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# AGENTS FIRST

Why real AI transformation starts with an interconnected employee-agent system (not one-off tools)

**56%** of CEOs report no significant financial benefit from AI

**Only 14%** of employees use GenAI tools daily at work

**15%** productivity gain when AI is embedded in real work

A WHITE PAPER BY LEVERAGE

## Executive Summary

Most companies are "doing AI" right now, but they're not getting paid for it. PwC's 2026 Global CEO Survey found that 56% of CEOs report no significant financial benefit from AI so far, and only 12% report both cost and revenue benefits.

This gap isn't because AI models are weak. It's because most deployments are tool-first: a platform for one department, a pilot for one workflow, a chatbot for one queue. Each solution may help locally, but the organization stays globally fragmented context remains trapped in silos, handoffs still break, and leaders still don't get reliable signals they can run the business on.

**This paper argues for a different sequence:**

1. **Build employee agents first** (role-specific, personalized, trusted)
2. **Connect them across the organization** (shared context + governed data access)
3. **Then automate workflows** (task optimization happens on a foundation that can compound)

### Key Evidence

When AI is embedded into real work, productivity can move materially. A large field study in customer support found AI assistance increased issues resolved per hour by ~15% on average (with larger gains for newer/lower-skilled workers).

**Only 14%** of employees use GenAI tools daily at work (PwC 2025)

**3x faster** speech input vs typing for mobile text entry

**The practical takeaway:** AI transformation becomes real when it becomes normal—when every role has an agent they actually use, and those agents are connected enough to create near real-time feedback loops across the business.

## The Core Problem: Tool-First AI Creates “Islands of Help”

### The Pattern We See in the Market

Most AI initiatives begin with a tool that solves a single problem: a sales assistant that writes follow-up emails, a support bot that suggests answers, a marketing generator that accelerates content, an operations automation that routes forms.

These are not bad ideas. The issue is what happens next: the organization never becomes a system. Even strong point solutions tend to create AI islands:

- Each team develops its own prompts, processes, and “best practices”
- Each tool has its own context, and that context doesn't transfer
- Handoffs still rely on people translating meaning between departments
- Leaders get dashboards and outputs but not a living feedback loop that tightens execution

**So AI becomes “extra work” instead of “how work happens.”**

## Why This Leads to “Pilot Purgatory”

PwC’s 2026 CEO data captures the consequence clearly: most companies are experimenting, but most aren’t seeing consistent financial return. PwC also highlights a crucial divider: CEOs reporting both cost and revenue gains are far more likely to have embedded AI broadly across the organization and PwC explicitly notes that foundations matter as much as scale.

**In other words, the winners aren’t just “using AI.” They’re building the conditions where AI can actually compound.**

## The Missing Piece: The Employee Layer

Work doesn’t happen in platforms. Work happens through people: a manager coaching a team, a rep in a home deciding what to say next, a call center agent making judgment calls under pressure, finance reconciling messy reality into clean reporting, HR trying to onboard consistently across locations.

**If AI is not anchored to these roles and adopted inside their daily flow it stays theoretical.**

## The Alternative: Employee Agents First

### What an Employee Agent Actually Is

An employee agent is not a generic chatbot. It’s a role-specific, personalized AI partner that:

- Understands the employee’s responsibilities and decisions
- Knows what “good” looks like for that role (standards, policies, operating rhythms)
- Has governed access to the right business context
- Can capture and return learnings continuously (so the system improves)

**When every employee has this, AI stops being a project. It becomes a capability.**

### Why the Agents Must Be Interconnected

If agents remain isolated, you’ve just recreated tool silos in a new form. Interconnection is what creates compounding impact:

- Marketing launches a campaign or initiative then sales and support know exactly how it should sound and work
- Field reality changes and leadership sees it quickly and adjusts
- Support learns what causes cancellations so ops fixes upstream causes
- Finance flags margin drift and managers get coaching in the moment, not at month-end

**This is the difference between automation and a living system.**

#### Practitioner Note: Why “Systems First” Matters

One of the clearest lessons we’ve seen in transformation work: when organizations pursue modernization as separate local initiatives, they unintentionally duplicate capabilities, fragment data, and waste resources. The breakthrough comes only after shifting to a single systems approaching the foundational structure so each improvement reinforces the whole.

## Evidence: Adoption, Productivity, and Voice

### 1. AI Changes Outcomes When Embedded in the Job

A major field study (customer support, thousands of agents) found that AI assistance increased productivity by ~15% measured as issues resolved per hour, with gains concentrated among less experienced workers. This matters because it's real work, not a lab demo and it shows AI can uplift performance through learning and guidance inside the workflow.

### 2. Adoption Is the Bottleneck

Organizations can't compound what people don't use. PwC reports that only 14% of employees use GenAI tools daily at work. And PwC's 2026 CEO findings show most companies still aren't translating AI spend into financial return.

**This gap between investment and daily behavior is the real battlefield: AI value doesn't appear when you "buy a tool." It appears when AI becomes a daily operating muscle.**

### 3. Why Voice Agents Matter

Voice is not a gimmick. It's a behavioral advantage. A controlled study found speech input was ~3.0x faster in English than typing on smartphones, with lower error rates.

That has direct implications: People don't want to stop and type perfect prompt mid-work. Speaking is faster, more natural, and closer to how humans already coach, ask, and decide. Voice interactions make the agent feel like "a present partner," not "another system." If adoption is the bottleneck, voice is one of the cleanest levers to increase usage without increasing friction.

### 4. Marketing as Proof of Speed Compounding

BCG reports large speed impacts in marketing transformations enabled by GenAI, including "10x faster campaign go-live" and time-to-market collapsing from months to weeks. The headline: when AI is operationalized as a system (not a tool), speed becomes structural.

## What "True AI Implementation" Looks Like

**True AI implementation is not a platform. It's an operating model.**

Most businesses are still measuring AI success like software procurement: Did we launch it? Did we integrate it? Did we train the team? But the real test is operational: Did it change daily decisions? Did it improve handoffs? Did it shorten feedback cycles? Did it raise standards consistently without constant policing?

## The Agents-First Maturity Model

### Level 1 — Role Agents (Personal + Trusted)

Each employee has a role-specific agent that helps them execute in the flow of work.

### Level 2 — Connected Context (Shared Truth + Governance)

Agents share the right context across departments, with permissions aligned to business reality.

### Level 3 — Feedback Loops (Learning Becomes Continuous)

Coaching, standards, and operating rhythms become near real-time instead of monthly/quarterly.

### Level 4 — Workflow Automation (Task Optimization Compounds)

Automations are built on a stable foundation—so they don't create new silos.

This sequence maps to the CEO reality PwC highlights: organizations with strong AI foundations are significantly more likely to report meaningful returns.

## Governance Makes Scale Possible

Employee agents only work when trust is built into the system: responsible AI principles, role-based access, clear boundaries on sensitive data, and transparency about how the agent is used. PwC explicitly calls out responsible AI frameworks as part of what differentiates companies seeing returns.

## Outcomes by Role

*This is written for SMBs, franchises, and multi-location networks but the pattern holds in any operating model where execution depends on handoffs.*

**Executive / CEO:** Leaders don't need more dashboards. They need fewer blind spots and faster decision cycles. An interconnected agent system turns operational reality into comparable signals, so decisions aren't based on anecdotes and lagging reports.

**Management / Operations:** Managers spend huge amounts of energy translating direction into action. With agents in the workflow, expectations become role-ready and coaching becomes consistent so execution improves without requiring hero managers.

**Customer Support:** Support is the clearest example of embedded AI impact. The bigger win is consistency: fewer "depends on who you get" outcomes, faster ramp, and a tighter loop between what customers complain about and what the business fixes.

**Sales / Field Teams:** Field roles win when the agent is present in the moment: before a conversation, during a decision, and immediately after capturing notes and handoffs without extra admin load. Voice matters here because speaking is materially faster than typing on mobile.

**Marketing:** Marketing only “works” when the field can run it. With connected agents, marketing stops throwing campaigns “over the wall.” The field gets role-ready guidance the same day.

**HR / People Ops:** Agents give new hires immediate answers, give managers reinforcement without extra meetings, and reduce the variance that kills retention.

**Finance:** Finance rarely fails because of spreadsheets. It fails because upstream inputs are messy, late, or inconsistent. Connected agents shift finance from chasing to steering because data capture becomes standardized at the source.

## Implementation: Avoiding the “AI Tool Graveyard”

### Phase 1: Start Where Work Happens (3–5 Roles, 30–45 Days)

Pick roles that touch the operational heartbeat: operations/management, customer support, field/sales, marketing enablement, finance inputs. Build each role agent with the role’s standards, allowed data access, and a tight set of “daily moments” where the agent will be used.

**The goal of Phase 1 is not “automation.” The goal is adoption + trust + proof that it improves the workday.**

### Phase 2: Connect Agents Across Handoffs

Map the handoffs that create friction: marketing → sales, sales → install/service, support → operations, operations → finance, HR → managers/new hires. Then make the agent network responsible for carrying context across handoffs, capturing outcomes, and feeding learnings back into the system.

**This is where feedback loops become real.**

### Phase 3: Automate After the System Is Stable

Once the employee layer is working, task automation becomes safer and more valuable: it uses shared context, reinforces standards, becomes measurable and governable, and compounds instead of fragmenting.

## Success Metrics That Actually Matter

Instead of tracking “AI usage” as a vanity metric, track:

- % of employees using their agent weekly/daily
- Time saved in key workflow moments (handoffs, updates, coaching)
- Speed to deploy initiatives from leadership to frontline
- Throughput improvements (e.g., support productivity)
- Reduction in cycle time (campaigns, decisions, issue resolution)

## Conclusion

**AI transformation isn't a collection of tools. It's a shift in how the company learns and executes.**

Right now, the market is proving a hard truth: most AI investment isn't producing consistent financial benefit yet. At the same time, we have clear evidence that when AI is embedded in real work, productivity can move.

**The difference is sequencing and system design.**

When you start with employee agents, you're building where work happens. When you connect those agents, you turn your org into a living system with real feedback loops. And when you automate tasks last, those optimizations compound instead of creating new silos.

**That's what "true AI implementation" looks like: holistic, employee-based, interconnected—built for adoption, trust, and compounding impact.**

## References

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