ERP NEWS
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The Future of Cloud ERP



platform thinking and data sovereignty

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EDITOR'S NOTE

The Future of Cloud ERP: Platform Thinking and Data Sovereignty

Cloud ERP is no longer defined by where systems are hosted, but by how they connect, extend, and enable decision-making across the enterprise. Increasingly, organizations are moving beyond isolated systems toward platform-based architectures—where ERP acts as a foundation for integrated workflows, intelligent automation, and data-driven operations.

At the same time, data sovereignty is emerging as a critical consideration. As enterprises operate across jurisdictions and regulatory environments, the ability to maintain control, transparency, and trust in how data is managed is becoming as important as the systems themselves. Together, these shifts are redefining what modern ERP platforms are expected to deliver.

In this edition, we explore these themes through a series of executive conversations that reflect how the role of ERP is evolving in practice.

We begin with Jon Pollock, Chief Product Officer at Acumatica, who discusses how AI is transforming ERP from a system of record into a system of execution, embedding intelligence directly into financial and operational workflows to enable faster, more informed decisions.

From Epicor, we explore the evolving role of channel ecosystems in ERP transformation. In our Q&A with Holly Oberbroeckling, Director of Channel Sales, Distribution at Epicor, we examine how partners are moving beyond implementation to play a more strategic role in enabling long-term customer success.

With Unanet, Akshay Mahajan, Executive Vice President, AEC, shares insights on the growing need to connect CRM and ERP, highlighting how unified visibility across the project lifecycle is becoming essential for forecasting accuracy and operational performance.

From a different perspective, Joanne Harrison, Sales Director and Owner at Optimum, focuses on the human side of ERP transformation, explaining why training, change management, and continuous learning must be treated as core components of any successful ERP strategy.

Finally, Dan Miller, EVP, Financials & ERP Division at Sage, explores how agentic AI is reshaping finance operations—moving beyond automation to actively progressing work within workflows, while maintaining governance, transparency, and accountability.

Across these conversations, a clear pattern emerges: ERP is evolving into a platform for execution, not just recordkeeping. Organizations are prioritizing connected data, embedded intelligence, and adaptable architectures that support continuous change.

As Cloud ERP continues to mature, success will depend not only on technology choices, but on how effectively organizations align platforms, data, and people to operate with clarity, control, and speed.



Pinar SENGUL, EDITOR

ERPNEWS

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Inside Acumatica's AI Strategy: Jon Pollock Discusses the Future of ERP

As artificial intelligence moves from experimentation to enterprise deployment, ERP vendors are under growing pressure to show how AI can deliver measurable operational value. For many organizations, the next phase of ERP is no longer about better recordkeeping alone—it is about enabling faster decisions, automating routine processes, and improving visibility across increasingly complex operations.

With its 2026 R1 release, Acumatica is placing AI at the center of that shift, embedding intelligence across finance, manufacturing, distribution, retail, and construction workflows. Rather than treating AI as a separate feature set, the company is positioning it as part of the day-to-day systems businesses already rely on to run operations.

In this ERP News Q&A, Jon Pollock, Chief Product Officer at Acumatica, discusses how AI is reshaping ERP from a system of record into a system of execution, where organizations are seeing the most immediate impact, and what capabilities are likely to define the next generation of enterprise software.

Acumatica's 2026 R1 release places a strong emphasis on AI across workflows. From your perspective, how is AI reshaping the role of ERP, from a system of record to a system of execution?

A: AI is transforming ERP from a passive system of record into an active system of execution, one that captures data and helps businesses act on it in real time. With embedded intelligence, predictive analytics, and real-time visibility, ERP becomes the operational backbone for faster, more informed decisions.



Interview with
Jon Pollock
Chief Product Officer,
Acumatica

Acumatica
The Cloud ERP

With 2026 R1, we're focused on delivering AI where work already happens—within core financial and operational workflows—so teams can move from insight to action more quickly and drive measurable outcomes across areas like supply chain performance, cost control, and resource optimization.

Q: Many ERP vendors are adding AI capabilities, but often as isolated features. How is Acumatica approaching AI differently in terms of embedding intelligence directly into day-to-day operational workflows?

A: Many vendors are layering AI on top of their platforms as standalone features. Our approach is different. We embed AI directly into the workflows customers use every day. With AI Studio, Acumatica integrates intelligence into processes such as financial review, project management, and inventory planning. This approach ensures AI isn't something users have to go out of their way to access, but a part of how work gets done. That embedded approach enables users to leverage AI to move beyond experimentation and achieve consistent, repeatable business outcomes.

Q: This release highlights capabilities across manufacturing, distribution, retail, and construction. Where are you seeing the most immediate impact of AI within these industries, and how does that differ across sectors?

A: The most immediate impact of AI is in areas where real-time visibility and responsiveness directly affect performance, but how that impact shows up varies by industry.

In manufacturing, AI improves shop floor visibility and enables faster responses to supply chain disruptions. For distributors, it's about optimizing inventory and reducing friction in order processing. Retailers benefit from more agile pricing and better demand forecasting, while construction firms use AI to improve forecasting accuracy and proactively manage project risk.

While the use cases differ by sector, the common thread is that AI helps teams make faster, more informed decisions. The specific impact depends on where operational complexity, opportunities for efficiency, and the biggest areas of risk are in each industry.

"AI is transforming ERP from a passive system of record into an active system of execution… helping businesses act on data in real time."

Q: In manufacturing environments, real-time visibility and responsiveness are critical. How do the new capabilities in 2026 R1 improve decision-making on the shop floor and across supply chain operations?

A: 2026 R1 gives manufacturers real-time visibility into both shop-floor operations and broader supply-chain dynamics. AI-driven insights help teams anticipate demand shifts, identify bottlenecks earlier, and proactively adjust production schedules. Instead of reacting to issues after they occur, manufacturers can make decisions earlier in the process, improving efficiency, reducing downtime, and maintaining continuity in volatile conditions.

Q: Construction firms often struggle with fragmented systems and project-based complexity. How does this release help organizations scale while maintaining control over costs, timelines, and resource allocation?

A: Construction firms need visibility and control across complex, project-based environments. With 2026 R1, we've embedded AI into project workflows to help teams better forecast costs, identify anomalies, and manage resources more closely. By unifying financial and operational data, teams can spot risks earlier—whether that's a budget overrun or a scheduling issue—and take action before it impacts project outcomes. That's what enables firms to scale while maintaining control.

Q: For distributors managing high transaction volumes, speed and accuracy are key. How is AI helping reduce operational friction in areas like order processing, inventory management, and fulfillment?

A: For distributors, AI reduces operational friction by streamlining high-volume processes like order management, inventory planning, and fulfillment. With real-time visibility and AI-assisted recommendations, teams can make faster, more accurate decisions, such as adjusting inventory levels or reprioritizing orders, helping them stay ahead of shifts in demand and operate more efficiently at scale.

Q: Retail continues to demand real-time responsiveness across channels. How does Acumatica's latest release support more agile decision-making in pricing, inventory, and customer engagement?

A: Retail moves fast, and the margin for error across pricing, inventory, and customer engagement is shrinking. With 2026 R1, we've embedded AI directly into these workflows so retailers can act on what's happening in real-time.

On pricing, AI helps teams identify margin risks and respond to demand shifts before they're caught off guard. For inventory, predictive capabilities help anticipate demand across locations and channels, reducing the overstock and stockout situations that erode profitability. In customer engagement, unified data across commerce and operations means teams can personalize customer interactions based on actual purchasing behavior.

Together, these capabilities give retailers the real-time visibility and AI-assisted tools to stay competitive in fast-moving, omnichannel environments.

Q: As AI becomes more embedded in ERP workflows, how should organizations think about maintaining control, transparency, and trust in automated decision-making processes?

A: Organizations should think about trust in AI across three areas: visibility, control, and governance. They need to understand how AI-generated recommendations are produced, maintain oversight of where automation is applied, and establish clear accountability for outcomes. With tools like AI Studio, Acumatica enables that balance, giving users transparency into AI outputs and the ability to refine how those capabilities are used within workflows. This approach allows organizations to adopt AI at their own pace, while maintaining control and accountability.

Q: There's a lot of discussion around AI in enterprise software, but adoption often lags behind the narrative. What are you seeing in terms of real-world adoption, and where are organizations still facing challenges?

A: We're seeing steady growth in real-world adoption, particularly in targeted use cases like financial automation, anomaly detection, and demand forecasting. However, many organizations are still in the early stages of scaling those efforts. The biggest challenges continue to be data quality, integration, and change management. Without a strong, unified data foundation, AI can't deliver consistent results. The organizations seeing the most success are taking a practical, incremental approach, starting with specific use cases tied to measurable outcomes and expanding from there. That's what enables them to move from experimentation to real business impact.

"We embed AI directly into the workflows customers use every day… so it becomes part of how work gets done."

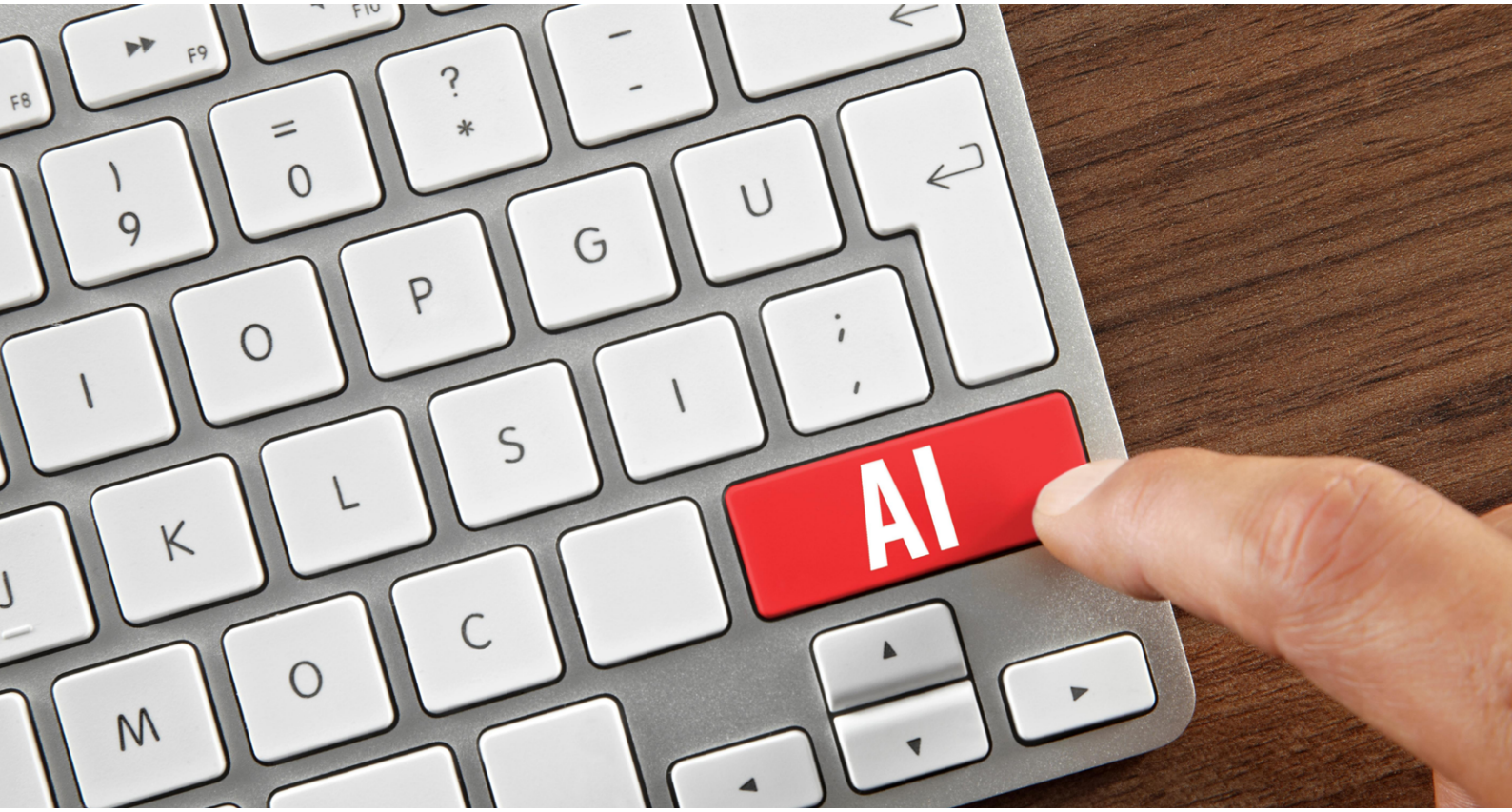
Q: Looking ahead, how do you see AI evolving within ERP systems over the next 2–3 years? What capabilities will define the next phase of ERP innovation?

A: Over the next few years, AI will become even more deeply embedded into ERP workflows, with stronger predictive capabilities and more industry-specific intelligence. The focus will continue to shift toward delivering outcomes, helping businesses anticipate change, automate routine decisions, and respond faster to evolving conditions. For mid-market organizations in particular, this evolution will make advanced capabilities more accessible and enable them to compete more effectively with larger enterprises. The organizations that build on a unified data foundation today will be the best positioned to take advantage of what's coming.

"The biggest challenges continue to be data quality, integration, and change management… organizations seeing success take a practical, incremental approach."

About Jon Pollock

As Chief Product Officer, Jon is responsible for Acumatica's technical strategy and product roadmap, development, and direction. His 25-year career spans leadership roles at major tech and payments companies, including Worldpay, Dell, Intel, Polaroid, and Asurion, with expertise in product management, development, planning, and marketing. Jon most recently served as Chief Product Officer, and later as General Manager, at Procare, where he led product managers and UX designers in developing childcare center management SaaS and payment solutions. His expanded responsibilities included sales, marketing, product development, and customer support. He also served as SVP and Chief Product Officer over Worldpay's U.S. core product. At Asurion, as VP of Product Management and Development, he led the creation of Soluto™, a premium tech support service for smartphone users with over 40 million monthly subscribers.





Channel Partners Redefined: Driving ERP Transformation Beyond Implementation

As ERP continues to evolve into the operational backbone of modern enterprises, the role of channel partners is undergoing a significant transformation. No longer limited to resale and implementation, partners are increasingly expected to act as strategic advisors—supporting customers across the full lifecycle, from modernization to long-term value realization.

In this ERP News Q&A, Holly Oberbroeckling, Director of Channel Sales at Epicor, shares her perspective on how partner ecosystems are evolving in response to changing customer expectations, cloud adoption, and the growing importance of industry specialization. Drawing on her experience across Epicor, Infor, Oracle, and Hewlett Packard Enterprise, Holly outlines what it takes to build scalable, high-performing partner networks in today's enterprise software landscape.

1. Q: From your perspective, how has the role of channel partners evolved in the ERP landscape over the past few years?

A: Holly: Channel partners have moved well beyond being transactional resellers. Today, they are expected to help customers evaluate, implement, extend, and support ERP as part of a broader business transformation agenda. In ERP, especially in distribution and industry-specific environments, customers want partners who understand operations, can guide modernization, and can stay engaged after the sale to drive adoption and outcomes. That shift makes partners far more strategic than they were even a few years ago.



Interview with
Holly Oberbroeckling
Director of Channel Sales,
Epicor
EPICOR

2. Q: What are the key priorities for building a high-performing partner ecosystem in today's enterprise software market?

A: Holly: The biggest priorities are clarity, enablement, specialization, and mutual commitment. Partners need a clear framework, strong onboarding, ongoing sales and services enablement, and access to demand generation and value-engineering resources. Just as important, the ecosystem performs best when partners have room to differentiate by industry, micro-vertical expertise, and customer intimacy rather than competing on generic product access alone.

3. Q: As ERP becomes more central to business transformation, how are expectations from channel partners changing?

A: Holly: Expectations are rising across several areas, including business advisory capability, delivery consistency, integration expertise, and post-sale engagement. Customers increasingly expect partners to tie ERP decisions to measurable business outcomes—not just software features. At the same time, partners are being relied on not only for strong implementation discipline, but also for deep integration expertise and the ability to build custom extensions that address specific customer needs. There is also a growing expectation that partners remain actively engaged after go-live, supporting adoption, optimization, and ongoing innovation. This evolution reflects ERP's expanding role at the center of cloud, data, and broader operational transformation initiatives.

4. Q: What capabilities or investments are becoming critical for partners who want to move beyond transactional sales and build long-term value?

A: Holly: Partners need to invest in repeatable delivery methods. This includes certified skills, customer success motions, and industry-specific solution depth. They also need stronger capabilities around integration, cloud migration, and change management so they can stay relevant throughout the customer lifecycle.

"In ERP, especially in distribution and industry-specific environments, customers want partners who understand operations, can guide modernization, and can stay engaged after the sale to drive adoption and outcomes. That shift makes partners far more strategic than they were even a few years ago."

5. Q: How does Epicor approach partner enablement to ensure consistency across sales, delivery, and customer success?

A: Holly: The approach is end-to-end. Our team emphasizes a smooth onboarding process, channel sales and services enablement, partner-hub resources around marketing, easy access to training materials, demand-generation tools, value-engineering support, and front-line support across solutions.

6. Q: In your experience, what differentiates partners that scale successfully from those that struggle to grow?

A: Holly: The partners that scale usually do a few things consistently well: they specialize, they invest in capability early, and they stay aligned with the vendor on execution. They do not treat ERP as a one-time license motion; they build services, customer relationships, and domain credibility around it. The partners that struggle tend to remain too opportunistic, underinvest in enablement, or fail to build repeatable practices.

7. Q: How do you see the balance evolving between vendor-led strategy and partner-led innovation within the ERP ecosystem?

A: Holly: The strongest ecosystems are not vendor-only or partner-only; they are collaborative by design. Vendors should provide platforms, roadmaps, enablement, and guardrails. Partners should bring vertical expertise, service innovation, local market reach, and customer-specific extensions.

8. Q: What role does collaboration play in driving demand generation and pipeline growth across partner networks?

A: Holly: Collaboration is central. Pipeline grows faster when vendors and partners align around target markets, messaging, co-marketing, and shared execution.

Epicor explicitly highlights collaboration, demand-generation tools, dedicated sales support, and a partner community model built around working together to reach more customers and accelerate deals. In practice, that means the best pipeline outcomes usually come from coordinated plays rather than isolated partner activity.

9. Q: As cloud, AI, and automation continue to reshape enterprise systems, how should partners adapt their go-to-market strategies?

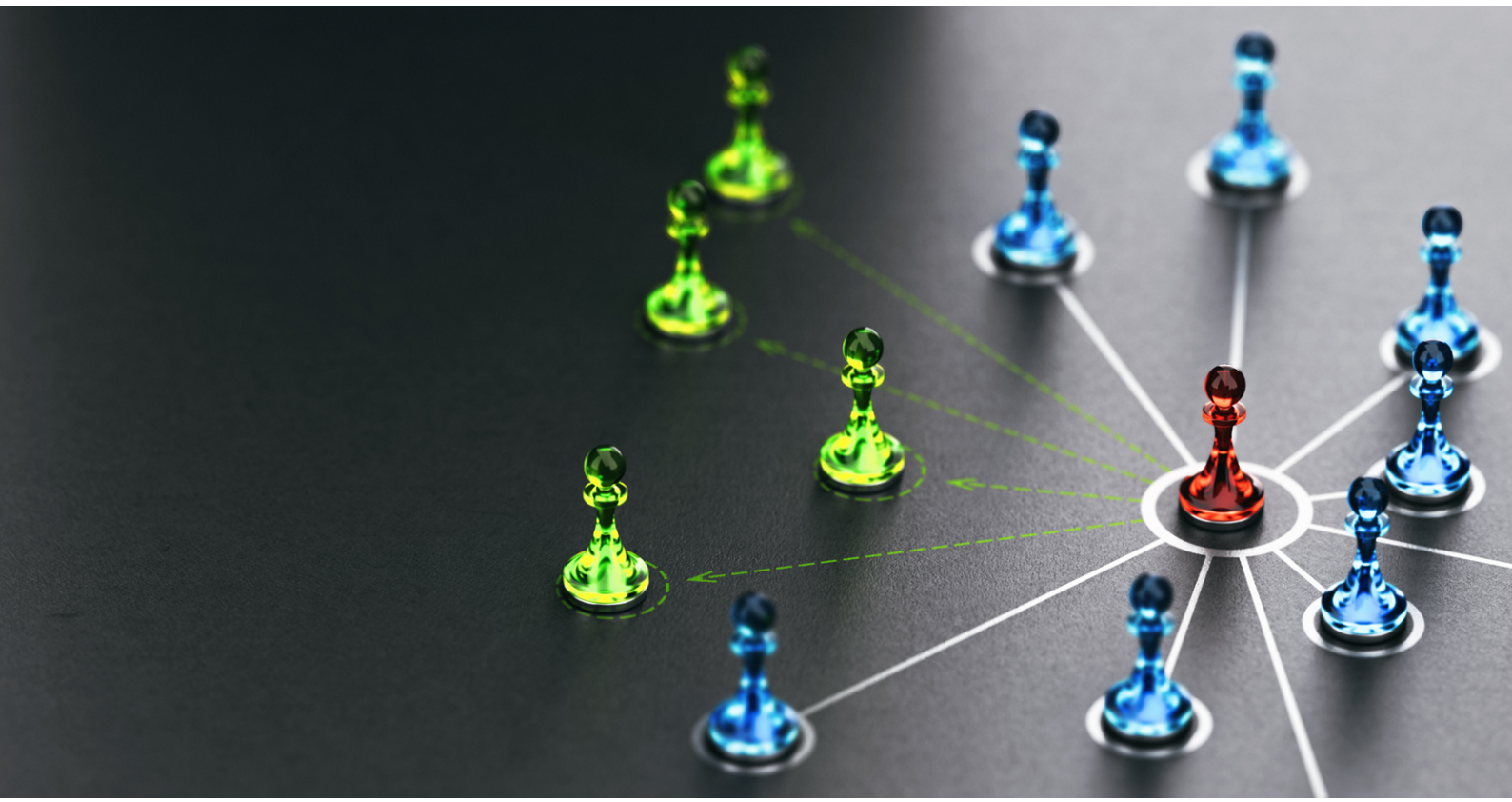
A: Holly: Partners should lead with business outcomes, not just product positioning. Cloud, AI, and automation change the conversation from "which ERP system" to "how do we improve productivity, resilience, and decision-making faster." That means partners need sharper points of view on modernization, clearer migration paths, and stronger integration and advisory capabilities.

10. Q: Looking ahead, what should partners prioritize over the next 12–24 months to remain competitive and relevant in the ERP space?

A: Holly: Over the next 12–24 months, partners should prioritize four things: deep industry specialization, cloud and services readiness, stronger customer success discipline, and practical AI/automation relevance. The market is moving toward fewer generic players and more partners who can show measurable value in a defined segment. For ERP ecosystems like Epicor's, that likely means doubling down on enablement, certifications, solution extensions, and differentiated expertise that ties technology to operational results.

About Holly Oberbroeckling

Holly Oberbroeckling is a seasoned channel sales leader with deep experience in the ERP and enterprise software space. As Director of Channel Sales at Epicor, she focuses on driving growth and strengthening partner ecosystems across the distribution market. Holly brings more than a decade of experience building and scaling partner channels, including leadership roles at Infor where she led North American distribution channels, as well as prior sales leadership positions at Oracle, Hewlett Packard Enterprise, and SBS Group. Known for her strategic approach to partner development and revenue growth, she helps organizations expand market reach and deliver value through strong channel relationships.





Connecting the Dots: How Integrated CRM and ERP Are Reshaping Construction Performance

As construction firms navigate increasing project complexity, tighter margins, and rising expectations around forecasting and delivery, the limitations of disconnected systems are becoming more visible. Historically, CRM and ERP platforms have operated in silos—separating pipeline visibility from project execution and financial performance.

Today, that model is under pressure. Organizations are looking for more connected, real-time insight across the full project lifecycle, from opportunity through delivery. This shift is redefining what enterprise platforms are expected to deliver—not just retrospective reporting, but forward-looking intelligence that supports faster, more informed decision-making.

In this ERP News Q&A, Akshay Mahajan, Executive Vice President of AEC at Unanet, discusses why integration between CRM and ERP has remained a challenge in project-based industries, how it impacts operational risk and forecasting, and what a more connected, AI-enabled ecosystem could mean for the future of construction firms.

1. The partnership between Unanet and Xpedeon focuses on connecting CRM and ERP in construction. Why has this disconnect persisted for so long in project-based industries?

In project-based industries like construction, CRM and ERP systems have historically evolved in separate parts of the organization and were designed to solve different problems. Business development teams adopted CRM tools to manage relationships, opportunities, and proposals, while finance and operations teams relied on ERP systems to run accounting, job-costing, project management, procurement, and resource planning. Because these platforms were built for distinct users and workflows, they rarely shared the same data structures or integrations. As a result, many construction firms still operate with disconnected systems where pipeline data, project performance metrics, and financial insights live in different places—making it difficult for leadership teams to see a complete picture of how opportunities translate into project outcomes and profitability.



Interview with
Akshay Mahajan,
Executive Vice President of AEC,
Unanet

At the same time, construction has traditionally adopted technology more cautiously than many other sectors, often relying on specialized point solutions built for specific functions. That fragmentation has made it challenging to create a unified view from opportunity through project delivery. However, as construction firms face tighter margins, more complex projects, and increasing pressure to forecast growth accurately, the need for integrated systems has become more urgent. Connecting CRM and ERP enables companies to align business development with operations and finance, giving them real-time visibility into pipeline, project performance, and profitability—helping leaders make faster, more informed decisions across the full project lifecycle.

2. From your perspective, what are the most common operational risks that arise when business development and project delivery systems remain siloed?

When business development and project delivery systems operate in silos, one of the most significant risks is that the intelligence used to win the work never fully carries through to the teams responsible for delivering it. In construction—where margins are already tight—that disconnect can be costly.

During the pursuit process, business development teams capture critical context: client priorities, scope nuances, pricing assumptions, risk factors, and commitments made in the proposal. If that information doesn't translate directly and immediately into project and financial systems, delivery teams are forced to fill in the gaps. The result is often misalignment around scope, budget, timelines, and expectations—leading to inaccurate forecasting, margin erosion, avoidable change orders, and, in some cases, strained client relationships.

The risk flows in the other direction as well. When project performance data doesn't feed back into CRM systems, firms lose the ability to learn from execution. Without visibility into actual costs, delivery challenges, and project outcomes, teams are left relying on assumptions when pursuing new work. That makes it harder to price accurately, qualify the right opportunities, and consistently win profitable projects.

> "CRM and ERP systems have historically evolved in separate parts of the organization… making it difficult for leadership teams to see a complete picture of how opportunities translate into project outcomes and profitability."

Ultimately, siloed systems break the feedback loop that high-performing firms rely on. Leadership lacks a connected view across pipeline, contracts, delivery, and financial performance—making it difficult to understand which work drives margin, how current pursuits will impact future capacity, and where risks are emerging. In an industry defined by complexity and thin margins, that lack of alignment limits both operational control and long-term growth.

3. We're seeing increasing pressure on construction firms to improve visibility across the full project lifecycle. How is this changing expectations from ERP systems and broader enterprise platforms?

Construction firms are no longer just asking for visibility—they're asking for control across the full project lifecycle. That shift is fundamentally changing what they expect from ERP systems and broader enterprise platforms.

Historically, ERP was built to record what already happened: costs, revenue, and financial performance after the fact. Today, that's table stakes. Firms now expect their systems to help them anticipate what's coming next—from margin risk and resource constraints to cash flow and project performance—while there's still time to act.

That expectation is being driven by a more complex operating environment. Projects are larger, timelines are tighter, subcontractor networks are more dynamic, and client expectations are higher. At the same time, growth depends

on making better decisions earlier—during pursuit, planning, and project setup—not just during execution. That requires a level of connected insight that traditional, siloed systems simply can't provide.

As a result, we're seeing a clear shift toward platforms that unify the entire lifecycle—from pipeline and bidding through delivery and financial performance. It's no longer enough to integrate systems at a surface level. Firms want a continuous flow of intelligence where CRM, ERP, and project operations are working from the same data, in real time.

The bar for enterprise platforms is rising accordingly. Leaders expect intuitive access to answers—not static reports—along with forward-looking insights that are role-specific and actionable. Whether it's understanding how today's pipeline will impact future capacity, identifying margin risk before it materializes, or aligning project execution with the commitments made during pursuit, the expectation is clear: the system should not just track the business—it should help run it.

4. How does tighter integration between CRM and ERP impact decision-making at the executive level, particularly in terms of forecasting and resource planning?

Tighter integration between CRM and ERP fundamentally changes executive decision-making by connecting pipeline intent with delivery reality. It gives leaders a clear line of sight from opportunities to revenue, resource demand, and project commitments—something that's difficult to achieve when systems are disconnected.

On the forecasting side, this means moving from static, siloed projections to dynamic, real-time visibility. Executives can see how current pipeline translates into future revenue, how likely that work is to convert, and what it will require to deliver. That leads to more accurate forecasting and earlier insight into potential risks around margin, timing, or cash flow.

> "The intelligence used to win the work never fully carries through to the teams responsible for delivering it… and in construction—where margins are already tight—that disconnect can be costly."

The impact on resource planning is just as significant. In many firms, pursuit decisions are made without a full understanding of current capacity or upcoming demand. With integrated systems, leaders can align pipeline strategy with available talent, subcontractor capacity, and project performance. They can identify constraints before they become bottlenecks and make more disciplined decisions about which work to pursue—or pass on.

Ultimately, integration enables a shift from reactive to proactive leadership. Instead of managing handoffs between teams, executives operate from a shared, real-time view of the business—where growth, delivery, and financial performance are continuously aligned.

5. Construction firms often operate across multiple stakeholders, contracts, and timelines. How important is real-time data in managing this complexity, and where are companies still falling short?

Real-time data has become essential for construction firms because of the sheer complexity involved in delivering projects today. Most construction companies are managing multiple stakeholders, layered contracts, evolving scopes, and long project timelines—all while navigating tight margins and shifting market conditions.

Real-time visibility allows teams to monitor project performance, track costs against budgets, and understand how changes in one area—such as delays, change orders, or supply chain issues—can impact the broader project portfolio. That level of insight helps executives respond faster, manage risk more proactively, and keep projects aligned with financial and operational goals.

Where many firms still fall short is in how their data is captured, connected, and managed across their systems. When those systems are disconnected, leaders are forced to rely on manual reporting, spreadsheets, or delayed updates to piece together a view of project performance. The result is

that decisions are often based on outdated or incomplete information.

> "It's no longer enough to integrate systems at a surface level. Firms want a continuous flow of intelligence where CRM, ERP, and project operations are working from the same data, in real time."

6. AI is increasingly being embedded into both CRM and ERP systems. Where do you see the most immediate value for AI in construction workflows?

AI is beginning to change what firms expect from these platforms. Construction companies are moving beyond static reporting toward systems that can actively surface insights, identify challenges, flag issues before they escalate, and guide decisions across both growth and delivery, all in the context of employee and project workflows. AI can help analyze historical project data to improve forecasting, highlight which opportunities are the best strategic fit, and flag potential delivery risks earlier in the project lifecycle. Looking ahead, agentic AI will take this even further by helping automate routine workflows and coordinate actions across systems—whether that's helping teams prepare proposals, surface key project metrics, or alert leaders when performance trends shift. Ultimately, the goal is to move from disconnected tools and retrospective reporting toward intelligent platforms that consistently help construction firms make better decisions from opportunity through delivery.

7. What distinguishes firms that are successfully building a more connected technology ecosystem from those that are still struggling with fragmentation?

Firms that are successfully building a more connected technology ecosystem tend to approach technology as a strategic foundation for the business, not just a collection of tools for individual teams. In many construction organizations, systems were historically adopted department by department—business development selected a CRM, finance implemented an ERP, and project teams used separate project management platforms. That's how fragmentation developed.

What we consistently see reflected in Unanet's AEC Inspire benchmarking reports is that top-performing AEC firms are investing in integrated systems that improve visibility and decision-making across the business. There is a direct connection between system connectivity and bottom-line firm performance. Firms that report stronger growth and profitability tend to have greater alignment between their business development, operations, and finance teams because they're working from the same data. At the same time, the research shows many firms are still challenged by disconnected systems, manual reporting, and limited visibility into pipeline and project performance. The companies pulling ahead are those that recognize technology isn't just about efficiency, it's about giving leaders the insight they need to forecast growth, allocate resources more effectively, and manage projects with greater confidence from opportunity through delivery.

8. How does this partnership translate into measurable outcomes for customers using Unanet or Xpedeon today?

The real value of our Unanet Xpedeon partnership is that it helps construction firms connect the entire lifecycle of their work—from identifying opportunities to delivering projects and managing financial performance. By bringing together Unanet's purpose-built CRM for the construction industry with Xpedeon's construction ERP, customers gain pathways for information to flow seamlessly, in a timely way, between business development, operations, and finance. That means when a firm pursues a project, the opportunity data, proposal assumptions, and client insights captured in CRM can flow directly into project execution and financial management. The result is better alignment across teams, fewer manual handoffs, and clearer visibility into how pipeline decisions translate into project outcomes.

That translates into measurable improvements in several areas. Firms gain more accurate forecasting

because leadership can see how pipeline opportunities connect to resource demand and revenue. Project teams benefit from stronger visibility into budgets, timelines, and client commitments established during the pursuit phase. And executives have a more complete view of project and portfolio performance, allowing them to make faster decisions about which opportunities to pursue, how to allocate resources, and where to drive growth. Ultimately, the partnership helps construction firms operate with greater predictability and control—linking opportunity, delivery, and financial performance within one connected environment.

9. For mid-market construction firms in particular, what are the biggest barriers to achieving this level of integration today?

For mid-market construction firms, the biggest barriers to this level of integration are less about intent and more about how their systems—and teams—have evolved over time.

Most firms didn't design their tech stack end-to-end. Instead, they've adopted point solutions to solve immediate needs across business development, project management, accounting, and field operations. The result is a fragmented environment where data lives in separate systems, processes rely on manual handoffs, and integration becomes complex and costly to maintain.

There's also a resource constraint. Mid-market firms typically don't have the internal IT capacity to support custom integrations or large transformation efforts. Even when integrations exist, they can be brittle and difficult to scale.

Just as important, integration isn't purely a technology challenge—it's operational. Business development, operations, and finance often operate with different processes and metrics, making alignment difficult.

What's changing is the expectation. Firms are shifting toward purpose-built platforms and partnerships—like integrated CRM and ERP solutions—that connect workflows out of the box and make lifecycle visibility achievable without heavy customization.

> "Ultimately, CRM, ERP, and project systems won't operate separately. They'll function as a unified, AI-enabled platform that connects—and actively guides—the entire project lifecycle."

10.Looking ahea d, how do you see the relationship between CRM, ERP, and project execution evolving over the next 3–5 years?

Over the next three to five years, CRM, ERP, and project execution systems will become far more interconnected—and far more intelligent—driven largely by AI.

As highlighted in Unanet's AEC Inspire Report, firms are under increasing pressure to improve forecasting, win the right work, and deliver projects with tighter margins. Meeting that demand requires systems that don't just store data but actively interpret and act on it.

We're already seeing this take shape within CRM. Unanet's solutions like OpportuneAI help firms analyze pipeline and historical performance to identify the best-fit opportunities, while ProposalAI enables teams to generate stronger, faster proposals using governed project and client data. When these capabilities are embedded directly into CRM workflows, they strengthen decision-making at the earliest stages of the lifecycle.

The real shift happens when that intelligence carries through into ERP and project execution. Firms gain a continuous flow of insight—from identifying the right opportunity, to winning the work, to delivering it profitably.

Ultimately, CRM, ERP, and project systems won't operate separately. They'll function as a unified, AI-enabled platform that connects—and actively guides—the entire project lifecycle.



Beyond Go-Live: Why ERP Success Depends on Training, Adoption, and Continuous Learning

As ERP programmes grow in scale and complexity, many organizations continue to underestimate one of the most critical drivers of success: user adoption. While significant attention is often placed on system design, data migration, and technical delivery, the ability of users to understand, adopt, and sustain new ways of working remains a defining factor in whether transformation efforts deliver long-term value.

In practice, this is where many ERP initiatives fall short. Training is frequently treated as a late-stage activity rather than a strategic component of transformation, leading to gaps between system capabilities and real-world usage. As cloud ERP platforms introduce continuous updates and more dynamic operating models, the role of training is also evolving—from a one-time project task to an ongoing organisational capability.

In this ERPNews Q&A, Joanne Harrison, Sales Director and Owner at Optimum, shares insights from supporting over 800 global ERP programmes, discussing why training must be embedded into transformation strategy, how organisations can drive sustainable adoption, and what the future of ERP learning will look like in an increasingly continuous and AI-supported environment.

1. Large-scale ERP transformations often focus heavily on technology — where do you see organisations underestimating the role of training and user adoption?

Many organisations still view training as a downstream activity that happens once the system is built, rather than as a core enabler of transformation. As a result, training is often compressed into a short window before go-live and treated as system instruction rather than behavioural change.

What is frequently underestimated is the impact of role-specific, process-led training on productivity, confidence, and early system stabilisation. Without this, users may technically know where to click, but they do not understand how the new system supports the way the business is meant to operate. This disconnect is one of the most common causes of low adoption, workarounds, and delayed realisation of benefits.



Interview with
Joanne Harrison,
Sales Director and Owne,
Optimum
optimum

2. In a multi-country S/4HANA programme like Asahi's, what are the biggest challenges in delivering consistent training across regions, languages, and business units?

The biggest challenge is balancing global consistency with local relevance. Global programmes need a common process and data model, but local teams still operate within different regulatory environments, cultures, and levels of ERP maturity.

From a training perspective, inconsistency often creeps in when materials are reused without sufficient localisation, or where delivery approaches vary significantly between regions. Language translation alone is rarely sufficient. Effective global training programmes adapt examples, terminology, and emphasis to reflect how users work locally, while still reinforcing the global design and core business processes.

A critical success factor is having a central figure or function overseeing the global training workstream. Strong PMO-style oversight provides a single coordination point, ensuring clarity, consistency, and alignment across regions. This role helps manage training resources, onboarding and off-boarding, system access, delivery schedules, and risk management, while maintaining clear communication between global and local teams. Combined with strong governance, a clear training architecture, and centrally managed core content supported by structured local adaptation, this approach is essential to maintaining quality and consistency at scale.

3. From your experience, what differentiates organisations that successfully drive ERP adoption from those that struggle post go-live?

Organisations that succeed put people and processes on an equal footing with technology from the very start. They invest time in understanding who their users are, what will change for them, and how success will be measured beyond go-live. Crucially, they recognise that ERP adoption is a change management challenge as much as a technical one.

It is no coincidence that many high-profile ERP programmes that struggle or fail cite insufficient change management and user adoption as key contributing factors. Where organisations underestimate the scale of behavioural change required, even well-designed systems can fail to deliver value.

Successful organisations also view go-live as a transition point, not an endpoint. They plan for reinforcement, ongoing support, and continuous learning, ensuring users — and importantly new joiners — have access to guidance when they need it. In contrast, organisations that struggle often rely on one-off training events and assume adoption will follow naturally, which rarely happens in complex ERP environments.

4. How is the role of ERP training evolving as organisations move from one-time implementations to continuous transformation cycles?

ERP training is shifting from a project-based activity to an ongoing capability. With cloud ERP platforms delivering frequent updates and enhancements, organisations can no longer rely on static training materials or infrequent refresher sessions.

Training now needs to support continuous learning, rapid onboarding, and just-in-time support. This requires modular content, digital delivery models, and stronger internal ownership. Increasingly, organisations are also focusing on building internal training capability through super users and centres of excellence, rather than relying solely on external support.

> "Many organisations still view training as a downstream activity… rather than as a core enabler of transformation."

5. To what extent should training be integrated into the overall transformation strategy, rather than treated as a supporting function?

Training should be fully embedded within the transformation strategy, not treated as a parallel workstream or afterthought. Decisions made

during system design, process design, and data migration all directly affect how users need to be trained.

When training is considered early, it can provide valuable feedback on usability, complexity, and readiness. It also ensures that change messages are consistent and reinforced throughout the programme. Ultimately, training is the primary mechanism through which transformation is realised at an end user level.

6. What are the most common gaps you see between system design and user readiness in large ERP programmes?

A common gap is the assumption that a well-designed system will naturally be intuitive for users. In reality, ERP systems reflect integrated, end-to-end processes that may be very different from legacy ways of working.

Users are often not prepared for changes in accountability, data ownership, or cross-functional dependencies. Training that focuses solely on transactions, without explaining the wider process context and business rationale, leaves users unprepared for these shifts. Addressing this gap requires training that mirrors the actual system build and clearly explains the "why" behind the change.

7. How are digital learning platforms, AI, or automation changing the way enterprises approach ERP training at scale?

Digital learning platforms have significantly improved organisations' ability to train large, geographically dispersed user populations more efficiently and flexibly. Self-paced learning, blended approaches, and role-based learning journeys are now standard expectations rather than innovations, particularly for high-volume or light-touch user groups.

"Organisations that succeed put people and processes on an equal footing with technology from the very start."

AI and automation are beginning to enhance this further through personalised learning paths, content recommendations, and faster content creation. These capabilities can be highly effective for supporting everyday tasks and reinforcing knowledge at scale. However, technology alone is not the solution. Digital adoption platforms have inherent limitations when it comes to complex, judgement-driven processes, cross-functional scenarios, and regulatory or compliance-heavy environments.

As a result, organisations achieving strong ERP adoption increasingly recognise digital learning tools as important supplements rather than substitutes for expert-led training. Traditional classroom-based and instructor-led sessions continue to play a vital role, particularly for users experiencing significant change, those with high system usage, or where deeper process understanding is required.

The most effective ERP training strategies combine digital learning with strong instructional design, domain expertise, and human facilitation. This blended approach ensures users not only know how to perform tasks but understand the wider business context and can apply learning with confidence, laying the groundwork for sustainable adoption and long-term operational excellence.

8. In global programmes, how do you balance standardisation with the need for local relevance in training content and delivery?

The most effective approach is to standardise structure and core content, while allowing controlled localisation. This means a single global training framework, common learning objectives, and consistent messaging, supported by regionally adapted examples, language, and delivery formats.

A critical enabler of this balance is structured knowledge transfer with subject matter experts (SMEs) across regions. Early engagement with local SMEs allows training consultants to capture regulatory nuances, process variations, and practical ways of working, ensuring these

details are accurately reflected within both the training materials and delivery approach, without undermining the global design.

Clear governance remains essential, alongside centrally managed materials and the use of trainer packs. Together, these ensure that regardless of who delivers the training or where it takes place, users receive a consistent learning experience that still feels relevant, credible, and aligned to their local reality.

9. What role does ongoing support and knowledge management play after initial training is completed?

Ongoing support is essential to sustaining adoption and business performance post go-live. Users inevitably encounter scenarios that were not covered in training or simply need reassurance when working through new processes.

Well-structured knowledge management, including reference guides, quick cards, digital learning content, and access to knowledgeable support, reduces reliance on informal workarounds and key individuals. It also helps organisations retain knowledge as teams change and systems evolve.

10. Looking ahead, how do you see ERP training evolving over the next few years as enterprise systems become more complex and continuously updated?

ERP training will become more continuous, more personalised, and more closely aligned to ongoing business change. As cloud-based ERP platforms evolve more rapidly, training content will need to be easier to update, quicker to deploy, and embedded into day-to-day operations rather than delivered as a one-off event.

We are already seeing a significant increase in demand for structured ERP training services, with organisations clearly taking the training and adoption phase more seriously and involving it much earlier in the programme lifecycle. Training is increasingly viewed as a strategic enabler of value, rather than a reactive activity once the system is built.

"ERP training will become more continuous, more personalised, and more closely aligned to ongoing business change."

A similar shift is also emerging among ERP vendors and implementation partners. As subscription-based commercial models become the norm, there is a growing recognition that long-term success depends on effective adoption and sustained system usage. Ensuring users are confident, competent, and supported post go-live is now as important as delivering the technology itself.

Looking ahead, we expect organisations to place even greater emphasis on building internal training capability, supported by high-quality digital assets, strong governance, and expert guidance. Ultimately, the most successful ERP programmes will be those that treat learning as a strategic investment, enabling their workforce to adapt alongside their systems and fully realise long-term value.



About Joanne Harrison

Jo Harrison is Sales Director and Owner of Optimum, an independent ERP training and change consultancy focused on driving user adoption. Having been with Optimum since its founding in 1998, Jo leads the company's commercial strategy, business development, and client partnerships. Under her leadership, Optimum has supported over 800 global ERP programmes across a wide range of industries and platforms, including Microsoft Dynamics 365, SAP, Oracle and IFS. Jo is passionate about the people side of ERP transformation and believes technology only delivers value when users are confident, capable, and supported in new ways of working.



From Automation to Execution: How Agentic AI Is Redefining the Role of Finance Teams

As artificial intelligence becomes more embedded in enterprise systems, finance is emerging as one of the first functions to experience a fundamental shift in how work gets done. The conversation is moving beyond automation and efficiency gains toward a more advanced model—where AI not only supports decisions but actively progresses tasks within financial workflows.

This evolution introduces new questions around trust, governance, and accountability, particularly in environments where accuracy and compliance are critical. At the same time, it is reshaping the role of finance teams, shifting focus from transaction processing to oversight, exception management, and strategic decision-making.

In this ERPNews Q&A, Dan Miller, EVP of Financials & ERP Division at Sage, discusses how agentic AI is transforming finance operations, what differentiates true workflow execution from traditional automation, and how organizations can balance innovation with control as AI becomes a core part of enterprise decision-making.

1. Sage is positioning AI agents as moving beyond analysis into executing tasks within workflows. What changes inside finance teams when AI shifts from "supporting decisions" to actively progressing work?

The biggest change is how finance teams spend their time - moving away from manual execution and toward exception-based review and oversight. In addition, AI can help move work forward. For example - AI agents can prepare actions such as payment reminders or approvals inside software like Sage Intacct, while people remain responsible for reviewing and authorizing outcomes. For finance teams, that creates room to focus less on repetitive processing and more on judgment, oversight, and action.



Interview with
Dan Miller,
EVP, Financials & ERP Division,
Sage

2. Trust and accountability have been central themes across Sage's recent announcements. In practical terms, how can CFOs confidently stand behind decisions that are partially driven by AI?

CFOs can stand behind AI-supported decisions only if the system is designed with built-in governance and trust. Sage is committed to building AI you can trust, which comes down to three things: confidence, control, and accountability. Users should be able to understand how an output or recommendation was produced, humans should approve actions, and every AI-provided output should be traceable and auditable.

> "Agentic AI can proactively identify issues, prepare recommended actions, and progress work within defined guardrails… helping move work forward in a governed, explainable, and controlled way."

CFOs remain accountable for the accuracy of the information they provide, so they need transparency into what the AI did, what prompted it, how it arrived at an outcome, and who approved the final action. Privacy and security expectations also cannot change just because AI is involved. In a high-stakes environment like finance, trust has to be built into the way AI works from the start.

3. Despite rapid innovation, many finance teams still struggle with fragmented systems and data silos. Based on what you're seeing with customers, what is the biggest blocker to meaningful AI adoption today?

AI has the potential to help solve the data fragmentation problem. Fragmentation itself is not really a blocker as AI has the capability of working across systems to bring things together. Sage is doing this with our Developer Program.

The biggest blocker to adoption is the fear that you have to do it all at the same time. In conversations with thought-leading CFOs, choosing where to test AI and having a rigorous program for evaluation is helping companies adopt advanced technology and deliver time saving value. The real trick is to not be overwhelmed by all the noise and industry hype and rather be focused on business outcomes and willing to try new things to drive those outcomes.

4. There is growing momentum around agentic AI across the industry. Where do you see the real difference between incremental automation and truly agent-driven workflows in finance?

Incremental automation improves efficiency, but it doesn't fundamentally change how work flows through finance processes – agent-driven workflows do. Traditional automation speeds up individual steps but still relies on humans to push work forward. Agentic AI can proactively identify issues, prepare recommended actions, and progress work within defined guardrails. At Sage, these agents are domain-specific and deeply embedded into finance workflows, operating with supervised autonomy. The system knows when to assist, when to prepare actions, and when to require human approval. The value of agentic AI is not simply that it can act, but that it can help move work forward in a governed, explainable, and controlled way.

5. As more processes become automated, how do organizations maintain control, auditability, and governance—especially in highly regulated environments?

To maintain control, AI should operate with the same governance and accountability as humans. Consequential actions should require explicit human approval; agents should operate within clearly defined guardrails and permissions; and every action should be auditable.

This is how Sage AI capabilities operate - within customer-defined permissions, approval thresholds, and audit requirements; high-impact actions require explicit human authorization; and every AI-supported step is recorded. This ensures nothing happens without accountability or visibility. AI assists and prepares work, but decision making requires human intervention. The system maintains a full audit trail covering recommendations, approvals, and execution, supporting compliance and regulatory review.

6. Many of the latest developments point to a shift in how finance operates. How do you see the role of finance teams evolving over the next 2–3 years as AI becomes more embedded in day-to-day workflows?

Over the next few years, finance teams are likely to spend less time processing transactions and more time reviewing exceptions, applying judgment, and helping guide the business. As AI becomes more embedded in day-to-day workflows, the role of finance will shift from manual execution toward oversight, decision-making, and driving the business.

That change will make finance roles more strategic. CFOs and operations leaders will have a broader set of responsibilities including business strategy, investment decisions, and predictive analytics. Teams will be expected to move faster while maintaining strong judgment, governance, and clarity. As more routine work is automated, finance leaders will play a bigger role in validating outcomes, managing risk, and helping shape business decisions with greater confidence.

7. Sage is bringing together finance, HR, and operational workflows into a more connected platform. How do you ensure this increased integration reduces complexity rather than introducing new layers to manage?

The purpose of integration is to remove friction, not create additional layers. Sage's approach focuses on connecting workflows natively, so data moves automatically between finance, HR, payroll, and operations, through solutions like Sage HCM. This reduces duplicate entry, eliminates unnecessary reconciliations, and gives teams a single source of truth. Sage HCM links HR, payroll, and workforce data directly into finance workflows so organizations have a clearer view of labor costs and less duplicate entry between systems.

This type of integration reduces complexity when it improves visibility, removes manual handoffs, and helps customers operate from shared, trusted data rather than creating another layer on top.

8. With the expansion of the developer platform and AI tooling, partners are playing a growing role in innovation. How do you balance openness with maintaining consistency, trust, and quality across the ecosystem?

The right balance is openness within a governed platform model. Sage is opening its platform through tools like Agent Builder and the AI Gateway, but all partner built solutions operate within Sage's framework centered around trust, control, and accountability. This enforces consistent standards for security, interoperability, explainability, and auditability.

That balance allows partners to innovate and bring specialized expertise into customer workflows, while ensuring customers experience the same level of confidence and control whether a capability is built by Sage or by a partner. Strong governance at the core makes it possible for partner-built agents to integrate into workflows while still meeting the standards customers expect in finance and operations.

9. Sage continues to invest in industry-specific capabilities across its portfolio. How important is vertical specialization in delivering real value from AI, compared to more general-purpose solutions?

Industry specialization is very important because workflow varies by industry. Sage embeds deep domain expertise directly into its AI models and workflows, so recommendations reflect industry-specific operational and compliance requirements. General-purpose AI can be powerful, but real value comes from embedding AI into the actual workflows, rules, and contexts in which customers operate.

10. As AI becomes more embedded across finance and operations, how should organizations measure success? What metrics actually indicate that these technologies are delivering meaningful business value?

Success isn't measured by how often AI is used, but by the outcomes it enables. The most meaningful metrics are the ones that show whether teams are saving time, reducing errors, improving visibility, and operating with stronger confidence - things like routine finance tasks taking minutes not days, fewer errors, better visibility, and stronger confidence because every action is traceable and governed. When finance teams can move faster with more clarity and control, AI is delivering real value.



From intelligence to impact: How agentic AI is reshaping today's supply chain

Supply chain disruption is no longer the exception. It is the daily reality every business operates, driven by geopolitical instability, supplier failures, regulatory changes, and freight volatility. The challenge is not identifying disruption; it is synthesizing it fast enough to act. Businesses are flooded with signals across suppliers, logistics, operations, and compliance, but those signals remain fragmented across systems and teams, forcing reactive trade-offs instead of strategic action.

The leaders in this next era will be defined not by visibility alone, but by their ability to turn disruption into coordinated, cross-functional action before the cost of delay becomes too high. That's where agentic AI comes in.

Agentic AI redefines the supply chain workflow

As supply chains become more dynamic, the way work gets done and operations are run is changing, and agentic AI is at the forefront. Agentic AI enables people and systems to work together more effectively, and Gartner predicts 60% of supply chain disruptions will be resolved without human intervention by 2031 (Gartner, March 18, 2026). Agents have the ability to reason over data, take action across workflows, reduce manual effort, and support faster, more consistent execution—while keeping humans in control of decisions and outcomes.



Article by
Sameer Verma,
Vice President and Chief Product Officer of Microsoft Dynamics 365 AI ERP
Dynamics 365

Article by Sameer Verma

Frontier firms are moving beyond isolated AI use cases and focusing on how decisions and actions connect and orchestrate across end-to-end processes. This shift it happening in three practical ways:

- ***More proactive risk management:*** With access to real-time signals, teams can identify potential disruptions earlier and take action before they impact orders, production, or customer commitments.
- ***Faster, more coordinated execution and orchestration:*** Insights are surfaced directly within the flow of work, so planners and operators can act immediately.
- ***Coordinated human and agent workflows:*** Agents can take on high-volume tasks across the supply chain—from monitoring conditions to initiating actions—while people stay focused on oversight, exception handling, and strategic decisions.

The result is a more responsive operating model. Let's see how this approach comes to life in Dynamics 365 Supply Chain Management, and how organizations are using it to improve resilience, responsiveness, and end-to-end performance. Watch this video for a preview on how agentic AI with Dynamics 365 can transform your supply chain operations to a frontier firm.

Building an agentic supply chain

Enabling this model requires connecting data, decisions, and actions across the supply chain. Dynamics 365 and Microsoft 365 Copilot support this by enabling agents to work across data and business processes in a governed way—linking signals, decisions, and execution within the flow of work.

Several capabilities make this possible:

- ***Connecting agents to data and execution systems:*** The Dynamics 365 enterprise resource planning (ERP) model context protocol (MCP) Server provides agents with secure, governed access to business processes and data. Using Dynamics 365 ERP MCP Server, agents can take action across the system—such as updating orders, adjusting supply plans, or initiating transfers—based on current conditions. See how Coca-Cola Beverages Africa uses Dynamics 365 and the Dynamics 365 ERP MCP server to autonomously run planning cycles, making the lives and the work easier for their end users.

- ***Grounding agent actions in business context***: Work IQ gives agents real-time understanding of how work happens across the organization by connecting the productivity tools where decisions are made, including Outlook, Teams, and Word, to live operational data in Dynamics 365. Agents see the full context of a disruption, including its impact on orders, inventory, and customer commitments, and act on it directly in the system of record.

- ***Agents operating within business policies and constraints:*** Agents act within defined rules—such as service levels, customer prioritization, and cost thresholds—so decisions remain aligned to business objectives and governance requirements. Additionally, Microsoft Agent 365 gives IT teams one place to observe, govern, and secure agents in your organization.

> "Our partnership with Microsoft has been instrumental in enabling Farmlands' digital transformation. By standardizing on Microsoft Dynamics 365 and thoughtfully applying agentic AI with humans firmly in the loop, we are creating a more efficient, resilient, and scalable operating model."
>
> -Andre Scheepers,
> Chief Digital Officer,
> Farmlands Cooperative

Driving impact with agents from planning to delivery

The impact of an agentic approach is best understood through how work changes across core supply chain processes.

Forecast to plan: Continuous alignment of demand and supply

Demand planning is no longer limited to periodic forecast updates. With Demand planning in Dynamics 365 Supply Chain Management, planners can incorporate external signals—such as changes in demand patterns, promotions, or market conditions—alongside operational data to continuously adjust forecasts and supply plans. Planners can focus on evaluating scenarios and making decisions instead of spending time consolidating data.

Source to pay: From supplier signal to business action

Supplier updates often require immediate analysis—what orders are affected, what production is at risk, and what actions need to be taken. When a supplier flags a component delay, the Procurement Agent in Dynamics 365 Supply Chain Management triages the supplier communication, matches it to the affected purchase order, and summarizes the downstream impact across inventory, sales orders, and production schedules. If inventory is available elsewhere in the network, the agent highlights the option. The procurement lead reviews the recommended response and moves forward spending time on decisions and mitigation, not tracing impacts across systems.

Plan to produce and Inventory to deliver: Adjusting production execution, order fulfillment, and warehouse operations in real time

Changes in material availability, labor capacity, or priorities require constant updates to production schedules and warehouse activities. Agents can help apply these changes directly within operational workflows—supporting updates to schedules, work orders, and task prioritization—so teams can keep operations running without delays often caused by manual coordination. Customer commitments depend on accurate, up-to-date information across inventory, production, and logistics. Dynamics 365 Supply Chain Management connects these data points so teams can ensure that order promising reflects current conditions—reducing the risk of overpromising and enabling earlier communication when changes occur.

> "With Dynamics 365, we gain real-time visibility into our inventory across all locations, empowering faster, data-driven decision making and enhancing our overall operational agility."
>
> -Erdal Arslan, Financial Affairs Group Manager, LC Waikiki

Order to cash: Enabling a smooth end-to-end customer order experience

Whether it is B2B or B2B2B, agentic commerce can connect customers to the right distribution channel, automate and accelerate the purchase experience from quote-to-order and the availability of accurate data increases speed and agility across the supply chain processes.

Service to deliver: Optimizing asset performance and seamless field operations

AI and agents in field service can provide timely updates on asset and work order information and coordinate field technician schedules that in turn improves overall production uptime, efficiency of delivery and customer satisfaction.

Connect with us at the Gartner Supply Chain Symposium

We invite you to engage with our leaders and explore these innovations firsthand during the symposium. Whether you are looking to learn more about the technology or for a strategic conversation on business outcomes, there are several ways to connect:

- ***Our Featured Session***: From Intelligence to Impact: Agentic AI for Faster, Smarter Supply Chains. Join Sameer Verma, Raghav Jandhyala, and Jodi Larson for a deep dive into how organizations are moving from initial AI exploration to achieving impact with agentic supply chain transformation.
- ***Executive Boardroom:*** Join Sameer Verma, Raghav Jandhyala, and your fellow supply chain leaders for a strategic conversation and best practice sharing session where we'll discuss how agentic-based approaches can improve supply chain speed, resilience, and business impact. CSCO Boardroom: Win the Volatility Era: Build a Faster, Agentic Supply Chain.

Also, be sure to visit our booth during expo hours to talk to our experts and experience Dynamics 365 Supply Chain Management in person.

Microsoft | Dynamics 365

Article by Sameer Verma



Paperless Travelers and Traceable Work: The Gold Standard for Manufacturers

Ditch paper travelers. Build digital work and proof your quality trail.

Paper travelers slow decisions, hide mistakes and get lost when you need them most. Going paperless replaces the shuffle with clear, fast transactions tied directly to each work order.

Start with the basics: barcode your items, work orders and locations. Put rugged scanners and label printers where the work happens. Use simple screens to clock on, record scrap and move WIP so every step leaves a trace you can trust. With ERP at the center, every scan updates the job history instantly. Supervisors see where parts are, how long an operation took and whether any nonconforming material was flagged. That visibility cuts the hunting and guessing that eat up shift time. To get a sense of the tools that enable this, review our Paperless application overview. For a deeper dive on the business case, this whitepaper lays out the wins at Break Out of the Paper Prison.

Digital travelers also make handoffs cleaner. When a pallet leaves machining, receiving inspection already has the record. When QA clears it, assembly sees it in queue. The system replaces sticky notes with facts so planners can sequence jobs with confidence. Less chasing means more making.



Article by
Adam Grabowksi
Director Marketing,
Global Shop Solutions

Standardize Work Instructions And Speed Audits With Control

Going paperless gives you stronger process control. Standardize your work instructions and attach them to routings so each operation shows the current revision. Include photos, tool lists, torque specs and quality checkpoints. When a change is approved, release the new version and retire the old one so the floor always sees the latest direction. This is document control that operators actually use.

Audits get easier too. ISO 9001 auditors want to see proof that you follow your process and that your records are controlled. With ERP, you pull up the work order, the linked work instruction revision, the operator who ran the job, and the inspection results in seconds. That traceability speeds the audit and reduces stress.

Finally, digital sign-offs reduce rework. Operators complete checklists, attach photos, and log serial or lot numbers as they go. If a part fails inspection, nonconforming reports launch with one tap. You get clean data for continuous improvement without slowing the line.

Roll Out Change In Phases And Prove Roi Fast

Win fast, then expand. Start paperless where the noise is loudest. Many shops begin with receiving and inventory because mislabeled parts trigger the most fire drills. Next, digitize travelers in machining or fabrication to capture hours and scrap in real time. Then move to assembly where photos and checklists reduce escapes.

> “Paperless is not about shiny tablets. It is about getting the right instruction to the right person at the right time—then keeping the proof.”

Each phase should have clear goals, a champion and training short enough to fit between jobs. Track ROI as you go. Measure time saved finding WIP, paper and printing cost avoided and errors cut by scanning. Share the wins so momentum builds. For examples of how going paperless improves efficiency, this post offers practical steps at Paperless Benefits and our resource hub has more implementation material at ERP Resources.

Paperless is not about shiny tablets. It is about getting the right instruction to the right person at the right time, then keeping the proof. Do that well, and quality improves, audits speed up and the plant gets quieter.

Global Shop SOLUTIONS ERP SOFTWARE



Article by Adam Grabowksi



Closing the Execution Gap in Food, Beverage & Consumer Products with ChampionAI

In the food, beverage, and consumer products industries, disruption isn't an occasional guest; it's a permanent resident. Manufacturers are caught in a vice grip of volatile ingredient supplies, chronic labor shortages, and razor-thin margins.

And while all of that gets talked about a lot, the biggest vulnerability isn't strategy, it's execution.

For decades, manufacturers have invested millions in traditional ERPs that serve as "systems of record." These systems are excellent at recording what should happen. But they struggle with the messy, manual reality of what is happening right now—and what happens next.

The workflows that actually determine agility, procurement follow-up, sourcing pivots, and sales responsiveness still live in the "dark matter" of operations: emails, spreadsheets, and frantic phone calls.

This is where Agentic AI changes the game.

Unlike traditional software that waits for someone to click a button, QAD's ChampionAI uses intelligent agents that live inside your workflows. They don't just store data; they monitor, alert, and act to make sure plans turn into real outcomes on the loading dock.



Article by
Stephen Dombroski,
Director for the Consumer Products and Food & Beverage, QAD

Bridging the Gap Between Plan and Action

ChampionAI closes the execution gap with three specialized agents, each focused on a critical point of friction in the manufacturing lifecycle.

The Procurement Champion manages what happens after a purchase order is issued by ensuring suppliers stay aligned with real-time production needs.

The Sourcing Champion speeds up the RFQ process, helping teams pivot suppliers as quickly as the market shifts.

And the Sales Champion focuses on revenue, turning complex customer requests into accurate, shippable orders without the usual delays.

To see what that actually looks like in the real world, it helps to walk through a few scenarios.

When Procurement Breaks Down

A high-volume producer of canned soups depends on a steady flow of specialized ingredients; things like sodium-lowering additives and specific starches. Because these are tightly managed, safety stock is lean.

Late Friday afternoon, a supplier sends an email: a logistics strike will delay a critical shipment by four days.

In most environments, that email sits untouched until Monday. Production starts as planned, and only hours later does the problem surface when the line shuts down because the ingredient isn't there.

ChampionAI doesn't wait for someone to check their inbox. The Procurement Champion detects the delay, understands its impact on the open purchase order, and flags the risk immediately. It checks alternate supply, and alerts the production scheduler before the week even begins.

Instead of reacting to a shutdown, the team adjusts the schedule ahead of time. The chasing disappears and resilience takes its place.

> "The workflows that actually determine agility… still live in the 'dark matter' of operations: emails, spreadsheets, and frantic phone calls."

When Sourcing Needs to Move Faster

A frozen pizza manufacturer suddenly gets hit with a spike in the cost of IQF red bell peppers due to a crop failure. Margins are at risk, and they need a new supplier; fast.

Traditionally, this means sending out RFQs, collecting inconsistent responses, and manually comparing data across spreadsheets. It takes days just to get to a usable comparison. By then, the best supply is gone.

The Sourcing Champion compresses that entire process. RFQs go out instantly to pre-vetted suppliers. Responses come back standardized. Certifications are automatically identified and matched.

What used to take weeks now happens in days, or even hours. And in a volatile ingredient market, speed is everything.

When Sales Becomes the Bottleneck

A juice manufacturer receives a massive RFQ from a national retailer; 150 lines for a seasonal promotion. The deadline? End of day.

To respond, the sales team has to check inventory, validate pricing, confirm capacity, and ensure contract compliance. Done manually, that process takes days.

So the opportunity is lost but not because the company couldn't deliver, but because it couldn't respond fast enough.

The Sales Champion changes that dynamic. It connects directly to ERP data, maps the request to available SKUs, validates pricing, and flags constraints in real time.

Instead of days, the quote is ready in hours. And in categories where speed wins shelf space, that difference matters.

Where the Real Cost Shows Up

All of these scenarios point to the same issue: friction.

Friction is what slows organizations down. It lives in silos, in disconnected systems, and in manual workarounds that accumulate over time.

Article by Stephen Dombroski

- In procurement, it shows up as shortages and costly expedites.
- In sourcing, it drives higher costs and missed opportunities.
- In sales, it leads to lost revenue and weakened customer trust.

Across food, beverage, and consumer products, these operational gaps create a compounding drag on performance.

ChampionAI doesn't just make things faster, it removes the friction entirely. It turns disconnected actions into a continuous, intelligent flow of execution.

And that fundamentally shifts the organization from reactive to proactive.

What This Means Going Forward

Manual execution doesn't scale anymore. Not in a world where volatility is constant and speed is competitive advantage.

"Manufacturers don't just need better systems of record. They need systems that help them act."

Manufacturers don't just need better systems of record. They need systems that help them act.

That's why companies are turning to ChampionAI. It is time to operationalize data, not just manage it.

At the end of the day, the question is simple:

How much of your potential is being lost to manual friction? If your teams are still chasing data instead of acting on it, you're not just losing time, you're losing margin.

The companies that win won't be the ones with the most data.

They'll be the ones who move that data fastest. The ones who act first and the ones who execute without hesitation.

That's what it means to be a Champion. Are you ready to lead?





Odoo as a solution for Medium and Large Companies

What is MMC?

MMC stands for Mid-Market Corporate and refers to larger companies, particularly those with a workforce of over 250 employees.

At Odoo, MMC is a specialized department comprised of sales teams and consultants dedicated exclusively to this type of company, which has more complex needs and demanding structures.

Although Odoo is widely known as an ideal solution for SMEs, its scope now extends far beyond that: it is also a powerful and perfectly suitable tool for medium and large companies seeking scalability, flexibility, and total control over their processes.

Odoo is easily adaptable to any industry, but the right approach is essential—which is why a department dedicated exclusively to the most complex, larger, and more specialized companies was created. Thus, MMC provides them with a tailored solution that stands the test of time without sacrificing ease of use.



Article by
Jaime Lesmes Carabal,
Marketing Team Leader,
Odoo

Article by Jaime Lesmes Carabal

The MMC Team

Currently, the MMC team handles projects on an international scale, and we are very proud to count prestigious clients such as EXKI, WAVESTONE, Toyota, GiveX, Sodexo, and many more among our portfolio.

Currently, nine offices have MMC teams in place. This means there is a shared global knowledge base across offices and project experience that will benefit everyone equally. While each office adapts its way of working to the specific characteristics of its local market, there is a common knowledge base that is shared and evolves collectively. This ensures consistency in methodology while maintaining the flexibility needed to respond to the specific needs of each region.

This team dedicated to medium and large enterprises has its own sales and implementation processes. Since these are larger companies with more complex workflows, the pre-sales process is longer, as is the implementation process.

During the pre-sales phase, we proceed with a data collection and product validation process using customized demos of the solution to be implemented, involving not only the sales representatives on the project but also specialized consultants and developers who are engaged from the very beginning in developing the implementation plan.

We conduct a thorough study and analysis of the company, covering all aspects of its operations, including projects, workflows, current tools, and more. Once we understand how the business operates, we prepare a proposal for implementing Odoo.

We are accustomed to receiving requests for proposals in various formats (RFI, RFP, RFQ, or lists of requirements), which helps us understand each client's needs and prepare the corresponding estimates.

Once the project approach is defined, we conduct an initial consultancy or gap analysis, aimed at putting ourselves in the shoes of the client and their employees to propose solutions and ideas tailored to each need.

The deliverable includes key information for decision-makers: timelines, budget, and risks associated with the project. This allows the client to anticipate every aspect of the implementation and avoid surprises.

The implementation takes place in several phases, during which the client has access at all times to the tasks related to the project, allowing them to validate and test the solution in real time.

> "Although Odoo is widely known as an ideal solution for SMEs, its scope now extends far beyond that… it is also a powerful and perfectly suitable tool for medium and large companies."

Why is an MMC team necessary?

In Odoo, the goal is always to implement the system as simply as possible. This is where the Quickstart methodology comes in: it allows Odoo to be implemented in companies in phases, starting with the most critical areas and addressing the most basic needs first. Once this initial phase is up and running, the necessary improvements are made to ensure the software functions as effectively as possible.

However, when we began working with large enterprises, we realized a new approach was needed. More people were involved, processes required more refinement, and more time was needed before configurations could be deployed to production.

Thus, the team specializing in large companies developed a new way to implement Odoo, with a more defined pre-sales process, including more phases and studies of the market, the company, and the Odoo proposal.

Why Are Medium and Large Companies Choosing Odoo?

Having a dedicated team to manage large companies isn't the only thing needed to handle these types of projects; the product itself must be up to the task. Thanks to Odoo's nature, it's easier to carry out these more complex projects.

Open Source Model and Flexibility:

Odoo is based on an open-source model, which fosters a global community of developers that constantly enriches the core of the system. This ensures that the product is not a "black box," but rather an adaptable entity that avoids vendor lock-in and allows for deep customization for any industry.

"This ensures that the product is not a 'black box,' but rather an adaptable entity that avoids vendor lock-in and allows for deep customization for any industry."

Our DNA:

Odoo's architecture is divided into three distinct pillars that ensure scalability and a seamless user experience:

- Back-end: Built on Python, enabling agile development and a powerful ORM (Object-Relational Mapping) for managing business logic
- Database: Uses PostgreSQL, the gold standard in relational database management systems due to its reliability
- Front-end: Uses JavaScript for dynamic interfaces, enabling efficient DOM manipulation and immediate user response

Odoo.sh: Operations environment:

To close the software lifecycle, Odoo.sh offers a cloud deployment platform (PaaS) that integrates:

- Version control: Native Git management to facilitate collaboration.
- Automation: Simplifies critical tasks such as backups, updates, and the management of test or staging instances
- Vibe Coding (The Future): By the end of the year, it will integrate AI (Claude Code) to allow the system to write and deploy custom code based solely on your instructions, turning ideas into real features in minutes.

In conclusion, Odoo is indeed software for large enterprises; the product is designed for this purpose, and the company has the necessary resources to carry out implementations and help large businesses achieve a scalable, user-friendly system tailored to their needs.



Article by Jaime Lesmes Carabal



AI in manufacturing: Building resilience for a disruptive world

Manufacturing leaders aren't dealing with one challenge. They're managing several at once.

Geopolitical uncertainty is reshaping trade flows and supplier networks. Supply chains remain unpredictable, while ESG and sustainability expectations continue to rise. Legacy operational technology and production systems are being pushed beyond what they were designed for, exposing new cyber and operational risks. At the same time, experienced workers are retiring, taking critical process and operational knowledge with them, leaving organizations to close growing capability gaps.

For many organizations, this can feel like a constant game of catch-up—adjusting plans, responding to disruptions and trying to keep operations stable.

But reacting isn't enough anymore. Manufacturing leaders are starting to design operations that can handle disruption from the outset. The priority is shifting toward resilient operations that can absorb shocks, support growth aligned with ESG goals and respond faster to changes in demand.

Increasingly, AI is playing a key role here—not as a standalone solution, but as part of how teams plan, monitor and act across the value chain.



Article by
Magali Amiel,
Director, Global Industry Lead,
Manufacturing
CGI

Resilience by design starts with unified visibility

When teams talk about improving forecast accuracy and planning capacity, the first question often is: Which data points matter most?

The most significant gains don't come from accumulating more data. They come from connecting the right signals and using them in context.

Manufacturers today need a clear view across multiple fronts. Customers expect hyper-personalized products, shorter lead times and visible ESG and sustainability commitments. Employees expect intuitive digital experiences that match their experiences as consumers. And partners across complex ecosystems expect trust, transparency and reliable, secure data exchange.

Forecast and planning accuracy improves when organizations stop chasing volume and focus on decision-grade data. Leading indicators matter far more than lagging KPIs.

- Internally, this includes demand signals such as order patterns and volatility; supply signals such as supplier lead times and capacity constraints; and operational signals like asset availability, maintenance status, labor constraints and yield.
- Externally, geopolitical risks, weather events, energy availability and logistics congestion shape outcomes.

Connecting these signals changes how teams respond. When demand signals are viewed alongside real constraints, teams can see issues earlier and respond with options.

Our experience shows that real value comes from linking the right signals across the ecosystem and using AI to turn them into early warnings, rather than after-the-fact analysis.

"The most significant gains don't come from accumulating more data. They come from connecting the right signals and using them in context."

Scenario planning: From the "right plan" to making better trade-offs

When disruption hits, planning quickly becomes a balancing act.

- Do you protect service levels or reduce inventory?
- Do you prioritize speed or manage cost?

Traditional planning tends to treat these as separate decisions. In reality, they're connected.

AI helps bring those trade-offs into the open. It allows teams to test different scenarios—what happens if demands spikes, if a supplier fails to deliver or if lead times stretch—and see the impact of decisions across service, cost and risk at the same time.

For this to work, teams need clear guardrails upfront: minimum service levels, maximum working capital exposure and acceptable risk thresholds. AI does not replace decision-makers. It helps surface the consequences of choices early and clearly.

This shift changes the conversation from "What is the right plan?" to "Which trade-off are we willing to make?"

In a crisis, speed and alignment matter more than theoretical accuracy. AI enables teams to rapidly model the impacts of disruption, compare alternatives, and act based on risk appetite rather than intuition.

For a deeper look at how teams are tackling more complex supply chain decisions, this blog from my colleagues, "Optimization, generative AI and quantum - Making complex supply chain decisions faster and more accessible," explores how these approaches come together in practice:

Smarter sourcing: Where AI delivers fast, and lasting value

Sourcing today is becoming more data-driven, not in theory, but in practical, day-to-day operations.

AI is delivering some of the fastest results in procurement, especially where decisions are frequent, rules-based and supported by existing data. This is particularly true in intake-to-pay processes and in compliance and risk sensing.

These are operational areas where impact shows up quickly. AI helps reduce cycle times, cut errors and ease manual effort through

capabilities like natural-language intake, automated classification, intelligent approval routing and invoice anomaly detection.

AI also improves spend classification and visibility by normalizing data across ERP and procurement systems and highlighting leakage in near-real time. At the same time, continuous risk monitoring scans suppliers and sub-tiers for early signals related to financial stress, geopolitical exposure, lead-time variability and ESG compliance issues.

In many cases, teams describe this as "found money"—value that was already there but hard to see.

Supplier discovery is another area that benefits significantly, especially in constrained categories or high-risk regions. AI can rapidly scan long-tail suppliers, match capabilities, pre-screen for risk and ESG criteria, and generate shortlists in days instead of months.

Quick wins matter, but leadership looks at long-term value.

Blending AI, ESG and human judgment

Effective decision-making relies on clearly defined roles. Buyers provide context, policy sets the boundaries, and AI offers recommendations. AI should support decisions, not act as an automated gatekeeper.

AI can continuously score and monitor risk and ESG indicators, while buyers interpret context, manage relationships and override recommendations where necessary. Policy defines thresholds, escalation rules and governance.

Initiatives such as Catena-X and the Digital Product Passports, demonstrate how federated data ecosystems support trust, end-to-end supply chain visibility, ESG traceability and compliance reporting—all while keeping accountability with people.

From pilot to production: Making AI part of everyday work

AI scales when it delivers value in daily work, not when models are technically impressive.

The most successful organizations start with use cases that solve real problems and fit within existing workflows—for instance, supplier discovery, demand forecasting, lead-time prediction, risk sensing, and inventory optimization.

They also define success upfront, as business outcomes:

- Fewer disruptions
- Improved on-time delivery
- Shorter lead times
- Lower total cost of ownership
- Reduced inventory buffers without increasing service risk.

Executives are no longer asking whether to use AI; they are asking how it protects revenue, margins and continuity.

Embedding AI for long-term success requires three conditions:

1. AI is integrated into core systems such as ERP, planning and sourcing systems.
2. Decision ownership is clear. AI delivers speed and consistency. Humans own judgment and exceptions.
3. Feedback loops improve model performance over time.

Governance as an enabler, not a barrier

There is a common concern that governance slows down AI. In practice, the opposite is true.

When governance is clear—who own what, how models are monitored and how decisions are traced—organizations move faster because they avoid rework and build trust early.

AI in manufacturing is becoming part of core operations, and like any critical capability, it needs the right structure around it. This includes clear ownership, secure deployment, explainability, and human oversight at key points.

Trust doesn't come from the model itself; it comes from how it is used.

Looking ahead

Over the next decade, disruption will remain constant in manufacturing. What will change is how prepared organizations are to respond.

The manufacturers that move forward will be the ones that treat AI, data, and emerging technologies as levers for renewal, not just incremental improvement. They'll focus on unifying their foundations, scaling AI responsibly and staying ready for what comes next. The result will be stronger customer value, more resilient ecosystems and growth that lasts.

If you're looking to explore how AI can strengthen resilience in your manufacturing operations, I'd be glad to connect for a discussion.

CGI



Introducing Epicor Prism Developer for Application Studio: Accelerate ERP Customizations with AI

ERP customizations are essential, but they can also slow down your business. From new requirements to evolving workflows, even small changes can take time, specialized skills, and careful testing. Epicor Prism Developer for Application Studio changes that. Built directly into Kinetic Application Studio, it uses AI to generate customization components from natural language—helping your team move faster, reduce manual effort, and focus on delivering value.

Deliver Customizations Faster—Without the Manual Effort

Reduce development time and accelerate how quickly your business can respond to change.

- Move from manual builds to AI-assisted generation—cutting customization time from hours to minutes
- Reduce repetitive development work and speed up idea-to-deployment cycles
- Generate events, data views, rules, and UI components using natural language prompts



Article by
Ellen Cox
Sr. Product Marketing Manager, AI, Epicor

Epicor Prism Developer helps your team focus less on building from scratch and more on delivering outcomes.

Move Faster with Confidence and Control

Accelerate customization work while maintaining full visibility and control over every change.

- Preview and validate AI-generated customization plans before merging
- Reduce risk of errors, rework, or unintended downstream impact
- Review generated events, rules, and UI updates directly within Application Studio

With a human-in-the-loop approach, your team stays in control—while moving significantly faster.

EPICOR

> "Move from manual builds to AI-assisted generation—cutting customization time from hours to minutes."

Do More with the Team You Already Have

Reduce slowdowns and so your team can focus on higher-value customization work.

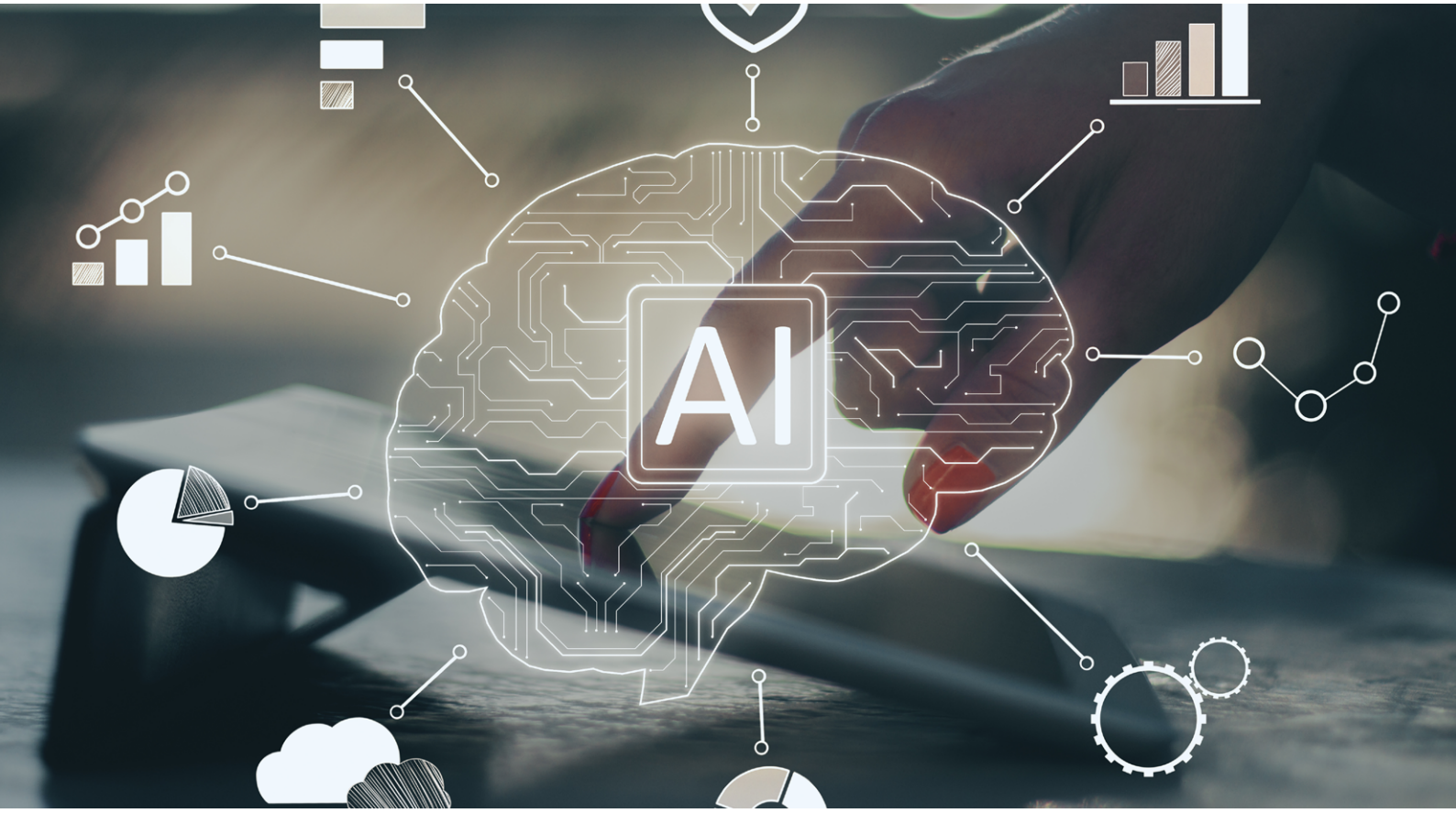
- Help developers and Application Studio users complete basic customization tasks more efficiently
- Reduce bottlenecks caused by limited developer capacity or lengthy backlogs
- Support multi-step customization generation to simplify complex workflows

Prism Developer helps you scale customization work without adding headcount.

Availability & Requirements

Epicor Prism Developer for Application Studio is available for:

- Epicor Kinetic Cloud customers (version 25.1.12+)
- Customers with an Epicor Prism license
- Users with customization or dashboard developer access





Salesforce Launches Agentforce Operations to End Back-Office Bottlenecks

Slow, manual back-office processes break customer experiences and hold companies back. Agentforce Operations solves this problem by making every process fast, accurate, and automated.

Specialized back-office agents autonomously perform work across disconnected systems from email to ERP, cut cycle times by up to 70% for processes like auditing and onboarding, eliminate 80% of manual tasks like data entry, and deliver audit-ready outcomes at scale.

Workflow automation has long existed, but legacy platforms rely on IT, break at system boundaries, and route work only to people. Agentforce Operations changes that with agents that complete work across systems — accelerating outcomes, not just handoffs.

Proven in the world's most complex supply chains, Agentforce Operations now brings agentic process automation to every industry — without ripping and replacing existing systems.

ACompanies use agents to make their customer and employee experiences faster and more personalized. But when these fast, modern experiences hit a web of outdated, manual back-office processes, everything stops. Employees are stuck switching between systems, pasting data into spreadsheets, and hunting for updates in email. What should take hours takes days or weeks — slowing productivity, delaying revenue, raising costs, and putting commitments at risk.

Today, Salesforce is introducing Agentforce Operations, a solution that takes outdated, manual back-office processes and turns them into a clear set of tasks so that specialized agents can do the work for you — process coordination, verifying data, clearing compliance, hunting down approvals, and more. The payoff: cycle times reduced by 50 to 70%, better accuracy with manual data entry slashed by 80%, visibility across the business, and ultimately better experiences.

"As companies accelerate AI adoption to become Agentic Enterprises, most are still burdened by an underlying layer of fragmented, manual processes across supply chain, procurement, finance, and the broader back office. This quietly slows operations, increases costs, and limits growth. With Agentforce Operations, we're not just digitizing those processes but rethinking them for the AI-first world, optimizing how agents and humans work together." – Aman Naimat, SVP & GM, Agentforce Operations

Agentforce Operations extends AI agents from front-office experiences into the processes and systems that run the business — enabling end-to-end agentic execution across the back office. Here's what it looks like:

Press Release from Salesforce

- For a manufacturer, a custom deal is closed and ready to be built and delivered. With Agentforce Operations, agents orchestrate the end-to-end fulfillment process behind the scenes — checking inventory, coordinating across teams and suppliers, managing approvals across systems, and proactively triggering Field Service workflows to schedule on-site installation — delivering the product on time and giving the sales rep a head start on the next deal.

- For a bank, a customer submits a loan application and expects a fast decision. With Agentforce Operations, agents manage the end-to-end underwriting process — extracting data from tax returns, chasing missing signatures, and validating every detail against compliance rules across systems — so loan officers can focus on the customer instead of on paperwork.

- For an insurer, a customer submits a claim and expects a fast, fair resolution. With Agentforce Operations, agents coordinate the claims intake and validation process behind the scenes — verifying details, following up on missing information, and assembling a complete, "in-good-order" file — accelerating claim handling and accuracy while preventing downstream delays.

- For an employee service agent, an employee submits a request for application access and expects an immediate outcome. With Agentforce Operations, Agentforce IT Service agents perform the end-to-end fulfillment process behind the scenes — orchestrating multiple AI agents, verifying identity, confirming permissions, and provisioning access across third-party apps, services, and systems — so the employee receives real-time resolution, and human IT agents can focus on high-value work.

How it Works: From Messy and Manual to Structured and Automated

Workflow automation has been around for years. But most legacy platforms were built to coordinate steps, not to complete complex work end to end. They can route tasks, manage approvals, and improve visibility — yet when work depends on unstructured information, spans systems, and changes constantly, teams still end up relying on people and technical specialists to keep operations moving. The result: brittle automation that breaks at system boundaries, bottlenecks that slow things down, and failure to scale.

Agentforce Operations introduces a new model for back-office execution: AI agents that do more than orchestrate work — they complete it, adapt as the business changes, and coordinate with people only when needed. The result: end-to-end processes that run faster, require less manual intervention, and stay accurate and auditable as they evolve.

1) Intelligent Operations

Agentforce Operations coordinates tasks, timelines, and logistics between AI agents that autonomously execute work and humans when needed.

- Specialized Agents autonomously complete busy work like extracting data from complex documents, running computations, updating credit models, and identifying compliance gaps. What once took a team of auditors four hours now takes an AI agent minutes — delivering consistent, high-quality results with a complete audit trail.

- Seamless Adoption: People continue working within their existing tools while AI agents keep processes moving in the background. Whether you're a client, employee, broker, or supplier, you can engage with tasks directly from email — as well as Slack and Microsoft Teams — both in June.

- Accurate Outcomes at Scale: Mission-critical processes need to be right every single time. By combining LLM reasoning with your business rules, agents interpret complex, unorganized information and then finish each step exactly how you need them to — delivering precise, audit-ready results at scale

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2) Instant Blueprints

Agents and humans need one clear set of instructions to work together, but converting messy process documents or whiteboard drawings into a working system takes months of coding. Agentforce Operations turns unstructured documents or diagrams into "digital blueprints" in minutes. Or you can use over 30 out-of-the-box blueprints for common jobs like invoice auditing, onboarding, and PO rescheduling, with more coming soon.

3) Adaptive, Transparent, and Always Improving

Most automated processes fail because changing them requires an army of developers. With Agentforce Operations, business leaders can make their own changes.

- Plain Language Updates: If a new regulation drops, a manager can update the entire operation by simply describing the change in an email; then it gets updated.

- The "Anti-Bottleneck" Engine: Agents proactively flag delays — like a three-day lag in signatures — and suggest fixes before they impact the client.

- Radical Transparency: Every AI action is recorded and mapped back to the digital blueprint, providing a permanent audit trail. Instead of digging through files months later to find a mistake, you have a live safety net that keeps your business organized and audit-ready.

Proven Success

Agentforce Operations is built on Regrello technology from Salesforce, which has transformed the world's most demanding supply chains — reducing cycle times, eliminating manual coordination, and improving visibility across complex operations.

"Scaling to meet growth without the massive overhead of traditional hiring is a major challenge with workforce orchestration across the front and back-office. Salesforce has enhanced our infrastructure and helped us deploy Teddy, our AI agent that works autonomously alongside our human team to handle over 1,000 leads per week. Teddy has helped us achieve a 427% increase in prospect engagement and $1.5M in cost savings, allowing us to operate like a company ten times our size. With automated lead qualification and scheduling taking place in a single platform, we're reducing manual bottlenecks and letting our teams focus on building strong customer relationships." – Brandon Metcalf, CEO & Founder, Asymbl

"The rapid maturation of agentic capabilities has created a significant opportunity for financial services companies to utilize these emerging technologies to enhance their underlying business processes and unlock new sources of value through greater efficiency, smarter decision-making, stronger compliance, and more personalized customer experiences at scale." – Nigel Bell, Managing Director, Deloitte Consulting LLP

"In the luxury lifestyle industry, response time is critical to maintaining a premium experience across our 116 fitness clubs. With Agentforce, we've deployed QUIN, a lead-nurturing agent that manages prospects and answers questions outside of standard business hours. QUIN seamlessly connects leads with our sales team and directly accesses team members' calendars to provide accurate availability. With 24/7 connectivity, we've eliminated the engagement gaps that once slowed down our sales pipeline, delivering an elevated, personalized experience at scale across front and back-office touchpoints." – Melanie Kalia, Director, Product Management, Equinox

"Agentforce Operations is powering the next frontier of the Agentic Enterprise. It's a truly AI-native, enterprise-ready platform that delivers real business outcomes, enabling intelligent apps and autonomous operations by orchestrating humans and agents in one system. As Customer Zero, Salesforce has already proven its impact, replacing traditional BPO models. We're proud to lead the first financial services (consumer lending) implementation, accelerating this transformation and unlocking new value." – Sean Catlin, EVP, Global Head of Strategy, OSF Digital

"Salesforce's introduction of Agentforce Operations marks an important step forward in bringing AI-driven automation to the back office. Together, we're helping clients use Agentforce to transform manual operations into intelligent workflows — from AI-powered contact centers to automated onboarding and compliance — driving faster execution, greater accuracy, and more seamless experiences." – Ian Kahn, Principal, Commercial & Service Excellence Platform Leader, PwC US

"Following a decade of growth, our primary challenge was the collection of legacy systems that kept our teams and customer data isolated. With the Agentforce 360 Platform, we have been able to leverage a unified, real-time view of customer profiles across front-end and back-end systems. Thanks to the power of AI agents and automation, we are giving our teams the time back to focus on more strategic, high-value work." – Andrew Allan, Chief of Global Finance Operations & Technology, Siemens Digital Industries Software

Availability

- Agentforce Operations is generally available today.
- Ecosystem integration features, including the ability to auto-sync data and trigger actions with Salesforce Flows, are expected to enter Beta in May 2026.



Premier Construction Software Partners with Quickly to Automate Early Payments in Construction

Premier Construction Software, the global leader in cloud ERP solutions for the construction industry, announces a strategic partnership with Quickly, an early payment platform built for the construction sector. The partnership integrates Quickly's automated early payment capabilities directly into Premier's cloud ERP, giving construction companies a new way to reduce payables costs, improve cash flow, and pay their suppliers faster. The solution is offered at no cost to customers, with savings shared when early payments are used.

Suppliers in construction routinely wait 30 to 90 days to get paid. That delay strains vendor relationships, creates manual work for finance teams, and can slow down project execution and reinvestment. Through this partnership, Premier and Quickly are bringing automated early payment capabilities to construction companies, allowing buyers to offer early payment on approved invoices at a discount while suppliers get faster access to the capital they need to keep projects on schedule.

"Our clients told us they wanted a smarter way to handle vendor payments without adding complexity to their operations. Quickly fits that need. The integration works inside the workflows our clients already use, and it turns approved payables into a savings opportunity. No new systems to learn, no disruption to existing payment terms."

— Aisha Ali, President, Premier Construction Software

"Construction has operated on rigid payment cycles for decades. By partnering with Premier Construction Software, we're embedding dynamic early payments directly into their platform, giving customers a practical way to reduce supplier costs and improve margins without changing how they operate or their existing payment terms. There is no cost to adopt, and customers can choose to use it whenever it makes sense."
— Kyle Friedman, CEO & Co-Founder, Quickly Technologies

Modernizing Payments in Construction

Premier's AI-powered cloud ERP already gives construction companies real-time visibility into job costs, project budgets, and financial performance. Adding Quickly's early payment infrastructure extends that visibility into the payables process, connecting approved invoices to automated discount capture and cost savings. For contractors managing large vendor networks across multiple active projects, this means fewer manual payment requests, stronger supplier retention, a more predictable cash position and incremental savings across payables.

About Premier Construction Software

Founded in 2009, Premier Construction Software operates on a global scale with offices across North America, Australia/New Zealand, and the MENA region. Premier specializes in financial construction software, delivering a unified platform that integrates financial management, project execution, field operations, and AI-driven technology to help clients achieve operational excellence and scalability.

Premier Construction Software is a subsidiary of Constellation Software Inc., a global leader in delivering specialized, mission-critical software solutions for both public and private sectors.

About Quickly

Quickly Technologies Inc. is an early payment platform that enables businesses to reduce payables costs while giving suppliers faster access to capital. By embedding dynamic early payment options directly into existing accounting workflows, Quickly allows customers to offer early payments on approved invoices with no cost to adopt. The platform is used by over 2,000 companies across North America, helping businesses improve cash flow, strengthen supplier relationships, and unlock savings.

PREMIER
CONSTRUCTION SOFTWARE





Hensel Phelps Modernizes on SAP Cloud ERP, Harnessing Syntax's Agentic AI and Construction Expertise

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Syntax, a leading global technology solutions provider driving enterprise transformation in the cloud, announced that Hensel Phelps, one of the largest employee-owned general contractors in the United States, has partnered with Syntax to support its move to SAP Cloud ERP Private. The engagement draws on Syntax's deep engineering, construction, and operations (EC&O) industry expertise, proven SAP cloud implementation capabilities, and the Syntax AI CodeGenie Suite to simplify Hensel Phelps's path to the cloud.

Hensel Phelps, like many construction enterprises, required the ability to scale, adapt, and respond to the demands of a rapidly growing business and position the company to support the adoption of advanced technologies like AI. To modernize its enterprise foundation, the company selected SAP Cloud ERP Private—SAP's intelligent cloud ERP, purpose-built to connect finance, operations, and project delivery on a single platform.

Hensel Phelps chose Syntax as its implementation partner for its deep EC&O industry knowledge and proven SAP delivery expertise, ensuring a best-practice solution that aligns with the company's business processes. As the implementation progressed, Syntax deployed the Syntax AI CodeGenie Suite, putting agentic AI to work on one of the most complex and time-intensive phases of any SAP implementation: custom development.

"We needed a partner who combines deep SAP knowledge with a genuine understanding of how construction businesses operate," said Dolores Mears, CIO at Hensel Phelps. "Syntax brings both—and the AI capabilities Syntax and our internal teams have brought to the project are significantly improving how efficiently we're able to execute our SAP cloud transformation."

Agentic AI Meets Construction-Grade SAP Expertise

Central to the engagement is Syntax AI CodeGenie Suite, a purpose-built agentic development suite that transforms how SAP implementations and migrations are delivered. Working autonomously, CodeGenie Suite's development agent ingests Hensel Phelps's construction-specific requirements and converts them directly into validated technical specifications and clean core-compliant code—eliminating the manual handoffs between requirements, specification, and code development that have traditionally slowed migration projects. The result is faster, more consistent delivery without compromising quality or SAP clean core compliance.

The Hensel Phelps engagement is the latest example of Syntax's commitment to reshaping what enterprise SAP delivery looks like for the construction industry. As EC&O organizations face growing pressure to modernize mission-critical systems, accelerate timelines, and maintain compliance, Syntax's combination of sector depth and AI-native tooling offers a differentiated path to the cloud.

"Hensel Phelps is a leader in the construction industry, and their move to SAP Cloud ERP reflects a clear vision for what it takes to stay ahead," said Luc Dubois, Chief Operating Officer, SAP Delivery at Syntax. "Syntax is deeply committed to the EC&O sector, and we bring that commitment together with proven delivery expertise and AI-driven innovation to help construction enterprises not just move to the cloud, but emerge from that journey with more agile, competitive businesses."

To learn more, visit Syntax's EC&O Industry Solutions page.

SYNTAX

About Hensel Phelps

Founded in 1937, Hensel Phelps specializes in real estate development, construction and facility services. As one of the largest employee-owned general contractors in the United States, Hensel Phelps is driven to deliver EXCELLENCE in all we do. This vision, plus our core values of Ownership, Integrity, Builder, Diversity and Community, define our culture and guide us as we bring our clients' projects to life. Our comprehensive approach begins with innovative planning and extends throughout the entire life of the property. For more information, please visit www.henselphelps.com.

About Syntax

Syntax is a leading global technology solutions provider driving enterprise transformation in the cloud. We help organizations modernize mission-critical applications through AI-enabled innovation, industry-tailored outcomes, and end-to-end solutions across strategic advisory, implementation, and managed services. Through our Boutique @ Scale approach, we tailor every engagement to our customers' priorities, blending boutique-level agility and care with the reach and resilience of a global enterprise. Supported by strategic partnerships with SAP, Oracle, AWS, Microsoft, and other technology leaders, we empower customers to scale faster, work smarter, and build for what's next. Learn more at www.syntax.com.



NetSuite Brings AI-Powered Speed and Precision to SuiteCloud Development

New SuiteCloud Agent Skills enable developers to build, review, and deploy customizations faster using natural language and AI coding agents

Oracle NetSuite, the #1 AI cloud ERP, today announced new NetSuite knowledge packages for AI coding agents that will help customers and partners accelerate and de-risk the creation of NetSuite applications and customizations. The new NetSuite SuiteCloud Agent Skills will make it easier for developers to create customized vertical and industry-specific applications by giving AI coding assistants a better understanding of the conventions, patterns, and best practices in SuiteCloud - NetSuite's standards-based AI extensibility and customization platform.

"Data is only powerful when it can be acted on quickly and safely," said Brian Chess, senior vice president of AI, Product, and Technology, Oracle NetSuite. "With SuiteCloud Agent Skills, our customers and partners can transform how they extend NetSuite and move from lengthy, error-prone coding cycles to AI-assisted development that is fast, secure, and consistent."

As the first ERP platform to leverage the agentskills.io open standard, SuiteCloud Agent Skills enable customers and partners to accelerate and simplify NetSuite customizations and extensions by introducing SuiteCloud development guidance across more than 25 AI coding platforms. With SuiteCloud Agent Skills, developers can build, review, and deploy SuiteCloud changes in natural language using popular AI coding agents, AI-enabled tools, and SuiteCloud Developer Assistant. The new SuiteCloud Agent Skills include:

- ***User Interface Framework References Skill:*** Helps developers deliver NetSuite-compliant user experiences and avoid costly rework by supplying exact specifications for 60-plus interface components and insights from real-world issues to help avoid common pitfalls

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- ***Permissions References Skill:*** Helps developers deploy secure, error-free configurations by providing a validated catalog of 684 precise permission codes that help ensure users only have the access they need, in line with least-privilege security practices.
- ***SuiteScript References Skill:*** Helps developers save time and increase SuiteScript code quality by providing the correct field IDs, names, types, and required status without manual lookups.
- ***Documentation Practices Skill:*** Helps developers produce consistent, professional project docs by auto-generating README, ARCHITECTURE, and API files from code analysis.
- ***Open Worldwide Application Security Project (OWASP) Security Reference Skill***: Helps developers embed robust security from the start by delivering NetSuite-specific OWASP security guidance as code is written.
- ***SuiteScript Conversion Skill:*** Helps developers improve efficiency and migrate from legacy v1.0 scripts to v2.1 in hours instead of days by mapping every API, restructuring entry points, and generating a validation report.

Availability

User Interface Framework References and Permissions References skills are available now to customers globally. The additional skills will be available in Github soon.

About Oracle NetSuite

For more than 25 years, Oracle NetSuite has helped organizations of all sizes reach their goals faster and more efficiently. NetSuite provides an integrated business system with embedded AI that delivers powerful financial management, supply chain, customer experience, and HR capabilities. Relied on by more than 43,000 customers in 220 countries and dependent territories, NetSuite is the #1 AI cloud enterprise resource planning (ERP) solution.





Rootstock Software Launches Rootstock Ready: An Accelerated Path to Business Outcomes for Midmarket Manufacturers and Distributors

New offering includes a core ERP solution and a rapid, outcomes-driven implementation approach, built with deep industry expertise and guided by proven templates

Rootstock Software introduced Rootstock Ready, a curated ERP solution and implementation model built to help midmarket manufacturers and distributors achieve desired business outcomes faster. Developed by seasoned practitioners with an average of 20 years of industry experience, Rootstock Ready combines a core Rootstock ERP solution with template-based configuration to deliver a rapid path to go-live — and a durable engine for ongoing growth.

"Rootstock Ready represents a dramatic departure from the way manufacturers and distributors have traditionally approached ERP," said Caroline Marty, SVP of Global Professional Services & Enablement at Rootstock. "In the past, this journey was beset with unpredictable costs, timelines, and scope. Rootstock Ready brings expertise from our most seasoned practitioners as well as years of implementation experience into a structured model. As a result, customers gain clarity and confidence from day one — and a faster path to the outcomes they've set out to achieve."

Manufacturers and distributors have long faced a difficult tradeoff when selecting ERP solutions: adopt a powerful enterprise system with a long and complex implementation process or choose a simpler solution that is easier to deploy but lacks the product depth to support future growth.

"Rootstock Ready is designed to bridge the gap, providing an accessible way to implement our enterprise-grade ERP with a curated feature-set honed by our industry experts," said Ohad Idan, Vice President of Product at Rootstock. "Companies gain access to the world's leading business cloud platform with its agentic AI capabilities. As a result, they can unify sales, operations, and service data for enhanced decisions. Starting with a focused scope, customers can expand into more capabilities over time, with the foundation in place to instantly activate AI once their organization is ready."

Organizations adopting Rootstock Ready benefit from:

- Faster, lower-cost ERP implementation. A focused, template-based approach honed from deep industry expertise helps to significantly reduce implementation time, cost, and complexity.
- Fixed-fee model. A predictable, clearly defined investment that organizations can confidently bring to leadership for approval.
- A simplified, manageable entry into ERP. Companies implement the core capabilities they need to go-live quickly, within a clearly defined scope and aligned with their current business requirements.
- A ready-to-operate system at go-live. Built-in change management and training mean organizations begin running key processes immediately at go-live—and continue using and honing the system to its full potential long after launch.
- A scalable path forward. Customers can expand into additional capabilities over time as their operations evolve, without needing to implement a new system.

Based on prior implementation experience and early analysis, Rootstock Ready is projected to deliver up to 3x faster time-to-value, along with reductions in implementation complexity and cost. Central to Rootstock's model is an agentic implementation framework designed to further support and accelerate customer outcomes.

By combining a core ERP feature-set and a template-based path to implementation, Rootstock Ready will also give partners and resellers a faster, more accessible path to sales and implementation.

To learn more, visit the Rootstock Ready page or connect with the Rootstock team.

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





Rauma Marine Constructions selects IFS Cloud to power next phase of shipbuilding innovation

Finnish shipbuilder deploys IFS Cloud to improve project visibility, shorten vessel build times, and strengthen control across complex naval and icebreaker programs

IFS, the leading provider of Industrial AI software, today announced that Rauma Marine Constructions (RMC), a Finnish shipbuilding company delivering advanced vessels to customers worldwide, has selected IFS Cloud to modernize its digital foundation and strengthen control across its complex shipbuilding programs.

Based in Rauma, Finland, RMC is one of the few shipyards globally capable of building icebreakers and advanced naval vessels. The company is currently constructing two icebreakers for the U.S. Coast Guard and four Pohjanmaa-class multi-purpose corvettes for the Finnish Navy, among the most capable ships operating in the region. To support the icebreaker construction, as well as future vessels, RMC will deploy IFS Cloud to provide the digital backbone needed to standardize operations and strengthen oversight across its shipbuilding projects.

Shipbuilding projects involve thousands of components, multiple subcontractors, and continuous engineering changes over multi-year timelines. IFS Cloud will support RMC with a unified platform connecting project management, procurement, production, logistics, commissioning, and financial control across current and future shipbuilding programs. Reinforcing RMC's commitment to excellence in delivering vessels of exceptional quality, the platform will give RMC improved visibility into project progress, supplier commitments, material logistics, and cost forecasting. By integrating operational and financial data within a single system, the shipyard aims to improve decision-making during project execution and strengthen control across long-duration programs. This will enable earlier detection of project deviations, more accurate forecasting, and stronger lifecycle traceability for vessels delivered to both commercial and defense customers.

Heikki Helen, ICT Manager at Rauma Marine Constructions, said: "With IFS Cloud, we gain the ability to drill into production issues in real time and manage projects proactively. Our ambition is to shorten vessel build times. A reduction of build times has a significant impact on productivity and competitiveness, and IFS Cloud supports us in achieving that."



"Shipbuilding represents one of the most complex project-based environments in the world," said Mattias Bolander, Managing Director, Nordics at IFS. "Rauma Marine Constructions combines Finland's deep expertise in icebreaker construction with ambitious growth plans in naval and commercial shipbuilding. With IFS Cloud and IFS's roadmap for embedded Industrial AI capabilities within the IFS Cloud platform, RMC gains a digital platform purpose-built for asset- and project-intensive industries—enabling greater operational transparency, more accurate forecasting, and the ability to proactively manage risk across complex shipbuilding programs."

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 which manufacture goods, maintain complex assets, and manage service-focused operations to unlock the transformative power of Industrial AI™ to enhance productivity, efficiency, and sustainability. IFS's AI-powered platform is fully composable, designed for ultimate flexibility and adaptability to a customer's specific requirements and business evolution. IFS technology leverages AI, machine learning, real-time data and analytics to empower our customers to make informed strategic decisions and excel at their Moment of Service™. 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 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 recognized worldwide for delivering value and supporting strategic transformations. We are the most recommended supplier in our sector. Visit ifs.com to learn why.



Powered by Acumatica Manufacturing, Venture Engineering Drives Full Speed Ahead

20,000+	**50+**	**Single**
parts managed in real-time	projects fully tracked	connected system
improved accuracy	improved profitability	streamlined operations

Three veteran motorsport executives launched an engineering company making parts and equipment for Formula 1 race car teams in 2015. A decade later, the UK-based team operates in 10 times its initial space, has diversified into new markets, and competes with its own race team. After initially struggling with QuickBooks, manually managing spreadsheets, and lacking data visibility, Venture Engineering deployed Acumatica Manufacturing Edition. The modern ERP streamlined operations, delivered real-time project and part traceability, and provided clients full visibility into their projects, which sets Venture ahead of its competitors.

KEY RESULTS

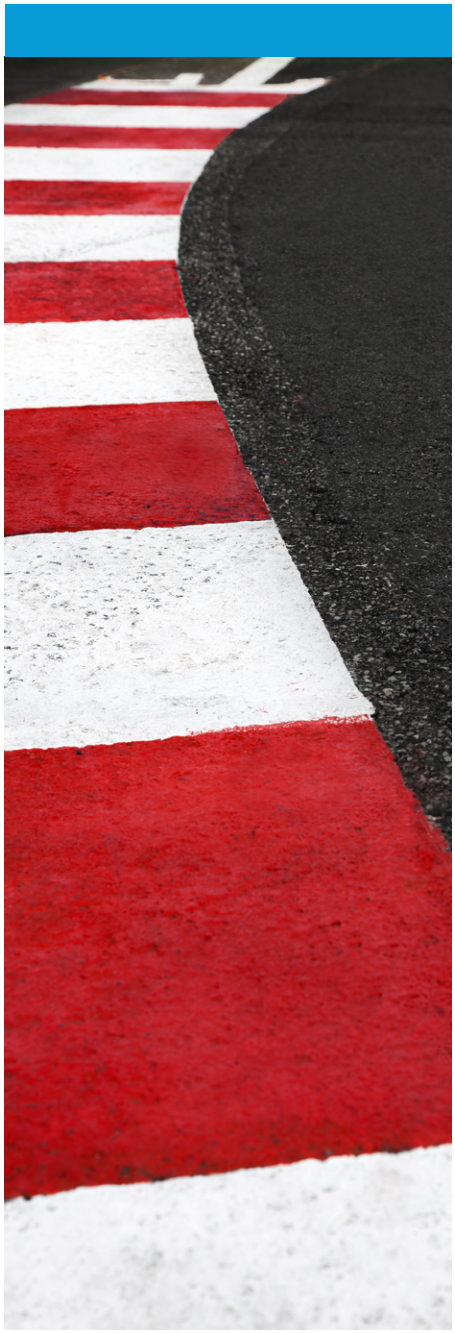
- Implemented a single, connected, manufacturing ERP platform with end-to-end visibility
- Gained real-time insights into project profitability, labor utilization and key KPIs
- Improved project quoting with access to historical project data
- Gained project management system that tracks project and labor costs
- Provided clients with real-time visibility into their projects, a company differentiator
- Streamlined manufacturing and engineering processes, providing visibility and metrics while improving workflows
- Enabled new revenue streams without needing additional admin staff or spreadsheets
- Gained efficient inventory and stocking capabilities that help race-day, and other operations run smoothly
- Acquired easy-to-use, intuitive system saving employees time when searching for data
- Reassigned eight staff previously managing spreadsheets to track Formula 1 team projects
- Acquired a data-driven scalable business and operations management platform

CHALLENGES

Horsepower and precision engineering are crucial components for championship race car teams. Increasingly, team executives are learning fine-tuning backoffice operations are just as critical to their success.

Seeing the operational pit stops of several top motorsport racing teams, newcomer Venture Engineering deployed Acumatica, a flexible Cloud-based ERP, to drive backoffice efficiencies across its multi-faceted engineering and manufacturing operations in the UK.

The business platform's manufacturing edition has been a game-changer for the company, helping it appeal to well-known motorsport brands while supporting the team's on-track activity – from multiple class victories to being crowned Michelin 24H European Champions this season.



Off to a Fast Start

Venture Engineering was founded in 2015 by three executives to support motorsports teams, including several Formula 1 teams, with precision parts. With 30 years' experience in motorsport racing, the trio quickly built a solid reputation for its precision engineering and meeting strict deadlines, foundational skills that led them to triple the manufacturing space and headcount in its first five years.

Today 10-year-old Venture Engineering offers motorsports engineering, historic race car restorations, and specialized projects including electric vehicle conversions. The company has also made batteries and parts for submarines, boats, trams, and trains. Venture Engineering has developed its own race team, which has since grown to compete in multiple series.

Following the team's win on their Creventic debut at the 24H Barcelona in 2024, they went on to compete in the full 2025 European Series, achieving multiple class victories along the way and a consecutive win at 24H Barcelona to secure the European GT4 championship title.

Running on QuickBooks and Spreadsheets

Operating on QuickBooks and spreadsheets worked when Venture Engineering was a small motorsport operation of five people. But as its reputation and projects grew, the founders realized they needed a robust ERP system similar to one they used at larger motorsport operations. Tracking 50 or more varied engineering projects was nearly impossible on spreadsheets and QuickBooks.

"Trying to track some of the bigger projects was just becoming an absolute nightmare," says co-founder Adrian Perkins, who is the company's Operations Director.

In addition, "the simplicity of QuickBooks didn't allow us to input enough detail to actually get the right information out at the other end," he says. "The data we had was actually pretty useless QuickBooks was basically good for input and invoices, and that was about it. Nothing else."

Venture Engineering provides its customers with hundreds of individual engineered parts. But it ran manufacturing operations on paper, with spreadsheets and institutional knowledge, which left it driving blind.

"When you are tracking parts that are relatively low in cost but high in volume, it feels like you are busy," says co-founder Joe Lofthouse, Manufacturing Director. "You feel like everything's going really well. But it's only at the end, when you look back on the project, that you realize we should have been charging more."

"We just didn't have that visibility," he adds. "When there's a one-off project, little things just go under the radar that we weren't capturing."

For example, labor wasn't always tracked, which made it difficult to justify some costs to customers, especially at the end of an 18-month engagement. Without a bill of materials, it was hard to understand if an invoice reflected all parts used and the cost of outside parts.

Understanding what parts or materials were available in inventory meant walking to the warehouse and counting parts. They had no way to reserve parts for particular projects, which meant parts might not be available if another project grabbed them first. Restocking parts was guesswork.

Historical information on past projects was scant, which made quoting similar projects difficult. Managing spreadsheets, schedules, and stock for customers – especially larger projects – was a time-consuming task for employees.

Eventually, "It got to the point where it just wasn't sustainable to just keep working like that." says Perkins. Especially if they wanted to retain the company's reputation for the speed at which they work, their attention to detail, and being very deadline driven.

SOLUTION

Several of the founders had used IFS previously, so they understood the power and efficiency that ERPs provide. "I knew we needed what IFS had, but I also knew that we didn't need such a big program," says Perkins. "It's for a much bigger company than ours."

"A lot of the takeaway that we'd had from the systems we'd run before was we didn't need it to become too much," adds Andy Williamson, Director, mentioning he had used SAP and IFS. "Quite often it needs to support the business, not become the business. In a lot of instances those big programs just take over everything, and introduce a whole load of lag, delays, and lost time."

Venture Engineering researched Oracle NetSuite, Asana, and several other ERPs.

"From day one of looking at Acumatica, it just felt very flexible in the way you could use it, and it was very easy to customize everything to what we wanted," says Perkins. "Other options, like NetSuite for example, were very rigid. It was kind of you get what you get and that's it. Acumatica's flexibility definitely drew us in." It also provided needed functionality, he says. "What struck me right away was that Acumatica did everything we needed it to with MRP, stock control, and the project module."

> "Ever since we started using Acumatica, we can track and trace absolutely everything. Having the knowledge base and the vision to see work in that much detail is just absolutely imperative to what we do."
>
> -Joe Lofthouse,
> Co-founder and Manufacturing Director, Venture Engineering

Activating New Processes

Venture Engineering deployed Acumatica Manufacturing with assistance from Cedar Bay Partners, one of Acumatica's leading partners in the UK. Implementation was smooth, executives say. The implementation took three months, with Venture tackling purchasing, inventory and finance in a phased deployment. They then added functionality including project

accounting, production orders, and more reporting, which they gradually deployed over the rest of the year.

The hardest part was shifting from entrenched processes to activating new ways of doing business. "We had to make sure the team understood how they were going to use the system, how we wanted them to then start to track data, which has been an ongoing process over the last 12 months," Perkins says.

When the team started to see the system's output and what it could do for them, even those that seemed anti-program in the beginning were won over, he says. "We've had multiples of those light bulb moments where people have suddenly gone, okay, now I understand why I should do all of these things or why it's good for me to put this information into the system."



BENEFITS

Game-Changing Transformation

Venture Engineering's founders and executives say Acumatica transformed the business, and its transparency has allowed them to attract and win large projects they previously thought might be unattainable. Today, that same capability enables Venture to support teams operating at the highest levels of motorsport, delivering the precision, efficiency, and performance demanded by elite competition. They have full visibility throughout the entire operation with information stored in a single platform that they access in real time no matter where they are. They all characterized the impact of Acumatica as "game changing."

They now understand which projects are the most profitable, where they need to increase prices, and quote more accurately with access to historical information, which they didn't have previously.

"From where we were at the start to where we are now is just mind blowing," says Lofthouse. "Our growth has accelerated dramatically since we began using the software."

Adds Williamson, "The continued growth of the business has only been possible because the system allows us to track everything and function properly throughout the business."

"We have up to 50 or 60 live projects at any one time on top of the day-to-day make-to-print parts that go through the business. Being able to track inventory, track the progress of any project, keep an eye on the costs and the time that's been spent is because of Acumatica. This is the only way we can operate with that amount of activity."

The amount of different and varied projects that go through this business is incredibly high, Williamson says. "The difference is that the traceability and accountability we have through the system has been game changing for us. In fact, we just couldn't do it without Acumatica; it would be impossible."

Full Data Visibility

Phil Moss, Finance Manager, joined Venture Engineering after Acumatica was deployed. Like others, he found it easy to learn, user-friendly, and intuitive. He liked Acumatica's ability to drill down and quickly trace transactions. He's building dashboards with data the company didn't have previously.

"The key for us now is getting used to having the information and how can we then make best use of that," he says. "We are not used to having all that detail available, which is now something that we can learn and grow from."

Adds Williamson, "Now we can really start to compare what's been happening year on year and make some properly informed decisions. We have one view and one way of operating, and Acumatica is going to be a huge benefit to us."

> "It's been a game-changer. Acumatica has completely transformed the business and has just made everyone's life so easy."
>
> -Adrian Perkins,
> Co-founder and Operations
> Director, Venture Engineering

Quoting projects has greatly improved. Rather than trying to remember what they charged on a previous project, they can look it up. That's important. Venture Engineering offers a preliminary budget to customers, all parties understand that it will change, and some items may be quite difficult to engineer.

"We regularly operate on an open budget system," Williamson says. "We have a set of assumptions that sit alongside a preliminary price. If these assumptions change, then we need to adjust our figures. Acumatica allows us to track and trace the changes and for larger projects, we can even provide our customers with restricted access to their own area of work,
so they can see those changes live and updates if necessary."

Having that level of transparency eliminates any disputes and has saved days since Venture no longer has to trade emails or phone calls with customers wondering where a project stands, if a back ordered raw material is holding up the schedule, or parameters changed.

"We're much more accurate in the quotes that we generate, it's quite a bit quicker, and we always have those moments of, 'ah yes, I remember that from last time, we need to make sure we capture that this time.' And that just wasn't happening before," he says.

Streamlined Manufacturing

Venture Engineering produces main chassis, suspension parts, and roll cages, among other parts, and has even reverse engineered full race cars for customers. Its projects have involved working with teams competing at the highest levels of motorsport, in WEC, F1, IMSA. "There are not many grids in top-level motorsports where we don't find some of our parts, which is quite nice to see," says Williamson.

Manufacturing was run with spreadsheets previously. The company relied on institutional knowledge, wasn't accurately tracking labor costs, didn't have real-time inventory numbers, scheduling was inefficient, and gathering information at the end of a project was a lengthy manual task that led to inaccurate reporting.

"It was impossible to track project costs, labor, and inventory," says Lofthouse. "We were always working hand-to-mouth with little visibility."

Those making parts often had to hunt down engineering schematics, find parts to make larger systems, and physically transport their finished part to another department for further manufacturing if it was needed. Change orders weren't always documented, and priorities were conveyed through emails or conversations.

"Ever since we started using Acumatica, we can track and trace absolutely everything," says Lofthouse. "Previously, there was work we thought was the be-all until we started looking at the data and realized it wasn't making as much money as we thought. Having the knowledge base and the vision to see work in that much detail is just absolutely imperative to what we do."

"As a business owner," he continues, "it gives you confidence, and an understanding of the intricacies of the way everything works. You don't worry about having to know everything because things are now ticking away (automatically) in the background."

Manufacturing employees now view real-time parts inventory and get items brought to them with exactly what they need, with all the right instructions, which can be broken down into sections, he explains. "I don't just get a big pile of bits on my bench on day one," Lofthouse says. "I get a bit each day, so it's all scheduled correctly. We've had some really good wins on
the manufacturing side."

Inventory Visibility

Inventory tracking has greatly improved. Venture managed inventory "badly," says Perkins. "It was probably a spreadsheet that wasn't really updated regularly, and it was never that accurate." They didn't realize how bad it was until a job candidate, very impressed with the operation, asked how they handled inventory. "And we kind of looked at each other and went,
we don't really track stuff," Williamson says. "And then he asked about MRP, we're like, 'Well, we don't really do that.'"

It wasn't business critical when Venture was small and worked a few projects. Now with Acumatica, "the jump in our capabilities has been huge," says Williamson. "Now we track stock with relatively little input in terms of our time, inventory managers are doing their jobs, and everything's very easy to keep an eye on."

And that's incredibly important because for the work they do for F1 teams and other race teams, they have to have full traceability of materials, certifications, conformity, and any testing. They had to assign a person to manage the spreadsheets associated with each of its eight F1 customers previously. "Now, it's all on one system and easy to find," Perkins says. "If we ever have a problem with a part, we've got all the traceability, which wouldn't have been feasible five years ago."

Venture has more than 20,000 parts logged in inventory and 1,000 or so BOMs, says Will Bos, Operations Manager. "We do stock takes to match the financial records, just the whole manufacturing process, streamlining it through the business, being able to see where parts are at certain times from as soon as you send it out for a quote to invoicing the customer – the whole journey."

> "The traceability and accountability we have through the system has been game changing for us. In fact, we just couldn't do it without Acumatica; it would be impossible."
>
> -Andrew Williamson, Director, Venture Engineering

Accurately track labor costs

As the company grew, it became harder to track hours worked on specific projects accurately. "It was almost like a bit of a finger in the air at the end of the job trying to capture all the time that different people and different departments would put in," Lofthouse says. "Now every member of the staff inputs a time sheet at the end of every week."

They can send those hours to customers so customers understand how initial quotes are changing. And executives can make sure the company is charging accurately, he says.

Andy Bird, Design & Project Manager, uses labor tracking data to plan design team workloads, and to purchase materials and parts for manufacturing. "Through our engineering release process, we release into Acumatica and then that enables us to get parts that we've designed or drawn off the shelf that feeds into a bill of materials into the system. I then track those parts as they come in and also their associated costs. Any costs related to a project through the cost report and the quotation phases are tracked and can be used in project reports."

He then can easily, in real time, pull reports to get a helicopter view of a project – its timeline, forms, engineering work, materials, and project reviews.

It is hard to quantify the time he has saved not having to find spreadsheets, shift through them, and then try to make sense of all the data. "Efficiency is probably our biggest saving," says Bos. "We have all these background processes and data in one place, and everything just ticks over like clockwork.

"If you took out Acumatica for a week, we would really struggle to run at the speed we do now."

Created Company Differentiator

One feature Acumatica provided that the crew didn't anticipate led to a differentiator in the marketplace, says Williamson. Because Acumatica's unique licensing model doesn't restrict the number of users, Venture can give a customer restricted access to their own project. This was helpful on a large project in which the customers supplied some of its own parts and then commissioned Venture to design and manufacture others.

"We've been able to give access to some of the bigger companies we work for on long term projects, which allows them to see what's happening on their project," Williamson says. "They can see where each of their jobs are in the process, how many parts of theirs we are using, what's been quarantined, what's been rejected, how many parts have been picked, and we create a bill of materials that allows us to track and trace everything."



"That has been incredibly powerful to be able to open the door to these companies and allow them to see inside our system," he continues. "We're comfortable with that because they can't see everything that's going on throughout the company, only the relevant information to them. That level of visibility gives them a level of confidence in what we are doing way beyond what we can communicate, because they can see it for themselves."

The visibility "kind of blew their minds a little bit because that's not something that anybody else would offer them. But it goes hand in glove with the way we like to work, which is to be very open and honest from the start," Williamson says.

Acumatica in the Pits

Venture no longer brings spreadsheets to racetracks when its customers are racing. The team takes trucks filled with spare Venture parts to have on-hand if a car breaks down and packs a laptop that can remotely access Acumatica. "As we consume parts during a race week, the guys are adding the demand back onto Acumatica, so they're already ahead of the game when they get back," says Perkins. "Parts are being ordered almost in real time as parts are consumed on a race weekend."

Venture also tracks employee hours and race day consumables by customer using Acumatica.

"On race days, we track all the hours for our team, which links back to a project for different customers, and different cars, all of which is split by task," Bird says. "We have consumable costs for an event, and we have a parts list in preparation for an event. We use Acumatica to plan all the dates for what and when we need to purchase them by. It allows us to get the best price on all the consumables in order to support the events, and then we can track exactly what car it's going on."

New GT4 Race Team

Acumatica has not only transformed Venture Engineering's manufacturing operations, but also supported the launch and ongoing operations of the race team, both in the workshop and at the track, by streamlining processes and providing greater efficiency, flexibility, and visibility.

"Our long-term aim is to be at the top of world endurance racing, it is where we have all come from, but now we want to do it with Venture rather than the teams that we've worked for in the past," says Williamson. "We've worked for Aston Martin Racing, Subaru World Rally Team, Ford Performance, and various other teams in the past, and we want to get a team back to the very top level of endurance racing in the next five years."

Achieving that goal with its own team will help build its brand and further cement its engineering prowess. Having a flexible ERP driving efficiencies and feeding data throughout the backoffice and manufacturing at such a young stage of development, will help propel them forward quickly.

"The structure in the organization that sits within Acumatica allows us to focus," says Williamson. "It allows us to focus on the things that are going to make the difference, the things that we need to push to get conversations started with a mainstream manufacturer, whether it's Mercedes, BMW, Porsche, Aston Martin, McLaren, Ford, or Corvette, whoever it might be."

"We're going to have to form a great partnership with this manufacturer, and being able to give them access and to see these multi-million pound programs per year, can help to place a huge amount of trust in us to deliver," he continues. "And that's not only carrying their brand and representing them at the highest possible level, but also being able to communicate clearly where we are, what's going on, where we're at in our budgets."

"With the Acumatica system being able to produce reports, and provide clear detailed evaluations, plus giving our customers visibility of stock levels and other aspects of the project, it's an immensely powerful tool for us," Williamson says. "It's a huge step forward. Now, when we go into conversations, It gives us the confidence to not just say that we think we can do
these things, but show how we've already done it."

Having real-time data is key, Venture executives say.

"Whether it's the data from the car on the track to decide how we're going to improve the performance of the car, to checking the data that surrounds a project to checking that we're on target or achieving what we expected or needing to make some adjustments," says Williamson. "Having the data means you can make informed decisions. If you don't have the
data, you're just guessing, aren't you?

"Then you're just relying on a bit of experience and some luck. So, as we said before, Acumatica has been game changing for us. We now have all the tools we need and it's down to us to use this data in the best possible way to drive the business forward."

Acumatica
The Cloud ERP



Chiesi: Delivering on a compulsion for continuous innovation through a far-reaching transformation to advanced ERP in the cloud

9 months
to complete a large-scale business migration to the cloud.

75%
reduction in data migration downtime, from 40 hours to 10 hours.

100%
of tasks completed by the end of the migration project.

How Chiesi built a future-fit business landscape

At a time when the pharmaceutical sector is rethinking traditional models and embracing bolder, patient-centric innovation, Chiesi Farmaceutici S.p.A. has kicked off a large-scale digital transformation. Migrating to SAP S/4HANA Cloud Private Edition through the RISE with SAP journey is helping the company improve the lives of others through innovation.

"Our migration to SAP S/4HANA Cloud Private Edition through RISE with SAP is an important step in our digital transformation, setting the stage for accelerated innovation in respiratory health, rare diseases, and specialty care."

-Umberto Stefani
Global CIO,
Chiesi Farmaceutici S.p.A.

Driving potent healthcare breakthroughs through digitalization

Chiesi Farmaceutici S.p.A. is an international, research-oriented, biopharmaceutical group engaged in developing and commercializing innovative pharmaceutical solutions that improve the quality of human life. Established in 1935, its operations span 31 countries across the globe, and it exports to more than 100 nations worldwide.

Focused on research, development, and commercialization of treatments and patient support services in respiratory health, rare diseases, and specialty care, the heart of Chiesi's work lies in caring for others. Accordingly, the company abides by the principle of "Do good, do well, repeat." This philosophy underscores its commitment to creating successful business solutions ("do well") that benefit society ("do good") and reinvesting in impactful initiatives ("repeat").

The company's ambitious goal is to create a ripple effect of positive change, demonstrating that doing good and doing well are not only compatible but mutually reinforcing.

The area of research and development plays an important part in Chiesi's growth, with the company investing 24% of its turnover in this practice, ranking it first* among Italian pharmaceutical companies for R&D investments. Chiesi's significant contribution to research and development combined with its focus on digital transformation in the cloud places the company in a strong position to deliver on its lofty goal.

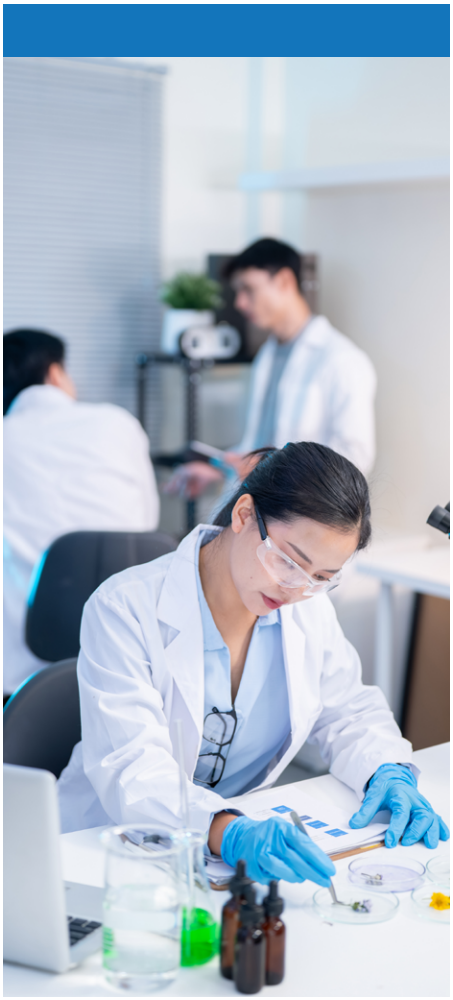
What's more, in achieving certification as a "B Corporation" in the biopharmaceutical sector, Chiesi is counted among a handful of pharmaceutical businesses that are leading a global movement for an inclusive, equitable, and regenerative economy.

*European Commission, Joint Research Centre, EU Industrial R&D Scoreboard 2023.

Inspiring a foundational shift to the cloud

As a long-established customer of SAP, Chiesi's growth has been underpinned by SAP solutions for quite some time. Embarking on a three-year digital transformation program, Chiesi prioritized a foundational shift from SAP ERP powered by SAP HANA to SAP S/4HANA Cloud Private Edition through the RISE with SAP journey. RISE with SAP provides a tailored transformation path with a standardized framework, an integrated tool chain, and expert guidance, as well as extensibility options using SAP Business Technology Platform (SAP BTP).

In a project that it called SPIRE, with the motto of "Be InSPIREd," the scope of the transformation touched 26 countries. It required integrations with its business landscape featuring the SAP Business Warehouse application, SAP SuccessFactors solutions, the SAP Concur portfolio, and SAP BTP. It also included integrations with SAP Integrated Business Planning solutions, SAP Information Collaboration Hub, and the SAP Advanced Track and Trace for Pharmaceuticals application for SAP S/4HANA Cloud Private Edition.



To guide the technical transition to SAP S/4HANA Cloud Private Edition, Chiesi joined forces with IBM and worked with a team of experts from SAP. The team set the stage to migrate its historical data toward the to-be data model on advanced ERP by accessing system landscape optimization service offerings from the Data Management and Landscape Transformation (DMLT) team.

To shore up overall program governance from a technical and functional standpoint, the premium engagements portfolio of offerings from SAP Services and Support proved invaluable in achieving the go-live on time and within budget. Activating specific consulting services, including the selective data transition service for SAP S/4HANA provided by the DMLT team, contributed to the smooth transition to SAP S/4HANA Cloud Private Edition. This allowed Chiesi to optimize business downtime to only one weekend, with data migration downtime reduced from 40 hours to just 10 hours.

Another key factor contributing to the success of the project was strong governance through 19 operating committees and 5 steering committees who oversaw 222 test sessions held with key users and 2,000 transactions tested by affiliates.

Establishing robust and future-ready global business operations

Chiesi's transformation team realized a smooth transition to the new cloud operating model, with almost 100% of migration support tickets solved in one day. As part of the project, more than 400 users were trained, more than 300 obsolete business transactions were detected, 2,500 transactions were remediated, and approximately 600 interfaces were mapped and optimized using SAP Fiori apps.
Having successfully completed its migration to SAP S/4HANA Cloud Private Edition, Chiesi is now operating on advanced ERP in the managed cloud environment, with nearly 2,000 users performing their daily business activities in the upgraded environment.

Chiesi also integrated other on-premise SAP solutions and third-party systems into its new cloud environment, including its instance of the SAP BW/4HANA solution and SAP solutions for business planning. New architecture, built on Amazon Web Services, is now hosting the company's instances of SAP Process Orchestration software, SAP Advanced Track and Trace for Pharmaceuticals for SAP S/4HANA Cloud Private Edition, and SAP Solution Manager.

Having created strategic, technical, and operating pillars to frame the company's digital transformation, Chiesi is in the process of building a center of excellence to help maximize value from its new technology foundation. This involves setting up a competence center focused on SAP BTP to enable and advance innovation on the platform and expedite experimentation with SAP Business AI. This playground provides the perfect foundation for continuous improvement and innovation.

"Thanks to premium engagements services from SAP, we've created the strategic, technical, and operating pillars to support Chiesi's ongoing digital transformation and set up our competence center for SAP BTP."

-Umberto Stefani
Global CIO,
Chiesi Farmaceutici S.p.A.

Embracing more automation to support continued breakthroughs

In the months ahead, Chiesi is looking to kick off new projects as part of its continued digital transformation journey. Over the next two years, the company plans to take advantage of new process innovations, including migrating its warehouse operations to the RISE with SAP advanced logistics package that features the SAP Extended Warehouse Management application. Other priorities include adopting the SAP Master Data Governance application.

Elsewhere, the company is automating expense report monitoring processes using AI embedded in SAP Concur solutions. This will help Chiesi eliminate manual control of employee expense reports and strengthen compliance while allowing it to analyze spend with advanced capabilities that can help identify inefficiencies and correct them.

In parallel, Chiesi plans to set up more integration flows throughout its business landscape using SAP Integration Suite.

For Chiesi, its foray into AI experimentation is just the beginning. The company is continuing to analyze opportunities that could be enabled by AI.

Featured partner

With over half a century of partnership experience, IBM is a global leader and an SAP platinum partner. As one of the largest implementation providers worldwide, the firm has tens of thousands of world-class practitioners who've completed more than 6,500 projects around the globe. IBM supported Chiesi by leading the migration to SAP S/4HANA Cloud Private Edition through RISE with SAP.



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

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

FINNAIR

Pandora wants to replicate the magic of in-store shopping online. With Agentforce, they're focusing on building personalised recommendations and on-demand guidance to boost customer engagement and loyalty.

80%
customer enquiry resolve rate

25%
reduction in employee onboarding time

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.



TAL Building Centers

Turning Data into a Business Advantage: Boosting Margin and Customer Value with Epicor BisTrack deployed in the Cloud

Company Facts

- Location: Vancouver, Washington
- Specialist Industry: Building Materials Dealers
- 31 building centers throughout the Pacific Northwest
- Visit customer website

Challenges

- Complex management of multiple ERP systems
- Disparate pricing, inventory, and sales data
- Limited metrics on product and financial performance

Benefits

- Quickly identify areas for ongoing operational improvement
- Easily adjust TAL pricing to meet demand—helping to increase gross margin by 100 basis points
- Improve insight for inventory management—reducing inventory by 15%
- Bring automation to AR, AP, and purchasing processes—reducing back-office headcount by 20%

TAL Building Centers (TAL) is on quite a trajectory. With roots dating back to 1906, this family-owned business affectionately refers to itself as a 120-year-old startup. And understandably so, as the company has been in rapid growth mode, acquiring reputable building materials companies and tripling sales volumes and headcount since 2022.

Today, the company stands tall with 14 brands throughout the Pacific Northwest, backed by over 520 employees and a commitment to delivering building solutions for professionals and homeowners alike.

Rapid Growth Shines Light on ERP Challenges

But according to Jason Blair, CEO of TAL, rapid growth isn't all roses and rainbows. Following several acquisitions, the company was operating two different point-of-sale platforms across seven instances—this created behind-the-scenes complexity and disparate information, such as SKU sets and ledgers. The time was right to standardize with a single ERP solution.

> "Epicor was an ally during the BisTrack migration process. We worked together, shoulder to shoulder, confirming we'd chosen the ideal partner."

"We wanted to advance our business and streamline processes, management metrics, and cross-department reporting," shares Blair. "We weren't looking for just another software vendor but rather a long-term partner for our business."

Going 'All In' with BisTrack

TAL was focused on driving widespread efficiency gains and had platform requirements tied to improving accounts payable, credit processes, and dispatch and delivery, as well as tapping into analytics and a mobile app for employees.

"We evaluated our existing solutions and other industry options, speaking with businesses we respected about their ERP vendor of choice," continues Blair. "It was evident, very quickly, that Epicor BisTrack was the leader in the building supply market and the right choice for us. So, we went all in!"

All Eyes on Implementation

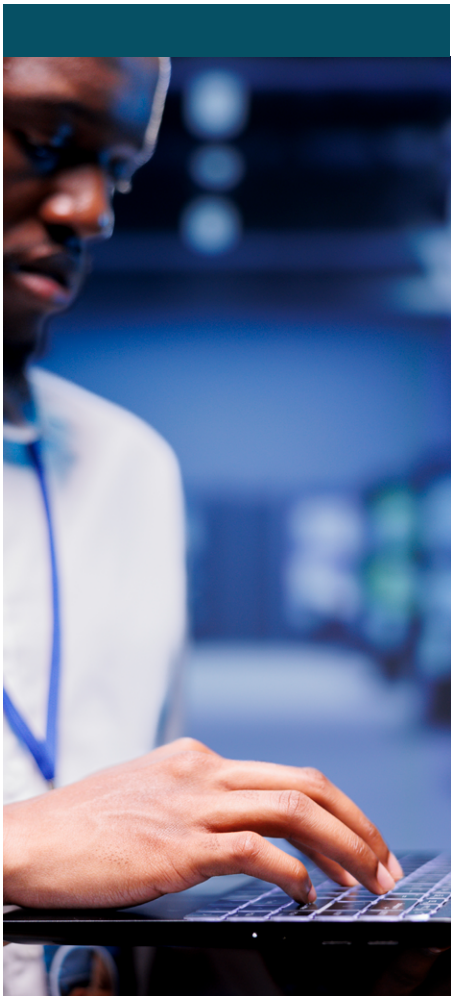
Once the decision was made, TAL set an aggressive timeline to convert five databases to BisTrack across multiple locations within 18 months—a stretch goal that put TAL and Epicor's agility to the test. While TAL had an experienced internal technology team who understood migration processes, the company looked to Epicor Professional Services to make the timeline a reality. Blair highlights how TAL leaned heavily into the partnership, leveraging Epicor's system conversion best practices to complete a database conversion every few months—an incredible pace.

"Epicor was an ally during the migration process. We worked together, shoulder to shoulder, confirming we'd chosen the ideal partner," adds Blair.

Driving Business Transformation with Actionable Intelligence

With 31 operating units targeting a mix of lumber and building materials professionals, contractors, and consumers, TAL's ERP platform needed to support omnichannel business models and deliver business intelligence to help management better understand performance across products, departments, and locations.

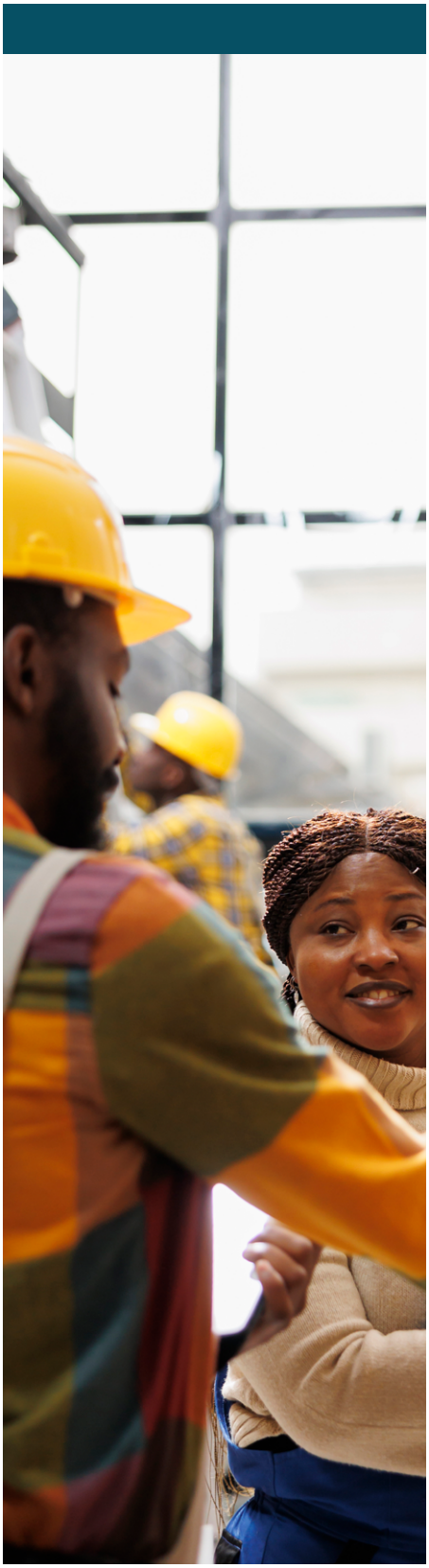
To that end, TAL cites BisTrack as a huge operational advantage, leaning on new insights to evaluate internal processes, identify opportunities, and drive widespread improvements. A heavy user of Epicor Data Analytics, Blair keeps EDA open during the day, assessing how the business is performing from a sales perspective. "It's amazing how fast we can manipulate information and zero in on business analytics to know where to prioritize efforts."



Data-driven Pricing Shifts Boosts Margins

BisTrack helped TAL gain control of 1,000's of stocking codes across 31 locations, which spearheaded a major pricing overhaul, allowing the company to turn manual pricing adjustments into an automated, intelligent process. As a result, the company can quickly modify prices across product lines and branches, customizing SQL routines to perform automated updates based on desired parameters—improving gross margin.

> We can instantly monitor, manage, and influence pricing on a daily basis to be more reactive to customer and market demand, leading to a 100 basis point increase in margin across categories."



"We can instantly monitor, manage, and influence pricing on a daily basis to be more reactive to customer and market demand, resulting in a 100-basis point increase in margin across all categories," Blair continues.

Inventory and Productivity Gains

But the operational benefits don't stop there. TAL has homed in on inventory reporting across product categories and locations, reducing inventory by 15%.

The company is also able to dig into information to layer on efficiencies tied to accounts payable and receivables, rebates, purchasing, and financial management, resulting in a 20% reduction in back-off headcount across functional departments. Plus, with BisTrack Journey Planner and BisTrack Delivery, TAL has standardized dispatch and delivery processes, improving order tracking and proof-of-delivery capabilities to boost customer satisfaction.

A Partner for Decades

For companies considering a move to BisTrack, Blair says, "Don't wait! The sooner you make the move, the better."

TAL credits BisTrack as an operational asset, contributing to customer retention and financial success. "Moving to BisTrack wasn't a decision we made lightly, but one of the best we've made," ends Blair. "We've gained a partner for decades and an ERP foundation to bring even more value to our customers and communities—today and for years to come."

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