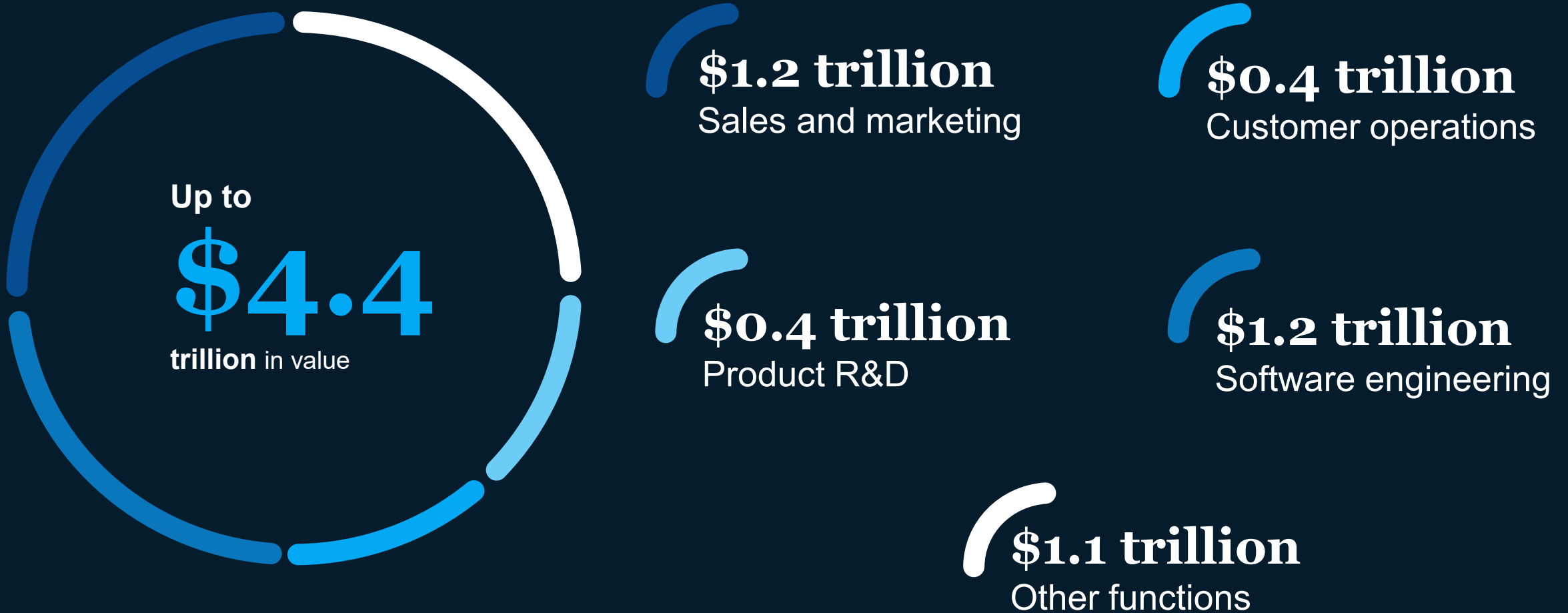


AI is eating the world (just not the P&L yet)

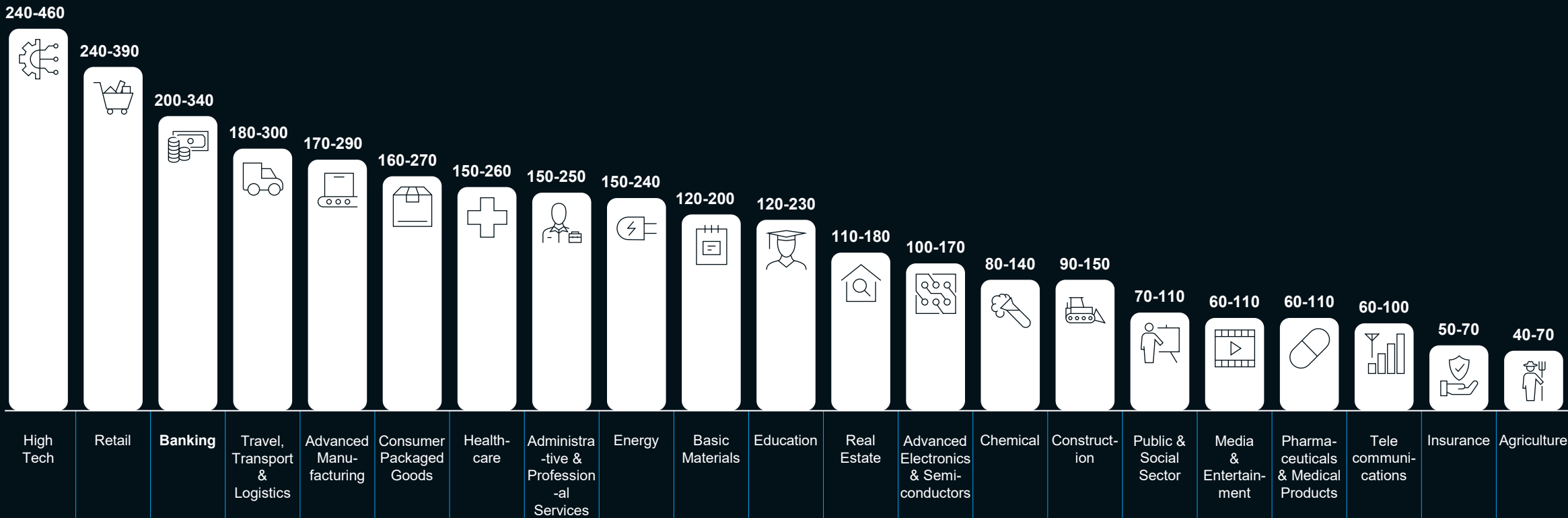
2025 | Agents and GenAI

2023: We estimated GenAI is poised to unlock **trillions** of dollars of value, with 80% coming from 4 functions



Not all sectors are impacted the same

Generative AI productivity impact by sector (Total, \$ billion)



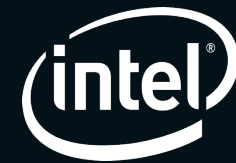
Source: McKinsey report, The economic potential of generative AI: The next productivity frontier

GenAI/Agentic is already having a massive impact in our businesses – examples (1/6)

AI cuts time-to-hire by 30–50%, boosts qualified candidate pools by 55%

GenAI tools now screen resumes, analyze video interviews, and draft outreach — dramatically reducing time-to-hire and cost-per-hire and making recruiters shift focus to final interviews

Unilever



GenAI/Agentic is already having a massive impact in our businesses – examples (2/6)

From idea to online store in 48 Hours — AI powers Fast Fashion 2.0

Retailers integrate GenAI to co-create products with customers, generate live marketing content, and fulfill demand in real time — rewriting the rules of commerce



INDITEX

STITCH FIX



GenAI/Agentic is already having a massive impact in our businesses – examples (3/6)

Personalized Learning with GenAI tutors goes mainstream

Education platforms deploy GenAI to provide real-time, tailored learning — closing achievement gaps and boosting outcomes in under-resourced classrooms



Socratic

Quizlet



duolingo



Khan Academy



GenAI/Agentic is already having a massive impact in our businesses – examples (4/6)

Drug Candidates Designed by AI in 18–24 Months

GenAI platforms craft novel molecules and accelerate preclinical design, cutting years off pipelines. AstraZeneca's partnership with Absci aims to shrink antibody discovery timelines to 18–24 months

 NOVARTIS

AstraZeneca 



Insilico
Medicine



GenAI/Agentic is already having a massive impact in our businesses – examples (5/6)

Marketers launch Thousands of personalized AI ads in seconds — engagement rises 25–60%

GenAI powers ultra-targeted ad and content campaigns, leading to 25–60% higher engagement and conversion

∞ Meta



Coca-Cola



GenAI/Agentic is already having a massive impact in our businesses – examples (6/6)

Text-to-Video GenAI transforms filmmaking

GenAI turns anyone into a studio: creators use text prompts to generate entire scenes, soundtracks, and edits — democratizing storytelling like never before

 runway

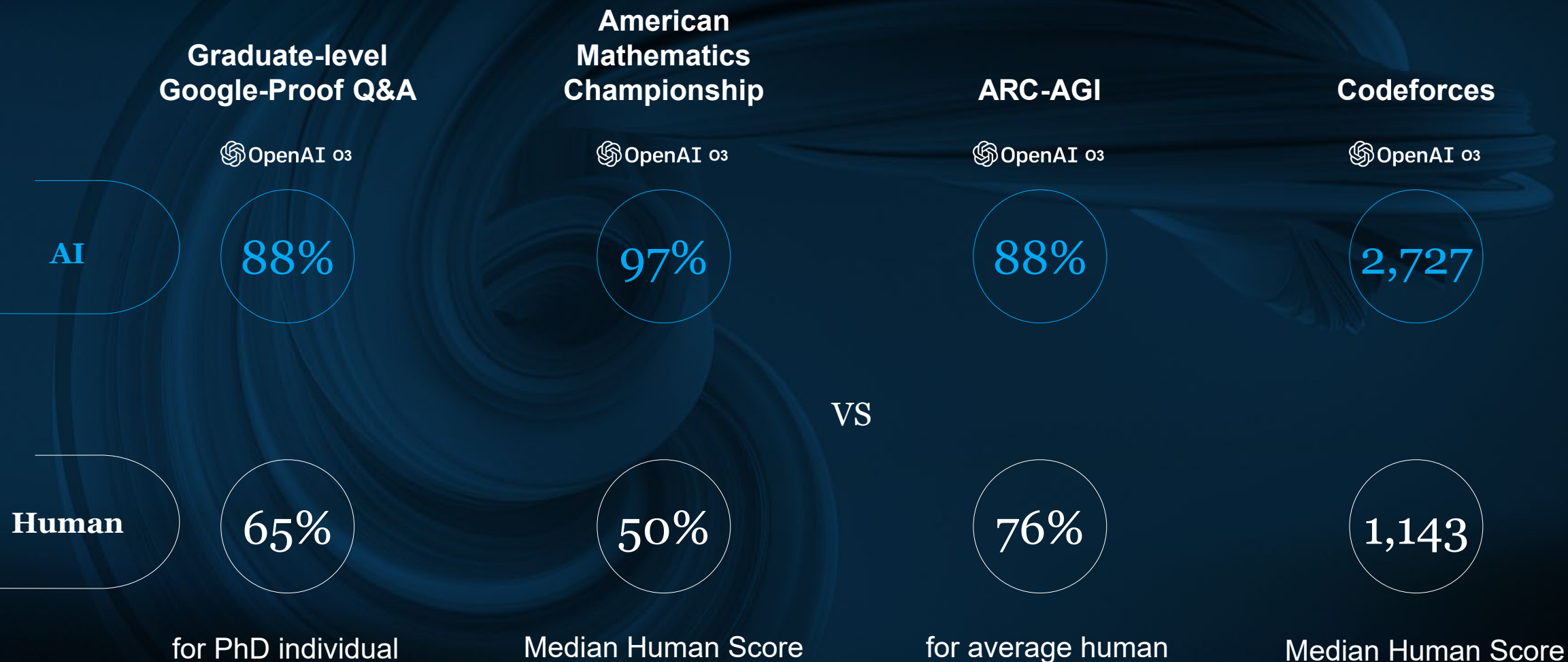
 OpenAI
Sora

Pika

 synthesia



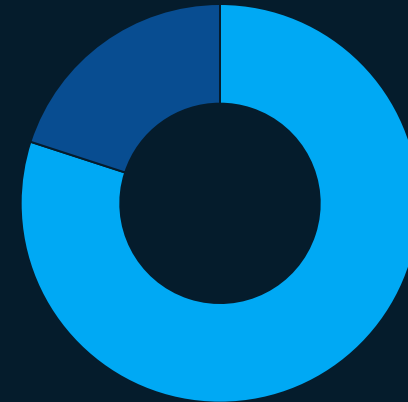
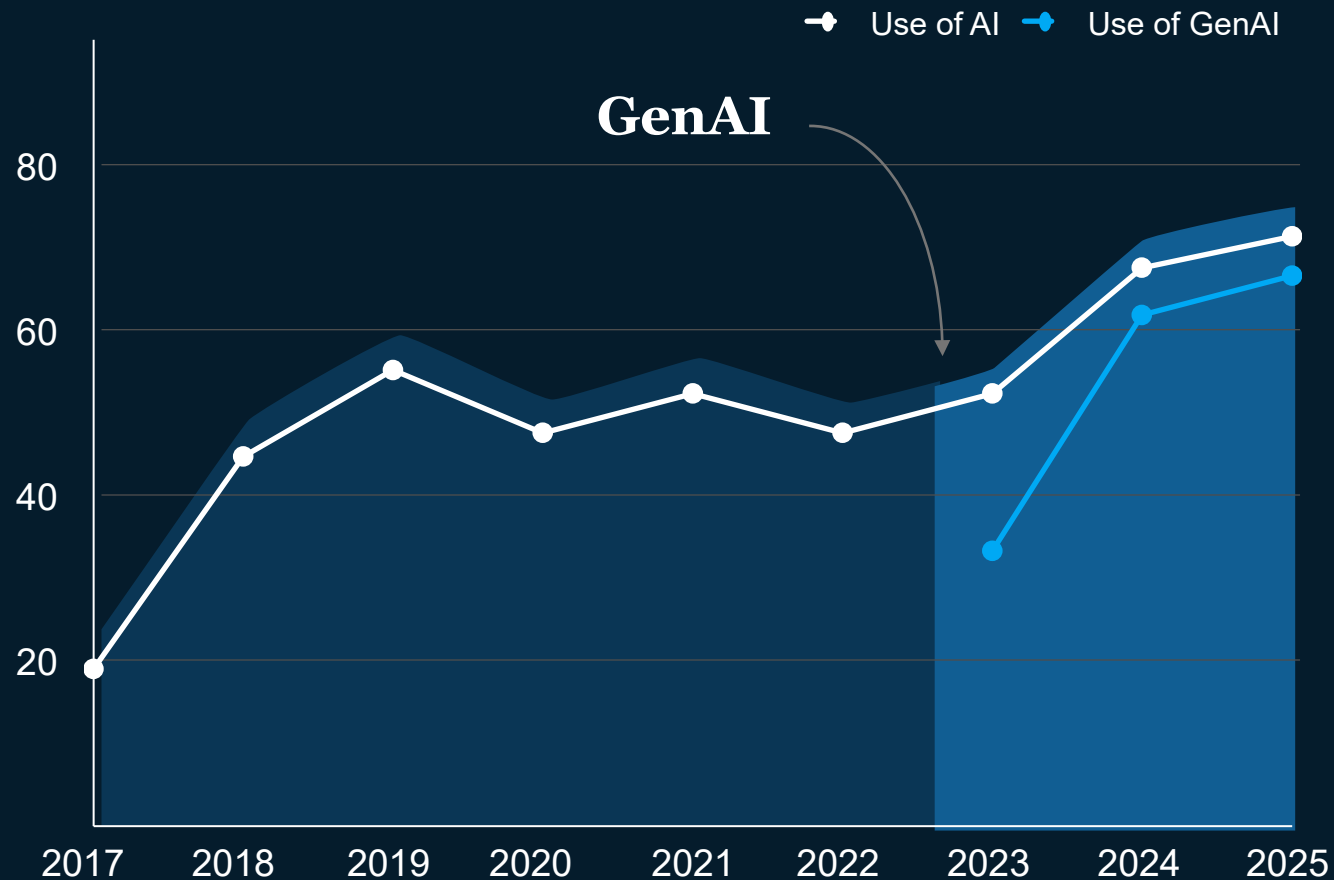
AI is beating benchmarks and human on key tests



GenAI is everywhere... except in P&L

Organizations using AI in at least 1 business function

% of respondents



80%
of companies still
report **no material
contribution to
EBIT** from GenAI
deployments

The limited P&L impact can be attributed to seven primary factors



Technology

- Technological limitations of 1st generation GenAI tools¹
- Lack of mature, packaged solutions

AI Approach

- Horizontal use cases
- Fragmented initiatives
- Siloed AI teams

People

- Cultural apprehension
- CHRO / CTIO need to team up

Data

- Data accessibility and quality gaps

1. LLMs' hallucinations, reactive/triggered by prompts, isolated from enterprise systems, single-tasks focused

WHAT is NEXT?

*Why should we believe next 3 years
will be different?*

AI Agents: a future of more integration and workflow automation

GenAI

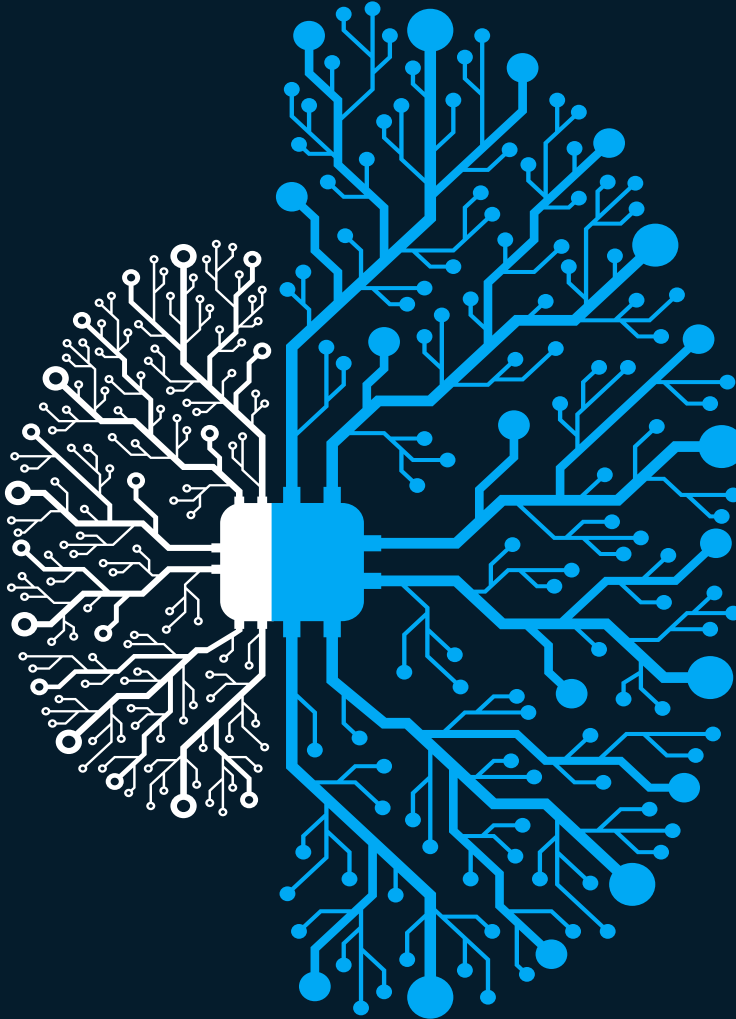
Single-task oriented



Human time / scale



Reactive



AI agents



Workflow oriented



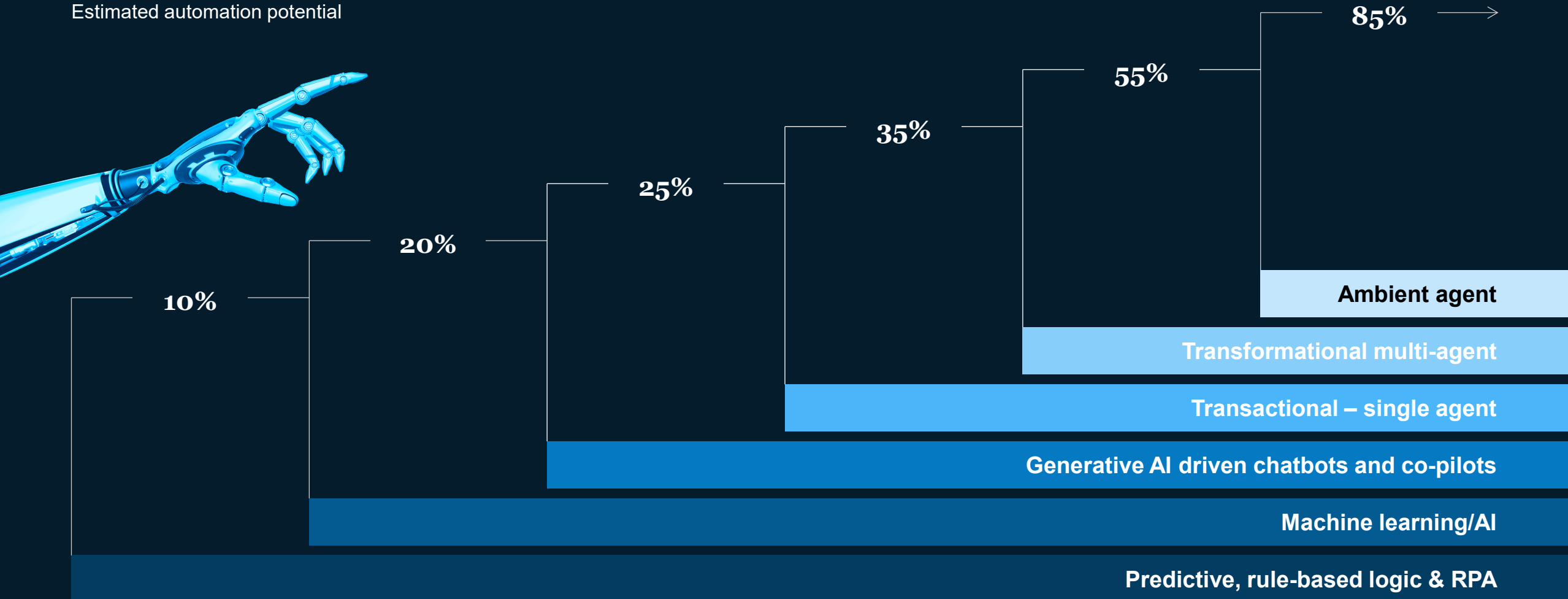
Elastic



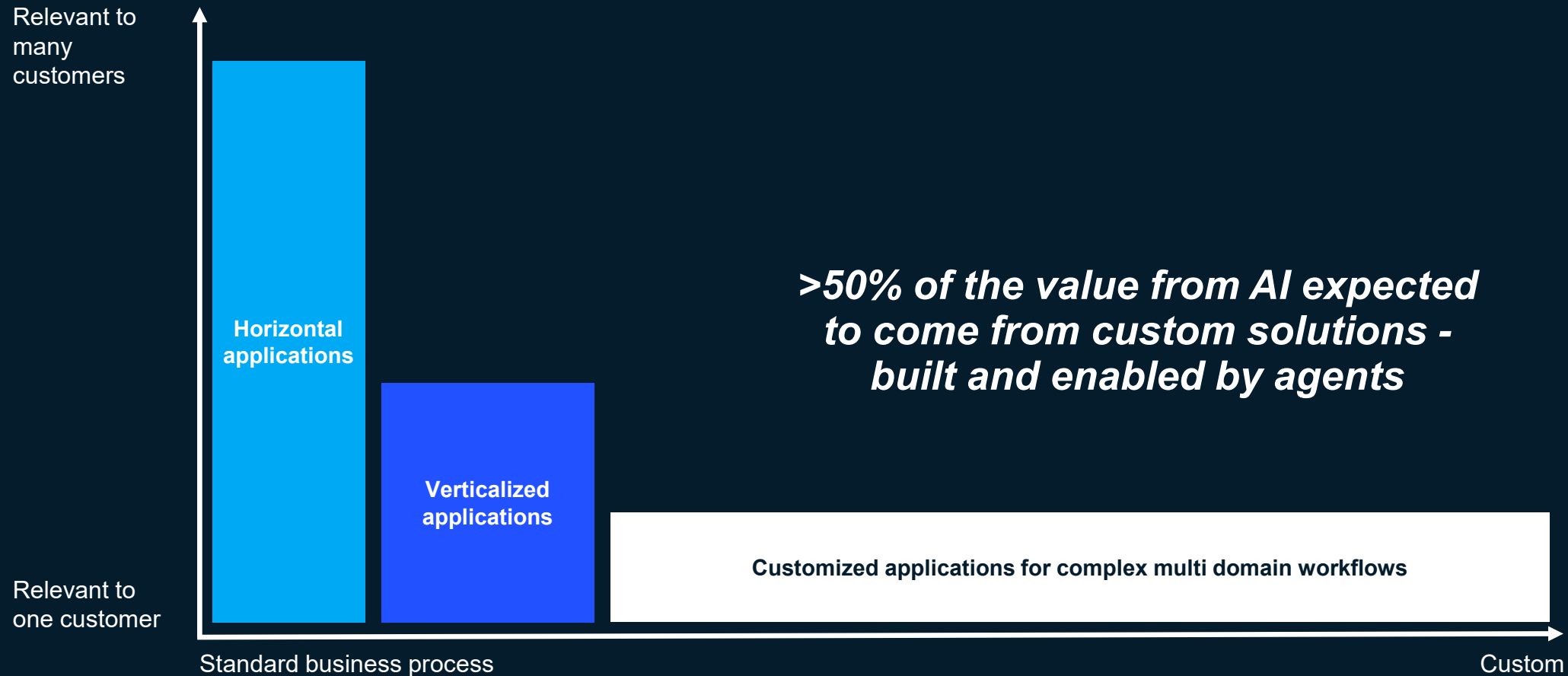
Proactive

AI Agents elevate the potential of GenAI with domain expertise and capabilities to execute complex workflows in adaptive contexts

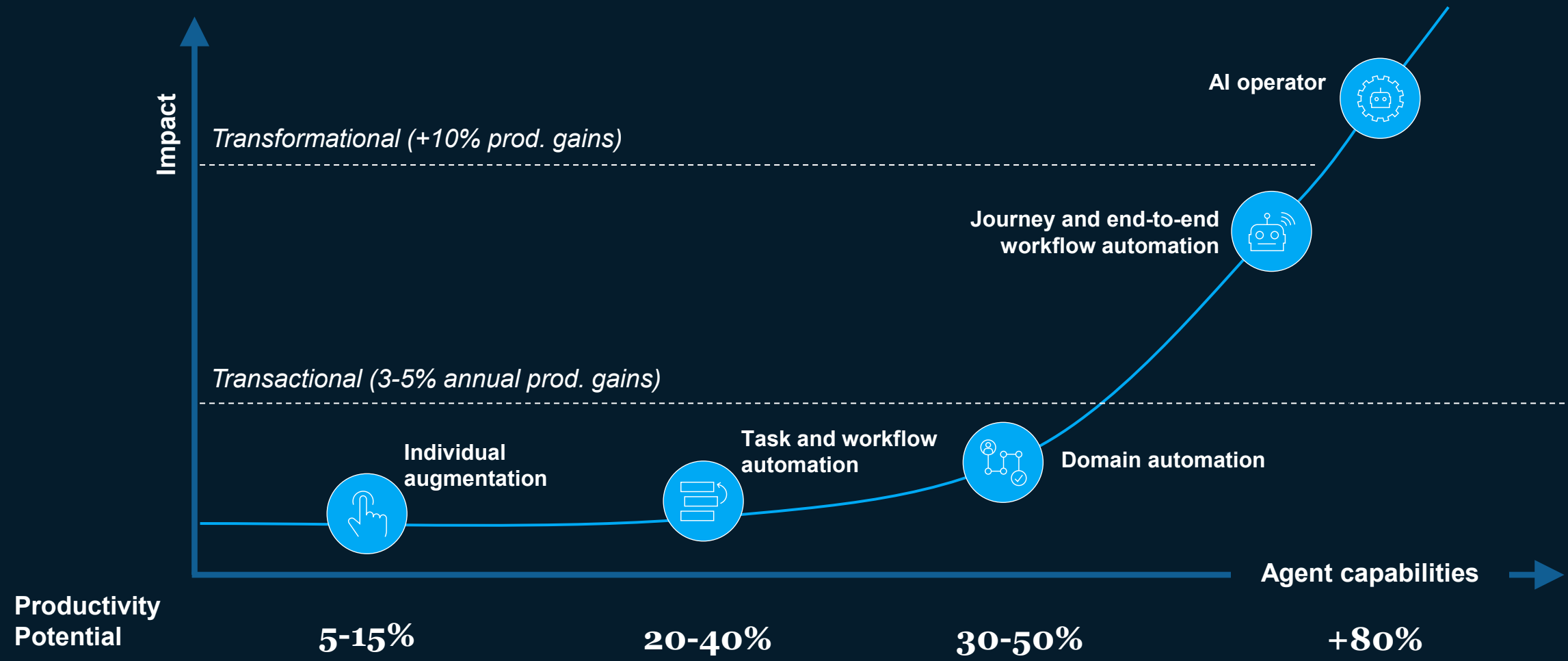
Estimated automation potential



Agentic AI will attack the complex, multi-domain workflows that software can not



Impact potential will only increase as agents become more holistic



AI Agents will evolve from ‘interns’ to experienced ‘peers’ alongside Human

Sophistication and autonomy increases

HORIZON 1

The intern



AI agents that support narrow, well-defined tasks with close oversight and limited access

Like a new hire — learning the ropes, proving reliability, and building confidence through observation and repetition

HORIZON 2

The analyst

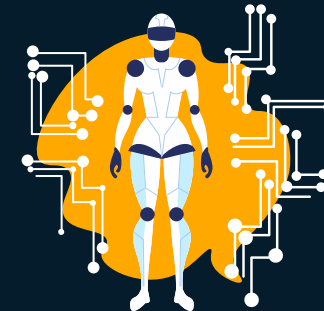


AI agents that can reason across tasks, identify patterns, and begin to **make decisions within pre-approved boundaries**

Like an experienced analyst — independently productive but still aligned to guardrails and review processes

HORIZON 3

The supervisor



High-autonomy AI agents that manage workflows, **delegate tasks to other agents or humans**, and operate with elevated permissions

Like a trusted team lead — responsible for both execution and oversight, acting in line with organizational goals

Challenges to be solved to scale Agentic



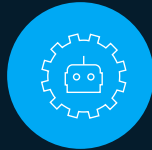
Hallucination and data risks



Human-agent collaboration



Custom & off-the-shelf agents blend



Autonomy control



Staying agile amid fast-evolving tech



Sprawl containment

Hallucinations are a feature, not a bug– *Sam Altman, CEO Open AI*

“Rewiring” organizations is likely the way to scale AI



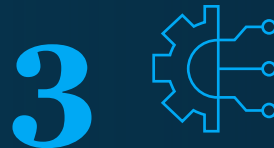
Hybrid workforce

Acculturate the workforce to work alongside agents



Technology

Adapt tech stack to orchestrate a high number of off-the-shelf and custom-built agents



Governance & Risk management

Deploy robust frameworks to control agent autonomy and prevent sprawl



Data

Accelerate data productization to ensure agents can access, understand, and use the data they need in real time



Radical org. and workflow redesign

Adopt new approaches to reconfigure workflows (e.g., Lean + Tech)

Risk should not be under-estimated

NON-EXHAUSTIVE

~40%

of companies not aware of gen AI risk



Justice and fairness



Regulatory compliance and AI governance



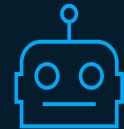
Interpretability



Human oversight and accountability



Performance



Talent



Environmental impact



Humanitarian and social

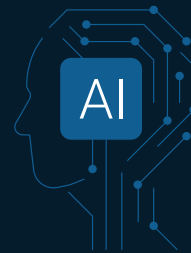


Market forces

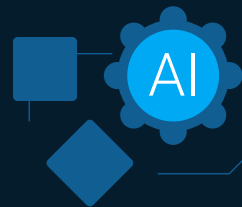
Closing thoughts



P&L likely to come more often next 3 years (Dawn of Agentic AI)



Workforce will become hybrid, changing all our jobs, organizations, processes



Not just a tech transformation (Role of the CHRO) with disruptive potential



Agent Mesh frameworks, orchestration and risk management are a critical to succeed

Thank you!