THE AI AGENT VALUE REPORT 2026

What Mid-Sized Organizations Want Most From AI Agents

Logically™ Hatz



EXECUTIVE SUMMARY

In the summer of 2026, Logically and Hatz AI commissioned an independent survey of 518 employees across mid-sized U.S. organizations — those with 51 to 5,000 employees — spanning nine major industries and all major functional roles. The survey was conducted from August 27 to September 10, 2026. Respondents were asked a single, high-signal question: Which five AI agents would create the greatest value for you or your organization? The results reveal where organizations are placing their highest expectations — and where AI has the clearest mandate to deliver.

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KEY FINDINGS AT A GLANCE

01 Knowledge is the #1 priority.

The Knowledge Assistant — which answers questions from company policies, procedures, and documentation — was chosen by 37.6% of respondents, making it the most universally demanded agent across every industry segment and company size. This reflects a fundamental challenge: people spend hours each week searching for information they should already have at their fingertips.

02 Productivity wins beat novelty.

The top six agents all solve foundational daily work problems — writing, scheduling, data, email, learning, and meetings. Abstract capabilities like Innovation & Brainstorming or Decision Support ranked in the bottom third, suggesting workers want concrete execution help over AI as a strategic thinking partner.

03 Larger organizations crave automation and depth.

Companies with 501–5,000 employees showed markedly stronger demand for Workflow Automation, Data Analysis, and Learning & Training agents — agents that scale institutional knowledge and process efficiency — compared to smaller peers who prioritized coordination and writing.

04 Industry context drives differentiation

Healthcare respondents uniquely elevated **Learning & Training (39%)** and **Quality Assurance (38%)**, while Technology workers led with **Data Analysis (47%)**. Education respondents overwhelmingly chose **Scheduling & Coordination (40%)**, and Business Support & Logistics cited **Meeting Assistant at 50%** — the highest single-agent score in any industry segment.

05 The Executive Chief of Staff is the least demanded agent — by design

At only 13.5%, this agent resonated primarily with management and executive functions rather than the broad workforce, confirming that generalist executive-support roles have a narrower applicable audience.

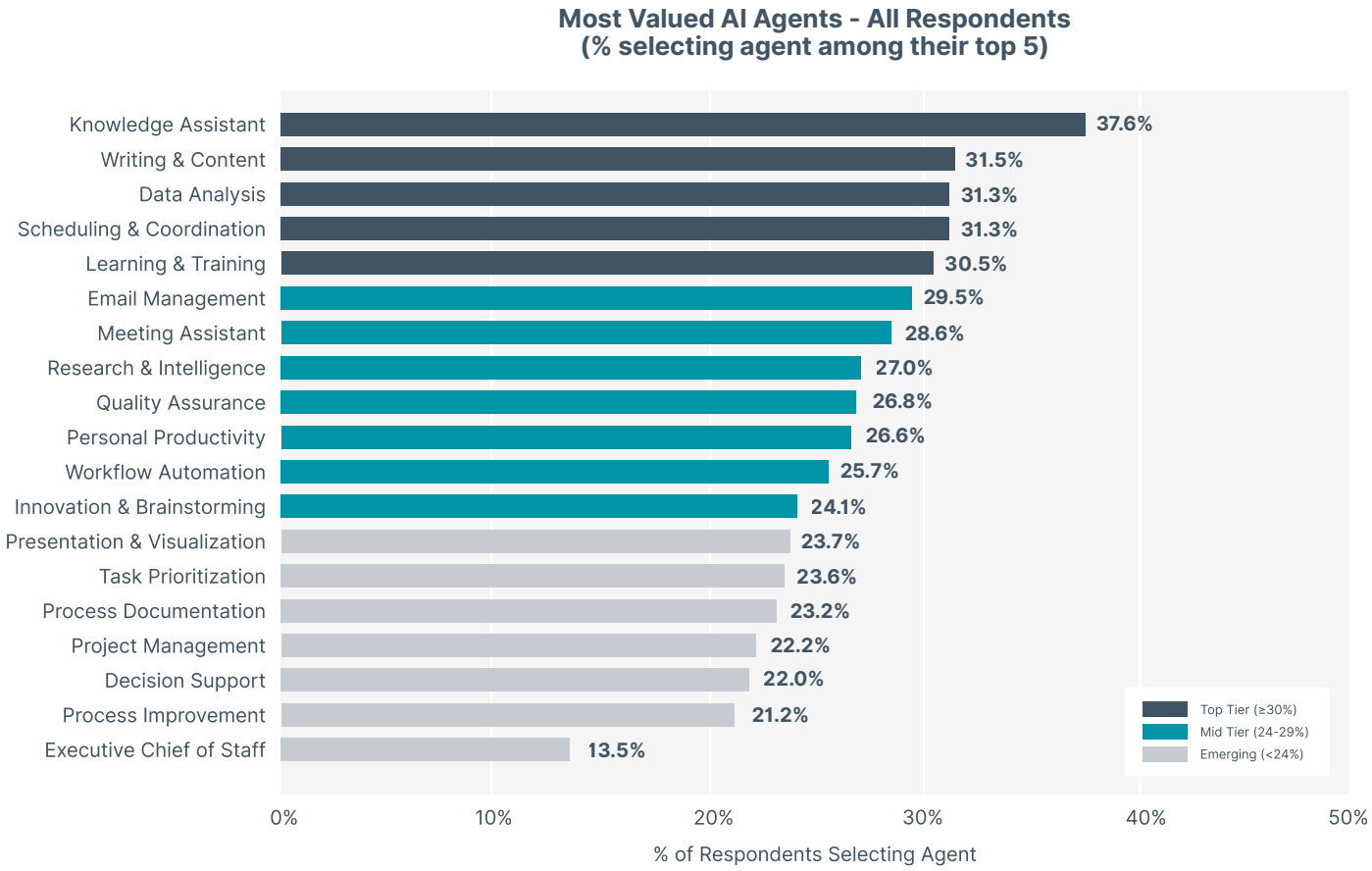
Market Context: McKinsey estimates AI has the potential to add $4.4 trillion in productivity value to the global economy [1] — and Gartner predicts 40% of enterprise applications will feature task-specific AI agents by 2026, up from less than 5% in 2025 [2]. The window to equip your workforce is now.

OVERALL FINDINGS: THE UNIVERSAL AI AGENT MANDATE

When 518 workers across industries and roles were asked which five AI agents would deliver the greatest value in their work, the answer was surprisingly consistent. Despite different job functions, industries, and org sizes, a clear hierarchy emerged — and it tells us a great deal about what knowledge workers actually struggle with every day.

Full Agent Rankings

The table below shows every agent ranked by overall selection rate across all 518 respondents.



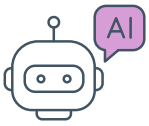
The Top Tier: Foundational Productivity

The top six agents — Knowledge Assistant (37.6%), Writing & Content (31.5%), Data Analysis (31.3%), Scheduling & Coordination (31.3%), Learning & Training (30.5%), and Email Management (29.5%) — all cleared the 29% selection threshold. What these agents share is immediacy: they address repetitive, time-consuming tasks that every professional faces regardless of their role, industry, or seniority.

This is not coincidental. Research from McKinsey's 2025 Workplace AI report found that knowledge workers spend up to 28% of their workweek managing email and searching for information — the exact pain points these agents are designed to eliminate. IDC data points to workers losing an average of 2.5 hours per day to information friction. Agents that directly attack these problems are naturally the most compelling investment.

DEEP DIVE: THE SIX MOST DEMANDED AGENTS

#1



Knowledge Assistant

37.6%

The clear frontrunner by a 6-point margin. When employees can't find answers in tribal knowledge, policy docs, or scattered documentation, productivity dies in slow motion. A Knowledge Assistant that speaks the organization's own language — and answers instantly — is the single most universal AI unlock across all company sizes and functions surveyed.

#2



Writing & Content Agent

31.5%

Drafting emails, reports, proposals, and documentation consumes hours of every professional's week regardless of their role. This agent's near-equal ranking across functions — from HR (56%) to Manufacturing (50%) to Administrative (41%) — confirms it as one of the most cross-functional agents on the list. Notably, Forrester's 2025 data shows AI writing tools reduce content production time by up to 50%.

#3



Data Analysis Agent

31.3%

Tied at third with Scheduling, the Data Analysis Agent reflects the growing expectation that every employee should be able to query, interpret, and act on data — not just analysts. IT workers (51%), Technology industry respondents (47%), and Accounting (46%) all placed this agent as their #1 or #2 choice, but even Manufacturing (36%) and Administrative workers (43%) placed it highly — suggesting data literacy gaps are widespread, not role-specific.

#4



Scheduling & Coordination Agent

31.3%

Calendar and logistics management is a universal tax on productivity. This agent scored highest among Education respondents (40%), Construction workers (41%), and the 60+ age cohort (37%). The consistent demand across age groups suggests that scheduling friction is felt equally across career stages — it never gets easier.

#5



Learning & Training Agent

30.5%

The Learning & Training agent's position in the top 5 is one of the report's most strategically significant findings. In an era of rapid skill evolution, workers want personalized learning at their fingertips. Healthcare respondents ranked it #1 (39%), and it was the top selection for Food & Beverage (56%) and a strong showing in Manufacturing (46%) — industries with high compliance training burdens. McKinsey's 2025 workplace AI survey found that 87% of executives expect significant skills disruption from AI in their organizations [1].

#6



Email Management Agent

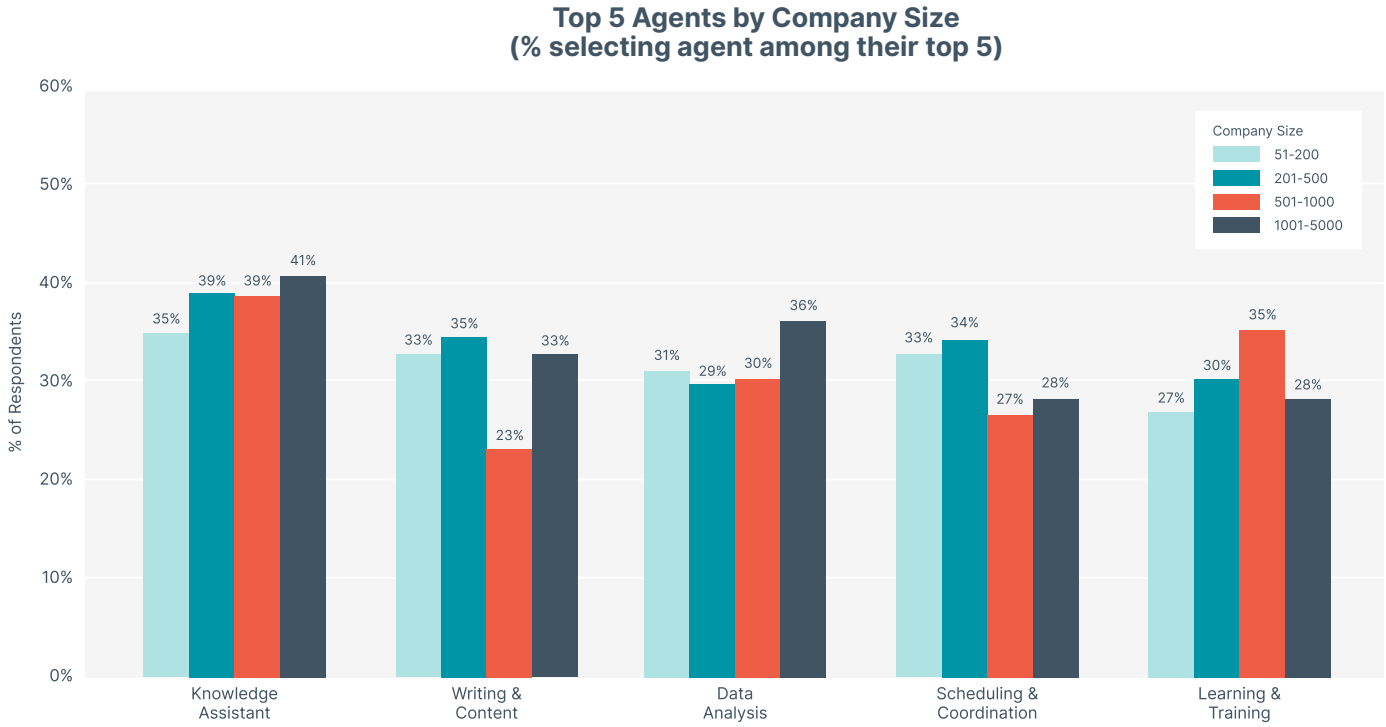
29.5%

Despite appearing #6 overall, Email Management ranked in the top 3 for Sales professionals (38%), Customer Service workers (41%), and the 1,001–5,000 employee band (35%). McKinsey's Global Institute research found that knowledge workers spend approximately 28% of the workweek on email and information search [3]. An agent that triages, summarizes, drafts, and routes email responses is effectively a full-time productivity multiplier.

ANALYSIS: HOW COMPANY SIZE SHAPES AGENT DEMAND

Mid-market is not monolithic. Organizations with 51–200 employees have fundamentally different AI priorities than those with 1,001–5,000 — and the data makes this clear.

Top 5 Agents by Company Size



51–200 Employees: Efficiency First

Smallest companies in the survey prioritized Scheduling & Coordination (33%), Writing & Content (33%), and Email Management (31%) alongside Knowledge Assistant (35%). With lean teams, every hour recovered from administrative overhead has outsized impact. Data Analysis at 31% also signals that even small organizations are hungry for data-driven decisions without a dedicated analyst on staff.

201–500 Employees: The Scaling Pivot

This band — the largest in the survey at 164 respondents — shows a clear pivot toward scale enablers. Knowledge Assistant (39%) dominates, followed by Writing & Content (35%), Scheduling (34%), and Learning & Training (31%). As organizations grow past 200 people, knowledge silos form and onboarding complexity rises — both pain points the top agents directly address.

501–1,000 Employees: Automation and Learning

A notable shift occurs at this band: Workflow Automation jumps to 32% (vs. 26% overall), and Learning & Training reaches 35% — its highest showing across all size bands. Organizations at this scale have the process complexity to benefit from automation and the headcount to need consistent, scalable training programs.

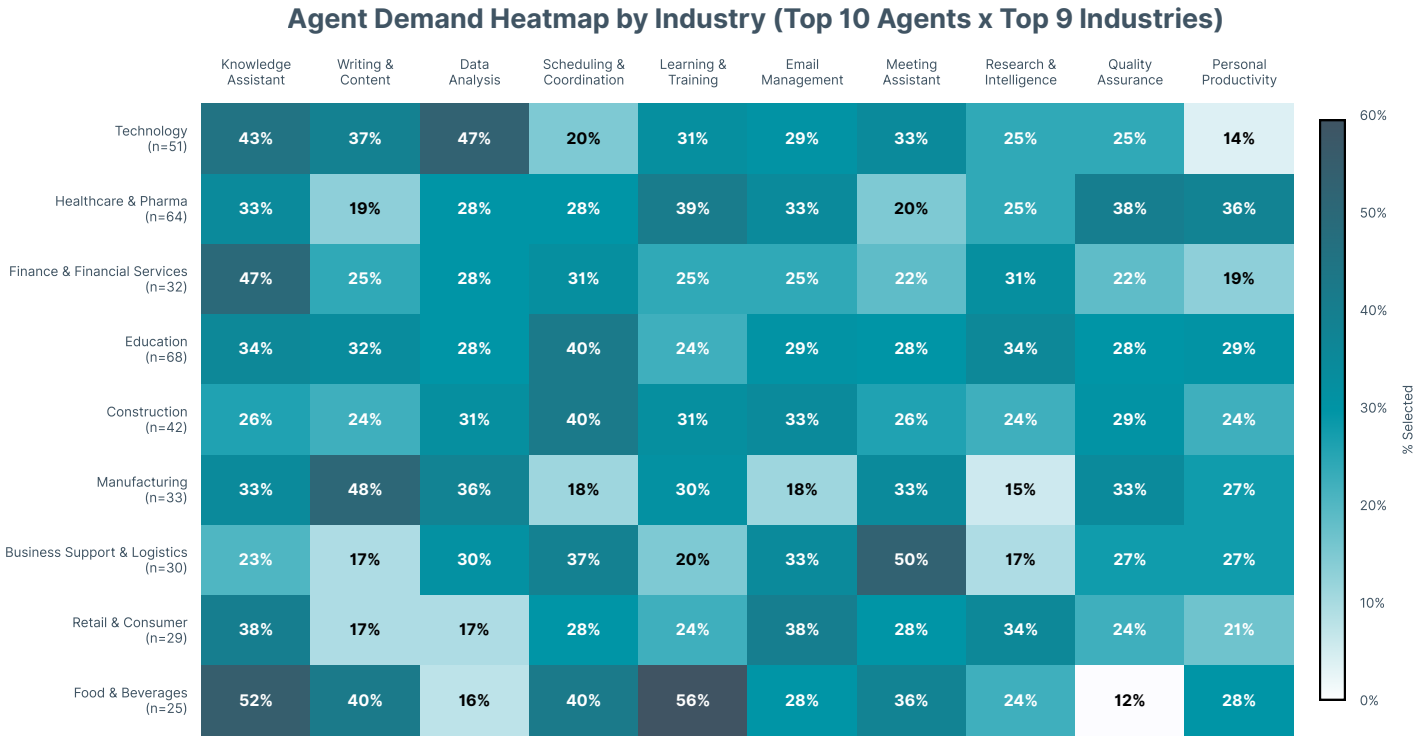
1,001–5,000 Employees: Data and Intelligence

The largest companies in the survey show the strongest demand for Data Analysis (36%), Research & Intelligence (33%), and Email Management (35%). These organizations face information overload at enterprise scale — the agents they want most are those that synthesize, surface, and prioritize the signal amid the noise. This aligns with findings from IDC and McKinsey that enterprise AI ROI is highest when deployed against information management bottlenecks [4].

ANALYSIS: INDUSTRY-LEVEL DIFFERENTIATION

While the Knowledge Assistant held its top-5 position in nearly every industry, the rankings below it reveal distinct industry identities — windows into where each sector's operational pain is most acute.

Agent Demand Heat Map by Industry



Agent selection rates by industry (top 10 agents × 9 industries with n≥20).

Notable Industry Patterns

Technology (n=51): Data Above All

Tech workers ranked Data Analysis first at 47% — 16 points above the overall average. Knowledge Assistant followed at 43%, and Writing & Content at 37%. This reflects an industry where data-driven decisions are table stakes and AI is expected to accelerate analytical cycles rather than replace them.

Healthcare & Pharma (n=64): Quality and Learning Take Priority

Healthcare uniquely elevated Learning & Training (39%) and Quality Assurance (38%) as near-tied top agents. In an industry where compliance training is mandatory and where documentation accuracy can carry life-safety consequences, this combination makes complete sense. Personal Productivity also scored strongly (36%), reflecting the high-pressure, high-stakes time demands on clinical and administrative staff alike.

Education (n=68): Scheduling and Visualization Lead

Educators placed Scheduling & Coordination at 40% and Presentation & Visualization at 35% — both substantially above average. The teaching profession involves managing complex calendars across students, staff, and institutions, while consistently producing high-quality instructional materials. These aren't luxury asks; they're table stakes for modern educators.

Construction (n=42): Curious Finding — Scheduling Over Knowledge

Construction is the only major industry where Scheduling & Coordination (41%) outranked Knowledge Assistant as the #1 agent — a statistically notable divergence. Task Prioritization was also unusually strong at 36%. This reflects the project-driven, time-critical nature of construction work where coordinating labor, materials, and deadlines is the central operational challenge.

Business Support & Logistics (n=30): Meeting Assistant at 50%

The single highest agent selection rate across any industry segment was Meeting Assistant in Business Support & Logistics at 50% — 21 points above the overall average. Operations and logistics organizations live in meetings: customer calls, vendor check-ins, team standups. An AI that automatically captures, summarizes, and assigns action items from those meetings is worth its weight in gold for these teams.

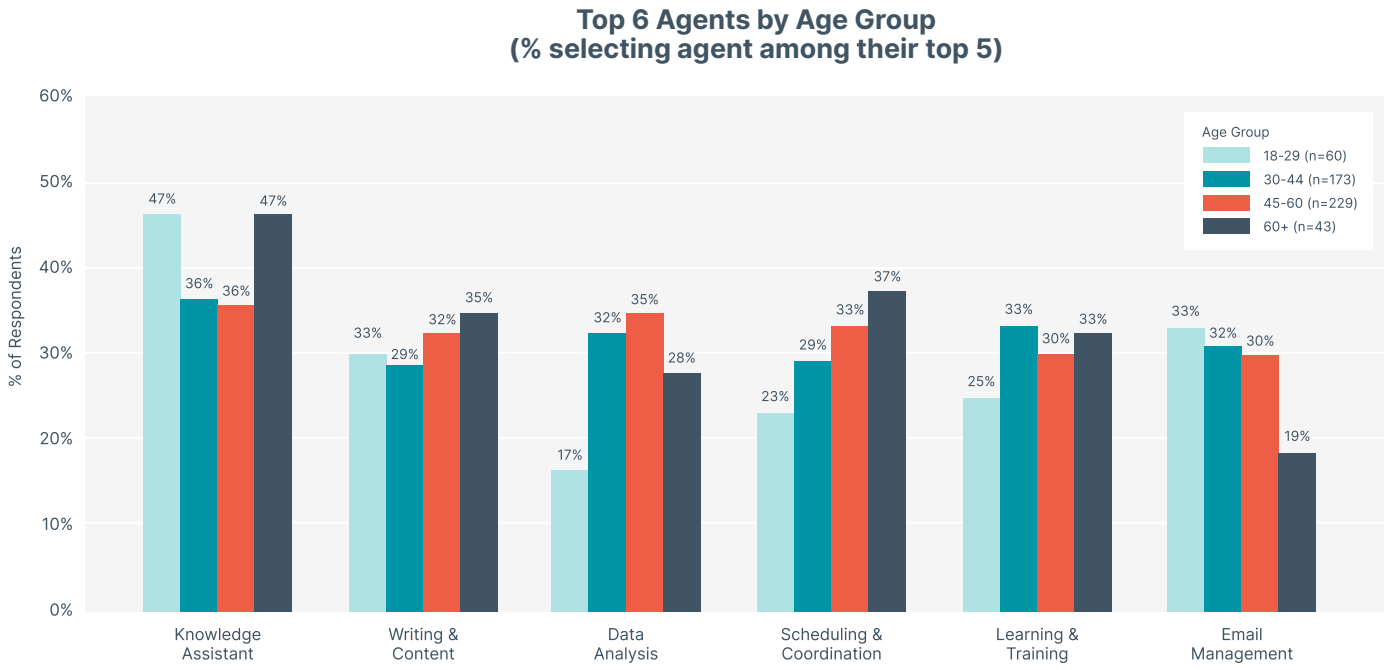
Finance & Financial Services (n=32): Knowledge and Automation

Finance respondents prioritized Knowledge Assistant (47%) and Workflow Automation (38%), reflecting the dual demand for instant regulatory and procedural knowledge access alongside the automation of repetitive financial processes — reconciliation, reporting, and compliance workflows that are ripe for AI acceleration.

ANALYSIS: GENERATIONAL AND DEMOGRAPHIC PATTERNS

While the core agent demand hierarchy is consistent across age groups, there are meaningful shifts in emphasis that reflect different career stages, work styles, and expectations of AI.

Top 6 Agents by Age Group



Age Group	Top Agent	% Selected	Notable Divergence
18-29 (n=60)	Knowledge Assistant	47%	Research & Intelligence unusually high (32%)
30-44 (n=173)	Knowledge Assistant	36%	Learning & Training #2 at 33%
45-60 (n=229)	Knowledge Assistant	36%	Data Analysis & Scheduling both at 33-35%
60+ (n=43)	Knowledge Assistant	47%	Research & Intelligence #2 at 42% Workflow Automation strong at 33%

Generational Insights

Younger workers (18–29)

Show the strongest appetite for Knowledge and Research agents — suggesting they see AI as a tool for rapid competency-building and information synthesis, perhaps compensating for shorter career experience.

Mid-career professionals (30–44)

Uniquely elevated Learning & Training to #2, consistent with the career transition phase where reskilling and professional development are active priorities.

The 60+ cohort

Stands out as the most data-and-research-focused group — with Research & Intelligence at 42%, nearly 15 points above average. This may reflect experienced professionals who place high value on thorough, reliable intelligence over speed of execution.

The 45–60 cohort

The largest at 229 respondents (44% of all respondents) — closely mirrors the overall population averages, making them the most representative benchmark for "typical" mid-market employee AI preferences.

CURIOUS FINDINGS & EXTERNAL RESEARCH CONTEXT

Unexpected Data Points



The Learning & Training Surprise

Learning & Training cracking the top 5 at 30.5% is arguably the most counterintuitive finding. Conventional wisdom suggests workers prioritize getting work done over development. This result suggests the opposite — people are acutely aware of the accelerating pace of skill change and are actively seeking AI that helps them stay current. Gartner's 2025 workforce research confirms 87% of executives report significant skill gaps in their organizations, creating a clear pull signal for training-capable AI.



The Executive Chief of Staff Disconnect

The Executive Chief of Staff agent — arguably the most "AI-forward" and sophisticated on the list — scored last at just 13.5%. This disconnect is notable: despite receiving the most media attention in AI agent discussions, this concept resonates with a narrow audience of senior leaders rather than the broad workforce. Organizations positioning AI agents purely through an executive lens may be missing 86.5% of their addressable audience.



Manufacturing's Writing Agent Result

Manufacturing respondents ranked Writing & Content as their #1 agent at 48.5% — more than 17 points above the overall average. This initially seems counterintuitive for a largely hands-on industry, but reflects the often-invisible documentation burden in manufacturing: SOPs, safety reports, compliance documentation, shift notes, and vendor communications. The Writing agent addresses the "invisible office" inside the factory floor.



Business Logistics: Meeting Overload at 50%

Meeting Assistant at 50% among Business Support & Logistics respondents is the single highest agent score in any industry segment — and it's not close. This reveals an industry drowning in coordination meetings. BCG's 2024 research found operations teams spend 32% more time in meetings than their peers in other functions, making a Meeting Assistant not a nice-to-have but a competitive necessity.



The Innovation & Brainstorming Underdog

Innovation & Brainstorming Agent scored 24.1% — hovering just below the mid-tier cutoff. Given the flood of marketing attention AI creative tools receive, this is a notably modest result. It suggests workers see AI's value primarily in execution assistance, not creative ideation. Management functions were the exception — Innovation ranked #2 for Management respondents at 39%, revealing that creative strategic thinking agents are desired most by those responsible for organizational direction.

STRATEGIC IMPLICATIONS FOR MID-MARKET LEADERS

The survey results aren't just interesting data — they're a prioritization framework. Leaders who align their AI agent investments to the agents their workforce actually wants will see faster adoption, higher utilization, and faster time-to-value.



01 Start Where Demand Is Clearest

The top three agents — Knowledge Assistant, Writing & Content, and Data Analysis — cross virtually every industry, role, and size threshold. If you're building an AI roadmap from scratch, these are the highest-confidence starting points. They have the broadest audience, the most direct productivity payoff, and the clearest use cases. Per BCG and Forrester 2026 data, AI agents focused on knowledge and analytics workflows have a median payback period of around 5–6 months — faster than nearly any other enterprise technology investment [5].

02 Match Agents to Org Size

This isn't one-size-fits-all. Smaller organizations (51–200) should prioritize coordination and communication agents that multiply lean teams. Mid-sized companies (201–500) need scale-enablers: knowledge, writing, and learning. Larger organizations (500+) should lean into automation, data intelligence, and research agents that address the information overload challenge that comes with organizational complexity.

03 Respect Industry Context

Healthcare organizations should invest in Learning & Training and Quality Assurance agents before broader deployments. Education institutions should prioritize Scheduling and Presentation agents. Construction and logistics firms need Meeting and Scheduling agents most. Don't deploy generic AI — map agent selection to your industry's unique operational pain points.

04 Don’t Neglect the Bottom Third

Agents like Process Improvement (21%), Decision Support (22%), and Innovation & Brainstorming (24%) may score lower overall, but they score significantly higher for specific functions. Process Improvement resonates with operations and engineering teams; Decision Support is valued by finance and analysts; Innovation matters most to management. Role-specific deployment strategies will outperform one-size-fits-all rollouts.

05 Governance Unlocks Adoption

Per Forrester and Anaconda 2026 research, 88% of AI agent pilots never reach production — with governance friction cited as the #2 most common blocker [6]. Organizations that establish clear access controls, data policies, and human-in-the-loop checkpoints convert pilot interest into sustained, measurable adoption. Workers want these agents — the organizational structure must make it safe to use them.

Key Principle: The agents workers want most are not the most technically impressive — they are the most practically useful. The 518 respondents in this survey voted decisively for AI that removes daily friction, not AI that impresses in demos.

YOUR TEAM IS READY. GIVE THEM THE TOOLS TO DO MORE.

The data is clear: workers want practical AI that reduces friction, surfaces knowledge, and helps them perform their jobs more effectively. The question is whether organizations will give employees a secure, structured way to realize that potential or allow it to remain untapped while competitors move forward.

The mid-market gap is real. S&P Global Market Intelligence and McKinsey data shows that only 22% of organizations with 200–999 employees have AI agents in production, compared with 51% of Fortune 500 companies [7]. That gap represents both risk and opportunity, and it is closing faster than many organizations realize.

A Practical Path from AI Access to AI Value

Successful AI adoption does not begin with building isolated use cases. It begins by establishing control.

First, control AI. Employees are already using AI, whether their organizations have formally approved it or not. Businesses need to provide secure access while gaining visibility and control over data, identity, security, cost, and the scope of AI usage. This foundation helps reduce Shadow AI risk and gives employees an approved environment in which to work.

Next, adopt AI. Once secure access and governance are in place, employees need practical guidance and Universal Use Cases that help them experience value quickly and build confidence.

Then, create greater value. As adoption grows, organizations can identify more specific, higher-value opportunities for workflow automation and role- or industry-specific AI agents. Early successes create the momentum and organizational knowledge needed to scale responsibly.

This is where an experienced MSP becomes essential. The role extends beyond deploying individual AI tools or use cases. It is to help organizations control AI, adopt AI, and ultimately create measurable value from AI.



INTRODUCING LOGICAI BY LOGICALLY

Logically's **LogicAI** delivers Managed AI through a secure, private AI tenant and one governed, accountable platform.

What LogicAI delivers:

- Private AI tenant within a secure, governed environment, with data isolation that ensures your data never trains public models
- Access to 30+ leading large language models through one governed interface
- Shadow AI Assessment and visibility into unmanaged AI usage across your organization
- Identity-driven access controls through Entra ID and role-based permissions
- A structured environment for managing AI security, cost, scope, and adoption
- Human-led onboarding and Universal Use Cases that help employees experience value quickly
- Guided development of higher-value workflows and automation opportunities as adoption matures
- Ongoing expert support as adoption and use-case development expand
- SOC 2 Type II aligned operations

> "Over the past 18 months, we've used our Managed AI platform internally to drive structured AI adoption while meeting our own stringent security and compliance standards. Today, LogicAI helps us work faster and smarter across service delivery."
>
> **Jeremy Williams, COO, Logically**

LogicAI Plans

LogicAI Lite: Foundational Managed AI Pilot

Designed for organizations beginning their AI journey or validating readiness. LogicAI Lite helps establish a controlled foundation, introduce practical employee use cases, and prepare the organization for broader adoption.

LogicAI Pro: Structured Managed AI Adoption

Designed for organizations ready to enable AI across teams with governance, visibility, and expert-led adoption. LogicAI Pro delivers a comprehensive Managed AI experience that helps employees apply practical use cases, supports real business workflows, and scales as adoption and organizational needs grow.

Close the Gap with Logically.

hello@logically.com | 866.946.9638

ABOUT THIS SURVEY

This report is based on original primary research conducted by Logically and Hatz AI in the summer of 2026. The survey was in the field from August 27 to September 10, 2026. Respondents were pre-screened to ensure they were actively employed at organizations with 51 or more employees. The survey was distributed across all major U.S. geographic regions and spans a balanced gender and age distribution. Participants were not rewarded for any specific answer and the survey was designed to minimize selection bias.

Respondent Demographics

Demographic	Segment	Count / Share
Company Size	501–1,000 employees	n = 116 (22%)
	1,001–5,000 employees	n = 88 (17%)
Gender	Female	260 (50%)
	Male	245 (47%)
Age	18–29	60 (12%)
	30–44	173 (33%)
	45–60	229 (44%)
	60+	43 (8%)
Top Industries	Education	n = 68
	Healthcare & Pharma	n = 64
	Technology	n = 51
	Construction	n = 42
	Manufacturing	n = 33
	Finance & Financial Services	n = 32
	Business Support & Logistics	n = 30
	Retail & Consumer	n = 29
	Food & Beverages	n = 25

Methodology Note

Respondents were asked to select exactly 5 agents from a list of 19 options, each described with a brief functional definition to ensure consistent interpretation. Results are reported as the percentage of respondents who included each agent in their top-5 selection. Cross-tabulation analysis was only surfaced where sub-group sample sizes were sufficient (n ≥ 20) to draw directionally meaningful conclusions. This report does not claim statistical significance at standard confidence intervals for sub-group findings, but directional patterns across multiple consistent segments are highlighted as noteworthy observations.

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Close the Gap with Logically, the Next-Gen MSP

Logically unifies IT operations and cybersecurity into one accountable operating model, providing shared visibility, coordinated response, and clearer control. Modern IT and multi-layered security from one partner, built into an integrated operating model that attackers can't exploit and traditional MSPs can't match.