

The AI Identity Gap

Why Many Firms Build AI Capability Before They Redesign the Business Around It

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7,758 firms
observed in Echo

1,131,045 professionals
represented in Echo

343,020 job records
represented in Echo

32.4% of firms
show at least one AI signal

Executive summary

One of the easiest mistakes in enterprise AI is to confuse AI activity with AI transformation. Many firms are adopting AI tools and hiring AI talent, but far fewer are redesigning how their business actually operates to use it. This gap between capability and organizational change is what this paper calls the *AI identity gap*. That distinction matters because the constraints on enterprise AI are no longer primarily technical. AI tools are broadly available, AI experimentation is widespread, and public AI discourse is now loud; the harder problem is redesigning the organization around the technology. [1–5]

This Echo Intelligence Report uses a fixed 2025 export from Echo to study this problem across 7,758 firms, 1,131,045 professionals, and 343,020 job records. Echo allows us to separate three observable layers of change: *organizational AI identity*, *AI capability formation*, and *workforce role signals*. Organizational AI identity means that AI is central to how the firm defines its direction and priorities externally—not just something it uses internally.

The pattern is clear. Within the observed Echo sample, 32.4% of firms show at least one AI-related signal, 21.4% show visible AI capability in their technical stack, but only 10.1% have made AI central to how they define their business. Workforce traces point in the same direction: the export contains 1,565 AI/ML/GenAI/agentive role records across 343,020 job records and 984 unique professionals with explicitly AI-titled roles across more than 1.13 million observed professionals. New AI role entries rise from 63 in 2017 to 123 in 2024, but the formal title layer remains thin relative to the total observed workforce base.

The managerial implication is this report's core contribution. When firms add AI technologies and specialist talent but have not yet changed how the business operates, the likely bottleneck is not

access to tools. It is alignment. Platform and talent may be moving first, while process redesign, governance, managerial routines, incentives, and culture lag behind. For leaders and boards, this is the real value of the AI identity gap: it highlights a transformation risk. AI can arrive in the stack before it arrives in the system, and when that happens, firms may generate local wins without capturing the full enterprise-level ROI they have begun to promise.

Core Claim

The AI identity gap is not primarily a branding gap. It is a systems gap. Firms often build AI capability before they redesign the operating model and broader organizational system around it. The companies that capture durable value will be the ones that align *platform, people, and processes* fast enough for AI to become part of how the business actually runs.

Identity

The durable public-facing story about what the firm is becoming.

Echo signal: organizational AI identity

People

Roles, skills, hiring demand, managerial readiness, and talent architecture.

Echo signal: workforce role traces

Process

Workflow redesign, governance, decision rights, risk controls, and operating routines.

Executive question: has AI changed how work is done?

Platform

Tools, models, infrastructure, and technical capability build-out.

Echo signal: AI stack proxy

Reading the Gap

Durable AI transformation requires alignment across people, processes, and platforms. When platform and talent signals move materially ahead of identity, the executive risk is that AI is being added to the company faster than the company is being redesigned around AI.

Why the harder problem is organizational

Enterprise AI no longer fails for lack of tools. According to McKinsey's late-2025 global survey, 88% of respondents say their organizations regularly use AI in at least one business function, yet only 39% report enterprise-level EBIT impact from AI [2]. McKinsey's March 2025 Rewired survey finds that redesigning workflows has the strongest contribution to EBIT impact from generative AI, but only 21% of respondents say their organizations have fundamentally redesigned at least some workflows [1]. In a separate workplace study, McKinsey reports that 92% of companies plan to increase AI investment over the next three years while only 1% describe themselves as mature in AI adoption [3]. BCG frames the same point more bluntly: in its 10-20-70 view of AI value creation, only 10% of value comes from algorithms and 20% from data and technology, while 70% comes from people and process change [4]. Even public-market discourse reflects the intensity of the

moment: FactSet finds AI was cited on 68% of S&P 500 fourth-quarter 2025 earnings calls, including 91% of Financials calls and 94% of Information Technology calls [5].

Taken together, those findings point to a simple conclusion. The scarce resource in enterprise AI is no longer access to models. It is organizational redesign. Tools can be purchased. Pilots can be launched. Specialist teams can be assembled. But enterprise value only materializes when workflows are rewritten, decision rights are redistributed, managers are retrained, incentives are updated, and governance becomes operational rather than symbolic. That is why the harder problem is organizational: the binding constraint has shifted from technical availability to enterprise alignment.

What Echo measures

Echo is a multi-signal enterprise intelligence platform that normalizes public organizational signals into a common company view. For this report, we use three signal families.

Table 1. Signal families used in this report.

Signal family	Working definition	Why leaders should care
Organizational AI identity	AI is central to the firm's durable public-facing narrative about direction, priorities, and distinctive capability.	Identity coordinates attention. When AI becomes part of the firm's self-definition, it is more likely to shape leadership focus, governance, talent expectations, and strategic resource allocation.
AI capability formation	AI frameworks, cloud AI services, and modern generative-AI tooling are visible in the firm's aggregated technical footprint.	Capability signals show that AI build-out is happening in the technical layer, whether or not the broader organization has caught up.
Workforce role signals	AI/ML/GenAI/agentic roles appear in workforce histories and job records.	Talent signals show whether AI work is being formalized in hiring demand and role architecture, or whether it remains thin and concentrated.

These three layers matter because they do not necessarily move together. A firm can have AI in the stack before it has AI in the story, and it can have both before it has fully changed the operating model and broader organizational system around them. In this report, operating model refers to workflows, decision rights, governance, and delivery routines. The broader organizational system

includes that operating model plus the surrounding talent model, incentives, culture, and managerial narrative that make change durable.

What Echo observes in 2025

The first result is simple: visible AI capability is materially more common than organizational AI identity in the observed sample. Echo counts 782 firms with organizational AI identity (10.1%), 1,658 firms with an AI stack proxy (21.4%), and 2,510 firms with at least one AI-related signal of any kind (32.4%). In other words, firms in the sample are about twice as likely to show AI in their technical footprint as they are to make AI central to the durable story they tell about the business.

Table 2. Top-line Echo findings.

Indicator	Count	Share	Executive reading
Organizational AI identity	782 firms	10.1%	AI is central to the firm's durable public-facing narrative.
AI stack proxy	1,658 firms	21.4%	AI capability is visible in the technical footprint.
Any AI signal	2,510 firms	32.4%	AI is visible somewhere in the organizational footprint, even when it is not yet identity-defining.
AI/ML/GenAI/agentic role records	1,565 records	0.46% of job records	Explicit AI titles are growing, but remain thin relative to observed work histories.
Unique professionals with AI-titled roles	984 people	0.09% of professionals	Specialist AI identity in the workforce exists, but remains concentrated rather than broad-based.

The workforce layer reinforces the same pattern. New AI role entries rise from 63 in 2017 to 123 in 2024, and the fixed 2025 measurement period includes 106 additional entries. Growth is real, but the title layer remains thin relative to the total observed workforce base. That is what leaders would expect in a transitional market: AI work is clearly expanding, but it has not yet thickened into a dominant or broad-based role architecture.

The pattern is not confined to one industry. Echo shows meaningful AI stack-proxy prevalence in banking (17.2%), insurance (22.8%), hospitals and health care (28.6%), financial services (19.6%), and software development (19.9%). The executive point is not that these sectors transform in the same way. Visible AI capability is showing up across many industries, even though they operate under

very different governance, regulatory, and business-model constraints. That makes the identity question more important: when AI is present in the technology, what has actually changed in how the business operates around it?

The central reading. Echo points to a consistent ordering: AI becomes visible in technologies, hiring demand, and specialist roles before it becomes central to how many firms define themselves. The important managerial inference is not that AI is absent. It is that transformation is uneven. Many organizations appear to be advancing the platform layer faster than the system around it.

Why the AI identity gap matters for leaders

The AI identity gap is not chiefly a communications issue. It is a coordination issue. Identity matters because it helps decide what receives leadership attention, capital, governance, and managerial time. When AI becomes central to the firm's durable narrative, the organization is more likely to attach accountability, process redesign, capability building, and operating discipline to it. When capability formation is visible but identity has not moved, AI can remain trapped as a tooling program, a specialist-team agenda, or a set of local experiments.

That is why the gap matters economically, not just rhetorically. If the board-level investment case assumes broad productivity gains, faster cycle times, better decision quality, or new growth, but the implementation remains concentrated in copilots, pilots, and isolated experts, the company is unlikely to capture the full ROI implied in the board narrative. McKinsey's evidence makes the reason clear: AI use is widespread, but enterprise-level EBIT impact is still far less common, and workflow redesign is the factor most strongly associated with value capture [1, 2]. BCG's 10-20-70 framing leads to the same management implication: most of the value from AI depends on redesigning work, teams, and operating routines rather than merely deploying tools [4].

In other words, AI in the stack without AI in the system is not a stable end state. It usually means the technology transition has started while the organizational transition remains incomplete. That gap shows up in familiar ways: local productivity gains that do not aggregate to enterprise performance, AI teams that remain disconnected from core business processes, governance that sits beside the business instead of inside it, and leadership narratives that still describe the company as if its operating logic has not changed.

Table 3. A leadership diagnostic for reading the AI identity gap.

What leaders see	What it usually means	Leadership priority
High AI capability formation, low organizational AI identity	The firm is building AI capability, but AI is not yet central to the	Move beyond tooling. Tie AI to value pools, workflow redesign,

	durable story the company tells about its direction.	governance, and business priorities.
Growing AI hiring or specialist roles, but weak diffusion beyond expert teams	Talent investment is occurring ahead of broader operating-model change.	Shift from expert islands to manager-led adoption in core workflows and functions.
Strong AI identity, weaker capability formation	The story is moving faster than the system.	Invest in technical foundations, data readiness, productization, and execution discipline so the narrative is backed by repeatable capability.
Strong capability, growing talent, and stronger AI identity	The organization is moving toward real alignment.	Ensure the surrounding system keeps pace: decision rights, incentives, controls, training, and management routines.

What leaders should do next

The practical question is not whether every company should call itself an AI company. The practical question is whether the company is redesigning itself deeply enough to capture the value it expects from AI. For leaders, that means a systematic shift across five fronts.

- 1. Start with where AI changes the business, not where tools are easiest to deploy.** Define the workflows, decisions, and customer or employee outcomes that matter most. A tool rollout without a value-pool hypothesis often produces activity without enterprise movement.
- 2. Redesign workflows and decision rights explicitly.** Human-AI work does not scale by accident. Leaders need to specify what is automated, what remains human-led, where review sits, and how accountability is distributed. This is the core of the operating-model shift that most AI programs underinvest in [1, 2].
- 3. Treat AI hiring as the start of diffusion, not the end of readiness.** Specialist roles are useful, but they do not by themselves transform the business. The real objective is to diffuse AI capability into line functions, managerial routines, and day-to-day ways of working.
- 4. Rewire governance, metrics, and incentives.** AI cannot remain a sidecar governance program. The controls, KPIs, risk management, and incentives need to sit inside the same operating cadence as other business priorities. Otherwise the organization can talk about scale while still behaving like it is piloting.
- 5. Update the firm's durable narrative once the system begins to move.** Narrative should not lead reality by too much, but it should not lag reality indefinitely either. Once AI is materially changing products, service delivery, risk management, software delivery, or internal

operations, the company's external story should help orient the market and the workforce around that shift.

Board-level implication. The question for boards is no longer whether management has bought AI tools or hired AI specialists. The question is whether management is redesigning the enterprise so that those investments can compound. If the answer is no, the organization may show AI momentum without delivering the full business case.

Conclusion

A company can have AI in its stack long before it reflects AI in how it defines its business. Echo suggests that many do. The executive lesson is not to force an AI label onto every firm. It is to recognize that capability build-out alone does not constitute transformation.

The AI identity gap matters because it reveals where organizational change is lagging. When platform and specialist talent move ahead of process, governance, managerial routines, and durable narrative, AI remains a localized capability rather than a company-wide shift. This is precisely the condition under which organizations risk missing the full return they expect from AI.

The firms that create durable advantage from AI will not be the ones that simply adopt the tools first. They will be the ones that redesign the system around those tools quickly enough for AI to become part of how the business actually works: in the workflow, in the management model, in the talent architecture, and in how the company defines what it is becoming.

Appendix A. Technical note on the Echo sample

Study design. The analysis is a cross-sectional descriptive read of a fixed 2025 export from Echo. The observational unit is the firm. The Echo Intelligence Report aggregates counts and shares rather than causal estimates.

Sample. The fixed export includes 7,758 firms, 1,131,045 professionals, and 343,020 job records.

Interpretive stance. This is an executive report. The evidence is used to characterize ordering and asymmetry across organizational layers rather than to estimate treatment effects.

Data governance. The data analyzed here originate from Echo, an enterprise intelligence platform developed by Taller. The Echo Intelligence Report aggregates firm-level and workforce-level summaries only and does not identify individual professionals. Row-level data are not publicly available.

Table 4. Supporting counts for top-line firm-level signals.

Measure	Count	Share of firms	95% Wilson CI
Data-capable (Pandas/Spark in workforce stack)	2,158	27.8%	26.8%–28.8%
AI stack proxy	1,658	21.4%	20.5%–22.3%
Organizational AI identity	782	10.1%	9.4%–10.8%
Any AI signal (union)	2,510	32.4%	31.3%–33.4%
Exploratory AI-forward cohort	130	1.7%	1.4%–2.0%

Table 5. Selected sector patterns in Echo.

Sector	n	AI stack proxy	Reading
Banking	116	17.2%	Capability build-out is visible in a sector where workflow redesign, governance, and trust are tightly coupled.
Financial Services	555	19.6%	Capability is materially present even where not every firm makes AI central to its outward direction.
Insurance	206	22.8%	AI appears operationally relevant before it is uniformly identity-defining.

Hospitals & Health Care	360	28.6%	Capability is visible in a sector where clinical, operational, and governance redesign all matter.
Software Development	1,033	19.9%	Technical firms show meaningful AI capability but still vary in how centrally AI is positioned in the company's story.

Table 6. Supporting workforce statistics.

Metric	Interpretation
AI/ML/GenAI/agentic role records: 1,565 (0.46% of 343,020 job records)	Explicit AI titles remain rare in the observed job-history layer relative to the volume of work histories.
Unique professionals with AI-titled roles: 984 (0.09% of 1.13 million professionals)	The formal AI-title layer is still thin relative to the observed professional base.
New AI role entries: 63 in 2017; 123 in 2024; 106 in the 2025 measurement period	Growth is evident, but from a small base.
Top 5 firms by AI-role records: 156 records ($\approx$ 10% of all AI-role records)	AI-specialized role traces are concentrated rather than broadly distributed.

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