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This presentation looks at AI less as a standalone technology programme and more as a change to the operating system of a company. The central question is how intelligence changes the way a fast-growing organisation works - and how much additional ambition that organisation can absorb without complexity growing at the same rate.



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Entering a new sport is a useful stress test because the external moment looks simple while the internal coordination is not. Product creation, athlete insight, manufacturing, supply, commerce, content, customer service, data and technology all have to move together. The point is not that AI delivered the launch; it is that new ambition exposes the quality of the company underneath it.

How much ambition can our operating system absorb?

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By 'operating system' I mean the combination of information, systems, rules, decisions and people that allows the company to turn intent into action. The question is whether each new market, sport or channel creates another layer of workarounds, or whether the organisation has built enough reusable capability to absorb the next ambition more easily.

Ambition compounds.
So does complexity.

A broader company on the outside needs a simpler company underneath.

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Complexity is rarely created deliberately. It accumulates through individually sensible local decisions: another tool, process, spreadsheet or copy of context. Over time the integration cost between those choices becomes material, which is why a broader company on the outside needs a simpler company underneath.



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Many organisational processes were designed when information was difficult to assemble and coordination was expensive. Meetings, handoffs, reporting layers and reconciliation often compensated for those constraints. AI changes the cost of bringing context together, which means some of the workarounds built around the old constraint deserve to be reconsidered rather than simply automated.

Expression

Where intelligence shows up

Products, experiences, interfaces, agents

Structure

How the company works

Policies, logic, authority, workflows

Truth

What the company knows

Data, context, history, decisions

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A useful way to think about an AI-native company is through three layers. Truth is what the company knows: data, context, history and decisions. Structure is how the company works: policies, logic, workflows and authority. Expression is where intelligence becomes visible through products, experiences, interfaces and agents.

Truth precedes structure.
Structure enables expression.

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The relationship between the layers matters more than the labels. Reliable expression depends on clear structure, and clear structure depends on trusted context underneath it. AI makes the visible layer dramatically easier to create, which increases rather than reduces the importance of the foundations below.

Most companies don’t have an AI problem. They have a foundations problem.



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AI often acts as a diagnostic before it acts as a solution. It quickly exposes fragmented data, broken handoffs, inaccessible context and unclear decision rights. A better model cannot compensate for information the system cannot reach or authority the organisation has never defined.

AWS to Google Cloud

75%+
of infrastructure now on Google Cloud

3
months for the bulk of the migration

0
incremental headcount

AI changed the economics of what our team could attempt.

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The cloud migration is an example of AI changing the economics of execution. By combining an explicit simplification decision with agent-supported engineering, the existing team was able to take on a programme that would traditionally have required a much longer migration and more external capacity. The important lesson is not the technology itself, but that the size of problem a team can reasonably attempt has changed.



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The more important opportunity is not to add AI to every existing step. It is to start from the end-to-end decision loop: what should we sense, understand, decide, act on and learn from? Beginning with the current software or org chart usually reproduces the current process; beginning with the decision creates room to redesign the work.

Reconciliation shouldn’t be a job.

It should be a property of the system.

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Planning makes the distinction concrete. Highly capable people can spend large amounts of time gathering, reformatting and reconciling information before they reach the point where judgement is actually required. The ambition is for the system to keep context reconciled continuously and bring changes and exceptions to people, so reconciliation becomes a property of the system rather than somebody's job.

The value sits between the boxes.

Product | Supply | Commerce | Marketing | Customer

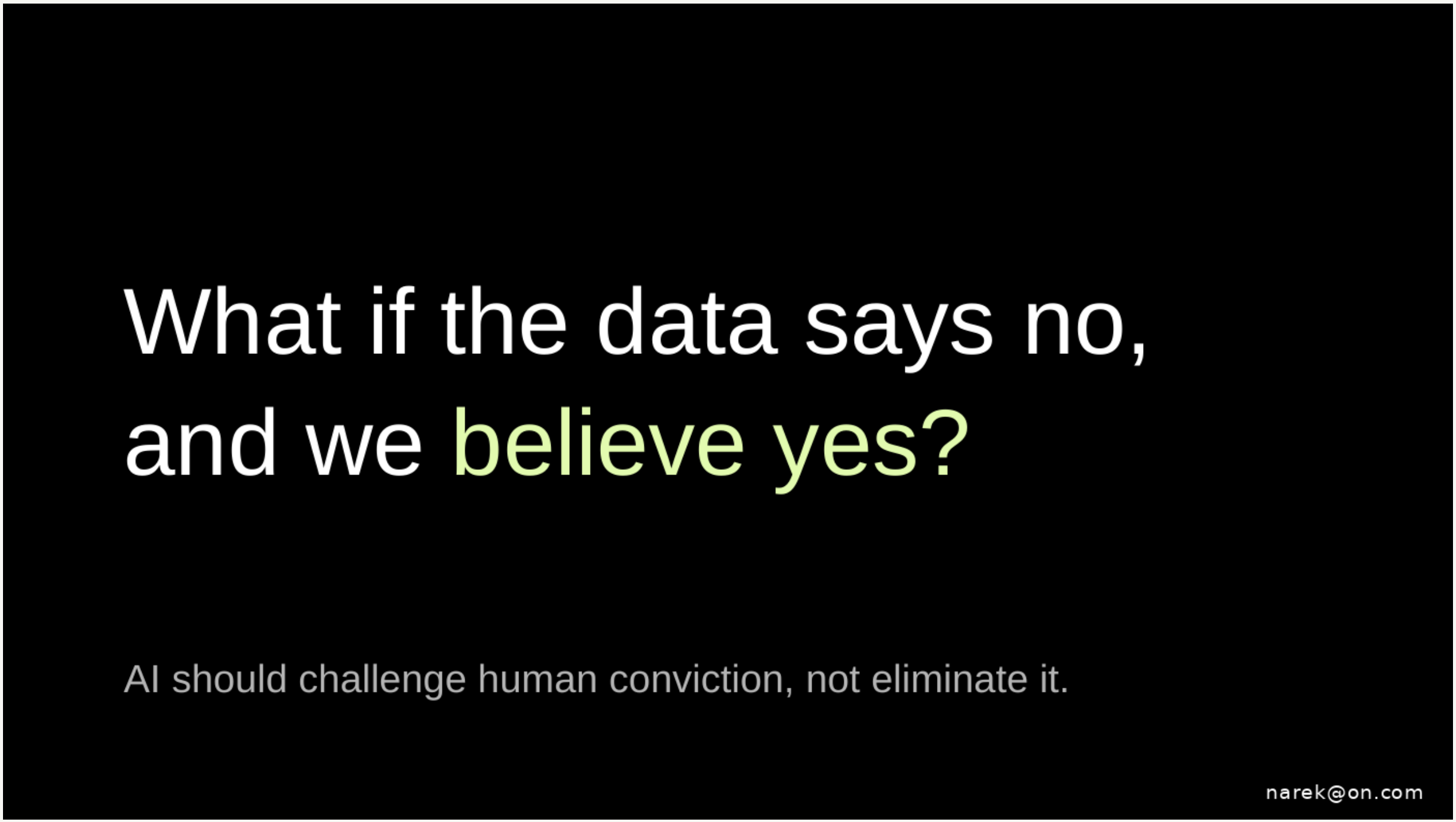
Shared context. Continuous learning.

The ambition is a more intelligent company.

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Many of the largest opportunities sit between functions rather than inside them. Product, supply, commerce, marketing and customer experience all influence one another, but organisational ownership is usually vertical. A more intelligent company needs shared context to travel across those seams so that a decision in one place retains its meaning in the next.



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Data should not become a machine for eliminating conviction. New products and ideas often have weak historical signals precisely because they are new. AI can challenge a belief by making the hypothesis, evidence and conditions explicit, but great companies still need people willing to make accountable bets where the evidence is incomplete.

The difference is not intelligence.
It’s authority.

Assist Recommend Decide Act

The risk begins when trust outruns verification.

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The critical governance distinction is not whether a system uses AI, but how much authority it has. Assistance, recommendation, decision and action carry very different consequences. As authority increases, permissions, evaluation, monitoring, auditability, reversibility and clear human accountability need to increase with it.



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The hardest part of redesign is often ownership. Technology can provide common capability, but it cannot decide how Planning, GTM, Finance or another business domain should operate on behalf of the people who understand its trade-offs. The biggest opportunities often live in the seams, which means leadership has to make ownership explicit where the org chart does not provide a natural answer.

The scarce resource
isn’t information.

It’s judgement.

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As AI lowers the cost of gathering context and producing options, judgement becomes more valuable, not less. The scarce skill moves toward deciding what matters, which trade-off to make, what should exist and who is accountable for the consequence. The aim is to spend less human capacity on assembly and more on decisions that genuinely require judgement.

AI-native companies have to remember differently.

What did we know?

What did we believe?

What did we decide?

Why?

What happened?

Eventually the organisation doesn't just accumulate data.

It accumulates judgement.

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AI-native organisations also need a richer form of memory. Companies are good at preserving the final number or approved plan, but less consistent at preserving what was known, what was believed, why a decision was made and what would have changed it. Capturing that context allows the organisation to accumulate judgement, not just data, and to learn more deliberately from past decisions.



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The closing test is whether growth in ambition still requires growth in complexity at the same rate. Traditional measures of scale - traffic, transactions, markets - still matter, but there is another useful measure: did the last difficult thing leave the organisation more capable of doing the next one? That is the difference between simply scaling output and compounding capability.

Strong truth underneath.

Clear structure in the middle.

Freedom at the edge.

That is what I think an AI-native company looks like.

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The final idea is deliberately simple: strong truth underneath, clear structure in the middle and freedom at the edge. The goal is not a company with more AI everywhere; it is a company that can express more creativity and ambition because the foundations and decision structures underneath are increasingly coherent, reusable and trustworthy.