

Work Intelligence and the Connected Worker Market

Why fifteen years of frontline digitization stalled at the dashboard -
and what the intelligence layer changes



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Executive Summary

Most industrial frontline work in 2026 still runs on paper. Printed standard operating procedures, physical sign-off sheets, and tribal knowledge held by a shrinking pool of experts remain the operating system of factories, plants, mines, and field-service networks. A generation of “connected worker” platforms — Atheer, Parsable, Poka, Augmentir, Tulip, Dozuki, and others — set out to fix this beginning around 2011. They succeeded at digitization: paper became mobile checklists, expert calls became AR video sessions, and compliance records began generating themselves.

But after fifteen years, the category's own results tell the story. The platforms remain small, the market remains fragmented with no dominant winner, and the deepest problem the category identified for itself — in the words of one vendor's own sales material, that “the organization is not learning from the insights” — remains unsolved. Digitization made work visible. It did not make organizations smarter.

This paper analyzes the connected worker landscape, profiles its principal vendors, and introduces a three-layer maturity model: paper, digitization, and intelligence. EON Work Intelligence operates at the third layer. It absorbs the proven capabilities of the digitization generation — digital work instructions, remote assistance, compliance capture — and adds what that generation structurally could not build: a closed loop in which work is simulated before it is performed, captured while it is performed, measured after it is performed, and compounded into organizational knowledge that improves the next execution.

The economics of this layer only became possible in the last twenty-four months. AI-native development collapses the feature-velocity and integration costs that constrained the digitization generation, and frontier AI models convert legacy paper SOPs into rich digital procedures in minutes rather than months. The result is a practical adoption ladder: an organization can move from paper to digital in weeks, and from digital to a learning organization within a budget cycle — without skipping a step.

1. The Frontline Reality: Paper, Experts, and Escalation

Enterprise digital transformation skipped the frontline. ERP, CRM, and PLM systems record what the enterprise plans, sells, and designs — but the place where physical work actually happens is still governed by binders, laminated checklists, and the memory of senior technicians. Frontline operators juggle multi-page printed procedures; trainers sign paper competency sheets; archives live in filing cabinets.

The operational consequences are consistent across industries:

- Escalation dependence. When work deviates from the script, the answer is “call an expert.” Experts are scarce, expensive, retiring, and unavailable at 3 a.m. — and every answer they give is consumed once and lost.
- Alert and recall exposure. New work orders, line changeovers, and product introductions are precisely the moments when paper procedures fail, producing quality escapes, alerts, and in the worst cases recalls.
- Unmeasurable execution. Management has real-time visibility into finance and inventory but none into whether critical work was performed correctly. Sign-off sheets attest that work happened, not how.
- Knowledge evaporation. The most valuable operational asset — how work is actually done — exists nowhere in the enterprise's systems of record. It walks out the door with every retirement.

The commercial pattern follows directly: the money is in operations and frontline execution, where thousands of workers and real production risk live. Learning and development budgets are real but smaller, and even L&D spending is ultimately justified by the same outcome — avoiding alerts, avoiding escalations, and limiting recalls. The name of the game is just-in-time escalation avoidance, and the ability to measure everything.

2. The Digitization Generation (2011–2024)

A wave of venture-backed platforms emerged to digitize frontline work, typically organized around three pillars: work assistance (digital instructions, checklists, and jobs), remote assistance (live video with annotation, connecting a frontline worker to a remote expert), and self assistance (contextual access to documents, training, and guidance). Deployment targets were phones, tablets, and smart glasses.

2.1 Atheer — the reference case

Atheer (Santa Clara, founded 2011) is one of the clearest reference cases for the category's arc. It began in the AR smart-glasses era, pivoted to a software “Front Line Worker Platform” built on the three pillars above, and today positions as a service performance platform for equipment

manufacturers and their field, dealer, and installer networks. Its current platform delivers digital workflows with AI-assisted step guidance, remote expert sessions, and automatic compliance capture — timestamps, photos, signatures, and measurements recorded as work happens, audit-ready by default, online or offline.

Atheer's enterprise logos are genuinely impressive — automotive groups, consumer products leaders, mining and industrial companies — and its transformation areas read as a map of frontline operations: site commissioning, installations, preventive maintenance, operations and fulfillment, line changeovers, repairs, field service, inspections, audits, and training.

Yet the trajectory is sobering. Public company-intelligence sources report roughly USD 35 million raised over fifteen years, estimated revenue around USD 11 million, headcount estimated between approximately 30 and 75, and a recent merger transaction (with Pronto) rather than an independent scale-up. This is not a criticism of Atheer's team or vision — it is evidence about the structure of the layer they occupy. Three constraints recur across the digitization generation:

- Complexity at the point of use. Frontline tools must be radically simple; platforms accreted features and configuration burden that slowed adoption on the floor.
- Feature velocity. Pre-AI software economics made every new capability a quarter-long, engineer-constrained project. Vendors could not build fast enough, and building was expensive.
- Integration cost. Every SAP, Oracle, or MES connection was a bespoke services project, lengthening sales cycles and implementations.

2.2 The broader field

The connected worker category today is crowded and specialized. Each notable vendor owns a slice of the problem:

- **Augmentir** — AI-driven skills management and personalized work guidance; analyzes how workers perform and targets training to individuals.
- **Parsable** — digitizing complex SOPs with conditional logic and compliance traceability; strong with CPG and packaging enterprises.
- **Poka** — tribal-knowledge capture through operator-generated video; a “YouTube for the factory” plus training tracking.
- **Tulip** — no-code app building for frontline operations, connected to machines and sensors.
- **Dozuki** — clean, structured digital work instructions for manufacturing.
- **SafetyCulture** — inspection checklists and safety rounds at high volume and low price point.

- **Librestream (Onsight)** — AR remote assistance connecting field technicians to remote experts.

Enterprise deployments in this category are typically custom-priced, commonly cited in the range of USD 25,000 to 100,000+ per year for mid-size rollouts, with larger enterprises well beyond that. Notably, fifteen years in, no vendor owns the full work lifecycle, and none has become the category-defining platform the way Salesforce defined CRM or SAP defined ERP. The slice-ownership pattern is itself diagnostic: the digitization layer fragments because digitization alone does not compound.

3. The Frontline Maturity Pyramid

The market is best understood as three layers of a pyramid. Most of the world's frontline operations remain at the bottom; the digitization generation built the middle; the top layer is now being defined.

Layer	Who lives here	What it delivers	Structural limit
Layer 3 — Intelligence	EON Work Intelligence	Work is simulated, executed, measured, and fed back; the organization compounds knowledge with every job	None identified — net-new category (Gartner-validated)
Layer 2 — Digitization	Atheer, Augmentir, Parsable, Poka, Tulip, Dozuki, SafetyCulture, Librestream	Paper becomes mobile checklists; execution becomes visible; compliance records generate automatically	Data ends in dashboards; the organization does not learn; experts remain a scarce, consumable resource
Layer 1 — Paper	The majority of industrial frontline operations today	Binders, printed SOPs, physical archives, tribal knowledge	Linear, unversioned, error-prone, unmeasurable, invisible to the enterprise

The critical insight is that the middle layer's ceiling is structural, not incidental. A digital checklist produces data about task completion. It does not produce understanding of the work itself — the spatial context, the skill of the worker, the deviation patterns, the expert knowledge invoked when things go wrong. Dashboards summarize; they do not learn. The digitization generation's own marketing identified this ceiling precisely: organizations were still not learning from the insights. That sentence is the boundary line between Layer 2 and Layer 3.

4. The Frontline Work Lifecycle: Who Owns What

Connected worker vendors describe the work lifecycle in three phases: work initiation in the back office (ticket management, work order generation, scheduling), work execution on the frontline (pre-work context, execution with instructions and remote assistance, post-work verification), and work reporting back to the enterprise (analysis, updates to the ERP or MES).

An important and often-obscured fact: no connected worker platform owns work initiation. Ticket management, work order generation, and scheduling live in the ERP, MES, or CMMS, and every vendor — including Atheer — integrates with those systems rather than replacing them. EON takes the same position deliberately and states it plainly: EON does not build ERPs. ERP systems take words — transactions, records, schedules. EON takes worlds — the physical, spatial, human reality of work being performed. The two are complementary systems of record, connected by integration.

Where EON differs is in how much of the execution loop it closes. Pre-work becomes simulation and rehearsal (Genesis); execution becomes capture (FieldIQ); post-work becomes measurement (AssessIQ); and analysis becomes compounding organizational knowledge (Compound IQ) rather than a static report. The loop runs continuously, orchestrated by EON Conductor and quality-gated by EON Verdict, with results written back to the customer's systems of record.

5. EON Work Intelligence: The Third Layer

EON Work Intelligence, released by EON AI Ventures and built on twenty-five years of EON Reality's immersive-training heritage across 4,400+ institutional customers in more than 80 countries, is an enterprise platform for capturing, improving, and compounding how physical work is actually done. Gartner has independently validated Work Intelligence as a net-new market category, with no incumbent capturing real-world field work into a digital twin of work.

The platform is an intelligence flywheel of four connected products:

- **Genesis** — world-centric 3D/XR simulation of the actual workplace. Procedures run as Show Me, Train, Let Me Try, Evaluate Me. Workers rehearse a line changeover or a high-risk maintenance task before touching real equipment — the capability no Layer-2 platform offers.
- **FieldIQ** — execution capture in the field: guided digital procedures on phones, tablets, and glasses, recording how work is actually performed, including deviations and expert interventions.
- **AssessIQ** — measurement of demonstrated competence against standards — not merely whether a task was checked off, but whether the worker can do the work.
- **Compound IQ** — the learning loop: insights from execution and assessment automatically improve procedures, training content, and the digital twin of work, so every job makes the next job better.

Two platform services bind the flywheel: EON Conductor orchestrates the loop across products and sites, and EON Verdict provides the quality gate — verifying that captured knowledge and AI-generated content meet standards before they propagate.

5.1 The expert-scarcity inversion

The digitization generation treats expert knowledge as a resource to be reached: remote assistance connects a worker to an expert, the problem is solved, and the knowledge evaporates when the call ends. Work Intelligence inverts this. Remote expert sessions are captured, transcribed, structured, and gated into the knowledge base — so the same question never needs to be asked twice, and the expert's knowledge becomes a permanent, compounding asset available at 3 a.m. in any language. Escalation stops being a cost center and becomes the organization's primary knowledge-capture mechanism.

5.2 The AI-native economics

The three constraints that capped the digitization generation — simplicity, feature velocity, and integration cost — are precisely the constraints that frontier AI dissolves. EON's platform is developed AI-natively, with feature cycles measured in days; legacy paper SOPs and PDFs are converted into rich digital procedures by AI in minutes, eliminating the re-authoring projects that stalled Layer-2 deployments; and integration with SAP, Oracle, Maximo, and MES systems is delivered through standardized MCP-based connectors rather than bespoke services engagements. The intelligence layer is not just a better idea than the digitization layer — it is the first moment in the market's history when the idea is economically buildable.

6. Capability Comparison

The table below compares EON Work Intelligence against Atheer and the broader connected-worker field. Capabilities marked “Preview” are in active development on EON's published roadmap with general availability targeted for Q3 2026; capabilities marked “Available — unique” have no equivalent at Layer 2.

Capability	Atheer	Connected-worker field (Augmentir, Parsable, Poka, Tulip, Dozuki)	EON Work Intelligence	EON status
Digital work instructions and checklists	Yes — core product	Yes — core product	Yes — generated by AI from existing SOPs, manuals, and expert capture rather than manually authored	Available
No-code authoring	Yes (form-builder style)	Yes (form/app builders)	AI-generative authoring: paste a PDF or record an expert; the procedure builds itself	Available

Capability	Atheer	Connected-worker field (Augmentir, Parsable, Poka, Tulip, Dozuki)	EON Work Intelligence	EON status
Paper / PDF bridge (ingest legacy SOPs; export any procedure back to print)	Partial (manual re-authoring)	Partial (manual re-authoring)	Automated two-way conversion — legacy documents in, audit-ready print packs out	Preview — Q3 2026
Smart branching forms (conditional logic, pass/fail routing)	Yes	Yes (Parsable strongest)	Conditional logic across 2D forms and 3D procedures	Preview — Q3 2026
Jobs: assignment, scheduling intake, status reporting	Yes	Yes	Work-order intake from ERP/MES; execution status returned automatically	Preview — Q3 2026
Remote expert assistance (live video, see-what-I-see)	Yes — flagship feature	Librestream strongest; others partial	Live assist plus automatic capture: every expert session is transcribed, structured, and added to the knowledge base	Preview — Q3 2026
Compliance capture (timestamps, photos, signatures, audit trail)	Yes — audit-ready by default	Yes (varies)	Evidence captured during execution and verified by EON Verdict	Preview — Q3 2026
Offline operation with sync	Yes	Yes (varies)	Offline execution with automatic reconciliation	Preview — Q3 2026
Immersive 3D / XR simulation of the actual workplace	No (AR overlays only)	No	Genesis world-centric simulation: Show Me, Train, Let Me Try, Evaluate Me — practice before touching real equipment	Available — unique
Competence measurement (not just task completion)	No	Partial (Augmentir skills tracking)	AssessIQ measures demonstrated skill against standards	Available — unique
Execution capture into a digital twin of work	No	No	FieldIQ captures how work is actually performed in the field	Available — unique

Capability	Atheer	Connected-worker field (Augmentir, Parsable, Poka, Tulip, Dozuki)	EON Work Intelligence	EON status
Organizational learning loop (insights improve procedures and training automatically)	No — data ends in reports	No — data ends in dashboards	Compound IQ: every execution improves the next one, orchestrated by EON Conductor	Available — unique
ERP / MES / CMMS integration	Yes (custom integration projects)	Yes (API projects)	MCP-based connectors to SAP, Oracle, Maximo and others — weeks, not quarters	Preview — Q3 2026
Device coverage	Phones, tablets, smart glasses	Phones, tablets (XR rare)	Phones, tablets, smart glasses, and full XR headsets	Available

Read vertically, the table shows the strategy: EON is absorbing the proven table-stakes of the digitization layer (the Preview rows) while holding four capabilities no Layer-2 vendor possesses (the unique rows). The Preview rows are catch-up by design — commodity capabilities accelerated by AI-native development. The unique rows are the moat: they require a 3D simulation engine, a competence-measurement methodology, and a learning loop that took twenty-five years of immersive-training expertise to build and that cannot be retrofitted onto a forms platform.

7. The Adoption Ladder: From Paper Without the Leap of Faith

Organizations at Layer 1 are rightly skeptical of vendors selling a three-layer jump. The Work Intelligence adoption model is therefore a ladder in which each rung pays for itself and produces the data that makes the next rung natural:

- **Phase 1 — Digitize (weeks).** AI converts the organization's existing paper SOPs into mobile digital procedures with no re-authoring project. Paper compatibility is preserved in both directions: legacy documents in, audit-ready print packs out. The worker experience is deliberately minimal — one app, the day's jobs, nothing else. Outcome: everything the digitization generation offers, delivered in a fraction of the time.
- **Phase 2 — Capture and Measure (months).** FieldIQ records how work is actually performed; AssessIQ measures competence; remote assistance captures expert knowledge instead of consuming it. Outcome: just-in-time escalation avoidance — fewer

alerts, prepared work-order introductions, limited recalls, and for the first time, measurement of everything.

- **Phase 3 — Intelligence (the operating model).** Compound IQ closes the loop. Procedures, training, and the digital twin of work improve automatically with every execution. The organization owns a fourth system of record — alongside ERP, CRM, and PLM — for how work is actually done.

Phase 1 is intentionally priced and packaged as an on-ramp, not a project: the strategic value of the platform lies in the data flywheel that begins turning the day the first digital procedure runs.

8. Conclusion

The connected worker market proved the demand: frontline digitization is real, funded, and validated by the world's largest industrial enterprises. It also proved the ceiling: after fifteen years, the digitization layer remains fragmented, sub-scale, and unable to answer its own founding question — how does the organization learn from its work? Work Intelligence is the answer to that question, made buildable for the first time by AI-native economics, and anchored by capabilities — world simulation, competence measurement, execution capture, and a compounding learning loop — that the digitization generation cannot retrofit. For enterprises still operating on paper, the path up the pyramid no longer requires a leap of faith: it is a ladder, and the first rung takes weeks.