

# CBIZ Mid-Market Pulse Report Finds AI Momentum Rising as Companies Accelerate Upskilling for Execution

May 14, 2026

Cleveland, May 14, 2026 (GLOBE NEWSWIRE) -- CBIZ, Inc. (NYSE: CBZ), a leading national professional services advisor, today released the latest quarterly edition of its [Mid-Market Pulse Report](#). The study reveals that while mid-market organizations are ambitious, resilient, and focused on growth, execution is increasingly challenged by rising costs, workforce constraints, and ongoing economic and policy uncertainty. When it comes to prioritizing AI, nearly half of organizations say the lack of internal expertise is the biggest barrier, indicating the issue isn't technology itself, but readiness.

The report reflects input from more than 500 mid-market business leaders and CBIZ team members across industries and highlights a shift toward disciplined execution, where organizations must balance investment priorities with operational realities.

"We continue to hear from our clients that AI transformation, tax strategy, and regulatory complexity are areas where they need a trusted advisor to guide them," said Jerry Grisko, President and Chief Executive Officer of CBIZ. "Businesses that are pulling ahead are building more resilient, agile operating models and taking a pragmatic approach to technology by modernizing talent and processes first, then scaling AI where it measurably improves productivity, products, and services. In this environment, speed and focus are competitive advantages."

## Key Findings from the Report Include:

- **39%** of organizations are prioritizing digital and AI transformation, while **37%** are focused on talent and culture as top strategic priorities
- **48%** report lack of internal expertise as the biggest barrier to expanding AI adoption, despite continued investment in digital capabilities
- Cost pressure remains widespread, with **73%** of organizations impacted by labor costs, **68%** by technology investments, and **61%** by healthcare expenses
- **44%** cite talent and skills gaps as the leading barrier to execution, reinforcing workforce constraints as a critical issue
- **76%** indicate demand for tax strategy and planning, signaling a growing focus on liquidity, compliance, and proactive financial management

The report also introduces new CBIZ **Mid-Market Performance Indices** using a weighted approach to translate survey responses into a standardized 100-point scale, providing a clear benchmark view of current operating conditions:

- The **AI Adoption Index** stands at **35**, reflecting fragmented adoption and early-stage implementation
- The **Cost Pressure Index** stands at **42**, indicating elevated cost pressure across multiple categories
- The **Regulatory Impact Index** stands at **37**, highlighting a consistent but manageable compliance burden

The findings underscore a broader trend across the mid-market: organizations are not lacking strategy but are working to execute in an environment where margin pressure, capability gaps, and uncertainty are converging.

In response to the economic pressures highlighted in the report, CBIZ recently introduced [Insights. Applied](#), a new suite of solutions designed to help businesses convert data into coordinated action across operations, tax strategy, and technology to improve performance.

The full **Mid-Market Pulse Report** is available [here](#).

## About CBIZ

CBIZ, Inc. (NYSE: CBZ) is a leading professional services advisor to middle-market businesses nationwide. With industry knowledge and expertise in accounting, tax, advisory, benefits, insurance, and technology, CBIZ delivers actionable insights to help clients anticipate what is next and discover new ways to accelerate growth. CBIZ has more than 9,500 team members across 23 major markets coast to coast. For more information, visit [www.cbiz.com](http://www.cbiz.com).

Amy McGahan  
CBIZ, Inc.  
[amy.mcgahan@cbiz.com](mailto:amy.mcgahan@cbiz.com)

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