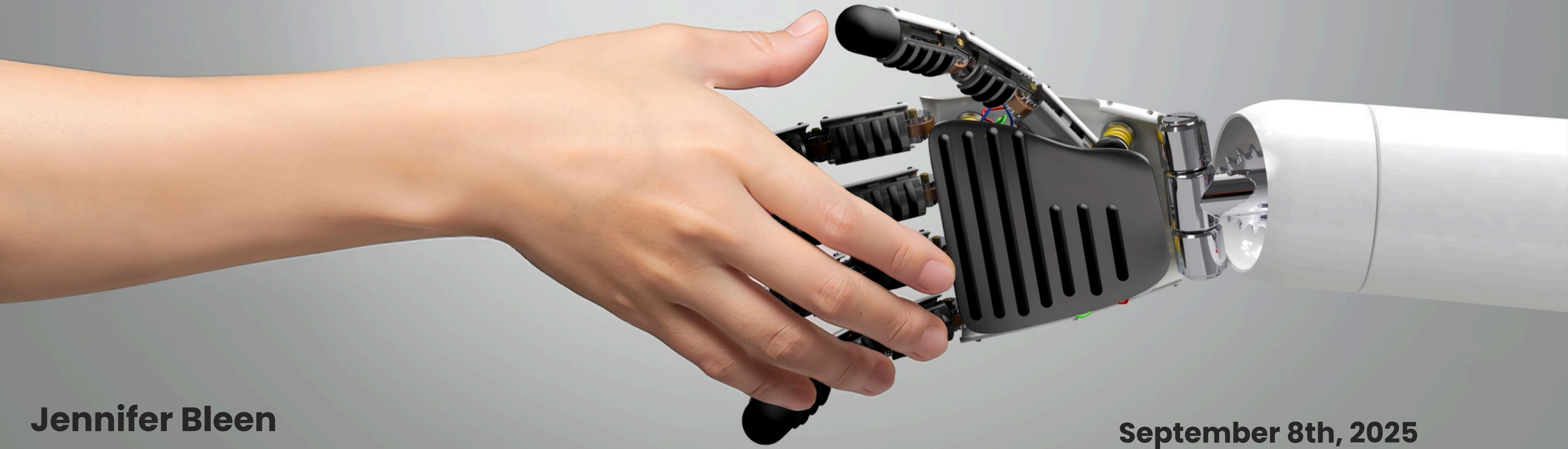
From Tools to Teammates:

Building Trust and Harmony Between Humans and AI Agents



Jennifer Bleen

Nilanjan Raychaudhuri, Founder, Tublian

September 8th, 2025

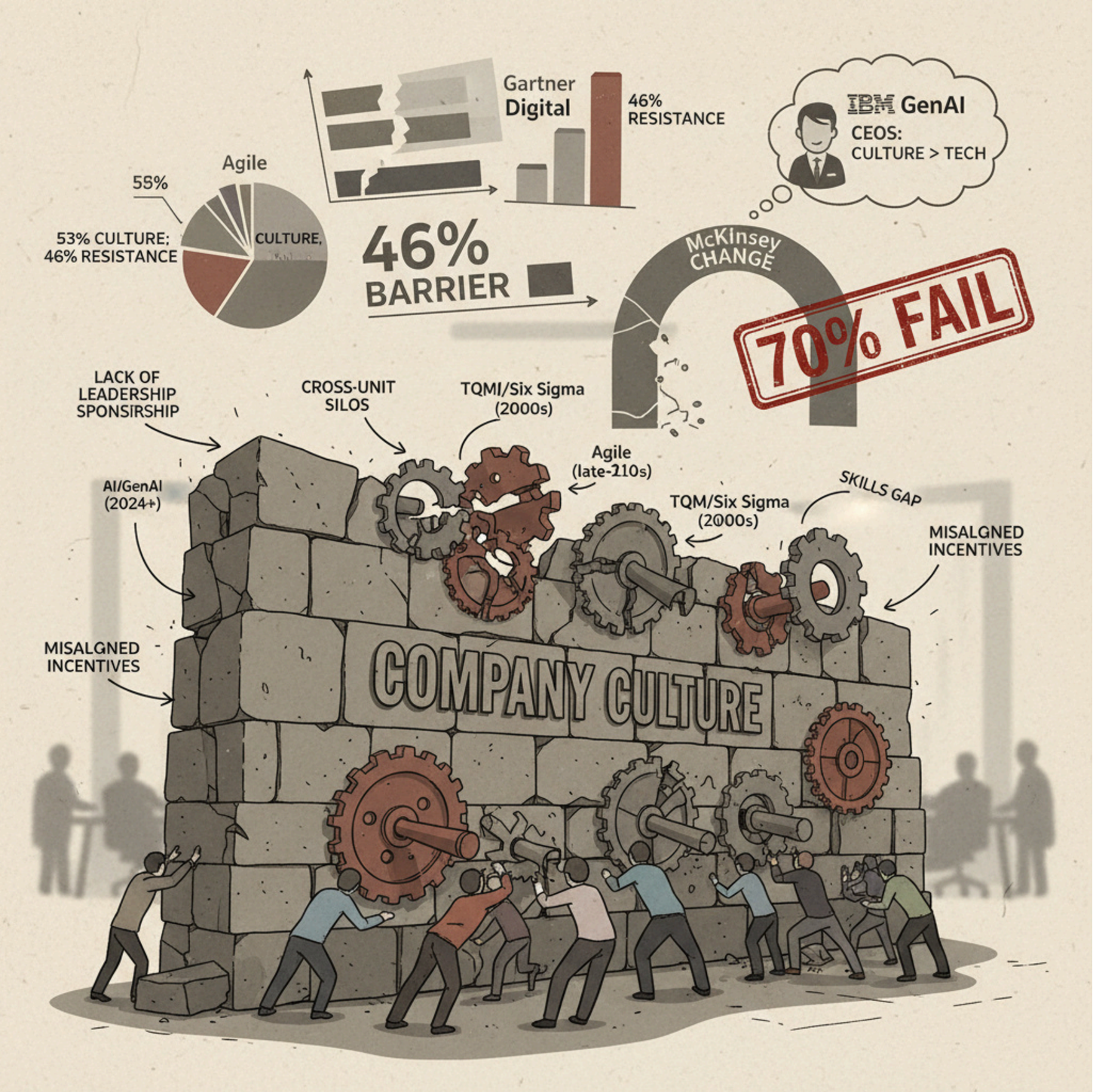
The Promise vs. Reality Gap

Show of hands: How many of you have seen an AI demo that blew your mind... then watched it fail spectacularly in the real world?

The $2 Trillion Question

BNY Mellon manages $2 trillion in assets with their AI agent "Eliza" achieving 96% employee adoption.

Meanwhile, most AI initiatives fail at the cultural level - just like Agile transformations did a decade ago.



What have we learned over the past several decades?

Changing Culture is Hard!

COMPANY CULTURE: THE UNDERLAYING BARRIER TO BUSINESS TRANSFORMATION

1990s

1990s (BPR)

FAILURE RATE:
Up to 70%.
CULTURAL FACTORS
Core Cause.

Covert (1995)

2000s

1990s-2000s (TQM)

75%

IMPLEMENTATION PROBLEMS.
LINK FAILURE TO ORGANIZATION CULTURE.

Eniola et al. (2019). PMC, ScienceDirect

2000s

2000s (Sigma /Lean Six Sigma)

TOP FAILURE
Resistance to change,
No Mgmnt Support,
Poor Communication,
Inappropriate Rewards.

Antony et al (2020) IEEE,

2010s

2010s (Agile)

OBSTACLES
Agile at Scale

Org. culture at odds with agile (53%), Resistance to change (46%), Inadequate Mgmnt Support (41%).

13th State of Agile report (2018-2019)

2010s

2010s-2020s (All Enterprise Transformations)

70% of Enterprise Transformation Barriers are EMPLOYEE RESISTANCE and Lack of Management support.

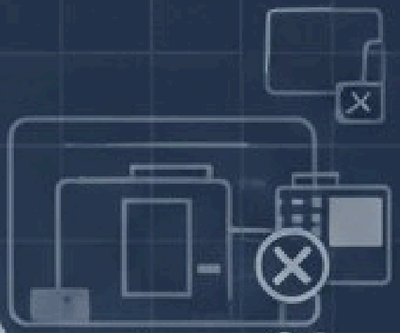
McKinsey (2015, 2019)

2020s

2018 (Digital Transformations)

SUCCESS is <30%.
LACK OF
Leadership Commitment, Workforce capability, and People Empowerment to work in new ways.

McKinsey (2018)



2024-2025 (AI/GenAI)

57% of CEOs say CULTURAL CHANGE is MORE IMPORTANT than overcoming technical challenges to become data driven.
Tech is changing faster than people can adapt. (64%)

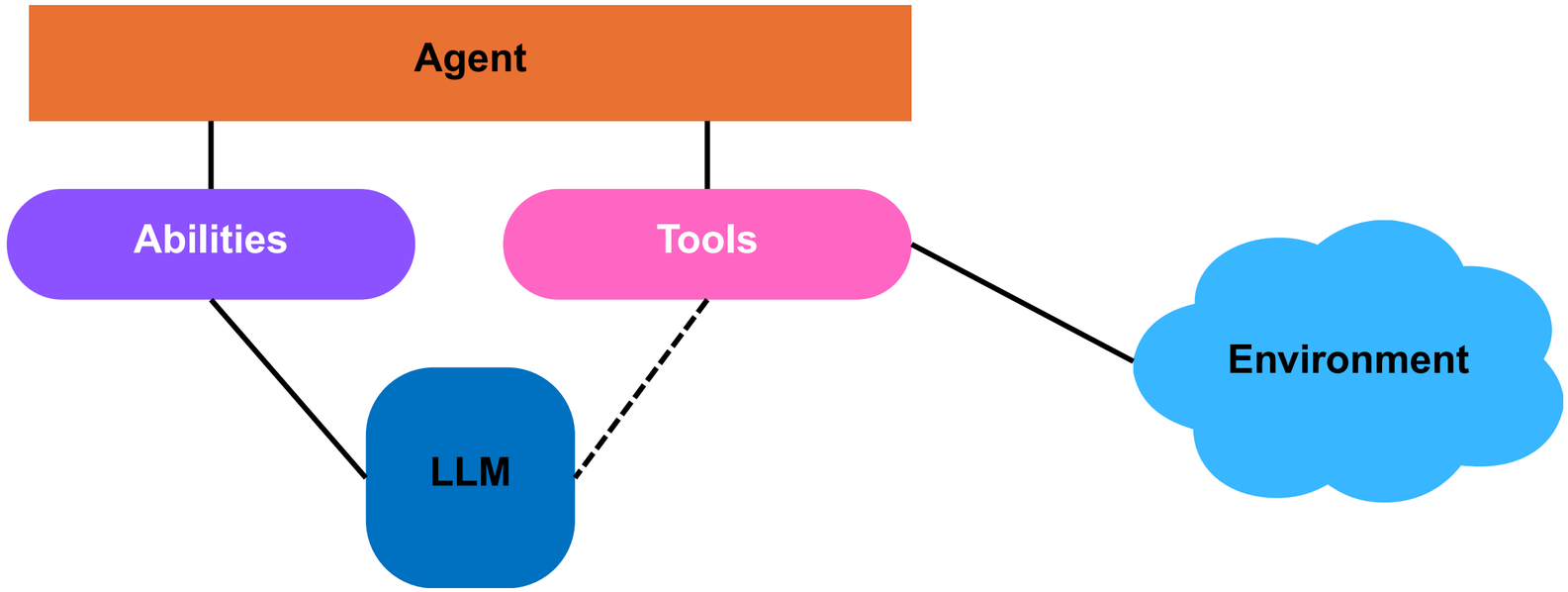
IBM Newsroom (2024)

What if we stopped fighting culture… and started hiring into it?

Meet your new Remote Employee: AI Agent

What Exactly is an AI Agent?

AI agents are autonomous systems that perceive the environment, process information, and take actions to achieve specific goals.



Types of Agents

Reactive Agents: Responds to an external stimulus.

Proactive Agents: Anticipates future states & takes action.

Core Traits of Agents

- Autonomous agents can make decisions within guardrails
- Goal-directed agents works toward outcomes, not just outputs
- Action-capable agents executes tasks across apps, not just conversations

Where a chatbot gives you answers, an AI agent can act on it (book the meeting, update the CRM, and send the follow-up email)

Don’t just deploy AI Agents.

Hire them as a remote AI Employee

Define the Role

The Job Description

Human Employee

- Lists clear responsibilities, required skills, and expected outcomes.
- Align with org chart, team dependencies, and career ladders.
- Focus on skills and experience

AI Agent Employee

- Define learning objectives, use cases and task scope and boundaries
- Security/Risk/Input/Output
- Specify interaction model: always-on assistant vs. on-demand tool vs. autonomous agent.
- Place in org-chart role with a human manager (Human in the Loop)

“Design jobs around outcomes, not just tasks. In a world where AI is increasingly capable, human-AI collaboration should be anchored in shared goals, not fragmented duties.”
— Accenture, Future of Work Report (2023)

The Ideal Candidate (Persona)

Human Employee

- Define behavioral traits (e.g. MBTI, DiSC, Strengths Finder) for cultural fit and retention.
- Define success factors such as clarity, communication, collaboration, motivation

AI Agent Employee

- Define AI Agents persona using tone, logic style, pacing, explainability, and collaboration behaviors
- Define success factors such as response consistency, confidence thresholds, chain of thought transparency

“The most successful teams are not made by assembling the most talented individuals, but by assembling the most compatible personalities and communication styles.”
— Google Project Aristotle

Screening and Vetting

The Screening

Human Employee

- Resume and/or portfolio review
- Behavioral interview to assess team fit
- Skills assessments
- Reference checks

AI Agent Employee

- Technical Spec (Frameworks, LLMs) including training data transparency, model architecture, plugins or API access
- Test prompt responses and evaluate hallucination rates and tool invocation success especially with edge cases.
- Pilot AI Agent

“If we don’t test technology under pressure, it will fail us in the moment we need it most.”
— Dr. Timnit Gebru, AI ethicist and researcher

Hiring Decision and Access Provisioning

The Hiring Decision

Human Employee

- Ranking of candidates
- Final consensus and selection meeting
- Issue offer letter

AI Agent Employee

- Capability, persona, and integration score review
- Governance, compliance, risk controls approval
- Pricing structure, usage limits, training data, feedback loops

“Hiring isn’t just a skills match. It’s a bet on trust, fit, and future value. That’s true whether the new hire has a heartbeat or a heartbeat emulator.”

— Jennifer Bleen, Matrix Intelligence Limited

The Provisioning

Human Employee

- Add to payroll & HRIS
- Set up email, Slack, project access
- Provision laptop, VPN, etc.

AI Agent Employee

- Use role-based access controls (RBAC) and zero-trust architectures
- Integrate with data systems, set access permissions to relevant tools
- Use vector databases or API gateways to mediate access
- Implement audit trails, rate limits and error capture systems

“Access provisioning acts as a security foundation, ensuring only authorized individuals can access specific information when needed.”
— Sethu Meenakshisundaram, Co-Founder of Zluri, January 16, 2025

Onboarding and Training

The Onboarding

Human Employee

- Orientation sessions
- Meet the team
- Learn tools, processes, org values
- 30-60-90 day training and ramp-up goals established
- Often start with shadowing

AI Agent Employee

- Inject with core values (ethics/tone)
- Context Engineering: Fine-tune or embed company-specific knowledge
- Upload style guides, tone documents, workflow rules
- Run through instructional prompt scaffolding and retrieval tuning
- “Shadow mode” — AI agent drafts but humans review before sending

“Even the smartest AI is only as effective as the environment we prepare for it. Culture isn't just for humans.”

— Satya Nadella, CEO of Microsoft

Performance Evaluation

The Performance Evaluation

Human Employee

- 30/60/90 day reviews
- Manager feedback
- Peer reviews and 1:1s
- Career development coaching

AI Agent Employee

- Monitor performance, usage and trust metrics
- Measure quantitative metrics
- Collect and analyze qualitative metrics

“What gets measured gets improved — but only if we’re measuring what actually matters.”
— Peter Drucker

Ongoing Management and Calibration

The Ongoing Monitoring

Human Employee

- Quarterly, bi-annual, annual reviews
- Pulse surveys or formal 360 feedback
- Ongoing compliance training
- Culture building
- Escalation paths
- Professional development

AI Agent Employee

- Continuous monitoring and tracking of agent effectiveness
- Feedback loop from humans
- Alignment and drift detection, Security and privacy scans, and error flagging protocols
- Routine model task relevance review, updates, retrains, and offboard

“Building trustworthy AI agents isn’t about better algorithms; it’s about engineering a system of monitoring, control, and verifiable reliability around them.”

— Adnan Masood, AI Architect and Practitioner

Why Treating AI Agents as Employees Works

Why Humans + Agents?

Gain Cognitive Diversity Benefits

Context, creativity, emotional intelligence

+

Pattern recognition, consistency, scale

=

Enhanced decision-making quality

- Microsoft research shows human-AI teams outperform either humans or AI alone in complex problem-solving by 23%
- BNY Mellon's 96% adoption rate shows successful augmentation, not replacement
- OpenAI's Three Criteria for AI Agent Implementation:
  - Complex decision-making requiring nuanced judgment
  - Difficult-to-maintain rule systems
  - Heavy reliance on unstructured data

“Organizations who design systems are constrained to produce designs which are copies of the communication structures of these organizations.”

— Melvin Edward Conway, in his paper “How Do Committees Invent?”, Datamation, April 1968

Conway’s Law: Why AI Agents Fit AND Still Change Us

Decades of failure trying to change the organization to fit the system

- Forced reorgs → cross-functional squads
- Cultural rewiring → command → collaboration
- High failure: 70% stalled
- Changes = structural & cultural

Time to let the system adapt to the organization

- Plug into existing hierarchies & workflows
- Fit as copilots, assistants, ecosystems
- Lower adoption friction
- Changes = governance & skills (second-order shifts in roles, metrics, guardrails, reskilling)

📌 *Just like its business transformation predecessors, Agile demanded structural change. AI agents avoid reorganizations. However, they do require new forms of change: second-order shifts in how we manage, measure, and grow with digital teammates.*


Induced Demand

Labor is becoming a scalable utility: plug-in, power up & produce


Era of
abundant
Intelligence

Increased supply of intelligence will create demand for tasks require intelligence

The Second-Order Changes Required for Co-Existence

Trust is the Accelerator (Not a Soft Skill)

Employees won’t use what they don’t trust.

Adoption, productivity, and creativity rise when workers trust an agent’s intent, capability, and oversight.

Be clear on what the agent can and cannot do

Start with small, consistent wins

Design human-in-loop recovery & error handling

Use explainable AI and visible decision logs

Define agent roles like teammates, clarify expectation

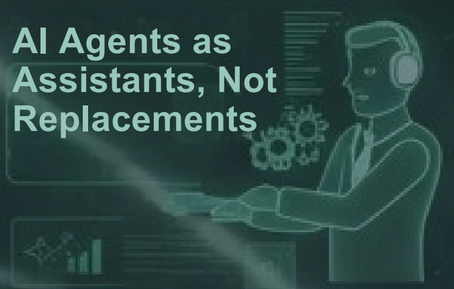
Publish ethics, escalation, and governance

Unlike Agile or other transformations, AI agents touch daily work immediately.
That makes trust-building a prerequisite

Psychological Framework - The Five Core Needs

AUTONOMY

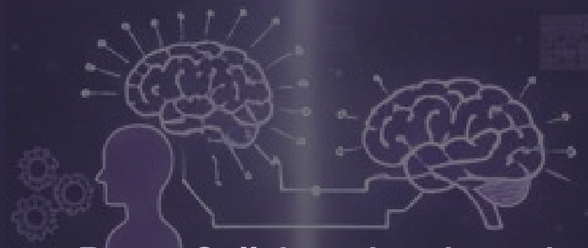
AI Agents as Assistants, Not Replacements



SECURITY

Predictable partnership, not uncertain displacement

RELATEDNESS



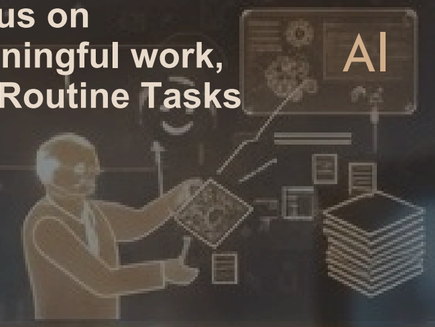
Better Collaboration through shared intelligence

COMPETENCE

Enhanced capabilities, not diminished roles

PURPOSE

Focus on Meaningful work, not Routine Tasks



*BDO's transformation showed professionals shifting from **"AI as threat"** to **"AI as enabler"** when psychological needs were addressed systematically.*

What Changes Culturally?

Job Descriptions

We used to match roles to resumes.

Role Evolution

We must design agent roles around continuously adaptive learning objectives.

Command and Control

Supervisors assign, teams deliver.

Collaboration by Design

Now agents co-participate in workflows. Systems must enable human-AI dialogue, not just delegation.

Metrics Only

We track KPIs and OKRs.

Meaning-Inclusive

We must also assess "fit to purpose" and "alignment to human flourishing"—e.g., does the AI make work better for people?

Static Roles

We trained and stayed in silos.

Fluid Capabilities

Agents evolve. Organizations must budget time and resources to recalibrate agents, just like upskilling humans.

Success Story

Defined Roles Clearly

Each AI agent had a purpose-built “persona” aligned to a professional function mirroring how a human is hired

COMPETENCE, TRUST, FIT

Adopted a phased rollout

Small, measurable wins built credibility and reduced resistance.

TRUST, SECURITY, COMPETENCE

Built AI literacy across the org

Comprehensive training enabled humans to understand and work with AI agents.

SECURITY, AUTONOMY

Created robust AI governance

Guardrails, ethical oversight, and transparency built organizational confidence.

SECURITY, TRUST, ACCOUNTABILITY

Framed AI as augmentation, not replacement

Early internal pilots proved agents help free up humans for strategic work.

PURPOSE, FUTURE VALUE, RELATEDNESS

Prioritized culture shift

Moved from tool skepticism to enthusiastic, proactive adoption of AI-enhanced workflows.

ALL 5 PSYCHOLOGICAL NEEDS, PLUS TRUST

BNY MELLON

Success Story

Reframed AI as Universal Teammate

Framed AI as “agents for everyone, everywhere, for everything,” not just efficiency tools.

PURPOSE, FUTURE VALUE, TRUST

Agents introduced and referenced like coworkers.

Used language such as “This analysis was generated by our agent, reviewed by [person].” reinforcing human-agent teaming.

RELATEDNESS, PURPOSE, TRUST

Empowered Employees as AI Creators

Built the Eliza platform for employees to create and deploy their own disposable AI agents and eliminating IT bottlenecks and enhancing ownership.

AUTONOMY, COMPETENCE, TRUST

Disposable Agents for Task-Fit

AI agents were designed to be task-specific, lightweight, and temporary—just like bringing in a freelancer for a specific deliverable.

FIT, COMPETENCE, TRUST

Leadership explicitly focused on “the psychology of AI in the company,”

Recognized that emotional and behavioral responses, not technical limits, were the biggest adoption barrier.

SECURITY, RELATEDNESS, TRUST

Visible Success Metrics

Agents produced fast, measurable results—such as dramatically reducing research or analysis time. Users could compare agent performance directly to human benchmarks.

TRUST, SECURITY, COMPETENCE

"You're not hiring an AI to do a task. You're integrating a new kind of teammate who must align with your values, grow with your people, and enhance your shared purpose."

— Jennifer & Nilanjan

Engineering & Skill Shifts: The Second-Order Changes

Hiring AI agents isn’t the hard part. The hard part is evolving your roles, metrics, guardrails, and careers so humans and agents can truly work side by side.

New Org Roles

- Managers → manage human teams
- PMs/TPMs → coordinate projects, dependencies
- HRBPs → manage culture, onboarding, learning
- Compliance/Legal → risk + governance

- Digital Agent Supervisor (AI Product Owner) → manages AI teammate lifecycle
- AgentOps / Reliability Engineering → ensures uptime, monitoring, integration health
- AI HR / Learning Partner → builds literacy, trust, reskilling pathways
- AI Ethics & Compliance Officer → runs bias checks, audit logs, guardrails
- Human-AI Collaboration Coach → helps teams adopt rituals (standups, retros with agents)

📌 *In traditional orgs, roles only supported humans. In AI-augmented orgs, we need parallel structures to support digital teammates too.*

Measuring Relationship Health

- KPIs, OKRs, manager reviews
- Peer feedback, 360 surveys
- Career progression checkpoints
- Engagement surveys (trust & culture fit)

- Accuracy, latency, uptime
- Override rate & escalation frequency
- Adoption rate across roles/teams
- Trust pulse surveys (“Do you rely on this agent?”)
- Cultural friction signals (fear of job loss, rework, avoidance language)

📌 *For humans, trust & culture are measured through engagement surveys. For agents, we must track trust metrics and cultural friction signals alongside accuracy — otherwise adoption will stall.*

Guardrails shift compliance from paperwork to engineering

- Contracts & NDAs
- Role boundaries & job scopes
- Access permissions (HRIS, finance, systems)
- Compliance reviews & audits

- Legal + Engineering must now co-own compliance (not siloed).
- Risk reviews move from annual exercises to continuous monitoring.
- Teams must design new escalation paths (e.g., what if an agent emails a client incorrectly?).

First-order: Monitor, retrain, update agents (like coaching employees).
Second-order: Build engineered guardrails — technical + policy structures that shift compliance from paper → code

From Generic Training to New Career Paths

- Ad hoc training sessions
- AI literacy & prompt workshops
- Soft skills programs (creativity, collaboration)
- Focus on general awareness

- Role mapping → Ops Analyst → AgentOps Engineer
- PM/TPM → AI Product Owner / Digital Agent Supervisor
- HRBP → AI HR / Learning Partner
- Compliance → AI Ethics Officer
- Team Coach → Human–AI Collaboration Coach
- Recognition tied to AI orchestration skills (not task volume)

Not just generic AI training, systematic pathways into new org roles so humans grow alongside agents

Take away

Hiring AI agents is only the first-order change.

The second-order changes in culture (trust, fit, value) and engineering (supervision, skills, infrastructure) determine whether human-AI coexistence accelerates or collapses.

If you stop at the first order, you'll repeat the 70% failure pattern of past transformations.

Thank you

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