



Weekly Brief

July 22, 2025

AI-First Companies Are About to Start Competing in Your Industry

AI is no longer an enhancement or add-on. Companies putting AI at their core—becoming [“AI-first”](#)—are setting new standards for performance, productivity, and profitability. They are reimagining how to organize work, develop talent, and create strategic differentiation.

Companies such as Cursor and Klarna demonstrate vividly what an AI-first approach can achieve. Cursor, whose AI-powered code editor lets you code in plain English, reached \$100 million annual recurring revenue in just two years with fewer than 20 employees. Klarna, a Swedish fintech, has improved revenue per full-time employee by 73%.

There are admittedly few truly AI-first companies today, but they represent the future—and your future competition. An AI-first company places AI at its central nervous system and builds out the organization from that core. At these companies, AI agents have moved out of the lab and are making and executing decisions in the field. Humans are collaborating with AI by exercising their judgment, intuition, sensibilities, and veto power when necessary.

Most traditional companies are more AI-curious than AI-first. They’re [running pilots, improving back-office processes, and experimenting with AI agents](#). But these efforts are layered on top of old ways of working.

For traditional companies, the transformation to AI-first demands significant shifts:

- **Reshaped Workflows.** Operations are streamlined through reusable AI workflows, minimizing redundancy.
- **Specialized Talent Structure.** Smaller, elite teams focus on strategy, judgment, and seamless human-AI collaboration. AI-first companies will likely spend far less in total on people, but far more on a per-employee basis.
- **Decentralized Technology Framework.** Business units tap into enterprise-wide AI platforms, enabling swift and tailored solutions.
- **Strategically Aligned P&L.** Dramatically increased technology investment shifts the strategic role of tech spending from support to growth driver.
- **Redefined Competitive Advantages.** Brand trust, direct customer relationships, exclusive data sets, and top AI talent become critical.

It is easier to start as an AI-first company than to become one. But this transition is critical, as it was for manufacturing companies migrating from steam to electrical power.

Here are practical ways to start:

- **Develop a business-led AI agenda.** Define tangible priority outcomes from AI, and ensure that business leaders take ownership.
- **Embrace AI in your daily work.** Use a range of AI tools to increase your proficiency, and lead by example in your teams.
- **Anticipate the impact on your workforce.** Identify where and how roles will shift, and develop a strategy to upskill teams so they can work effectively with AI.
- **Show impact and scale.** Focus on a few high-value initiatives to demonstrate measurable impact and the ability to scale.

- **Fund what works.** Allocate resources to the promising early wins, and build a plan to budget for AI investments that deliver value.

Winning companies will reshape their operating models, workforces, and ways of thinking, and they are starting now.

Until next time,



Christoph Schweizer
Chief Executive Officer

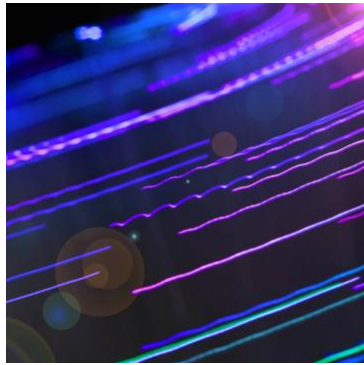
Further Insights



[How to Prepare for an AI-First Future](#)

AI-first companies are rewriting the playbook for all organizations by generating tens of millions of dollars in annual revenue with just a few dozen employees.

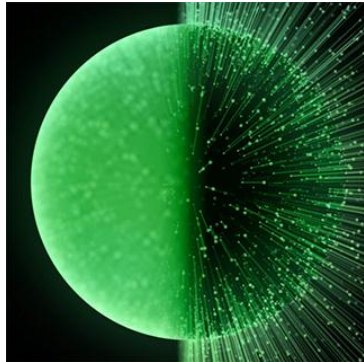
ACT ON THE ADVANTAGE



Exactly What Is an AI-First Company?

Being an AI-first organization is a fundamentally different way of organizing people, resources, and decisions around the capabilities of artificial intelligence.

Redefine How You Work



AI-First Consumer Products Companies Win the Future

AI can give consumer products companies a strong new set of tools in, for example, product development, operations, and marketing.

STAY AHEAD OF THE CURVE