I AM SPEAKING AT

Microsoft Ignite

NYC 2026

COMMUNITY SUMMIT



MICROSOFT REGIONAL DIRECTOR

IBM Consulting

Dr. Dave Goad

AI as a Platform

Business Models for Success in a New AI Lead World

Microsoft Ignite NYC 2026 COMMUNITY SUMMIT

NOVEMBER 16, 2026 | NEW YORK CITY

ignitenyc.github.io/2026

Who is talking

Dr. Dave Goad

Microsoft Regional Director · IBM Consulting

20+
years in IT

28
technical certifications
Microsoft · AWS · Google

PhD
in AI

Former CTO, IBM Consulting Australia



Scan to connect on LinkedIn

THE PARADOX

80%

say AI has made them more productive

37%

can point to any EBIT impact from AI

Personal gains are everywhere.
Enterprise value isn't.



Source: McKinsey, The State of AI (2026)

AI stalls on the operating model, not the technology

1

Business model

How value is created and captured

2

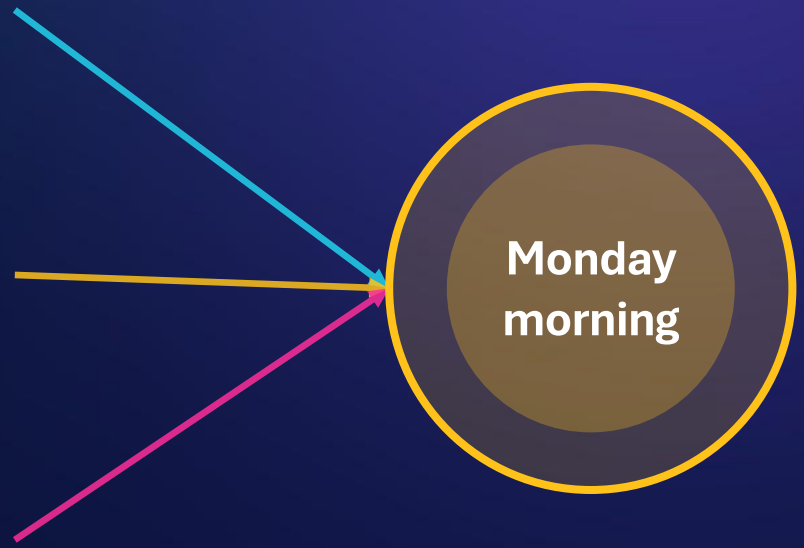
Process

How the workflow changes, with agents and humans in the loop

3

People and roles

Some roles go; most shift from doing the work to managing agents that do it



Argument of this talk

THEME 1 OF 6

The case for change.

Adoption is broad. Enterprise value is not.



Productivity is everywhere. Enterprise value is rare

MCKINSEY 2026: FROM INDIVIDUAL GAINS TO ENTERPRISE VALUE

80% report individual productivity gains → **44%** scale AI enterprise-wide → **37%** see any EBIT impact → **6%** are AI high performers

BCG 2025: ONLY 5% OF FIRMS ARE FUTURE-BUILT



Future-built firms: 1.7x revenue growth, 3.6x three-year shareholder return, 1.6x EBIT margin

IBM CEO STUDY 2025

25% of AI initiatives delivered the expected ROI

16% have scaled enterprise-wide

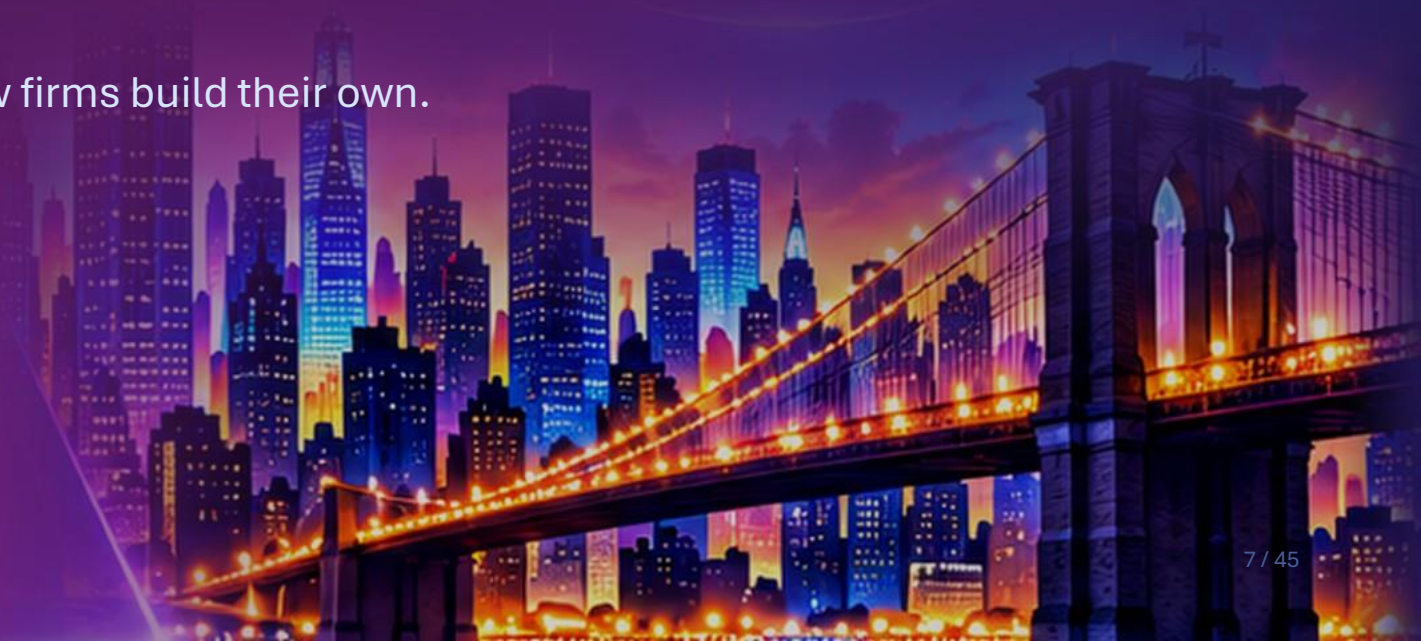
> Read the viral "95% of pilots fail" headline with care: it rests on 52 interviews and 153 leaders (MIT NANDA, preliminary). It shows a learning gap, not a failure rate.

Sources: McKinsey, The State of AI (2026); BCG, The Widening AI Value Gap (Sept 2025; 1,250 executives); IBM IBV, 2025 CEO Study (2,000 CEOs); MIT NANDA (July 2025, preliminary).

THEME 2 OF 6

The business model is changing.

Platforms, the ecosystems around them, and how firms build their own.



What is a platform? It enables value between producers and consumers

PIPELINE



The firm makes and sells. Value flows one way.

PLATFORM



The platform sets the rules and runs the infrastructure. Others create the value.

THE CORE INTERACTION

Participants
producers and consumers

+ Value unit
what is exchanged: a skill, plugin or agent

+ Filter
the catalogue and curation that match unit to user

Platforms invert the firm: strategy shifts from controlling resources to orchestrating outside ones.

PLATFORMS YOU ALREADY USE

Smartphone OS
iOS, Android: developers build apps, users get them from app stores

PC and office suite
Windows, Microsoft 365: ISVs and add-ins build on top

Cloud
Azure, AWS: partners sell through marketplaces

AI, next
Agents, skills and plugins: the same pattern

Sources: Parker, Van Alstyne and Choudary, Platform Revolution (2016); Van Alstyne et al., HBR (2016). IT examples are the speaker's illustration.

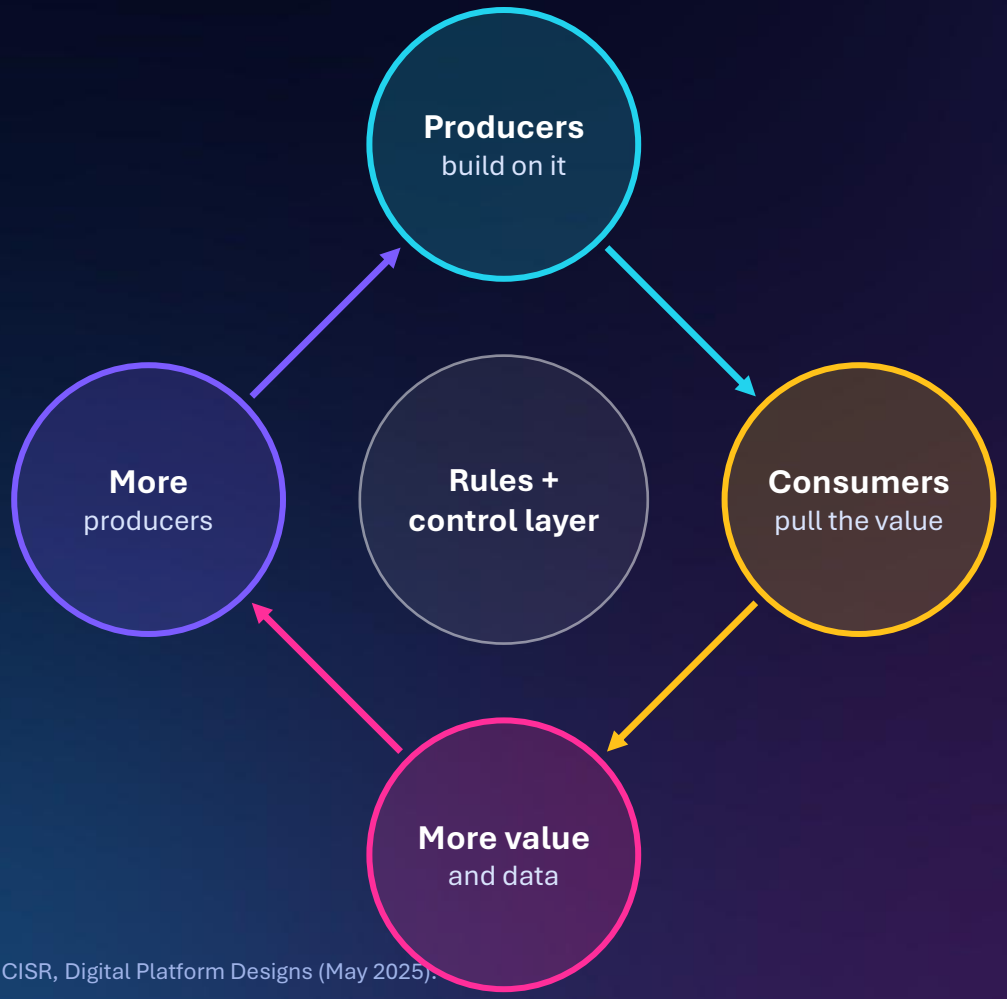
Network effects are the engine. Curation keeps them positive

	SAME SIDE	CROSS SIDE
POSITIVE	Users sharing skills and prompts make every user's agents better	More builders attract users, and more users attract builders
NEGATIVE	Agent and skill sprawl: duplicates compete for attention	Low-quality or unsafe plugins erode trust on both sides

The lever: curation. Quality curation raises the odds of a good match and shrinks the negatives.

Sources: Parker, Van Alstyne and Choudary, Platform Revolution (2016), via book summaries. AI examples are the speaker's synthesis.

A platform wins by what others build on it



- **Producers build on it**
- **Consumers pull value from it**
- **Rules and a control layer keep it trusted**

Source: MIT CISR, Digital Platform Designs (May 2025).

Microsoft is building a platform at every layer

SURFACE

Microsoft 365 Copilot · Cowork
where people work and delegate tasks

EXTEND

Skills and plugins
reusable instructions plus connectors; partner plugins from LSEG, Moody's, S&P Global and more

BUILD

Agent Builder · Copilot Studio · Foundry · GitHub Copilot CLI
no-code, low-code and pro-code paths; CLI plugins install from marketplaces

DISTRIBUTE

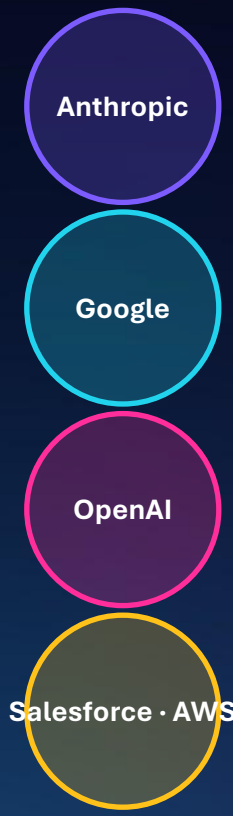
Agents and Plugins · Agent Store · Marketplace
one place to discover agents, skills and connectors

GOVERN

Agent 365 · Entra Agent ID
observe, govern and secure every agent

Sources: Microsoft 365 blog; Microsoft Tech Community (Oct 2026); GitHub Copilot CLI guide (secondary). Verify names on microsoft.com.

Every AI provider is building a store, a standard and a control plane



Claude plugin directory and marketplaces
Knowledge Work by default; Financial Services and Legal on request; private organisation marketplaces

Gemini Enterprise Agent Gallery
partner-built agents from Accenture, Atlassian, Deloitte, Oracle, Salesforce, ServiceNow, Workday and more

ChatGPT app directory and Apps SDK
third-party apps and services inside ChatGPT

AgentExchange · AWS Marketplace
AgentExchange merges three stores, 13,000+ apps, agents and components (Forrester); AWS lists AI agents and tools

Same pattern everywhere: a catalogue, an open standard (MCP, A2A) and admin control. Trade-off: easy to buy, harder to leave.

Sources: Anthropic (support.claude.com); Google Cloud blog; Forrester on AgentExchange; Kanerika and Noqta (secondary) for AWS and OpenAI. Counts as reported; verify before quoting.

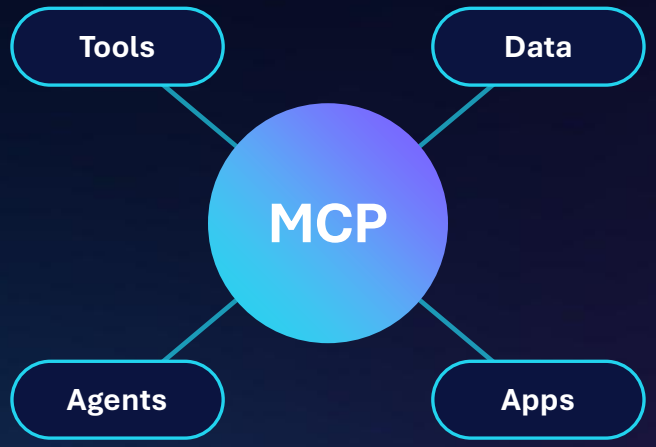
Plugins turn the stack into a two-sided market



Plugin = skills + connectors, packaged as a standard Microsoft 365 app. Claude and Open-Plugin packages convert automatically.

Sources: Microsoft product documentation (Agent Store, plugins). Partner list per Microsoft announcements; check the store for current listings.

Every platform needs an open standard and a control plane



Open standard

Model Context Protocol connects agents to tools, data and apps.

It now sits under the Agentic AI Foundation (Linux Foundation), founded by Anthropic, Block and OpenAI. Microsoft, AWS and Google are members.

CONTROL PLANE

Agent 365 + Entra Agent ID: every agent has an identity, an owner and a policy

Registry	Access control	Visualization	Interoperability	Security

Sources: Agentic AI Foundation (Linux Foundation) and Microsoft Agent 365 documentation. Verify current membership and release notes.

Businesses are building their own marketplaces for agents and skills



Envoy

Proven agents published to an internal Agent Marketplace; reused across Halifax and Bank of Scotland



AI City

Employees build agents; most marketplace solutions are employee-made, then tested, screened and deployed



Eliza

20,000+ employees have built agents on the platform



Opening outward

Stock-plan platforms opened to clients' own AI agents; 3,400 administration clients planned



The marketplace is where quality, ownership and cost get governed.

Sources: Fintech Times and ResultSense (Lloyds); ing.dk (Danske Bank); OpenAI customer story (BNY); Retail Banker International, citing CNBC (Morgan Stanley). Verify against company sources.

Internal marketplaces mature from reactive to proactive

1 REACTIVE

Employees innovate on their own

Bottom-up, ad hoc, little reuse; sprawl and duplication

2 CURATED

A governed catalogue

Verified, tagged, versioned agents that others can find and reuse

3 PROACTIVE

Strategy steers the supply

Leaders set priority outcomes, fund them and reward builders

WHAT MAKES ONE SUCCEED

Governance before publish

Security, compliance and data checks are a gate, not an option

Easy to find and trust

Tag by function and risk; show usage and feedback

A reason to build and share

Licensing or revenue share, ranked by usage

Someone owns curation

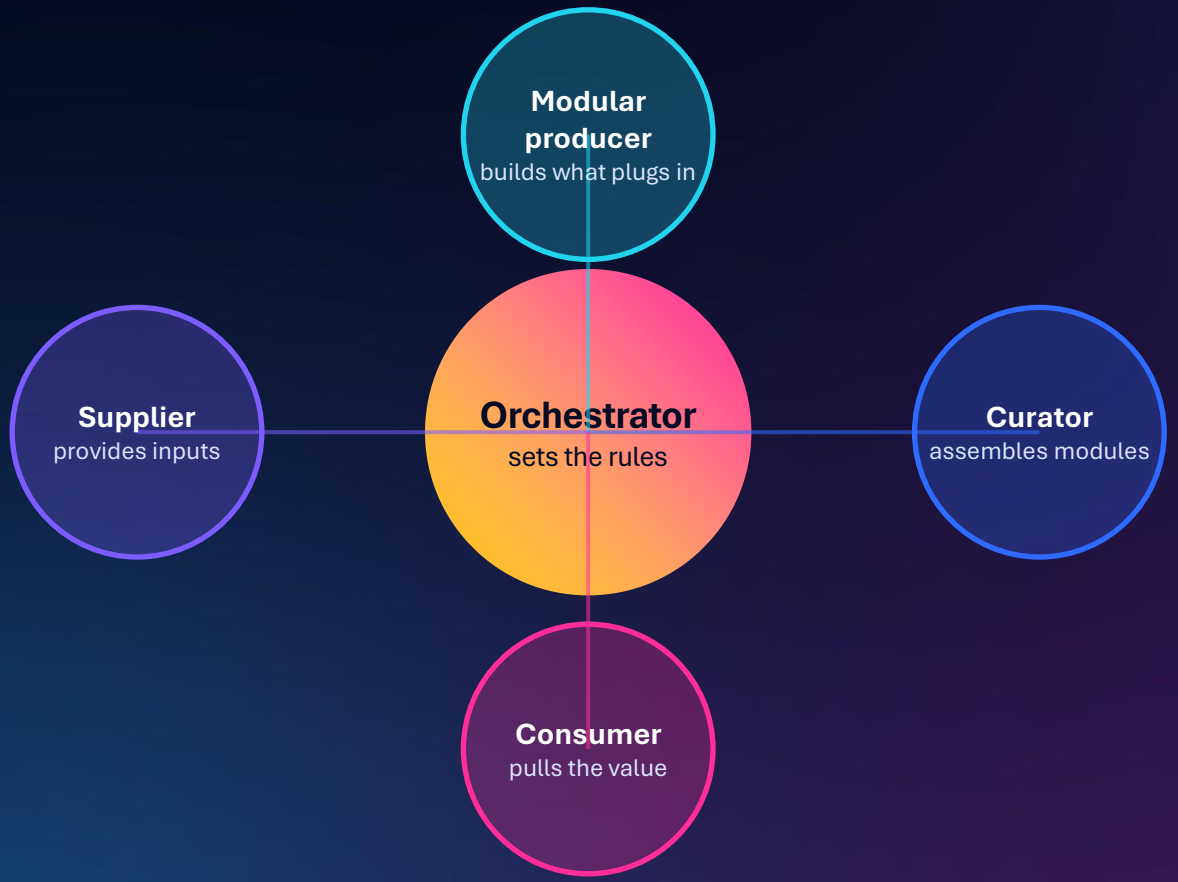
A dedicated team features the best and retires the rest

Reusable and interoperable

Modular agents, not tied to one vendor stack

Sources: Deloitte, Scaling AI agents; Insight (Stagwell Agent Cloud); Infosecurity Magazine (Lloyds). Stage model is the speaker's synthesis.

Roles in a platform ecosystem: orchestrator, producer, supplier, curator



WHAT A PRODUCER MUST DO

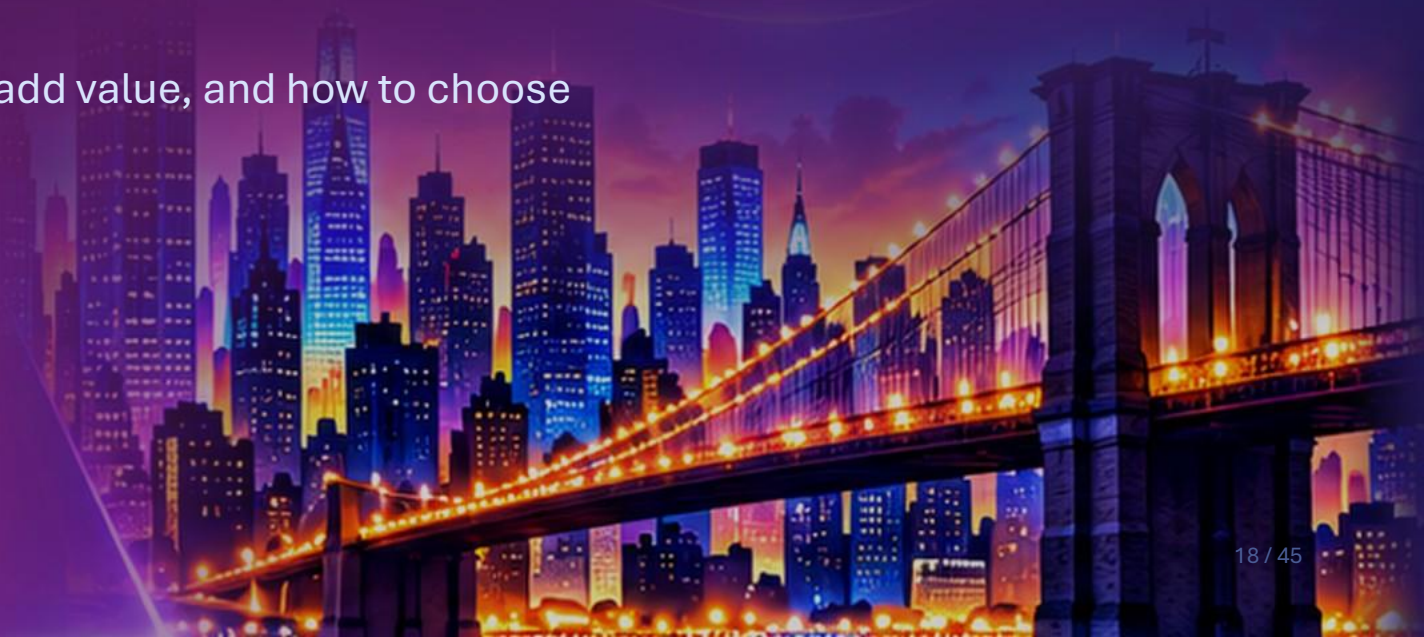
1. **Keep innovating**
   it can be swapped out of the platform
2. **Stay connectable**
   easy to plug in and integrate
3. **Build a brand**
   customers rely on the orchestrator to curate

Modular producers rank second only to orchestrators on revenue growth and profit (MIT CISR).

Sources: MIT CISR (2018 Ecosystem Driver; 2019 Modular Producer briefings; 2025 AI-era models); Umbrex, Ecosystems and Platforms (practitioner summary, secondary).

Platform is one path of several.

Alternative business models to the platform that add value, and how to choose between them.



Alternative business models to the platform that add value, and how to choose between them

PLATFORM

Others build on you

Fits when you can attract producers and consumers and set the rules

e.g. Microsoft 365 Copilot and Agent Store

DATA ASSET

You own data others cannot get

Fits when the data is unique, rights are clear and buyers exist

e.g. licensed or API data products

MODEL ASSET

Your data tunes a commodity model

Fits when a specialised domain and your evals beat a generic model

e.g. fine-tuned vertical models

EMBEDDED AI

AI inside what you already run

Fits when you already own the customer and the workflow

e.g. MIT CISR "Existing+"

They are not exclusive. Most firms combine two or three.

Synthesis, informed by MIT CISR (Oct 2025) and Berkeley California Management Review (Feb 2026). Illustrative, not a research taxonomy.

Data as the asset: a moat only if it learns

#1

priority for tech leaders in 2026 is value from data and AI. Data monetisation was #6 of 7 in 2023.

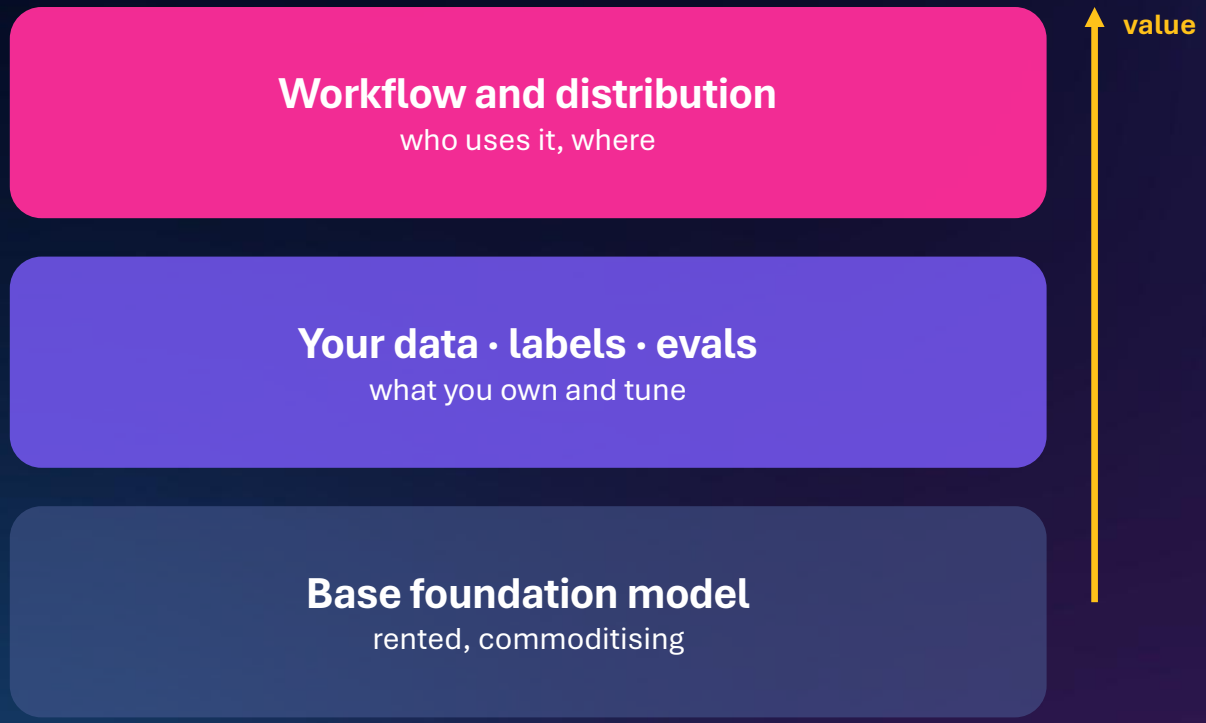
THREE ROUTES

- **License it** — to model builders or partners
- **Productise it** — as a data product or API
- **Use it** — inside your own workflows

Start with the buyer, not the asset. More data is not a moat on its own. A moat is behavioural data that feeds a learning loop competitors cannot copy.

Sources: Deloitte 2026 Global Technology Leadership Study (662 C-suite leaders); Strategy Stack (Jan 2026, secondary); HatchWorks citing a16z (vendor blog).

Model as the asset: the base model commoditises, your tuning compounds



THREE PLAYS FOR OPEN MODELS

1 **Infrastructure**
secure, managed deployment

2 **Customisation**
your data in niche models, premium service

3 **Feature**
AI inside an existing product

Test: swap the model. What survives? Context, evals and memory.

Sources: Berkeley California Management Review, The Free Lunch Dilemma (Feb 2026); HatchWorks and Context.ai (vendor blogs, secondary).

Embedded AI: put AI inside what you already own

One New Zealand

MIT CISR CASE

Most AI initiatives sit in Existing+: AI-supported processes that help customers reach outcomes

Thomson Reuters

COCOUNSEL

AI embedded in existing research, drafting and compliance software; 1 million professionals in 107 countries (company-reported)

Intuit

QUICKBOOKS

A bolted-on chat assistant flopped; agents that remove manual toil inside existing workflows worked (secondary report)

FITS WHEN

You already own the customer, the workflow and the data, and the gain is lower cost, speed or better outcomes inside today's model.

WATCH OUT

It can become a feature others copy. With no ecosystem effect, advantage must come from workflow depth and your own data.

Sources: MIT CISR, Business Models in the AI Era (Oct 2025); CFOtech and LawNext (Thomson Reuters, company-reported); CO/AI on Intuit (secondary). Fit and risk are the speaker's synthesis.

THEME 3 OF 6

Realign the business model.

Which AI-era model fits you, and whether to build or buy.



MIT CISR: four AI-era business models, and ecosystems pull ahead

↑ ACTS FOR THE CUSTOMER

Customer Proxy

Acts for customers through predefined processes

Orchestrator

AI assembles an ecosystem around the outcome

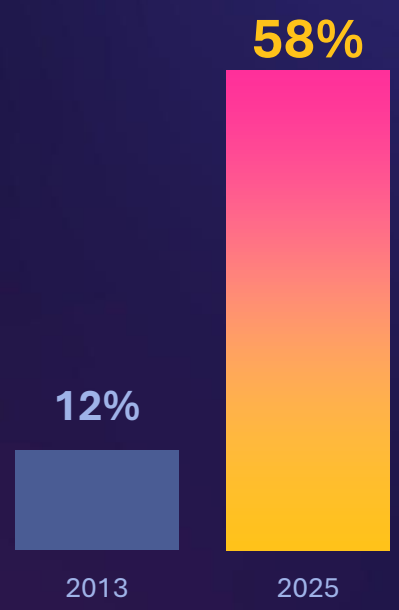
Existing+

AI augments what you sell today

Modular Curator

AI assembles modules, partners' too

PREDEFINED PROCESS → AI-ADAPTIVE



Share of firms running as ecosystem drivers.

The only digital model with above-average revenue growth.

Sources: MIT CISR, Business Models in the AI Era (Oct 2025); Ecosystem Driver share 12% (2013) to 58% (2025) and above-average growth per CISR data.

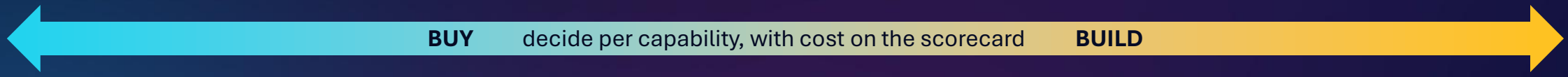
Build vs buy is flipping both ways, and cost is the new constraint

32%

decided against buying software because they could build it with agentic coding tools

1 in 5

limit AI use because of operating cost



Source: McKinsey, The State of AI (2026): 32% decided against buying software they could build with agentic coding tools; about 1 in 5 limit AI use because of operating cost.

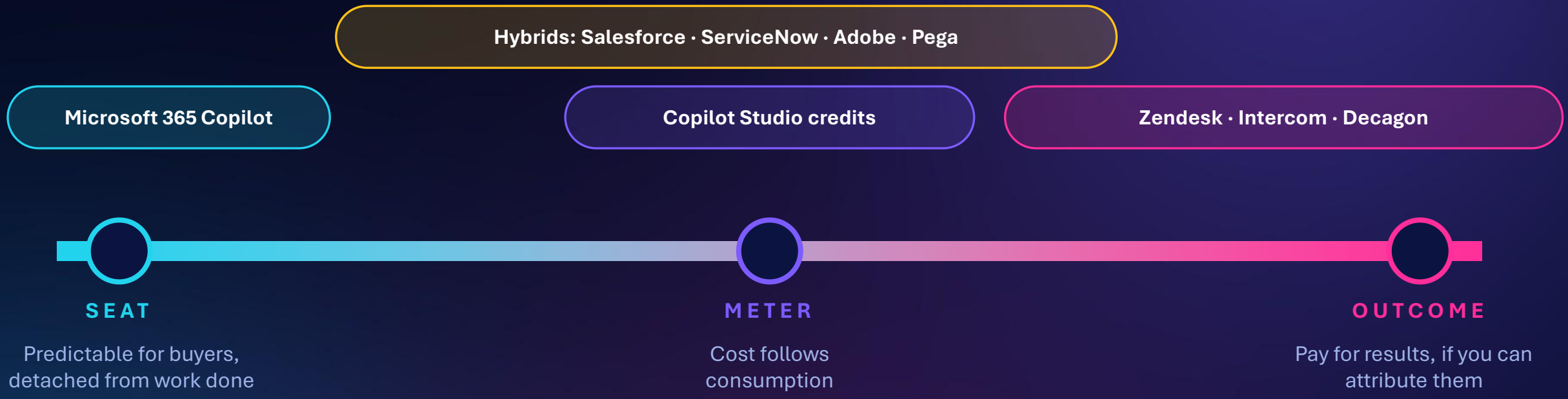
THEME 4 OF 6

From assets to outcomes.

How pricing and value capture move from seats to usage and results.



Pricing is moving from seats to meters to outcomes



The market is not choosing one model. Expect hybrids for years.

Sources: Deloitte TMT Predictions 2026; Gartner (July 2026); vendor pricing pages. CIO.com notes attribution makes pure outcome pricing hard.

Service-as-software: the investor thesis



$300B
annual SaaS revenue

INVESTOR THESIS

The next big software company sells the outcome of the work, not seats.

The prize is labour spend, not software spend.

Sources: a16z (LP Summit, summary) and Sequoia (March 2026), via secondary summaries. An investor thesis, not settled fact.

THEME 5 OF 6

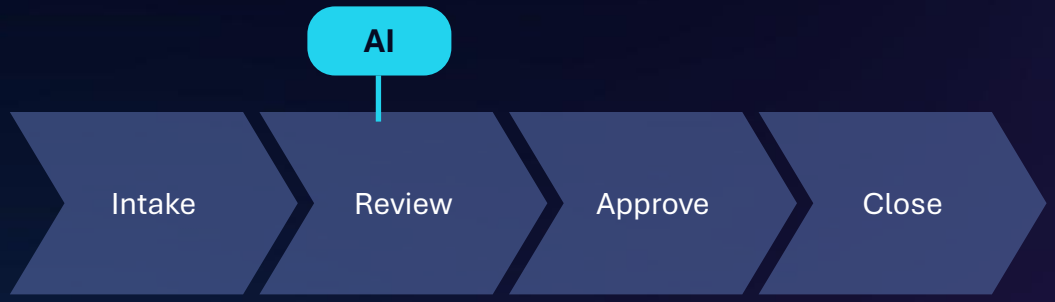
Redesign the process.

Bolt-on AI captures little. Redesigned workflows capture the value.



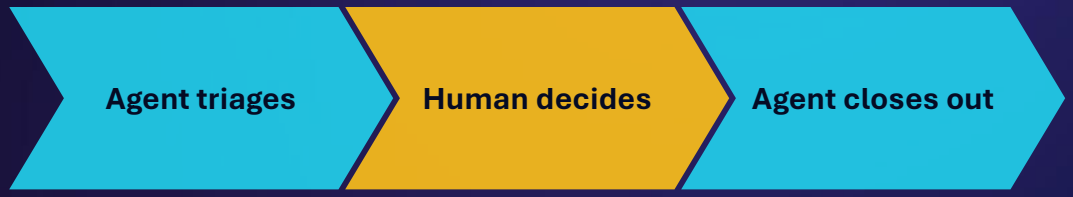
The winners redesign the workflow. They don't bolt AI on

BOLT-ON



AI added to one step of the old process

REDESIGNED



Work rebuilt around what each does best

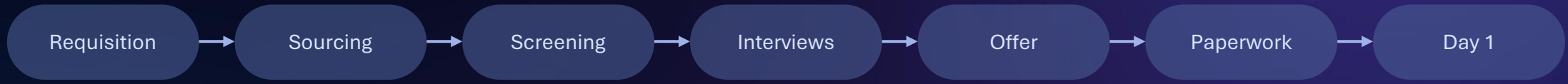
2.8x

High performers were 2.8x more likely to have fundamentally redesigned workflows (55% vs. 20%)

Source: McKinsey, The State of AI (2025 and 2026): high performers fundamentally redesign workflows (55% vs. 20% of others).

Redesign the whole flow: hire-to-onboard, before and after

BEFORE



AFTER (agent = cyan, human checkpoint = yellow)



Fewer hand-offs, clear accountability, and a person at every decision that matters.

Illustrative example of the end-to-end hire-to-onboard redesign described in McKinsey, The agentic organization.

McKinsey: redesign five things together, not one



Redesign all five together

Embed control agents in workflows, as DevSecOps embedded automated checks.

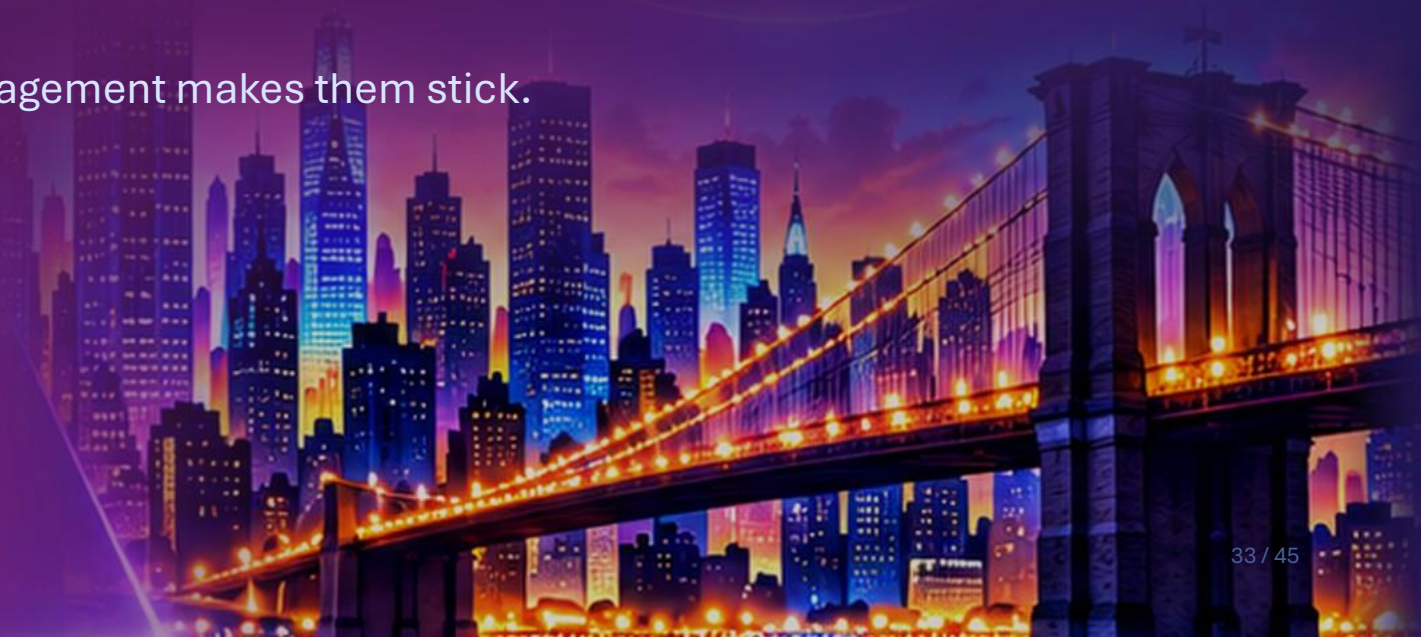
McKinsey's own example: reimagine hire-to-onboard end to end.

Source: McKinsey, The agentic organization: contours of the next paradigm for the AI era.

THEME 6 OF 6

Redefine the roles.

New processes need new roles, and change management makes them stick.



People are ready; the system is not. Change management closes the gap

45% say it is safer to stick to current goals than to redesign work

13% say they are rewarded for reinventing work with AI

16% of AI users are "Frontier Professionals"

FIVE THINGS TO DO ABOUT IT

1. **Sponsor from the top**
   High performers have senior leaders who own the AI agenda (McKinsey)
2. **Change the scorecard**
   Reward redesign, not only results: Frontier 26% rewarded vs 11% for others
3. **Make managers the change agents**
   Managers who model AI use: 17-point lift in perceived AI value
4. **Create safe space to experiment**
   Psychological safety: up to 20 points higher AI readiness
5. **Teach when to use AI, and when not**
   Frontier professionals pause to decide AI vs human: 53% vs 33%

Source: Microsoft, 2026 Work Trend Index (20,000 AI users; self-reported associations, not causal); McKinsey, State of AI 2025. Figures as published by Microsoft.

BNY: platform first, people second, automation last

1

Platform first

Eliza: a model-agnostic AI platform.
20,000+ employees now build agents on it.

2

People second

AI training for nearly all staff before digital employees arrived.

3

Automation last

130+ digital employees with logins, email addresses and human managers.

A Digital Employee Agency decides when a problem warrants a digital employee rather than a human hire. BNY still hires thousands each year.

Sources: Forrester; Microsoft WorkLab (BNY case study); OpenAI customer story (BNY). Counts as publicly reported by BNY and partners.

The org chart gets new boxes



= an AI agent, with a named human owner

54% of CEOs are hiring for AI roles that did not exist a year ago

Sources: Microsoft Work Trend Index 2025 (agent boss, human-agent ratio); IBM IBV 2025 CEO Study (54% hiring for AI roles that did not exist a year ago).

The junior-talent question: who learns the craft?



13%

relative employment decline for 22 to 25-year-olds in the most AI-exposed jobs since generative AI took off

Experienced workers in the same jobs held steady or grew.

Declines concentrate where AI automates rather than augments.

Design the apprenticeship: let agents do the reps, and have juniors learn by supervising them.

Source: Brynjolfsson, Chandar and Chen, Canaries in the Coal Mine? (Stanford Digital Economy Lab, Aug 2025). Descriptive evidence, not proof of cause.

Your Monday-morning playbook: one move per theme

1

Make the case

Show the gap between AI use and P&L value in your firm

2

Choose your business model

Platform, data, model or embedded AI: where does your advantage live?

3

Align to the new model

Reshape partners, assets and build versus buy around your choice

4

Focus on outcomes

Price, meter and measure on results, not seats or hours

5

Redesign the work

End to end, one owner per agent, under a control plane

6

Lead the change

Sponsor, scorecard, managers, safe space, skills

Synthesis of the evidence in this talk.

If you lead. If you build.

IF YOU LEAD

- Fund workflows, not pilots
- Change the scorecard to reward redesign
- Decide where agents replace a hire

IF YOU BUILD

- Treat plugins and agents like products: owner, tests, versions
- Design for identity, logging and rollback
- Instrument cost per outcome

Same destination: workflows that run on agents, with humans accountable.

Synthesis of the evidence in this talk.

Platforms win by what others build on them. So will organisations.



Dr. Dave Goad

Microsoft Regional Director · IBM Consulting

Questions?

Microsoft Ignite NYC 2026 Community Summit

ignitenyc.github.io/2026

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Cowork, Agent Store, Agent 365 and MCP statements: Microsoft product documentation and Agentic AI Foundation announcements; verify current release notes. Omdia and Forrester studies were commissioned by Microsoft.