

Larridin State of Enterprise AI 2026

From AI Exploration to AI Accountability: Why Measurement Is Strategy

February 2026



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Executive Summary: From AI Exploration to Accountability — Why Measurement Is Now the Strategy

The Shift in Expectations:

In 2025, organizations raced to secure AI licenses and greenlight pilots. In January 2026, the conversation changed completely: CFOs want proof.

The Measurement Gap:

With global AI spending reaching **\$1.5 trillion in 2025** and projected to exceed **\$2 trillion in 2026** according to [Gartner](#), the era of funding AI on faith is ending. The Larridin State of Enterprise AI Report for Q1 2026 reveals a widening "Organizational Divergence"—the gap between companies that measure their AI landscape and those that merely fund it has become a competitive chasm.

The Visibility Mirage:

Our survey of 364 enterprise leaders across 16 industries exposes a troubling paradox: **executives claim unprecedented confidence in their AI oversight while simultaneously admitting they cannot connect usage to outcomes.** This "Visibility Mirage" threatens to derail multi-million dollar investments.

The Competitive Differentiator:

The organizations pulling ahead share one characteristic: independent, ground-truth measurement that cuts through self-reported data and vendor dashboards.

TL;DR Takeaways

The data in this report tells a single story: the measurement gap is now the profitability gap. Organizations that cannot see their AI landscape cannot optimize it, govern it, or prove its value. Below are the eight findings that should reshape how you approach AI in 2026.



The Visibility Mirage: Stem the Widening Confidence Gap

What executives think they know isn't what's actually happening.



The Complexity Paradox: Add a Multi-Tool Stack to Improve Success

The single-vendor strategy is dead. But complexity without visibility is just expensive chaos.



Sector Divergence: The ROI Winners and Stragglers

Some industries are reporting strong ROI within six months, while others are hamstrung by workflow readiness.



The Role-Based Reality: Different Functions Deliver Different Results

IT shows high impact while other functions, such as Customer Success, are less successful.



The Measurement Ownership Crisis: Who is Responsible for AI Value?

Enterprises rely on surveys and vendor metrics today but are seeking KPI and utilization correlation.



The Enterprise Landscape: AI Tool Adoption Sprints Ahead of Controls

Almost 50% of AI in use is procured outside of the IT/Legal/Procurement process, creating opportunities to discover the unmonitored majority.



The Governance Gap

69% of Organizations report they have AI policies, but 37% admit their governance is inconsistent. Organizations confuse having a policy with executing oversight. 81% report satisfaction with their guardrails — yet **45.6% don't know their workforce adoption rate and 37.1% admit risk visibility is unknown**. Policy on paper isn't governance in practice.



Barriers to Visibility are Organizational

58.2% cite structural issues — unclear responsibility or fragmented ownership — as barriers. Technical infrastructure problems rank near the bottom at just 15.1%.



Key Terms

- 1. AI Stack:** The collection of AI tools an organization uses across different functions and use cases. High-performing organizations typically employ multiple specialized tools rather than relying on a single platform.
- 2. Digital Labor Maturity:** An organization's ability to deconstruct knowledge work into discrete tasks that can be augmented by AI. Enterprises with high digital labor maturity can map workflows to AI capabilities; those with low maturity treat AI as a bolt-on to existing processes.
- 3. Ground-Truth Telemetry:** Measurement data collected directly from actual usage patterns at the desktop or browser level, independent of self-reported surveys, vendor dashboards, or internal estimates.
- 4. Confidence Chasm:** The gap between what executives believe about their organization's AI capabilities and what operational managers actually observe. Our data shows a 16-point confidence gap between C-suite and Director levels.
- 5. Organizational Divergence:** The widening competitive gap between organizations that measure their AI landscape comprehensively and those that merely fund AI initiatives without visibility into outcomes.
- 6. The 10-Hour Ceiling and Productivity Debate:** The baseline level of AI-driven time savings where most workers remain stuck — typically under 10 hours per month. 85.7% of the workforce has not broken through this ceiling.
- 7. Utilization vs. Proficiency:** The distinction between measuring whether employees use AI tools (utilization) versus whether they use them effectively to create value (proficiency). Most organizations track only the former.
- 8. Shadow AI:** The use of AI tools by employees without formal IT approval, oversight, or governance — typically through personal accounts, browser-based tools, or unsanctioned applications. This is like Shadow IT of previous decades, but Shadow AI involves systems that learn from, store, and process sensitive information.
- 9. Visibility Mirage:** The phenomenon where executives claim high confidence in AI oversight while simultaneously admitting significant blind spots. For instance, 92.4% of executives claim "full visibility," while 20.7% of the same group cite Shadow AI as a primary barrier.



Section I: The Visibility Mirage: Stem the Widening Confidence Gap

What executives think they know isn't what's actually happening

There is a 16-point "Knowledge Leak" between the C-suite and the people actually managing teams and budgets: Directors — the operational layer closest to the work—are significantly more skeptical of their organization's oversight capabilities. This isn't pessimism; it's proximity to reality.

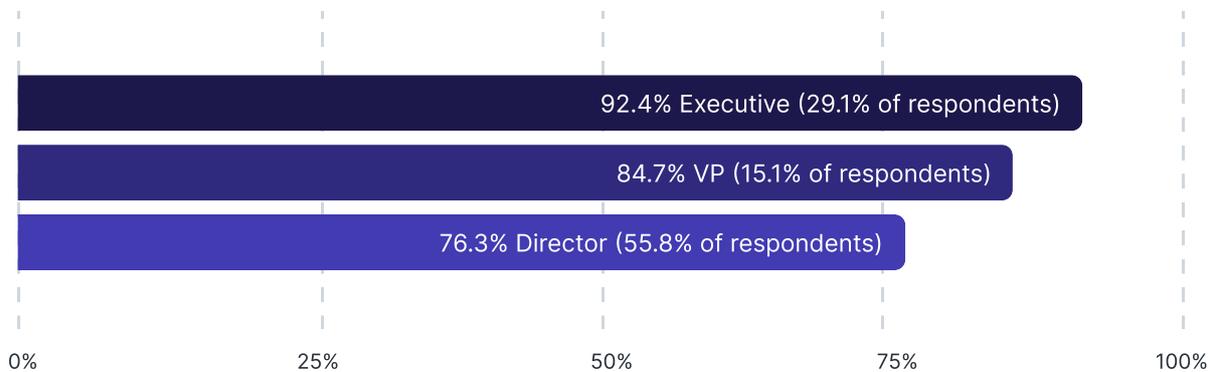
92.4%

of executives claim "full visibility" into AI usage.

That number sounds reassuring until you examine what lies beneath it.

Our data reveals a 16-point "Confidence Chasm" between the C-suite and the people actually managing teams and budgets:

Perceived AI Visibility by Seniority Level



Directors — the operational layer closest to the work — are more skeptical of their organization's oversight capabilities.

The Shadow AI Contradiction

Here's what makes the confidence numbers even more suspect: 20.7% of leaders cite Shadow AI—employees using personal accounts and unsanctioned tools — as a primary barrier to AI success. Yet 84.3% of those same leaders still claim "high confidence" in their overall visibility.

This tracks with broader industry findings. Research from the Cloud Security Alliance found that 90% of enterprises are concerned about Shadow AI from a privacy and security standpoint, and nearly 80% have already experienced negative AI-related data incidents. A Microsoft study found 75% of workers use AI at work, with 78% of this group using their own tools to do so. Gartner predicts that by 2027, 75% of employees will acquire, modify, or create technology outside IT's visibility — up from 41% in 2022.

The diagnosis:

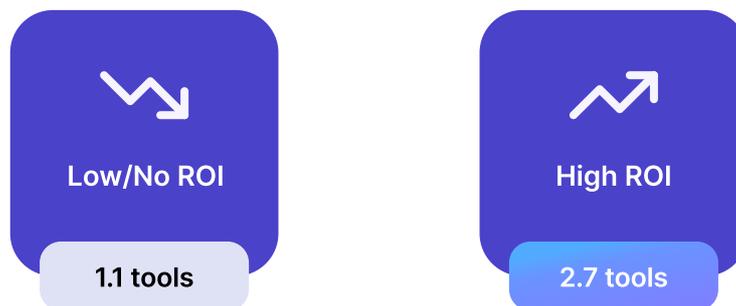
Executives are confusing procurement with visibility. They see what they bought. They don't see what's actually being used.

Section II: The Complexity Paradox: Add a Multi-Tool Stack to Improve Success

Complexity Drives Value — But Creates New Risks

The single-vendor AI strategy is dead. Our data shows a direct correlation between tool diversity and ROI:

Average Number of AI Tools by ROI Level



High-performing organizations are building what we call "AI stacks"—integrating specialized tools for different functions and using different models (LLMs) for different workflows and uses. This aligns with McKinsey's 2025 findings that AI high performers are using AI across multiple business functions, not isolating it to single teams.

The Big Four - the hidden problem:

Most IT governance focuses on the Big Three (ChatGPT, CoPilot, Claude, Gemini) because they're easy to license centrally. But the "long tail" of specialized tools—presentation builders, automation agents, analytics platforms—is where much of the actual AI work happens. And CFOs optimizing their Microsoft spend may be overlooking significant value provided by dozens of unmeasured tools.

22%

of leaders now cite "Tool Overlap and Redundancy" as a top budget drain.

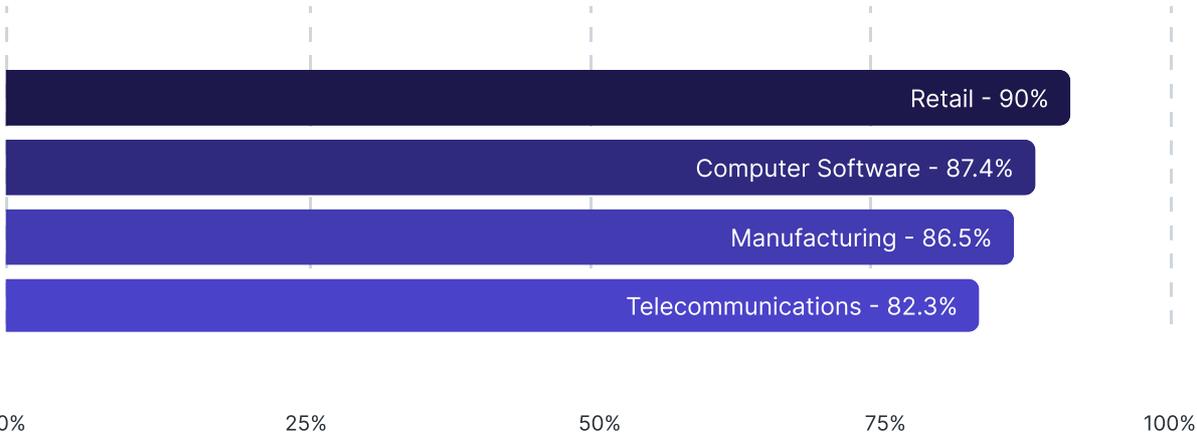
You cannot optimize a stack you cannot see. The rapid embrace and experimentation with AI tools as well as AI embedded within many existing SaaS platforms creates an exponentially larger opportunity for overlap and redundancy than what leaders experienced with moving to SaaS and/or cloud platforms.

Section III: Sector Divergence: The ROI Winners and Stragglers

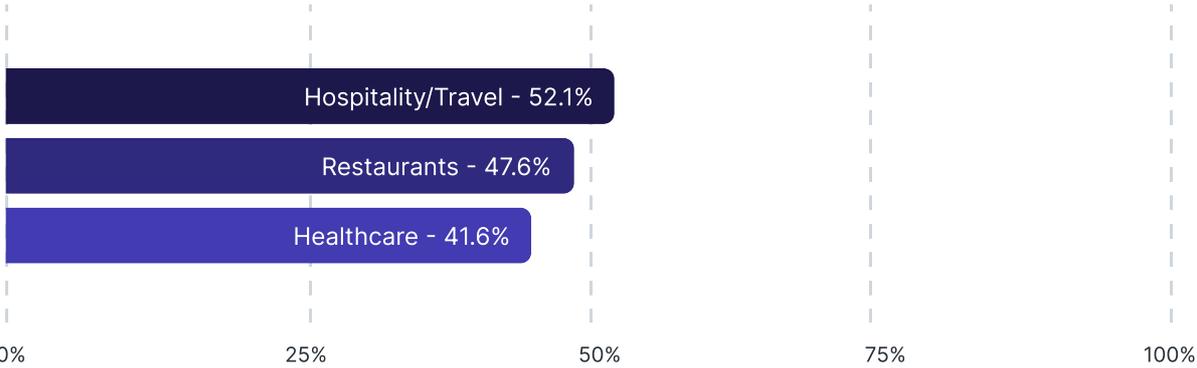
Who's Winning, Who's Struggling

AI is no longer lifting all boats equally. Our data reveals stark differences in ROI likelihood by industry. Retail leads the way, with 90% of respondents expecting an ROI within six months. Healthcare and hospitality are significantly more conservative about their timeline to ROI. Leaders show roughly double the ROI likelihood of laggards.

Industries with the Highest Likelihood of AI ROI (Within 6 Months)



Industries with the Lowest Likelihood of AI ROI (Within 6 Months)



Why the gap exists:

ROI correlates directly with "digital labor" maturity — the ability to deconstruct workflows into discrete, AI-augmentable tasks. Sectors that have successfully mapped and automated knowledge work are seeing immediate gains. Those treating AI as a "bolt-on" to physical or legacy processes are stalling.

This pattern matches McKinsey's findings that organizations fundamentally redesigning workflows — not just adding AI to existing processes — are three times more likely to achieve significant value.

The Healthcare Paradox

Healthcare deserves special attention. Despite claiming 75% visibility confidence — among the highest of all sectors — healthcare shows the lowest ROI likelihood at 41.6%.

High confidence. Low results.

The culprit is likely governance friction. Healthcare operates under stringent regulatory requirements (HIPAA, clinical decision support rules) that create legitimate barriers to AI deployment.

Section IV: The Role-Based Reality: Different Functions Deliver Different Results

Not All Functions Are Equal

Not surprisingly, IT professionals are the business function showing the most confidence in achieving ROI within six months, and also the group with the highest confidence in their visibility into AI usage. In spite of widespread use of chatbots by customer success, the Customer Success executive respondents had the least confidence in their ROI outlook and in visibility. This mirrors recent articles detailing Salesforce re-hiring the customer success people they had dramatically fired in favor of AI. Our survey captured responses across functional areas.

Business Function	ROI Confidence (6-Mo Outlook)	Visibility Confidence	The "Governance Gap"
Information Technology	88.9%	87.3%	-1.6%
Legal	86.7%	86.7%	0.0%
Training	85.7%	71.4%	-14.3%
Marketing	80.0%	86.7%	+6.7%
Sales	75.0%	68.8%	-6.2%
Finance	74.3%	88.6%	+14.3%
Human Resources	70.8%	83.3%	+12.5%
Logistics	61.1%	66.7%	+5.6%
Customer Support	54.5%	59.1%	+4.6%

The data reveals a massive "confidence chasm" between Information Technology and the operational functions of Customer Support and Logistics. IT is not just using AI more; they are using it *fundamentally differently*.

The difference is between "Building" and "Summarizing."

1 The Tool Velocity Gap (Quantity & Complexity)

- **IT Professionals** are the power users of the enterprise, utilizing an average of **3.67 distinct AI tools** as reported in the survey. Their stack is sophisticated, led by **OpenAI, Google Gemini/Vertex, and AWS Bedrock**, but notably includes specialized engineering tools such as **GitHub Copilot** and **Perplexity AI**.
- **Customer Support (1.73 tools) and Logistics (1.39 tools)** are using less than half the variety. They are largely restricted to a single primary LLM (OpenAI) or a specific embedded tool (Salesforce Einstein for Support, Lindy.ai for Logistics).

2 The Outcome Divergence (Speed vs. Struggle)

- **IT is winning the speed race: 90.5% of IT professionals** report that AI has been "Highly Effective" in improving their project delivery speed. Because they use AI to generate code, automate infrastructure, and debug, the impact is structural and immediate.
- **Support & Logistics are hitting a wall: Only 63.6% of Customer Support and 55.6% of Logistics** report similar gains. For these roles, AI is often used for "Micro-Tasks" (drafting emails or summaries) which provide incremental help but don't fundamentally re-engineer the workflow.
- **Frontier workers greatly outpace everyone else in utilization:** OpenAI's 2025 enterprise report found that enterprise users save 40-60 minutes per day on average. But these gains aren't distributed evenly. The "frontier workers"—the top 5% of AI users—send 6x more messages than median employees and engage more intensively across advanced capabilities.

3 ROI Confidence: The "Visibility" Penalty

- **IT (88.9% ROI Confidence):** IT teams have a clear view of their output. They can measure code commits, deployment frequency, and server uptime. This direct line of sight leads to massive confidence in their 6-month ROI.
- **Support (54.5% ROI Confidence):** Despite the hype around AI chatbots, Support professionals are the most skeptical. They are dealing with "hallucination management" and "human-in-the-loop" requirements that currently act as a drag on ROI.
- **Logistics (61.1% ROI Confidence):** Logistics sits in a "Measurement Limbo." While they see some gains in coordination, the lack of end-to-end telemetry makes it difficult for them to prove the value to the CFO.

The Customer Support Warning

Across all industries, Customer Support roles report the lowest ROI likelihood (54.5%) and the lowest visibility confidence (59%).

Organizations are pouring money into AI support bots—one of the most common enterprise AI use cases. But the teams running these implementations feel they're flying blind more than any other department. There are also bots to help the agents help the customers - during phone calls, for example. Some warn the agent if the customer seems to be getting upset, which can trigger escalation protocols.

IT Wins Because It Builds; Finance Struggles Because It Summarizes

Finance teams report 88.6% visibility confidence—among the highest of any function. But their ROI realization (74.3% ROI likelihood) lags significantly behind IT (88.9% ROI likelihood).

The difference: IT uses AI to build. Finance uses AI to summarize.

Building with AI — generating code, creating applications, automating workflows—produces measurable output that compounds. Summarizing documents or drafting emails produces convenience that doesn't scale.

McKinsey found the same pattern: software engineering, manufacturing, and IT show the strongest cost reductions from AI, while functions focused on content consumption see more modest gains.

Section V: Is the "10-Hour Ceiling" Really Success? What is AI Productivity?

The 10-Hour Ceiling

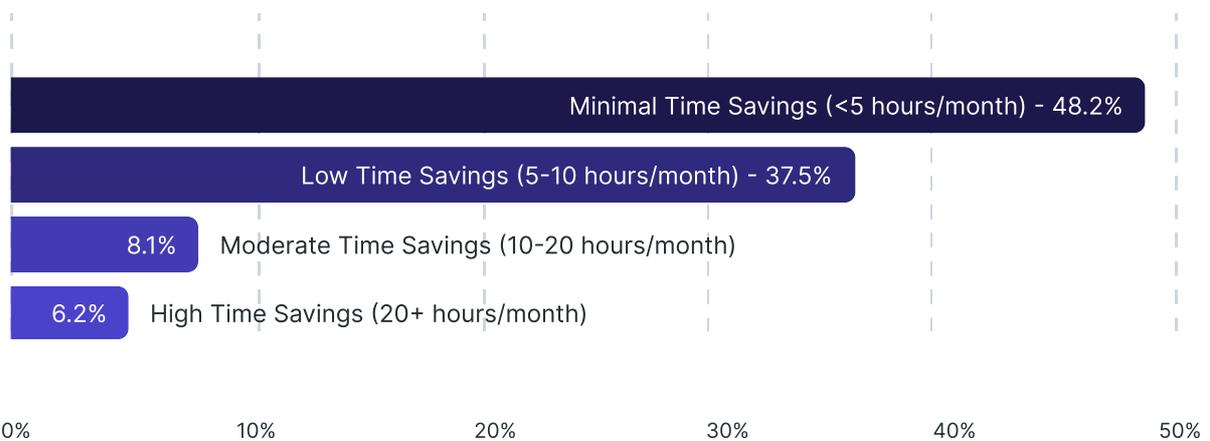
Despite claims of developers gaining 10x increases in productivity and fully automated offices, most workers are stuck with minimal or low time savings.

85.7%

of the workforce remains in the lowest two tiers of time savings — likely under 10 hours per month.

OpenAI's research found that "frontier workers" (95th percentile) are achieving dramatically better results than median employees. This isn't about access — it's about proficiency.

The breakdown



The top 6% saving 20+ hours per month — the "Power Users" (or OpenAI's Frontier Users) — represent the key to 2026. The delta between them and everyone else is where the productivity opportunity lives.

Enterprises can't move workers from "Micro-Taskers" to "Power Users" without measuring proficiency, in addition to utilization.

Organizations With Training See 2.7x Higher Proficiency

Our data shows that formal AI training programs correlate with:

- **2.7x** higher proficiency scores
- **4.1x** higher user satisfaction ratings
- **3.2x** higher productivity gains

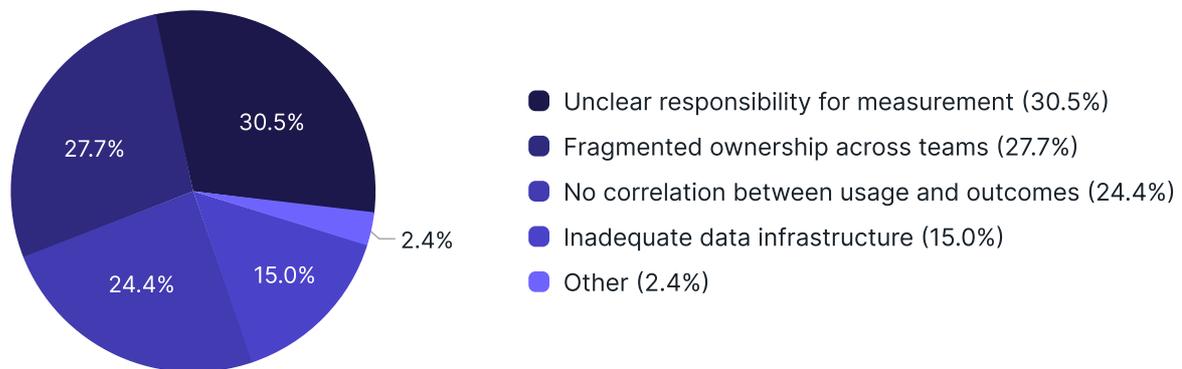
This matches McKinsey's finding that "rewiring" organizations for AI — including talent development, workflow redesign, and clear operating models — separates high performers from everyone else.

Section VI: The Measurement Ownership Crisis: Who Owns AI Productivity?

The Biggest Barrier Isn't Technical — It's Structural

Ask leaders why they can't measure AI impact, and the answers reveal the real problem. AI is everywhere, no one leader owns the AI transformation initiatives, and current measurement systems are not tailored for AI, nor do they connect AI usage and proficiency with business impact.

The breakdown



Technical barriers have plummeted in importance compared to 2024. The engines exist. The problem is that nobody installed the dashboard.

58.2%

of organizations cite structural issues — unclear responsibility or fragmented ownership—as their primary barrier to AI measurement.

This isn't an IT problem. It's an leadership problem.

The Policy Payoff

Organizations with formalized AI risk and compliance policies are **2.2x more likely to demonstrate ROI** than those without (84.5% vs. 37.9%).

This finding reinforces what the Cloud Security Alliance documented: governance maturity is now the strongest indicator of AI readiness. Organizations with established governance show tighter alignment between boards, executives, and security teams—and greater confidence in protecting AI deployments.

Policy isn't just about safety. It's a prerequisite for value. You cannot scale what you're afraid of, and you cannot measure what you haven't defined.

Section VII: The Enterprise Landscape: AI Tool Adoption Sprints Ahead of Controls

Countless enterprises measure their AI success by a single metric: the percentage of employees who report using AI.

Nvidia's CEO Jensen Huang has become the poster child for this approach. In an October 2025 interview with Citadel Securities, Huang declared that 100% of Nvidia's software engineers and chip designers use the AI coding assistant Cursor. At a November 2025 all-hands meeting, he went further, telling employees: "I want every task that is possible to be automated with artificial intelligence to be automated with artificial intelligence." When informed that some managers were telling their teams to use AI less, Huang's response was blunt: "Are you insane?"

The mandate is clear. But mandates create unintended consequences.

When leadership pushes for universal AI adoption without corresponding measurement infrastructure, employees respond rationally: they experiment. They find tools that work for them — often outside of procurement and IT. They solve problems. And they don't always report back.

This creates a Shadow AI environment where:

- **Hidden successes go unscaled.** An employee discovers a workflow that saves 10 hours a week. Without visibility, that innovation stays siloed.
- **Learning remains unshared.** Best practices develop in pockets. The organization pays for the same lessons multiple times.
- **Redundancy multiplies.** Three departments license three different tools that do similar things. No one knows.
- **Data leaks through the cracks.** Employees paste internal information into consumer-grade tools with unclear data retention policies.
- **Security risks compound invisibly.** Each unsanctioned tool is an unmonitored attack surface.

The irony is stark: the harder organizations push for AI adoption, and the more creatively their employees respond, the less visibility they have into what's actually happening — unless they invest strongly in measurement.

Larger Organizations Are Scaling, But With Growing Pains

Organizations with 5,000+ employees report higher AI adoption rates, but also higher rates of tool fragmentation and governance challenges. **The average enterprise now has 23 different AI tools in use, with 45% of adoption happening outside formal IT procurement.**

45%

With 45% of adoption happening outside formal IT procurement, while the average enterprise now has 23 different AI tools in use.

Only 38% of organizations maintain a comprehensive inventory of AI applications in use. For enterprises that need or want to comply with ISO 42001, they will need a continually updated, [comprehensive inventory of AI in use](#).

The Policy Paradox: Most Have Rules, Few Have Results

Our survey reveals a deceptively reassuring headline number: 69.2% of organizations report having AI risk and compliance policies in place. Another 22.8% admit they don't, and 7.9% aren't sure.

At first glance, this suggests the enterprise world has governance under control. But dig into what those policies actually deliver, and the picture fractures.

81%

report satisfaction with their AI risk and compliance guardrails.

(37.9% very satisfied, 43.1% satisfied) Leaders feel good about the rules they've written.

Yet when asked about the challenges they face measuring AI impact, the same respondents expose the gap between policy and practice:

Barriers Cited by Respondents

45.6%

Workforce AI-adoption rate unknown

37.1%

AI governance inconsistent & risk visibility unknown

30.8%

AI maturity vs. impact correlation unknown

28.9%

Lack of clear value-benefit metrics

37.1%

admit their governance is inconsistent and risk visibility is unknown — even as 81% claim satisfaction with their guardrails.

This is the Governance Gap in action: organizations confuse having a policy with executing oversight.

The Structural Barriers Are Organizational, Not Technical

When we asked what limits the ability of organizations to measure AI's enterprise-wide impact, the answers confirmed that governance failures stem from organizational design:

Barriers Cited by Respondents

45.6% Unclear responsibility for AI strategy	27.7% Fragmented ownership of AI projects
25.5% Weak governance and risk visibility	24.7% Employees resist adoption
24.5% No correlation of AI use to business outcomes	22.0% Tool overlap and redundancy
17.6% Employees use their own accounts (Shadow AI)	15.1% Inadequate data infrastructure

Structural issues — unclear responsibility and fragmented ownership—are cited as the leading barriers. Technical infrastructure problems rank near the bottom at just 15.1%.

The message is clear: organizations have the technology to govern AI. What they lack is the organizational architecture to execute governance consistently.

17.6%

of respondents explicitly acknowledge that employees using personal accounts is a barrier to measurement.

This likely understates the problem — Shadow AI is, by definition, invisible to those being surveyed.

Combined with the 45.6% who admit their workforce adoption rate is unknown, the data suggests that most organizations cannot answer a basic question: Who is using AI, and how?

You cannot govern what you cannot see. And you cannot see what you're not measuring.

The Industry Context

Our findings align with broader research. According to industry studies:

- **78%** of organizations use AI in at least one function [McKinsey 2025](#) ↗
- **Only 25%** have fully implemented AI governance programs [AuditBoard 2025](#) ↗
- **Only 2%** combine gold standard governance with continuous monitoring [InfoSys](#) ↗

The EU AI Act's first enforcement deadline passed on February 2, 2025. The second [arrives in months](#). Organizations "planning for 2026" are already behind.

Research also shows that 97% of organizations experiencing AI-related breaches [lacked AI access controls](#), and 63% had no formal AI governance policy. This confirms that governance execution — not AI capability — is the dominant risk factor.

What Effective Governance Actually Tracks

Despite confidence of **more than 75%** that enterprises have “**full visibility**” into AI usage, a majority do not know the output per employee increase or the value created per tool. Over 40% are measuring cost savings, and — **while the Larridin State of Enterprise AI data set** does not offer details on the sources of savings — process automation, supply chain optimization, code development speed, and content creation speed are all mentioned frequently in other reports of potential cost savings. The Larridin State of Enterprise AI survey asked which workforce AI-adoption metrics organizations actively track:

Money saved per project or team	40.9%
Percentage of workforce using AI tools	37.9%
Time saved per user per week	37.1%
Output per employee increase	33.5%
Compliance or risk incidents identified	32.7%
Value created per tool	32.1%
Model usage across business units	24.7%
AI-maturity level per function	19.5%
Investment per tool vs. benefit	16.8%
Delivery-speed improvement	13.5%

The data reveals a telling pattern: **organizations focus on what's easy to count (money saved, percentage using tools) rather than what matters most (maturity levels, investment-to-benefit ratios, delivery speed).**

Only 16.8% track investment per tool versus benefit — the core ROI calculation. Only 19.5% measure AI-maturity level per function — the foundation for targeted improvement. Only 13.5% track delivery-speed improvement — a direct measure of velocity impact.

Governance without the right metrics is governance theater.

Conclusions and Strategic Recommendations

The Reckoning Is Here

CFOs are tired of hearing about AI's "potential." Boards want proof. The data is clear:

1. Executive confidence is dangerously disconnected from operational reality.

The 16-point gap between C-suite and Director-level visibility claims means internal reporting is filtered before it reaches decision-makers.

2. Shadow AI isn't an edge case — it's the norm. Make AI alchemy through discovery.

With more than 75% of workers using personal AI tools, organizations can't see beyond sanctioned applications and are flying blind.

3. Tool diversity drives value, but creates complexity.

High-ROI organizations use 2.7 tools on average; low-ROI organizations use 1.1. But without visibility across the entire stack, optimization is impossible.

4. Governance isn't optional—it's the prerequisite for scale.

Organizations with formal policies are 2.2x more likely to demonstrate ROI. You can't measure what you haven't defined.

5. The productivity ceiling is real, but breakable.

85.7% of workers are stuck saving 10 hours monthly or less, while the top 6% save 20+. The path from floor to ceiling runs through proficiency measurement.

The Scout Approach

The leaders of 2026 will not be those with the biggest AI budgets. They will be those with the most accurate AI insights.

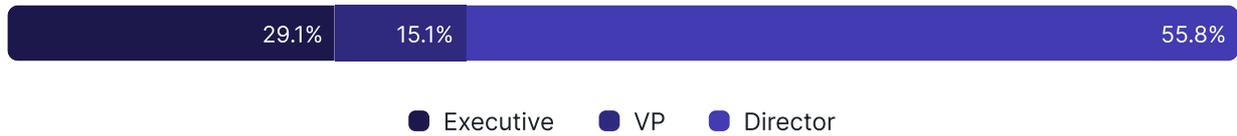
- **Stop trusting "claimed" visibility.** Self-reported surveys and vendor dashboards filter reality before it reaches you. You need measurement that operates at the desktop level, independent of what employees or vendors tell you.
- **Deploy independent measurement.** A platform like Larridin Scout provides ground-truth telemetry across all five pillars that define AI productivity: Governance, Velocity, Effectiveness, Quality, and Impact. Scout sees what's actually being used — not just what's licensed.
- **Move from utilization to proficiency.** Knowing that employees log into AI tools tells you nothing about whether they're capturing value. Measure skill development. Track the transition from micro-tasks to transformative workflows.
- **Connect usage to outcomes.** The 24.4% of organizations that admit they have "no correlation between AI usage and business outcomes" are tracking logins, not value. True measurement connects every tool, every task, and every team to business results.

Scout can show your enterprise what AI is being used, how AI is being used, how well people are using AI, and what the value AI is bringing to your business. Schedule a demo.

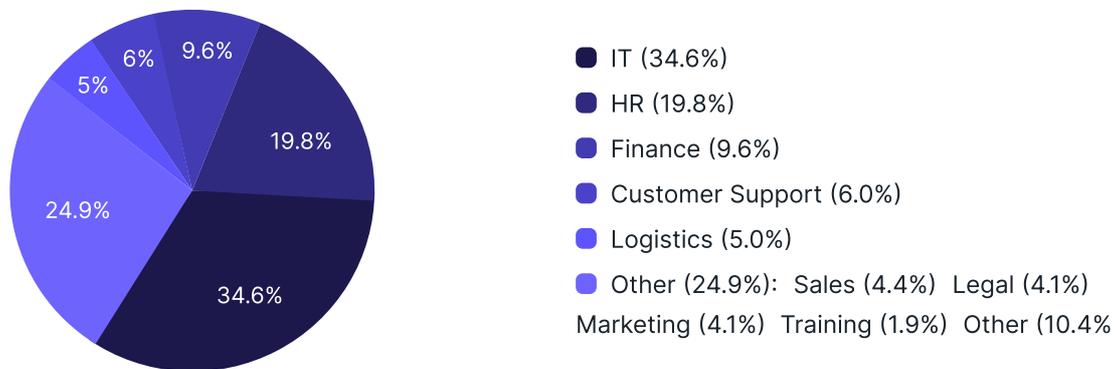
Methodology

This report is based on an independent survey of **364 enterprise leaders** conducted in December 2025-January 2026. Respondents represented:

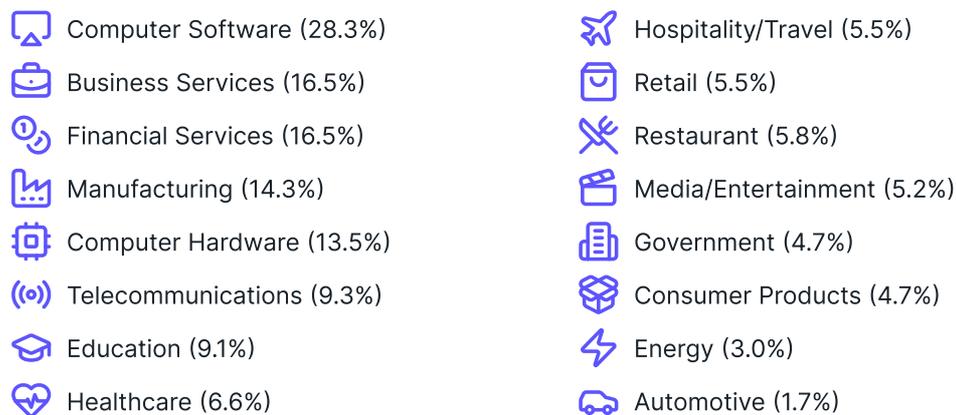
Seniority



Functions



Industries



Company Size



Third-party data is cited from Gartner, McKinsey, OpenAI, Cloud Security Alliance, KPMG, and other published sources as noted.

Research conducted by TrendCandy at the request of Larridin, January 2026

About Larridin

Larridin is the independent AI impact measurement platform — quantifying usage, proficiency, and impact across humans and agents, and enabling trusted AI governance at scale. Scout, our AI Productivity Measurement Platform, is fully configurable to your organization's structure, policies, and priorities — tracking the five pillars that define true AI productivity: Governance, Velocity, Effectiveness, Quality, and Impact.

Scout operates with a privacy-first architecture: zero data retention, no model training on your data, and AES-256 encryption. Measurement happens unobtrusively without disrupting the workflows you're trying to optimize.

For more information: larridin.com