The Transformation Brief

Issue 11
19 June 2026

Lead signal

Technology was never the hard part.

The 2026 verdict from the big houses, ten percent technology, seventy percent people.

Lead signal

PwC published its Global AI Jobs Barometer on Monday, and the job market is dividing, the side that pays rewards judgement, creativity and leadership, not the people who are fastest with the tools.

BCG has been making a version of this point all year. Its split is **ten percent technology, twenty percent process, seventy percent people**, and the firms seeing real returns spend roughly in that proportion. Most do not. Deloitte lands close to the same place, about a third of companies are using AI to genuinely change what they do, and the rest have attached a model to the same old work and called it transformation.

The technology	The people and process
Ten percent of the value	Seventy percent of the value

None of this is a technology problem. You can buy every model on the market and the hard part stays where it always was, in how the work is organised and whether people can do it differently, and no procurement cycle reaches that.

From my office, I spend my time on the seventy percent, the slow, unglamorous part where the money usually is. The AI BVF and the Workflow Coroner exist to ask one thing before a model goes near a workflow, whether that work should stay as it is, be redesigned, or be stopped. Most programmes never ask it, they start with the model and reverse-engineer a use case to justify it.

Sources PwC, 2026 Global AI Jobs Barometer, 15 June 2026. · BCG AI Radar 2026. · Deloitte, State of AI in the Enterprise 2026.

On the radar

Three signals from the week.

The redesign is the work, not the tooling.

Deloitte · 1 June 2026

Big 4

firm reorganising its own people around AI

Deloitte began dropping traditional job titles this month and reorganising its people around AI work. A Big Four firm doing that to itself is worth more than the roadmaps it sells, because reorganising the work is the part most of its clients keep putting off.

Prosci · 2026

13%

of US workers got any employer AI training

Thirteen percent of US workers received any AI training from their employer this year, even as access spread, and Prosci puts about sixty-three percent of AI failures down to people rather than technology. Access keeps rising, readiness does not, and the spend still goes to licences.

ASML and Terafab · 11 June 2026

$55bn

Musk's move into chip-making

Musk used an ASML event to push Terafab, his fifty-five billion dollar move into chip-making. ASML still builds the only machines that can make those chips, which leaves the whole industry leaning on one company in the Netherlands.

Sources Deloitte job-title restructuring, effective 1 June 2026. · Prosci AI change-management research, 2026. · CNBC, Musk and ASML, 11 June 2026.

Against the grain

> The adoption numbers look strong, four in five employees now use the tools. That is not transformation. Most of it is people doing the same tasks a little faster.
>
> Accenture and the Big Four will happily sell you the redesign, but the redesign itself has to be run from inside, by someone who owns the strategy and has to live with the people it lands on.

The reframing question

If seventy percent of the return comes from people and process, why does seventy percent of the budget still go to the technology?

What's next

Issue 12 lands Friday 26 June 2026. The CEO now owns the AI decision in most companies, and nobody owns the redesign of the actual work. That gap is next week.