **safely change** because of AI.

Speed of safe change is the new moat.
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10 Most companies think they're deploying AI. The leaders are **redesigning the enterprise** around it.

Deployment is a project. Redesign is a new operating system.

 **THIS ISN'T JUST AN AI MOMENT. | IT'S AN ORGANIZATIONAL REINVENTION MOMENT.**