Squinting in the Sun

A global study of what AI confidence is making harder to see.

monday.com Survey conducted by Nielsen

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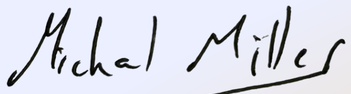
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For senior leaders, AI is no longer a pilot. It's a daily habit, and one they're excited about. We surveyed senior business leaders across the globe, and most see AI as an opportunity for their teams. They use it daily, they're excited about it, and they're confident in their own ability to put it to work.

But personal fluency is only part of the story. A leader's job is organizational performance, and an organization gets value from AI very differently than an individual does. Only 29% of leaders say their company has AI that is fully optimized and integrated into a central operating system. About half routinely mix company-approved tools with others. The tools are there, but the foundation under them is still being built.

At monday.com, we break that foundation down into three distinct parts: context, collaboration, and control. AI needs to know your organization to do good work. It needs to be shared, so people can see and build on what it does. And it needs to operate within limits you set, because the more it acts, the more those limits matter. The Expanding the View section in this report takes each of these in turn.

The leaders in this report aren't hesitant, and they shouldn't be. What ties these challenges together is structure, not eagerness. The work now is giving AI the context, collaboration, and control to deliver, so businesses can move faster with confidence.



Michal Miller Levi
Head of Market Research and Customer Insights

Introduction

AI is the brightest thing in the room right now. For the leaders in this report, it arrived as an opportunity: a new set of tools, a new edge, and a reason to be optimistic about what their teams can do. Together with Nielsen, monday.com surveyed 1,701 directors and senior managers across seven countries, and the picture they describe is a confident one. We then added two data sources of our own: an aggregated view of agents built and used across monday.com workspaces, and what more than 2,000 of our customers told us they want from AI. The light is bright, and everyone sees it.

However, any light this bright can create a glare, and leaders are being forced to squint as they move forward. Squinting narrows the field. Peripheral vision goes first. Then depth. Then the edges of the frame. The result is that critical elements of the AI adoption journey begin to wash out.

Leaders know AI is moving faster than the processes built to keep up with it, and they mention it repeatedly throughout this survey. This story is not about a lack of awareness, but about the things that are harder to see when someone is being forced to squint.

To meet this moment, leaders shouldn't look to dim the glare, but rather expand the view.

Executive Summary

Where the Glare Falls

Senior leaders feel ready for AI, with 94% excited and 83% confident they know where it adds value, but that brightness washes out what decides whether it works inside an organization. The glare falls hardest in three places.

The Infrastructure Glare

- **29%** have AI fully optimized & integrated into a central operating system
- **50%** use company-approved AI alongside other AI tools
- **57%** say their teams' software tool count has grown since adopting AI

The Attribution Glare

- **53%** say it's harder to evaluate employees' original contributions
- **78%** have changed how they evaluate team members since adopting AI
- **47%** spend more time reviewing & guiding team output

The Oversight Glare

- **58%** expect to manage more AI agents than people within 12 months
- **52%** worry about agents accessing data without sufficient restrictions
- **46%** worry about lack of human oversight or control

Personal fluency doesn't measure any of these glares, which is how confidence can stay high while they go unaddressed.

The Shine of AI at Work

Ask senior leaders how AI is going for them and the answer is bright.

96%
use AI at work, and 73% of those use it daily

94%
find AI optimization opportunities exciting

83%
are confident they know where AI can add value

82%
are satisfied using AI in their job

81%
feel they're keeping up with the AI landscape

This brightness has a cost. Squinting narrows the field, and what drops out of view first isn't the AI itself but the organizational questions around it: whether the infrastructure holds, who did the work (and whether that even matters), and who is responsible when an agent gets it wrong. Leaders aren't failing to look. The glares are forcing them to squint.

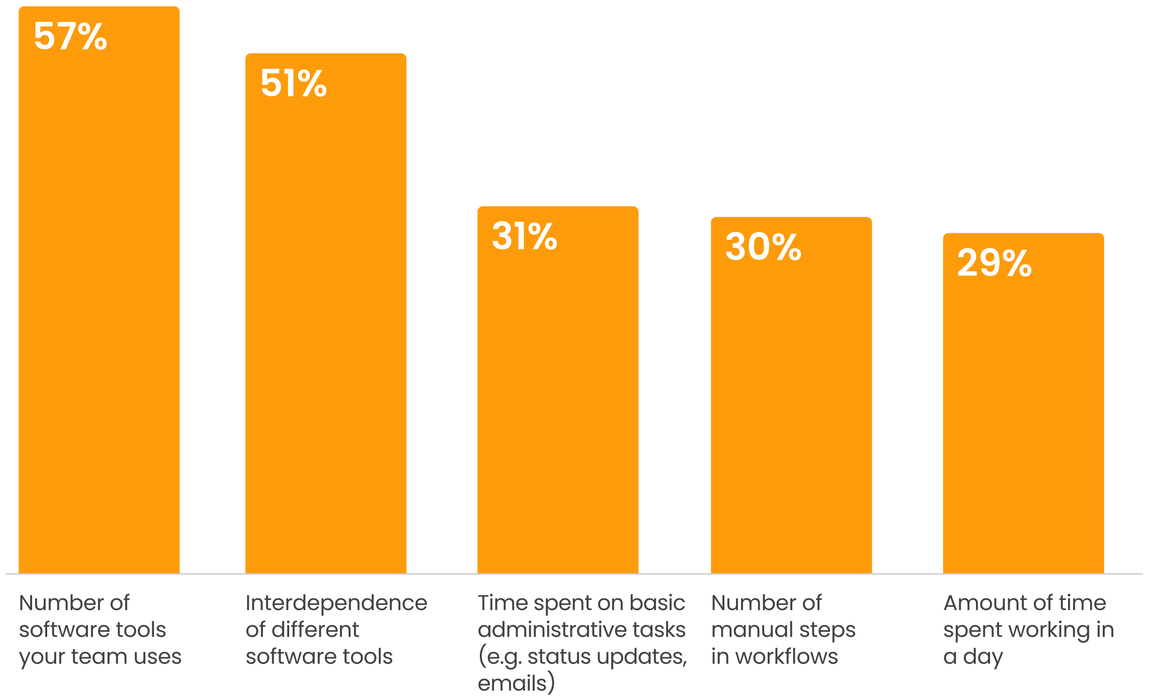
The Infrastructure Glare

Almost every organization in this study uses AI. A tool that's everywhere, in every team, in some form. But using AI and running a business on it are two very different things, and that gap is where most leaders are stuck squinting.

Sixty-one percent say AI is embedded into their common workflows and is now their primary system of work.

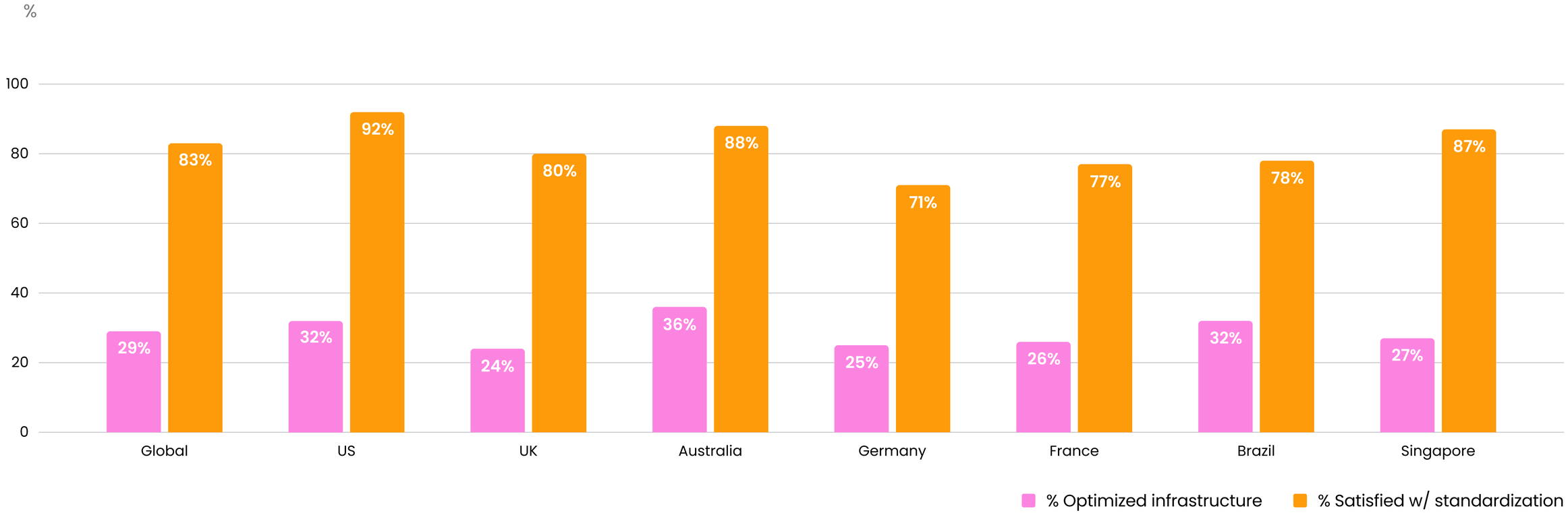
Yet underneath that 61% is a less clear picture. Fifty-seven percent report more software tools in circulation than before – not fewer, as automation was supposed to deliver. Fifty-one percent say those tools have become more interdependent, tangled into each other in ways that are hard to unwind, revealing that for many, AI hasn't been standardized. It's spreading tool by tool and team by team, until organizations depend on systems nobody has deliberately built.

AI Work Change (Significantly/Somewhat Increased)



In fact, only 29% of respondents have reached full "Optimized" status: one shared operating system, standard across every team. In the US, that figure is 32%. Despite 85% of US companies mandating or strongly encouraging AI use, ambition and architecture are running on different timelines.

Optimized Infrastructure and Satisfaction with Standardization, by country



The payoff for fixing that is not small. Organizations with centralized infrastructure report satisfaction rates roughly 3× higher than fragmented ones, demonstrating that it's not a nice-to-have. It's the difference between AI feeling like it's working and AI feeling like it's in the way.

Why governance and standardization stall

Only 17% of companies strictly mandate AI use. Fifty-five percent just "strongly encourage" it – real momentum, but no hard requirement, and no single standard for anyone to rally around. Fifty percent of leaders point to data privacy and security as the single biggest reason their AI stack isn't standardized.

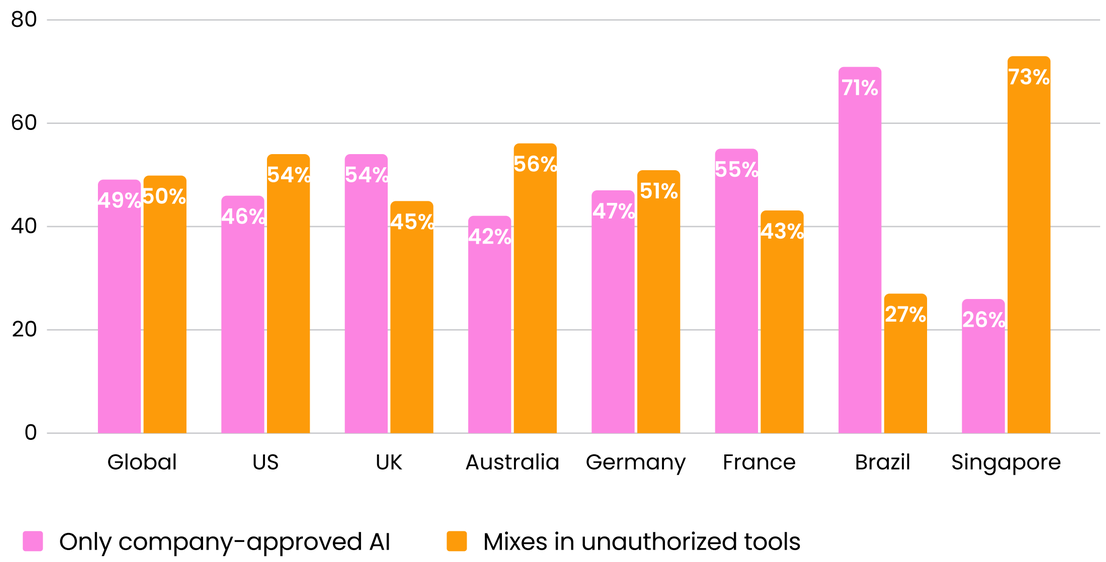
When governance lags, organizations improvise

As legal reviews and compliance checks pile up into a backlog, teams don't wait. They reach for whatever AI tools work. One in two managers surveyed say they mix approved tools with unauthorized ones just to get the work done. This improvisation under pressure means the exact risks the approval process exists to prevent – security gaps, data exposure, no oversight – show up informally anyway.

Some markets are improvising more heavily than others. In Singapore, nearly 3 in 4 leaders mix in unauthorized tools – the highest rate in the study – in a country where 36% of organizations consider AI optional or have no official AI policy at all, against a 28% global average. With shallow AI integrations, such as being under-indexed on agentic automation, Singapore's leaders report the greatest friction with AI, being the most likely to report an increase in working hours since its integration into their team's workflows. Sixty percent of them agree that frequently deciding where to use and not use AI is fatiguing – a problem that tends to follow when managers, not organizations, are left to lead its governance. In France, an estimated 17% do not have a list of approved AI software in their company, the highest in the study, and French leaders are the least likely to use AI daily.

Company-Approved vs. Mixed AI Use, by country

% of leaders



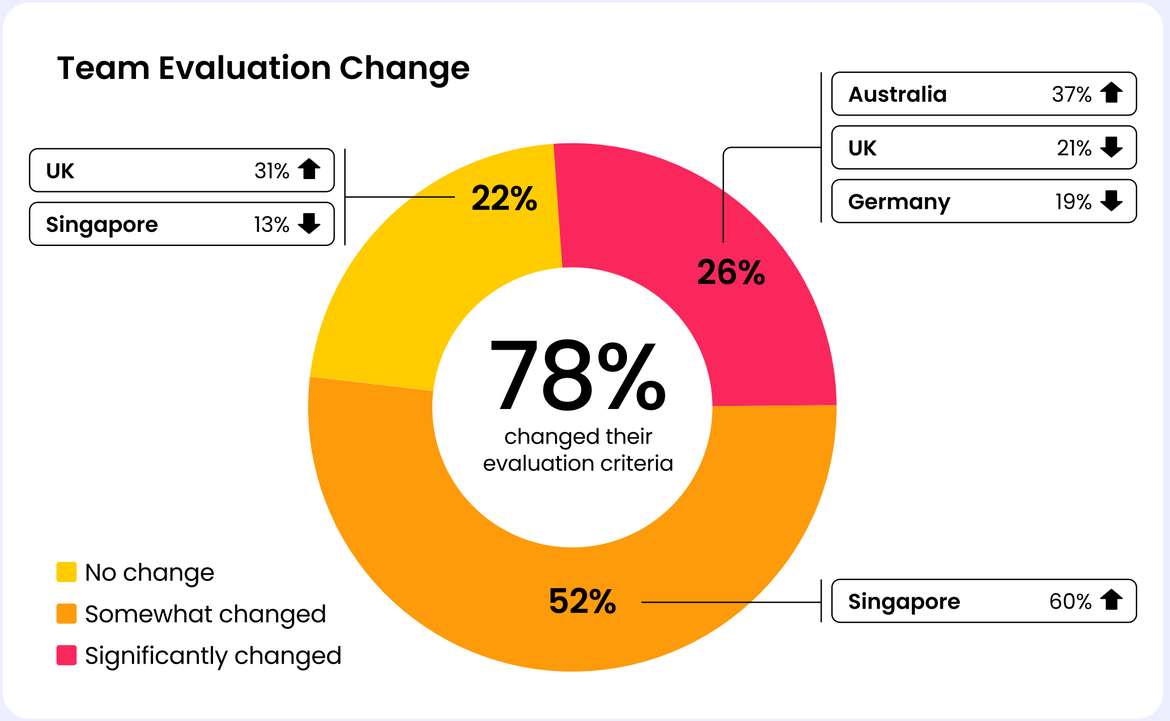
The Attribution Glare

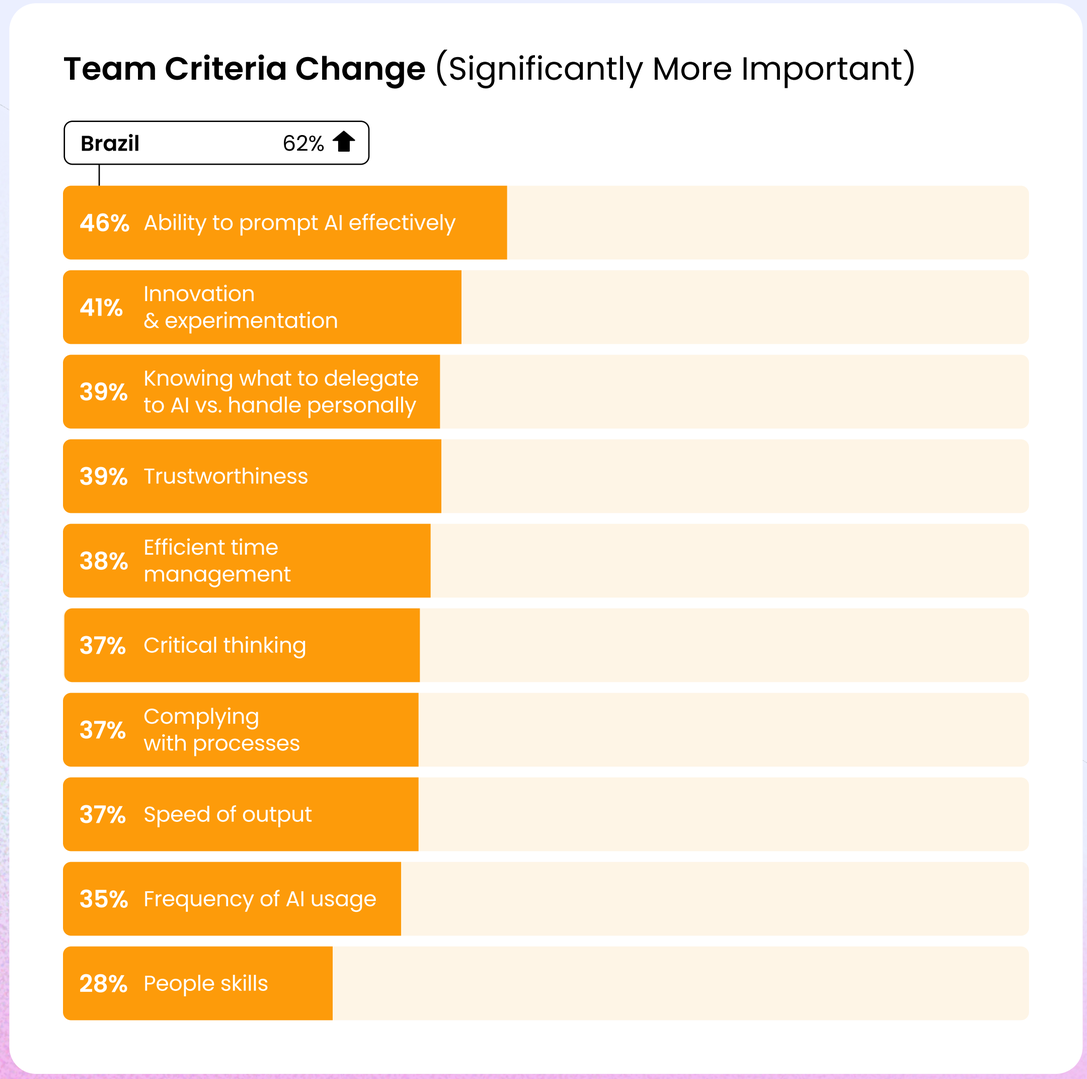
The old performance contract – deliver the work, hit the deadlines, follow the process – is losing its meaning now that AI can satisfy most of those conditions. What managers actually want from their people now is harder to define, harder to observe, and harder to develop, and they're trying to build that new relationship while simultaneously losing visibility into how work gets done. As a result, the relationship between managers and their teams is being renegotiated.

The new performance contract

Over 3 in 4 leaders have changed how they evaluate team members since AI adoption – in performance reviews, KPIs, and job descriptions. When asked which criteria for evaluating team members changed with the increased use of AI, among leaders who changed their criteria, 46% say the ability to prompt AI effectively has become a significantly more important skill for their team to have – the single most-cited rising criterion in the study.

In Brazil, that number jumps to 62%, the sharpest shift of any market. Australia leads on the bigger question: whether increased AI use has impacted evaluation criteria. More than 1 in 3 leaders describe a significant change, the highest of any market.





Managers aren't replacing the old expectations. They're adding new ones on top.

However, the data complicates a simple "old skills out, new skills in" story. Almost no existing performance criterion is losing significance in the eyes of managers. Eighty-three percent of managers consider knowing what to delegate to AI and frequency of AI usage more important since the integration of AI tools into their workflows, right alongside efficient time management, also at 83%. Speed of output rose in importance among 81% of leaders, and complying with processes among 78%. Even people skills became more important for 65% of leaders.

Ninety-one percent of leaders say their team members understand that expectations have evolved, but the tension is worth naming explicitly: managers aren't replacing the old expectations. They're adding new ones on top.

What managers are afraid of losing

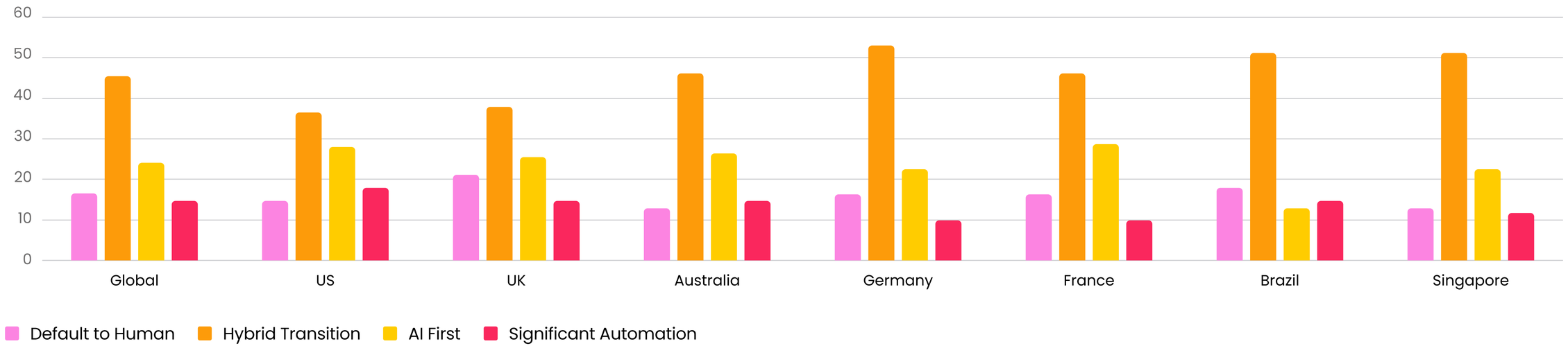
Despite these expanded expectations and a demand for AI proficiency, 34% of leaders cite over-reliance on AI and the deskilling of their employees as a top long-term fear, the second most common concern on the list after data and safety concerns. Twenty-five percent worry specifically about a decline in critical thinking.

That fear is already shaping how teams actually operate day to day. Managers are trying to figure out how their teams should collaborate with AI – anywhere from keeping the work entirely human to automating outright. Most land in the middle: 44% globally describe a "Hybrid Transition," protecting human-only tasks like empathy, ethics, and judgment while handing everything else to AI. Only 15% have gone all the way to significant automation.

The regional split is sharper than the global numbers suggest. Germany commits hardest to the hybrid middle path. Brazil matches Germany's hybrid rate but is the most reluctant to shift work into AI-run production, where refining AI output is as big a challenge as data security. The UK takes the more conservative position one step further: more managers there default to humans across the board than anywhere else, treating AI as a secondary tool rather than a default option. The US sits at the opposite end from both, least likely to land in that hybrid middle and most willing to hand AI full production work.

Team AI Allocation, by country

% of leaders



The narrative outside says AI replaces people. But only 1 in 7 surveyed managers say they have been expected to reduce their team size over the last year. For most of these companies, the data says something closer to the opposite – managers are actively reserving work that depends on the human qualities AI can't replicate, and are not focused on replacing their employees with AI.

> **Only 1 in 7 surveyed managers say they have been expected to reduce their team size over the last year.**

The accountability loop

The same concern about deskilling and critical thinking doesn't stop managers from leaning on AI just as heavily. Forty-six percent use it to review their own decisions, effectively asking AI to weigh in on judgment calls. Forty-five percent use it to structure general feedback to others. Thirty-nine percent use AI to draft performance reviews. And 36% use it to identify blind spots in their own leadership – asking the tool to catch what they can't see in themselves.

monday.com workspace insights indicate that executives create 3.6× more agents than staff, while directors and managers build 2.1× more – a reasonable response to a growing workload.

Who gets promoted?

Fifty-three percent of managers say it's become harder to evaluate an employee's original contribution since AI entered the workflow, with Singapore (63%) and Australia (59%) being the two hardest-hit markets. When work comes back polished and complete, you can't easily tell how much of the thinking was human, or how much the AI carried. You can't see the judgment call that shaped the prompt, or the instinct that caught an error before it shipped. The qualities managers most want to develop in their people are, increasingly, the ones they can least observe. Forty-seven percent say they've increased the time spent reviewing and guiding team output since AI became widespread.

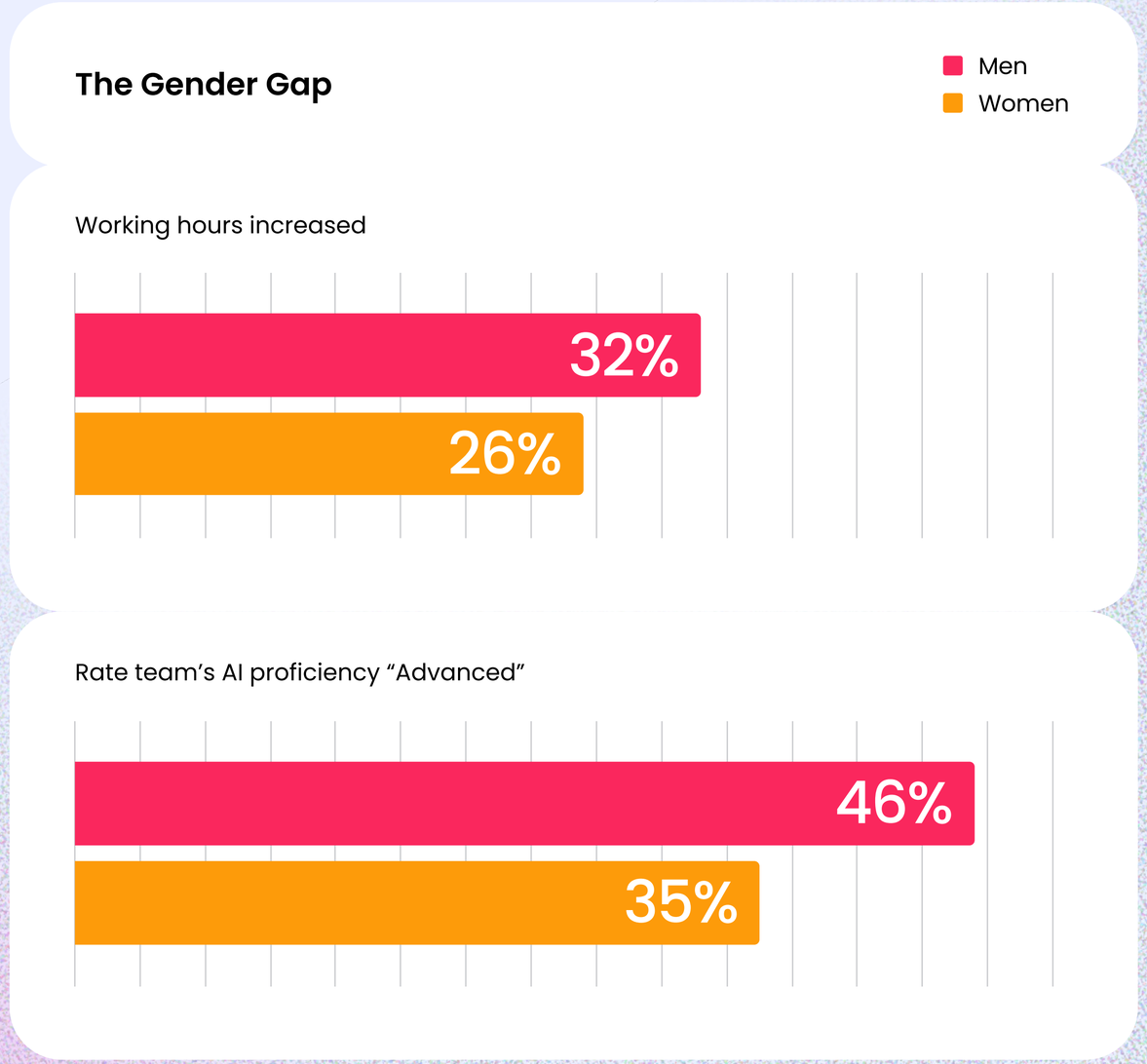
So what are managers doing in response? In Australia, 40% already use AI to help draft the performance reviews meant to judge that same work. In the US, more than a third do. For employees leaning on AI just as heavily, the question becomes: what does a fair review even look like when neither side is working unassisted?



Higher burden, lower accuracy

That difficulty evaluating AI-assisted work isn't distributed evenly either – and it doesn't fall where expected. Male leaders report longer working hours, greater decision fatigue, and more difficulty telling how much of a piece of work is genuinely someone's own than their female counterparts do. Working hours increased for 32% of men, versus 26% of women.

And yet the confidence runs the other way. The same men struggling more with exactly this problem are also the ones rating their teams' AI proficiency higher – 46% call their team "Advanced," versus 35% of women. More strain, less accuracy, more confidence anyway. It's the same gap this whole report keeps finding between what people say they can see and what they're actually confident about.



The Oversight Glare

Soon, collaboration won't only mean working with people. Fifty-eight percent of managers expect to be managing more AI agents than human employees within 12 months.

Asked in which work scenarios they envision AI agents being most valuable, managers converge on the same short list: data analysis and reporting (56%), automating repetitive administrative tasks (51%), and researching and gathering information (50%).

monday.com workspace insights indicate that users build agents that support their own function's specific responsibilities, usually at 20 to 30% of a team's agents.

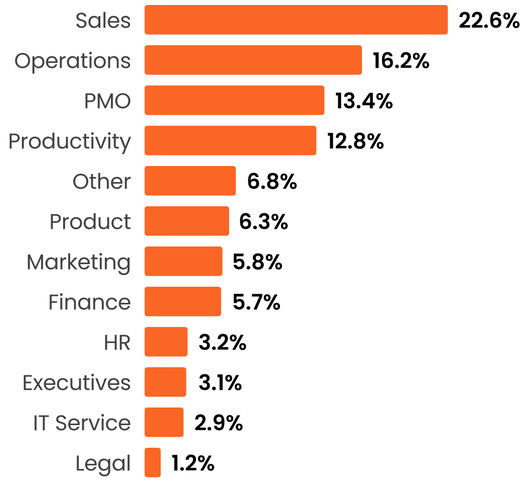
Marketing and sales teams each land at about 23%, and HR is the most inward-looking at 30%. Finance is the exception: only 15% of its agents are finance agents, less than the 17% it builds for project management.
The larger share of agents, though, serves the work around the work.

> **58% of managers expect to manage more AI agents than human employees within 12 months.**

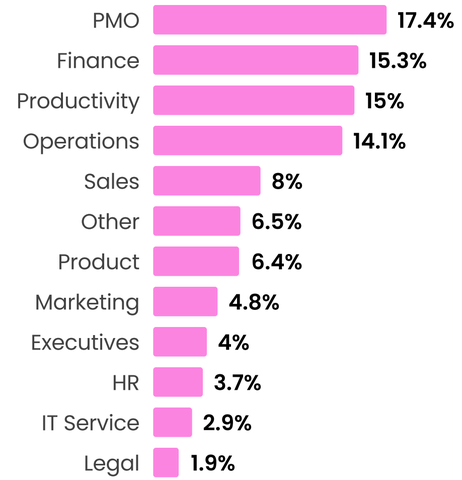
Project management, productivity, and operations together account for between a third and half of agents for most groups, ahead of any single functional domain. That is consistent with what leaders said they expect from agents: data analysis and reporting, automating repetitive administrative tasks, and project management and coordination (38%).

Agents as a force multiplier

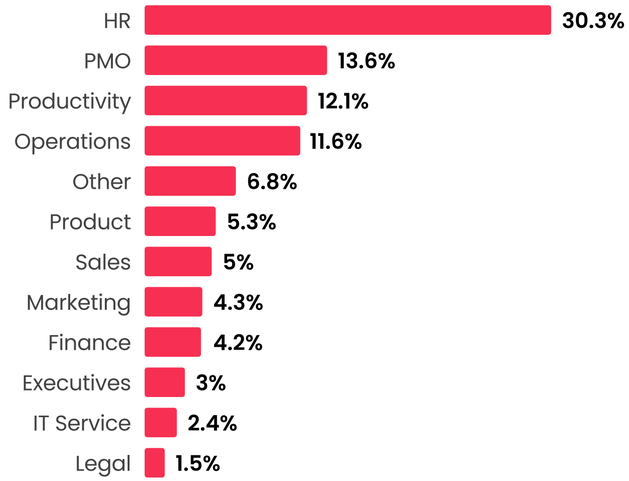
Sales



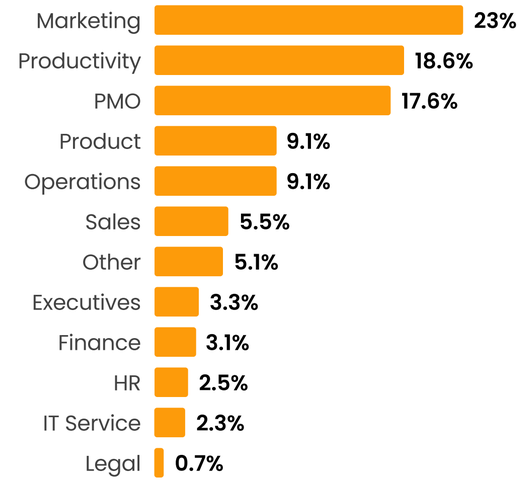
Finance



HR



Marketing



Source: monday.com workspace insights

> Some of the fears around agentic AI echo the ones managers already have about their human teams.

Where the work goes when it’s delegated, not removed

However, some of the fears around agentic AI echo the ones managers already have about their human teams. There's the same worry about oversight – 46% worry about losing oversight or control over an agent's actions entirely, the same anxiety that shapes how they manage people, now applied to something that was never built to explain itself. There's the same worry about what leaning on the tool does to the humans around it: 47% worry about over-reliance and the deskilling of their own employees that follows. And there's a newer worry, specific to handing work to something that isn't a person: 35% worry about being held personally accountable for a decision an agent made that they didn't fully choose and can't always predict. Handing over a task, it turns out, doesn't hand over the responsibility that comes with it.

47%

Over-reliance and employee deskilling when using agents

46%

fear a loss of oversight and control over agent actions

35%

fear being held personally accountable for AI’s decisions

> In Australia, 62% say testing where AI adds value takes more effort than it saves.

> 55% of UK leaders expect to be managing more agents than people within the year.

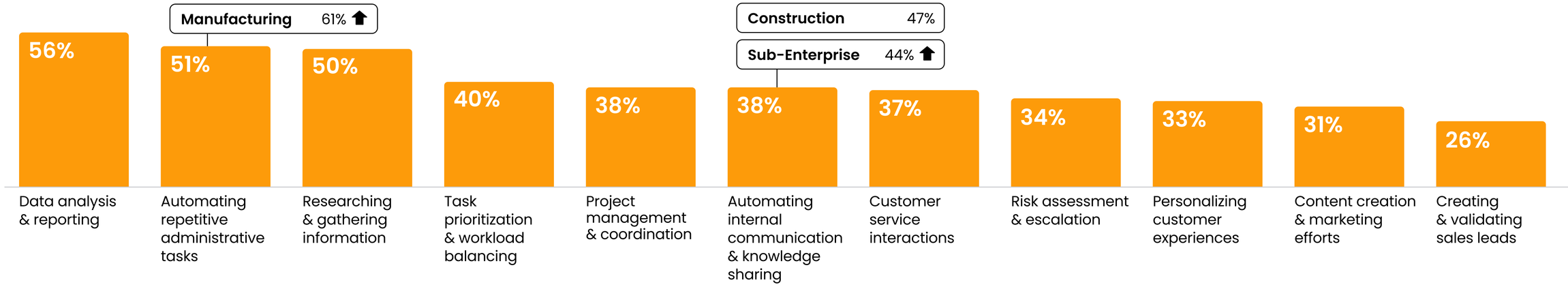
Australia shows what those fears look like once they stop being hypothetical. Forty-six percent already use agents for multi-step automation, versus 38% globally.

However, the technology built to remove work may be turning execution into supervision instead. Fifty-nine percent of Australian managers say they're spending more time reviewing and guiding team output, the highest rate of any market, and a third say their working day has actually gotten longer.

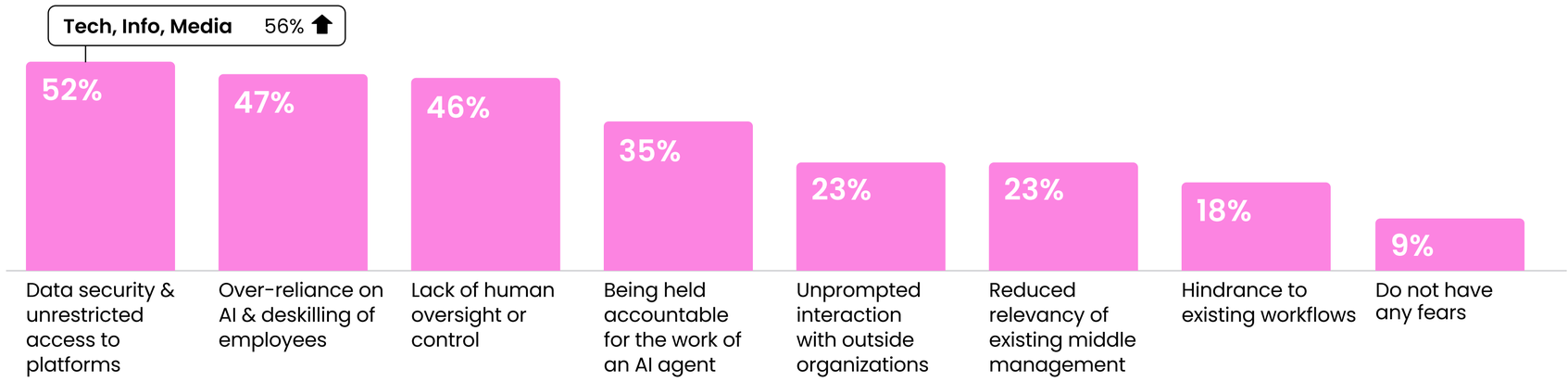
The tools compound the problem: 58% report their software has grown more interdependent, and 62% say testing where AI adds value takes more effort than it saves. AI agents may be creating a new layer of invisible labor – deciding what to delegate, checking what happened, resolving mistakes, and carrying the responsibility for the outcome.

UK managers feel a version of this most concretely: 55% expect to be managing more agents than people within the year, and while data security remains their single most-cited fear at 58%, 38% fear being held accountable for an agent's work.

Agentic Drivers



Agentic Barriers



Q. In which work scenarios or workflows do you envision AI agents being most valuable within your organization?

Q: What are your fears as a leader in using Agentic AI in a professional context? Base: Familiar with Agentic AI: Total (n=1614), Construction (n=94), Manufacturing (n=123), Sub-Enterprise (n=389), Tech, Info, Media (n=618)

But the single most-cited fear of all isn't about the agent's judgment – it's about its reach. Fifty-two percent worry about an agent accessing data without sufficient restrictions, more than any other concern on the list. And at the far end is the fear that goes furthest: 23% worry agents will reduce the relevance of existing middle management altogether – not just a question of watching the agent, but of whether there's still a role doing the watching.

52%

worry about an agent accessing data without sufficient restrictions

23%

worry agents will reduce the relevance of existing middle management

Expanding the View

Naming a glare doesn't dim it. What widens the field of view is deliberate design: the specific choices that build oversight in, make contribution visible, and turn infrastructure into something teams don't have to reconstruct on their own. These recommendations are how monday.com approaches the agents we design every day for ourselves and our customers.

Embed the context.

Like humans, agents need to be able to understand the full logical trail – ideation, discussion, mistakes, and success – that led the team to the current moment. In practical terms, this means allowing them to digest the appropriate meeting notes, workflows, and prior materials produced by the team. Their work is then informed by history, and the infrastructure glare eases because teams stop rebuilding context tool by tool.

Make collaboration visible by design.

Seventy to eighty percent of agents built on monday.com are used to add skills the team doesn't currently have. Forty-seven percent expect agents to be full-fledged members of their team. That expands what teams can do, but it also makes mistakes easier to miss, because people are less attuned to errors outside their own discipline. That is why the record of who did what should live wherever people and agents work together. Customers are asking for it, with 29% wanting an audit trail of what an agent did and why. A true collaborative relationship, where humans lead and agents act and then receive feedback, should make it easier to pinpoint contribution, and the attribution glare starts to lift.

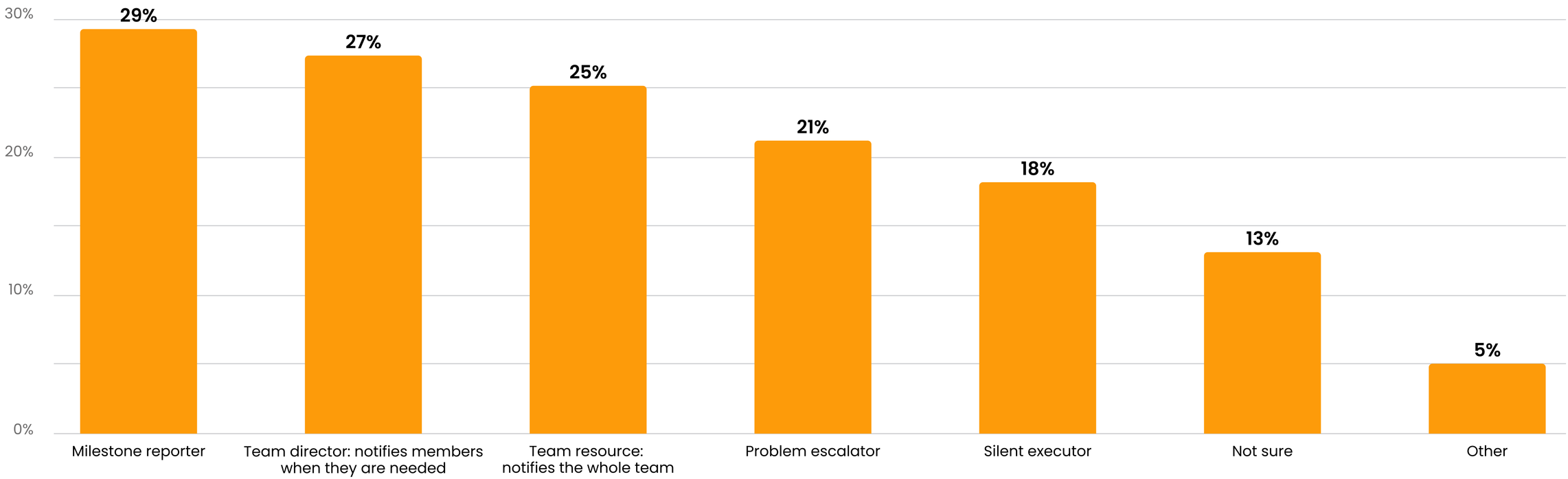
Mark the path before the agent walks it.

Agent design needs to clearly establish what it can and cannot do, and where it does and does not have access. monday.com's customers are already asking for this structure, with 36% wanting an approval step before an agent executes and 35% wanting control over what data an agent can access.

Establish the governance layer early.

All agents require an accountability mechanism. Smaller but real shares want regional regulation compliance and role or department-based feature restrictions. The governance ask isn't uniform, but it is specific. Only 18% want a fully autonomous, silent agent. The clear preference is for agents that report at milestones or escalate problems as they arise. Build in checkpoints, not blind trust, and the oversight glare fades.

How you'd want an AI agent to work and communicate



Which of the following best describes how you'd want an AI agent to work and communicate on your team's tasks? (customer survey, July 2026, n=2,076)

Appendix: Methodology

This report draws on three distinct research sources, each covering a different layer of how organizations are adopting and governing AI.

Nielsen Media Research: AI adoption study

Commissioned by monday.com and fielded by Nielsen Media Research in April 2026. Respondents were 1,701 directors and senior managers at companies with at least 500 employees, surveyed across seven countries: the US (n=350), UK (n=350), Australia (n=200), Germany (n=200), France (n=201), Brazil (n=200), and Singapore (n=200). The sample was balanced in each country by job level (51% director, 49% senior manager) and department (48% IT, 52% non-IT), with company size split across medium (500–1,499 employees, 53% of respondents), sub-enterprise (1,500–4,999, 24%), and enterprise (5,000+, 23%). This is the source for the leader- and manager-level statistics throughout the report.

monday.com workspace insights on agents

Aggregated usage insights from 348,718 monday.com agents. These insights inform the agent-related findings referenced throughout the report.

monday.com customer research: AI collaboration study

Fielded in July 2026 as part of monday.com's annual research program. Surveyed 2,076 users across 2,052 customer accounts, spanning monday.com's account tiers and company sizes, with a regional spread weighted toward North America (59%), followed by EMEA (26%), APJ (9%), and LATAM (6%). This is the source for the customer survey findings in the Expanding the View section.

Together, these three sources let the report move between three vantage points: what leaders believe and report about themselves (Nielsen), what monday.com's customers say they want from AI governance (customer research), and what workspace usage insights show.



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