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FUTURES

AI Cultures and Agentic Darwinism

Why survival of the fittest starts with a leadership mindshift

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Summary

- AI culture, not just AI adoption, determines your survival. Organizations treating AI as a productivity tool are being outpaced by those rebuilding their operating models around it.

- In partnership with venture capitalist Jeremiah Owyang, we identify four cultures on a spectrum: AI Follower (wait and see), AI Forward (augment carefully), AI First (AI as default), and AI Native (AI as the reason for existence). An organization's AI culture determines its progression and odds of survival.
- AI Native companies demonstrate quantifiable performance advantages, particularly in revenue per employee (RPE), a clear measure of how thoroughly an organization has transformed how value is created.
- A bimodal strategy prescribes how to evolve: Mode 1, optimization, generates the savings and credibility to fund Mode 2, innovation.
- Where you stand on the AI Evolution Arc, from Optimize to Integrate to Reimagine to Reinvent, determines your competitive fitness. The evolutionary stages are not a guaranteed progression, and organizations stuck in Optimize Mode face the highest risk of extinction.

Picture two CEOs, each investing millions in AI. The first asks: "How can we use AI to do what we already do, but more efficiently, faster, and less expensively?" The second asks: "What if we rebuild our entire operating model around AI?"

> **Welcome to the era of AI Darwinism, where survival belongs not to those who deploy the most AI tools, but to those willing to ask the harder question: What becomes possible when we build with AI at the core, not as an add-on to yesterday's models?**

One year later, the first CEO has a chatbot that saves employees 20 minutes a day, time that promptly vanishes into the ether of Teams messages, emails, and meetings. The second CEO has fundamentally reimagined how decisions get made, how value gets created, and what their company is capable of achieving.

The difference? One CEO optimized for incremental gains, leaving the organization arrested in development. The other adopted a leadership mindset that transformed the operating model and achieved measurable competitive advantage through AI-Native capabilities.

As Leon Megginson, a prolific author and prominent teacher in management studies wrote in 1963: "According to Darwin's Origin of Species, it is not the most intellectual of the species that survives; it is not the strongest that survives; but the species that survives is the one that is able best to adapt and adjust to the changing environment in which it finds itself."[1]

Welcome to the era of AI Darwinism, where survival belongs not to those who deploy the most AI tools, but to those willing to ask the harder question: What becomes possible when we build with AI at the core, not as an add-on to yesterday's models?

AI Darwinism describes the environment. Culture describes your fitness within it. You can't control the selection pressure, but you can evolve your organization to survive it. And it begins with understanding your culture and where it's taking you.

According to a 2025 IBM-Oracle agentic AI study, 78% of C-suite executives recognized that maximum AI benefit requires a new operating model, yet more than three-quarters admitted their current investment focused on improving existing processes rather than net-new capabilities.[5]

Why most AI projects go extinct

When MIT research revealed that 95% of generative AI pilots failed to create meaningful revenue acceleration,[2] the market had concluded AI wasn't ready. But a major cause of the failure was not the technology itself, but that companies were optimizing yesterday's business model instead of inventing tomorrow's operating system. As the MIT report put it bluntly, for the 95%, there is "high

adoption, low transformation"[3] and a bias toward "directing resources toward visible but often less transformative use cases, while the highest-ROI opportunities in back-office functions remain underfunded."[4] According to a 2025 IBM-Oracle agentic AI study, 78% of C-suite executives recognized that maximum AI benefit requires a new operating model, yet more than three-quarters admitted their current investment focused on improving existing processes rather than net-new capabilities.[5]

This is the AI paradox: Companies know they need or aspire to achieve business reinvention, but they're largely funding AI iteration and optimization.

The businesses escaping this trap embody the AI Mindset, asking "what if" before "how," rethinking rather than optimizing, and measuring transformation over efficiency. AI leaders do ask practical questions, such as how to make their call centers more efficient, while asking *what if* customer service became a predictive, proactive relationship engine. In addition to using AI to optimize supply chains, they're reimagining what supply chains could be when every node can make autonomous, intelligent decisions in real time.

These AI innovators understand that while agentic AI systems make an increasing number of decisions, humans will make the choices that matter most. This fortifies human agency and expertise while agents scale tasks toward net-new capabilities and outcomes.

Over time, a performance gap emerges, likely to widen rapidly and set the stage for agentic Darwinism, in which only the fittest and most innovative enterprises survive.

According to the same IBM-Oracle report, "by 2027, twice as many executives expect AI agents will make autonomous decisions in processes and workflows compared to today."[6] If AI agents do take on autonomous decision-making at that scale, it will "represent a fundamental change in the DNA of business."[7] By 2030, fully autonomous robotic systems with embodied AI will be operational realities across industries. That means surviving will demand entirely new business models that scale autonomous decision-making capabilities. And the one thing shared by the fittest enterprises that evolve and thrive will be AI culture.

Four distinct AI cultures, four survival odds

While studying where to place his bets on behalf of Blitzscaling Ventures, AI investor and venture capitalist Jeremiah Owyang discovered that businesses weren't just at different stages of AI strategy and adoption. Through extensive research with executives, entrepreneurs, and innovators across Silicon Valley and beyond, he observed that organizations held fundamentally different beliefs about what AI could and should do.[8] These diverging beliefs clustered into four distinct cultures, each representing a level of technological sophistication and a leadership mindset that defines organizational identity.

AI-Follower businesses wait for best practices and proven ROI before adopting. They treat AI as vendor-provided tooling, prioritizing stability and compliance over speed and innovation.

AI-Forward organizations integrate AI alongside humans, using the term deliberately "to avoid scaring employees," as one executive explained. They're moving but carefully managing the cultural transition.

AI-First companies seek to lead with AI. They've employed a three-step decision framework: 1) adopt an existing AI tool, 2) build or vibe-code if it doesn't exist, and 3) hire a human if and only if that doesn't work. Repeat that process until the organization becomes lean and productive.

AI-Native startups are built with AI from inception, born in the era of generative AI. For these young, small companies, AI isn't a feature or strategy, but a foundation for organization and operation. They simply would not exist without AI. Legacy companies can also deliberately transform and reimagine core functions and operations to model an AI-Native approach. They could answer the question, *"If we had to start over with AI at the core, what would this workflow, model, or business look like?"*

To be AI-Native is to redesign from first principles, with AI embedded at the center of value creation, decision-making, and execution. It means moving beyond bolting AI onto legacy systems and instead reinventing products, processes, roles, and experiences so the organization can learn, adapt, and scale in fundamentally new ways.

These four cultures represent distinct approaches to intelligent operations. While most legacy organizations may still be AI Follower or Forward, what matters is diagnosing where they are and understanding how and why to evolve. This evolution happens when leaders recognize that culture, not technology, determines which organizations adapt and which stall.

> **You can have the most sophisticated models, the biggest GPU clusters, and the best data scientists, and still not evolve if your culture treats AI as a tool rather than an evolved transformation.**

Why culture determines who survives

Before we can talk about AI transformation or business reinvention, we need to understand what culture is. Defined as a pattern of shared basic assumptions to solve problems,[9] an operating system of an organization,[10] or simply "the way things get done around here,"[11] organizational culture shapes everything in a company. It determines which questions get asked, which risks get taken, which innovations get funded, and which transformations get attempted. Today, your organization's culture around AI is the invisible force that either accelerates or prevents the change you need.

You can have the most sophisticated models, the biggest GPU clusters, and the best data scientists, and still not evolve if your culture treats AI as a tool rather than an evolved transformation. You can start with basic automation and limited technical capabilities, but if your culture asks "what if" rather than "how," and you cultivate an AI mindset, you can evolve step by step over time.

Progress comes down to a leadership mindset. For example, consider AI's role in customer service. AI Followers might wait for successful use cases from other companies they can adopt, losing ground to companies driving more progressive AI cultures.

Meanwhile, an AI Forward organization might ask: "How do we use AI to make our call center more efficient?" and augment support agents. This is representative of iteration and optimization.

An AI-First culture might consider: "What if customer service became a predictive relationship engine that prevents problems?" and handle most support with minimal human intervention. This is transformational thinking.

AI Natives, on the other hand, won't ask questions about customer service at all. They'll build products that deliver the outcomes customers want, with AI-powered predictive service loops baked in, making traditional support models obsolete.

Culture shapes which questions you ask. Questions determine which answers you pursue. Answers, in turn, become outcomes that determine which companies survive. The right strategic framework can intentionally move an organization across that spectrum. It requires a deliberate balance of iterative and transformative investment.

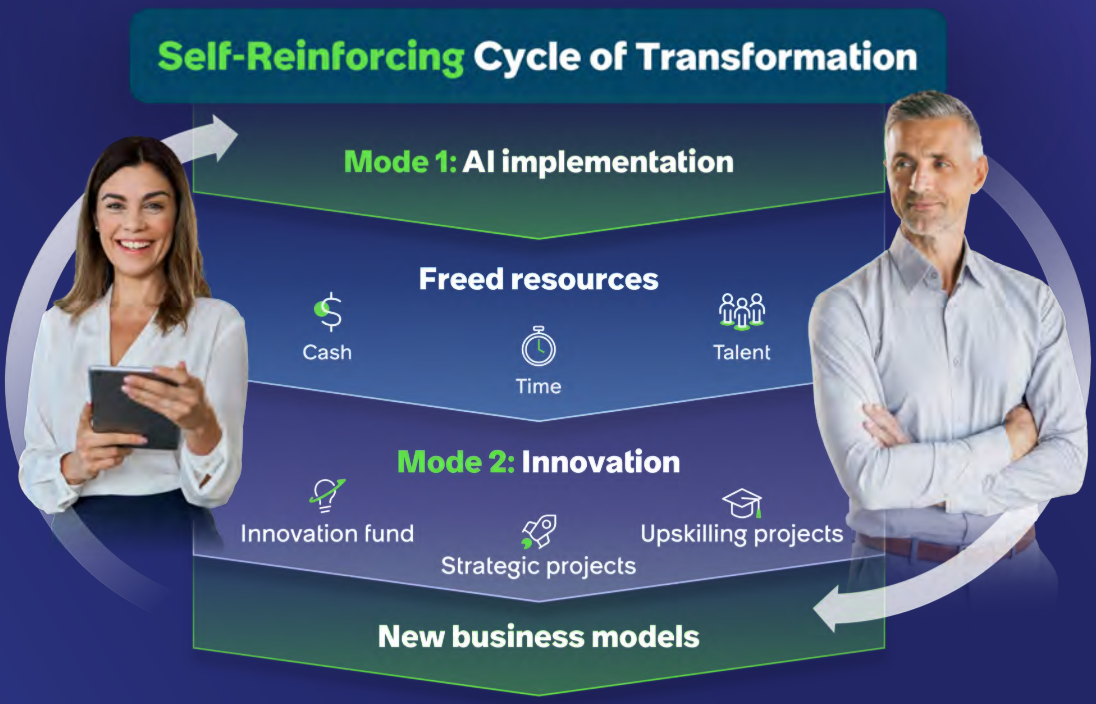
The bimodal solution: how evolution happens

Gartner®[12] originated the idea of bimodal in 2014 to describe two coherent but distinct styles of work: Mode 1, focused on predictability and exploiting what is known; Mode 2, exploratory and optimized for uncertainty.[13] Both are essential. The aim is to align the steady evolution of existing products and technologies with the pursuit of what's new.

> **The ones that escape build a self-reinforcing flywheel: Efficiency gains support innovation, which creates competitive advantages, which invite further investment.**

In 2025, Dave Wright, ServiceNow's Chief Innovation Officer, adapted the idea for the AI era, framing bimodal AI as a two-stage rocket.[14] Mode 1 provides the thrust to escape gravity: cutting costs, eliminating manual work, and delivering the immediate wins that satisfy CFOs. Mode 2 launches you into orbit, redeploying those freed resources into innovation, new business models, and revenue growth. The magic happens when you run both simultaneously: Mode 1 doesn't just reduce costs but also funds Mode 2 transformation.

Most companies get trapped optimizing for short-term efficiency while sacrificing long-term transformation. The ones that escape build a self-reinforcing flywheel: Efficiency gains support innovation, which creates competitive advantages, which invite further investment. Your AI culture determines which mode you emphasize. Survival requires both.



This approach can be adapted into two distinct mindsets that operate simultaneously.

Mode 1: Optimized AI strategy

IKEA deployed its AI Billie bot to handle 47% of customer inquiries—classic Mode 1 optimization. But rather than cutting headcount, IKEA upskilled 8,500 call center workers as remote interior designers, introducing design consulting as a new revenue stream projected to reach 10% of total sales by 2028. Sales through that channel already account for 1.3 billion euros ($1.40 billion), or 3.3% of total revenue.[15] That's Mode 1 funding Mode 2.

This optimized AI strategy solves real business challenges and improves everyday workflows by removing routine work and enabling faster, more efficient, and more productive, value-added work.

Mode 2: Innovative AI strategy

Mode 2 focuses on increasing top-line revenue through new business models, which carry higher risks and a longer horizon. But leaders understand that not experimenting carries even greater costs and risks of growing irrelevant. Success metrics include revenue growth, innovation rate, new market penetration, and customer experience transformation.

Mode 2 creates entirely new products, services, or business models, uncovering opportunities that were previously impossible or impractical, and leading to exponential growth and competitive differentiation.

The magic happens when Mode 1 fuels Mode 2. By strategically directing a percentage of the saved cash, resources, and talent toward innovation, organizations mastering bimodal AI enable space for exploration and experimentation. This creates a flywheel where efficiency gains support transformation, leading to competitive advantages that invite further investment.

BCG research tracking 1,000 organizations shows AI leaders achieve 1.5x higher revenue growth, 1.6x greater shareholder returns, and 1.4x higher returns on invested capital compared to peers focused on single-mode implementations.[16] What separates them: strategic intentionality, infrastructure before algorithms, and disciplined execution of both modes simultaneously.

Revisiting the IBM and Oracle research, we see organizations split between the process-focused (proficient at optimization but stuck in Mode 1) and the transformation-driven (running both modes simultaneously).

Real-life examples demonstrate that transformation-driven organizations perform measurably better across key business metrics, including productivity, efficiency, revenue growth, brand perception, R&D ROI, customer loyalty, and employee sentiment.

JPMorgan Chase has deployed AI across 450 potential use cases, generating nearly $1.5 billion in savings through fraud prevention, trading efficiencies, and operational improvements. But the bank didn't stop at optimization. Coach AI, their Mode 2 play, enables private client advisors to find information 95% faster, freeing them to focus on client relationships rather than research, leading to a 20% increase in wealth management gross sales, with a 3–5-year forecast of expanding client rosters by 50%.[17]

DBS Bank has deployed over 800 AI models across 350 use cases, expecting SGD 1 billion in impact by the end of 2025, balancing core banking automation with hyper-personalized services and employee upskilling roadmaps.[18]

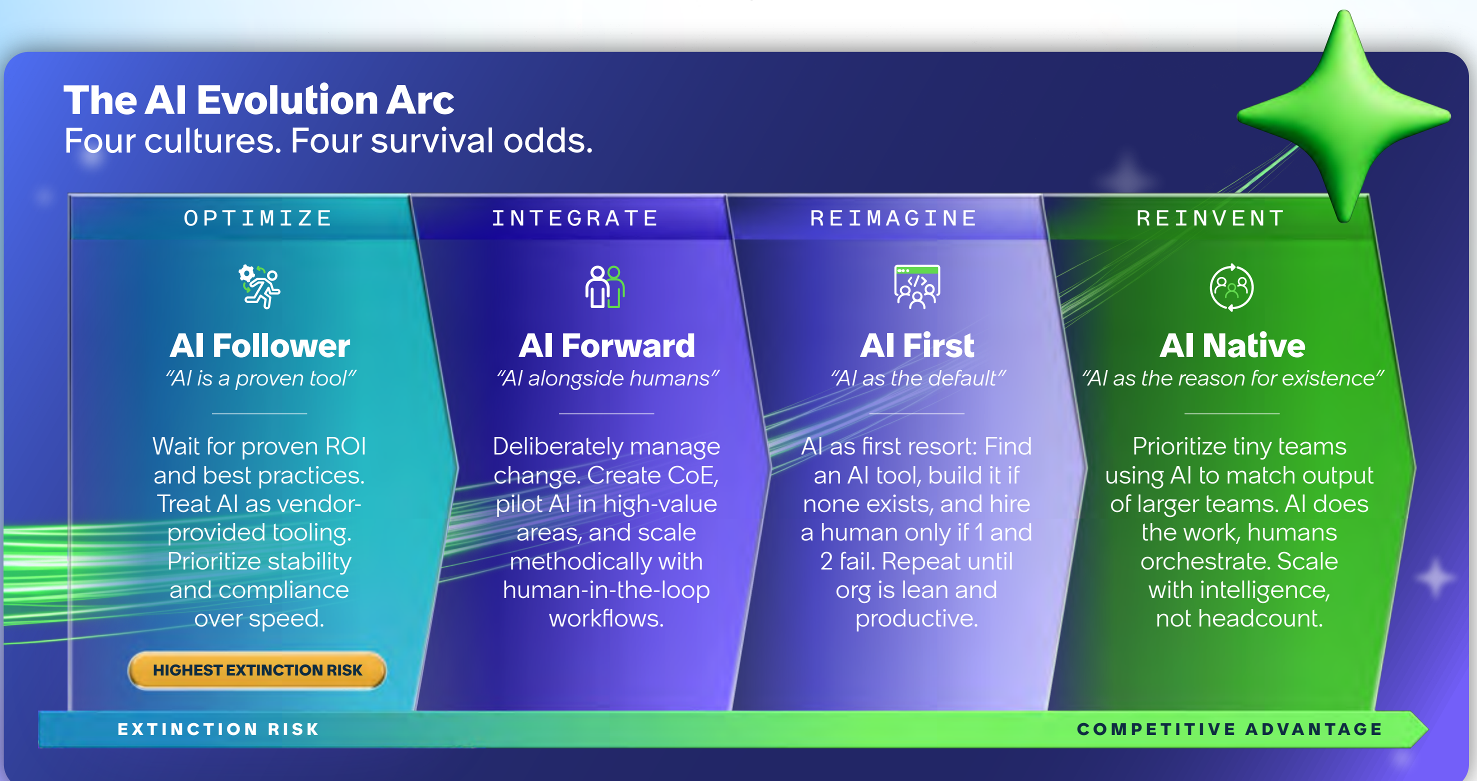
ServiceNow's internal transformation demonstrates bimodal at the departmental level. While customer service case volume was up 40% over two years, using self-service AI, the company kept the same headcount and increased customer satisfaction. ServiceNow redeployed the freed resources into AI-powered sales enablement tools.[19]

A bimodal strategy explains how organizations move. The AI Evolution Arc below shows where they're headed.

The AI Evolution Arc

The arc maps the journey from Follower to Forward to First to Native—or in corresponding operational terms, from Optimize to Integrate to Reimagine to Reinvent.

The window is closing faster than most executives realize. AI adoption jumped from 55% to 78% in just 12 months, according to the IBM-Oracle study on agentic transformation. Today, 24% of executives say AI agents take independent action in their organization. By 2027, 67% expect that to be the case.[20] These statistics signal which organizations will thrive and which face extinction as they navigate evolving AI cultures. Against this backdrop of accelerating change, understanding where you stand on the AI Evolution Arc becomes critical for charting the path forward.



AI Follower: Optimize mode

At the beginning of the arc sit AI Followers, organizations waiting for best practices and proven ROI before adopting, treating AI as vendor-provided tooling while prioritizing stability over speed. They're making a calculated bet that the risks of early adoption outweigh first-mover advantages.

When Followers deploy AI, they optimize existing processes rather than reimagine them: making call centers more efficient without questioning whether call centers are the right model, accelerating invoice processing without reimagining automated commerce. AI initiatives begin with extensive business cases, legal reviews, and compliance assessments. The process is thorough, methodical, and risk-averse.

The language of Optimize Mode reflects a worldview in which boundaries are known, rules are established, and success comes from playing the existing game better: "incremental improvement," "best practices," "proven solutions," and "industry standards." These companies aren't asking transformational questions; instead, they're using AI to perfect yesterday's processes.

AI Forward: Integrate mode

AI-Forward organizations deliberately manage the cultural change as they integrate AI alongside humans. They're moving forward carefully, balancing Mode 1 and Mode 2, carrying their people with them. The bimodal strategy starts generating real momentum.

AI-Forward companies run structured transformation programs. They create centers of excellence, pilot AI in high-value areas where success builds confidence, document learnings systematically, and scale methodically. When they deploy AI, they emphasize augmentation over automation, framing AI as empowering employees to do higher-value work. They build "human-in-the-loop" workflows where AI proposes, humans decide, and both learn.

Forward companies understand that technology adoption without cultural change stalls progress. They invest as heavily in change management as in deployment. The language emphasizes partnership: "human-AI collaboration," "augmented intelligence," "AI assisting workers," and "keeping humans in the loop." These phrases reflect a mindset where humans remain central, and AI supports.

AI First: Reimagine mode

Midway along the arc, AI-First organizations have inverted the assumption about who—or what—does the work. AI is the default; humans provide judgment, creativity, and strategic oversight.

AI-First companies have adopted what Owyang calls the "AI-First Method," a three-step decision framework: 1) facing a challenge, see if an AI tool already exists instead of defaulting to hiring, training, or improving process; 2) if the tool doesn't exist, build it using no-code platforms, prompt engineering, and vibe-code; 3) if, and only if, that doesn't work, hire a human. Then repeat until the organization becomes lean and productive.

When AI-First companies approach customer service, they don't ask "How can AI help our agents be more efficient?" They ask, "What if AI handled 95% of customer interactions autonomously, and humans focused exclusively on the 5% requiring empathy, judgment, or creative problem-solving?" Instead of asking how AI can accelerate development cycles in product development, they imagine what would be possible if AI generated the code, and engineers focused on architecture, validation, and innovation.

AI Native: Reinvent mode

At the peak of the arc sits AI-Native organizations, for whom AI isn't a strategy or a feature. AI is the reason for existence. For now, they are almost exclusively startups founded during the generative AI era, but legacy companies can deliberately rebuild core functions to approach the same economics.

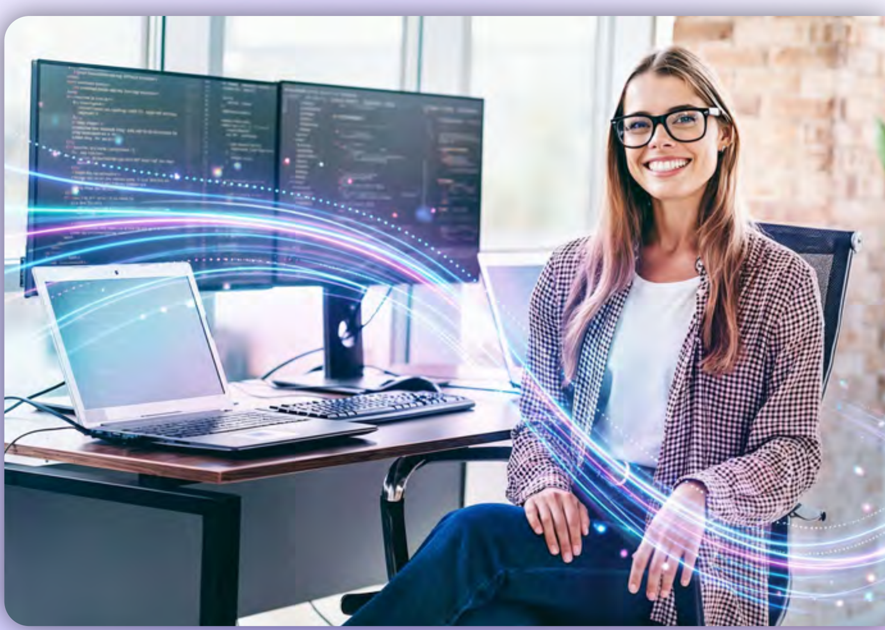
AI Natives prioritize "tiny teams," or ultra-lean groups using AI tools to achieve output that would require exponentially larger traditional teams.[21] These organizations scale with technology, not people.[22] Midjourney reached an estimated $200M ARR in two years with just 10 employees. Cursor, an AI coding assistant, scaled to $100M ARR with 20 people, then $200M months later.[23] ElevenLabs hit $100M ARR with 50 people.[24]

The governing metric is revenue per employee (RPE), which reveals whether an organization has truly transformed how value gets created. While traditional companies measure

> **Where you stand on the Evolution Arc today, and where you aspire to be tomorrow, determines whether you're shaping your market or reacting to it.**

productivity through headcount ratios and hours worked—metrics that assume humans are the primary value creators—AI Natives design organizations where AI handles most operational work, and humans focus exclusively on strategy, judgment, and orchestration. RPE becomes a clear indication of evolution from human-centric to intelligence-centric operations.

In May 2025, Owyang found that the top 10 AI-Native companies have an RPE of $3.48M.[25] If traditional companies have humans doing work supported by technology, AI-Native companies have AI doing work orchestrated by humans. The ratio is inverted; the leverage becomes exponential.



But AI-Native economics aren't reserved for startups. Legacy companies can adopt the same mindset. Palantir, a SaaS data integration platform founded in 2003, made headlines when CEO Alex Karp announced the company would grow revenue tenfold while reducing headcount from 4,100 to 3,600.[26] That's a legacy company explicitly targeting AI-Native RPE.

ServiceNow is deliberately transforming into an AI-Native company, using its own platform to do so. They published a blueprint for making the company customer zero for its own transformation. "ServiceNow is becoming an AI-native enterprise," meaning, AI is "embedded into every product, every feature, every interaction with the platform."[27] The test: AI that is "[n]ot bolted on. AI built in."[28] This means AI is not applied as an afterthought, as President, Chief Product Officer, and Chief Operating Officer Amit Zavery explains, but rather a foundational element baked into the company's DNA.[29]

Companies that underestimate AI-Native competitors risk waiting until disruption arrives faster than they can respond. Organizations that assess core functions through first principles—keeping what works with AI, rebuilding what doesn't—create the conditions to compete. Where you stand on the Evolution Arc today, and where you aspire to be tomorrow, determines whether you're shaping your market or reacting to it.

Survival of the fittest: thriving against natural selection

Picture those two CEOs from the beginning. One optimized their way to incremental gains and arrested development. The other rebuilt the operating model and achieved a measurable competitive advantage. The difference wasn't technology. It was diagnosing where they stood, questioning what that position demanded, and transforming the culture to meet it.

The companies that thrive won't be those that deployed the most AI tools. They will be those who rebuilt their operating models while others were still writing business cases.

Your culture determines your fitness in the face of agentic Darwinism. The bimodal strategy is how you evolve it. And the choice to move—deliberately, function by function, from optimizing what exists to building what couldn't exist before—determines whether you're still competing when the disruption arrives. The window is closing. The companies that thrive won't be those that deployed the most AI tools. They will be those who rebuilt their operating models while others were still writing business cases.

Darwin was right about evolution. But in the agentic era, adaptation is a choice.

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Our forward-looking research, thought leadership, and platform builds serve as the blueprint for AI-first business reinvention. We help our colleagues and customers see further so they can act sooner.

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