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The AI Build Gap Briefing

6%

Nearly every company uses AI. 6% get 5% or more of their EBIT from it. This briefing is about the difference.

Yuri Kruman
3x CHRO, AI trainer for OpenAI, Meta and Microsoft

Adoption is solved. Value is not.

McKinsey's August 2026 survey of 1,719 organizations found nearly nine in ten use AI regularly, 44% are scaling it across the enterprise, 37% see any EBIT impact and about 6% attribute 5% or more of EBIT to AI. Gartner's October 2026 survey of 2,002 CIOs is starker: only 13% say AI has delivered significant or transformational value.

The organizations that do capture value look different. BCG finds the 7.5% of companies it calls future-built deliver 2.4 times the revenue growth of laggards, and projects dedicated AI roles rising from 7% of the workforce to 22% by 2030. McKinsey finds 32% of organizations have already skipped buying software because they could build it in-house.

That is the AI Build Gap: the distance between companies that buy AI and companies whose own people can build, ship and maintain it. The rest of this briefing shows how to find where your program stalls and what to change first.

Of 100 organizations surveyed

100	Surveyed organizations
44	Scaling AI across the enterprise
37	Seeing any EBIT impact
6	Getting 5%+ of EBIT from AI

Shares of the same 1,719 organizations McKinsey surveyed in May and June 2026. Each gate is reported separately, so read it as how far most programs get, not as a strict funnel. Source: McKinsey, The state of AI in 2026, August 25, 2026.

What moved this quarter

13%

Share of CIOs who say their enterprise has realized significant or transformational value from AI so far, in a survey of 2,002 CIOs.

Gartner, 2027 CIO and Technology Executive Agenda survey, October 19, 2026

44%

Share of CEOs who struggle to demonstrate AI-driven financial returns to stakeholders. Only 20% feel highly ready to industrialize AI.

Gartner, 2027 CEO Survey, October 20, 2026

7.5%

Share of companies that are future-built AI leaders. 41% are scaling and about half are still emerging or stagnating. Future-built firms deliver 2.4 times the revenue growth of laggards.

BCG, The Formula for Agentic AI Value (Applied AI Index 2026), September 30, 2026

62%

Share of large US enterprises building or deploying AI agents. 25% are developing multi-agent systems, up from 6% the prior quarter.

KPMG, Q3 2026 AI Quarterly Pulse Survey, September 24, 2026

32%

Share of organizations that decided against buying at least one software product because agentic coding tools let them build it in-house.

McKinsey, The state of AI in 2026, August 25, 2026

39%

Share of CEOs who now say AI increased revenue, cut costs or both, up from about one third in late 2025.

PwC, CEO Survey Snapshot, August 2026, August 4, 2026

$1.5B

Anthropic, Blackstone and Hellman & Friedman launched Ode with Anthropic, an AI implementation firm built to move mid-size companies from pilots into production. The bet: implementation, not models, is the bottleneck.

TechCrunch, Anthropic and Blackstone bet the next trillion-dollar AI business is implementation, July 15, 2026

The evidence, in eight numbers

37%

Share of organizations reporting any EBIT impact from AI, even though nearly nine in ten use it regularly in at least one function.

McKinsey, The state of AI in 2026, August 25, 2026

1 in 5

Gartner's estimate of the likelihood that an AI use case succeeds.

Gartner, 2027 CIO and Technology Executive Agenda survey, October 19, 2026

25%

Share of organizations that have moved 40% or more of their AI pilots into production. Only 20% feel highly prepared on talent.

Deloitte, State of AI in the Enterprise 2026, January 2026

31% and 17%

Only 31% of CIOs have rules for when a pilot should not go to production, and only 17% have rules for retiring low-value AI already in production.

Gartner, 2027 CIO and Technology Executive Agenda survey, October 19, 2026

7% to 22%

BCG projects dedicated AI roles will grow from 7% of the workforce in 2026 to 22% by 2030.

BCG, AI Is Starting to Pay Off (Applied AI Index 2026), September 30, 2026

40%

Share of large organizations (over $1B revenue) scaling AI agents in at least one function, up from 27%. Smaller organizations held flat at 22%.

McKinsey, The state of AI in 2026, August 25, 2026

94%

Share of CEOs who will keep investing in AI at current or higher levels even if the investments do not pay off in the next year.

BCG, AI Radar 2026, January 15, 2026

56%

Share of CEOs who said AI had delivered neither revenue growth nor cost reduction in the prior 12 months.

PwC, 29th Annual Global CEO Survey, January 19, 2026

Four deficits that stall AI programs

Inspect your program against each one. Any one of them is enough to keep a pilot from reaching production.

No internal builders

What you will see. AI champions give talks and power users write prompts, but nobody on payroll can design, ship and maintain a workflow or an agent.

What fixes it. Name Builders with time allocation and ship targets, not Champions.

Capability leaves with the vendor

What you will see. A consultant builds the tool and leaves. Six months later the team is back on the old process because nobody can fix or extend it.

What fixes it. Build with the team that will run it. No handoffs.

Adoption metrics instead of capability metrics

What you will see. Dashboards count licenses, logins and training completions. Nobody counts shipped workflows or the hours they returned.

What fixes it. Measure shipped artifacts, evals and hours returned.

Governance without execution

What you will see. There is a Chief AI Officer, a steering committee and a policy. There is no shipping cadence. Gartner finds only 31% of CIOs have rules for when a pilot should not go to production.

What fixes it. Pair every governance gate with a ship date and a kill rule.

The maturity ladder

Three rungs. The distance from Integrator to Builder is bigger than the distance from User to Integrator, and it's where the value lives.

Rung 1: AI User

Licenses

Consumes off-the-shelf tools: ChatGPT, Copilot, Claude. Pays per seat. Measures success in licenses issued and training hours. Can't build or maintain anything itself.

Rung 2: AI Integrator

Workflows

Applies AI to workflows with low-code platforms, prompt libraries and vendor agents. Captures some compounding, but the ceiling is whatever the vendor ships.

Rung 3: AI Builder

Shipped systems

Designs, deploys and maintains its own AI workflows and agents. Owns the prompts, the evaluation sets and the deployment pipeline. Each build makes the next one cheaper.

Share of companies that are future-built AI leaders. 41% are scaling and about half are still emerging or stagnating. Future-built firms deliver 2.4 times the revenue growth of laggards. Source: BCG, The Formula for Agentic AI Value (Applied AI Index 2026), September 30, 2026.

Five moves for the next 90 days

1. **Pick the two or three highest-value workflows.** Not an AI strategy. The specific workflows where AI removes the most friction today. Everything follows from that list.
2. **Build with the team, not for it.** Co-design with the people who do the work. Handoff is the most common reason a deployed tool gets abandoned.
3. **Designate Builders.** Names, titles and time allocation. Builder is a role with ship targets, not a mindset.
4. **Measure shipped artifacts.** Count builds, evals, deployments and hours returned. Not seats, logins and completions.
5. **Compound the flywheel.** Catalog prompts, evals and templates so every build makes the next one cheaper.

Five ways enterprise AI dies

The license trap. Seats at scale, no internal capacity to turn them into workflows. High invoice, low ship rate.

The strategy shelf. A strategy deck that wins approval and goes straight onto the shelf. No build follows.

The demo graveyard. Pilots that impress in the room, then die after handoff because nobody can run them.

The workshop certificate. Training that produces literacy and certificates, and nothing shipped downstream.

The governance trap. A Chief AI Officer, a committee and a policy, minus execution and shipped artifacts.

Every figure and where it comes from

This edition replaces several figures that earlier versions of this site carried and that we could not trace to a primary source on re-checking in October 2026, including a 78% enterprise AI failure rate attributed to BCG and a 14.2x output multiplier attributed to McKinsey. Neither appears in any BCG or McKinsey publication.

The four deficits, the three-rung ladder, the five failure modes, the playbook and the Build Score are Yuri Kruman's frameworks, drawn from enterprise HR and AI transformation work. They are interpretive tools, not survey results.

The research is refreshed every quarter. Each refresh re-opens every source, replaces superseded editions and logs changes in the Gap Research Ledger.

Figure	What it measures	Source	Published
44%	Share of CEOs who struggle to demonstrate AI-driven financial returns to stakeholders. Only 20% feel highly ready to industrialize AI.	Gartner, 2027 CEO Survey https://www.gartner.com/en/newsroom/press-releases/2026-10-20-gartner-says-44-percent-of-ceos-struggle-to-demonstrate-ai-financial-returns-as-technology-becomes-central-to-growth	2026-10-20
13%	Share of CIOs who say their enterprise has realized significant or transformational value from AI so far, in a survey of 2,002 CIOs.	Gartner, 2027 CIO and Technology Executive Agenda survey https://www.gartner.com/en/newsroom/press-releases/2026-10-19-gartner-survey-finds-only-13-percent-of-cios-say-their-enterprise-has-realized-significant-or-transformational-value-from-ai	2026-10-19
1 in 5	Gartner's estimate of the likelihood that an AI use case succeeds.	Gartner, 2027 CIO and Technology Executive Agenda survey https://www.gartner.com/en/newsroom/press-releases/2026-10-19-gartner-survey-finds-only-13-percent-of-cios-say-their-enterprise-has-realized-significant-or-transformational-value-from-ai	2026-10-19
31% and 17%	Only 31% of CIOs have rules for when a pilot should not go to production, and only 17% have rules for retiring low-value AI already in production.	Gartner, 2027 CIO and Technology Executive Agenda survey https://www.gartner.com/en/newsroom/press-releases/2026-10-19-gartner-survey-finds-only-13-percent-of-cios-say-their-enterprise-has-realized-significant-or-transformational-value-from-ai	2026-10-19
7.5%	Share of companies that are future-built AI leaders. 41% are scaling and about half are still emerging or stagnating. Future-built firms deliver 2.4 times the revenue growth of laggards.	BCG, The Formula for Agentic AI Value (Applied AI Index 2026) https://www.bcg.com/publications/2026/the-formula-for-agentic-ai-value	2026-09-30
7% to 22%	BCG projects dedicated AI roles will grow from 7% of the workforce in 2026 to 22% by 2030.	BCG, AI Is Starting to Pay Off (Applied AI Index 2026) https://www.bcg.com/press/30september2026-ai-starting-to-pay-off-companies-generate-value	2026-09-30
62%	Share of large US enterprises building or deploying AI agents. 25% are developing multi-agent systems, up from 6% the prior quarter.	KPMG, Q3 2026 AI Quarterly Pulse Survey https://kpmg.com/us/en/media/news/q3-ai-pulse-2026.html	2026-09-24
44%	Share of organizations scaling AI across the enterprise, up from 38% a year earlier. The other 56% are still in pilots or single functions.	McKinsey, The state of AI in 2026 https://www.mckinsey.com/capabilities/quantumblack/our-insights/the-state-of-ai	2026-08-25
37%	Share of organizations reporting any EBIT impact from AI, even though nearly nine in ten use it regularly in at least one function.	McKinsey, The state of AI in 2026 https://www.mckinsey.com/capabilities/quantumblack/our-insights/the-state-of-ai	2026-08-25
6%	AI high performers: organizations that attribute at least 5% of EBIT to AI. Unchanged from 2025.	McKinsey, The state of AI in 2026 https://www.mckinsey.com/capabilities/quantumblack/our-insights/the-state-of-ai	2026-08-25
32%	Share of organizations that decided against buying at least one software product because agentic coding tools let them build it in-house.	McKinsey, The state of AI in 2026 https://www.mckinsey.com/capabilities/quantumblack/our-insights/the-state-of-ai	2026-08-25

Sources, continued

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39%	Share of CEOs who now say AI increased revenue, cut costs or both, up from about one third in late 2025.	PwC, CEO Survey Snapshot, August 2026 https://www.pwc.com/gx/en/1/issues/c-suite-insights/ceo-survey/snapshot-august-2026.html	2026-08-04
$1.5B	Anthropic, Blackstone and Hellman & Friedman launched Ode with Anthropic, an AI implementation firm built to move mid-size companies from pilots into production. The bet: implementation, not models, is the bottleneck.	TechCrunch, Anthropic and Blackstone bet the next trillion-dollar AI business is implementation https://techcrunch.com/2026/07/15/anthropic-blackstone-bet-the-next-trillion-dollar-ai-business-is-implementation-not-models	2026-07-15
56%	Share of CEOs who said AI had delivered neither revenue growth nor cost reduction in the prior 12 months.	PwC, 29th Annual Global CEO Survey https://www.pwc.com/gx/en/ceo-survey/2026/pwc-ceo-survey-2026.pdf	2026-01-19
94%	Share of CEOs who will keep investing in AI at current or higher levels even if the investments do not pay off in the next year.	BCG, AI Radar 2026 https://www.bcg.com/publications/2026/as-ai-investments-surge-ceos-take-the-lead	2026-01-15
25%	Share of organizations that have moved 40% or more of their AI pilots into production. Only 20% feel highly prepared on talent.	Deloitte, State of AI in the Enterprise 2026 https://www.deloitte.com/content/dam/assets-shared/docs/about/2025/state-of-ai-2026-global.pdf	2026-01