ERP NEWS
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The Rise of Intelligent ERP

The New Face of CRM: From Contacts to Intelligence

EPICOR

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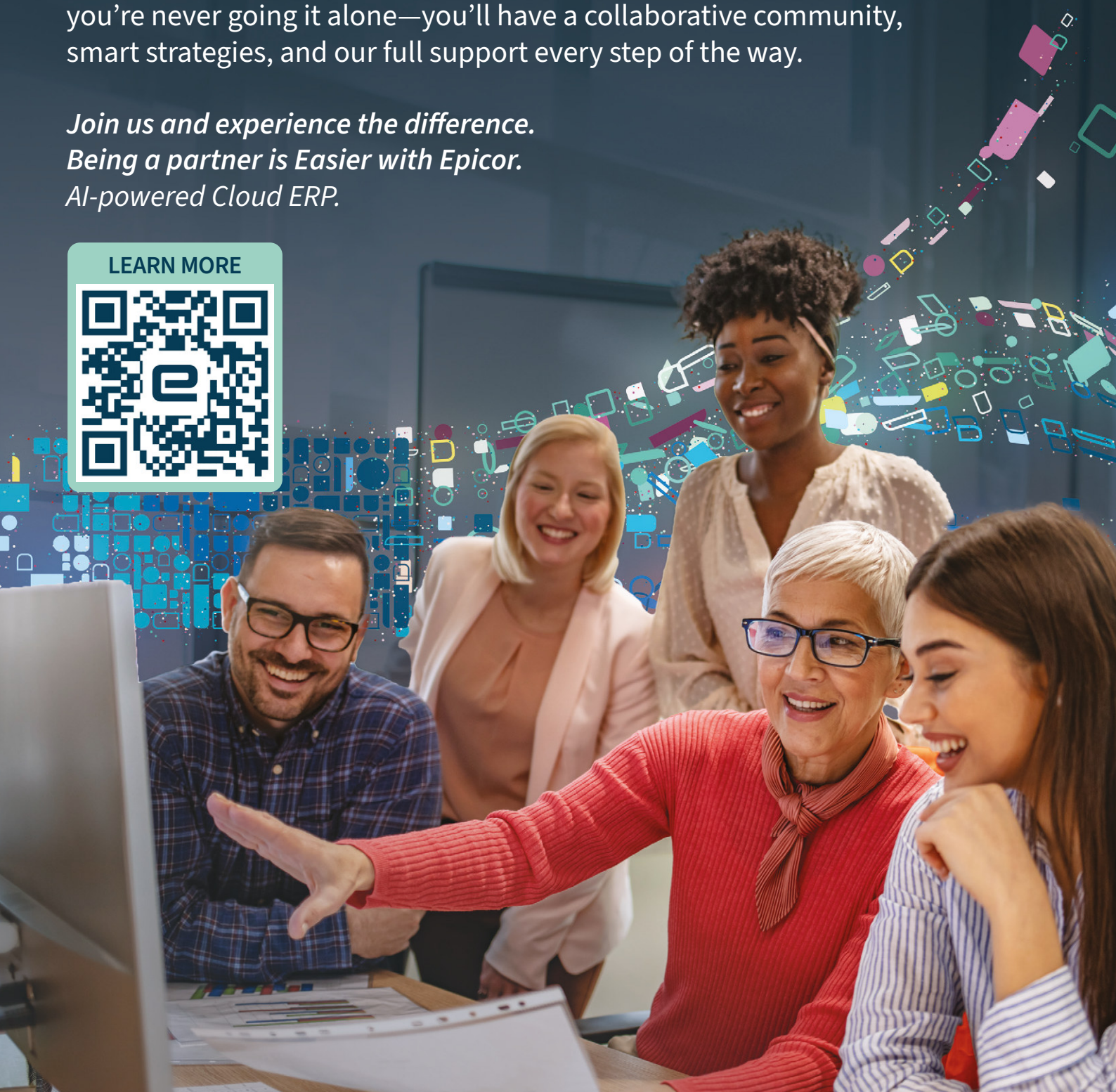

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EDITOR'S NOTE

The first quarter of 2026 highlights a clear turning point for enterprise systems. Artificial intelligence is rapidly transforming ERP from a traditional system of record into a more adaptive platform capable of supporting real-time insight and operational decision-making. This evolution forms the foundation of ERPNews' Q1 editorial theme, The Rise of Intelligent ERP — examining how AI is turning ERP into a system that not only records business activity but increasingly helps guide it.

Within this broader transformation, our March theme — The New Face of CRM: From Contacts to Intelligence — explores how customer intelligence is becoming tightly connected with ERP data, operational visibility, and enterprise-wide decision processes.

Several technology leaders in this issue share how these shifts are playing out across different parts of the enterprise technology landscape.

John Case, CEO of Acumatica, discusses how embedding AI directly into ERP workflows enables mid-market organizations to move beyond experimentation and apply AI in practical ways that improve decision-making across finance, operations, and supply chain processes.

From the transformation delivery perspective, Daniel Chilton, Chief Experience Officer at Embridge Consulting, explains why ERP initiatives must move beyond rigid project models toward adaptive delivery approaches that prioritize leadership capability, organizational trust, and sustainable change.

At the intersection of commerce and operations, Riikka Söderlund, COO of Katana, highlights how the rise of agent-driven commerce is reshaping inventory systems, pushing ERP platforms to deliver real-time, machine-readable product data as AI agents increasingly mediate customer discovery and purchasing decisions.

Srikrishnan Ganesan, CEO of Rocketlane, explores another dimension of this shift through the concept of "agentic execution," where AI agents begin executing structured tasks within delivery workflows, allowing services teams to focus more on outcomes rather than manual coordination.

From a manufacturing perspective, Ohad Idan, Vice President of Product at Rootstock Software, discusses how AI maturity is moving beyond experimentation toward deeper operational integration — embedding predictive intelligence directly into ERP-driven processes such as planning, purchasing, and supply chain coordination.

Finally, Dean Forbes, CEO of Forterro, reflects on how cloud modernization and practical AI adoption are shaping the next phase of ERP innovation for industrial and manufacturing companies navigating increasingly complex operating environments.

Taken together, these conversations reveal a common direction across the enterprise technology landscape: ERP systems are evolving from passive infrastructure into intelligent operational platforms, where AI, data, and customer insight converge to support faster, more informed decisions across the enterprise.

Pinar SENGUL, EDITOR

ERPNEWS

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Why ERP Success Depends on More Than Software: The Strategic Role of Epicor's Partner Ecosystem

Enterprise resource planning systems are often evaluated based on features, functionality, and deployment models. Yet for manufacturers and distributors operating in complex, fast-changing environments, ERP success depends on far more than the technology itself. The difference between an ERP system that enables growth and one that becomes a constraint often comes down to implementation expertise, industry knowledge, and long-term partnership.

This is where Epicor's channel partner ecosystem plays a critical role. Built around the realities of manufacturing and distribution, Epicor's partner model extends the value of its ERP platforms—such as Epicor Kinetic and Prophet 21—by pairing them with specialists who understand how businesses actually operate on the shop floor, in the warehouse, and across the supply chain.

The Shift From ERP Projects to ERP Outcomes

Across the ERP market, expectations have shifted. Organizations no longer view ERP as a one-time system replacement; they expect it to be a foundation for continuous improvement, visibility, and resilience. This shift has elevated the importance of partners who can go beyond configuration and data migration to deliver measurable operational outcomes.

Epicor's partners typically bring deep vertical focus—particularly in manufacturing and distribution—allowing them to align ERP capabilities with industry-specific processes such as engineer-to-order production, mixed-mode scheduling, lot and serial traceability, project manufacturing, and aftermarket service management. This specialization reduces risk during implementation and accelerates time to value.

Rather than forcing businesses to adapt to generic ERP workflows, Epicor partners help tailor solutions to support real-world complexity, whether that involves high-mix job shops, regulated manufacturers, or multi-site distributors.

Expertise Built Through Industry Focus

Many Epicor partners are rooted in hands-on industry experience. They have grown by supporting manufacturers and distributors through operational challenges such as volatile demand, margin pressure, compliance requirements, and supply-chain disruption. That experience shapes how they approach ERP projects—placing equal emphasis on process design, change management, and user adoption.

This industry alignment also enables partners to act as strategic advisors, helping organizations make informed decisions about cloud adoption, system scalability, and technology roadmaps. As businesses navigate modernization initiatives, partners provide guidance on how ERP fits into a broader digital strategy that may include automation, analytics, and connected systems across the enterprise.

Expanding Value Through Technology Enablement

As ERP environments become more interconnected, Epicor partners increasingly deliver value beyond core ERP functionality. Many now provide services spanning cloud infrastructure, managed services, security, data integration, and modern workplace solutions. This holistic approach ensures ERP systems perform reliably while remaining flexible enough to support growth and innovation.

Cloud adoption, in particular, has become a key area of focus. Partners help customers evaluate deployment models, manage transitions from on-premises environments, and optimize performance in cloud-hosted ERP ecosystems. By aligning infrastructure and application strategy, organizations gain improved scalability, uptime, and user experience—without adding internal IT burden.

Preparing Customers for What's Next

Looking ahead, Epicor's partner ecosystem is also playing a role in helping customers prepare for emerging technologies. Artificial intelligence, advanced analytics, and automation are increasingly shaping ERP strategies, especially in manufacturing and distribution environments where efficiency and responsiveness are competitive differentiators.

Partners are investing in these capabilities to help customers unlock insights from operational data, streamline decision-making, and improve responsiveness to market changes. This forward-looking mindset ensures that ERP systems remain relevant as business needs evolve.

A Collaborative Model for Long-Term Success

At its core, Epicor's partner ecosystem reflects a collaborative approach to ERP delivery. Epicor provides industry-focused platforms designed for complex operational environments, while partners deliver the specialization, execution, and ongoing support required to turn technology into business value. For manufacturers and distributors, this model reduces implementation risk, improves adoption, and supports long-term optimization. For partners, it creates opportunities to build differentiated practices around industry expertise and customer success. The result is an ecosystem aligned around outcomes—not just software.

Join the Epicor Channel Partner Program

Epicor's channel partner program represents a strategic commitment to delivering exceptional customer outcomes through specialized expertise. Partners like Conveyance bring unique capabilities that enhance Epicor's solutions while creating significant business opportunities for themselves.

By combining world-class technology with specialized implementation expertise, these partnerships are transforming distribution businesses across North America and beyond.

For the full story and more details about Conveyance's journey with Epicor, *visit.*

Interested in becoming an Epicor Channel Partner? *Visit* to learn more.

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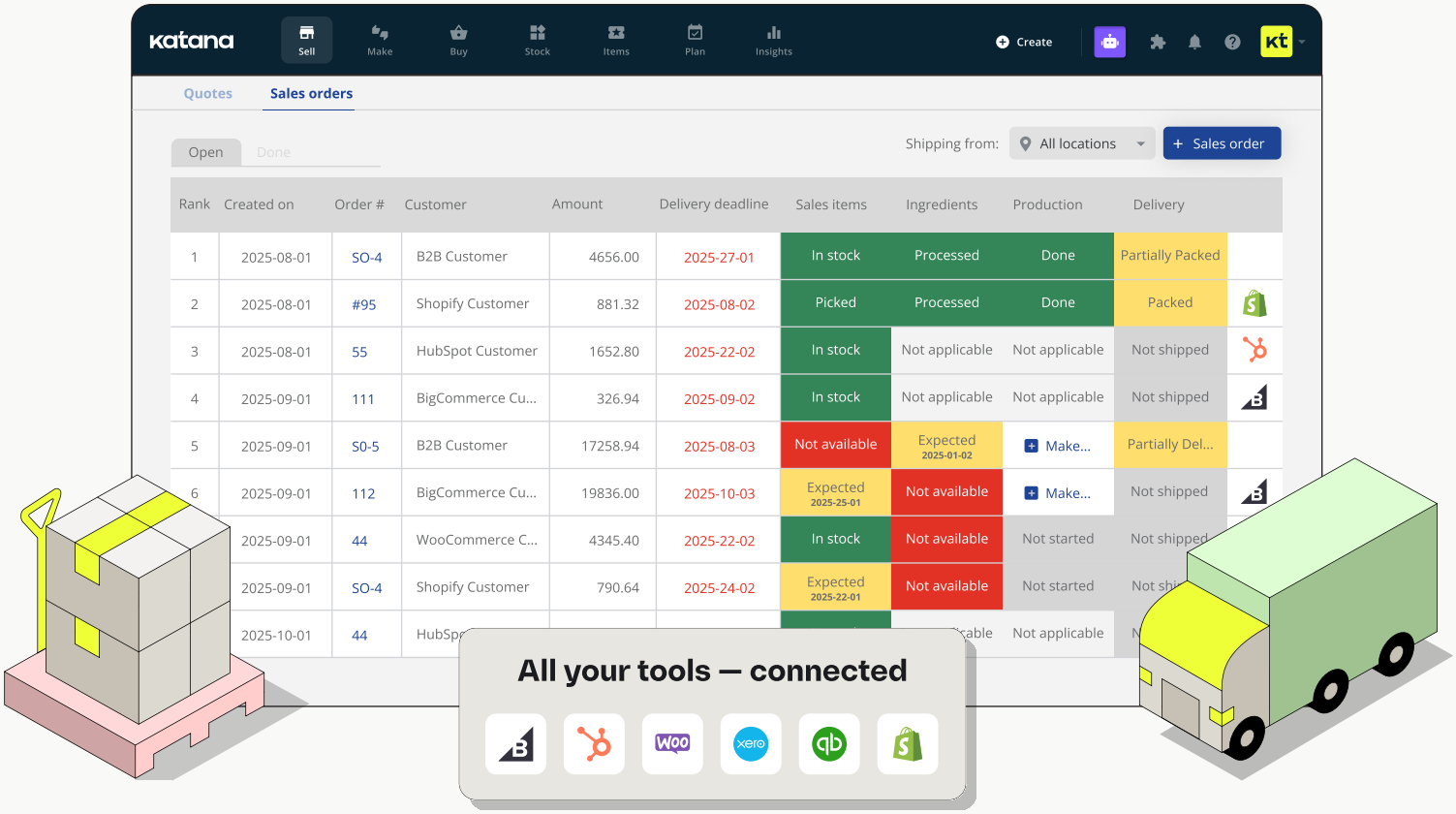
BEST SOFTWARE 2026 Top 50 SUPPLY CHAIN & LOGISTICS PRODUCTS

RANKED #30

★★★★½

6 weeks
to fully implement

1.2x
increase in inventory turnover



Rank	Created on	Order #	Customer	Amount	Delivery deadline	Sales items	Ingredients	Production	Delivery
1	2025-08-01	SO-4	B2B Customer	4656.00	2025-27-01	In stock	Processed	Done	Partially Packed
2	2025-08-01	#95	Shopify Customer	881.32	2025-08-02	Picked	Processed	Done	Packed
3	2025-08-01	55	HubSpot Customer	1652.80	2025-22-02	In stock	Not applicable	Not applicable	Not shipped
4	2025-09-01	111	BigCommerce Cu...	326.94	2025-09-02	In stock	Not applicable	Not applicable	Not shipped
5	2025-09-01	S0-5	B2B Customer	17258.94	2025-08-03	Not available	Expected 2025-01-02	Make...	Partially Del...
6	2025-09-01	112	BigCommerce Cu...	19836.00	2025-10-03	Expected 2025-25-01	Not available	Make...	Not shipped
	2025-09-01	44	WooCommerce C...	4345.40	2025-22-02	In stock	Not available	Not started	Not shipped
	2025-09-01	SO-4	Shopify Customer	790.64	2025-24-02	Expected 2025-22-01	Not available	Not started	Not shi
	2025-10-01	44	HubSp					Not applicable	

- Multi-channel, multi-location inventory control
- Planning, forecasting and automated reorder points
- Fast to implement, simple to learn, easy to use

Preparing ERP for Agentic Commerce: Katana COO Riikka Söderlund on Real-Time Inventory and AI-Driven Demand

As artificial intelligence begins to reshape digital commerce, the role of ERP and inventory systems is undergoing a fundamental shift. The rise of agentic commerce—where AI-driven agents assist or even automate purchasing decisions—means that enterprise systems must provide accurate, real-time operational data not only for internal teams but also for machine-driven marketplaces and digital platforms.

For many organizations, this shift places new pressure on inventory infrastructure. Systems originally designed for periodic updates and human workflows must now support real-time visibility, machine-readable product data, and reliable fulfillment signals across multiple channels. In this environment, inventory accuracy is no longer just a back-office operational concern—it has become a frontline driver of customer experience, brand trust, and revenue performance.

In this written Q&A with ERPNews, Riikka Söderlund shares her perspective on how agentic commerce is reshaping ERP and inventory management strategies. She discusses the growing importance of real-time data visibility, the architectural role of cloud infrastructure and composable systems, and why ERP leaders must rethink inventory systems as part of a broader digital commerce infrastructure. The conversation also explores how organizations can modernize inventory intelligence without replacing their entire ERP stack, and what capabilities will define successful ERP platforms in the next phase of AI-driven commerce.

Interview with
Riikka Söderlund,
COO of Katana

1. Agentic commerce is gaining momentum as digital demand and physical fulfillment converge. From Katana's perspective, what fundamentally changes for ERP and inventory systems in this new model?

Inventory management is no longer just an internal tracking tool or function; this new model is shifting toward leveraging inventory data as external decision infrastructure. AI agents are increasingly taking over the consumer journey, replacing default website browsing and customer experiences by taking the user from discovery to checkout in the same platform. Systems must provide real-time, machine-visible product data to remain discoverable within these agentic shopping experiences. This shift is stress-testing inventory systems. ERPs need to evolve their approach and guarantee accurate product availability and fulfillment data to keep up with agentic queries and transactions.

2. Many organizations still treat inventory accuracy as a back-office concern. Why is it becoming a front-line performance metric for revenue, customer experience, and brand trust?

Inventory accuracy now determines brand visibility. Inventory accuracy is now directly affecting revenue, discoverability and brand trustworthiness. From a revenue standpoint, inventory opacity ties up working capital in excess safety stock, creates stockouts that turn away legitimate orders and damage marketplace rankings. For most small and mid-sized brands, this means someone is spending up to 20 hours per week on operational firefighting instead of growth. On the customer experience side, inaccurate available-to-promise data leads to overselling, post-purchase cancellations and broken promotions, eroding loyalty and forcing margin-eating make-goods. Most critically, in the era of AI shopping agents, if transactions fail, agents route buyers elsewhere. Companies are realizing they are already paying for poor visibility in lost sales and trust, and that investing in a real-time system of record is now essential to stay competitive.

3. AI tools are only as effective as the data they rely on. What core data layers must be in place for agentic and AI-driven inventory decisions to actually work?

Organizations need a few core foundations: real-time visibility across all locations, consistent product and order IDs across systems, and clear records of every inventory movement. Having a data stack anchored in a true system of record is crucial to maintaining machine-speed as AI drives consumer behavior and queries inventory. On top of that foundation, businesses also need event-driven, real-time aggregation so every system updates instantly rather than in batches. Complete audit trails and state history are also essential to ensure trust, traceability and reliable decision-making at machine speed. AI systems can trust the data they access, which is essential because agents won't compensate for uncertainty the way humans might.

4. How can manufacturers and SMBs modernize inventory visibility without replacing their entire ERP stack or disrupting daily operations?

The most practical approach is to implement a dedicated inventory truth layer that focuses on real-time data and composability rather than all-in-one control. Instead of replacing an entire ERP, brands can adopt a system designed to act as a foundation for real-time visibility, providing a single source of record by aggregating data from various channels and locations without transforming it into stale numbers. Modernization also means shifting away from legacy batch processes to event-driven architecture, ensuring available-to-promise counts are accurate across every sales channel simultaneously. By leveraging emerging commerce protocols like UCP and ACP, prioritizing API-first microservices and adopting a composable approach, businesses can connect their entire ecosystem without degrading system performance and swap out specific parts of their tech stack as they grow. The most effective way to avoid disruption is to implement these systems before they lead to load-bearing chaos.

5. In your experience, where do companies most often struggle when trying to operationalize real-time inventory data across sales, operations, and finance?

Most companies struggle to operationalize real-time inventory because they're still relying on manual processes, fragmented data or legacy systems that were never built for the speed of modern commerce. Even fast-growing brands

often run on spreadsheets updated once a day, creating what amounts to "inventory opacity." Teams spend more time reconciling discrepancies than driving growth and often carry excess safety stock because they don't trust their own numbers. Technically, many systems still rely on batch updates instead of event-driven architecture, cap integrations making it nearly impossible to maintain a true single source of truth. As a result, companies struggle to calculate accurate available-to-promise inventory across channels, leading to overselling, missed revenue or stalled sales conversations. Now, with AI shopping agents querying inventory in real time, the bar is even higher. Brands need accurate inventory infrastructure or risk being deprioritized altogether.

"Inventory accuracy now determines brand visibility, revenue potential, and customer trust in the age of AI-driven shopping."

6. Tariffs, labor shortages, and supply volatility continue to pressure margins. How does improved inventory intelligence help organizations remain resilient in this environment?

Improved inventory intelligence provides a foundation for operational resilience by transforming inventory from a financial blind spot into a real-time asset. This allows organizations to reduce safety stock, avoid costly rush shipments and fulfill orders confidently during uncertainty. Real-time visibility also helps organizations remain resilient against supply volatility by providing a high-trust available-to-promise calculation. When a company lacks trust in their data, they build up safety stock buffers, which ties up working capital that could be put toward other things. Companies with real-time visibility know exactly what they have in stock and can meet consumer demand accordingly, reducing the need for conservative buffers and positioning themselves competitively on the market.

7. How should ERP leaders think about the balance between automation and human control as agentic workflows begin to execute decisions autonomously?

Automated workflows are best suited for handling data with speed and scale, while humans should remain in charge of policy, rules, exception handling and strategy. More agent customers means ERP leaders need to be equipped with agent workforce to match the speed of AI shopping. Traditional ERP systems were built on the assumption that humans are forgiving and can tolerate 15–30-minute sync delays. However, AI agents operate in milliseconds. The goal isn't perfection. Strategically automating just 90% of the operational burden, leaving only the exceptional cases manual, can make an impact and allow teams to focus on areas of growth instead of constant inventory monitoring. A winning balance keeps autonomy governed and maintained.

"ERP priorities will shift from feature lists to architectural readiness as companies prepare for real-time, AI-driven commerce."

8. What role does cloud architecture play in enabling real-time visibility and scalable agentic workflows compared to legacy on-premise systems?

While legacy systems were built for human-centric timelines, modern cloud infrastructure is designed for the high-

frequency, high-trust demands of agentic commerce. It gives ERPs real-time data and the API-first connectivity needed for many agentic and commerce protocols, which on-premise systems might struggle to support. Many older systems are monolithic, meaning their performance degrades as more connections are added. Embracing an approach designed on microservices means systems can handle unlimited integrations without performance loss. Cloud infrastructure provides the foundation necessary to remain discoverable and reliable in an environment where machines, not just humans, are making purchasing decisions.

9. Looking ahead to the next 2–3 years, how do you see ERP priorities shifting as agentic commerce moves from experimentation to execution?

I'm watching brands to see who is building for agent-driven commerce today and who's retrofitting human-driven systems with AI tools. I think we'll see a massive consolidation as architectural debt becomes unavoidable. Systems that rely on those monolithic systems will hit integration caps and struggle to achieve the data connectivity needed for modern inventory management. ERP priorities will likely shift from feature lists to architectural readiness. Leaders will begin embedding AI and automation governance into workflows so systems can support real-time data access, unlimited integrations and composable infrastructure. In the agentic commerce era, I also see reliability becoming the new SEO. ERPs will be judge on their ability to maintain a brand's visibility within AI platforms.

10. For organizations just starting this journey, what is the first practical step they should take to prepare their ERP and inventory infrastructure for agentic commerce?

The most practical first step for businesses is to identify one operational source for inventory that is cloud-based and API-accessible. Audit a sample of SKUs across locations and compare to see if system orders and stock movements line up. Track the hours spent on manual reconciliation and lost sales caused by conservative stock buffers. In many cases, you will find you are already spending more on inefficiency than you would on a system designed to fix it. If accuracy is inconsistent or the answer isn't immediate, that's the signal for organizations to prioritize real-time visibility. That single, reliable inventory layer is the foundation that everything in agentic commerce relies on.

Industrial ERP at a Turning Point: Dean Forbes on Cloud Adoption and Pragmatic AI

Industrial software providers are entering a new phase of transformation as cloud modernisation, recurring revenue models, and pragmatic AI adoption reshape the enterprise technology landscape for manufacturers. For mid-market industrial businesses in particular, the focus is shifting toward operational resilience, predictable upgrades, and systems capable of supporting more data-driven decision-making across the organisation.

Forterro has been actively positioning itself at the centre of this shift. The company closed 2025 with strong momentum, driven by accelerating cloud adoption across its portfolio and an increasing share of recurring revenue. At the same time, Forterro continues to expand its capabilities through targeted acquisitions while integrating practical AI functionality into solutions designed specifically for industrial environments.

In this Q&A with ERPNews, Dean Forbes discusses the strategic drivers behind Forterro's growth, how cloud transformation is reshaping customer relationships, and why industrial manufacturers are prioritising stronger data foundations and automation. He also shares his perspective on the role of pragmatic AI in manufacturing operations and the technology priorities that will shape the industrial ERP landscape over the next several years.

1. Forterro closed 2025 with strong momentum, driven by cloud adoption and AI led investment. What do you see as the biggest strategic shift behind this growth?

"The biggest shift has been a meaningful move to the cloud. We made a clear decision to modernise our products, simplify our architecture and give customers a reliable, future ready path forward. This created a level of confidence that unlocked adoption and repeat business. Once customers saw the stability, predictability and operational advantage that cloud provides, the momentum accelerated. The organisation rallied behind this focus and that alignment has been a major driver of our performance."

Interview with
Dean Forbes,
CEO, Forterro

FORTERRO

2. Many industrial manufacturers are still cautious about IT spend. Why do you think Forterro customers are accelerating cloud adoption despite broader market hesitation?

"Our customers are accelerating because they know their businesses depend on systems that are resilient and ready for the future. They trust us to power their day to day operations and that trust grows when they see that cloud gives them more stability, more visibility and a smoother upgrade path.

"A big reason for this confidence is the work our teams do behind the scenes. We take on the heavy lifting of cloud migration so customers feel minimum disruption or downtime. That practical support removes the fear that often slows investment decisions. Once customers see that modernising with Forterro strengthens their ability to run, respond and grow, the hesitation disappears."

3. Forterro now generates 74 % of its revenue from recurring sources. How does this change the way you engage with customers and deliver long term value?

"A recurring model keeps us focused on delivering value every month. It pushes us to listen more closely, support adoption and stay accountable for real outcomes rather than one off projects. It builds stronger partnerships because our success is tied directly to customer success.
"Recurring revenue also gives us the stability and assurance to invest in further development and innovation so we can continue to power our customers' businesses in the long term and through changing expectations and market dynamics. It is a compliment to the organisation because it shows customers are choosing an ongoing relationship with us. That level of commitment tells us we are creating value they trust and want to build on."

4. AI is becoming central to Forterro's strategy. Where are customers seeing the most immediate and practical impact from AI today?

"There is a lot of noise and hype around AI, and what we're hearing from our industrial customers is that they don't have time to develop their own ai strategy or solution. They are focused on powering Europe in their sectors and keeping their operations running day in, day out. Our job at Forterro is to cut through that noise and offer AI where it genuinely matters.

"Customers are seeing real impact where AI reduces friction, speeds up decisions and helps teams stay ahead of issues before they become problems. The value comes from practical improvements in planning, automation and accuracy. This is AI that supports the people doing the hard work in manufacturing, not AI for the sake of headlines."

5. How does Forterro balance innovation with the very specific operational needs of industrial mid-market customers?

"The power and value Forterro brings comes from central innovation and focus that all of our customers benefit from. Centrally, Forterro provides security, data consistency and modern capability. Our products maintain the specialist workflows that sit at the heart of industrial operations. This approach means customers never have to choose between innovation and consistency. They get the confidence of modern technology and the precision of industry-ready solutions in one place."

> "The priorities will centre on resilience and competitiveness. Industrial businesses will need stronger data foundations so they can automate more work, predict issues earlier and make faster, more confident decisions."

6. Acquisitions have played a key role in Forterro's evolution. How do you ensure new capabilities around AI, analytics and vertical expertise are integrated without disrupting customers?

"We build the Forterro group by investing in industry leading businesses across Europe, and we are a well oiled machine in that department. Forterro has a specialist team who sources, validates and integrates these brilliant companies. The people in these teams often come from customer and product roles within the group, which means the depth of experience

behind our investment decisions is perfectly aligned to the forward strategy. Throughout the entire investment lifecycle, our experts who work directly with customers validate that the business is the right fit for the group.

"Our approach is simple. We acquire to enhance our customers' access to innovation, capability and expertise. We do not acquire to create disruption. Our teams are never distracted by acquisitions. We are powered by them, and we deliver the benefits straight back to our loyal customers."

7. Net revenue retention of 114 % suggests strong expansion within the installed base. What does this tell you about customer confidence and usage patterns?

"It tells us that customers are leaning further in. They are adding modules, adopting cloud services and using the system in more functions across their businesses. It is a clear signal of trust. Customers only expand with partners who help them perform better and who show up consistently. This level of NRR shows that we are becoming more important to their operations year after year."

8. Looking ahead, what do you expect to be the biggest technology priorities for industrial businesses over the next two to three years?

"The priorities will centre on resilience and competitiveness. Making that possible is quality, actionable and secured data. Industrial businesses will need stronger data foundations so they can automate more work, predict issues earlier and make faster, more confident decisions. They know that better data flows through every part of the operation, from planning and inventory to customer service and finance.

"Agentic capability will also rise quickly. Our customers want technology that can act on insights, take on routine tasks and support teams without creating extra risk or complexity. Combined with cloud modernisation, these shifts will help companies build more adaptable and efficient operations.

"To achieve all of this, businesses will need a trusted partner. Someone who understands industrial environments, brings clarity to the noise and can guide them through modernisation without disruption. The companies that choose the right partner early will move faster and compete harder as the market continues to evolve."

9. For manufacturers considering their next ERP or cloud move, what advice would you offer to ensure they future proof their operations?

"Start with outcomes. Be clear about the performance improvements you expect and make decisions that align to those goals. Choose a platform with strong data foundations, flexibility, AI capability and a proven upgrade path. Surround yourself with partners who understand industrial operations and will stay with you through the journey. Future proofing comes from building a system that can adapt as your business evolves."

About Dean Forbes

Dean Forbes joined Forterro as CEO in March 2021. He leads overall operations and go-to-market activities, and serves as head of the Forterro Executive Board.

Dean has enjoyed an extensive and successful career in executive and senior leadership roles for a number of international software companies. Prior to Forterro, he led the growth and expansion of CoreHR in Europe – with the organisation later acquired by The Access Group.

Earlier, he had been CEO of Paris-headquartered SaaS company KDS, where he steered growth and international expansion.

In 2020, Dean founded the Forbes Family Group (FFG), where he serves as Chairman – actively coaching and mentoring leaders within the firm's investment portfolio. He is an unwavering champion of social mobility initiatives, both as part of uncovering new investment opportunities for FFG, and through initiatives sponsored within the local communities.

About Forterro

Since it was founded in 2012, Forterro has grown to employ more than 1,600 employees who work from over 40 office locations around the world to support specialised software solutions and more than 13,000 small and midsize manufacturers. Headquartered in London, Forterro is a category leader in one of the largest and most steadily growing markets in software, with strongholds in each of Europe's top production economies, as well as regional service hubs and development centres around the world. Forterro is home to a diverse range of local and vertical industry software solutions - each one uniquely developed by the midmarket, for the midmarket. For more information, visit www.forterro.com.

Rethinking ERP Transformation: Daniel Chilton on Adaptive Change and the Human Side of Enterprise Programmes

Large-scale ERP initiatives are often structured as tightly defined projects with fixed timelines, milestones, and delivery frameworks. Yet in practice, enterprise environments rarely remain static. Business priorities shift, leadership teams evolve, regulatory pressures emerge, and organisations are forced to adapt mid-programme. The challenge for many transformation leaders is not the technology itself, but the ability to sustain momentum while the organisation around the programme continues to change.

Embridge Consulting has been working closely with organisations navigating these realities across complex ERP and digital transformation initiatives. Drawing on these experiences, the firm has formalised an approach it calls Elastic Change, a delivery model designed to balance programme discipline with adaptability while recognising the human impact of continuous transformation.

In this conversation with ERPNews, Daniel Chilton discusses why traditional change management models often struggle in modern ERP environments, how leadership behaviours and emotional intelligence influence programme outcomes, and why organisations must begin treating ERP not as a one-off project but as an evolving operational capability.

Interview with
Daniel Chilton,
Chief Experience Officer,
Embridge Consulting

1. What specific challenges led you to formalise Elastic Change?

We kept seeing the same pattern: ERP programmes were designed, with good intention, as fixed projects, but reality wasn't fixed. Priorities shifted as the business progressed through its fiscal year, funding or capacity decisions moved, a regulatory update landed mid-design, or a new senior leader joined and asked for something different.

The plan stayed rigid while the organisation evolved, and it's the teams who carried the strain. We have a saying that systems and processes don't burn out, people do. Elastic Change formalises what consistently worked in practice: a set of delivery services that can flex, strong technology foundations that can scale, and leadership that recognises the human impact of continuous change.

2. What structural or leadership blind spots sit behind these failures?

The biggest blind spots are treating transformation as a go-live event and underestimating the human and operational load. We see governance that tracks tasks but not change fatigue, human resistance and adoption risk. Your programme RAG status might be green, but your workshop energy is dropping. From a leadership perspective, sponsors often underestimate the load their people carry or push pace without building enough confidence within their organisations first. Technical delivery can be strong, but if trust, clarity and energy drops, momentum goes with it.

3. How does Elastic Change differ from traditional change management in practical terms?

Traditional change management is still treated as a supporting stream rather than a core element. Elastic Change integrates adaptability and human sustainability into the delivery programme through a dedicated set of services, and directly in how we lead every workshop, design session and decision forum. It's not "comms and training at the end." In addition to that, it's a services model that can flex within clear outcomes and guardrails, pacing change based on capacity, and using EQ-led leadership behaviours throughout design, build, testing, adoption and optimisation. It's a continuous model, not a one-off method.

> "Systems and processes don't burn out — people do."

4. How does EQ tangibly influence success in large-scale programmes?

EQ affects the moments that decide whether people commit or comply. Leaders with EQ name pressure early, listen before enforcing decisions, communicate trade-offs clearly, and adjust pace when fatigue shows up. That builds trust, reduces resistance and protects discretionary effort. When leaders don't regulate themselves, stress spreads and programmes stall. In practical terms, EQ improves decision speed, lowers friction in workshops and testing, strengthens sponsor effectiveness, and drives sustained adoption after go-live. So for example, when someone asks "why are we changing our system, the current one works just fine" high EQ leaders stay calm and curious, understand the resistance and help their team move forward. Or when tension rises in UAT, strong EQ diffuses it instead of allowing emotions to escalate.

5. How do you address stakeholder fatigue and change saturation?

First, we treat fatigue as a delivery risk, not a people problem. We actively assess capacity, simplify and sequence change, and reduce unnecessary "micro-actions" that create friction. Such as not stacking multiple releases on the same teams in the same quarter. Identifying signals early reduces the degree of intervention needed, this is why creating safe escalation routes and building trust is essential. We focus on confidence-building moments: credible training, visible leadership alignment, quick wins, and honest communication about what's changing and why. We also protect the people carrying the programme by setting realistic pacing, clear decision rights, and stronger support around the roles most impacted.

6. How does Elastic Change support scalability when priorities shift mid-project?

Elastic Change plans for change rather than hoping it won't happen. We set clear outcomes and governance, but design delivery to flex within those guardrails. That means modular workstreams, scalable resourcing, and a model that allows organisations to expand or redirect services. When priorities shift, we don't throw away six months of work and begin again. We adjust within guardrails and keep momentum.

7. How do you measure whether change has truly "stuck" beyond go-live?

Adoption must be visible and actively supported, so data around login and feature usage are important. But we look to measure reductions in workarounds, shadow spreadsheets and manual fixes. We also monitor data quality and processing times across core workflows.

But metrics alone aren't enough. We build change champion networks, create structured feedback loops to adjust how people are responding, and use adoption dashboards to maintain visibility. Continuous improvement support ensures the solution evolves with staff needs, not just technical requirements.
When people are engaging, giving feedback, advocating for the new way of working and operating confidently without heavy programme intervention, that's when change has truly stuck.

8. What role do data visibility and governance play in an adaptive model?

They're foundational. Without trusted data and clear governance, organisations can't adapt because they can't see what's happening. Good data visibility reduces debate, increases decision speed and improves accountability. That's not just operationally helpful, it builds confidence and protects energy across teams. In an adaptive model, data allows you to steer continuously, not just report progress.

But adaptability doesn't mean a lack of control. Elastic Change is not a rejection of programme discipline or delivery rigour. It isn't uncontrolled scope creep, and it doesn't abandon plans, milestones or accountability. Instead, scope, outcomes and guardrails are clearly set. That means clear decision rights, escalation routes and defined non-negotiables. Delivery is then designed to flex within those controls as insight grows and priorities shift.
That balance is critical. Governance provides the structure leaders need for confidence, while adaptability ensures change can evolve without breaking people, programmes or momentum.

9. How must frameworks evolve over the next 3–5 years?

Transformation needs to move from "programme delivery" to "continuous capability." AI will accelerate change cycles, but it also raises the cost of low levels of human interaction and weak data foundations. Frameworks will need to be more modular, outcome-led and resilient, with stronger integration and governance. Most importantly, leadership capability, particularly emotional intelligence, will become a differentiator of success. The winners will be organisations that can evolve fast without burning out their people, because AI will amplify both good and bad operating models.

10. For leaders planning ERP initiatives in 2026, what one mindset shift would you recommend?

Stop thinking of ERP as a project you complete and start treating it as part of an operating model you evolve. Optimisation, adoption and continuous improvement are where value is won or lost. Design for adaptability and scale from day one, and lead with emotional intelligence so people can sustain the change. The goal isn't just go-live. It's long-term momentum, scale and sustainable performance.

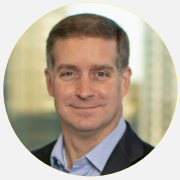
Embridge CONSULTING

Inside Acumatica Summit 2026: CEO John Case on Practical AI, Industry ERP, and the Next Phase of Cloud Innovation

The ERP landscape is entering a new phase as artificial intelligence moves from experimentation to operational reality. For many mid-market organizations, the question is no longer whether AI will influence enterprise systems, but how it will be embedded into everyday workflows in ways that improve decision-making without adding complexity.

At Acumatica Summit 2026, the company placed strong emphasis on practical AI innovation, deeper industry capabilities, and the continued evolution of ERP platforms into intelligent operating systems for growing businesses. Rather than positioning AI as a standalone technology layer, Acumatica highlighted its strategy of embedding AI directly within core ERP processes—from anomaly detection in finance to AI-assisted reporting and operational insights.

In this written Q&A with ERPNews, John Case discusses how the company approaches AI-enabled ERP, why integrated payments and financial workflows are becoming central to modern ERP platforms, and how industry-specific capabilities are shaping the future of enterprise systems for mid-sized organizations. He also shares his perspective on the next wave of ERP innovation and the capabilities likely to redefine the market over the next several years.



Interview with
John Case,
CEO of *Acumatica*

Acumatica
The Cloud ERP

Interview with John Case

1. At Acumatica Summit 2026, you emphasized helping customers move beyond AI experimentation. What fundamentally distinguishes Acumatica's AI approach from bolt-on or experimental AI strategies in the ERP market?

a. We were intentional at our Summit event to showcase those AI-enabled innovations that have a practical impact in the real world. Too much of the AI functionality in the ERP market today feels like a bolt-on experiment, not something customers can use in their day-to-day workflows. We take a different approach to AI by building new functionality into the solution in a practical way, grounded in clean, comprehensive business data and informed by how our customers work. We do this by listening closely to customers, understanding their daily operations, and applying AI where it can make the biggest impact to help mid-sized businesses run better, more confidently, and with full control over their data and decisions.

2. How does embedding AI directly into everyday ERP workflows change decision-making for mid-market organizations compared to standalone analytics or external AI tools?

a. The biggest difference is context. When AI sits outside of the ERP solution, the insights generated tend to become disconnected from the actual work people are doing. When it's built directly into the workflow, it becomes part of the daily experience, helping teams make faster, more informed decisions without switching tools or disrupting processes that already work. That's especially important in the mid-market space, where teams don't have time for complicated systems. AI should feel like a productivity boost, not another application or platform to manage.

3. What are the most tangible business outcomes Acumatica customers are seeing today from AI-powered capabilities, particularly across finance, operations, and supply chain management?

a. What we hear from customers is pretty consistent: better efficiency, visibility, and decision-making. In finance, capabilities like AI-powered anomaly detection help teams flag unusual transactions or discrepancies earlier in the close process, reducing manual review and last-minute surprises. Across operations and supply chain, AI-assisted search and reporting make it easier for teams to find answers quickly, spot trends, and forecast more accurately without digging through endless reports. The common theme is that AI helps customers spend less time chasing problems and more time staying ahead of them.

4. With the CoreChain acquisition and the AvidXchange partnership, how is Acumatica redefining end-to-end AR/AP (Accounts Receivable / Accounts Payable) processes, and what problems does this solve for growing businesses?

a. For growing businesses, AR and AP are often more manual and fragmented than they should be. Too often, they bounce between ERP systems, banking portals, spreadsheets, and third-party tools, resulting in delays, errors, and limited visibility into cash flow. Acquiring CoreChain is a strategic step toward

advancing Acumatica's vision for a more unified, customer-centric cloud ERP, bringing proven payments capabilities and deep operational expertise to help us embed modern AR and AP workflows directly into the platform. Combined with partners like AvidXchange and BILL, we're building a strong ecosystem that gives customers options. The end goal is fewer disconnected workflows, faster payment cycles, easier reconciliation, and a clearer picture of where cash is going.

5. Do you see ERP evolving into a central financial operating system rather than just a system of record, and how does Acumatica's payments strategy support that broader vision?

a. Yes, and it's already happening. ERP used to be a system of record or a place where transactions were stored. Today, companies need ERP solutions to be systems of intelligence that reflect how the business is operating in real time. That's why our payments strategy is so important. When AR and AP are deeply integrated, ERP technology becomes the business's financial operating system, supporting smarter decisions, faster action, and better forecasting.

6. Many Acumatica customers are fast-growing, multi-entity organizations. How does the platform enable scale while avoiding the operational complexity and technical debt often associated with growth?

a. Growth, while exciting, can often lead to complexities as many companies start to feel the limits of their systems. As they add new entities, business lines, and locations, legacy ERP systems and spreadsheets quickly become bottlenecks. We see this a lot with multi-entity organizations like *Data Security, Inc. (previously Telesis)*, which was running several manufacturing businesses, restaurants, and other operations on outdated tools that couldn't scale. Acumatica's architecture and configurability are designed to handle multi-entity complexity without forcing companies to resort to heavy customization. For Data Security, Inc., that meant connecting operations across six businesses into a single platform, gaining real-time visibility, and automating workflows that previously required more finance staff. They were able to grow faster—doubling production, reducing inventory, and accelerating financial close—without accumulating the technical debt that often slows growing organizations down.

> "Too much of the AI functionality in the ERP market today feels like a bolt-on experiment, not something customers can use in their day-to-day workflows."

7. Day 2 of Summit 2026 highlighted that new capabilities are shaped in close collaboration with customers. How does customer feedback practically influence your product roadmap, especially for AI-first innovations?

a. Our product roadmap, feature updates, and capability enhancements rely on what we call customer-driven innovation. We spend a lot of time visiting customers to get a deeper understanding of what they're trying to accomplish and where they run into friction in their day-to-day work. That's especially true with AI, because customers want practical tools they can rely on and use. We introduced innovations like Acumatica AI Studio and Acumatica AI Assistant to enable customers and partners to configure and apply AI in ways that make sense for their specific businesses.

8. With enhancements such as AI-powered anomaly detection, improved reporting, and Acumatica Assistant, how is ERP evolving from a system of insight to a system of assistance and action?

a. The shift is that ERP solutions are becoming more proactive with AI capabilities. Historically, the system told you what happened. Then it started telling you what's happening. Now, it's beginning to help you understand what to do next. Features like AI-powered anomaly detection are part of that evolution, helping teams spot issues early and take action faster.

9. Acumatica continues to invest in industry-specific capabilities across manufacturing, distribution, retail, construction, and professional services. Why is industry depth increasingly critical to ERP success compared to more generic platforms?

a. Every industry has its own rules, regulations, and reality. A generic ERP may be able to handle basic accounting, but it often breaks down in the workflows that actually drive performance, whether that's pricing, cost control, or execution under pressure.

As Acumatica customer *Eagle Fence Distributing* put it, "When global supply chain problems caused prices on every widget that we sell to flux, we had to be nimble and quickly get replacement costs into the system overnight. Acumatica was able to handle that. There would have been no way to have the control and flexibility we have today with customer pricing and an accurate view of our costs without Acumatica."

That's why industry depth matters. It shortens time-to-value and gives businesses systems built for how they actually operate, rather than something they have to customize endlessly.

10. Looking beyond 2026, which shifts or capabilities do you believe will most fundamentally redefine ERP over the next three to five years, and where is Acumatica placing its biggest strategic bets?

a. I see three things that will reshape ERP in a significant way. First, AI will be everywhere, but it must be embedded and practical, not gimmicky. Second, reporting and insight will continue to evolve toward real-time intelligence. And third, industry-specific depth will matter more than ever, because customers want solutions that work for their business model. Those are the areas where Acumatica is placing our biggest bets -- building a platform that delivers immediate value and becomes more intelligent, actionable, and tailored over time.

"ERP used to be a system of record. Today it needs to be a system of intelligence that reflects how the business is operating in real time."

About John Case

As Chief Executive Officer, John manages Acumatica's operations and leads a Community of employees, developers, partners, and customers in fulfilling the company's Rallying Cry: Building the future of business, together. John was selected as CEO by the Acumatica Board of Directors and joined the company in February 2022. During his tenure and under his leadership, Acumatica has experienced accelerated growth with an expanding customer base, a growing partner ecosystem, and the continued evolution of its cloud ERP solution with capabilities and features specifically designed to address the real-world needs of today's small and midsized businesses.

Prior to taking the helm at Acumatica, John served as president and CEO of Unify Square, a leading provider of operations and performance management software and cloud-managed services. He also spent 16 years at Microsoft in various executive-level positions, including Corporate Vice President of Office and Office 365, where he spearheaded the digital transformation of Microsoft's most successful cloud business. As Vice President of Microsoft's worldwide OEM division in marketing and sales, he jointly oversaw the company's global distribution and reseller channels.

Acumatica
The Cloud ERP

The Rise of Agentic Execution: Rocketlane CEO Srikrishnan Ganesan on AI's Next Phase in Professional Services

Artificial intelligence has already begun reshaping enterprise software, but much of its early impact in professional services has been concentrated in analytics dashboards, recommendation engines, and productivity copilots. While these tools improve visibility and individual efficiency, the responsibility for coordinating projects, executing tasks, and managing delivery outcomes has largely remained with human teams.

A new phase of AI adoption is now emerging—one where intelligent systems move beyond assistance to actively executing parts of service delivery workflows. This shift toward "agentic execution" introduces the possibility of AI handling repeatable project work, enforcing delivery governance, and identifying risks before they disrupt customer outcomes.

Rocketlane is positioning itself at the forefront of this transition with the launch of Nitro, which the company describes as the first agentic execution platform for professional services organizations. By embedding AI agents directly into delivery plans, the platform aims to automate repeatable implementation tasks while allowing consultants and delivery leaders to focus on strategy, customer alignment, and outcome design.

In this Q&A with ERPNews, Srikrishnan Ganesan discusses how agentic AI could reshape the economics of professional services, why execution has remained the missing layer in enterprise AI adoption, and how delivery teams may evolve as AI agents begin handling portions of implementation work. He also shares his perspective on the emerging "Outcome Era" and what it means for how services organizations measure success in the coming years.

Interview with
Srikrishnan Ganesan,
CEO of Rocketlane

rocketlane

1. Rocketlane describes Nitro as the first "agentic execution platform" for professional services. What fundamentally changes when AI moves from assisting delivery teams to actually executing parts of the work?

With agentic execution, the system doesn't just tell your team what's going wrong or what to do next; it actually does the work that fits clear patterns and guardrails. Nitro's agents sit natively inside your delivery workflows, execute repeatable tasks like configurations, data transformation, migrations, documentation, testing, and validations directly inside those plans. They also generate and adjust project plans, rebalance resources, and your team moves from chasing tasks and updates to supervising outcomes, stepping in to share context, creativity, or complex trade-offs that require human judgment.
This impacts the economics and timelines of projects in a radical way, getting customers to outcomes much faster, and unlocking margins for the business.

This shift also changes how you manage risk and scale. Instead of waiting for red flags in a dashboard, Nitro continuously monitors delivery signals and customer interactions, enforces policies automatically, and escalates when intervention is needed, so projects stay on track by default rather than by heroics.

In practice, you can handle more projects with the same headcount and deliver a more predictable customer experience.

2. Many AI tools in professional services focus on dashboards, copilots, or recommendations. Why has execution remained the missing layer — and why is now the right moment to introduce it?

Historically, most AI in services investments have gone into three buckets: analytics and dashboards, copilots for individuals, and recommendation engines. They improve visibility or speed up a single person's work, but they don't change the fact that humans still have to coordinate across tools, teams, and timelines to get anything done. The result is many AI pilots, but very few that translate into sustained, measurable business outcomes.

Execution has been the missing layer because it's harder, and because it just became possible. To do it safely and reliably, you need a platform that understands delivery context end to end, from scope, resources, constraints, and customer intent, and can operate within strict governance, financial, and compliance boundaries. We're at a moment where the underlying AI, the data foundation inside modern PSAs, and the pressure on services teams have all converged. That makes it possible for AI to take on owned execution, instead of only providing guidance.

3. Rocketlane says Nitro can reduce delivery effort by up to 50% on repeatable workstreams. Which types of services work are best suited for agentic execution today?

The sweet spot today is repeatable, well-defined workstreams where "how" you do the work is known, but "how fast" and "how consistently" are still challenges. For example, Nitro can execute large parts of implementation projects, such as reading SOWs and past projects to auto-generate tailored project plans, configuring systems, transforming data, running validations, and preparing documentation.

These are all areas where teams currently spend a huge amount of manual effort that doesn't really differentiate their services unless you have automation to ensure speed and quality. By letting agents handle the grunt work within clear guardrails, you not only cut delivery effort by up to 50% on these tracks, but you also de-risk execution because the standard path is automated and consistent.

> "With agentic execution, the system doesn't just tell teams what to do next — it actually performs the repeatable work inside delivery workflows."

4. You've introduced the concept of the "Outcome Era." How should services leaders rethink success metrics when AI is responsible for completing work, not just surfacing insights?

In the Outcome Era, traditional metrics like utilization, hours billed, and even project margin are useful but no longer sufficient. When AI is executing parts of the work, leaders need to ask: Are we delivering the outcomes customers were promised, on time and in full, with less effort and less risk? That means tracking metrics such as time-to-value, attainment of outcomes vs. sold value, risk incidents avoided, and delivery reliability across segments and regions.

You also gain new levers at the unit level. You can measure effort per outcome, not just effort per project, and see how much of that effort is handled by AI versus humans. Over time, the benchmark shifts from "How many hours did we bill?" to "How much value did we create per unit of human attention?"

Nitro is built to give leaders visibility into that shift while enforcing the underlying operational rules.

5. Professional services organizations often struggle with flat headcount, margin pressure, and delivery risk. How does Nitro change the traditional economics of scaling services teams?

Traditional services economics are linear: more projects require more people. When headcount is flat and margins are under pressure, that math simply stops working. Nitro changes that relationship by introducing scalable execution capacity that isn't tied to headcount, so you can increase throughput and predictability without proportionally increasing cost.

Because operations automation, delivery governance, and work execution are all handled in one platform, you reduce the hidden costs of coordination, rework, and fire drills that typically erode margins as you grow. Nitro enforces resourcing rules, time policies, and financial controls in real time, so you're doing more profitable, in-policy work that you can forecast and rely on.

Your expert human resources are now focused on the solutioning and customer alignment activities, while the execution of delivery is increasingly delegated to AI. This allows them to touch more customers and spend more time developing best practices and creating leverage for the company.

6. Risk detection is a core promise of Nitro. What kinds of delivery risks can AI realistically surface weeks earlier than humans, and how does that impact customer outcomes?

In professional services, most big issues start as a series of small signals, like a stalled email thread, a change in stakeholder tone, a pattern of missed internal deadlines, or a subtle mismatch between what's being worked on and what was sold as the outcomes. Nitro continuously mines activity across project plans, resourcing changes, and customer interactions to surface these patterns early.

That can mean spotting emerging scope creep, deteriorating sponsor sentiment, recurring blockers across similar projects, or early signs of an under-resourced critical path. Catching these weeks sooner gives teams time to replan, reallocate, and realign with the customer before trust is damaged or value erodes – one of the most direct ways agentic AI improves outcomes.

7. Nitro operates across operations automation, delivery governance, and work execution. Which layer tends to deliver the fastest time-to-value for customers adopting the platform?

For most customers, the fastest time-to-value comes from operations automation and delivery governance. When you turn on Nitro's automation around time policies and financial controls, you immediately remove a lot of manual oversight and copy-paste work across tools. Leaders also see quick wins when Nitro starts identifying risk signals and auto-magically delivers account intelligence out of the box.
Work execution, agent configuration of systems, running tests, and handling migrations are incredibly powerful and high-impact, but they naturally involve deeper setup and integration into your products and ways of working. Documentation agents for hand-offs, design documents, etc., are easier to set up and deliver value faster at the execution layer.

Our approach to working with customers, though, isn't to go after just the low-hanging fruit or the fastest time-to-value use cases. We believe solving the hard problems that have a high impact will create the most valuable outcomes for the teams we work with.

8. As AI agents take on billable delivery tasks, how do you see the role of consultants and delivery managers evolving rather than being replaced?

Agentic execution doesn't remove the need for consultants and delivery managers; rather, it elevates what they spend their time on. Instead of writing every status email, chasing tasks, or manually executing every test case, they become orchestrators of outcomes by defining the right success criteria, shaping implementation strategies, and coaching customers through change.

Their roles shift toward value engineering, outcome design, stakeholder management, and continuous improvement of the playbooks that Nitro executes. In practice, that means more time in high-value conversations – aligning on business goals, resolving complex tradeoffs, and identifying expansion opportunities – and less time buried in spreadsheets and ticket queues.

9. From early customer conversations or pilots, what has surprised you most about how teams are using agentic execution in live client engagements?

One pleasant surprise has been how quickly teams start trusting agents with meaningful work once they see them operate within clear controls. In early conversations, we've seen initial inertia and a trust deficit when starting with agents, and it takes a hackathon or some form of forced exercise for them to experience the change and start trusting and delegating more to AI.

We've also seen that, for some use cases, an 80% accuracy outcome still adds immense value as long as the experience is purpose-built and provides easy ways to validate or fix the output. We had one customer use our documentation agent to create a 38-page design document that used to take them 15 hours, and they reduced the effort to just 2 hours.

> "The benchmark is shifting from 'How many hours did we bill?' to 'How much value did we create per unit of human attention?'"

10. Looking ahead, how do you see agentic AI reshaping professional services over the next 2–3 years, and what role does Rocketlane aim to play in that transformation?

Over the next 2–3 years, I expect professional services to move decisively from intelligent delivery to truly outcome-owned, agentic delivery. AI agents will become standard in handling executional and administrative work, while human teams reorient around designing, measuring, and guaranteeing outcomes across the customer lifecycle.

This should also shrink effort and cost, increasing the appetite for services engagements in a big way.

Rocketlane's role is to be the platform that makes this transition safe, reliable, and measurable for services organizations of all sizes. With Nitro, we're combining PSA, collaboration, and agentic execution in one place so that every project, every stakeholder, and every outcome is managed coherently from signed to value delivered. If we do our job right, agentic execution will simply become how modern services teams operate, and customers will judge success by the outcomes they achieve, not the hours it took to get there.

rocketlane

AI in Manufacturing ERP: Moving from Adoption to Operational Impact — A Conversation with Rootstock's Ohad Idan

Artificial intelligence has moved rapidly from experimentation to mainstream adoption across the manufacturing sector. According to recent research, 94% of manufacturers are now using some form of AI, reflecting a significant shift in how organizations approach data, planning, and operational decision-making. Yet widespread adoption does not necessarily translate into meaningful operational impact. For many manufacturers, the challenge now lies in integrating AI capabilities into core business systems and workflows — particularly within ERP environments where critical operational decisions are made.

At the same time, manufacturers are navigating a complex landscape shaped by supply chain volatility, tariff pressures, and persistent talent shortages. These pressures are accelerating investments in enterprise software and increasing the importance of unified ERP platforms that can support real-time data visibility and AI-driven insights across planning, production, procurement, and finance.

In this Q&A with Ohad Idan, Vice President of Product at Rootstock Software, we explore how manufacturers are progressing along the AI maturity curve, why ERP consolidation is becoming a strategic priority, and where AI is already delivering measurable value in areas such as process optimization, supply chain planning, and operational forecasting. Idan also shares perspectives on governance, workforce augmentation, and the architectural foundations required to support the next phase of AI-enabled manufacturing operations.

Interview with
Ohad Idan,
Vice President of Product,
Rootstock Software

1. Your survey shows that 94% of manufacturers are now using some form of AI. What does "AI maturity" look like in practice, and where do you still see gaps between adoption and real operational impact?

The fact that 94% of manufacturers are now using AI tells us that AI has moved into the mainstream. Manufacturers are no longer wondering, "Should we implement AI?" They're asking, "How can we leverage AI to achieve the most value?"

AI maturity doesn't mean having the most AI tools. It means understanding which decisions can be improved with AI and what business outcomes you're trying to drive. Organizations that are further along are embedding AI into real operational workflows. They aren't just using it to answer questions, but allowing it to influence planning, purchasing, inventory management, and other day-to-day decisions.

The biggest gap we still see is in integration across the enterprise. Many companies are using AI in isolated ways, but it's not yet fully connected to ERP systems or core processes. Without that integration, AI remains informational rather than operational. Another gap is governance. Organizations need to clearly define where AI can assist, where it can recommend, and where humans must remain in control.

2. Predictive AI, supply chain planning, and process optimization stood out as high-growth use cases. Which of these areas are delivering the fastest time-to-value for manufacturers today?

Process optimization is where rapid time-to-value can be achieved because it directly impacts daily operations. The most immediate gains tend to come from addressing repetitive, manual, or reactive work. When AI is embedded into ERP-driven workflows, such as analyzing purchasing delays, checking inventory availability, or evaluating supplier impact, manufacturers can reduce manual steps and respond faster. Those improvements are measurable and show up quickly in operational metrics.

That said, the real acceleration happens when predictive AI, supply chain planning, and process optimization operate together on a unified cloud platform like Salesforce. When demand signals, production data, supplier performance, and financial information are all connected, AI can work with full context rather than isolated data points. Predictive insights can influence planning immediately. In addition, planning changes can flow straight into production, and execution data feeds back into forecasting.

In a fragmented architecture, these use cases operate in silos. On a unified platform, they execute across the enterprise, and that's where you start to see significant impact.

> "AI maturity doesn't mean having the most AI tools. It means understanding which decisions can be improved with AI and embedding those capabilities directly into operational workflows."

3. The survey highlights ERP platform consolidation as a leading priority. Why is a unified ERP foundation becoming essential as manufacturers expand AI initiatives?

AI is only as effective as the data foundation underneath it. If your ERP, CRM, and supply chain systems are loosely connected with middleware or batch integrations, AI is forced to operate with fragmented information and that limits impact.
But beyond performance, there's also architectural risk. ERP is a long-term investment. As manufacturers expand AI initiatives, they need confidence that their ERP platform can scale, adapt, and support emerging capabilities without having to rebuild integrations every time something changes. A unified data model reduces complexity, minimizes integration fragility, and creates a stable foundation for innovation.

Within this architectural context, consolidation isn't just about efficiency. It's about futureproofing the business for what comes next.

4. Despite economic uncertainty and trade pressures, 61% of manufacturers plan to increase enterprise software spending. What's driving this continued investment confidence?

While manufacturers waited for volatility to subside, they reduced investment in new systems. As more organizations have realized that volatility is the new norm and is not going away anytime soon, they are re-evaluating their investment strategies. When demand signals are mixed and costs are volatile, manufacturers need greater visibility and tighter coordination across sales, operations, supply chain, and finance. The increase from 51% in 2024 to 61% in 2026 suggests pent-up demand, but it also signals that manufacturers will be being selective about where they invest. They're prioritizing the initiatives that can improve performance and decision-making, allowing them to respond to changing conditions faster. Enterprise software plays a central role because it strengthens the core systems manufacturers rely on every day.

Enterprise software underpins the operational processes that determine performance. In uncertain conditions, that foundation becomes even more important.

5. Talent shortages and cross-department collaboration remain key barriers to digital transformation. How should manufacturers rethink their operating models to overcome these internal challenges?

That's right, many of today's barriers to digital transformation are internal to an organization, with 33% of manufacturers saying they lack the right talent and 31% citing challenges in cross-department collaboration. These statistics show that execution is often the real constraint.

Due to talent shortages, one thing we see companies doing is trying to offload decision-making to implementation partners. Partners bring expertise, but manufacturers must remain actively involved and own the changes in their business. No external team understands the nuances of an operation better than the people running it.

Closely related to this is underestimating the internal commitment required. Too often, employees working on transformation initiatives are expected to maintain their full day-to-day responsibilities. That leads to rushed decisions, insufficient testing, and lower engagement. Organizations that dedicate time, stay involved, and focus on business outcomes tend to see smoother implementations and faster time to value.

> "AI is only as effective as the data foundation underneath it. Without a unified ERP platform and consistent data model, AI remains informational rather than operational."

6. With tariffs and cost volatility impacting planning, how are modern ERP and planning tools helping manufacturers respond more dynamically to external shocks?

Our survey shows that 39% of manufacturers expect higher raw material costs due to tariffs, and 29% anticipate greater complexity in cost forecasting. This shows that volatility is directly affecting planning. When cost structures and supplier conditions shift quickly, traditional planning approaches struggle to keep up.

Manufacturers need modern ERP and planning solutions that can provide real-time visibility into cost changes and supplier impact. Instead of reacting after costs rise, they need to identify risks earlier and adjust sourcing, pricing, and purchasing decisions accordingly. Insights into inventory levels, supplier performance, and margin impact also allow teams to respond with increased speed and precision.

7. As AI moves deeper into execution-focused applications, how should manufacturers balance automation, decision support, and human oversight?

AI works best when it's applied deliberately and layered. Some tasks are repetitive and low-risk, and those can be automated. For higher-impact decisions, AI can provide recommendations, which humans still need to review and approve. Strategic decisions that may involve trade-offs and broader business context should remain human-led. The objective isn't to remove oversight; it's to reduce cognitive load and allow teams to focus on higher-value work.

As AI becomes more agentic and capable of executing defined tasks, the importance of governance increases. Manufacturers must establish clear guardrails to establish where AI can act independently, when it should escalate decisions for approval, and at what thresholds it should trigger human review. The most mature organizations define these boundaries intentionally. When the balance is right, AI becomes a practical partner in execution rather than a replacement for human judgment.

> "Over the next few years, AI will move closer to the core of daily work. With agentic capabilities operating within defined guardrails, AI will increasingly support execution rather than simply providing insight."

8. From a product and roadmap perspective, how is Rootstock evolving its ERP capabilities to support increasingly complex, AI-driven manufacturing environments?

From a roadmap perspective, Rootstock is embedding AI directly into its ERP workflows to help manufacturers operate more intelligently in increasingly complex environments. We're not building AI for the sake of saying we have AI. We're identifying specific, high-impact use cases inside sales, purchasing, inventory, and production where agents can reduce manual effort, surface insights quickly, and support day-to-day operational decisions. Our approach is to start with capabilities that provide clear value in both in terms of information and assistance. Then we want to evolve toward more agentic functionality where the system can suggest actions and, within defined guardrails, execute tasks responsibly.

A big part of that evolution involves collaboration. Through Rootstock's AI Advisory Council and early pilot programs, we're working directly with customers who use our ERP every day to shape which workflows we prioritize and how those agents behave. We've invested heavily in foundational architecture so we can iterate quickly. In this way, we can add capabilities, refine behavior, and improve usability based on real feedback rather than assumptions. At the same time, we're keeping governance and trust at the center. Core ERP logic remains deterministic, permissions are respected, and agents operate within clearly defined boundaries.

Ultimately, supporting increasingly complex manufacturing environments means making AI practical, embedded, and reliable. The goal isn't to replace ERP logic or human oversight. It's to make ERP more intelligent and responsive as operations become more dynamic.

9. While 73% of manufacturers believe they are "on par" or "ahead" of peers in AI adoption, what truly differentiates AI leaders from the rest?

Yes, the data shows that 73% of manufacturers believe they're at least keeping up with peers in terms of AI adoption, but only 5% consider themselves far ahead of the curve. That gap is important. It tells us AI use is widespread, but reaching the highest level of maturity is still a goal for many.

What differentiates those at the top is how deeply AI is embedded into their operations. They're not just deploying tools they're integrating AI into ERP, supply chain, and production workflows so it can influence real day-to-day decisions. They're also prioritizing data quality and accessibility because they understand AI is only as strong as the context it operates within.

Most companies are expanding AI usage. Leaders go further as they redesign processes around AI-enabled decision cycles, measure impact, iterate, and align AI with clear business outcomes. This type of approach is what moves a company from basic adoption to true AI leadership.

10. Looking ahead, what do you believe will most fundamentally reshape manufacturing technology strategies over the next 2–3 years?

Over the next two to three years, we'll see AI become more operational. That shift means more agentic capabilities operating within predefined guardrails, automating specific tasks, supporting workflows, and reporting findings back for review. As those capabilities mature, AI will move closer to the core of how daily work gets done, rather than sitting on the periphery.

At the same time, platform consolidation will accelerate. As AI becomes more embedded in execution, organizations will find it increasingly difficult to operate across fragmented systems. AI depends on unified, contextual data. This is something fragmented architectures make difficult to maintain. Companies operating on unified platforms will be able to scale faster and adapt more easily as new capabilities emerge.

Workforce augmentation will also become more strategic. Talent shortages are real, and AI will increasingly be used to close skill gaps, preserve institutional knowledge, and guide less-experienced employees through complex workflows. The companies that succeed will be the ones that integrate AI into the fabric of their operations.

About Ohad Idan

Ohad Idan is Vice President of Product at Rootstock Software, where he leads the company's product vision and strategy. With more than 20 years of experience across manufacturing, logistics, and enterprise technology, Ohad brings a keen understanding of how technology can simplify operations, scale businesses, and empower teams. He drives Rootstock's Salesforce-native ERP roadmap, including innovations that support intelligent, agent-driven workflows for product companies. He brings extensive, hands-on expertise across the Salesforce Platform, spanning ERP, CRM, application development, and large-scale enterprise implementations. Prior to joining Rootstock, Ohad was Founder and CEO of Praxis Solutions, a long-standing Rootstock Gold Partner that later joined Rootstock through acquisition. Idan is a Salesforce MVP Hall of Fame inductee, a 13-time Salesforce-certified professional, and a winner of the 2025 Dreamforce Hackathon.

About Rootstock

Rootstock Software provides the leading ERP for product companies, empowering manufacturers, wholesalers, and distributors to turbocharge their operations. Natively built on the Salesforce Platform, Rootstock is a modern, future-proof ERP with a fresh user experience. Users appreciate Rootstock's focus on customer success and its AI capabilities that offer a human-first approach. IT teams value Rootstock's platform as it minimizes the need to coordinate complex customizations and third-party integrations. All of these factors add up to delighted customers. As Rootstock continues to grow, stay tuned to hear about its new customers, career opportunities, and LinkedIn posts

When Platform Migrations Force Bigger Questions: Rethinking Your Procure-to-Pay Strategy

Procurement teams are facing a familiar scenario: their vendor is rolling out a major platform change, and they're being asked to migrate. This time it's Next-Gen Ariba, which begins rolling out this quarter. The multi-year transition brings AI integration, new UX layers, and SAP BTP extensions – and even with migration tools, you're looking at significant transformation work.

For procurement leaders who have spent years building workflows and training users, this replatforming raises a question worth asking: Is now the right time to reconsider your entire procure-to-pay strategy?

Interview with
Jason Didday,
Head of Strategic Partnerships & Alliances
VROOZI®

The Migration Reality

Next-Gen Ariba isn't a simple upgrade. Customers face configuration work, parallel platform management during transition, potential supplier network disruption, and repeated user retraining. The complexity gets worse when you realize why SAP is doing this replatforming: primarily to support AI capabilities through its Joule technology. You're being asked to undergo a major transition not because your current system failed, but because the vendor needs to rebuild the foundation.

This also means integration technology changes – again. Many Ariba customers have already navigated three or four integration technology shifts over the past decade. Each transition created gaps and required rework.

> "The Next-Gen Ariba migration is not simply a system upgrade. It represents a foundational replatforming that requires configuration work, parallel platform management, and renewed user training—largely driven by the vendor's need to enable new AI capabilities."

The Bundling Question

This migration brings up something procurement teams have been dealing with for years: the enterprise software bundling model. Over the past decade, organizations were sold on the single enterprise vendor approach, where the best deal on S/4HANA came packaged with Ariba licensing at a discount.

The result? Many teams ended up with more entitlements than they needed, paying premium prices for capabilities available more cost-effectively elsewhere. The procurement process hasn't changed in 50 years. The core process – requisition, approval, purchase order, receipt, invoice – stays the same. User experience and integration capabilities? Those have changed dramatically.

What to Evaluate Before Committing
Before committing to the Next-Gen Ariba migration path, consider these factors:

Total Cost of Transition: Calculate beyond licensing costs. Include configuration work hours, user retraining, customization rework, and productivity loss during the parallel platform period. Talk to customers who have already started the process – don't just accept vendor estimates.

User Experience: If current adoption has been a struggle, migrating to Next-Gen Ariba may simply relocate the problem. Since the internet and mobile technologies arrived, we've had the capability to deliver consumer-grade procurement experiences. Does your platform actually deliver that?

Integration Stability: Are there stable, proven integration options that won't force you through repeated technology transitions?

AI Value: Do Next-Gen Ariba's specific AI capabilities address your actual business needs, or are they just features you're forced to adopt and pay for?

> "Your procurement technology should ultimately serve your business needs—not the other way around. A major platform migration is the moment to reassess whether your procure-to-pay strategy still aligns with your organization's priorities and budget."

A Strategic Inflection Point

The Next-Gen Ariba migration is at a turning point. The cost and disruption of maintaining the status quo approaches the cost of making a change. For organizations with straightforward procure-to-pay needs, this might be the right time to explore alternatives that deliver better user experience, useful AI innovations, and proven SAP integration at lower total cost of ownership.

Article by Jason Didday

Action Steps

If your organization is facing this migration:

1. ***Conduct True Cost Analysis:*** Factor in internal resource costs, consultant fees, training time, and lost productivity.
2. ***Benchmark Current Usage:*** Document your actual Ariba usage. If you're paying for enterprise software but using basic features, you're likely overpaying.
3. ***Explore the Market:*** Look for procurement orchestration layers that can sit above your ERP and give users a consistent experience regardless of backend changes.
4. ***Test Integration Claims:*** Demand proof. Ask for customer references running similar ERP configurations and detailed integration architecture documentation.
5. ***Consider Phased Approaches:*** Even if you stay with Ariba, a modern buying interface layer can shield users from backend complexity while reducing migration risk.

Making the Call

The Next-Gen Ariba migration doesn't have to be automatic. Treat it as an opportunity to reassess whether your current procure-to-pay strategy still makes sense for your organization's needs and budget.

The procurement technology landscape has changed dramatically since many organizations first implemented Ariba. You don't just have to decide whether to migrate to Next-Gen Ariba – you can ask if now is the right time to find a better fit. Your procurement technology should serve your business needs, not the other way around.

About Jason Didday

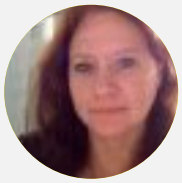
Jason Didday is Head of Strategic Partnerships & Alliances at Vroozi, with extensive experience in enterprise procurement technology and SAP integrations.

VROOZI

The Cost of Bad Job Costing And How to Fix It

If you struggle to accurately measure your job costs, don't feel alone. Job costing is one of the most complex and difficult tasks in a manufacturing business – especially in job shops where almost every job differs from the rest. Many manufacturers consider accurate job costing as their biggest challenge. Many who have mastered the costing challenge also consider it a major benefit of having an ERP system.

Costing involves bringing together a wide array of disparate elements – from materials, freight, labor (direct and indirect) and overhead to quality, scrap, outside processing and more – to produce an accurate picture of what it costs to ship a finished part or job out your door. Coming up with the precise accounting of how much it takes to produce a part or a job is also one of the most important tasks in manufacturing, as it lays the foundation for estimating, quoting, pricing, setting margins and developing competitive strategies that determine the profitability (or not) of your business.



Article by
By Rhonda Gieza,
Team Lead and Operations/
Financial Consultant,
Global Shop Solutions

Article by Rhonda Gieza

When you can't cost jobs accurately, it inevitably costs you time, money and customers. Estimating and quoting become uncertain processes based on guesswork rather than precise data. Inaccurate tracking of labor time drives up labor costs. Slow quoting can lose jobs to more responsive competitors, while overpricing puts you at risk of being underbid. You may think you're making money on a part or a job when you're actually sending it out the door for less than it cost to make.

Compounding the degree of difficulty is today's market requires costing to be a real-time activity, not a historical one. If you can't determine what each job costs (and why) as it moves through the shop floor, you'll always be a step behind any competitor who can.

Turning Chaos into Control

As with many shop floor problems, poor job costing often results from outdated processes and procedures, including:

- Collecting direct labor manually
- Tracking indirect labor haphazardly, or not at all
- Poor inventory control
- Inconsistent purchasing processes
- Lack of *live production data* on the shop floor
- Inaccurate setup and breakdown times
- Failure to account for outside processing, expedited shipping and other peripheral costs
- Failure to account for one man running multiple machines or a machine running unattended

The solution to these and other costing problems lies in having an *integrated erp system* that tracks your costs in real time.

The key word here is integrated, meaning all the modules in the ERP system talk to each other, so that when a critical piece of information is entered in one part of the system, it automatically populates throughout the rest of the system. When people on the shop floor and in the administrative offices have access to the same up-to-date data, they can make quick, informed business decisions to better manage costs and margins.

> "The solution to these and other costing problems lies in having an integrated erp system that tracks your costs in real time."

With ERP, you can track job costs, margins and profitability – for every part, every job and every customer – with amazing precision. ERP allows you to measure direct labor costs for each job and job sequence down to the penny, while identifying and eliminating wasteful indirect time.

Material costs are tracked in real time as jobs move through the production process, allowing you to know the true cost of each job and each job sequence as soon as it is complete. You also know exactly what you have in inventory and what it cost, and can track variance as it occurs by comparing actual versus estimated costs while jobs are in progress.

From a competitive standpoint, knowing your costs enables you to estimate and quote with precision while ensuring margins are where they need to be.

Costs no longer disappear down the black hole as you *track and build costs for projects* that take months to complete. Perhaps most important, real-time costing helps enhance your competitive position by uncovering opportunities to drive cost out of your production process while maintaining margins.

"We used to see where we stood on costs, margins and profits at the end of each project," says Jeremy Finney, Operations Manager for Arc Design, Inc., a custom manufacturer of parts for oil drilling structures. "With Global Shop Solutions ERP, we now track and control everything as we go along. When we complete a job, we know exactly what it cost, whether we made money, and how much. The ability to budget, estimate, and know what projects cost allows us to compete more effectively in our market."

Costing Visibility

Like so many shop floor processes, the key to accurate costing is having access to the data. An ERP system provides this essential costing component by:

- Collecting all your manufacturing data in one system
- Letting you see all your manufacturing in real time
- Keeping tabs on every stage of production

Even with a good ERP system, determining how much individual components contribute to the total cost of finished goods can be a challenge. For example, individual costing components such as labor and materials often get lumped together when determining finished goods costs. When this occurs, it can be hard to pinpoint which cost components are at fault if the cost of goods sold begins to rise.

To address this issue, your erp software should enable manufacturers to *separately track and measure* freight, labor, overhead, outside services, materials and other individual costing components with remarkable precision.

In addition to identifying the percentage of each cost component for work in progress, these programs also provide complete histories of every part that has passed through the shop floor. The ability to compare and analyze old quantities and costs with the cost of current transactions enables more informed management decisions.

With our specialized ERP software, we can now tell how much labor and material went into a specific part, and how the cost breakdown compares with past production of that part," says Mike Zehentner, Vice President of Business Development for Kryton Engineered Metals. "This allows us to identify how a change in production costs (such as an increase in material costs) will affect margins, as well as which processes can be improved to lower costs.

Tracking all the cost elements of a job separately also allows you to identify the most efficient quantity at which to make a specific part. For example, suppose a customer orders a quantity of 150 parts, 50 each on three different delivery dates. Knowing the cost of each element, such as materials and setup times, enables you to determine whether it is more efficient to manufacture the part in three separate batches or make them all at once and hold in *inventory* for the customer.

Your erp software should calculate the sales price based on the costs to build the part and your desired margin. If the marketplace doesn't allow you to hit the desired margin, simply plug in a price and the system will display the margin, allowing you to see whether you would make or lose money on the project.

Compete on Cost, Not Price

Ultimately, the goal with precision costing is to develop the ability to compete on cost rather than price. Of course, every manufacturer needs to offer competitive pricing in order to compete. But when you compete on price without knowing your costs, you could be losing money on each job or leaving money on the table without knowing it.

When you know your costs, you can determine your most profitable products, product lines and customers.

When customers balk at an increase in price, you can show them where your costs have increased and why you need to raise prices. Perhaps most important, knowing (rather than guessing) whether a job will be profitable allows you to decline unprofitable jobs or negotiate more favorable terms with the customer. Or, if it's a new customer that has long-term potential, decide whether to break even or take a small loss in order to obtain a new account.

"When we implemented Global Shop Solutions, it was a real eye-opener to see our true costs for the first time," says Bill Staber, President of Staber Industries, "mainly because we discovered they were higher than we thought. Knowing our true costs tells us how much we can come down on price in regards to competitors, and how low we can go before saying no."

If you're constantly getting underbid by competitors or finding out that you lost money on a job after it shipped, Global Shop Solutions has a better way. Call us today at 800.364.5958, or set up *an appointment online.* We'll help you get your costing—and your *shop floor*—under control.

> "Every manufacturer needs to offer competitive pricing in order to compete."

About Rhonda Gieza

Rhonda Gieza serves as a Team Lead and Operations/Financial Consultant for Global Shop Solutions with nearly 20 years of experience in the manufacturing industry. Gieza's dedication to her craft continues to gain the utmost respect from her peers as she instills best practices for inventory control, job costing and accounting to all of her manufacturing customers.

Global Shop SOLUTIONS

Article by Rhonda Gieza

Building Smarter Observability for Agentic ERP World using Dynamics 365

As enterprise workloads become more agentic, the expectations of ERP systems—and the teams that operate them—are shifting. Batch jobs, workflow orchestration, data import/exports, and background processes are no longer "just" technical plumbing–they are critical pieces of the operational fabric. They deliver timely financial results, accurate supply chain data, and reliable business intelligence driving process optimization.

To support this shift, observability needs to evolve beyond simple logs and reactive troubleshooting. Observability needs to provide meaningful insights into execution behavior, performance patterns, and operational context. This ensures IT teams can run ERP with confidence and reliability.

In Dynamics 365 ERP apps, we've long provided integration with Azure Application Insights to help organizations collect telemetry about user activity, failures, and application behavior. Now, with the expansion of batch telemetry signals — including start/stop events, failure data, throttling conditions, thread availability, and queue behavior — administrators and IT architects can gain deeper visibility into the health of critical batch-based workloads.

Article by
Ritu Joshi,
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Dynamics 365

Why Observability Matters Now

ERP observability historically focused on basic monitoring. It observed which jobs were running, whether a job failed, or whether alerts were triggered. These indicators are useful, but they lack operational context. Modern enterprise workloads are increasingly interconnected, and automation driven. Delays or failures in one workload can ripple outward, affecting downstream processes, reporting accuracy, and service delivery.

At the same time, teams are beginning to rely on AI agents to help monitor, diagnose, and in some cases suggest remediation steps. These tools need high-quality signals to be effective.

Batch workloads are a prime example. Batch jobs directly impact business outcomes, from overnight posting to inventory sync and settlements.
Without execution insights, teams guess root causes and waste time on manual investigation.

What Batch Telemetry Brings to the Table

The monitoring and telemetry capabilities in Dynamics 365 ERP enable customers to send application telemetry to Azure Application Insights for analysis and alerting. The recent expansion of telemetry signals for batch workloads builds on this foundation by adding behavioral data specifically for batch execution patterns.

These signals include:

- Batch start and stop events to show how long jobs take to run, not just whether they completed.
- Failure information that correlates with info log entries and execution context.
- Throttling indicators that highlight contention due to system load.
- Thread availability data that helps reveal when jobs are waiting because capacity is constrained.
- Queue depth metrics shows number of waiting tasks for all queues that are part of the Priority Based Scheduling queues.

Emitting these signals into a customer-owned Application Insights resource means teams can apply their existing monitoring pipelines, dashboards, and alerting logic without changing how data is consumed.

> "Traditional monitoring approaches that rely on alerts and logs are no longer sufficient when autonomous agents are executing business processes—organizations need deeper observability to understand how these systems reason, act, and interact across workflows."

From Visibility to Insight

Once batch telemetry data flows into Application Insights, teams can query it using Kusto Query Language (KQL) and build dashboards that correlate workload behavior with other operational metrics.

This richer observability enables several practical outcomes:

- Faster investigation of execution behavior without sifting through logs.
- Trend analysis to detect regressions or capacity bottlenecks before they impact business cycles.
- More informed capacity planning based on actual observed patterns.
- Alignment of SLA expectations with real operational performance.

Here are some real-world business scenarios that show how telemetry insights are helping customers troubleshoot issues and resolve problems faster.

A global consumer goods company frequently sees high priority jobs completing late. Batch Queue telemetry exposes queue congestion and thread exhaustion, showing when noncritical tasks bury priority workloads.

It helps surface when priority-based scheduling queues build up and delay time-sensitive workloads, while also revealing misconfigured priorities that cause jobs to be processed out of order. It further enables teams to closely monitor queue health during cutover or high-load events, ensuring critical workloads flow smoothly.

Article by Ritu Joshi

Similarly, a finance team's bank reconciliation jobs remain "Waiting" for long periods. Thread telemetry reveals thread starvation—jobs were queued, but threads were fully consumed.

It helps explain why jobs remain stuck in a "Waiting" state by revealing when thread capacity is fully consumed by parallel workloads. It also highlights thread saturation patterns, enabling teams to right-size AOS batch capacity for smoother, more predictable processing.

A Foundation for Intelligent Operations

The expanded telemetry signals are not just a diagnostic tool. They serve as a foundation for smarter operations in an era where agents play an increasing role. High-fidelity Batch telemetry enables experiences like:

- Automated detection of anomalies based on execution baselines.
- Correlation of workload performance with business-critical thresholds.
- Enhanced alerts that tie operational conditions to business impact.

By making execution behavior more observable and actionable, Dynamics 365 ERP helps teams focus on outcomes, not just symptoms.

Getting Started

If you haven't already configured monitoring and telemetry for your environment, the first step is to integrate your Dynamics 365 ERP instance with Azure Application Insights – refer. *Monitoring and telemetry overview – Finance & Operations | Dynamics 365 | Microsoft Learn .*

Once telemetry is configured, expanded batch signals can be toggled on from within system administration and begin flowing to your Application Insights pipeline for analysis.

Rich observability is a core requirement for running modern ERP workloads, especially as organizations adopt more automation and begin exploring agent-assisted operational tooling. By bringing deeper insight into batch execution behavior, our ERP portfolio apps in Dynamics 365 helps IT teams move from reactive troubleshooting toward proactive reliability and informed decision-making.

For more details visit *Available telemetry – Finance & Operations | Dynamics 365 | Microsoft Learn.*

Everything You Need to Know About ISP CRM

Internet service providers (ISPs) can no longer rely on spreadsheets, disconnected tools, or even general-purpose CRM systems if they want to deliver a high-quality customer experience. Managing thousands of accounts with unique service plans and support needs demands purpose-built software. Many providers are adopting ISP CRM tools that centralize data and automate operations to help build lasting relationships with subscribers. This article explains the need for these systems, how they work, and the benefits experienced by providers and customers.

What Is CRM for Internet Service Providers?

CRM for ISPs is software built to manage every stage of a subscriber relationship from initial inquiry to ongoing service and billing. It brings account details, payment history, service plans, support activity, and other customer data into a single system tailored to the operational demands of broadband and telecommunications providers.

ISP CRM platforms include tools for installation management, ticket tracking, technician coordination, and subscription billing. They store technical information about equipment and network performance that general-purpose CRM systems typically lack, giving teams the context they need to diagnose issues and support subscribers.

Key Takeaways

- To provide high-quality service and minimize churn, ISPs need easy, up-to-date access to account, network, and billing details.
- Subscription services and usage-based pricing complicate CRM for ISPs.
- CRM software designed specifically for ISPs centralizes data, automates workflows, coordinates field service, and personalizes support to improve the customer experience.

Article by
Lisa Schwarz,
Senior Director of Global Product Marketing, Oracle Netsuite

ORACLE NETSUITE

CRM for the ISP Industry Explained

Traditional CRM systems often fall short in meeting ISPs' distinct needs, particularly those pertaining to nurturing long-term subscribers and handling complex support and service requests. Internet subscriptions aren't the one-off transactions typically supported by CRM tools; these plans last months or years and frequently change through upgrades, downgrades, and add-ons. Providing effective technical support requires not only accurate customer records but also real-time visibility into hardware configurations and network status, which general-purpose CRM systems don't include.

By contrast, ISP-specific CRM platforms track the full customer relationship, from initial inquiry through disconnection. They capture equipment details, service history, payment patterns, and support interactions, all from a single interface. This tight integration between customer-facing and back-office functions—including sales, customer service, technical support, field operations, and billing—helps ISPs improve service delivery and provide faster support.

How Does a CRM System Benefit ISP Companies?

ISPs handle massive amounts of data, including customer records, network metrics, and billing. Managing it accurately is essential for maintaining service quality and keeping churn in check. An ISP CRM system brings all of this together, giving teams a clear view of account activity so they can respond faster. ISP CRM software provides the following benefits to help providers handle large subscriber bases with complex service requirements:

Lower attrition: CRM systems allow ISPs to identify customers at risk of canceling service by tracking engagement patterns, support history, and satisfaction indicators. Proactive outreach based on these signals—such as following up after repeated support calls or personalized retention offers—can reduce churn and protect recurring revenue.

Greater productivity: CRM tools give support reps complete customer context at their fingertips, decreasing time spent searching for information. Automated workflows handle common requests without the need for human intervention.

Stronger market reputation: Consistent, responsive customer service builds trust and generates positive word-of-mouth referrals. When ISPs resolve issues quickly, communicate proactively about service disruptions, and provide convenient self-service options, subscribers are more likely to recommend them to others and remain loyal over time.

> "Internet service providers can no longer rely on spreadsheets, disconnected tools, or even general-purpose CRM systems if they want to deliver a high-quality customer experience."

Which CRM Features Are Important to ISP Companies?

ISPs need CRM features geared to their operational realities—namely, recurring services, complex billing, and field-based support. The capabilities that matter most optimize elements such as accurate invoicing, technician coordination, and consistency in customer communication. The following highlights some of the most important features commonly requested by ISP companies.

Billing integration: ISP billing is complicated due to factors like recurring charges, usage-based fees, promotional pricing, and add-ons, and it shifts constantly over the life of a customer relationship. Billing integration lets finance teams view invoices, process payments, apply credits, and resolve disputes without leaving the CRM. The system also generates invoices at renewal, applies prorated charges when services change, and produces collection notices for overdue accounts. With all this data located in one place, it's easier for staff to spot warning signs, such as declining usage and repeated billing complaints, that may signal churn risk.

Field service management: *Field service management* features help ISPs schedule service visits, dispatch technicians based on skills and location, and track job progress in real time. Automated notifications alert customers when a technician is en route and request feedback after service calls. For ISPs managing large territories, these capabilities balance technicians' workloads and give managers visibility into team performance. Support teams can also see pending or recent technician visits when responding to calls, so subscribers don't have to repeat information.

Omnichannel support: Subscribers expect prompt responses when contact their ISP via phone, email, chat, social media, or web portal. *Omnichannel* support unifies these interactions so teams see a complete conversation history, regardless of the channel a customer uses. This allows ISPs to offer self-service for simple tasks, such as checking balances or reporting outages, while routing complex issues to live support. Omnichannel data reveals how subscribers prefer to interact, so ISPs can allocate resources and deflect routine inquiries to lower-cost channels.

Centralized account management: ISP accounts generate complex profiles over time, with records covering service plans, equipment assignments, usage history, support tickets, billing records, and communication preferences. Centralized management consolidates this data into a single view that's accessible to any authorized team member, eliminating silos within departments. Support reps can understand a subscriber's situation without asking redundant questions, sales teams can spot upsell opportunities based on usage patterns, and billing staff can resolve disputes by reviewing complete records. Every interaction benefits from the business's collective knowledge.

Contact management: Contact management helps ISPs track multiple individuals associated with a single subscriber—common among business customers with separate technical, billing, and decision-making contacts. By maintaining records for each person, including communication history and preferences, ISPs can tailor interactions appropriately. When a contact calls in, representatives see previous interactions and can personalize the conversation. Marketing teams can segment contacts by role or engagement history to deliver relevant communications. Tracking preferred channels and contact times improves response rates for outbound outreach.

> "CRM for ISPs is software built to manage every stage of a subscriber relationship from initial inquiry to ongoing service and billing."

How Do ISP Companies Use CRM Systems?

CRM systems consolidate data and automate workflows throughout the ISP subscriber lifecycle. Teams rely on the software's capabilities to improve customer support, coordinate service calls, personalize communications, and monitor performance. The following use cases illustrate the practical value of these platforms:

Troubleshooting and ticket resolution: Support teams use ISP CRM software to log issues, assign tickets to appropriate personnel, track resolution progress, and maintain a complete history of every problem. This structured approach prevents issues from falling through the cracks and provides data for identifying recurring problems that may require systemic fixes.

Technician dispatch and scheduling: CRM-integrated field service tools help ISPs schedule appointments, assign technicians, and notify subscribers about technicians' arrival times. Technicians use these tools onsite to access customer information and job details from mobile devices, which improves first-visit resolution rates.

Service onboarding: CRM systems guide new customers through service activation and configuration, automatically verifying and documenting each step's completion. This cuts down on service delivery errors that can create a poor first impression.

Billing and inquiry resolution: CRM tools for ISPs *automate routine billing tasks*, such as generating invoices, processing recurring payments, and flagging overdue accounts. They also give customer service representatives necessary information such as complete invoice histories and all applied charges and credits to quickly answer subscribers' billing questions and resolve disputes without having to switch systems or transfer calls to other departments.

Targeted outreach: CRM data allows ISPs to segment their subscriber base and deliver personalized marketing communications—such as to promote upgrades to customers whose usage has grown, offer retention incentives to at-risk accounts, or announce new services to interested segments.

Performance analytics and reporting: CRM systems generate

reports and provide real-time insights that help ISPs measure performance and identify opportunities for improvement. This data—on support ticket volumes, resolution times, customer satisfaction scores, and other metrics—informs decisions about staffing, process changes, and strategic investments.

Self-service access: Many ISP CRM platforms include customer portals where subscribers can view bills, make payments, check usage, open support tickets, and manage account settings, all without contacting customer service. This spotlights convenience and reduces an ISP's support costs.

> "This tight integration between customer-facing and back-office functions—including sales, customer service, technical support, field operations, and billing—helps ISPs improve service delivery and provide faster support."

Integrated CRM With NetSuite ERP for ISPs

NetSuite addresses common ISP data challenges by integrating its ERP and CRM systems to provide financial management, subscription billing, and operational tools in a single platform. Information about subscriber updates, plan changes, and service appointments automatically flows across departments, eliminating manual entry and minimizing errors. With a unified system, ISPs also gain real-time insights into customer interactions, billing status, and financial performance. This integration optimizes operations, improves service consistency, and supports data-driven decision-making, helping ISPs boost customer satisfaction.

In a market where customers can switch providers easily, reliable service and clear communication are how ISPs hold onto subscribers. An industry-specific CRM system gives them the necessary tools to manage complex accounts, support customers, and keep billing and service records straight—table stakes for hanging on to subscribers. The right platform strengthens coordination among sales, support, field operations, and finance teams by unifying customer and operational data. With this foundation in place, ISPs can deliver a more consistent experience while guaranteeing support for long-term growth.

CRM for the ISP Industry FAQs

Why is a CRM system important for internet service providers?

For internet service providers (ISPs) managing large customer bases, a CRM system centralizes subscriber data and automates support—both essential elements for consistent service. ISP-specific CRM tracks technical details that general-purpose platforms typically miss, such as equipment configurations, network status, and service history.

What are the four principles of CRM?

The four principles of CRM are acquiring customers through targeted outreach, collecting customer details, building long-term relationships by providing personalized service, and using technology to automate processes and analyze data.

About Rhonda Gieza

Lisa Schwarz is Senior Director of Global Product Marketing for the Oracle NetSuite Global Business Unit. She is responsible for driving the go-to-market messaging and positioning for NetSuite solutions.

Prior to this role, Lisa served as Senior Marketing Director for NetSuite Commerce products, focusing on creating awareness and demand generation activities. Prior to joining NetSuite in 2012, Lisa held a variety of roles, including Director of Ecommerce, Latin America Marketing Manager and Enterprise Service Marketing Manager at Sun Microsystems (acquired by Oracle).

ORACLE
NETSUITE

A new, AI-inclusive org design for CX

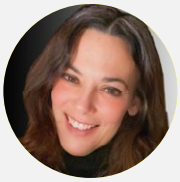
As AI agents join the team, leaders are rethinking roles and responsibilities for digital and human employees alike

Key takeaways

- AI agents are joining the team, but jobs aren't going away
- In customer support, human agents are getting new roles, leaving Tier 1 issues for AI
- Success metrics are shifting from handle time to customer happiness

It's no surprise that AI agents are joining the workforce. They consume and organize information quickly, they follow clear instructions, and they're getting better at empathy every day. They're great to have on the team, and when it comes to customer experience, they're not cutting into headcount—they're changing the whole organizational structure.

"AI is not just a technology shift," says Venki Subramanian, SVP of product management at Freshworks. "It's a fundamental change in how customers interact with you, how your customer service agents do their work, and how the hybrid teams of AI Agents and humans will be managed."



Article by
Laura Rich,
Senior Editor,
Freshworks

Article by Laura Rich

According to *Gartner*, by 2027, half of organizations that planned to reduce customer service headcount through AI will abandon those plans. That's because the work left for humans is more complex and more consequential than what it replaced. You don't cut staff when the remaining work is harder. You prepare them for it.

For CX leaders, this starts with rethinking what happens with your human agents when AI absorbs the volume—every tier shifts upward, and the management layer that once supervised high-volume transactional work is evolving with it, too.

Look before you leap

"You should not be restructuring your teams in the abstract," says Isabelle Zdatny, head of Thought Leadership at Qualtrics XM Institute. "Before you can figure out how AI changes your team, understand what your team is responsible for today."

Zdatny says leaders should rethink four key areas to identify the division of labor between AI and humans:

- ***Insights and analytics:*** Collecting customer feedback, tracking scores, producing reports, building dashboards
- ***Experience design:*** Journey mapping, human-centered design, closed-loop processes delivered through customer service and customer support
- ***Change management:*** Systematically understanding how to improve customer experiences and conveying to the entire organization how to act on and deliver those experiences consistently
- ***Strategy and vision:*** Defining brand promises, priorities, and customer experience principles

Zdatny's research has found that most companies overinvest in the first bucket (analytics) and underinvest in the other three. That imbalance made sense when insights were manual and labor-intensive. But AI is going to disproportionately automate the insights and analytics function. "So, the other three—design, change, and strategy—become more important, not less," she says. Because they're more nuanced, they're better in human hands.

> "AI is not just a technology shift, it's a fundamental change in how customers interact with you and how your customer service agents do their work."
>
> -Venki Subramanian
> SVP, Product Management, Freshworks

Human roles shift

In customer support, a *human-AI customer service* structure starts with a shift in roles, which have traditionally been categorized in part by query types: Tier 1 handles volume — frequent, low-complexity contacts. Tier 2 and above handle the harder cases requiring judgment, institutional knowledge, or emotional attunement. But AI agents are increasingly good at Tier 1 support.

According to *Freshworks' Customer Service Benchmark Report 2025*, AI-powered conversational support now resolves up to 98% of issues on first contact, and in the retail sector in particular, AI agents now handle up to 53% of customer queries entirely on their own without escalating them to human support.

As AI agents have taken on more Tier 1 queries, 43% of companies in the report have seen productivity gains. Every human agent takes on a new role — Tier 2 and above, able to handle more complex queries.

inMusic, a global music technology company, created a "customer champion" role as a result of more automation on its support desk.

"The technology got to the point where we were able to take agents away from the front lines and restructure," says Bill Waller, head of customer service operations. "Our KPIs got to where they needed to be, and then the question became 'what's the next step?'" The customer champion role was that next step. Freed from basic queries, agents gained time for knowledge creation and advanced problem-solving, and a new "customer champion" focused on quality analysis and continuous improvement.

At *Broad River Retail*, a former content manager whose role had been focused on building and maintaining the knowledge base used by both human and AI agents was elevated to a managerial role overseeing the performance of

the AI agents, checking whether responses aligned with what human agents were telling customers, flagging breakdowns. "It was a mind shift," says Wes Dudley, Broad River's VP of customer experience, who created the role for his team.

> "AI is pushing organizations to rethink how customer experience teams are structured, shifting from siloed functions toward more connected, insight-driven operations."

New metrics for managers

Identifying roles and moving folks around is one thing, managing the new structure—and having *digital employees* for the first time—is new ground for leaders as well. It calls for new ways of tracking performance, and new skills to manage employees who aren't human.

Supervising a high-volume transactional team is largely about monitoring: first response time, handle time, resolution rates, and such. But when human agents concentrate in judgment-intensive escalations — the billing dispute with a longtime customer, the complaint where tone matters as much as resolution — handle time is the wrong thing to optimize for, according to one CX leader.

He tracks CSAT instead. It resonates across functions, reflects whether human interactions are actually delivering, and doesn't penalize agents for taking the time a difficult case requires. Response time and handling time become "a little bit redundant" when AI handles the volume, he says.

Managing a hybrid team means having humans accountable for AI performance, not just AI deployment.

The organizations that get this right won't just have efficient AI. They'll have human agents sharper at the work that matters most, managers who know how to develop them, and AI colleagues that keep improving because someone is accountable for making sure they do.

freshworks

Article by Laura Rich

How to Select the Right ERP System for Your Manufacturing Business in 2026

An expert, operations-first guide for manufacturers to select an ERP in 2026. It translates strategy into measurable requirements, defines testable selection criteria and features, clarifies deployment and licensing choices, and outlines a disciplined due-diligence and implementation approach to de-risk the investment and accelerate ROI.

Introduction

Selecting an *Enterprise Resource Planning system in 2026* is as much an operations and financial decision as it is an IT one. The right choice should compress lead times, improve OTIF, reduce scrap and cost-to-serve, and give leaders real-time control of the plant and supply chain.

This guide walks you step-by-step through defining measurable requirements, weighing deployment and licensing options, evaluating modern capabilities, APS, quality, traceability, analytics, and shop-floor connectivity, and running a disciplined due-diligence and rollout that de-risks the investment and accelerates ROI.

Article by
Brent Dawkins,
Director of Product Marketing,
QAD

Key takeaways for 2026

Use these as filters for every discussion, demo, and proposal.

- Prioritize production planning and APS depth, real-time inventory and traceability, robust quality and financials, strong user experience with mobile data capture, and ecosystem fit proven through practical, testable capabilities.
- Match deployment and licensing to control, scalability, IT burden, and cost profile by weighing on-prem for control, cloud for flexibility, SaaS for lowest IT overhead, and perpetual vs. subscription based on cash flow and total cost of ownership.
- Run a disciplined process with RFI/RFP scoring, scripted demos using your data and edge cases, reference checks and site visits, a security review, and proof of value before contracting.
- Consider QAD for manufacturing-centric ERP needs: its deep roots in discrete and process manufacturing, strong production and quality modules, global compliance support, and industry-specific cloud capabilities make it an excellent fit for complex, regulated environments where operational precision and scalability are critical.

Start with strategy: define objectives, manufacturing modes, and success metrics

Anchor ERP selection in business outcomes. Before you look at screens, define the improvements you need in throughput, quality, lead time, inventory turns, and cash conversion. Then translate those into measurable targets that become your acceptance criteria and ROI baseline.

Clarify your operating modes: Engineer-to-Order (ETO), Make-to-Order (MTO), Make-to-Stock (MTS), Configure-to-Order (CTO), process, repetitive, or job shop. Each mode changes the requirements: ETO needs deep engineering handoff and project accounting; MTS involves demand planning accuracy; mixed-mode requires flexible BOM and routing structures.

Build a cross-functional selection committee with operations, quality, supply chain, finance, and IT, backed by executive sponsorship. Define governance, decision rights, and a scorecard so trade-offs are explicit and tied to Return on Investment (ROI).

- Document top bottlenecks across production, inventory, quality, and finance.
- Prioritize objectives like cost-to-serve reduction, OTIF improvement, and scrap reduction.
- Classify manufacturing modes and variation drivers to shape feature needs.
- Translate goals into measurable KPIs and target improvements (e.g., +15% throughput, –20% WIP days, +3 turns).
- Create a cross-functional selection committee with executive sponsorship and clear decision rights.

ERP selection criteria for manufacturers in 2026

Focus on capabilities you can verify. Production planning and Advanced Planning and Scheduling (APS) must handle constraints, finite capacity, alternate routings, sequence-dependent setups, and what-if scenarios. Insist on realistic scheduling that considers labor, tools, and materials simultaneously, not just pretty Gantt charts.

> "Selecting an Enterprise Resource Planning system in 2026 is as much an operations and financial decision as it is an IT one."

Inventory and traceability should be real-time with lot/serial control, backward/forward genealogy, and warehouse execution that supports directed putaway, picks, cycle counts, and mobile data capture. Validate that BOM explosion and backflushing align with your materials policies and that exceptions trigger alerts.

Quality management must be embedded: inspection plans, NC/CAPA workflows, SPC, and digital audit trails. Compliance needs differ by industry, but you should expect e-signatures, revision control, and immutable logs. On the finance side, look for robust costing (standard, actual, average), variance analysis, and multi-entity consolidation with intercompany eliminations.

User experience is a performance issue. Role-based dashboards, KPIs, and mobile UX on the shop floor drive adoption and data quality. Confirm that power users can build no-code analytics from production, quality, and finance data and that OEE metrics are available without heavy customization.

Article by Brent Dawkins

Key features checklist: what a modern manufacturing ERP must include

Use this checklist as a starting point to qualify fit. It focuses on features that influence day-to-day execution and margin control while minimizing custom work. You will need to augment based on your organization's requirements and objectives.

Finite scheduling and capacity planning must respect constraints and simulate alternatives across machines, labor, and materials. What-if capabilities should show the impact on promises, overtime, and expedite costs.

Shop-floor connectivity, scanning, terminals, and machine data, should feed Overall Equipment Effectiveness (OEE) and trigger alerts, while supplier collaboration and embedded analytics make performance visible in real time.

Tech trends shaping ERP in 2026: AI, IoT, cloud, and security

AI is moving from pilots to practical gains: demand forecasting that reduces bullwhip, inventory optimization that balances service and working capital, and anomaly detection that flags scrap risks and maintenance issues earlier. Expect AI-assisted scheduling that proposes feasible plans under tight constraints.

IoT sensor integration extends visibility from machines to ERP. Machine data drives predictive maintenance, real-time OEE, and automatic production reporting that reduces manual entry. The value comes from closed-loop actions, alerts that create work orders or reschedule automatically.

Cloud and Software as a Service (SaaS) improve scalability, update cadence, and time-to-value while lowering upfront costs. In parallel, zero-trust security, encryption, and compliance automation are table stakes; evaluate them with the same rigor as functional features.

AI + IoT + cloud are only valuable when tied to measurable outcomes: higher OTIF, fewer stockouts, shorter lead times, lower TCO, and faster payback.

> Anchor ERP selection in business outcomes. Before you look at screens, define the improvements you need in throughput, quality, lead time, inventory turns, and cash conversion."

Deployment and licensing decisions: on-prem, cloud, or SaaS; perpetual vs. subscription

Choose deployment based on control, latency, regulatory posture, and IT capacity. On-prem delivers maximal control and can address strict data residency or low-latency machine connectivity, at the cost of higher internal support and slower upgrades.

Cloud hosting offers flexibility, elastic scaling, and faster time-to-value while retaining more control than multi-tenant SaaS. SaaS minimizes IT overhead and provides frequent updates with predictable OPEX, but may limit deep customizations and require disciplined change management.

Licensing should match cash flow and horizon. Perpetual licenses concentrate costs upfront and can lower long-run Total Cost of Ownership (TCO) for stable footprints. Subscriptions align expense to value realization, favor multi-site growth, and reduce risk if needs change.

Integration architecture and openness: PLM, MES, WMS, and APIs

Your ERP will sit at the center of a digital thread. Favor systems with open, well-documented Application Programming Interfaces (APIs), REST, webhooks, and event streaming, for near real-time flows without brittle customization.

Validate native connectors for Product Lifecycle Management (PLM)/CAD, MES, WMS, CRM, and supplier portals. Confirm BOM, routing, and item master structures align so engineering handoff is clean and versioned, and that routings and work centers synchronize without rekeying.

Plan master data governance: define ownership, golden records, and reference data synchronization cadence. Poorly governed items, BOMs, vendors, and customers will torpedo scheduling accuracy and financial integrity.

Probe the roadmap and modularity. You want the option to add capabilities, APS, quality, warehouse, analytics, without

invasive custom code. Evaluate data models, extension frameworks, and upgrade-safe configuration patterns.

> "AI + IoT + cloud are only valuable when tied to measurable outcomes: higher OTIF, fewer stockouts, shorter lead times, lower TCO, and faster payback."

Security, compliance, and data governance

Set baseline security expectations: role-based access control, SSO/MFA, least-privilege policies, and encryption in transit and at rest. Ask how identities are managed across plants and partners and how access is audited.

Auditability matters for quality and regulated environments. Expect comprehensive change logs, e-signatures, and CFR Part 11–style controls where applicable, with timestamped, immutable trails for master data, BOM/ECN, and production records.

Disaster recovery and data sovereignty should be explicit: backup frequency, Recovery Point Objective (RPO), Recovery Time Objective (RTO), and geo-redundancy. Confirm data residency options, supplier compliance tracking, and how the platform supports investigations without performance penalties.

Costing the program: TCO, ROI, and budgeting for implementation

Build a Total Cost of Ownership (TCO) model over 3–7 years that includes licenses/subscriptions, infrastructure, implementation, integrations, data migration, testing, training, and support. Model scenarios for single-site vs. multi-site and conservative vs. accelerated adoption.

Quantify benefits tied to your KPIs: inventory turns, throughput, scrap reduction, labor efficiency, expedited freight reduction, and faster period close. Translate improvements into cash and margin effects to estimate payback and Return on Investment (ROI).

Budget realistically for data cleansing, cutover, and hypercare. Data preparation is the hidden critical path; plan for item, BOM, routing, vendor, customer, and on-hand cleanses with validation cycles.

Reserve contingency for reporting, edge-case integrations, and incremental training. Treat analytics as part of scope—operational dashboards and finance reports drive adoption and illuminate value realization.

- TCO line items: software, services, integrations, data migration, testing, training, change management, support.
- Benefit levers: +turns, −WIP, −scrap, −overtime, −expedites, +OTIF, faster close.
- Scenarios: single vs. multi-site, phased vs. big bang, on-prem vs. SaaS.
- Governance: track budget vs. value with quarterly KPI reviews.

Vendor due diligence and selection process

A disciplined process reduces risk and bias. Start broad with an RFI, score against must-haves, and shortlist 2–3 options for deeper evaluation. Use a weighted scorecard aligned to your objectives.

Run scripted demos using your data, BOMs, routings, and edge cases. Include exceptions: late supplier ASNs, machine downtime, ECN mid-build, and intercompany transfers. Record outcomes and time-to-complete for apples-to-apples comparison.

Perform reference checks in your sub-vertical and footprint. Visit sites to see shop-floor data capture, scheduling discipline, and inventory accuracy in the wild. Pair this with a security review covering identity, encryption, DR, and compliance posture.

Before contracting, execute a proof of value to validate performance at scale, integration fit (APIs), and operational usability. Negotiate SLAs, uptime, support response, and roadmap commitments tied to measurable acceptance criteria.

1. Issue an RFI/RFP with prioritized requirements and scoring weights.
2. Conduct scripted demos using your data and edge cases.
3. Score fit, risk, and TCO/ROI across functional, technical, and operational dimensions.
4. Run security and compliance reviews; validate APIs and integration patterns.
5. Check multiple references and conduct site visits where possible.
6. Execute a proof of value with success criteria and load/performance checks.

Article by Brent Dawkins

7. Align on implementation plan, roles, and change-management approach.
8. Negotiate SLAs, uptime, support tiers, and commercial terms.

> "Focus on capabilities you can verify."

Implementation approach: phased rollout, change management, and training

Favor a phased, value-led rollout. Start with a pilot plant or a module that solves a high-pain area, planning, inventory accuracy, or quality, so users see quick wins and momentum builds.

Prepare data migration early with repeatable extracts, cleanses, and validation cycles. For critical processes, plan parallel runs to compare outputs and stabilize before cutover. Define clear entry/exit criteria for each phase.

Establish a super-user network and role-based training paths. Blend classroom, on-the-job, and quick-reference guides. Measure adoption with usage telemetry, data completeness metrics, and cycle-time deltas.

Define hypercare with SLAs and triage, then transition to steady-state governance. Hold monthly ops-finance reviews to track KPI movement against your ROI model and to prioritize incremental improvements.

Frequently Asked Questions

What criteria should manufacturers use to select an ERP system in 2026?

Prioritize APS depth, real-time inventory and traceability, embedded quality, robust financials with multi-entity support, and strong UX with mobile data capture—plus open APIs for PLM/MES/WMS integration and security that meets zero-trust expectations. Verify each with scripted demos using your data and edge cases.

How should manufacturers compare cloud, SaaS, and on-prem ERP and licensing models?

On-prem maximizes control and can serve latency-sensitive or regulated environments but raises internal IT burden and CapEx. Cloud hosting offers flexibility and faster time-to-value with moderate control. SaaS minimizes IT overhead and speeds updates. Perpetual licensing suits stable horizons with higher upfront cost; subscription aligns expense to value and scaling but may cost more over long horizons. Balance choices against TCO, ROI, and governance needs.

Which process best de-risks ERP vendor selection and ensures ROI?

Run an RFI/RFP with weighted scoring, conduct scripted demos using your data, perform reference checks and site visits, complete a security review, and execute a proof of value with measurable success criteria before contracting. Tie decisions to KPI targets and a 3–7 year TCO/ROI model.

What KPIs should we track to validate ERP value post-go-live?

Track OTIF, lead time, inventory turns, WIP days, schedule adherence, OEE, scrap and rework rates, plan vs. actual labor and material variances, expedited freight, days to close, and user adoption metrics. Compare against pre-implementation baselines to quantify ROI.

How long should ERP selection and implementation take for a manufacturer?

For a mid-size single-site manufacturer, expect 8–12 weeks for selection (RFI/RFP, demos, PoV) and 6–9 months for phased implementation of core modules. Multi-site or complex ETO footprints can extend to 12–18 months. The critical accelerators are clean data, decisive governance, and a focused scope for the first phase.

About Brent Dawkins

Brent is QAD's Director of Product Marketing with over 20 years of manufacturing and supply chain experience. In his spare time, you can find him hiking the Rocky Mountains of Colorado, coaching youth hockey or enjoying time with family.

About QAD

QAD Inc. is a leading provider of next-generation manufacturing and supply chain solutions in the cloud. To succeed in a turbulent world, facing disruptions in supply and fluctuations in demand, manufacturers and supply chains must rapidly respond to change and seamlessly optimize agility, efficiency, and resilience for effective customer service. QAD delivers Adaptive Applications to enable these Adaptive Enterprises. Founded in Santa Barbara, California, QAD has customers in 84 countries around the world. Thousands of companies have deployed QAD enterprise solutions including enterprise resource planning (ERP), digital commerce (DC), supplier relationship management (SRM), digital supply chain planning (DSCP), global trade and transportation execution (GTTE) and enterprise quality management system (EQMS). To learn more, visit www.qad.com or call +1 805-566-6100. Find us on LinkedIn, Twitter, Facebook and Instagram.

Logistics Trends To Act On in 2026: What's Shaping the Industry Right Now

If logistics ever has a "quiet year," 2026 won't be it. Between global trade and supply chain disruption, tighter regulations, and customers who expect Amazon-level transparency whether they're shipping pallets or parcels, the pressure is on.

At the same time, technology is moving just as fast. AI is no longer experimental—it's being embedded into routing, forecasting and warehouse operations. With new tools entering the market and freight volumes showing signs of stabilizing, many in the industry are cautiously optimistic that the worst of the "Great Freight Recession" is behind them.

But optimism alone won't create resilience. To stay competitive, logistics businesses need to be agile and adaptable, with *visibility across every stage of your operations*. That's easier said than done when competition is fierce as ever, labor remains a headache and disruptions feel less like exceptions and more like the norm.

That's why the logistics trends shaping 2026 focus on four things that work best together: intelligence, efficiency, sustainability and people. And thankfully, there are trends on the list—like the boom in accessible artificial intelligence (AI) capabilities—that can help you achieve unity between these pillars.

Article by
Kris Pazhayanoor
Senior Product Manager,
Aptean

Overall, these transportation and logistics industry trends aren't about chasing shiny new fads. They're about operating smarter in an increasingly demanding environment.

So, what does this all mean for you? Let's break down the logistics industry trends that matter most heading into 2026 and beyond.

1. Technology-Driven Logistics

In 2026, logistics technology trends will move beyond automation toward intelligence—enabling faster, smarter decisions in real time, often before issues arise.

AI-Powered Logistics Operations

While many organizations are hung up on the *implementation challenges* and *confusing buzzwords* surrounding AI, it's easily the most transformative logistics trend heading into 2026—ignoring or delaying it would be foolish. Not because it replaces people, but because it reshapes how decisions are made, how systems interact and how quickly your organization can adapt.

What's different now is leading logistics organizations are moving beyond isolated AI use cases toward connected intelligence. AI is working across transportation, warehousing, procurement, finance and customer operations to drive unrivalled insights, predictive alerting and organization-wide automation.

The rise of agentic AI marks another shift. These systems can plan and execute multi-step tasks, from monitoring vehicle health and predicting maintenance needs to evaluating carrier performance and triggering corrective actions. The result is less off-the-road time, lower costs and more resilient operations.

AI is also redefining routing and execution. The best AI route optimization systems account for traffic, Hours-of-Service rules and capacity, reducing empty miles and improving delivery reliability. And they combine these features with powerful AI tools to allow automated route refinements and smarter decision-making.

As technology trends in logistics continue to accelerate, your organization can embed AI as a connected capability, rather than a standalone tool, so that you're best positioned to keep up with change and stay ahead in 2026 and beyond.

> "Logistics is evolving rapidly as companies adopt new technologies to improve visibility, efficiency and resilience across their supply chains."

Smarter Resource Allocation in Real Time

Following on from a turbulent 2025, where *82% of companies reported tariff-related impacts* and *increasing weather and climate disasters* continued to bring disruption, 2026 looks set to require even more agility and strategic resource planning. Yet many logistics operations still depend on manual or rule-based processes for inventory and fulfillment. When resources are tight, that lack of flexibility quickly turns into risk.

This year, you can close the gap with intelligent resource allocation powered by real-time data and AI-connected cloud software. By linking live inventory, warehouse, maintenance and logistics systems, stock and resource levels update automatically and alerts trigger as exceptions occur.

With this accurate data in place, your systems can continuously balance inventory across warehouses, vehicles and drivers across routes, and labor based on real-time demand. If congestion builds at a distribution center, freight and driver assignments can be adjusted automatically before delays escalate—like a built-in logistics coordinator that never sleeps.

Coupled with AI-driven warehouse automation that reduces repetitive work, the result is fewer bottlenecks, better asset utilization and lower operating costs. In a tight-margin environment, smarter resource allocation is no longer optional. It's a defining logistics trend for 2026.

Planning For What Comes Next With Digital Twins

As logistics networks grow more complex, scenario planning will become essential in 2026. Digital twin technology enables this by allowing your organization to test drive potential solutions before implementing them.

Using historical and real-time data, digital twins or *strategic planning capabilities* can simulate peak-season demand, stress-test disruption scenarios and evaluate alternative routes or transport modes without risking live operations.

With the *digital twin market projected to grow by 39% annually through 2032*, adoption is accelerating fast and these tools will help your logistics teams move from reactive firefighting to proactive planning. As volatility increases, the ability to model outcomes in advance is becoming a critical advantage for controlling costs and maintaining service levels.

2. Sustainable Logistics

Sustainability is quickly becoming business critical. Tighter regulations and rising customer expectations are driving *greener logistics practices*, but the shift isn't just about compliance—it also delivers real economic value through lower operating costs, improved efficiency and smarter use of assets.

The Expanding Role of Electric Vehicles in Logistics

Electric fleet adoption is accelerating fast, with the *US electric vehicles market projected to grow to $159.7bn by 2030*. It's safe to say in the coming years, electric vehicles will play a larger role in last-mile delivery and urban distribution, driven by emissions regulations, falling costs and corporate decarbonization goals that increasingly align with commercial reality. With this in mind, you must begin laying the groundwork in 2026 to prepare.

For logistics operations, the benefits go well beyond sustainability. Electric vehicles offer quieter operation, improved efficiency and lower fuel costs over time. They also require less maintenance due to:

- Fewer moving parts
- Reduced brake wear from regenerative braking
- More predictable service schedules, which means less downtime and lower operating risk

> "Real-time data and advanced analytics are becoming essential tools for logistics providers looking to make faster, more informed decisions."

But challenges remain, particularly around range and charging infrastructure in some regions. Even so, ongoing innovation is steadily expanding where and how electric vehicles make sense across logistics networks. So now is the time to consider how an electric vehicle strategy can be incorporated smartly in your operations.

Freight Efficiency Through Less-Than-Truckload Shipping

Less-than-truckload (LTL) shipping isn't new, but efficiency gains are firmly back in focus. When combined with *advanced route optimization*, LTL networks can further reduce empty miles, cut fuel consumption and maximize truck capacity. For manufacturers and distributors moving smaller loads, that efficiency is increasingly important.

The sustainability impact is immediate. Fewer miles driven means lower fuel consumption, reduced greenhouse gas emissions and less congestion in busy corridors, all while shrinking the carbon footprint per shipment.

What's more, with modern planning tools and integrated *transportation management systems (TMS)*, LTL becomes easier to manage, more predictable and far less manual.

Beyond environmental benefits, LTL aligns with cost-control goals. By sharing transportation capacity, you can reduce per-shipment costs while supporting more sustainable logistics operations—a win for both your business and the environment.

Smart Platforms Turning Sustainability Into Strategy

Sustainability doesn't come from good intentions alone. It comes from operational intelligence baked into everyday logistics decisions. In other words, it's not about grand promises. It's about thousands of small, smarter choices made every day that get you to your destination.

AI-powered logistics platforms act like a GPS for your supply chain. Digital route planning reduces empty miles and fuel consumption, while TMS software ensures carrier selection aligns with environmental goals. These systems underpin your sustainability strategy as a foundational part of your operations, cutting carbon emissions while improving overall performance. So, your teams can balance cost, service and sustainability in real time without a mountain of work.

These platforms now support sustainability by:

- Consolidating multiple orders into fewer trips
- Optimizing routes to reduce unnecessary miles
- Using 3D load planning to maximize vehicle capacity
- Selecting the most sustainable and efficient transport mode per shipment

Article by Kris Pazhayanoor

- Optimizing carrier selection to adhere to environmental requirements

The result is measurable emissions reduction driven by smarter planning, not added effort. Looking toward 2026, these platforms will continue to evolve from reactive tools into predictive systems, helping your organization anticipate demand, avoid inefficiencies and meet both business goals and environmental responsibilities at the same time.

Reusable and Smarter Packaging

As *European sustainability targets tighten* and financial incentives grow, well-managed reusable packaging is becoming a core logistics capability—not a niche initiative—especially when paired with smart tracking. Shifting from single-use materials to returnable containers reframes packaging as a reusable asset rather than disposable waste.

With intelligent tracking in place, containers remain visible and in circulation. You can monitor availability, trigger returns and prevent assets from sitting idle or leaving the supply chain altogether.

Beyond sustainability, reusable transport packaging delivers operational benefits including:

- Improved worker safety and ergonomics through better design
- Standardized sizes and weights that reduce injuries
- Better product protection in transit
- Extended shelf-life for fresh goods
- Long term cost savings over repeated use

The downside is: these advantages depend on effective container management. When assets are lost or underutilized, value erodes quickly, making visibility and return workflows essential. That means you need the right software in place to keep tabs on your assets.

> "Automation and robotics are helping logistics organizations reduce manual processes, improve accuracy and address ongoing labor shortages."

3. Visibility and Data

End-to-end supply chain visibility is no longer a differentiator but a foundation, enabling transparency, compliance and performance across increasingly complex supply chains.

Customer-Centric Visibility That Builds Trust

Customer-centric visibility represents one of the most significant shifts reshaping logistics today. The driving force? Customer expectations have reached new heights—*90% of consumers now expect full visibility into their shipment status* throughout the delivery journey. And these expectations span to B2B, not only consumer deliveries.

To keep up with this trend, your logistics operation should offer personalized dashboards where customers can visualize every movement of their shipments in real time. What's more, transparency builds trust. When customers understand what's happening and why, relationships strengthen even when disruptions occur.

The technology enabling this visibility continues advancing rapidly. For example, IoT sensors that previously only tracked location now monitor dozens of variables including temperature, humidity, light exposure, shock events and even package integrity. And integrated proof of delivery systems can deliver automated notifications and delivery tracking portals.

Compliance, Traceability and Trusted Data

For all industries, particularly highly regulated segments like pharmaceuticals and food and beverage, risk management and data visibility are essential for meeting compliance requirements while also supporting operational performance and customer trust.

As regulations around traceability, driver qualifications, Hours-of-Service and vehicle roadworthiness continue to evolve, disconnected systems turn compliance into a manual, costly and error-prone exercise. And the rapid adoption of AI systems is making this even more top of mind in 2026 as customers and regulators alike question data security, bias and governance.

Technology is helping to address these challenges by delivering accurate end-to-end tracking and digital records that improve traceability and provide a trusted source of truth for product origin, handling conditions and chain-of-

custody events. This is especially valuable for recalls, audits and cross-border compliance, where accuracy matters most.

At the same time, rising customer expectations are pushing logistics organizations to unify compliance and visibility efforts. *Integrated AI platforms* that connect transportation, warehouse, financial and operational data simplify audits, reduce risk and deliver transparency across your business. Ensuring you use systems from established vendors with clear AI, cloud and data policies will ensure you're compliant.

In 2026, supply chain visibility will extend well beyond tracking, becoming a strategic capability that shapes compliance, service levels and decision-making across logistics operations.

4. The Logistics Workforce

Among the most overlooked logistics trends 2026 will expose is the importance of supporting the people who keep supply chains moving. Long-term logistics success still depends on attracting, empowering and retaining a skilled, resilient workforce.

The Ongoing Labor Shortage in Logistics

Labor shortages remain one of the most persistent logistics industry trends, affecting both warehousing and transportation. While reports and experiences vary across regions, these gaps continue to drive up labor costs, strain service reliability and make it harder to respond to disruptions across the supply chain.

As a result, many logistics organizations are rethinking how work gets done. *Technology is increasingly used as a force multiplier*, helping smaller teams operate more efficiently through automation and AI-driven tools, as well driving growth without requiring additional resources.

Rather than replacing workers, these systems reduce repetitive tasks and support faster, more consistent decision-making. By 2026, companies that combine skilled people with intelligent technology will be better positioned to control costs, maintain service levels and operate resilient logistics networks despite ongoing labor constraints.

> "Sustainability is moving from a 'nice to have' to a strategic priority as organizations work to reduce emissions and meet regulatory expectations."

Upskilling for a Human-Plus-Technology Future

As AI and automation move into everyday logistics operations, the priority for 2026 is building confidence and capability. Many employees are being asked to work alongside tools that are still new to them, which means reassurance, training and usability matter as much as the technology itself.

Leading organizations are investing in practical upskilling to help teams understand how intelligent systems support their roles. When employees trust and know how to use these tools, adoption accelerates, decision-making speeds up and errors drop.

Usability is critical. Platforms with intuitive interfaces, no-code tools and built-in guidance allow planners, dispatchers and warehouse teams to act on insights without technical expertise. With expert support and Intelligence-as-a-Service models, AI can be embedded into daily workflows in a way teams can use confidently.

Structured onboarding, ongoing learning and role-specific coaching help employees interpret data and manage more automated processes. Meanwhile, in-cab driver tools, mobile apps and connected devices are improving routing, safety, compliance and communication across the workforce.

Looking toward 2026, the logistics organizations that invest in upskilling alongside technology adoption will be best positioned to scale efficiently, adapt to disruption and build a more resilient, empowered workforce.

Driver Experience as a Competitive Advantage

Driver wellbeing and facility experience is a growing strategic priority across logistics. Safety, comfort and efficient working environments now play a direct role in retention, service reliability and capacity access.

For drivers, facility experience matters. Inefficient gate processes, excessive paperwork and yard congestion waste time, eat into Hours-of-Service limits and reduce earning potential. Digital check-in, mobile verification and automated

yard workflows help reduce dwell time, improve throughput and limit emissions from idling vehicles.

What's more, access to clean rest areas, showers, safe parking, flexible scheduling and more predictable shift patterns can significantly improve working conditions and retention. Giving drivers greater input into routes or shift preferences is becoming a differentiator for employers competing for scarce talent.

Smarter systems simplify compliance with drivers' hours, tachographs and roadworthiness requirements, lowering the administrative burden while supporting safer driving practices. The result is improved safety outcomes, more predictable operations and a better experience for drivers and carriers alike.

In line with 2026 logistics trends, companies prioritizing safe, efficient facilities and driver-focused processes are best positioned to earn "shipper of choice" status, gaining loyalty, capacity and lasting operational resilience.

Staying Ahead of Logistics Trends in 2026 and Beyond

Success in 2026 will be defined by four fundamentals: intelligent technology adoption, sustainable operations, end-to-end visibility and an empowered workforce. These forces will help you shape a resilient logistics network built to adapt as conditions change.

By embracing these transportation and logistics industry trends you'll be better positioned to manage disruption, control costs and meet rising customer expectations. But you'll need some help—namely in the shape of purpose-built software that can help you solve these challenges without extra resource.

> "Companies that invest in digital transformation and supply chain visibility will be better positioned to adapt to disruption and changing customer expectations."

Aptean can help with that. Our supply chain solutions—including *transportation management systems (TMS)* and *advanced route optimization tools*—are designed for the real-world pressures and everyday challenges of logistics operations.

And now, with our unified AI platform, *Aptean AppCentral*, these tools are pre-connected with your other business software, such as *industry-specifics ERPs*, *asset maintenance* and *customer relationship management (CRM)* systems.

What's more, built-in *Aptean Intelligence* tools give you out-of-the-box, no-code AI capabilities. These simple tools connect teams, automate workflows and turn real-time data into action across transportation, warehousing and finance. Capabilities like *GenAI Query* put insight directly into the hands of your staff, enabling faster decisions without added complexity.

Staying competitive with trends in transportation and logistics means choosing technology that evolves as fast as the industry. With Aptean by your side, you're positioned not just to keep up, but to stay ahead.

Contact us today or *schedule a live demo* with one of our experts to discover how our purpose-built solutions can help you stay ahead of trends. Or get to know our products by taking a *self-guided virtual tour of our transportation management solutions here*.

About Kris Pazhayanoor

Kris brings almost 20 years of experience and deep expertise in transportation management and supply chain logistics, with a focus on building intuitive, practical solutions that simplify complex operations. He understands the daily pressures of managing freight, routes and costs—and channels that insight into user-friendly software that solves real-world problems with smart, accessible features.

About Aptean

Aptean is a global provider of purpose-built, industry-specific enterprise software that helps manufacturers and distributors run and grow their businesses. Aptean's solutions span ERP, supply chain planning, execution, and industry-focused applications – delivered on cloud and on-premise platforms. Headquartered in Alpharetta, Georgia, Aptean operates worldwide across North America, Europe, and Asia-Pacific. www.aptean.com

aptean

Salesforce Launches Agentforce for Communications to Turn Every Customer Interaction into a Growth Opportunity for Telcos

Telco-specific AI agents, built on almost three decades of industry expertise, tackle complex sales motions and improve customer retention pain points

Industry leaders like One NZ, Lumen, Personal (Telecom Argentina S.A.), and Telepass are using Agentforce to open new revenue streams and accelerate growth

The telecommunications industry is facing a revenue paradox. Telcos have spent years investing in massive 5G infrastructure and digital experience projects only to discover that they barely preserved the revenue they already had. Despite their best efforts, industry growth will have slowed to *2.9% by 2029*, with average revenue per user (ARPU) ticking *down to just $6.20*. At the same time, customer-facing teams are stuck under more pressure than ever without the tools they need, leading to customer churn *as high as 40%*. These pressures don't just exhaust teams and frustrate customers; they create invisible friction that eats away at profits and stalls growth.

Press Release from Salesforce

That's why Salesforce is launching *Agentforce for Communications*, including five new prebuilt AI agents that help teams reclaim their time and capitalize on opportunities to create new revenue streams that didn't exist before. Now every seller can reach higher deal velocity, every field technician can turn onsite visits into upsells, and every service representative is free to focus on high-value support that drives long-term loyalty, all with the help of *AI agents*. The result is happy customers who stay for the long term and human teams who can do more satisfying work that drives productivity and revenue.

> "Our AI assistant uses real-time data to handle everything from balance inquiries to plan switches, resulting in a 4x increase in engagement over traditional digital and physical channels."
>
> -Summer Collins, Chief AI & Data Director, One NZ

Organizations like One NZ and Lumen use Agentforce for Communications to unleash proactive experiences and revenue-generating innovation while saving hundreds of hours of manual labor.

"Our AI assistant uses real-time data to handle everything from balance inquiries to plan switches, resulting in a 4x increase in engagement over traditional digital and physical channels." — Summer Collins, Chief AI & Data Director, One NZ

"Agentforce is the engine reclaiming more than 300 hours of productivity for our teams every week, allowing us to pivot from managing manual complexity to focusing entirely on revenue-generating innovation." — Ryan Asdourian, EVP & Chief Marketing & Strategy Officer, Lumen Technologies

The Solution: Ready-To-Go AI Agents Built for You

Agentforce for Communications's industry-specific agents are customized specifically for the telecom industry, built on almost three decades of industry expertise. Agentforce is natively built on the trusted *Agentforce 360 Platform* and can pull live data from *CRM*, operations support systems (OSS), and business support systems (BSS) so agents can take trusted action instantly, respond in natural language, and leverage deep customer context to find immediate solutions and opportunities to drive growth.

Because these agents have deep context into the customer, their service and billing history, and your company's offerings, they can turn every customer interaction into one that meets your business' sales or service goals while working seamlessly alongside human employees. Unlike generic *AI*, these agents are built with domain-specific constraints and industry- and customer-specific knowledge, enabling you to adopt *agentic AI* faster and more efficiently.

Instead of navigating fragmented channels to fix billing errors, customers can now delight in a self-healing network where issues are resolved before they're even noticed, billing is transparent, service is efficient, and human representatives are free to go above and beyond to deliver world-class service.

For employees, *Agentforce* replaces the manual overhead of data retrieval with real-time, actionable intelligence, enabling them to focus on complex, empathetic problem-solving and win-win scenarios that drive revenue while building lasting brand loyalty. The new prebuilt agents include:

- ***Billing Resolution Agent:*** Harmonizes fragmented data from third-party systems to provide deep bill analysis and helps service representatives autonomously resolve disputes, based on specific agent guardrails. This delivers immediate financial clarity to consumers, eliminating the reactive cycle where automated solutions or human representatives lack the context to resolve issues instantly while allowing service reps to focus on high-priority escalations.

- ***Service Level Objective (SLO) Insights Agent:*** Helps teams deliver promised services like fiber uptime or repair speeds to accounts, comparing real-time network usage against specific compliance criteria. This provides account owners with a breakdown of compliance trends and root causes of failures, shifting the service model from a reactive cycle of manual troubleshooting to one of proactive, data-driven assurance.

- ***Quoting Agent:*** Helps sales representatives build complex quotes faster by instantly building an accurate quote that follows customizable business rules and logic. This helps ensure that complex bundles and the customer's right pricing are applied accurately every time, eliminating high fallout rates, where orders fail in the middle office due to technical incompatibilities, and the hassle of manually building a quote.

- ***Site Grouping Agent:*** Automates the complex task of configuring quotes and applying common offers for large deals using natural language instructions, proactively suggesting groupings based on location details, serviceability at the location, and more. This helps sales reps create multisite quotes faster and more accurately, instead of spending hours manually sorting through spreadsheets.

- ***Guided Selling Agent:*** Uncovers potential revenue opportunities for field service technicians when they visit customers by instantly generating technically valid upsell and cross-sell quotes. This allows field technicians to suggest personalized recommendations immediately while onsite, driving revenue in a high-touch moment while improving customer satisfaction.

- ***Salesforce Perspective:*** "With Agentforce for Communications, we're helping telecom companies work smarter by connecting every part of their business, from sales to customer service to field operations, with AI agents that work 24/7 alongside human teams. Whether it's resolving billing disputes, managing subscriptions, or accelerating complex B2B quotes, we're enabling telecom companies to compete in the AI era by improving efficiency, driving growth, and freeing teams to focus on what matters most." — David Fan, SVP & GM, Communications, Salesforce

The Outcome: Every Customer Interaction Is Now a Growth Opportunity

With out-of-the-box AI agents built for the telecom industry, Agentforce for Communications equips sales and service teams with real-time intelligence to resolve issues faster, reduce churn, and act on upsell opportunities more effectively. By combining digital labor with actionable insights, telcos can capture growth, drive revenue, and turn every customer interaction into measurable business impact.

Customer Perspectives

- "Updating mobile plans used to be a complex, manual, and time-consuming process for both our teams and customers. By leveraging Agentforce and Data 360, we were able to transform the process into a seamless, agentic experience in just five weeks. Our AI assistant uses real-time data to handle everything from balance inquiries to plan switches, resulting in a 4x increase in engagement over traditional digital and physical channels. This agentic shift has enabled us to deliver personalized, always-on service at a scale that wasn't possible before." — Summer Collins, Chief AI & Data Director, One NZ

- "At Personal, we leverage Agentforce and AI to scale expertise across our field operations, guide technicians in real time, and proactively detect and resolve service issues before they escalate — targeting a 20%–30% reduction in support calls while driving greater efficiency and a seamless customer experience." — Pablo Silva, Director, Customer Fulfillment, Personal (a Telecom Argentina company)

- "Our transformation from a legacy telco to a modern technology company required us to dismantle decades of technical debt and a 'Frankenstein' infrastructure. By building our agentic enterprise on Salesforce, we have moved beyond simple efficiency to radical automation, saving $5.6 million in our first year alone. Agentforce is the engine reclaiming more than 300 hours of productivity for our teams every week, allowing us to pivot from managing manual complexity to focusing entirely on revenue-generating innovation." — Ryan Asdourian, EVP & Chief Marketing & Strategy Officer, Lumen Technologies

- "With demand for Telepass services growing at 10% annually, we're reimagining customer engagement using AI. Getting started with Agentforce was easy; today, our AI agents autonomously resolve 87% of our customers' frequently asked questions, while reducing average call handle time by 50%. Now, our teams can focus on complex customer needs and deliver faster, higher-quality service across the board." — Marco Gaeta, Chief Information Technology Officer, Telepass

Chelsea Football Club selects IFS as Principal Partner

Club will leverage IFS AI technology to enhance performance on and off the pitch

IFS, the leading provider of Industrial AI software, today announces a multi-year global partnership with Chelsea Football Club. As part of this commitment, IFS will be elevated to Principal Partner with immediate effect, featuring on Chelsea's front of shirt for the remainder of the 25/26 season — marking the beginning of a long-term collaboration that places advanced AI at the heart of football performance, operational excellence and fan engagement.

IFS, the world's leading provider of Industrial AI software, enables organizations to deliver tangible results with AI by solving complex, real-world operational problems. The partnership will see IFS bring its software and market-leading AI agents to Chelsea to drive precision across the club's operations, enhancing performance in almost every aspect of the club's work.

This partnership positions Chelsea at the forefront of football's technological evolution. By harnessing the power of IFS AI to connect people, assets and intelligence in real time, the club is sharpening its competitive edge on the pitch while elevating the experience for millions of fans worldwide.

For Chelsea, this agreement signals an intent to lead from the front — not only on the pitch, but in how elite clubs are built and operated. By embedding advanced AI into its foundations, the club is reinforcing its long-term ambition to set the benchmark for performance and innovation in global sport.

"We are incredibly proud to partner with IFS and leverage their leading edge AI software to help propel the club to even greater success," said Jason Gannon, President of Chelsea FC. "This partnership is a statement of intent to keep leading in this field, harnessing the opportunities advanced technology brings and unlocking the power of AI to improve everything we do on and off the pitch."

Mark Moffat, Chief Executive Officer of IFS, said: "In sport as in industry, the margins are small, the stakes are high, and the right decision at the right moment is everything. That's what IFS Industrial AI delivers for the industries that power the global economy. Chelsea FC holds itself to that same uncompromising standard, and that shared ambition is exactly why we're proud to be their Principal Partner."

Learn more about the partnership *here.*

About IFS

IFS is the world's leading provider of Industrial AI for hardcore businesses that service, power and protect our planet. Our technology enables businesses that manufacture goods, maintain complex assets, and manage service-focused operations to unlock the transformative power of Industrial AI™ — enhancing productivity, efficiency, and sustainability in the industries that matter most.

IFS.ai is fully composable, designed for ultimate flexibility and adaptability to each customer's specific requirements and business evolution. By leveraging AI, machine learning, real-time data and analytics, IFS empowers its customers to make informed strategic decisions and excel at their Moment of Service™.

The scale of that impact is already embedded in the infrastructure of daily life. Today, $2.4 trillion in critical assets are managed by customers running IFS.ai. Every year, 800 million airline passengers fly on aircraft maintained using our platform, while 2 billion people rely on elevators and walkways we service. 200 billion packages are produced and distributed annually by manufacturers running IFS.ai, and 250 million jobs are scheduled each year through our technology. For IFS, this is not a market opportunity; it is the responsibility that comes with being the world's leading provider of Industrial AI.

IFS was founded in 1983 by five university friends who pitched a tent outside our first customer's site to ensure they would be available 24/7 and the needs of the customer would always come first. Since then, IFS has grown into a global leader with over 7,000 employees in 80 countries. Driven by those foundational values of agility, customer-centricity, and trust, IFS is recognised worldwide for delivering value and supporting strategic transformations. We are the most recommended supplier in our sector. Visit ifs.com to learn why.

About Chelsea Football Club

Chelsea Football Club is one of the top football clubs globally and our men's team are reigning world champions, having won the four-yearly FIFA Club World Cup in 2025.

We had previously won the 2021 edition of the competition, held in 2022 due to the pandemic and that success followed winning the UEFA Champions League for a second time. Our women's team, Chelsea Women, are also multiple trophy winners.

Founded in 1905, Chelsea is London's most central football club, based at the iconic 40,000-capacity Stamford Bridge stadium. Nicknamed the Blues, the club lifted the Champions League for the first time in 2012 and domestically has won the Premier League five times, the FA Cup eight times, the Football League Cup five times and the Football League Championship once, in 1955.

The 2021 Champions League and UEFA Super Cup triumphs ensured Chelsea became the first club to win four major UEFA club competitions twice, following our earlier successes in those two competitions as well as the Europa League and Cup Winners' Cup. Having added the UEFA Conference League in 2025, the Blues are the only club to have won all the current UEFA club competitions.

The Chelsea Women's team have enjoyed a huge amount of success and in 2025 won the FA Women's Super League for a sixth consecutive year and the eighth time overall. The Women's FA Cup has been won on six occasions. We have also captured the FA Women's League Cup three times as well as reaching the UEFA Women's Champions League final in 2021. In two seasons, 2020/21 and 2024/25, a domestic treble of trophies was secured.

In addition to possessing some of the world's most recognisable players, Chelsea has also invested in our future with a state-of-the-art Academy and training centre in Cobham, Surrey. Since the Academy building's opening in 2008, the club has won seven FA Youth Cups, back-to-back UEFA Youth League titles in 2015 and 2016, and the U23 and U18 Premier League national championships most recently in 2019/20 and 2017/18 respectively.

The Chelsea Foundation boasts one of the most extensive community initiatives in sport, helping to improve the lives of children and young people all over the world.

Five Major Shifts Shaping 2026 Manufacturing Tech Priorities

Rootstock survey comparison signals rising workforce pressures, evolving AI focus, and shifting ERP expectations

A comparison of Rootstock Software's 2024 and *2026 State of Manufacturing Technology Survey* results reveal five significant shifts in how manufacturers are prioritizing technology investment. While digital initiatives continue to advance, the analysis shows new trends in the types of AI being deployed, the workforce barriers organizations face, the outcomes expected from ERP solutions, and the cost and planning pressures influencing tech decisions.

"Technology by itself cannot solve today's complex manufacturing challenges," said *Ohad Idan*, Vice President of Product at *Rootstock Software*. "One of the recurring issues we see among product-based companies is that they're moving to new technology before clearly defining their desired outcomes. What's needed is alignment with core business processes and well-defined metrics for success. When this foundation is in place, advanced systems can drive measurable and lasting impact."

The five shifts that emerged from this *manufacturing tech survey* comparison include:

1. Workforce pressure intensified. When asked about the biggest barriers to digital transformation, lack of the right talent rose from 25% in 2024 to 33% in 2026 (+8 points). Manufacturers have long faced skilled labor shortages, and the latest results suggest that this is becoming a more pronounced constraint on modernization efforts.

2. AI investment shifted sharply toward supply chain execution. When asked where manufacturers are deploying or planning additional AI investment, supply chain management and planning surged from 16% in 2024 to 35% in 2026 (+19 points)—the largest application-level increase in the survey. As trade conditions and supply chain disruptions create volatility, AI investment is moving decisively into the operational core of the business to improve visibility and responsiveness.

3. Predictive AI adoption accelerated. When asked what types of AI are being deployed, predictive AI adoption rose from 36% to 48% (+12 points). Compared to 2024, when generative AI drew significant attention, 2026 data indicates a growing emphasis on tools that support forecasting, demand planning, and forward-looking operational decisions.

4. ERP expectations expanded to workforce retention. When asked where cloud ERP is expected to deliver the greatest positive outcomes, employee retention increased from 18% in 2024 to 30% in 2026 (+12 points). At the same time, 45% expect ERP to improve staff productivity, signaling that ERP is increasingly viewed as a workforce stabilization tool—not just an operational platform.

5. Tariffs and trade policy uncertainty have increased operational complexity. When asked how these factors affect operations, manufacturers reported higher raw material costs (39%), planned price increases for customers (37%), and increased difficulty in planning and cost forecasting (29%). Although this question was introduced in 2026, the findings align with the broader rise in predictive AI adoption, as these capabilities will help manufacturers manage cost volatility, improve planning accuracy, and make informed pricing decisions.

While many tech categories show progress and advancement, the comparison also reveals areas for improvement. In the AI maturity comparison, the percentage of manufacturers who consider themselves "far ahead" of their peers remained flat at 5% between 2024 and 2026.

"Overall confidence in AI adoption has risen, but the fact that so few manufacturers consider themselves true AI leaders tells us there is still significant room to unlock value," said Idan. "The next phase of AI isn't just about adoption — it's about driving measurable outcomes and ROI."

To review the full findings, download the complete report here: *https://clouderp.rootstock.com/2026-state-of-manufacturing-technology-survey*

Methodology

The 2026 State of Manufacturing Technology Survey was conducted by *Researchscape* and commissioned by Rootstock Software. The study surveyed 520 professionals leading digital transformation initiatives at mid- to large-sized manufacturers across North America, Europe, and Asia.

About Rootstock

Rootstock Software provides the leading ERP for product companies, empowering manufacturers, wholesalers, and distributors to turbocharge their operations. Natively built on the Salesforce Platform, Rootstock is a modern, future-proof ERP with a fresh user experience. Users appreciate Rootstock's focus on customer success and its AI capabilities that offer a human-first approach. IT teams value Rootstock's platform as it minimizes the need to coordinate complex customizations and third-party integrations. All of these factors add up to delighted customers. As Rootstock continues to grow, stay tuned to hear about its new customers, career opportunities, and LinkedIn posts.

Aptean Launches the Next Generation of Fashion & Apparel Technology - AI that Puts Brands Fully in Control

Most apparel solutions automate tasks; Aptean Fashion & Apparel accelerates decisions with agentic AI in seconds.

Aptean announced the launch of Aptean Fashion & Apparel, its most powerful AI operations solution built for the unique demands of the fashion and apparel industry. The solution embeds apparel-specific intelligence at the core of every operation, interpreting styles, automating multi-step workflows, and using AI agents to make decisions in real-time. With Aptean, brands and wholesalers can move from concept to customer faster and improve margin with greater confidence.

Unlike traditional apparel ERPs built on aging frameworks with disconnected modules, Aptean Fashion & Apparel runs on Microsoft Dynamics 365 Business Central and AppCentral, Aptean's agentic AI platform. Together, they give brands a modern, scalable, cloud-native foundation with AI agents that move quickly across applications and data, improving operational precision and delivering intelligence that legacy systems and generic ERPs simply cannot match.

Executive Perspective

"Fashion and apparel brands operate in one of the most complex product environments," said Alain Tessier, Director of Product Management at Aptean. "A single style can quickly become hundreds of SKUs, while supply chain volatility and shifting tariffs create constant cost pressure. With short selling windows and long lead times, teams need systems that help them make critical decisions earlier and with greater confidence. Aptean Fashion & Apparel delivers that intelligence directly within daily workflows."

Aptean Fashion & Apparel's Stand-Out Capabilities Include

- Industry-Specific AI Agents: Ask questions in plain language and get real-time answers with apparel-specific agents compressing multi-step workflows from days to seconds.
- AI-Driven Season Management: Make smarter margin-saving decisions with an AI agent that continuously monitors style performance and flags underperformers early.
- Smarter Substitutions: Protect revenue when styles are unavailable with AI-recommended alternatives that help wholesalers fulfill orders confidently and avoid missed sales.
- Streamlined Style Management: Centralize every style in a single master with key attributes enriched by AI-generated descriptions and tags for instant visibility.
- Unified Intelligent Ecosystem: Connect design, warehouse, and finance through AppCentral, unifying ERP, PLM, shipping automation, and more, into a seamlessly integrated suite.
- Trusted Financial Foundation: Leverage Microsoft Dynamics 365 Business Central's proven financial module to give finance teams a reliable foundation for accurate, real-time financial data.

Why it Matters to Fashion and Apparel Brands.

Fashion and apparel brands face constant pressure to react to shifting demand, shorten product cycles, and protect margins across every channel. To stay ahead, they need faster, more confident decisions - not just task automation - that keep design, sourcing, production, and delivery aligned in real time.

Most apparel ERPs and operations software automate repetitive tasks. Aptean Fashion & Apparel goes further, automating decisions and unifying workflows from design to delivery, giving teams real-time visibility across styles, colors, and dimensions. AI agents surface insights and handle complex tasks, strengthening control and accelerating execution. With a modern architecture, brands gain faster time to market, stronger margins, and higher operational efficiency that traditional systems simply cannot deliver.

CEO Perspective – TVN Reddy

"With more than 40 years of apparel expertise and the trust of over 800 customers, we understand the operational realities brands face," said TVN Reddy, CEO of Aptean. "By combining our Fashion & Apparel industry experience with the AppCentral platform and a robust ERP foundation, we are helping brands accelerate time to market, streamline operations, and protect margins. AppCentral applies AI across the entire apparel data landscape - from styles and attributes to orders and inventory - enabling intelligence and automation at every step, not just in isolated use cases. This delivers meaningful efficiencies without heavy customization and enables brands to scale smarter, respond faster, and operate with the resilience today's market demands."

Learn More

To learn how Aptean Fashion & Apparel can transform your business with AI-driven insights and intelligent automation, visit: *Fashion and Apparel Solutions*

Attending Sourcing by Informa in Las Vegas

Join Aptean on February 17–18, 2026, for our sessions on how AI agents can elevate fashion operations and accelerate decision-making.

Microsoft and Dynamics 365 Business Central are trademarks of the Microsoft group of companies. All other trademarks are the property of their respective owners.

About Aptean

Aptean is a global provider of purpose-built, industry-specific enterprise software that helps manufacturers and distributors run and grow their businesses. Aptean's solutions span ERP, supply chain planning, execution, and industry-focused applications – delivered on cloud and on-premise platforms. Headquartered in Alpharetta, Georgia, Aptean operates worldwide across North America, Europe, and Asia-Pacific. www.aptean.com

Cox Automotive Improves Sales Experience for Toyota and Lexus Dealers with SmartPath/ MONOGRAM Deal Integration

Cox Automotive's VinSolutions, the leading CRM in the automotive industry, announced a new integration with Toyota Motor North America, Inc.

Cox Automotive's VinSolutions, specifically, the Vin Desking features of CRM and Deal Central, now integrate with Toyota SmartPath/Lexus MONOGRAM retailing, enabling the opportunity for a seamless consumer experience from online to instore, and offers a highly integrated consumer–management workflow designed to support end–to–end experiences.

Sales Managers can now seamlessly push deals from the SmartPath/MONOGRAM Mobile Sales Tablet and Management Console into VinSolutions for Desking capability with the click of a button. This enhanced workflow reduces or eliminates manual re–keying- saving users up to 15 minutes per deal (Source: Toyota SmartPath System Data: Time Test December 2025-January 2026) -while improving data accuracy and ensuring stronger alignment with Toyota and Lexus' deal structure. This integration enables a faster, more consistent, and more efficient deal–processing experience.

"When a SmartPath customer submits a deal, having that information show up directly with the lead makes a real difference for our team," said Gabe Ariyajasingam, Sales Manager, Lexus Akron Canton. "We spend less time confirming and re-keying details and more time engaging the customer. It simplifies the handoff and provides a better customer experience."

VinSolutions' desking features are part of a powerful ecosystem of retail solutions from Cox Automotive. They help identify ready-to-buy customers and help close more deals, powered by exclusive buyer insights. Dealers can maximize profits with advanced CRM tools, AI-driven insights, automated marketing, and desking software to ensure seamless customer engagement and dealership success.

For more information visit *https://www.vinsolutions.com.*

About Cox Automotive

Cox Automotive is the world's largest automotive services and technology provider. Fueled by the largest breadth of first-party data fed by 2.3 billion online interactions a year, Cox Automotive tailors leading solutions for car shoppers, auto manufacturers, dealers, lenders and fleets. The company has 29,000+ employees on five continents and a portfolio of industry-leading brands that include Autotrader®, Kelley Blue Book®, Manheim®, vAuto®, Dealertrack®, NextGear Capital™, CentralDispatch® and Cox Fleet®. Cox Automotive is a subsidiary of Cox Enterprises Inc., a privately owned, Atlanta-based company with $23 billion in annual revenue. Visit coxautoinc.com or connect via @CoxAutomotive on X, CoxAutoInc on Facebook or Cox-Automotive-Inc on LinkedIn.

Finnair's Finnish hospitality shines with Agentforce's 24/7 support

80% of customer service questions are now resolved by AI agents.

80%
customer enquiry resolve rate

25%
reduction in employee onboarding time

FINNAIR

Finnair, Finland's flagship airline, has flown for over a century. With a 90% on-time rate, it connects 12 million passengers a year to 1,000 destinations via the Oneworld alliance.

The Challenge for Finnair

Finnair strives to make every trip effortless, even when things don't go as planned.

Finnair has prioritised their customers' safety and wellbeing since 1923. Inspired by Finland's reputation as the world's happiest country, the airline brings that same sense of Finnish spirit, joy and comfort to every flight by paying special attention to detail, efficiency, sustainability and high-touch service. "Sharing Finnish happiness means keeping our promises and ensuring every journey is better — today and tomorrow," said Antti Kleemola, Finnair's Chief Digital Officer.

Travel is full of unexpected challenges, which is why Finnair invests in multilingual reps fluent in 13 languages, each highly trained in problem solving and conflict resolution. The one-year onboarding process reflects their commitment to high-touch service, preparing reps to handle everything from routine flight details to complex issues like tracking lost baggage across multi-stop itineraries. Assisting customers meant navigating hundreds of internal knowledge sources, airport-specific information and international travel guidelines across multiple systems — a time-consuming and labour-intensive process.

To ease the load on reps, Finnair had previously introduced a chatbot to handle common questions, like "Have I got lounge access with a Finnair Plus Gold Card?" While useful for simple, clearly worded queries, the bot struggled with anything more conversational or nuanced. For example, if a customer followed up by asking whether children could join them in the lounge, the bot often failed to understand. It worked well if you asked the exact right question — but anything more specific or complex usually led to confusion. As a result, the experience wasn't always seamless and many customers ended up calling in or searching for answers themselves.

Delivering Finnish hospitality is about creating moments of warmth and ease. To achieve this, Finnair needed more than a chatbot. They needed a solution that could seamlessly connect data and turn it into personalised, proactive service for even the most challenging travel scenarios.

> "Sharing Finnish happiness means keeping our promises and ensuring every journey is better — today and tomorrow."
>
> -Antti Kleemola
> Chief Digital Officer,
> Finnair

How Salesforce Helps Finnair

From missed flights to customs conundrums, Agentforce provides instant, accurate answers.

The key to providing fast, consistently personalised service across every scenario is *Agentforce*, AI agents powered by the *Agentforce 360 Platform*. Finnair already has the data to tailor their service for each customer, but they needed a way to bring those insights together and act on them. Agentforce does just that. By combining information from Finnair's website, rich customer insights in *Service Cloud*, booking and booking data from Amadeus — an external system used to manage travel bookings across the global tourism industry — and Finnair Plus loyalty details via *Data 360* Agentforce acts on unified customer and travel data to serve passengers in a warm, conversational tone.

For instance, if a customer keeps in touch to Finnair regarding their Finnair Plus loyalty membership, Agentforce provides specific information like the number of points they have accumulated, when they'll qualify for the next tier status or details on available airport travel perks.

If a case requires further assistance, Agentforce seamlessly escalates to one of Finnair's skilled reps with all the necessary context. For example, if a customer asks about travelling with a pet, Agentforce provides the rep with key details instantly — flight information from Amadeus, Finnair's pet travel policies and relevant regulations for travelling with animals, including specific rules for flights from Paris — eliminating the need for manual searches and ensuring faster, more accurate assistance.

"Our human agents rely entirely on Salesforce, making Agentforce a natural next step in enhancing customer service with Service Cloud," Kleemola said.

In addition to improving the customer experience, Agentforce also significantly shortens the onboarding process for new reps

by providing the information they need instantly. New hires no longer have to spend a year learning how to shuffle between multiple systems to find answers, helping Finnair decrease onboarding time by 25% while still training up world-class support.

> "Our human agents rely entirely on Salesforce, making AI agents a natural next step in enhancing customer service with Salesforce Service Cloud."
>
> -Antti Kleemola
> Chief Digital Officer,
> Finnair

Agentforce delivers real-time, personalised support to Finnair customers, turning disruptions into seamless experiences.

Finnair has long been proactive in keeping in touch to customers when plans change. With Agentforce, they're even faster. Agentforce is integrated with Service Cloud's customer data and automation tools, which enables it to continuously monitor flights, keep customers informed and suggest alternative itineraries when needed — reducing stress for travellers and improving efficiency for reps. And soon, Agentforce will be able to take action on bookings. For example, when a customer requests a refund, Agentforce will automatically verify the request, check the ticket status and process the refund, streamlining a once-manual process.

These advancements are paving the way for an even more anticipatory and personalised approach to customer care, like using Agentforce's voice features to provide real-time updates and rebooking options for customers who prefer a phone call.

"Whether it's a sudden snowstorm or an unexpected airport technical issue, customers won't have to wonder what to do next," Kleemola said.

By blending the warmth of Finnish hospitality with the power of digital innovation, Agentforce elevates Finnair's support — ensuring every journey is effortless, every disruption is handled with care and every customer is supported from start to finish.

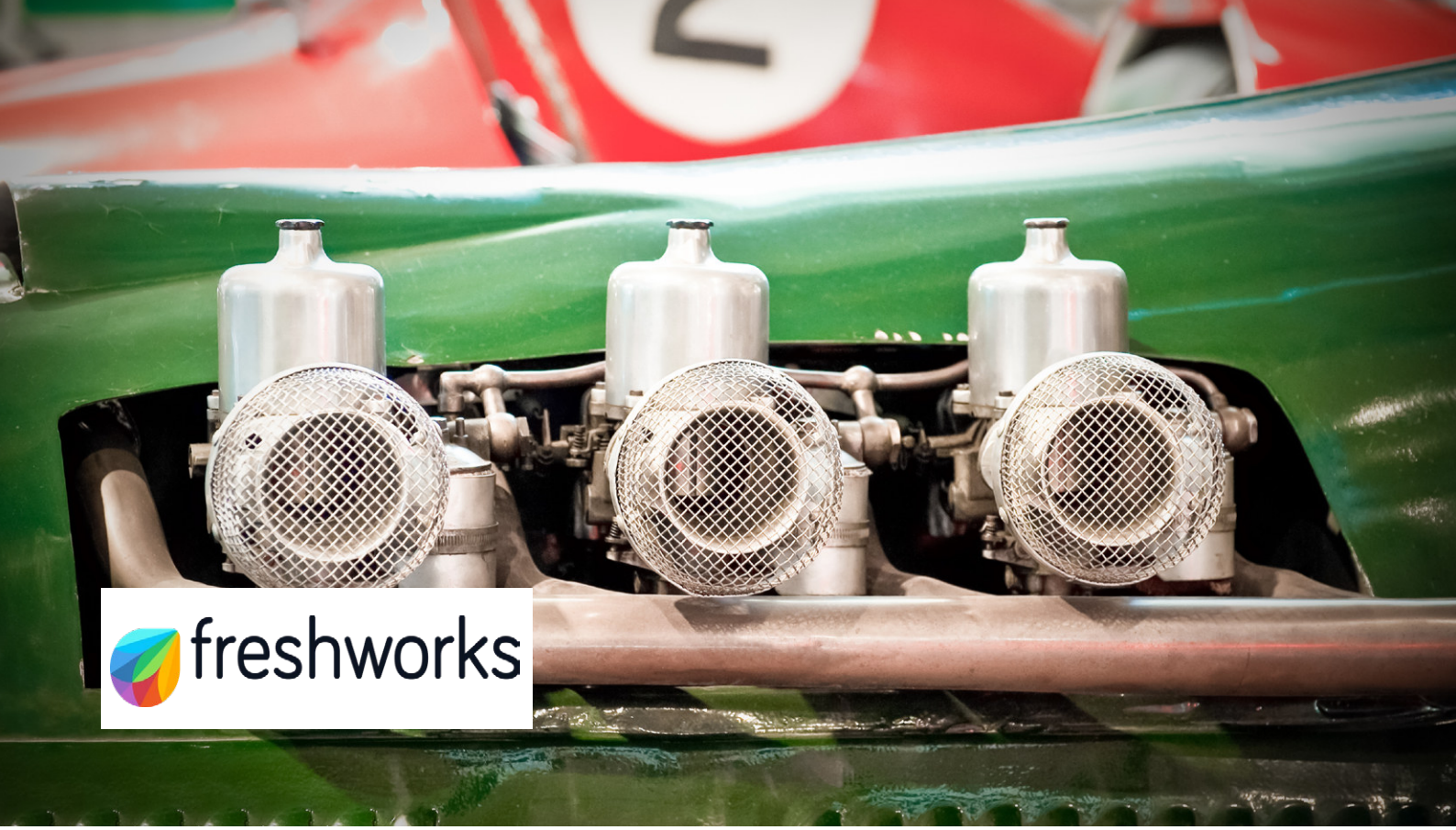
> "Whether it's a sudden snowstorm or an airport closure due to a strike, customers won't have to wonder what to do next."
>
> -Antti Kleemola
> Chief Digital Officer,
> Finnair

The Salesforce Difference

For Finnair, Salesforce offered a deeply unified, open platform that seamlessly integrates with their existing systems and unlocks powerful AI-driven insights. The Agentforce 360 Platform brings together data from essential systems like Service Cloud, Amadeus and eventually Snowflake into Data 360. This created a single, searchable data store for customer details and articles on finnair.com documenting Finnair's best practices and expertise to provide exceptional experiences - on the good days and the bad. With everything in one place, Finnair's reps have instant access to critical information, enabling faster and more accurate service.

Agentforce is a natural extension of what they've already built with Salesforce, building on their success with Service Cloud. AI agents turn Finnair's data into instant, seamless support worldwide by helping them proactively take action to get ahead of issues for their customers. "Agentforce is going to be the heart of customer service; I see it as revolutionary," said Taina Kunelius, Finnair's Head of Before and After Journey CX.

By automating routine tasks and anticipating customer needs, Agentforce helps Finnair maintain its signature high-touch service in every situation and ensure that every journey is as smooth, stress-free and comforting as Finnish hospitality itself.



McLaren Mastercard Formula 1 Team enhances performance with enterprise-grade ITSM

Freshservice helps the racing team deliver reliable technology operations across the team from pit lane to mission control

24	~2,000	300+
Race locations supported annually with consistent IT operations	Service requests managed per quarter across global operations	Employee lifecycle tickets processed per quarter to support team growth

Business challenge

- McLaren's IT team completely rebuilds a technology infrastructure in a new location every week during racing season with limited staff
- Race-day performance depends on flawless operation of 300 car sensors streaming real-time data to mission-control analysts
- Growing championship-contending team needed scalable ITSM without adding complexity to lean IT operations

Business outcome

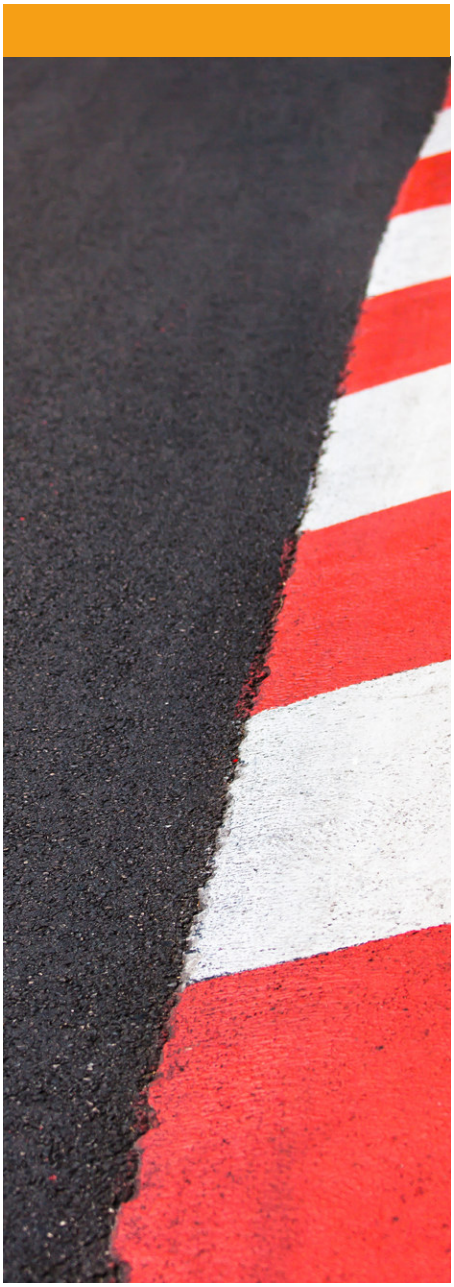
- Freshservice enables systematic race-weekend operational checks, ensuring technology readiness before every event
- Unified platform provides cross-functional visibility for aerodynamics, engineering, and racing operations teams

> “Freshworks is super focused on delivering uncomplicated IT services into its organization. It has to be a frictionless exercise, and people need to enjoy consuming IT services.”
>
> -Dan Keyworth
> Director,
> Business Technology

When the McLaren Mastercard Formula 1 team competes at 24 races across the globe each season, every millisecond counts—on and off the track. As the team celebrates back-to-back Constructors’ Championships in 2024 and 2025, the IT organization plays a critical role in ensuring flawless execution from the pit lane to mission control.

Just two trackside IT personnel support race-day operations. With a lean team managing global technology infrastructure, McLaren needed an ITSM platform that could deliver reliability without complexity. They deployed Freshservice to create consistent, traceable workflows for critical race-weekend operational checks and employee lifecycle management.

“IT is becoming more of a strategic player in the landscape of Formula 1,” says Dan Keyworth, director of business technology at McLaren Racing. “Technology is just going to become an even bigger strength for all the teams as well.”



The company

The McLaren Mastercard Formula 1 team, part of McLaren Racing founded in 1963, competes in the FIA Formula 1 World Championship with drivers Lando Norris and Oscar Piastri. The team won consecutive Constructors’ Championships in 2024 and 2025, marking their return to the top of the sport. The team employs more than 1,000 people.

The challenge

Formula 1 operates at the extreme edge of performance, which means the McLaren team’s IT team faces a unique challenge: delivering enterprise-grade technology services for a globally distributed operation that rebuilds itself in a new location every week during the racing season.

“When we go to every race, we get there about a week in advance, and we’re given this empty shell and have to build a garage from scratch,” explains Keyworth. “We’ve got to run three and a half kilometers of cabling, we’ve got to set up all of the things for the engineers. The two cars come into the garage, but then the IT infrastructure in the garage is actually not very intelligent until we plug in the tech. That’s an incredible moment because as soon as the technology lights up, the whole garage comes to life.”

The team manages six complete sets of equipment rotating through 24 race locations annually. Every monitor, data link, and communication system must perform flawlessly. With 300 sensors streaming real-time data from each race car and more than 30 people in mission control analyzing every decision, technology uptime isn’t optional, it’s existential.

Operating with a lean IT team, McLaren needed a platform that could:

- Provide visibility and accountability for recurring race-weekend system checks
- Support employee onboarding and offboarding workflows as the team scales
- Deliver consistency without requiring extensive IT resources to maintain

"There's a huge reliance on us, and I think what we've woken up to is that technology is always going to be this thing in the organization that everyone's going to rely on in the future to remain competitive," Keyworth says.

The solution

The McLaren Mastercard Formula 1 team selected Freshservice for its intuitive interface and focus on delivering uncomplicated IT services, crucial for a team where every team member's focus must remain on performance.

> IT is becoming more of a strategic player in the landscape of Formula 1.
>
> -Dan Keyworth
> Director,
> Business Technology

"Freshworks, and Freshservice in particular, is super focused on delivering uncomplicated IT services," says Keyworth. "My view is that it always has to be a frictionless exercise and that people need to enjoy consuming IT services and also that it just works." The team implemented Freshservice to orchestrate mission-critical workflows, including:

Race-weekend operational checks: IT raises recurring tickets before each event to verify all systems, from monitors and microphones in the control room to data links and communication equipment. This creates a documented trail of readiness that the team can rely on when the pressure is highest.

Employee lifecycle management: The platform supports onboarding and offboarding workflows, currently semiautomated with plans to integrate fully with Workday. This provides a foundation for scaling IT service delivery as the team grows.

Freshservice provides the stability and scalability McLaren needs as they pursue championships on the grid.

Impact

While the team's Freshservice adoption journey continues, the platform has established a foundation for operational confidence that matters in a sport decided by milliseconds.

The team now has:

Systematic race-weekend readiness: Documented operational checks ensure nothing is left to chance before each event

Cross-functional visibility: Teams across aerodynamics, engineering, and operations can track requests and coordinate responses

Scalable service delivery: A platform that can grow with the team's ambitions without requiring proportional IT staff increases

"I understand the complexities that go behind the sport, not just two cars on track. There is a huge amount of people that are pulling in the same direction," says Keyworth.

As McLaren continues to mature their ITSM practices, Freshservice provides a reliable foundation for a team where performance is everything.

Vilaseca Optimizes Meat Processing Traceability and Inventory Management with Odoo

Every great family business begins with a bold decision. In Vilaseca's case, that first step was taken in the 1930s, when Ramón Vilaseca Forcada traveled from Spain and crossed the Atlantic to start a new life in Colombia. Originally from Vic, a region deeply rooted in charcuterie tradition, he arrived with more than just suitcases: he brought recipes, techniques, and knowledge passed down through generations; elements that would later give rise to the formal launch of the charcuterie project in 1944.

What began as a family craft focused on traditional products such as salchichón made using artisanal methods quickly found its place in the Colombian market: first among European communities and, over time, with a broader audience. From the outset, quality and closeness defined the path of a company that would grow without losing its identity.

Following the founder's passing in 1972, the second generation (led by Martín Vilaseca Torres and Ligia Herreño) drove a new phase of growth: national expansion, portfolio diversification, the import of products such as Spanish jamón serrano, and the development of cured products that were largely unknown in Colombia at the time. Each step reinforced the idea of building long-term relationships with customers in the gastronomic and retail sectors.

Today, under the leadership of the third generation, Vilaseca is a Colombian company with more than 80 years of history, nearly 175 employees, operations based in Bogotá, and distribution to the country's main cities. Specialized in high-end charcuterie meat products, the company's sustained growth made it clear that it needed a tool capable of supporting that evolution without breaking the culture that defines it.

> "We want anyone who works with Vilaseca to feel that we are part of their company. That we understand their business and truly get involved in the solutions."
>
> -Martín Vilaseca
> General Manager of Vilaseca

It was at that point that Odoo became a strategic ally. More than a technological implementation, adopting Odoo represented a natural step in the company's history: unifying operations, gaining real-time traceability, and sustaining accelerated growth without losing control or the family essence that has guided Vilaseca since its origins.

The challenges of an increasingly complex operation

Before implementing Odoo, Vilaseca operated with an accounting software that adequately complied with local regulations and financial reporting. However, as the company grew, operational complexity began to exceed the system's capabilities.

The main challenge lay in controlling costs, inventories, and production processes. Key operational information (such as waste, pH levels in curing processes, raw material consumption, and batch traceability) was managed outside the system, mainly in Excel. This made it difficult to access real-time information and limited decision-making during the process, not just at the end.

In addition, the company used external tools for reports and dashboards that were not integrated with one another. Information was fragmented, and each area "spoke a different language": accounting, production, and purchasing worked with disconnected data, generating internal friction and loss of efficiency.

> "The challenge was to make the operation efficient and have real-time information. We needed data during the process, not just at the end."
>
> -Martín Vilaseca
> General Manager of Vilaseca

A turning point on the technological journey

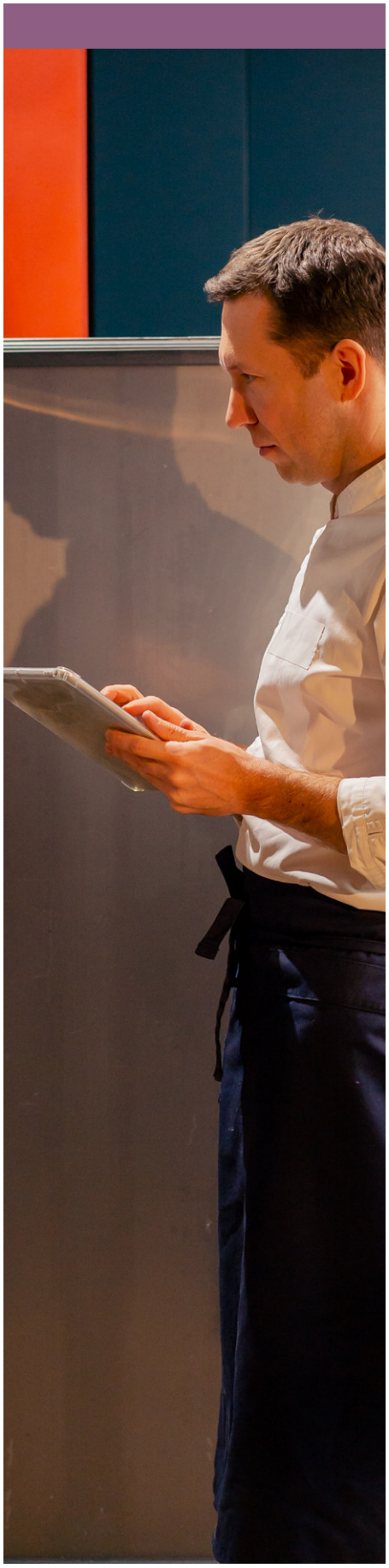
Vilaseca's search for an ERP was not new. For more than 20 years, the company evaluated different solutions, but encountered the same issue each time: either the system did not fit its operational reality, or the costs were disproportionate to the size and needs of the business.

The first contact with Odoo came independently, by exploring the CRM and downloading test databases. At that time, however, the Colombian localization was not yet mature, and the project was put on hold. Interest was later rekindled after a conversation with a family member in Belgium who worked directly with Odoo and shared a deeper view of its evolution, especially regarding localizations and the partner ecosystem.

From there, Martín Vilaseca resumed his research, consumed tutorials, ran hands-on tests, and identified a key differentiator: the ability to use and test the system firsthand, without relying exclusively on commercial interpretations. This practical approach proved decisive in moving forward and contacting a specialized partner.

From decision to operational transformation

When Vilaseca decided to modernize its operation, it was not just looking for a system: it was looking for a partner that understood the company's history and family culture. After evaluating several options, the meeting point between strategic need and concrete execution came with Pragmatic, a local partner with 25 years of experience and positioned as the country's #1 Gold Partner.



Pragmatic brought not only technical expertise, but also a practical and close approach. Its knowledge of Colombian regulations, combined with agile methodologies and best practices based on experience, enabled Vilaseca to achieve an efficient and secure rollout, aligning technology, processes, and organizational culture.

Implementation with Pragmatic began in the second half of 2024, and go-live took place on March 31, 2025, in line with the planned schedule. The project included the Sales, Purchase, Accounting, Inventory, and Manufacturing modules, prioritizing those critical for a food company: lot management, expiration dates, traceability, and strict inventory control.

- During the process, the company made strategic decisions. Some modules, such as Employees and Payroll, were initially implemented but later put on hold until the specific required reports were available. This flexibility made it possible to focus efforts on ensuring solid adoption aligned with the internal culture.

- One of the greatest advances was the shift from Excel-based traceability to fully integrated system traceability. Today, Vilaseca can track each batch, understand consumption in real time, and connect customer demand planning with manufacturing, something that was not previously possible.

- The improvement was not only technical. According to the team, Odoo enabled the entire organization to speak the same language. Information stopped being fragmented, and communication between departments became more fluid, reducing internal friction and improving the work environment.

> “We moved from Excel to an integrated system. Traceability control was a night-and-day change.”
>
> -Martín Vilaseca
> General Manager of Vilaseca

In terms of results, the company recorded a 28% increase in product volume, accompanied by significant productivity gains and a more collaborative work environment. Martín Vilaseca estimates that system integration contributed to an efficiency increase of nearly 30%, along with a 50% improvement in workplace climate by reducing friction and increasing information transparency.

In addition, features such as the chatter, activity logging, and document traceability strengthened a culture of accountability and follow-up. The use of management indicators and dashboards began to transform how meetings are started and decisions are made, with data visible and shared by everyone.

> “The success of the project was largely due to Vilaseca’s corporate culture, characterized by its orientation toward innovation and openness to change. The strong connection and collaboration with Pragmatic’s consulting team was a key factor in achieving highly satisfactory results.”
>
> -Mario Romero
> CEO of Pragmatic

A path of continuous evolution

Vilaseca does not view the Odoo implementation as a closed project, but rather as a foundation for future growth. The company now has a technological structure prepared to scale alongside its expansion in sales and production capacity.

In the short and medium term, plans include advancing work centers in production, barcode usage in logistics, and greater traceability in purchasing: functionalities already available in the system that will be gradually incorporated as internal culture and processes are ready to take the next step.

This growth will take place hand in hand with Pragmatic, with whom Vilaseca maintains a long-term relationship based on continuous support, system evolution, reporting improvements, and assistance with future version upgrades.

> “With Odoo and Pragmatic’s support, we have the infrastructure and flexibility to grow without losing our family essence. We can now focus on innovating, delivering quality, and continuing to be a true ally to our customers.”
>
> -Martín Vilaseca
> General Manager of Vilaseca

Vilaseca’s experience shows that an ERP can transform the way people work together. If your company faces similar challenges and is looking for a solution that combines operational control, real-time visibility, and progressive adoption, contact Odoo to become the ally that drives your next stage of growth.

About Odoo

Odoo is an open-source suite of integrated business applications actively programmed, supported, and organized by Odoo SA. Odoo is similar to many open-source projects where customized programming, support, and other services are provided by an active global community and partners network. The community is comprised of more than 1,500 active members and has contributed more than 4,500 modules to the ongoing enrichment of Odoo. The network of certified partners, established in more than 120 countries, deploys the solution locally. The software, with more than 1,500 downloads a day, is one of the most frequently installed business suites worldwide.

The role of modern MRO in performance excellence at China Airlines

With a proven implementation plan and the support of a committed vendor in IFS along with an internal team of champions, China Airlines is achieving and exceeding its business performance objectives, helping it remain agile and top of mind in today's highly competitive aviation market.

CHINA AIRLINES

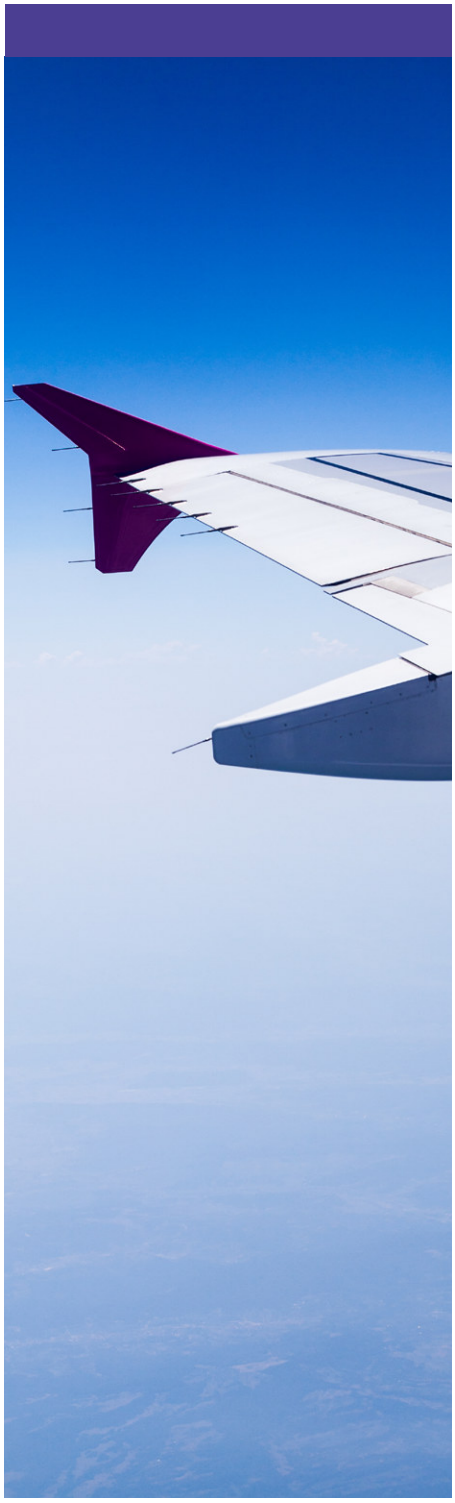
Founded in 1959, China Airlines is the largest airline in Taiwan and a SkyTeam airline alliance member since September 2011. As of 2023 the airline operates a fleet of 91 aircraft with an average age of 9.9 years, including A350-900, A330-300, A321NEO, 777-300ER, 777F, 737-800, 747-400, 747-400F (cargo), 787-900 (delivered by 2025). With its hub in Taipei, it serves 151 destinations in 29 countries. China Airlines has 10,815 employees worldwide. Subsidiaries include Mandarin Airlines and Tigerair Taiwan. Revenue in 2022 amounted to TWD 151 billion. www.china-airlines.com

Safety first—always

For China Airlines, the promise of safety is the fundamental factor in delivering the best possible customer service. As Taiwan's largest air carrier operating in the highly dynamic and competitive Asia Pacific market, strengthening China Airlines' reputation as an industry leader in this area is a business imperative. Mr. Sun Jia-Min, Senior Vice President, Engineering & Maintenance Organization, China Airlines, says, "We have integrated safety awareness into our operations, system, design, and organization to ensure that all our employees are committed to it. We continuously evaluate and monitor the training and certification of our maintenance personnel to ensure ongoing compliance with regulations."

One single solution – the value of integrated maintenance software

The airline had a network of legacy mainframe systems that often failed to deliver the critical data insights required to evolve the business and introduce new efficiencies. The systems were mostly siloed from one another and operated with various sets of processes. China Airlines had difficulties accessing and sharing timely maintenance information across the organization. "In our highly competitive marketplace, we knew that success would hinge solely on factors that could be controlled - for example, driving greater operational efficiencies," says Mr. Sun, adding that aggressive growth plans and an expanding fleet meant that retaining the status quo was no longer viable. The company integrated the entire Engineering & Maintenance Organization (EMO), strengthened configuration control and record-keeping, while minimizing in-house customizations. "In addition to generating substantial cost savings, we wanted to drive stronger visibility into our operations, both



'day of' and historical. This would not only simplify compliance with regulatory standards but would also help us better understand why things happen and how we could best minimize the risk of it happening again in the future through preventive maintenance."

A decade of collaboration

China Airlines engaged in a thorough market search to assess the solutions on offer, eventually opting for IFS Mr. Sun says, "We chose IFS as our system of record for maintaining and engineering our fleet of Boeing and Airbus airplanes, as well aircraft from our growing third-party maintenance services." IFS offers a full end-to-end suite, including functionality for maintenance program management; configuration management; engineering; planning; materials management; and line, heavy, and shop maintenance. "After a decade of using IFS, our objectives for this system are being met. IFS has allowed us to improve business efficiency in multiple areas. Engineering provides the core of our compliance efforts, ensuring that planning, execution, and materials are always working within the regulatory objectives while minimizing cost and effort". Using IFS, China Airlines has been able to provide immediate traceability for tasks, tools and parts, automatic scheduling of tasks, clear and comprehensive planning, and scope and execution support throughout the maintenance cycle. The value of an integrated, aviation-centric solution is evident throughout the business. "The integration between materials and maintenance has allowed China Airlines to have a real-time understanding of the part demands. Shortages can be identified immediately and rectified with minimal impact to maintenance and operations," says Mr. Sun.

Moment of Service™

"Expanding third-party MRO services for global customers like United Airlines, FedEx, Korean Air and Japan Airlines is of significant benefit to the growth areas of our business," says Mr. Sun. IFS also extends into such specialty areas as materials management. For

instance, China Airlines currently uses a warehousing system called ASAR, or Automatic Storage Automatic Retrieval. ASAR is quite robust, capable of retrieving information on more than 120,000 parts and materials within just 50 seconds of inquiry. "To capitalize on this power, we integrated the system with IFS," Mr. Sun explains. "This enables a completely seamless 'Just in Time' supply model, helping us cost-effectively execute timely parts requests and fulfillment in line with increasingly competitive serviceability targets.

> "IFS has allowed us to improve business efficiency while exceeding safety and reliability standards. China Airlines values their partnership with IFS and looks forward to another decade of a productive relationship."
>
> -Mr. Shih Ching-Kai, Assistant Vice President, Maintenance Division, China Airlines

Optimization and efficiency key gains

Optimizing the way line and A checks are performed, coupled with the significant reduction in layover times, mean that aircraft are spending more time in revenue-generation mode, and less time in the hangar. "Collectively, the positive results we have experienced to date cannot be undersold," says Mr. Sun, "Factoring in the cost reductions achieved to date, we are positioning ourselves for stronger financial performance." Within two years of site activation, China Airlines saw its EMO operating costs go down by U.S. $3.5 million—a significant achievement considering how the market's increasingly competitive nature is forcing operators to deliver greater services with fewer resources. Moving forward, the real-time logistical support and complete cost analysis afforded by IFS will help China Airlines to further increase its maintenance cost control and drive continuing improvements in repair quality and efficiency. The airline firmly believes that optimizing its EMO will go a long way to maintaining a positive customer experience and driving greater brand loyalty. Most importantly, according to Mr. Sun, "It supports our unending commitment to delivering the safest and most reliable passenger and cargo service in the industry."

> "Collectively, the positive results we have experienced to date cannot be undersold. Factoring in the cost reductions achieved to date, we are setting ourselves up well for stronger financial performance."
>
> -Mr. Sun Jia-Min, Senior Vice President, Engineering & Maintenance Organization, China Airlines

Benefits

- 65 percent reduction of multi crew job card waiting time in heavy maintenance
- 10 percent increase in line management process efficiencies
- 10 percent increase in heavy maintenance manpower efficiencies
- 3 percent increase in A Checks delivery efficiencies
- Average addition of 30 revenue days per year through a reduction in scheduled aircraft maintenance
- Average addition of 25 revenue days per year through a reduction in unscheduled aircraft maintenance
- Average addition of 14 revenue days per year through a reduction in heavy maintenance without an increase in labour costs

ERPNEWS