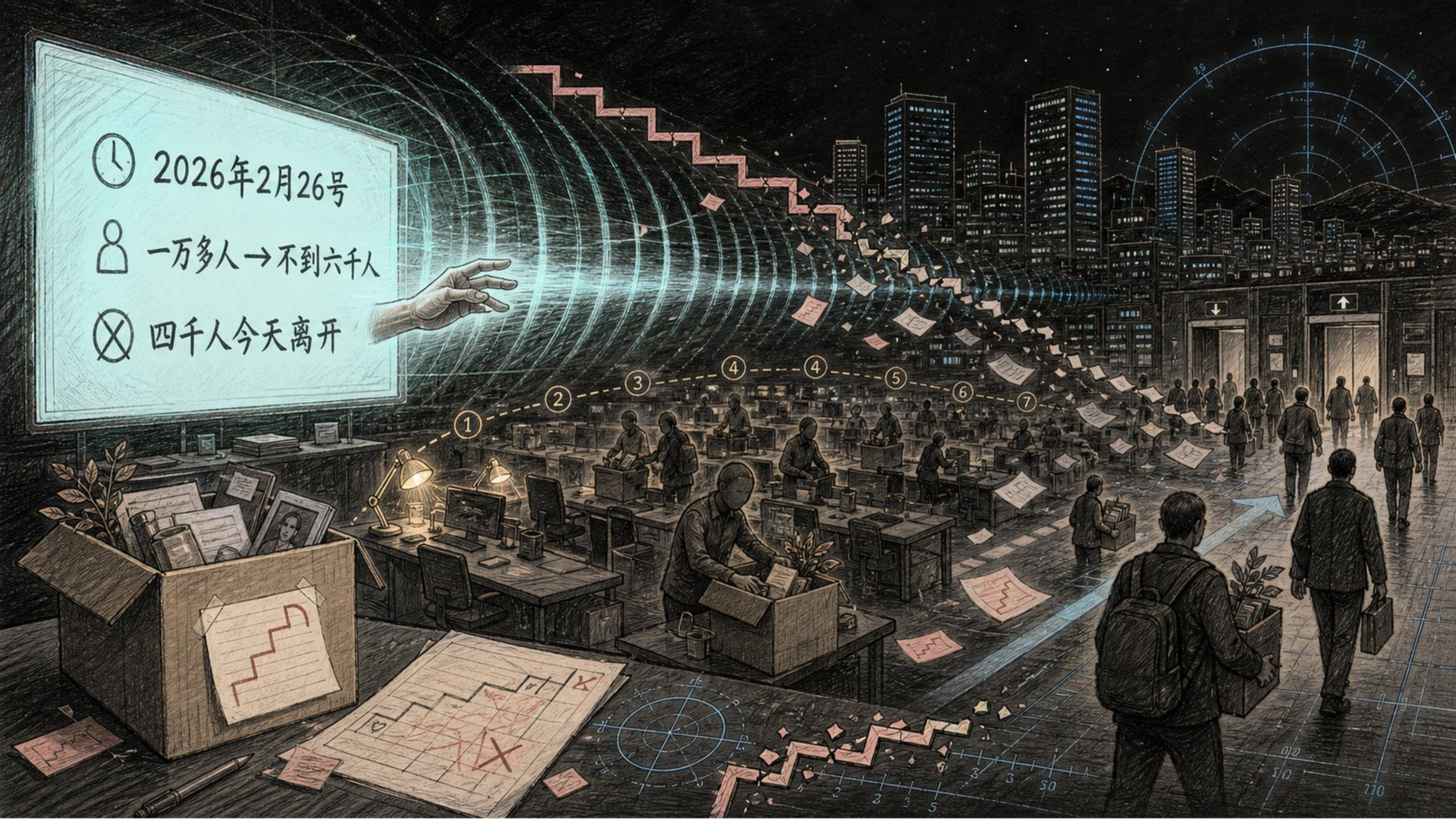
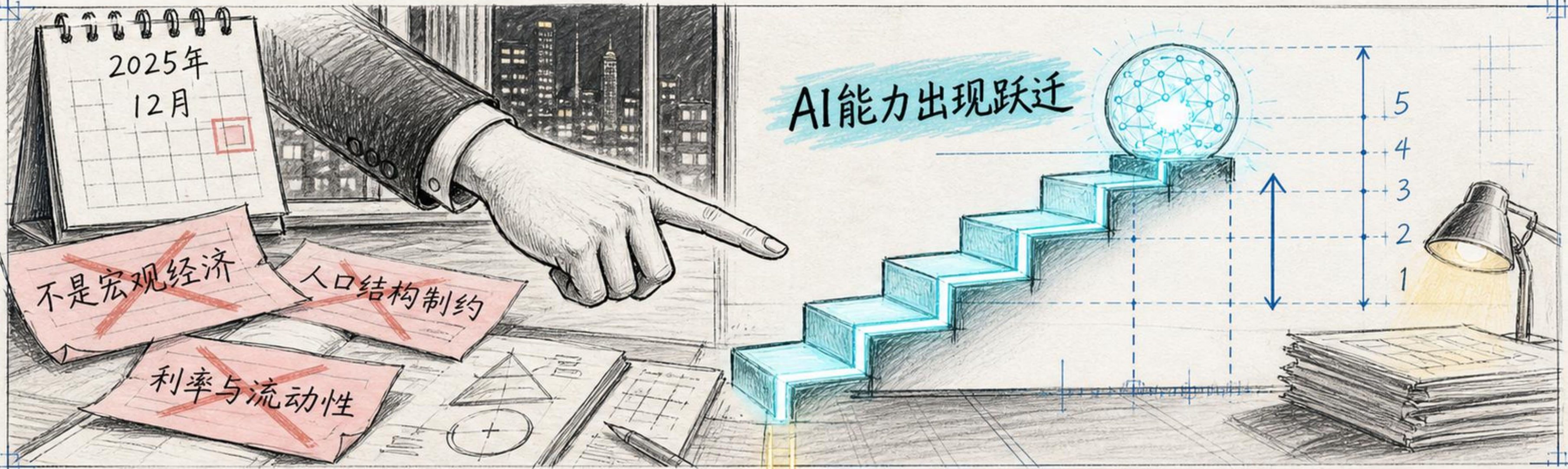


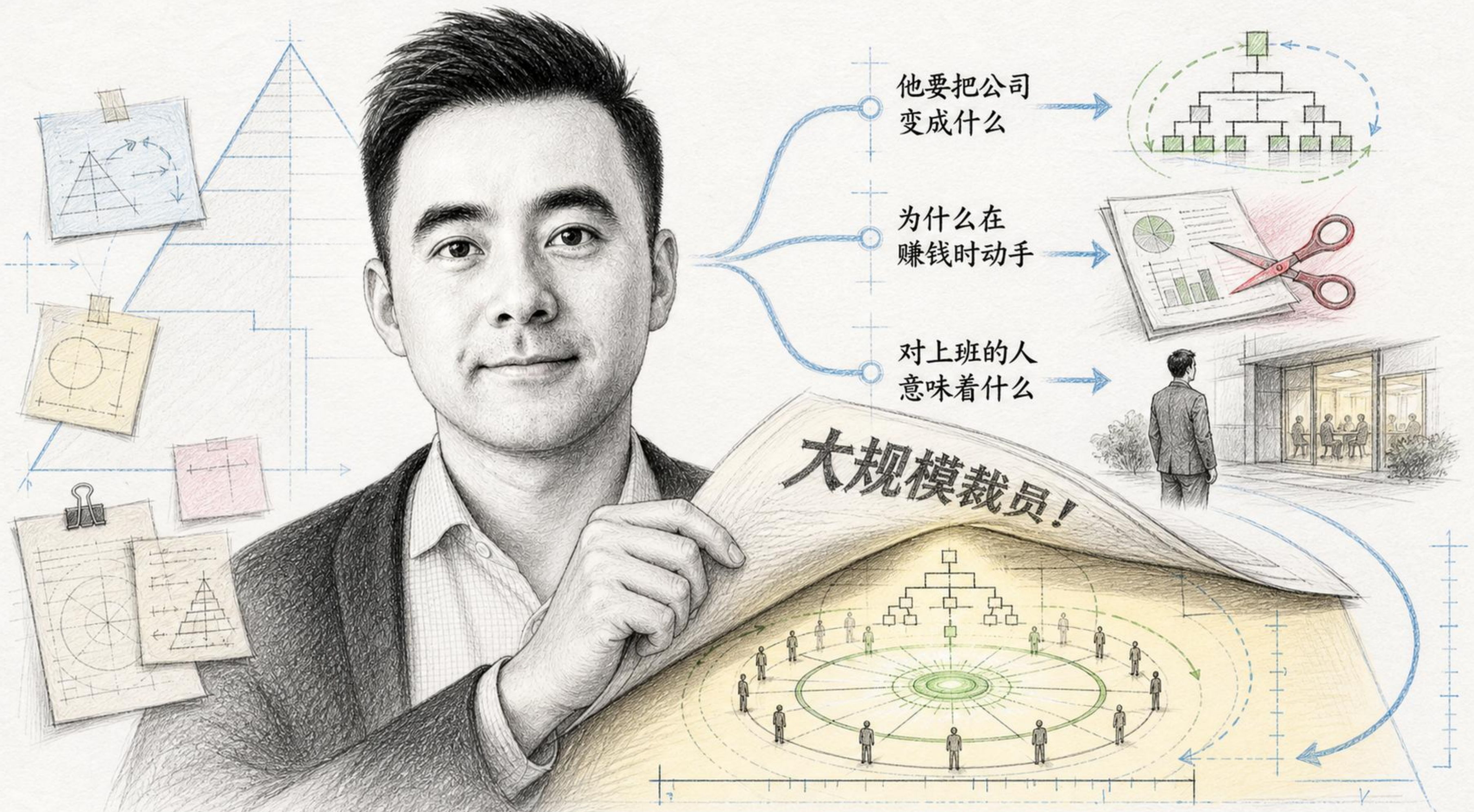
🕒 2026年2月26号

👤 一万多人 → 不到六千人

⊗ 四千人今天离开







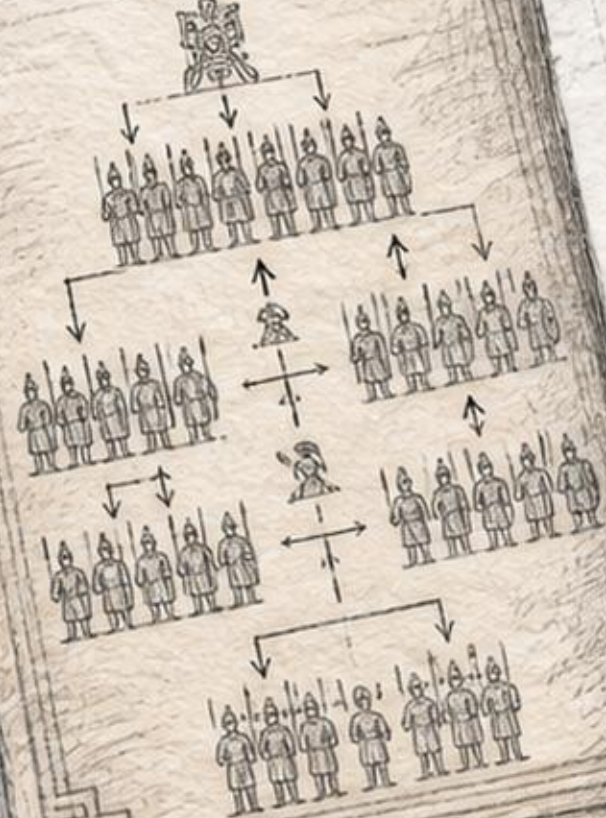
他要把公司
变成什么

为什么在
赚钱时动手

对上班的人
意味着什么

大规模裁员!

两千年

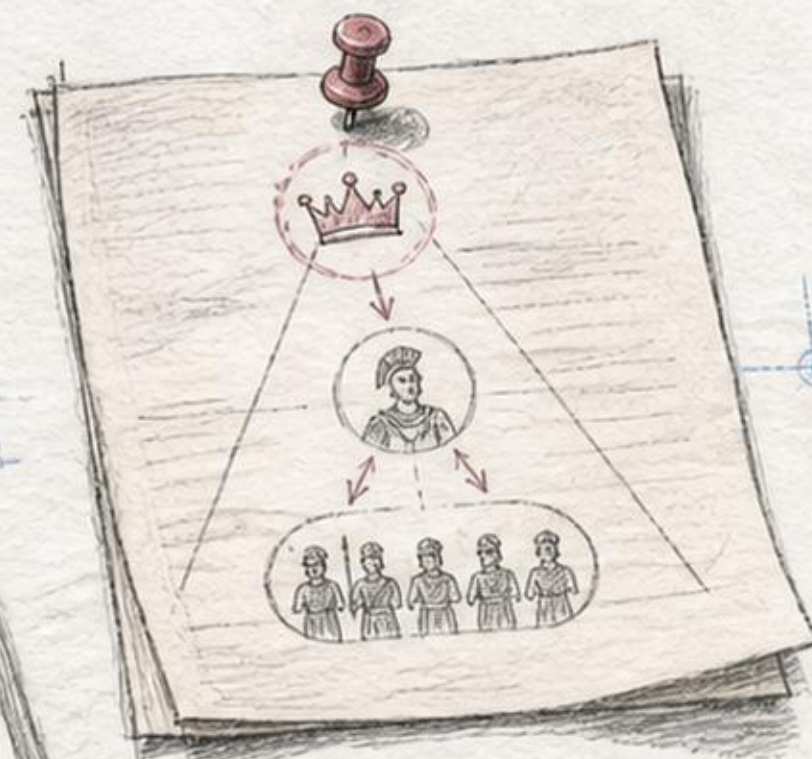
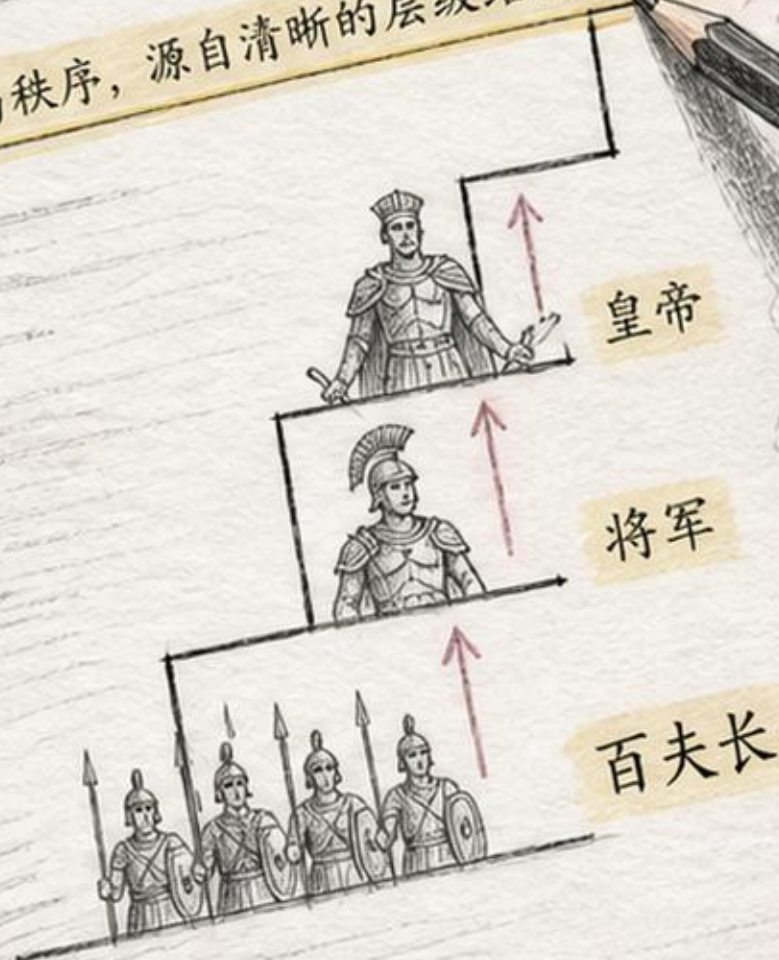


2000

《从层级到智能》



人类社会的稳定与秩序，源自清晰的层级结构。



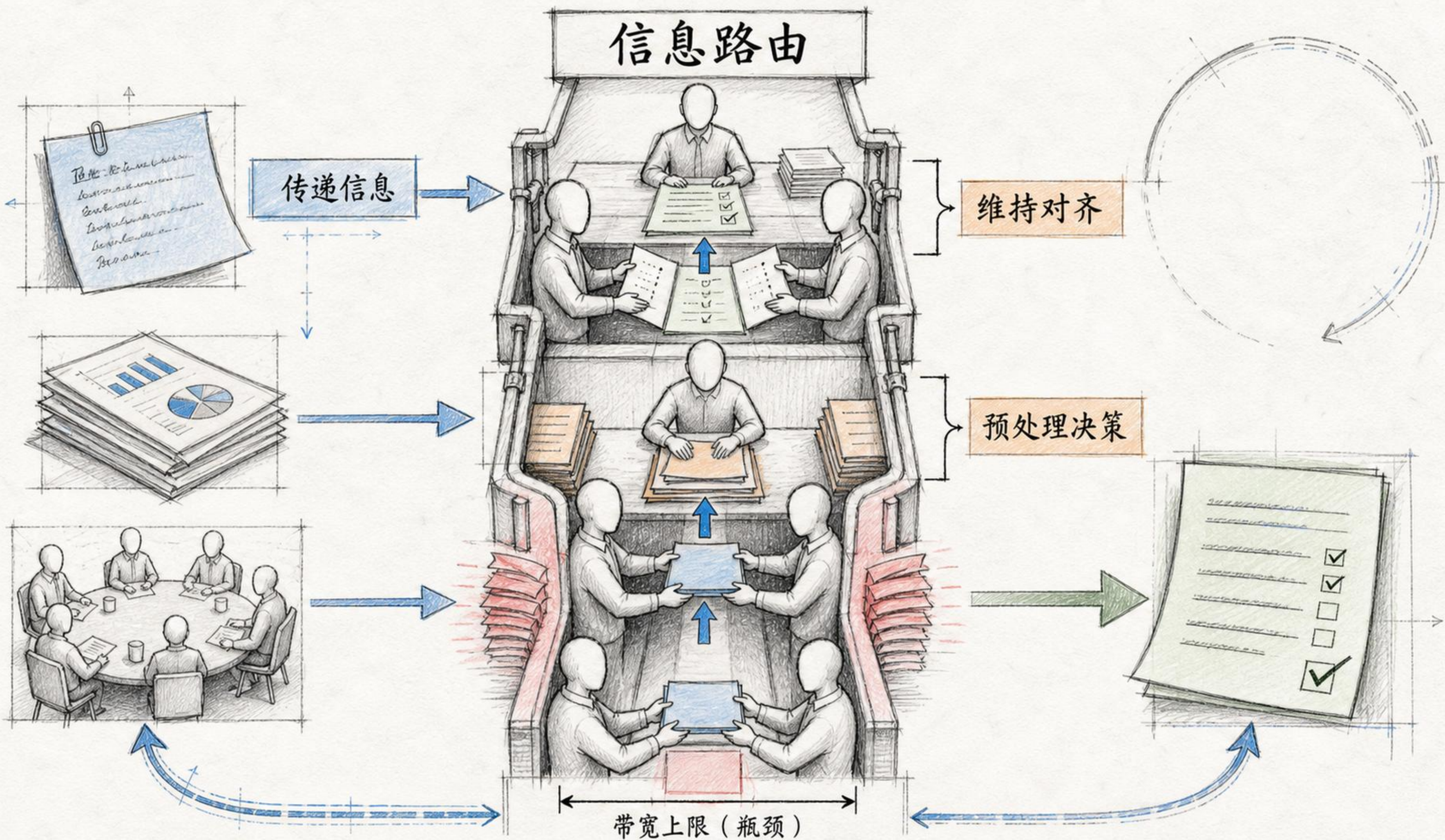
信息路由

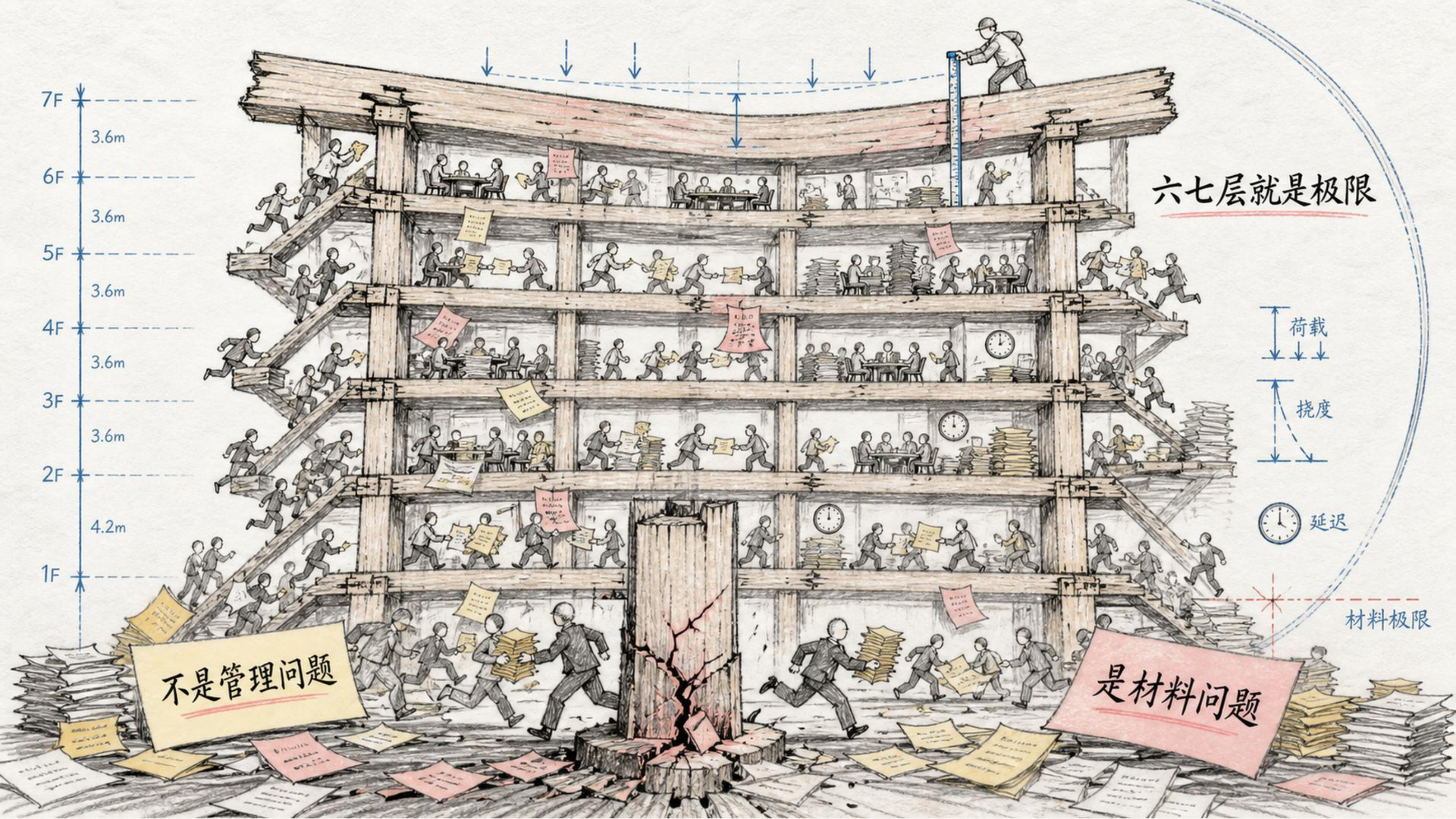
传递信息

维持对齐

预处理决策

带宽上限 (瓶颈)





六七层就是极限

荷载

挠度

延迟

材料极限

不是管理问题

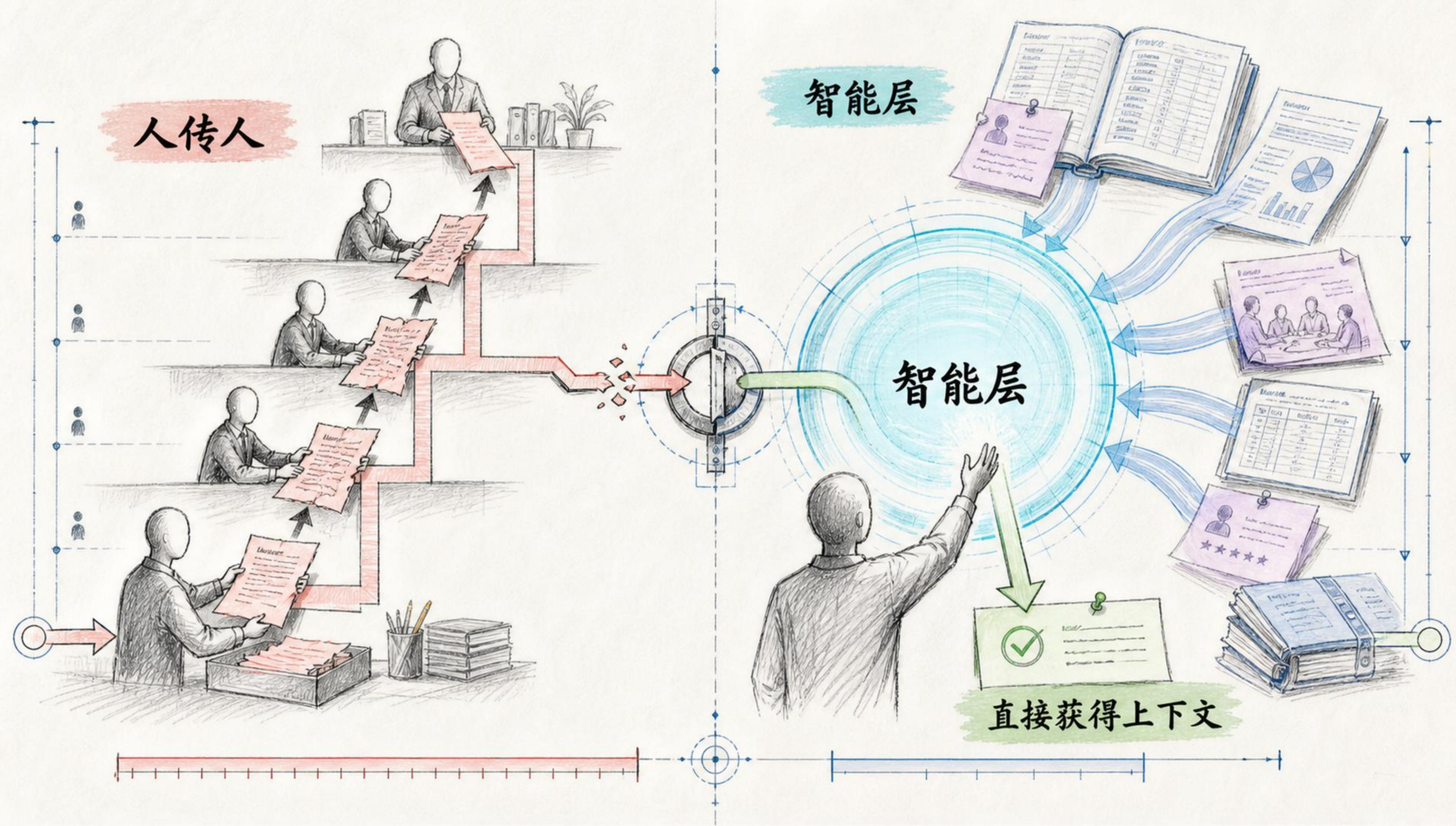
是材料问题

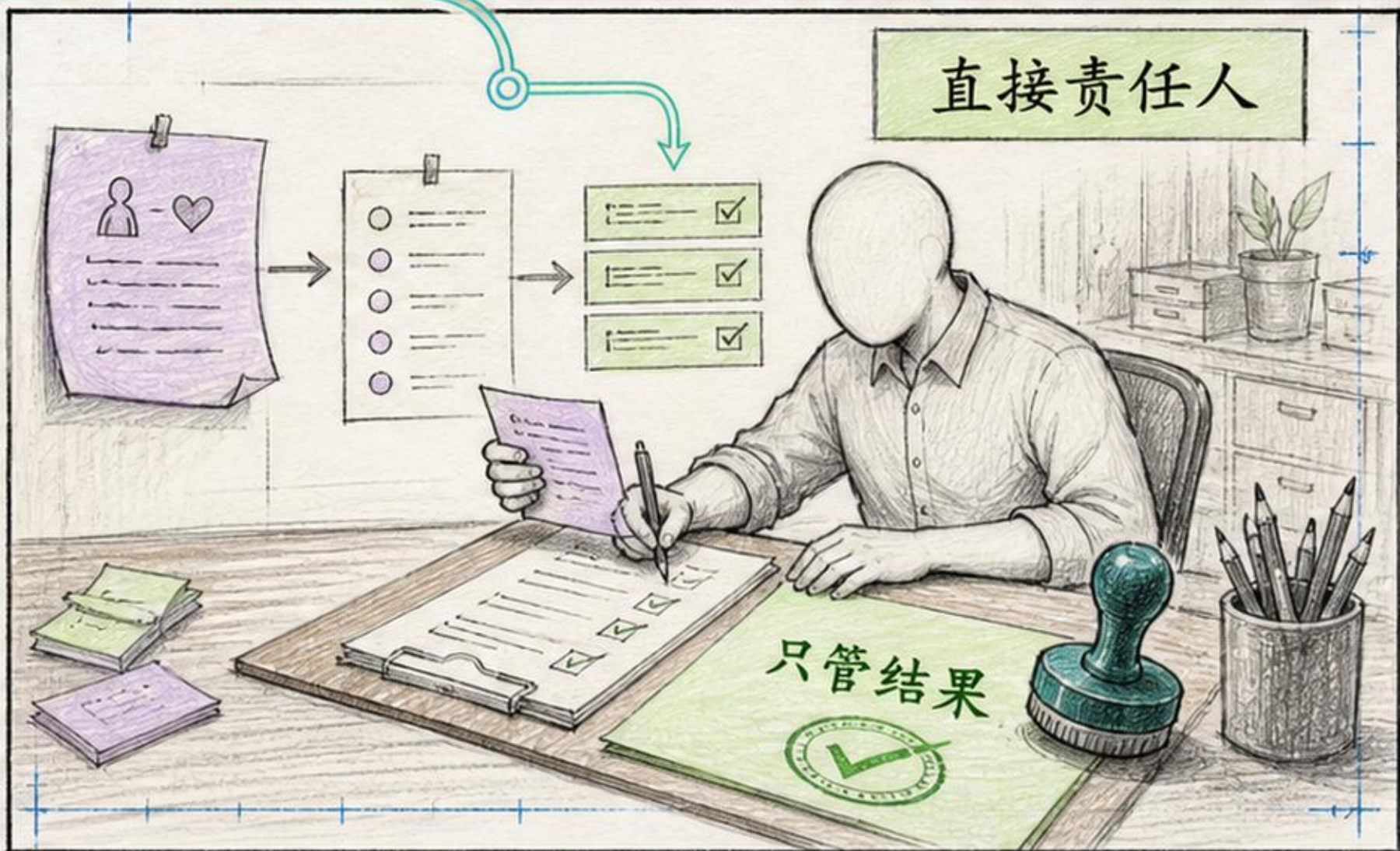
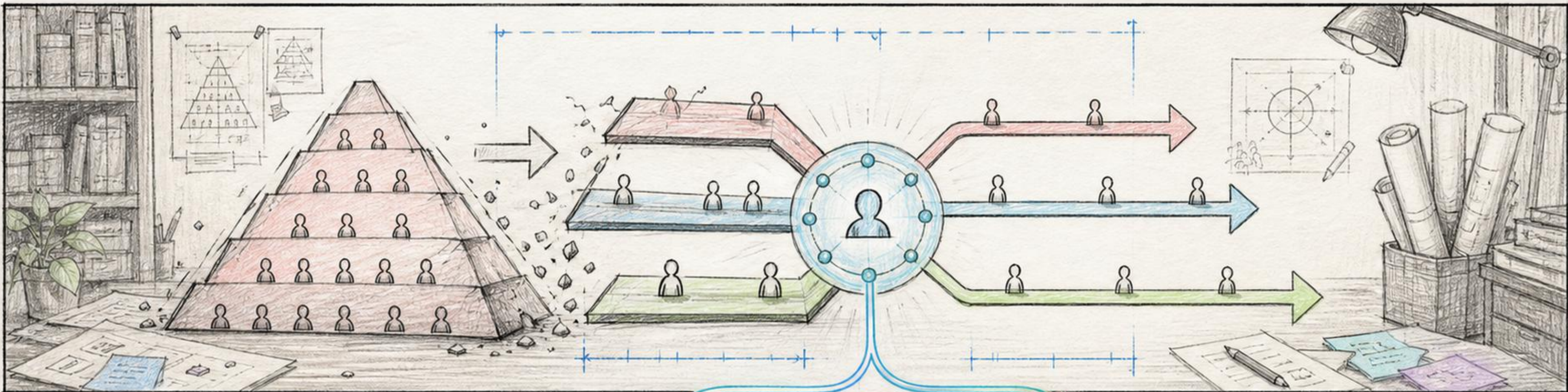
人传人

智能层

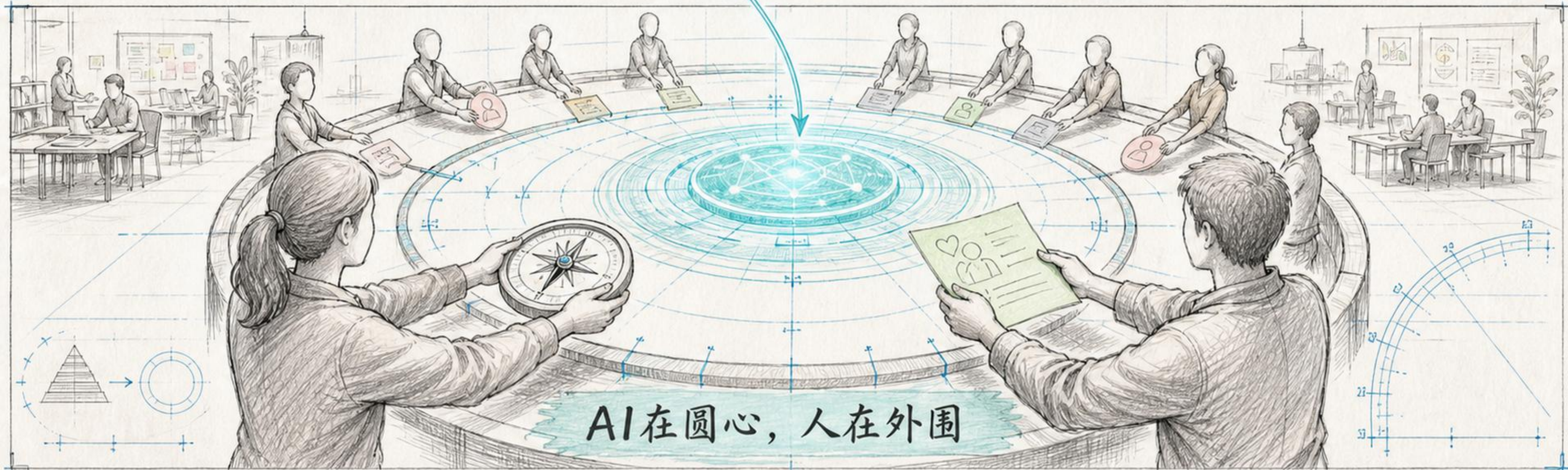
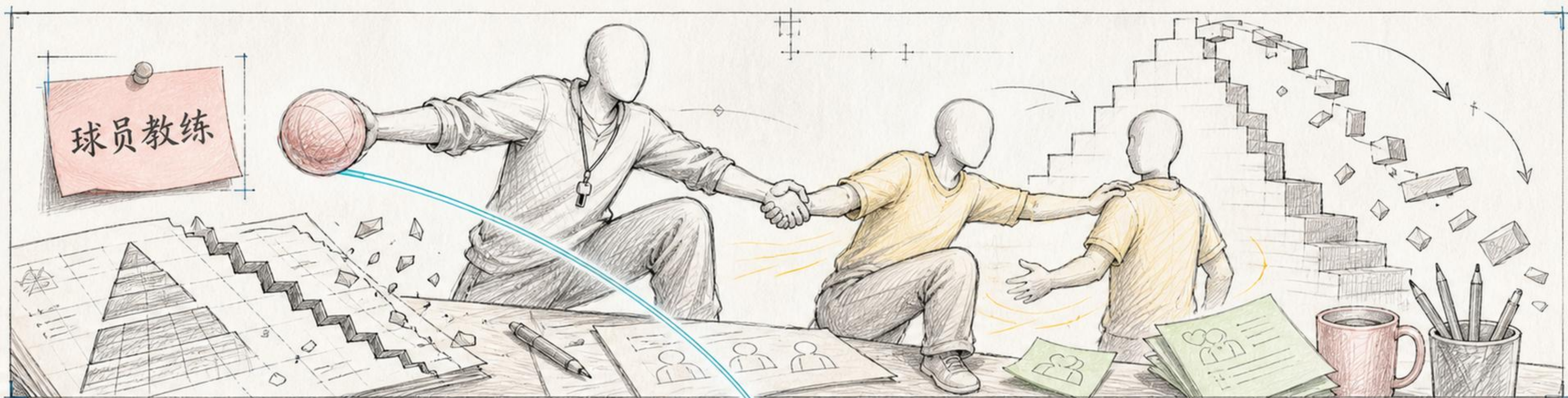
智能层

直接获得上下文

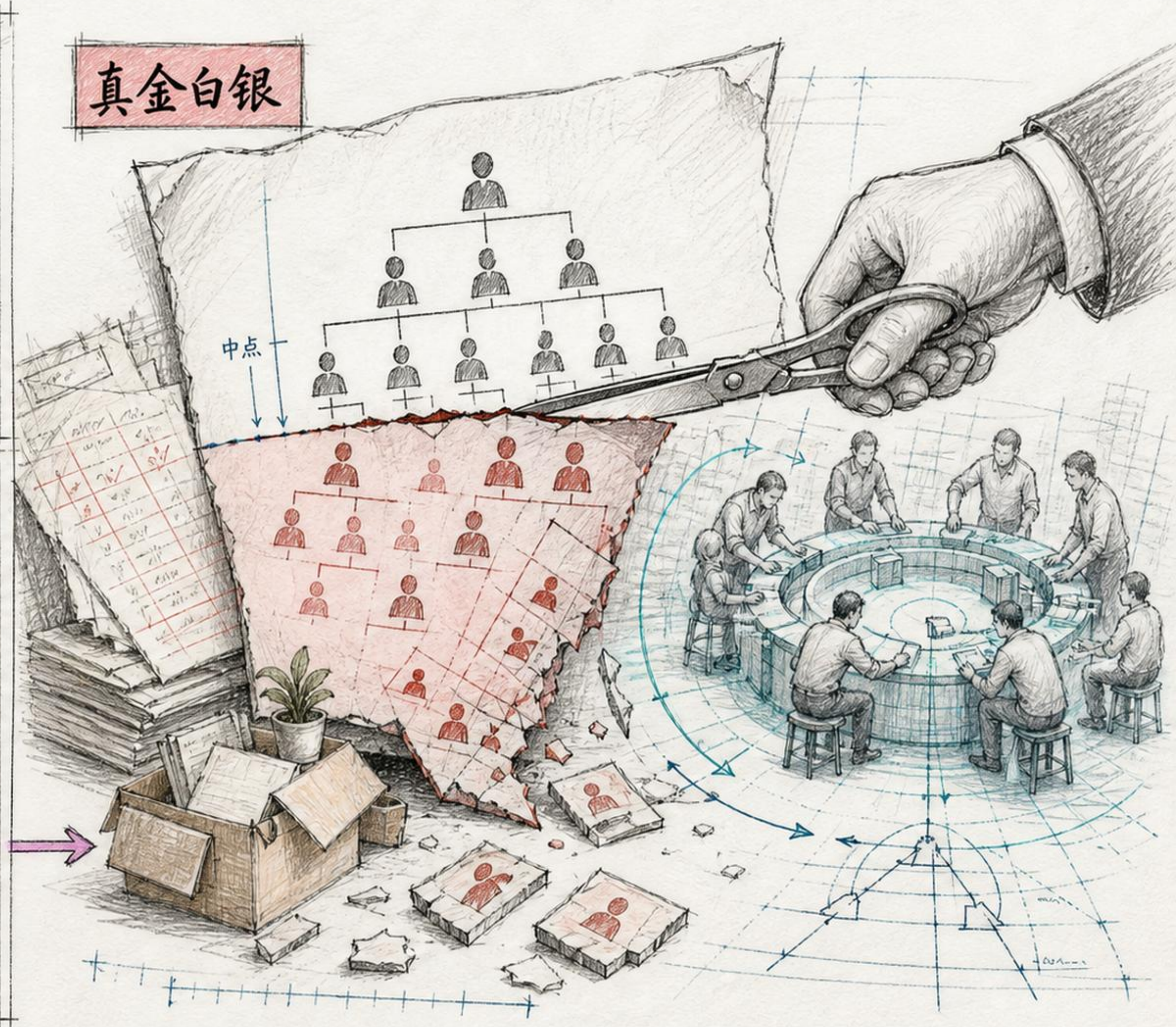
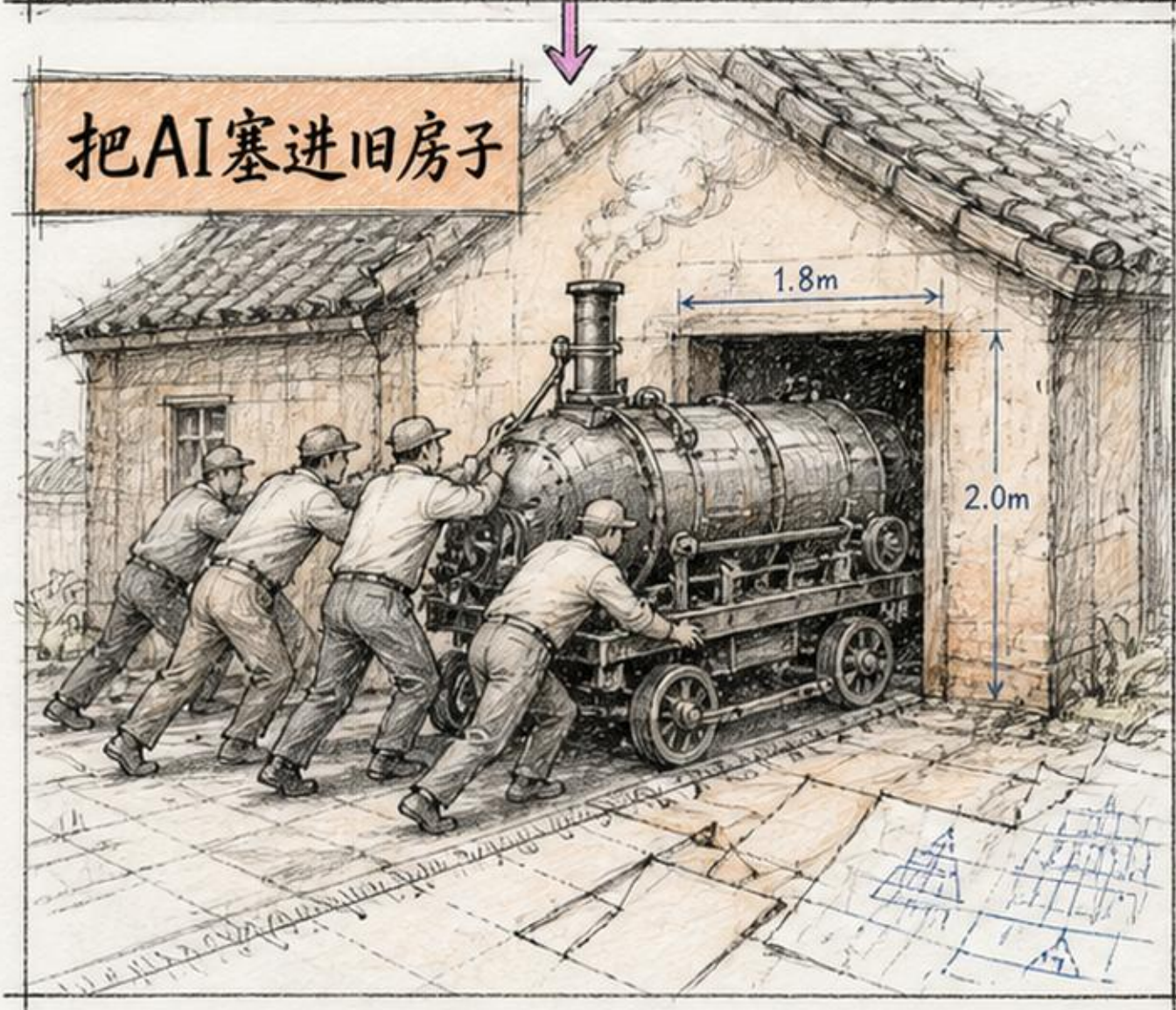
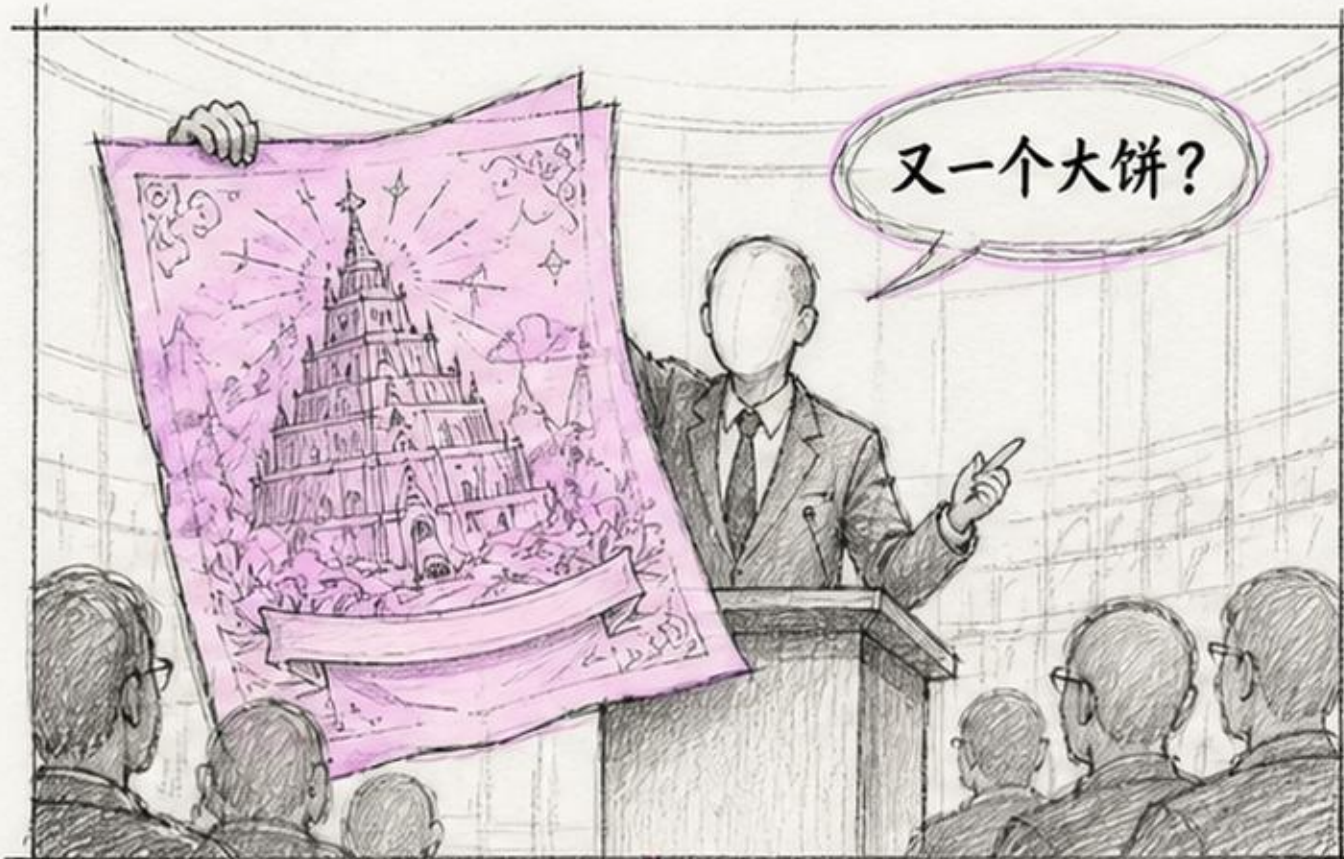




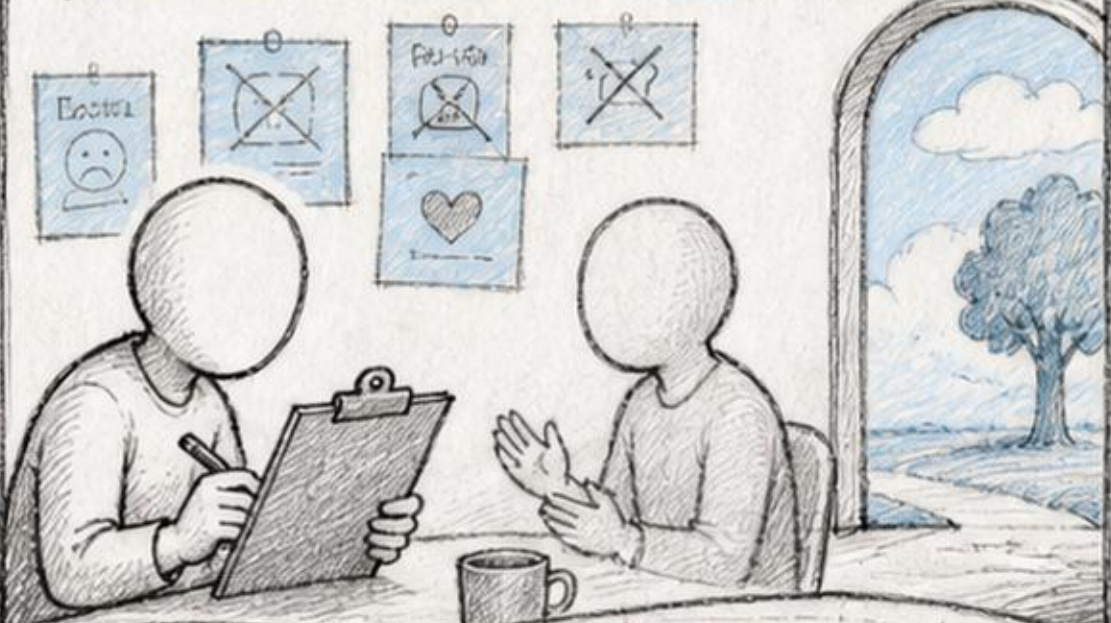
球员教练



AI在圆心，人在外围



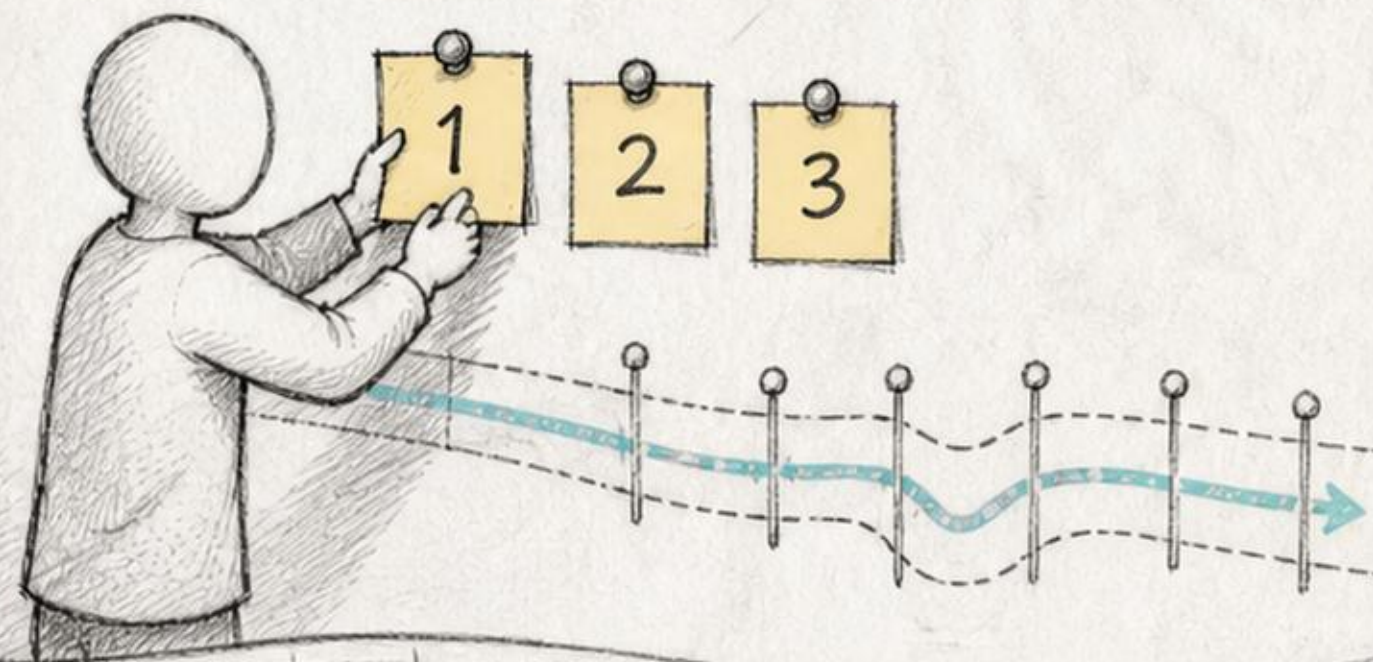
用户调研



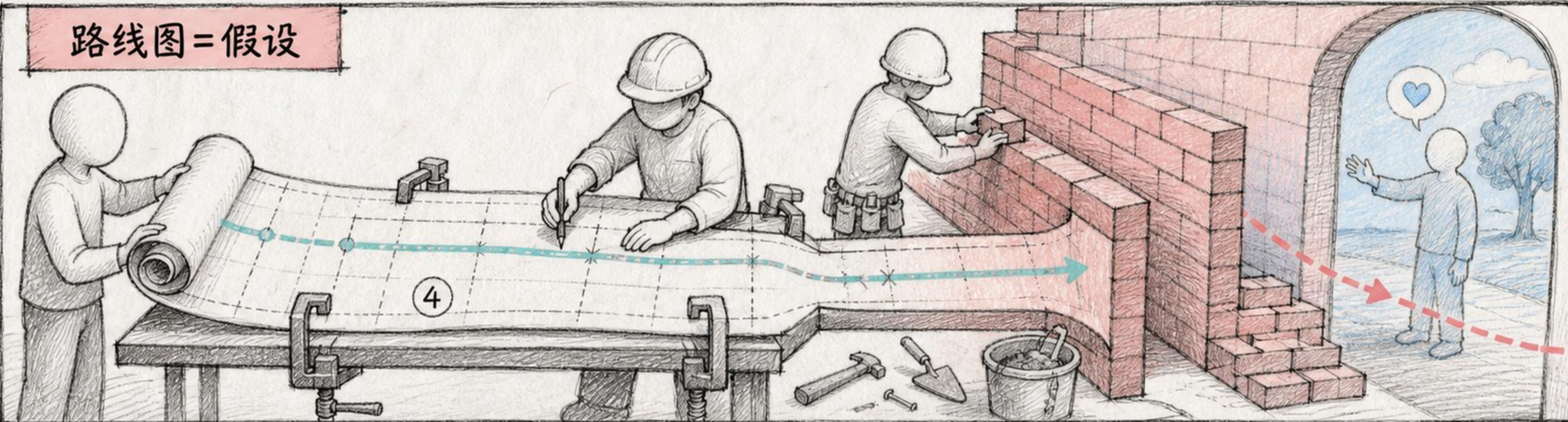
需求文档

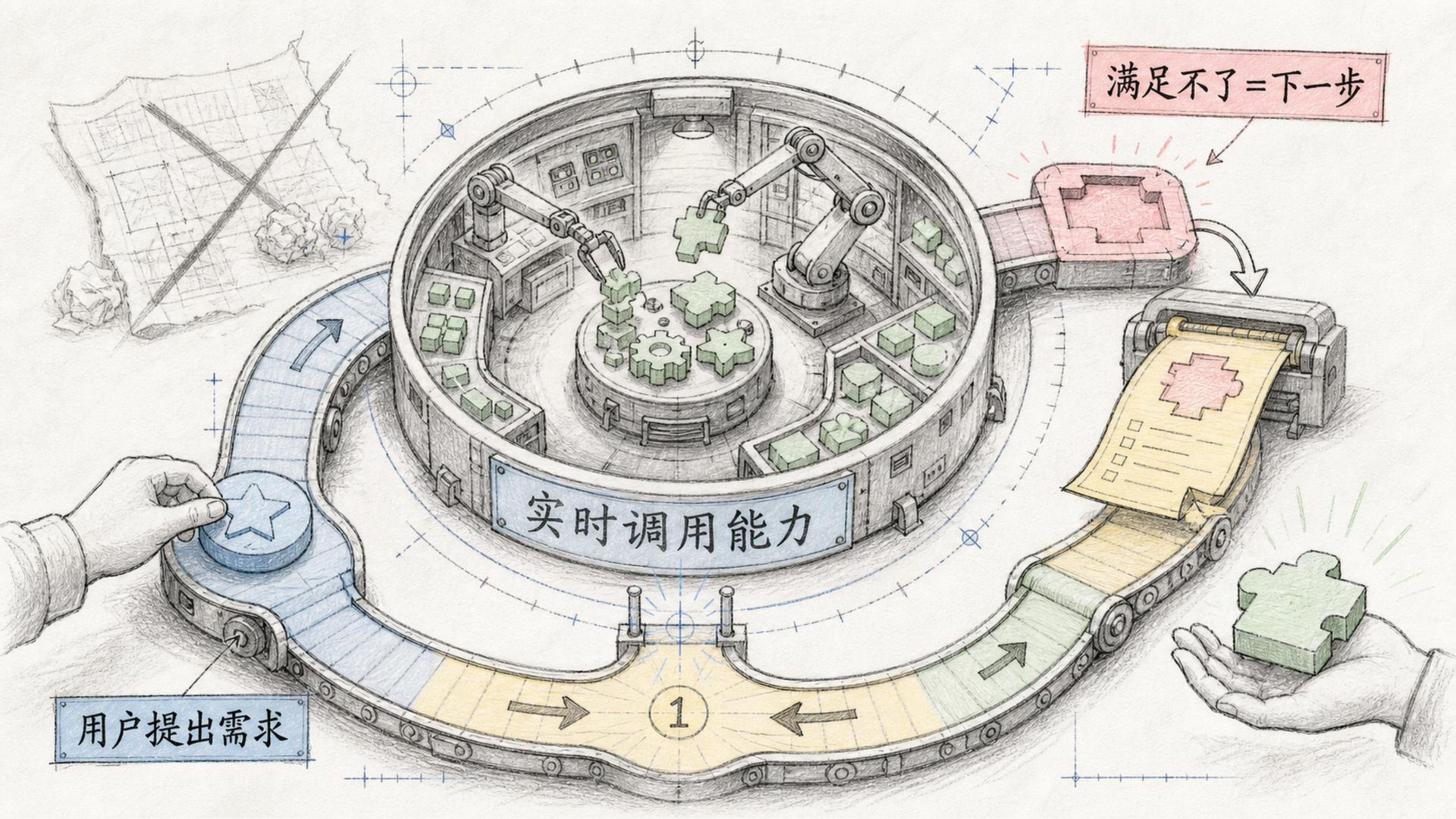


排优先级



路线图=假设





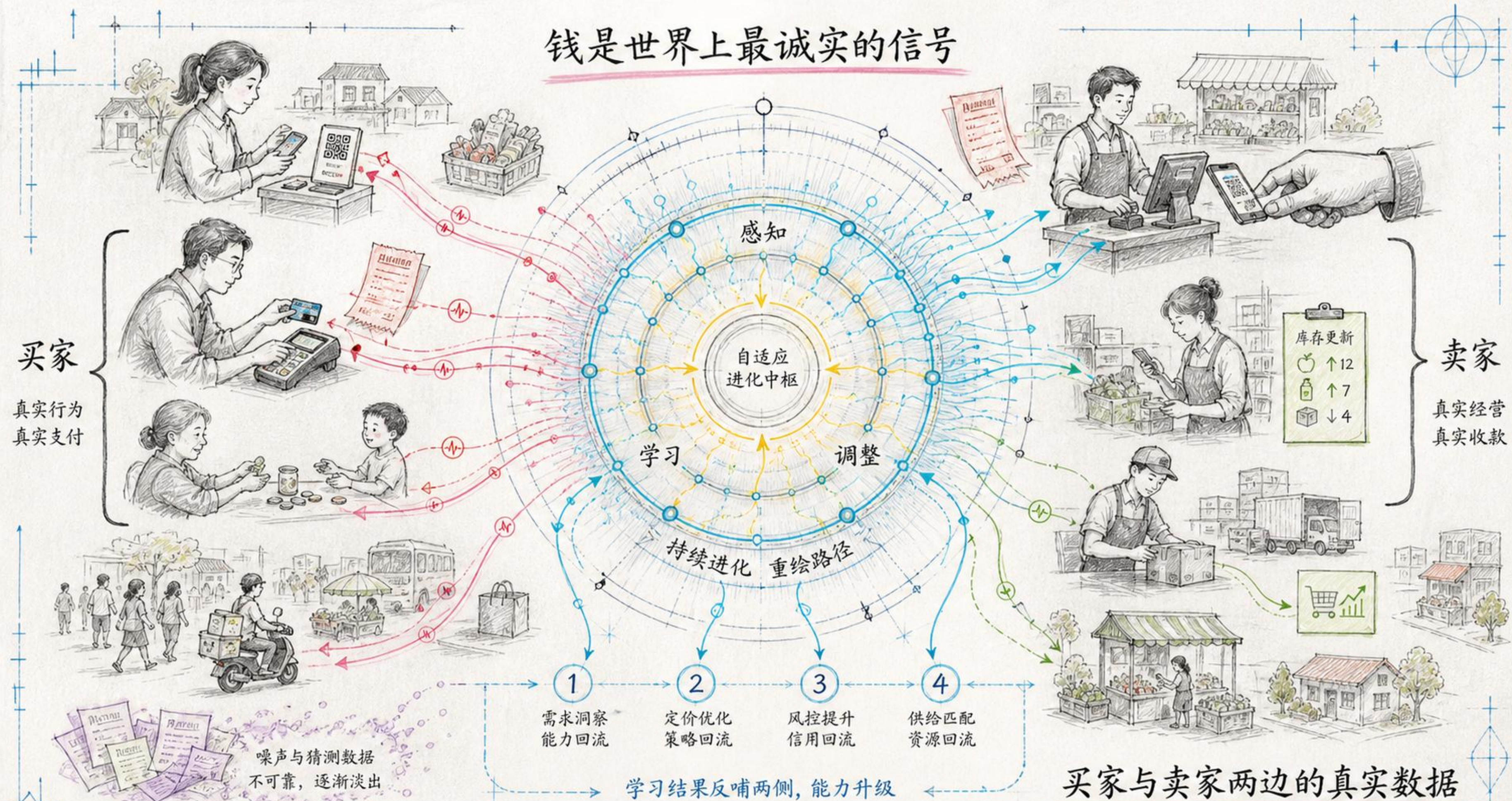
满足不了=下一步

实时调用能力

用户提出需求

1

钱是世界上最诚实的信号



正常运行

监管合规

六千人

增长与重建

$$\begin{aligned} N &= R + C + G \\ R &\geq 1 + \alpha N \\ C &\geq \beta N + \gamma \\ G &\geq \delta N + \epsilon \end{aligned}$$

$$N \geq 5000$$

$$N = ?$$

$$\begin{aligned} N &= 5000 \\ N &= 5500 \end{aligned}$$

$$N = 5000 \quad \times$$

$$N = 5500 \quad \times$$

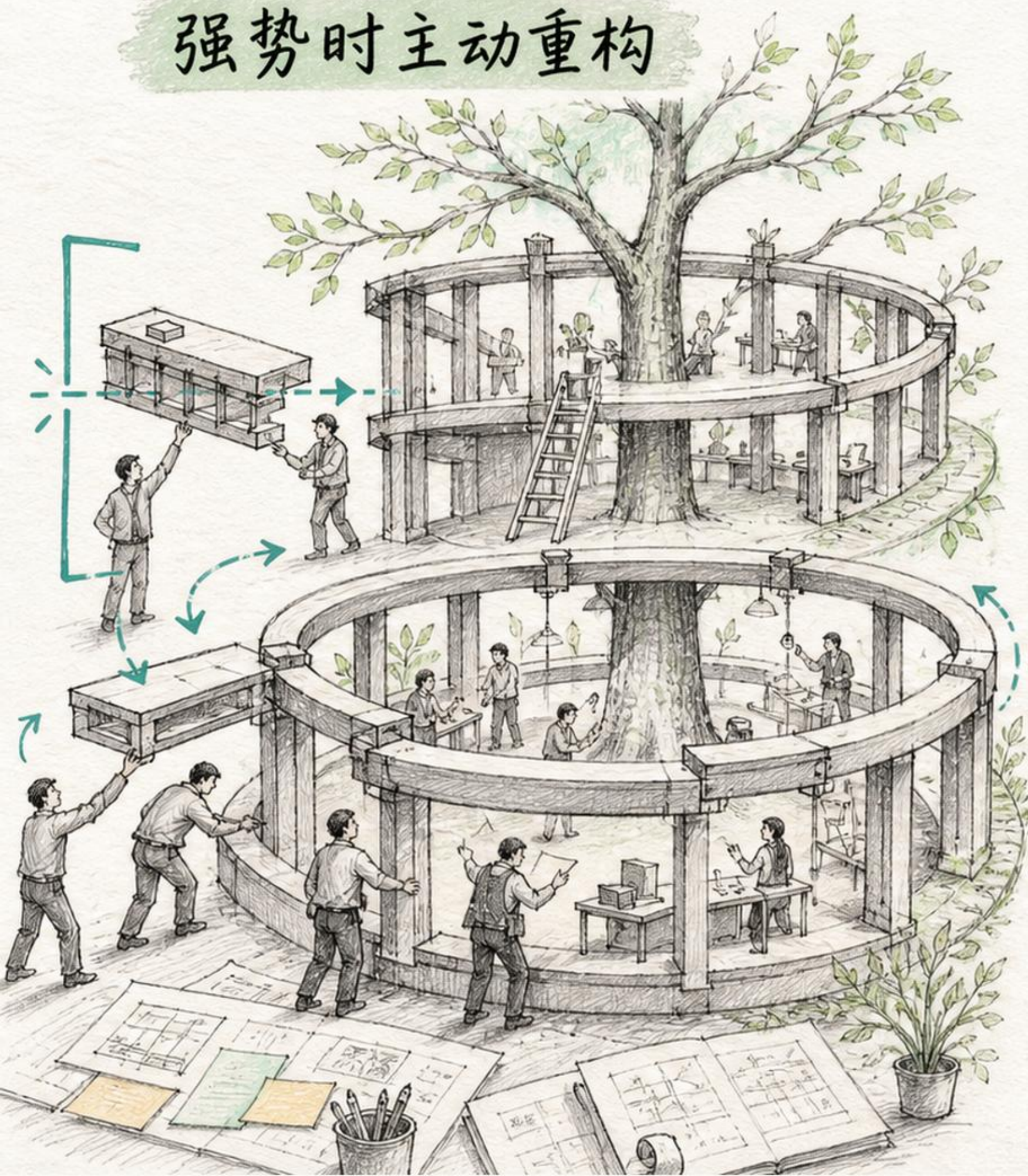
$$N = 6000 \quad \checkmark$$

最小可行解

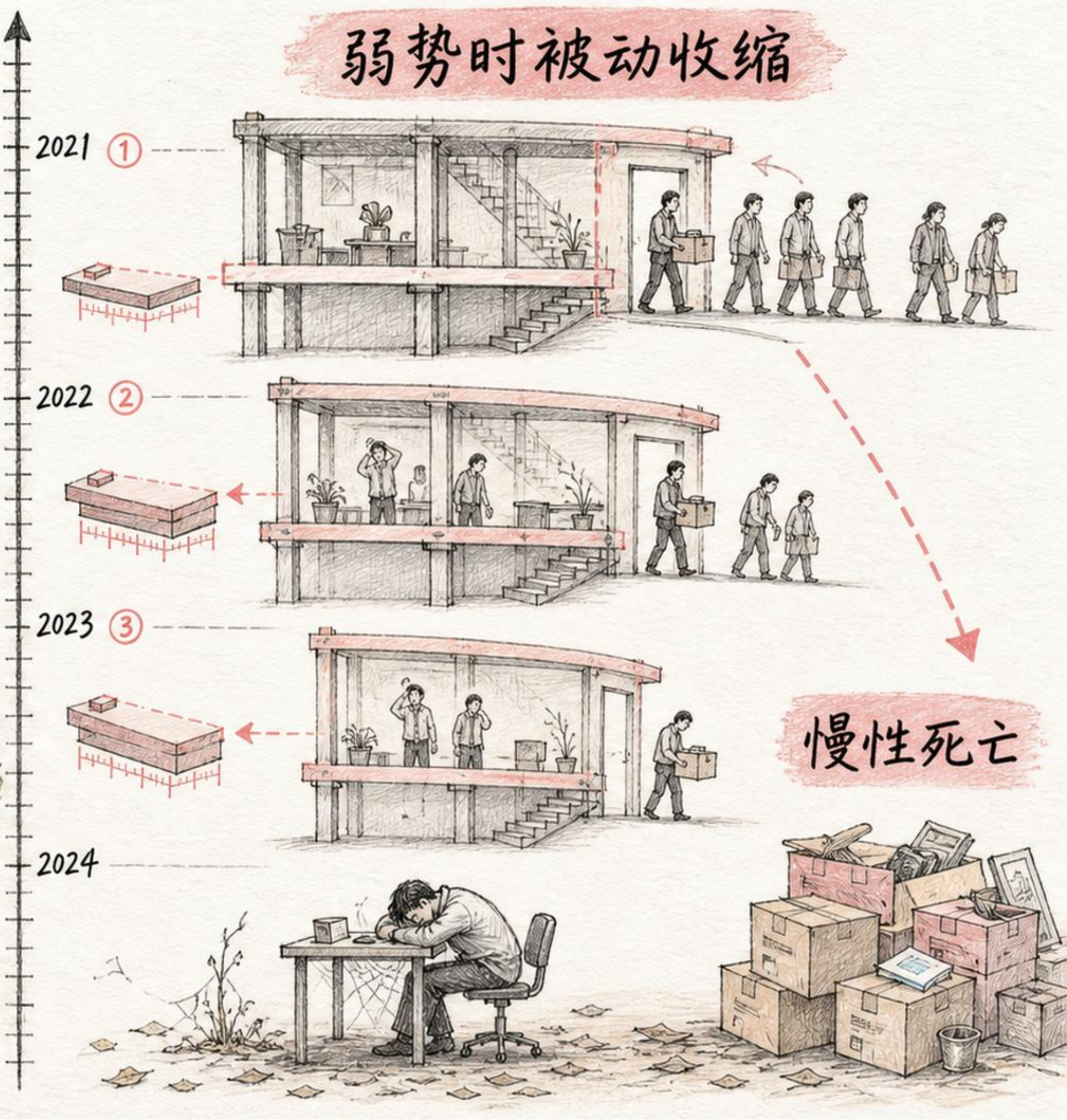
$$\begin{aligned} R + C + G \\ &= N \end{aligned}$$

→ 最小化 N
且三者成立

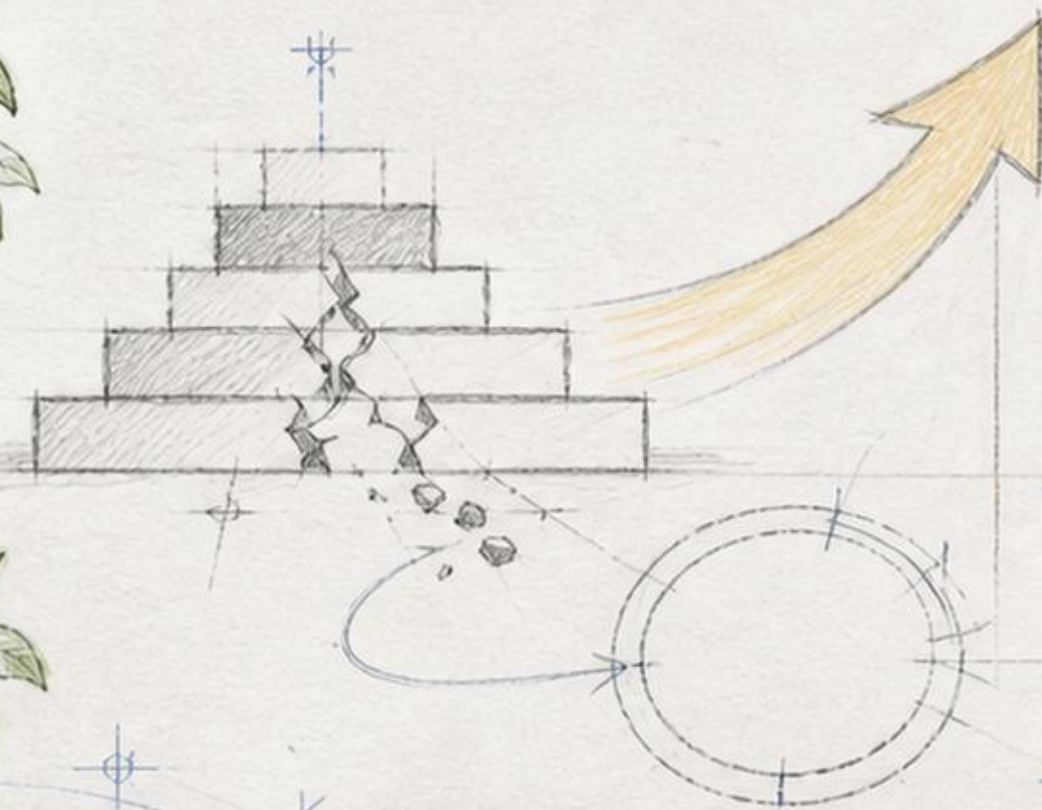
强势时主动重构



弱势时被动收缩



62.5亿美元



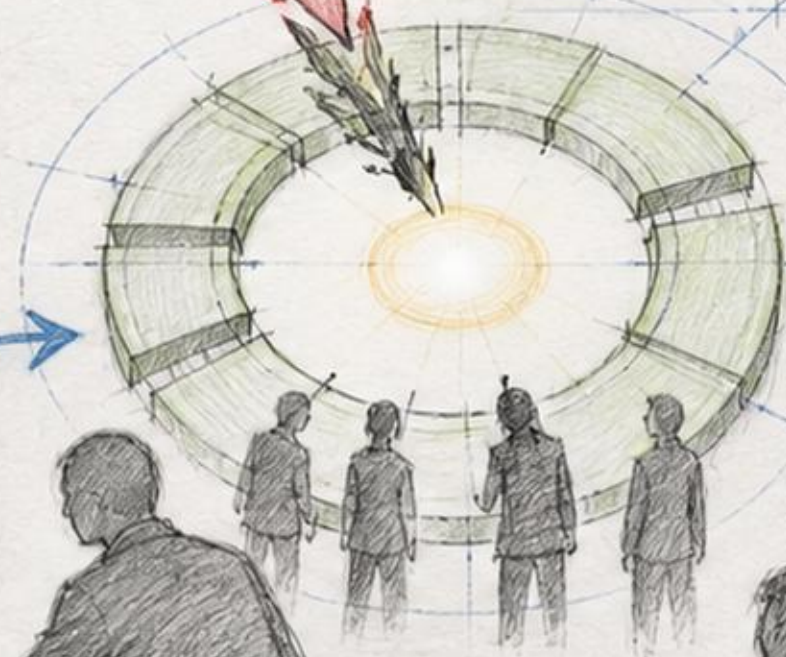
毛利同比 +24%

不到三周

第1周

第2周

第3周

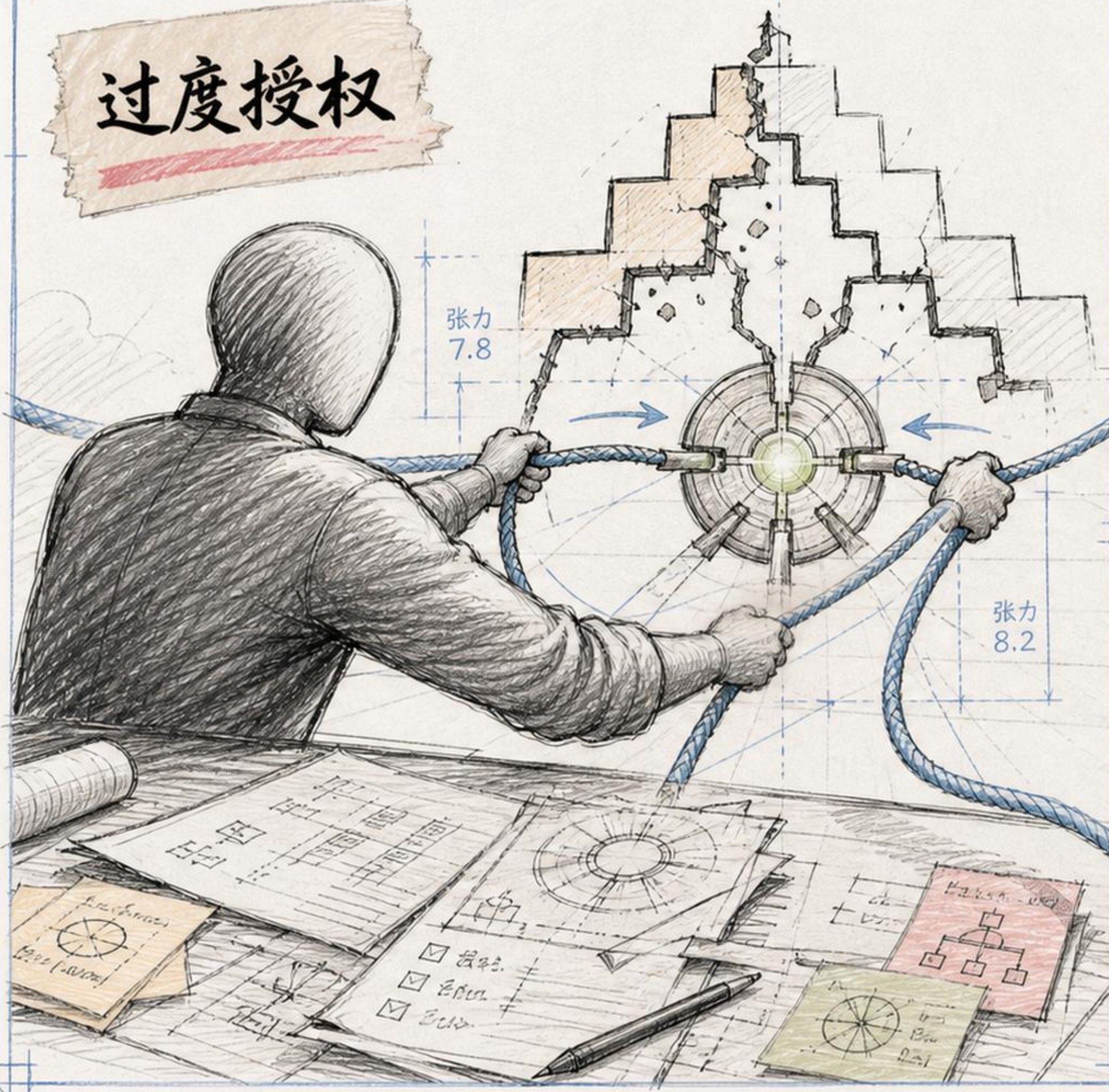


董事会高度支持

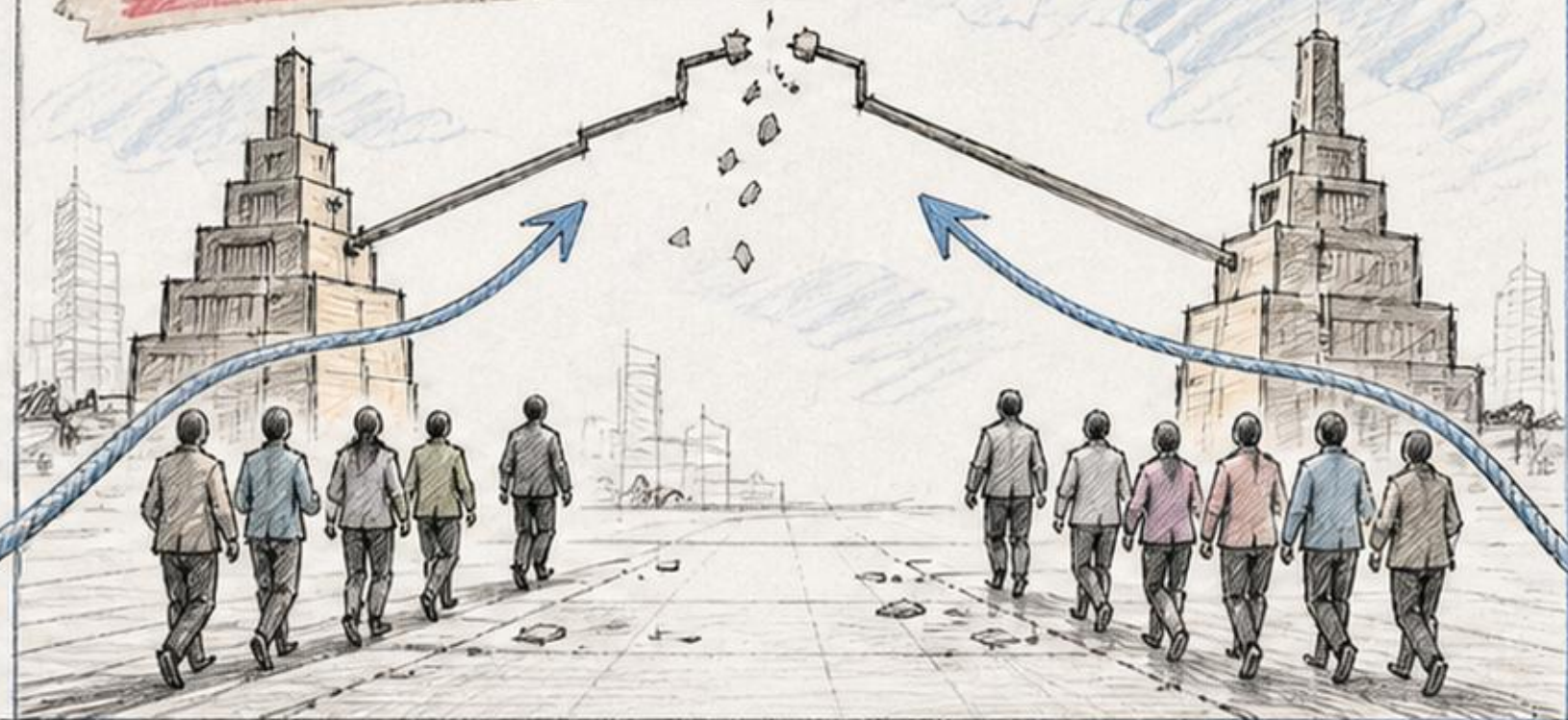
- ✓ *Good & complete information*
- ✓ *Good cooperation*
- ✓ *Good communication*
- ✓ *Good result*



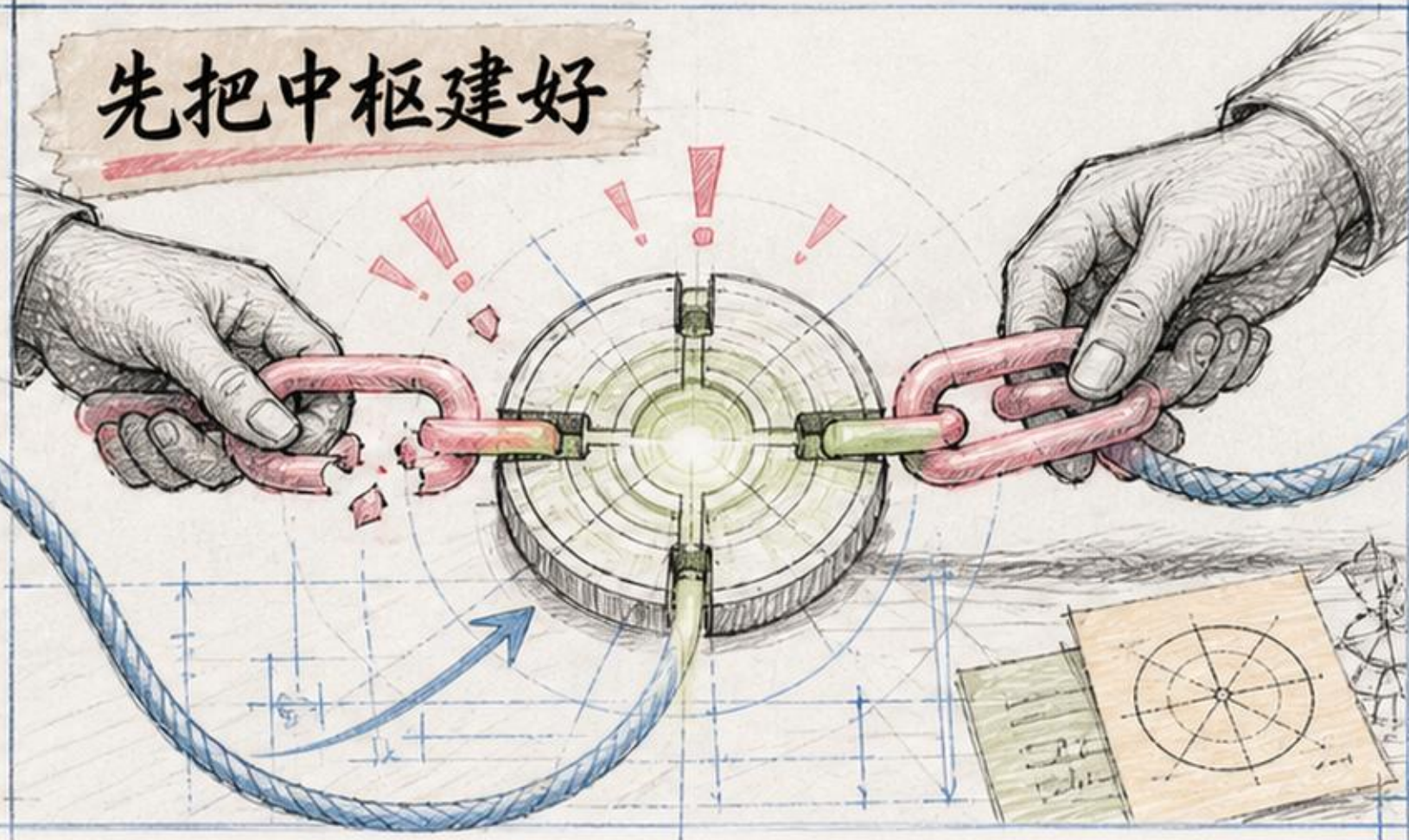
过度授权



松散的控股公司



先把中枢建好

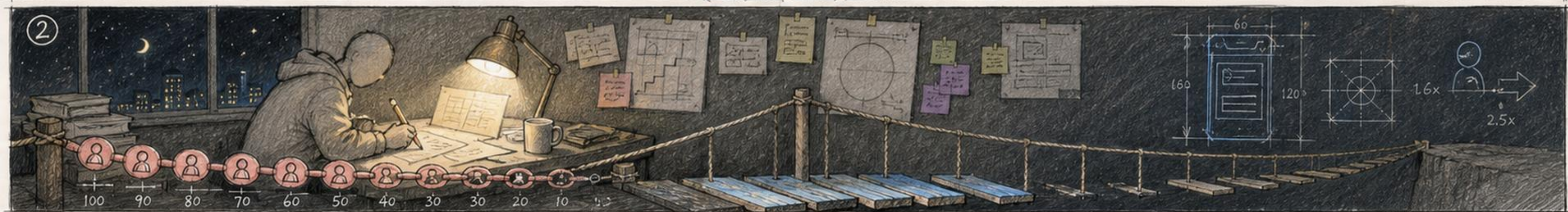


①

几乎所有人都反对

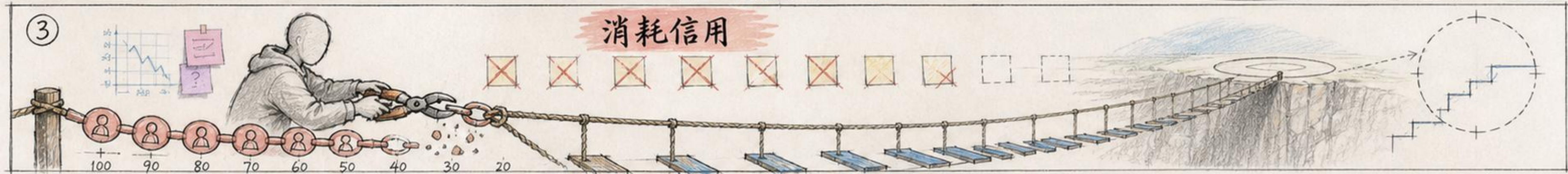


②



③

消耗信用



④

多个创始时刻

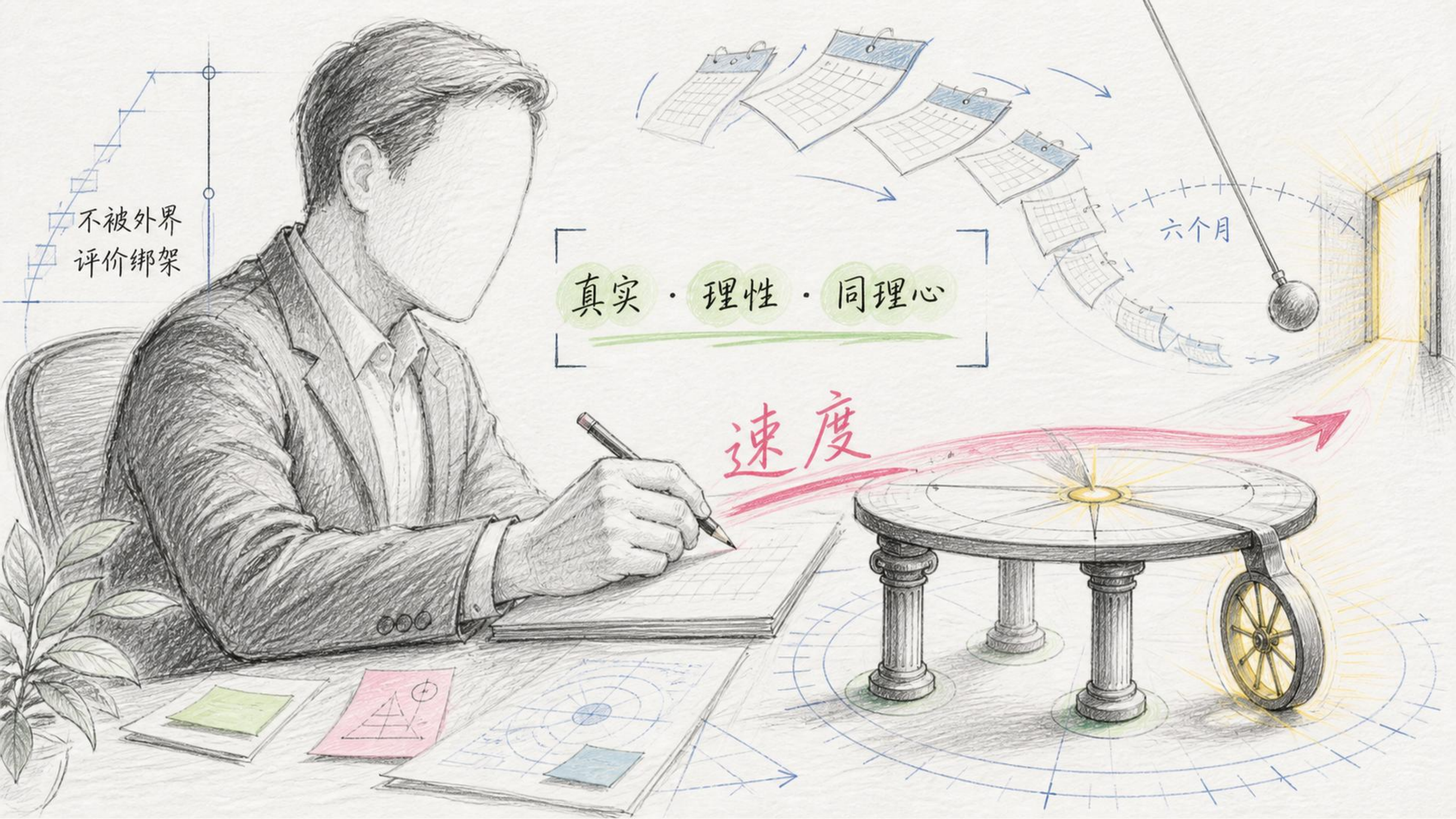


不被外界
评价绑架

真实 · 理性 · 同理心

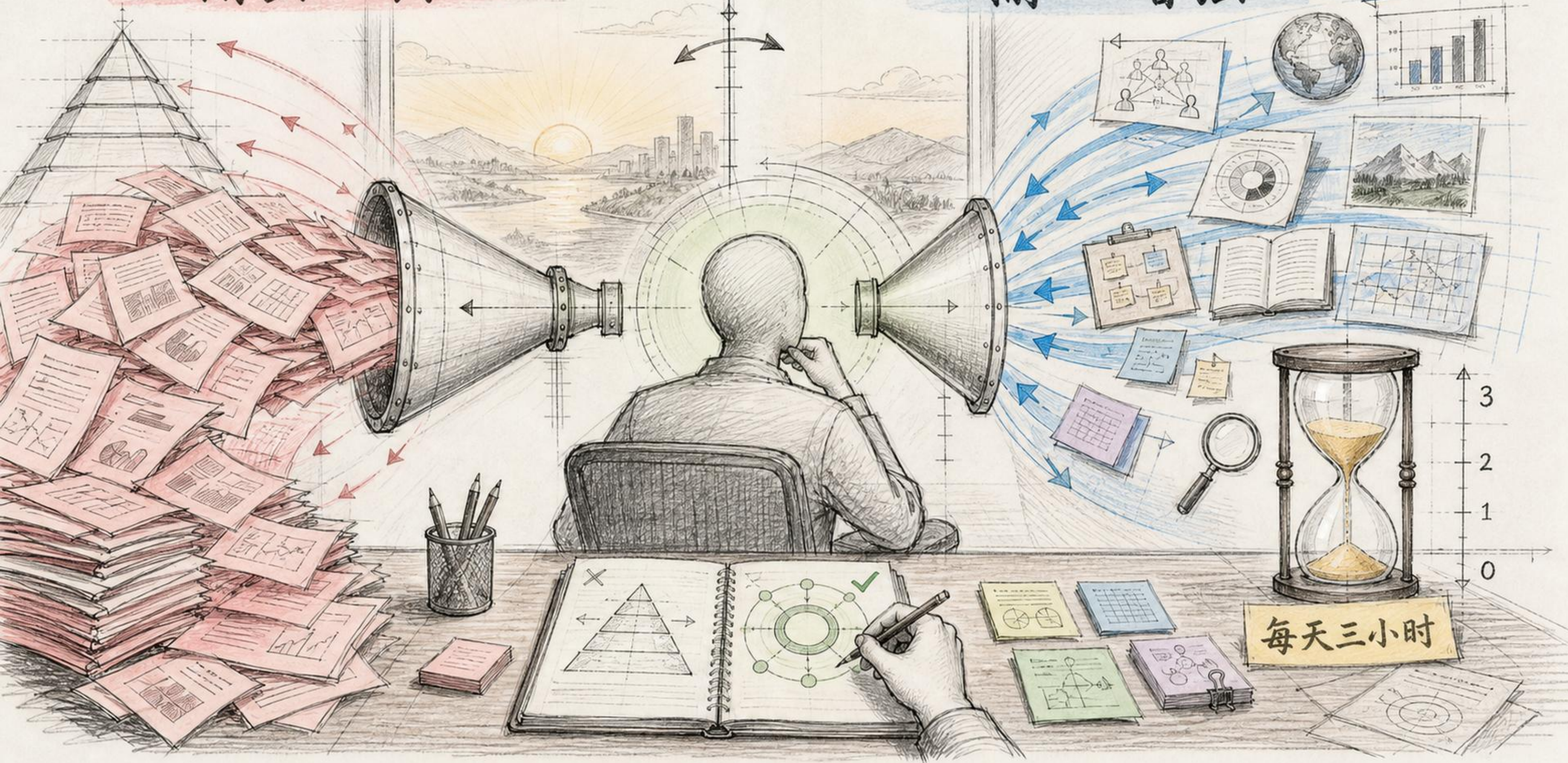
速度

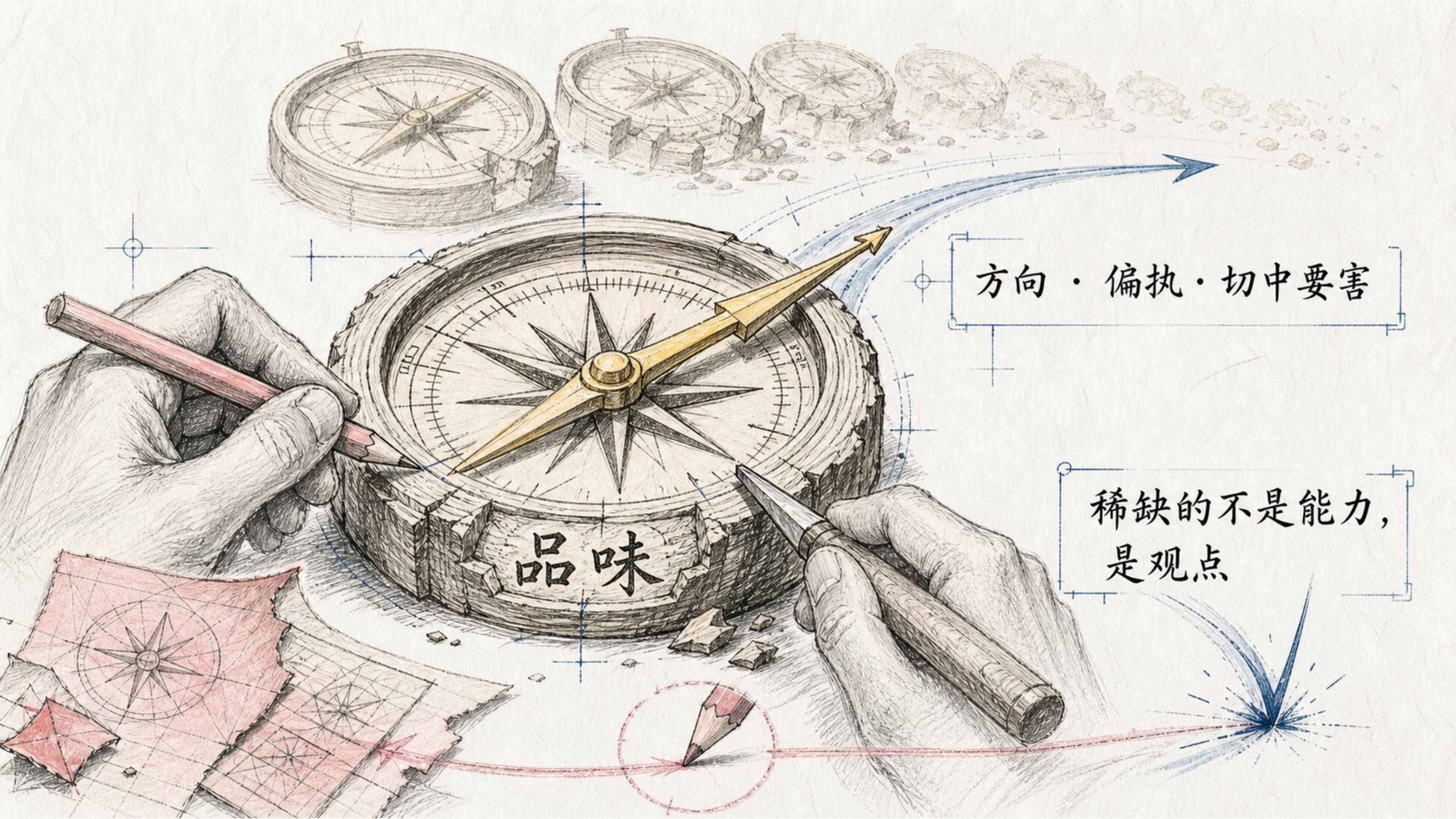
六个月



输出工具

输入增强



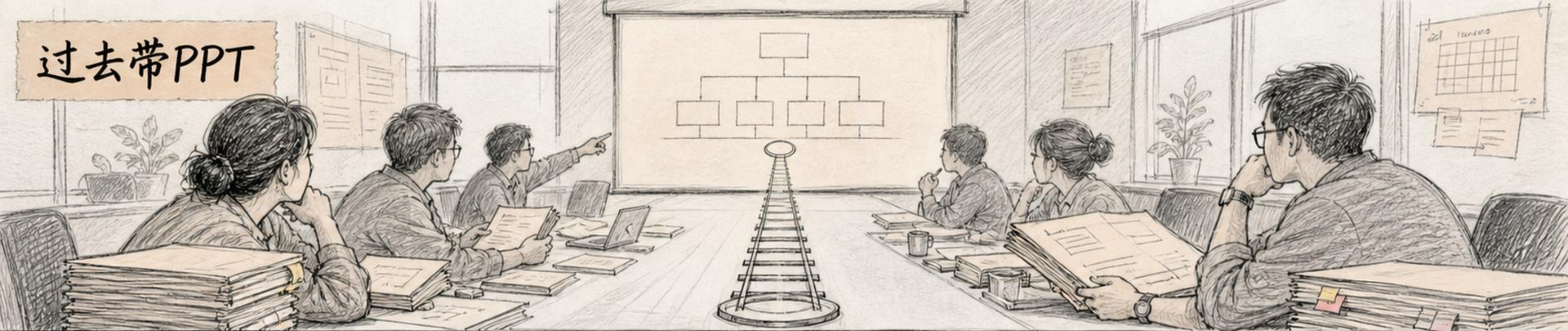


方向 · 偏执 · 切中要害

稀缺的不是能力，
是观点

品味

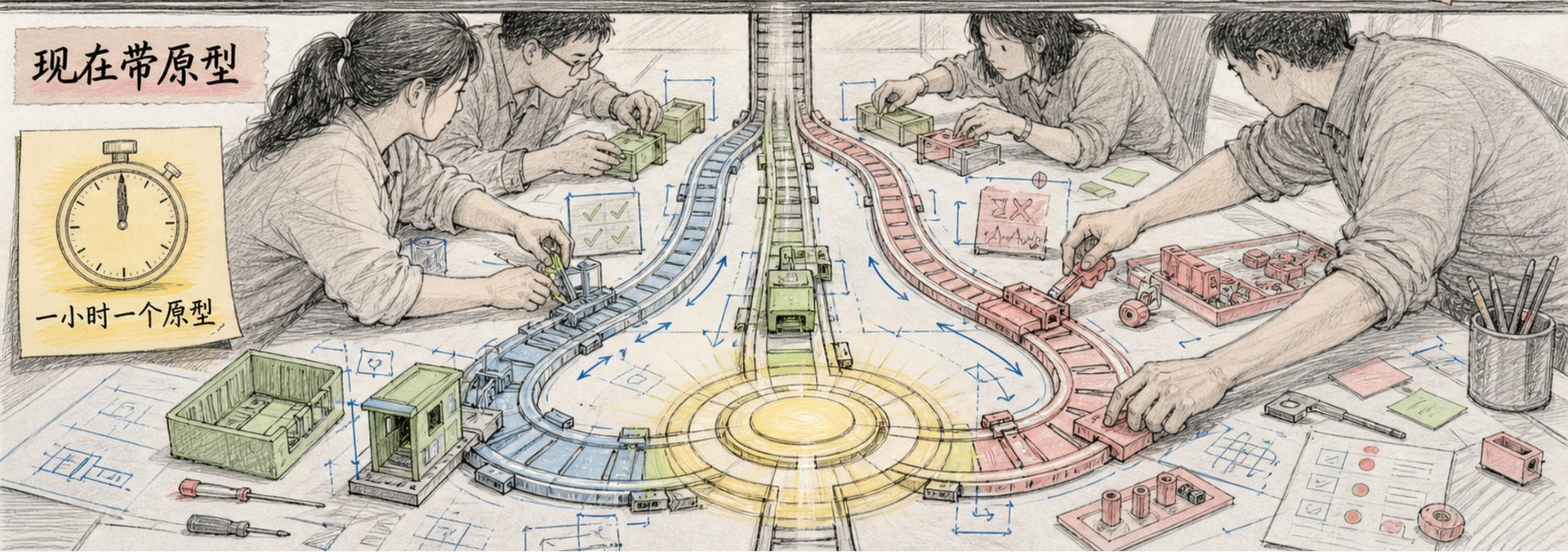
过去带PPT



现在带原型



一小时一个原型



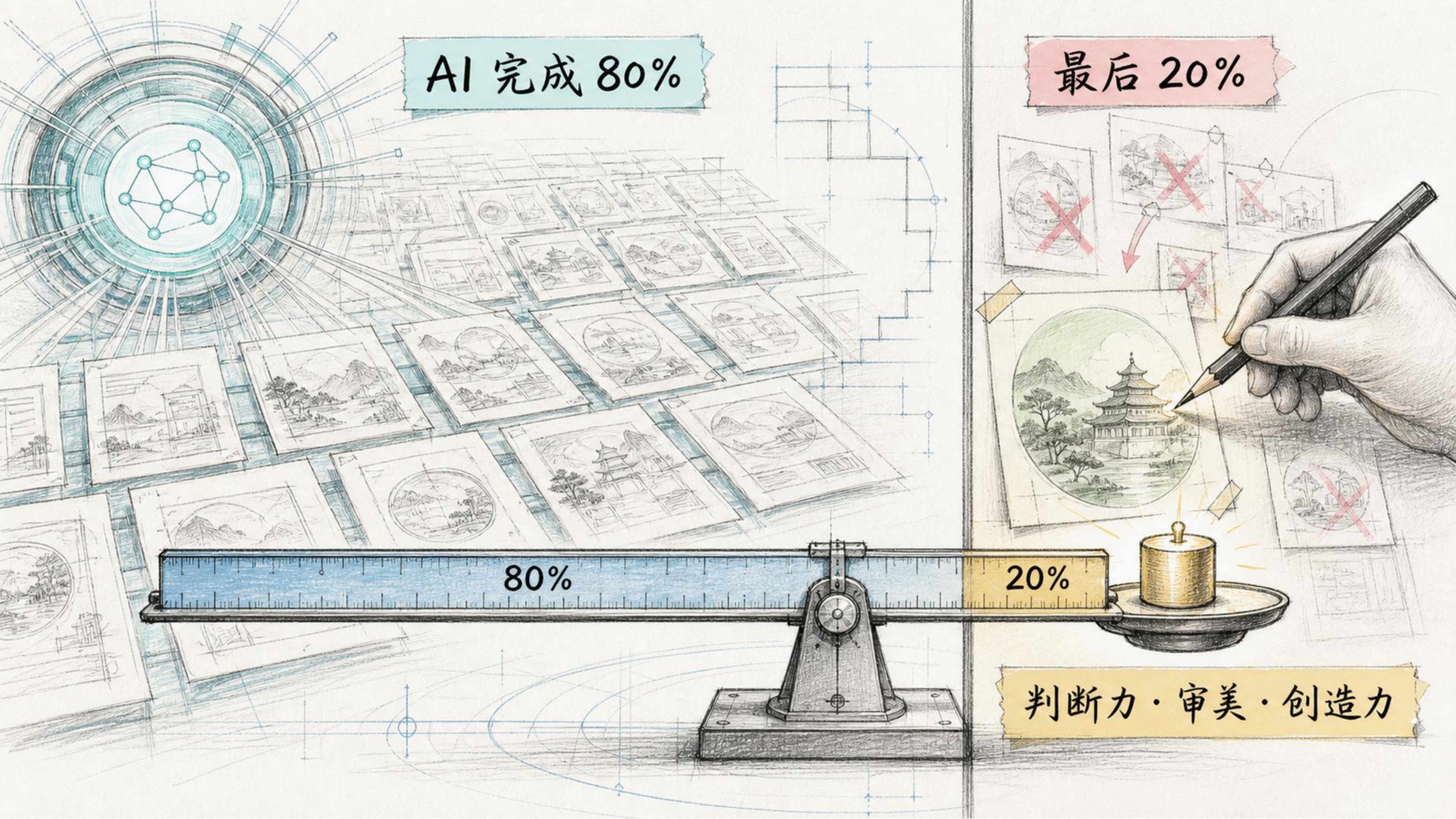
AI 完成 80%

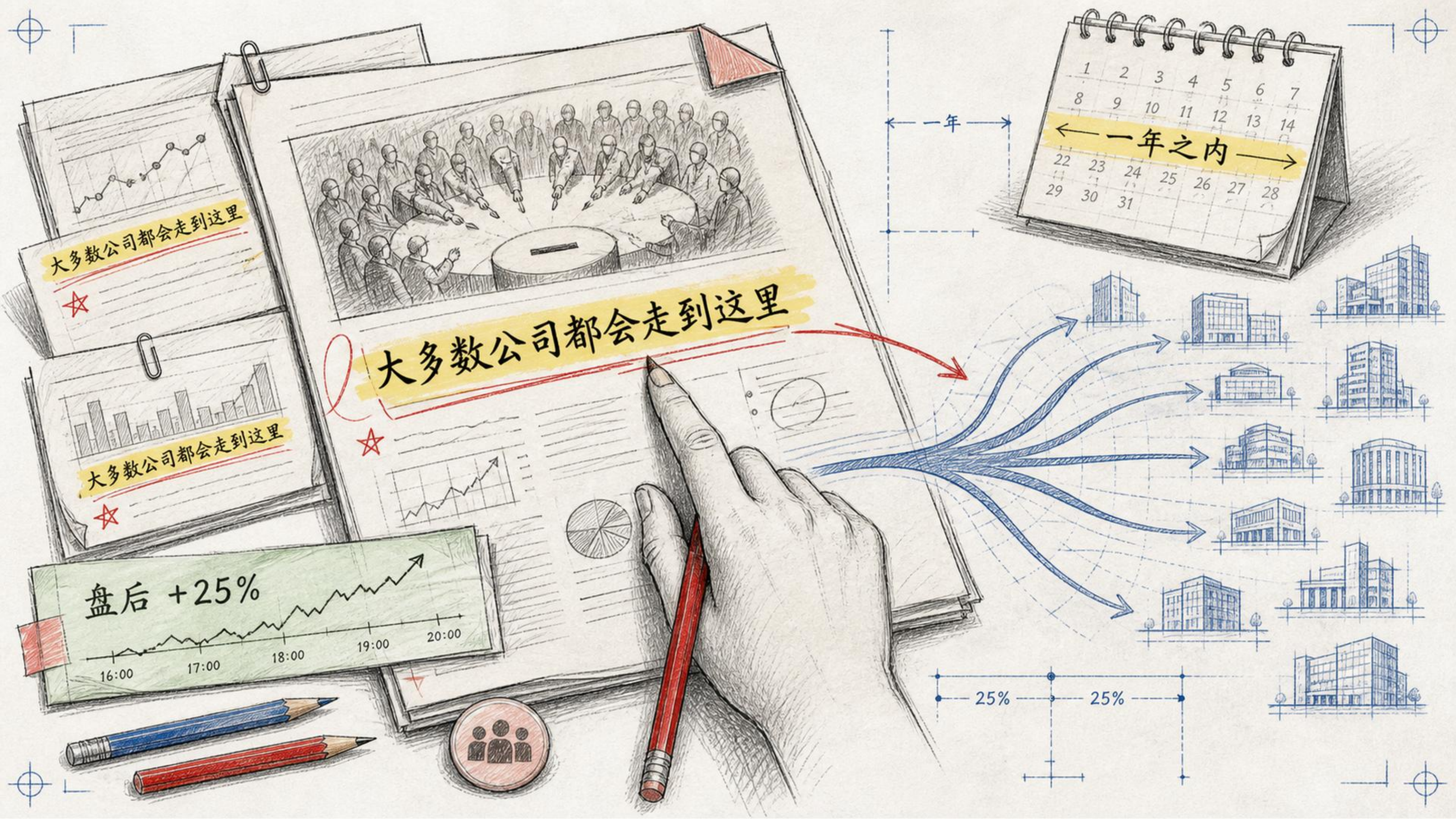
最后 20%

80%

20%

判断力 · 审美 · 创造力





大多数公司都会走到这里

大多数公司都会走到这里

大多数公司都会走到这里

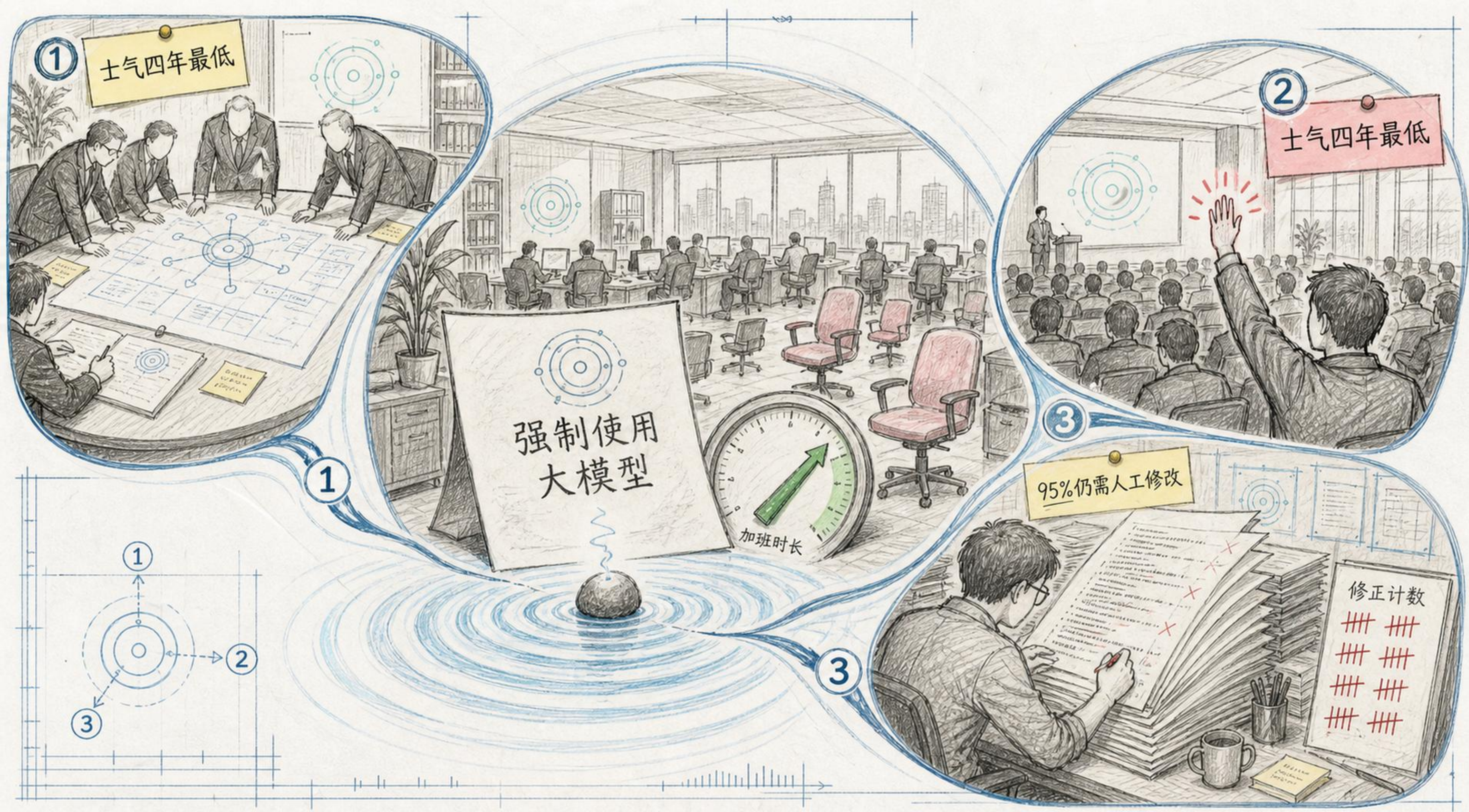
盘后 +25%

16:00 17:00 18:00 19:00 20:00

一年

一年之内

25% 25%



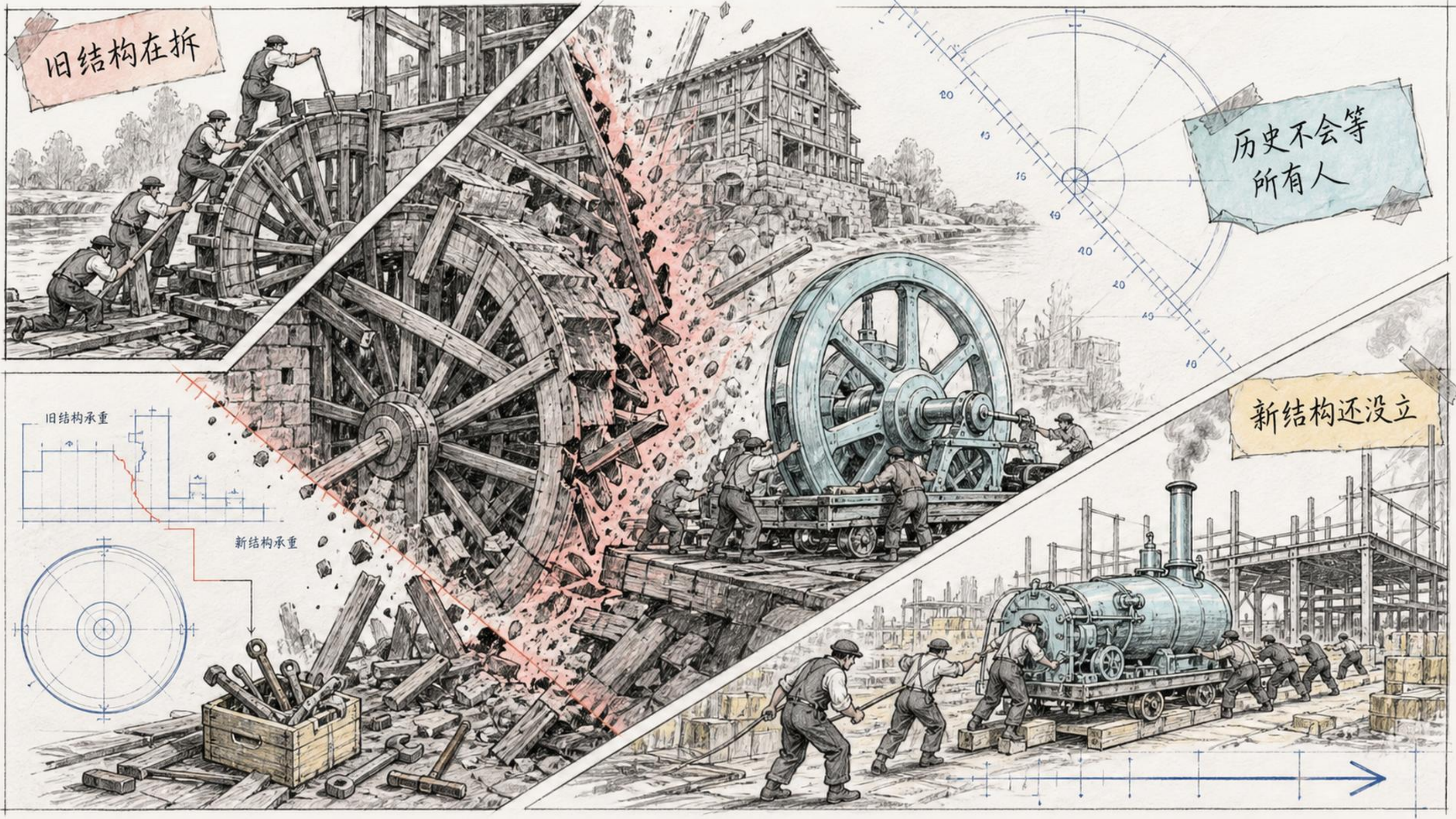
旧结构在拆

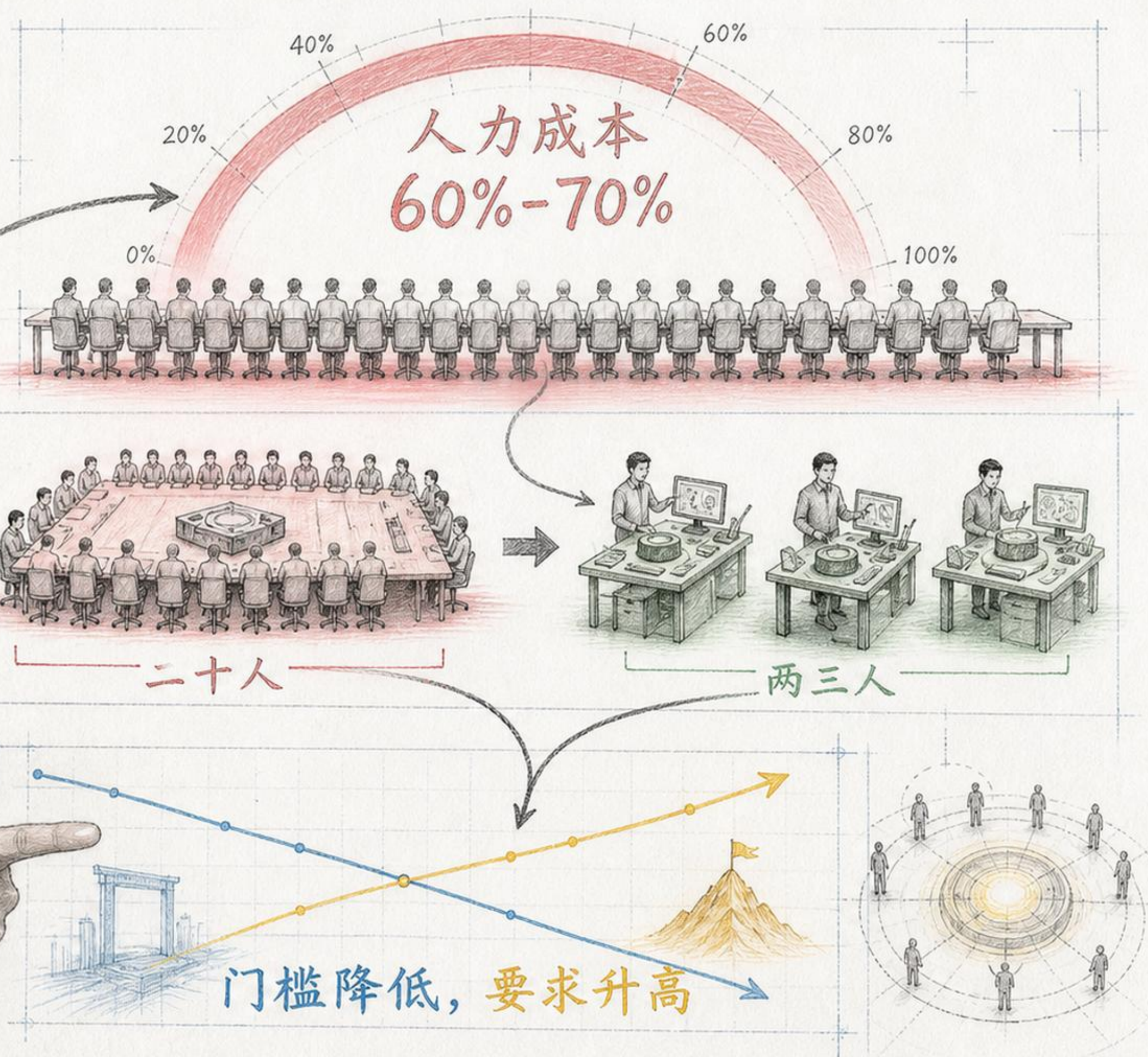
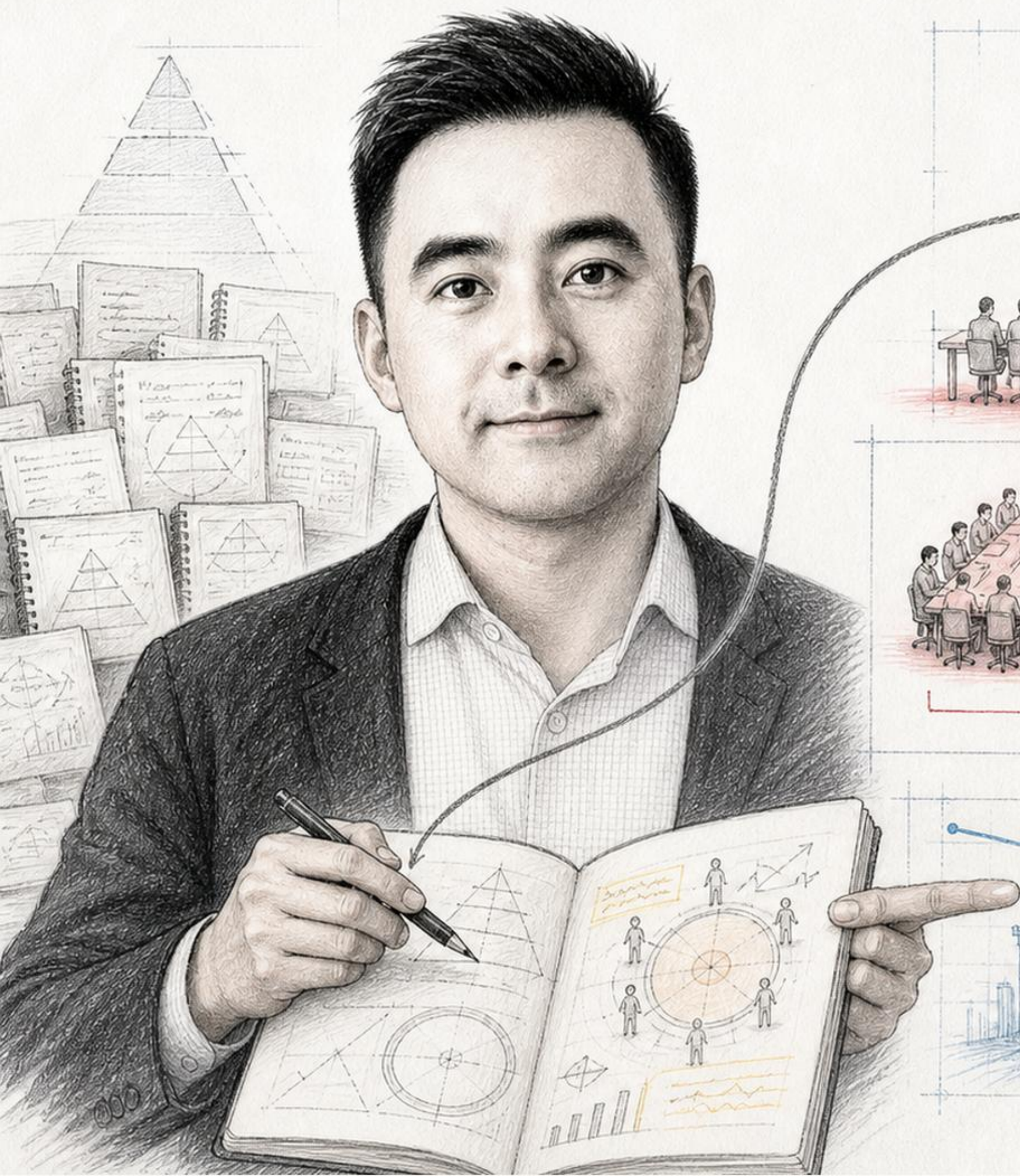
历史不会等
所有人

新结构还没立

旧结构承重

新结构承重







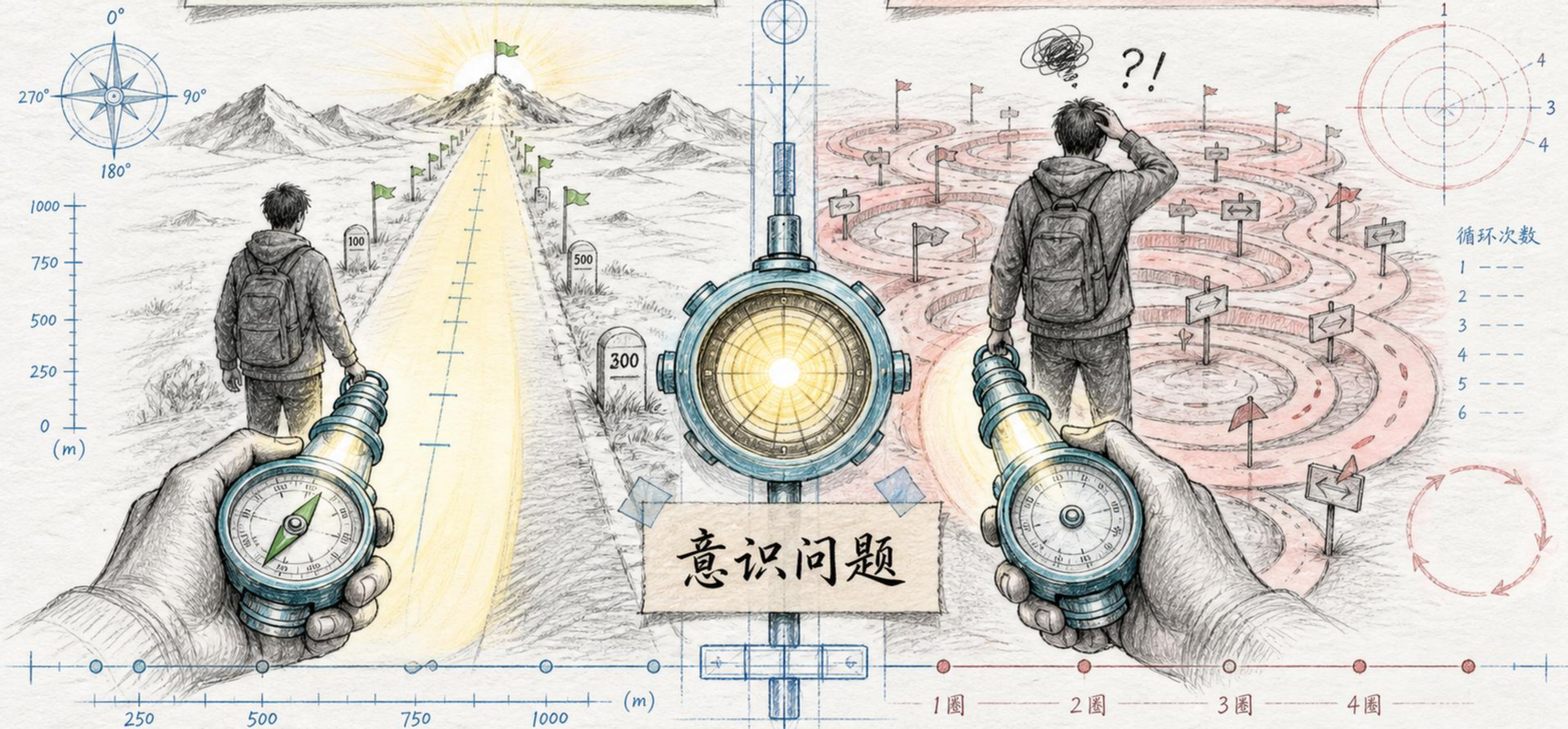
专注力

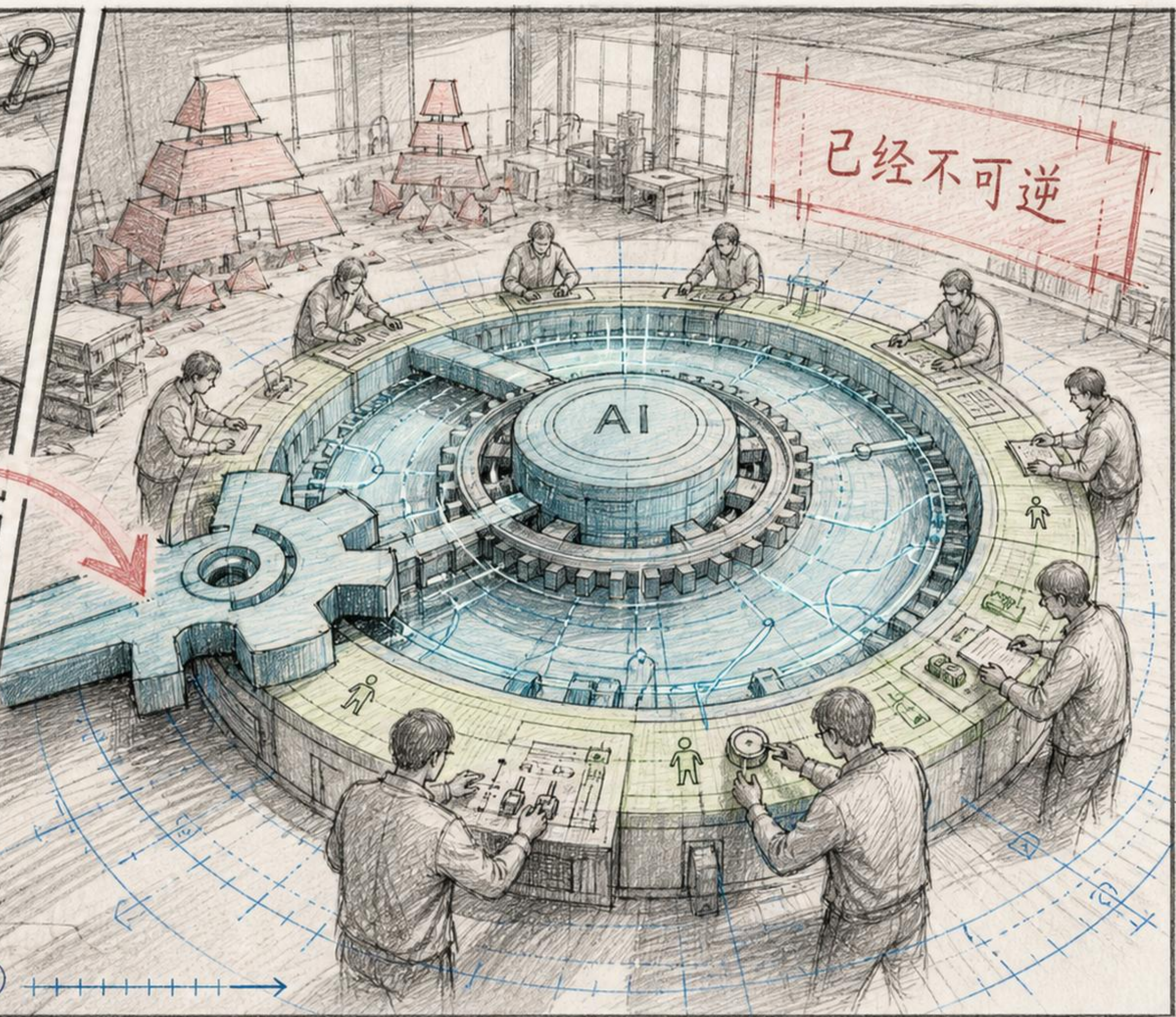
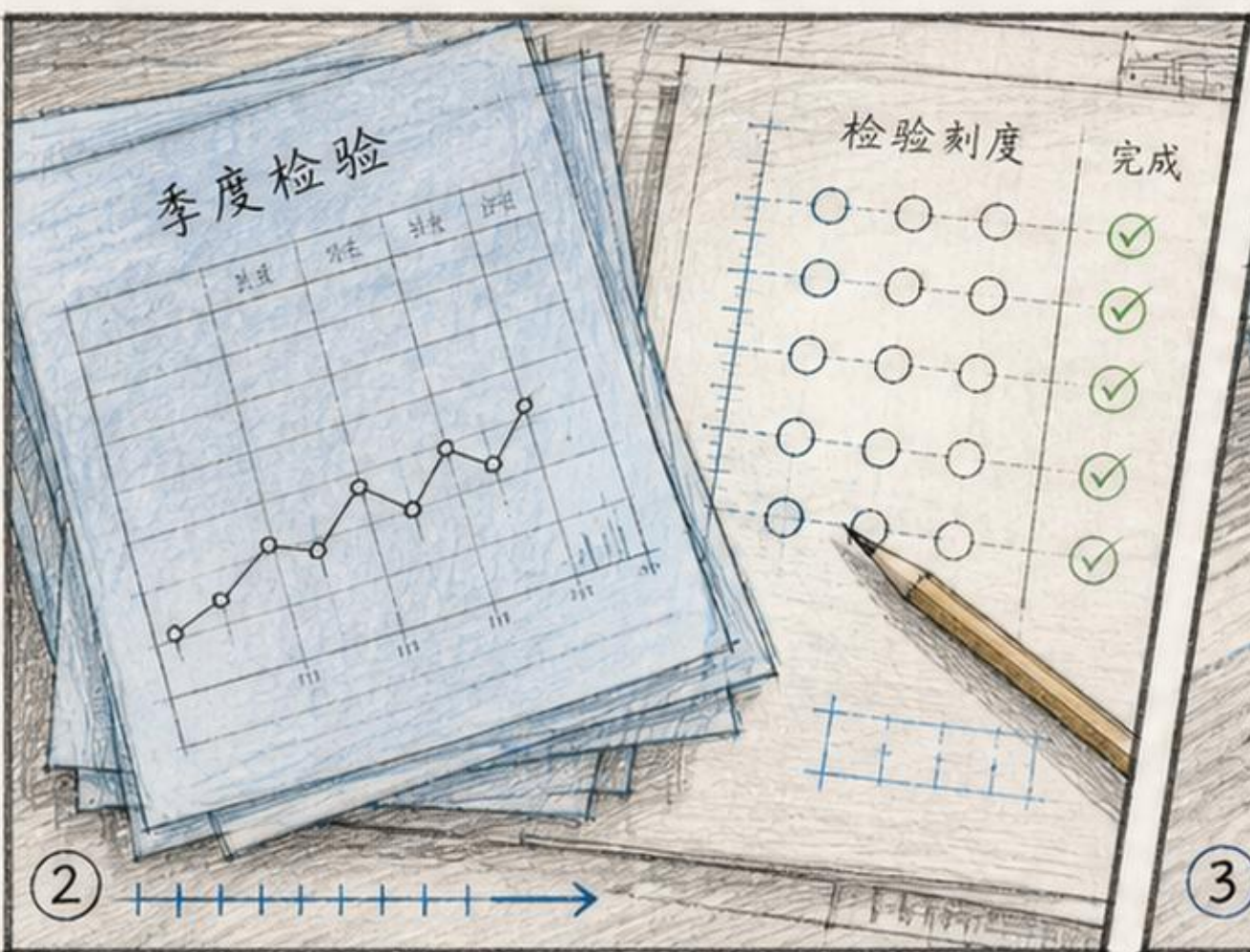
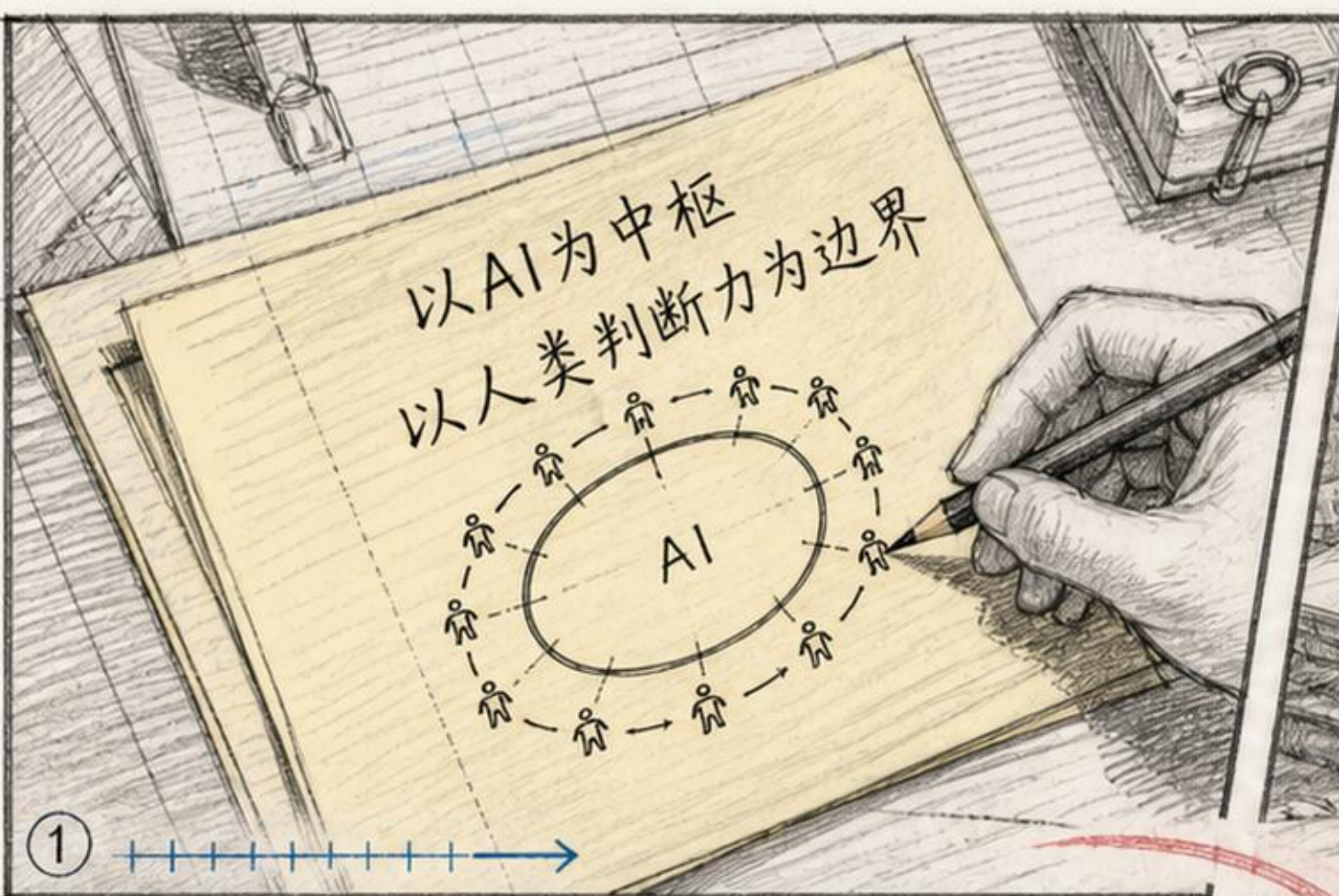
观察力

不立即反应

先有方向，工具才有用

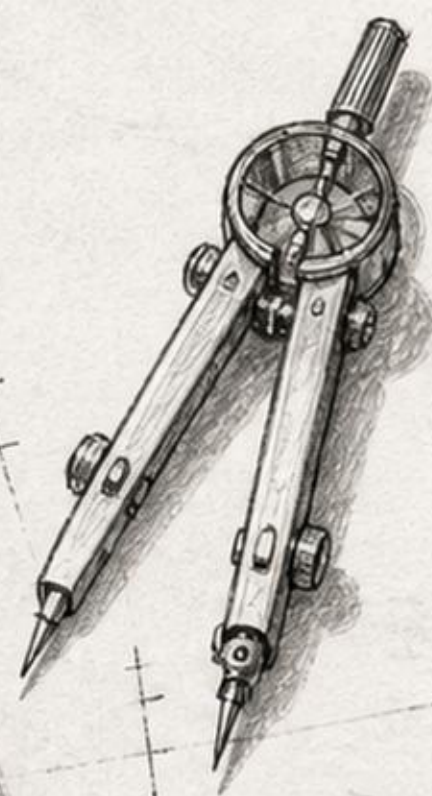
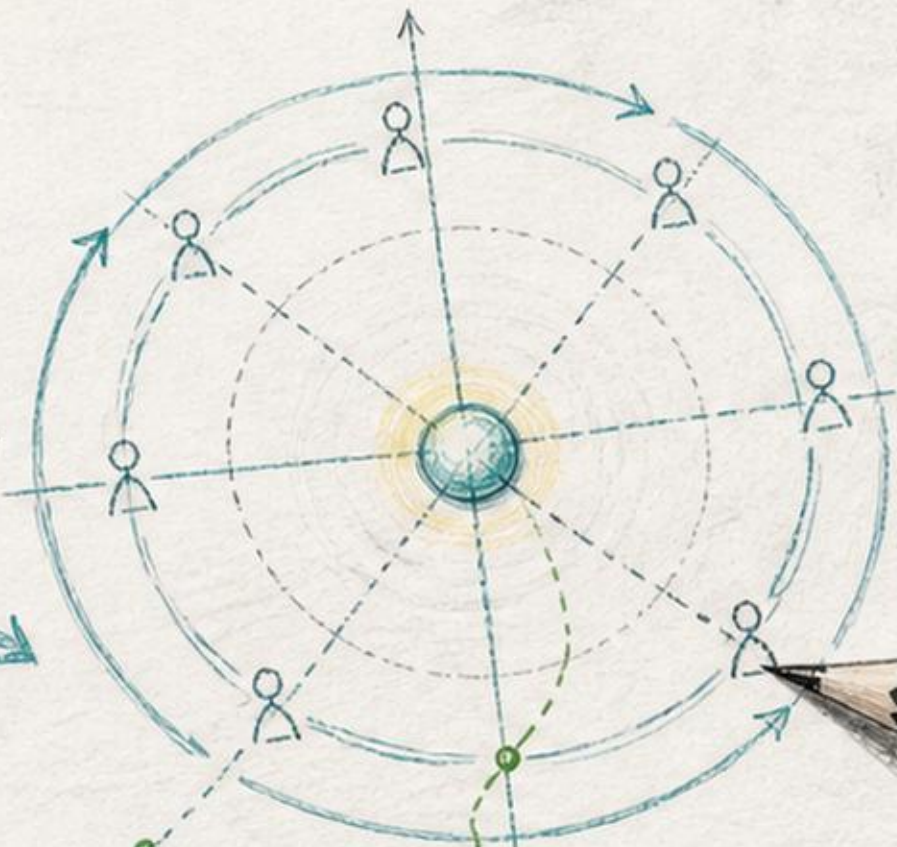
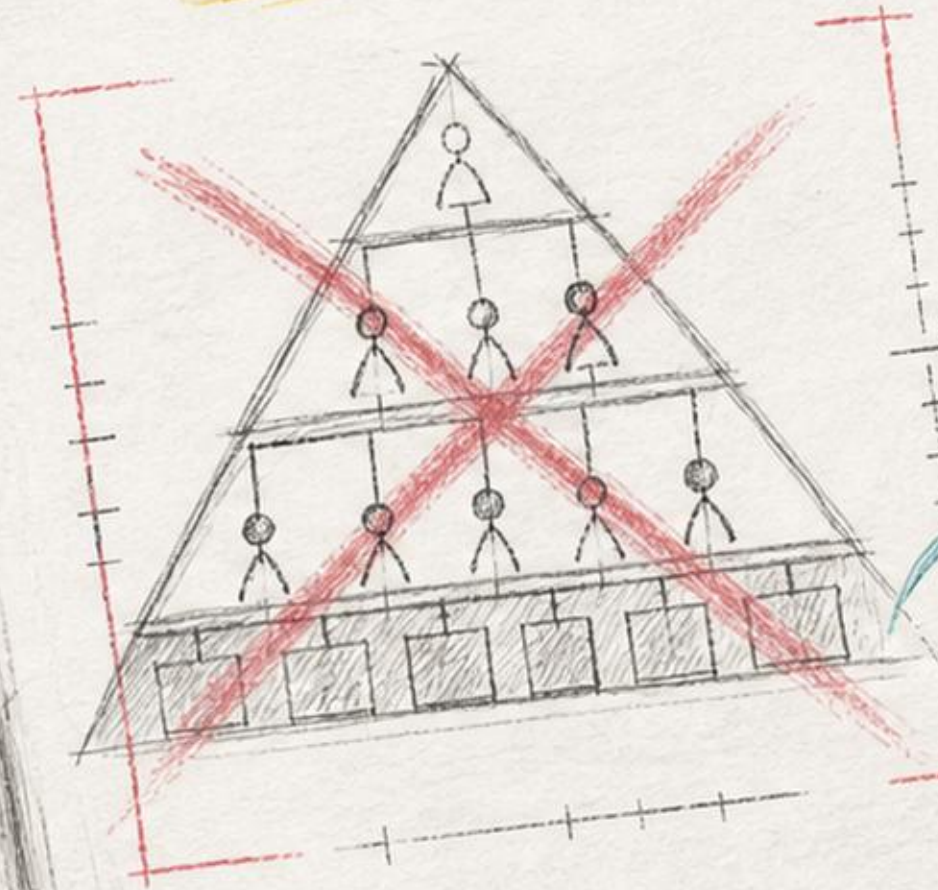
越强大，越迷茫





没有剧本

不当组织设计，当智能体设计





组织，还是智能体？

节点，还是独立单元？