The State of AI: From Pilots to Autonomous Production

Strategies for scaling agentic AI, driving enterprise value, and governing responsibly.

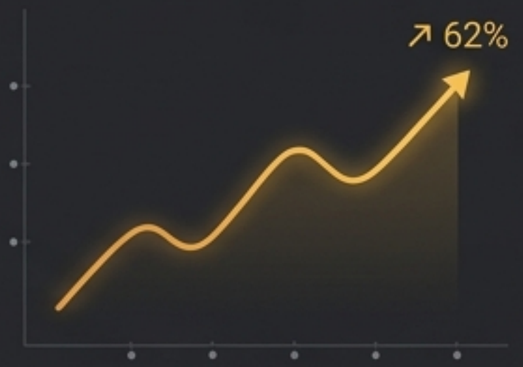
Executive Summary

The Gap

88% enterprise adoption, but only ~33% scaling for impact.

The Frontier

62% of organizations are actively experimenting with Agentic AI.



The Differentiator

High-performing organizations fundamentally redesign workflows, not just bolt-on tools.

The Mandate

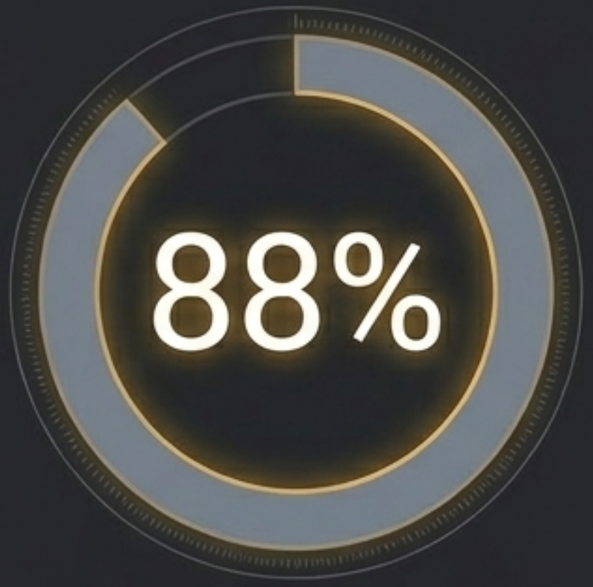
Observability and governance are the new scaling bottlenecks.

Part I: The AI Reality Check

Unpacking the gap between widespread experimentation and scaled enterprise value.

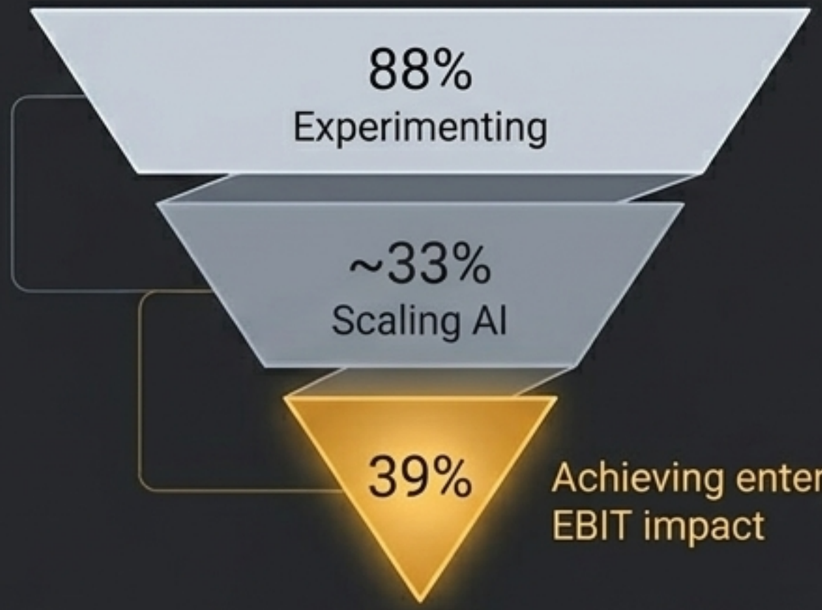
The AI Reality Check

The Illusion of Scale



Organizations regularly using AI

The Reality of Value



The shift from pilot to production is the primary hurdle of 2025. Nearly two-thirds of organizations remain stuck in the experimentation phase without material bottom-line returns.

Where the Value Lives

Efficiency plays dominate IT and engineering, but the organizations capturing **top-line growth** are deploying AI deep into **customer-facing** and **product strategy** domains.

Part II: The Agentic Shift

Moving from information retrieval to autonomous, multi-step execution.

Beyond Chat: The Rise of Agentic AI

Information Capture (Past)
Basic search and retrieval.

Generative Output (Present)
Content creation, coding assistance, summaries.

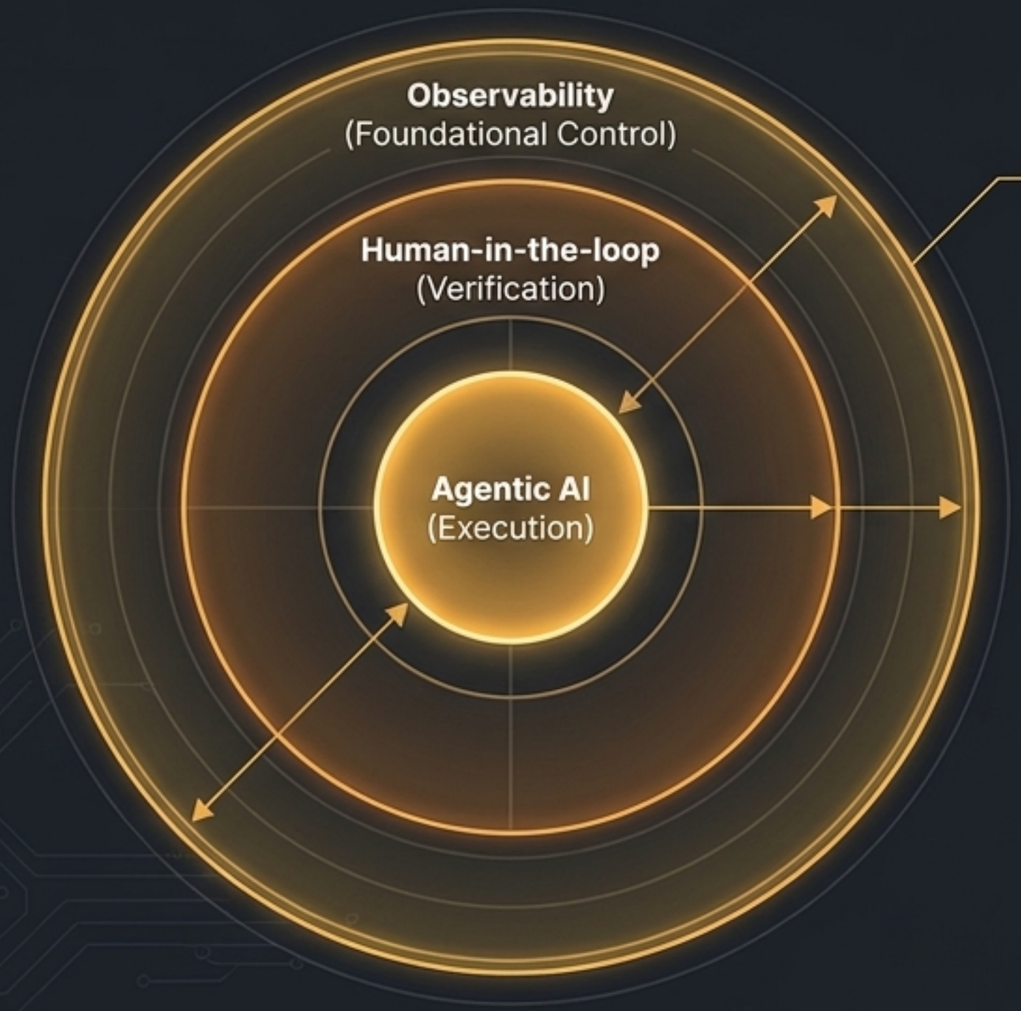
Autonomous Action (The Frontier)
Planning and executing multi-step workflows.

62%
of organizations experimenting with AI agents.

23%
have mature, enterprise-wide integration.

72%
utilize agents for IT and DevOps, but customer-facing apps are the fastest growing.

The Trust Barrier in Autonomous Operations



69%

of agentic AI decisions are currently human-verified.

Human oversight is not a temporary training phase—it is a permanent partnership. Shifting **observability from a reactive** support function to a **proactive**, foundational control **layer** is the only way to scale trust in autonomous operations.

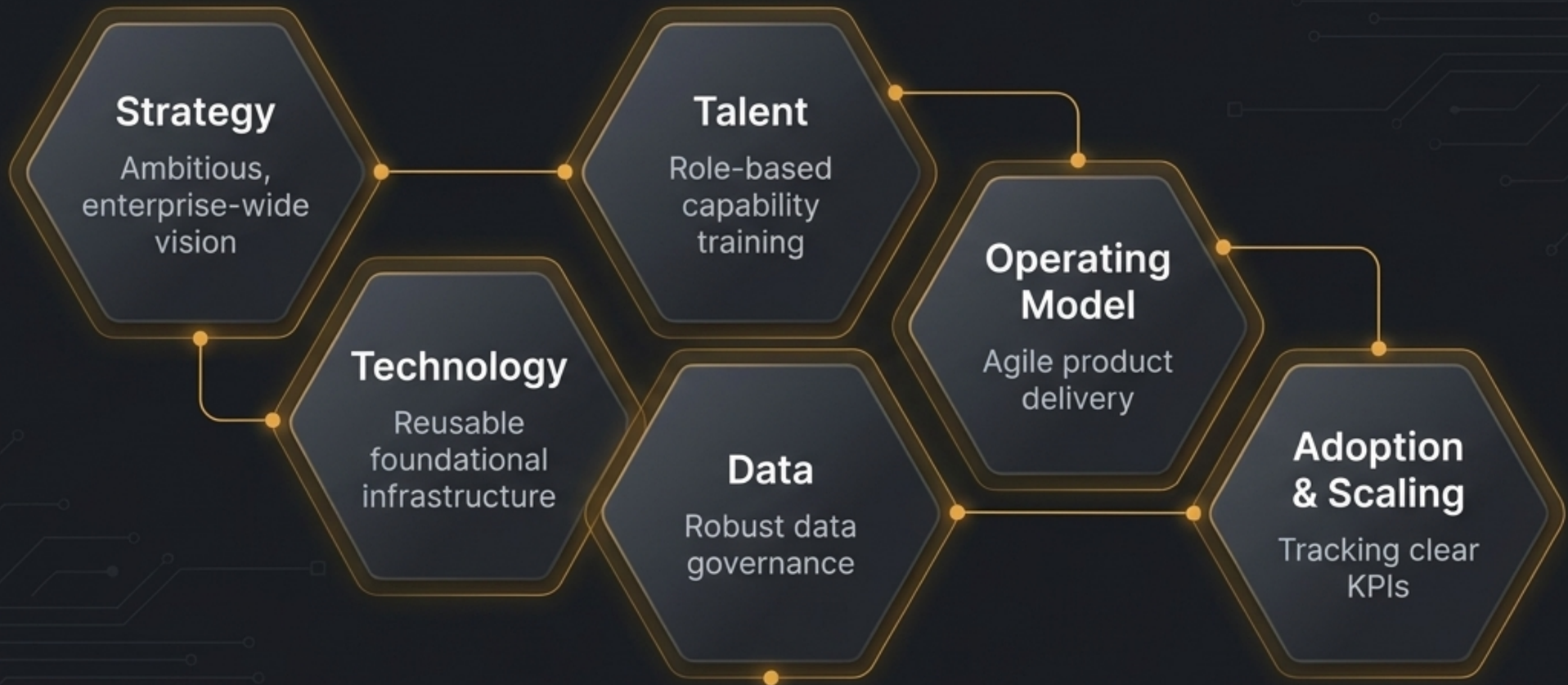
Part III: The High-Performer Blueprint

Deconstructing the playbook of organizations achieving 5%+ EBIT impact from AI.

Comparison Matrix: High Performers vs. The Rest

	Average Organizations	AI High Performers
Primary Objective	Incremental cost-cutting and efficiency.	**Transformative growth**, innovation, and top-line revenue.
Execution Strategy	Bolting new AI tools onto existing legacy processes.	**Fundamentally redesigning workflows** around AI capabilities (3x more likely).
Governance & Leadership	Delegated to IT or digital departments.	Active **C-Suite/CEO and Board-level oversight** and commitment.

The 6 Dimensions of Scaled Value



Tracking **well-defined KPIs** for AI solutions and establishing clearly defined **scaling roadmaps** are the highest-impact management practices for enterprise value.

Part IV: Governance & Responsible AI

Moving from risk avoidance to investing with confidence.

The New Zealand Approach to AI Strategy

Insight

The MBIE framework positions AI not as a risk to be avoided, but as a **technological imperative**.

Proper governance is the mechanism that allows organizations to invest with confidence.

The Responsible AI Tech Stack

As organizations scale agentic systems, mitigating these three primary risks requires shifting from localized IT policies to centralized Centers of Excellence.

Part V: The Human Factor

Reskilling, reallocation, and the shifting dynamics of the AI workforce.

The Shifting Workforce Dynamics

Decreasing Demand

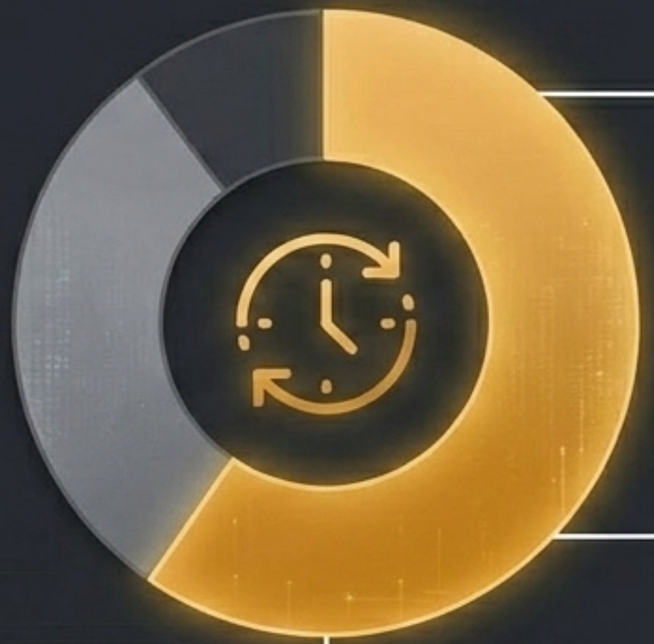
- Service Operations (Customer care, field services)
- Supply Chain & Inventory Management

Surging Demand

- AI Data Scientists (50% of orgs need more)
- Machine Learning Engineers
- Emerging: AI Compliance Specialists (Hired by 13% of orgs)
- Emerging: AI Ethics Specialists (Hired by 6% of orgs)

38% of organizations expect no change in total workforce size over the next three years. AI is driving a massive reallocation of skills rather than a blanket reduction in headcount.

Reallocating Saved Time



- Pursuing entirely new, higher-value activities
- Expanding time spent on existing, unautomated responsibilities
- Direct headcount reduction (predominantly localized to specific functions in larger enterprises)

High-performing organizations utilize AI to create hybrid intelligence superpowers. They reinvest saved hours into domain expertise and innovation, rejecting the limited mindset of pure cost-cutting.

Key Takeaways

1. Think Bigger

Shift strategic objectives from incremental efficiency to transformative, enterprise-wide innovation.

2. Redesign Work

Scaled value requires fundamentally rewiring how work is done, not simply layering AI over legacy processes.

3. Govern Proactively

Trust, observability, and human-in-the-loop protocols are mandatory prerequisites for operating Agentic AI.

4. Lead from the Top

CEO and C-Suite oversight is the single strongest correlate to achieving meaningful, AI-driven EBIT impact.