ERP NEWS
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THE FUTURE OF WORK

How ERP, AI and workforce intelligence are reshaping roles and redefining productivity.

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EDITOR'S NOTE

GREATER AUTONOMY. HUMAN ACCOUNTABILITY.



Dear Readers,

As AI takes on more work across enterprise systems, organisations must decide how much responsibility to delegate and how to retain meaningful oversight. This October issue of ERP News explores that balance through connected platforms, trusted information and practical business outcomes.

Our interviews bring different perspectives to this challenge. Eric DiProspero of OpenGov discusses connected government and responsible AI adoption. David Binny of Panaya examines how autonomous testing can build confidence in increasingly independent systems.

In finance, George Kurdin of Monk explores AI-driven accounts receivable and the decisions that require human authority. Jean-Jacques Bérard of Esker explains how intelligent reasoning can operate within clear financial controls.

Eric Okimoto of Widge considers how AI can preserve manufacturing expertise and make it accessible across the workforce. Stewart Monk and Chris Rauch of Proactis discuss why Source-to-Pay success depends on adoption, reliable processes and measurable value.

These themes extend across our wider coverage. Unit4's Canadian research highlights persistent gaps between digital investment and connected operations. Developments from SAP, Infor, IBM, Syspro and Basware address workforce intelligence, usability, industrial AI and financial protection. Rootstock's Ellen Rothschild examines how lasting operational savings can influence earnings, cash and implied equity value.

Our Customer Story Series grounds the discussion in everyday work, spanning frontline skills, Tecumseh's freight management, Wayne Safety's warehouse operations and TOMRA's field service transformation.

Across these contributions, a shared priority emerges: give people reliable information, establish clear responsibility and measure progress through better operational outcomes. Greater autonomy makes human judgment increasingly valuable in determining what deserves attention and which decisions require care.

We hope this issue offers useful perspectives for navigating that change.

Enjoy the issue.

PINAR SENGUL
Editor-in-Chief, ERP News

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FROM LEGACY SYSTEMS TO CONNECTED GOVERNMENT

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OpenGov

ERP BECOMES A PLATFORM FOR PUBLIC SERVICE

Government ERP is expanding beyond finance and accounting. Modern platforms are bringing budgeting, procurement, human resources, utilities, infrastructure, permitting and grants into a connected operational environment.

AI STARTS WITH TRUSTED DATA

AI can help public sector teams work faster, identify issues earlier and make better-informed decisions. But its value depends on reliable data, clear permissions and strong governance with people remaining accountable for every outcome.

In this ERP News Q&A, Eric DiProspero, Chief Revenue Officer at OpenGov, explores how connected ERP, trusted data and responsible AI are modernising government operations and strengthening public service.





ERIC DiPROSPERO

Chief Revenue Officer, OpenGov

Eric DiProspero is Chief Revenue Officer at OpenGov, where he leads the company's sales organisation and go-to-market revenue strategy. In this role, he works with government leaders as they modernise legacy systems, connect data and workflows, and adopt technology designed specifically for the public sector.

Before joining OpenGov, Eric served as Sales Director of Digital, Mobility and IoT at AnyPresence. His experience spans enterprise technology, digital transformation and connected platforms, giving him a broad perspective on how modern systems can help organisations operate more effectively and deliver better services.

> *ERP modernisation has gone from being an IT project to becoming an operational and leadership priority.*

Q: OpenGov now has an ERP presence across 38 states. From your conversations with government leaders, what has changed in the market to make ERP modernization a more urgent priority today?

ERIC DiPROSPERO: The cost of standing still has gone up.

For a long time, governments could live with disconnected systems because their people found ways to work around them. They reconciled data, moved information between systems, and carried the burden themselves. That doesn't scale anymore.

What we hear consistently is that leaders and the public are not willing to accept a collection of disconnected systems that require employees to reconcile information manually and work around the technology. They want a modern operating environment that connects the organization and helps their people execute. ERP modernization has gone from being an IT project to becoming an operational and leadership priority.

We're seeing this urgency reflected in market momentum, our ERP footprint now extends across 38 states, with new deployments this year in eight states including Alaska, Connecticut, Georgia, Massachusetts, and others. That expansion reflects governments moving from theory to action.

Q: You've said that the era of ERP being primarily a transactional financial system is ending. What does the next generation of government ERP look like, and how different is that vision from the systems many public-sector organizations are still operating today?

ERIC DiPROSPERO: ERP has always been an important financial backbone. But government is much bigger than finance. Government is people, infrastructure, procurement, permits, utilities, grants, and service delivery. The next generation of ERP has to connect the heartbeat of finance to all of that real, meaningful work happening across the agency and in the community.

That is a very different model from the systems many governments are still using today. Finance and HR should be in lockstep. The back office and the field should be connected. Leaders should be able to see what is happening and act on it without stitching together information from five different places. Government doesn't run in silos, and its software shouldn't either.

Q: OpenGov is bringing finance, budgeting, procurement, HCM, utilities, infrastructure, permitting, grants and other functions together around shared data and workflows. Where do governments typically see the greatest operational benefit when these previously separate functions begin working as part of one connected environment?

ERIC DiPROSPERO: The biggest benefit is connection. When every department has its own system, employees spend too much time acting as the integration layer, finding information, reconciling it, and handing it from one team to another.

When the environment is connected, the work starts to move differently. Finance can connect dollars to outcomes. HR and finance can plan together. Procurement can see budget context. Public works can connect infrastructure decisions back to financial priorities. The back office and the field get in lockstep. That is where the real operational value shows up: not simply in having fewer applications, but in helping the government operate as one organization.



Q: Many governments have accumulated disconnected applications and legacy systems over decades. When an organization begins consolidating that environment, what are the hardest barriers to overcome, technology, data, processes, organizational change, or something else?

ERIC DiPROSPERO: Technology is rarely the hardest part. The bigger challenge is usually unwinding years of processes, workarounds, and organizational habits that developed around old technology.

Every department may have its own way of doing something, its own source of truth, and sometimes its own definition of the same data. Modernization creates an opportunity to address that, but it requires leadership and collaboration across the organization.

The agencies that are most successful treat modernization as an operating transformation, not simply a software replacement. Technology is the enabler. The real objective is creating better ways for people and departments to work together.

Q: ERP implementations in the public sector have traditionally been associated with lengthy transformation programs. OpenGov says some deployments can now be measured in months rather than years. What has changed in the implementation model to make that possible, and where should government leaders be cautious about pursuing speed at the expense of successful transformation?

ERIC DiPROSPERO: Government should not have to choose between speed and quality. Modern cloud platforms have changed what is possible. Organizations no longer need to treat every implementation as a massive custom technology project. When the technology is purpose-built for government and the implementation starts from proven processes, agencies can focus their energy on the decisions and workflows that truly differentiate their organization.

We're seeing this play out with customers like the Town of Frederick, Colorado, which expanded to a full enterprise platform, adding Financial Management, Budgeting, Utility Billing, and Grants Management, and the City of Plattsburgh, New York, which launched a citywide transformation across financial management, payroll, permitting, and utilities. Both are examples of how a purpose-built approach gets agencies live faster.

But speed should never become the objective by itself. The goal is successful adoption and better outcomes. You still need strong executive sponsorship, clean data, engaged employees, clear decisions, and disciplined change management. Moving quickly is valuable when it removes unnecessary complexity.





Q: AI readiness is a central theme in OpenGov's ERP strategy. In practical terms, what needs to be in place before a government organization can move from experimenting with AI to embedding it meaningfully into day-to-day operations?

ERIC DiPROSPERO: The foundation matters. AI becomes much more useful when it has trusted data, clear permissions, connected workflows, and the right governance around how it is used.

That is why the platform conversation and the AI conversation are becoming the same conversation. If your information is fragmented across dozens of systems, AI has limited context and employees still have to piece the answer together themselves.

The organizations that will get the most value from AI are the ones that connect their data and workflows first, establish clear accountability, and then introduce AI directly into the work employees are already doing. That is when AI moves from an interesting experiment to something that can meaningfully improve day-to-day government operations.

Q: OpenGov argues that fragmented systems and disconnected data limit the value governments can derive from AI. Is the current AI conversation therefore exposing weaknesses in legacy ERP architectures that organizations may previously have been able to tolerate?

ERIC DiPROSPERO: AI is shining a very bright light on a problem government has dealt with for years.

You cannot expect AI to provide a complete answer if the underlying information is spread across disconnected systems, spreadsheets, and manual processes. In the past, organizations could compensate for that fragmentation with more manual work. Employees became the integration layer.

AI changes the equation. It makes the value of connected, trusted data much more obvious. The agencies thinking seriously about AI are quickly realizing that modernizing the underlying technology and data foundation is a prerequisite to getting the results they want.

Q: With OG Assist, AI operates within existing OpenGov workflows, permissions and controls. As AI begins to surface information, assist with decisions and complete more tasks inside ERP environments, how should governments think about governance, accountability and human oversight?

ERIC DiPROSPERO: Government has a higher bar for trust, and it should.

AI should make public servants more effective, but it cannot remove accountability from the people making decisions. Human judgment remains essential, particularly when those decisions affect public resources, services, employees, or communities.

That means AI needs to operate within clear permissions, security controls, transparent processes, and appropriate human review. The important distinction is that AI can increasingly prepare work, identify issues, surface information, and recommend actions while the government employee remains accountable for the decision.

That combination, more capability with clear human control, is how governments can adopt AI responsibly and at scale.

Q: The Frederick and Plattsburgh examples in your announcement highlight very different modernization needs, from reducing time intensive financial work and managing hundreds of grant opportunities to replacing paper-based and fragmented citywide processes. How important is flexibility when building a government ERP platform that must serve organizations with very different operational structures and levels of digital maturity?

ERIC DiPROSPERO: It is critical because there is no single starting point for modernization.

One government may have a strong financial foundation but need to connect grants, procurement, or operations. Another may still be replacing paper processes and disconnected departmental systems. Their starting points are different, but the destination is similar: better information, simpler processes, and a more connected organization.

A modern platform needs to meet governments where they are while giving them a path to expand over time. They should not have to modernize everything at once to start seeing value, and they should not have to replace the platform again every time they are ready for the next step.



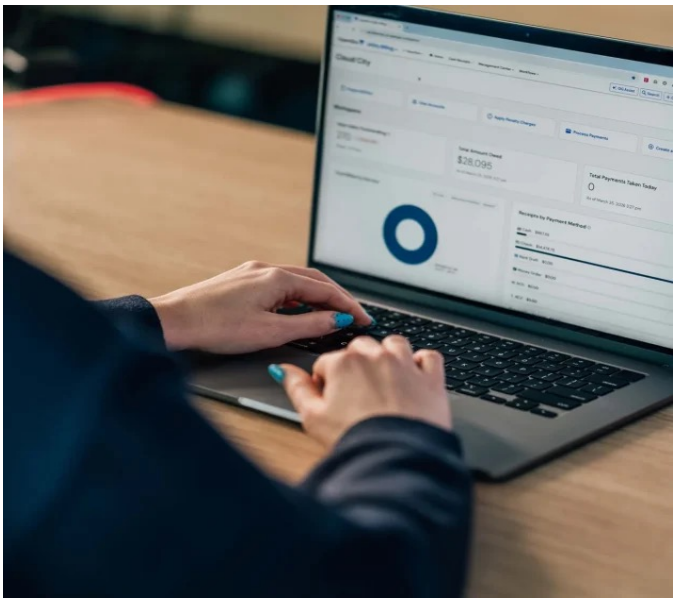
Q: Looking three to five years ahead, how do you expect the definition of government ERP to change? Will we still think of ERP as a distinct category of software, or will it increasingly become the underlying operational and data layer through which government employees, and eventually AI agents, interact with the organization?

ERIC DiPROSPERO: I think the category gets much broader.

We will still have financial management at the core, but the idea that ERP stops at finance will feel increasingly outdated. The real value will come from connecting the people, dollars, assets, services, and operations of government on a common foundation.

And as AI becomes more capable, that foundation becomes even more important. Employees, and increasingly AI agents working alongside them, will need trusted context across the organization to take meaningful action.

That is where government technology is headed: away from a collection of applications employees have to navigate and toward a connected operating platform that helps people understand what is happening, decide what to do next, and execute. For us, that is the promise of the Public Service Platform.



ERP NEWS

EDITORIAL TAKEAWAY

Government ERP is evolving from a financial system into a shared foundation connecting budgets, employees, procurement, infrastructure, utilities, permits, grants and public services.

This matters because fragmented technology places an invisible burden on public employees. When information is scattered across applications, spreadsheets and manual processes, people must find, reconcile and transfer data themselves.

Modernisation should therefore be treated as an operational transformation, not simply a software replacement. Connected platforms can simplify processes, improve visibility and help leaders understand how financial decisions translate into public outcomes.

AI makes this foundation even more important. Its effectiveness depends on trusted data, connected workflows, clear permissions and strong governance. Without them, AI may accelerate fragmentation rather than improve decisions.

Government also carries a higher standard of accountability. AI can prepare work, identify issues and recommend actions, but responsibility must remain with the people making decisions.

The next generation of government ERP will be defined by how effectively it connects people, data, assets and services while supporting both public employees and intelligent agents.

CONNECTED GOVERNMENT BEGINS WITH TRUSTED DATA, HUMAN ACCOUNTABILITY AND ONE OPERATIONAL FOUNDATION.

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CANADA'S DIGITAL AMBITION MEETS A DISCONNECTED REALITY

Unit4's Canadian research highlights a gap between digital transformation activity and the connected systems needed to support public services.

Completing a technology project is a visible achievement. Whether it makes an organization more effective becomes clear through everyday work: accessing information, coordinating departments and making decisions. Those routine interactions provide a practical test of whether the investment is delivering value.

Unit4's State of the Digital Nation: Canadian Transformation Trends report puts that distinction into focus. According to its published findings, 96% of organizations are advancing transformation strategies, yet 66% lack full confidence in interoperability across their systems. The figures point to a disconnect between the scale of modernization efforts and confidence in the resulting technology environment.

The combination raises a practical question for public sector leaders. If new applications cannot exchange information effectively, how much operational improvement can they deliver? Moving information between departments should be part of the transformation itself.

For ERP decision-makers, the implication is clear: delivery milestones need to sit alongside measures of how well systems, data and people work together. That is where the value of modernization must ultimately become visible. Success should be judged by what employees can accomplish once the technology is in place.

UNIT4

WHEN DIGITAL PROGRESS LEAVES DATA BEHIND

Unit4's published Canadian findings indicate that 89% of respondents struggle to obtain the information they need, while 88% report difficulty accessing real-time data. The report's summary also identifies SaaS challenges among all participating IT leaders, with security, integration and costs each cited by 50%.

These findings suggest that adding digital capabilities does not automatically make information easier to use. From an operational perspective, a department may have a modern application and still depend on manual reconciliation to understand what is happening elsewhere.

That distinction matters when assessing modernization. A useful evaluation should ask how information moves between functions, how much preparation it requires and whether employees can access it when a decision is needed.

THE PRESSURE TO SAVE AND TRANSFORM

Financial constraints add urgency. Unit4 reports that all surveyed organizations are pursuing savings, while 42% are already reducing citizen services.

The investment challenge is therefore closely tied to service continuity. Leaders must assess immediate expenditure alongside the operational consequences of leaving existing problems unresolved.

As an editorial consideration, this calls for a broader view of value. Lower technology spending is one measure; time spent reconciling information, maintaining workarounds and handling avoidable delays also deserves attention.

PEOPLE REMAIN PART OF THE FOUNDATION

Unit4's analysis also identifies workforce constraints. It reports that 23% of organizations face recruitment challenges associated with return-to-office mandates, alongside growing demand for digital, analytical and technical skills.

For transformation leaders, this raises a delivery question: do the teams responsible for implementing change have the capacity to sustain it?

Training, clear responsibilities and employee involvement should therefore be considered alongside technical implementation. A system's usefulness depends partly on whether people understand how it supports their work and can adapt as processes change.

CONNECTING THE ORGANIZATION

Unit4 advocates a platform-first approach that brings finance, HR, procurement and operations together within an integrated environment. Its argument centers on aligning technology investment with shared organizational outcomes.

For ERP buyers, that provides a useful starting point for scrutiny. Integration should be assessed through concrete workflows: whether information can move reliably between departments, whether responsibilities remain clear and whether employees can complete work without repeatedly rebuilding context.

The wider editorial lesson is that transformation needs an operational definition of success. Going live establishes that a system has been delivered. What follows determines whether it helps the organization serve people more effectively.

89% - Struggle to obtain the information they need.
88% - Report difficulty accessing real-time data.

Source: Unit4, State of the Digital Nation: Canadian Transformation Trends. Figures refer to respondents in the Canadian research.

BUILDING TRUST IN THE AUTONOMOUS ENTERPRISE

David Binny, CEO of Panaya, explores how autonomous testing, Change Impact Analysis and continuous qualification can help enterprises give AI agents greater responsibility while maintaining human accountability.

Panaya

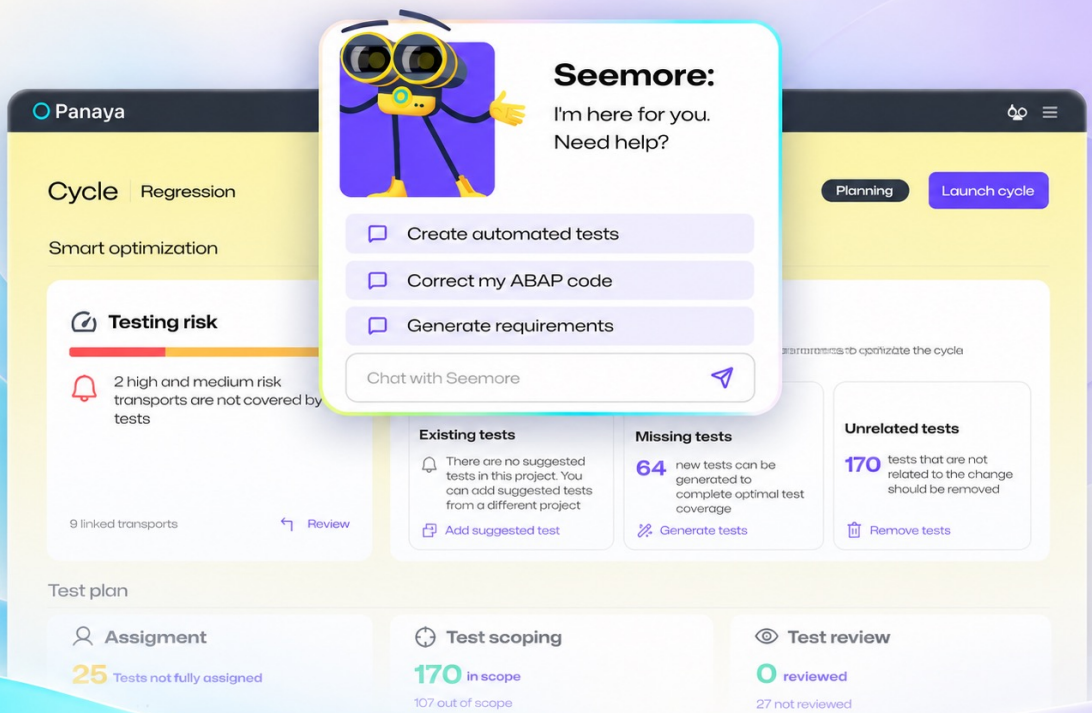
VERIFY OUTCOMES, NOT JUST ACTIONS

An AI agent can appear to complete a task successfully while producing the wrong business result. Enterprise testing must verify what actually happened across systems, permissions and approval rules.

UNDERSTAND IMPACT BEFORE CHANGE

Connected business processes require shared context. Understanding how changes affect applications, data and controls helps teams focus testing on the risks that matter.

In this ERP News Q&A, David Binny discusses the evolution of enterprise testing and why greater autonomy requires reliable evidence, clear boundaries and accountable release decisions.





DAVID BINNY

CEO,
Panaya

David Binny is CEO of Panaya and a former Chief Product Officer with two decades of experience across product management, technology, and go-to-market leadership. At Panaya, he leads the company's vision for agentic, impact-driven change in SAP and other enterprise applications.

Before joining Panaya, David held senior roles at NICE, including Head of Product Management for multi-channel recording and voice biometrics, and Director of Product Management for big data customer experience analytics. Earlier in his career, he led pre-sales, engineering, and technology leadership at NICE and RAD Data Communications. David holds an MBA from Tel Aviv University and a BSc in Computer Science from the Open University.

> *It means delegating more of the work without delegating accountability.*

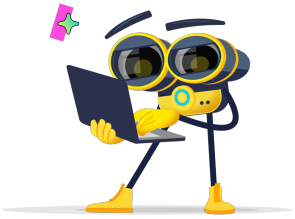
Q: The idea of the autonomous enterprise is moving quickly from vision to product strategy, particularly across ERP and other business-critical applications. What does an autonomous enterprise mean to you in practical terms, and how close are large organizations to operating this way today?

DAVID BINNY: An autonomous enterprise is not one that operates without people. It is one that can safely delegate defined business responsibilities to intelligent systems while people continue to set direction, establish boundaries, and remain accountable for the outcomes.

The level of authority matters. An agent reading an order status is very different from one creating a supplier, changing payment terms, or releasing a payment. Each step introduces a different level of business risk.

Most organizations are still at the beginning of this transition. They are introducing agents into contained processes, but few have consistent standards for deciding what an agent may do, what evidence it must provide, and when a person must intervene.

The organizations that progress fastest will not necessarily be those that pursue autonomy most aggressively. They will be those that build trust progressively, qualify agents for specific responsibilities, and expand their authority as the evidence supports it.



Q: Panaya argues that the autonomous enterprise cannot be supported by traditional testing alone. What fundamentally breaks in the conventional testing model when AI agents begin making decisions and executing work across ERP, CRM, and other enterprise applications?

DAVID BINNY: Traditional testing assumes relatively predictable behavior: provide the same input, follow the same process, and expect the same output. AI agents challenge that assumption. Their responses can differ and still be correct or appear convincing while producing the wrong business outcome.

That distinction matters in enterprise systems. If an agent applies the wrong payment term, skips an approval, or assigns inappropriate access, the process may appear to have completed successfully. The failure might only become visible at quarter close, during an audit, or after money has moved. Business processes often fail silently.

Testing therefore cannot stop at evaluating what the agent said or intended to do. It must verify what actually happened in the systems of record, whether the agent respected its permissions and approval rules, and whether it stopped when it encountered uncertainty. This requires testing built around business outcomes, risk, boundaries, and exceptions. Not only predefined scripts.

Q: Test automation has been evolving for years, but autonomous testing suggests something more significant than automating test execution. Where do you draw the line between automated testing, AI-assisted testing, and genuinely autonomous testing?

DAVID BINNY: Automated testing executes instructions that people have already defined. It can run the same tests repeatedly and efficiently, but it does not independently understand why those tests matter.

AI-assisted testing goes further. It helps people generate tests, analyze results, maintain automation, and identify patterns, while the user continues to orchestrate most of the process.
Autonomous testing begins when the platform can understand the objective and surrounding business context, determine what changed, assess what is affected, prioritize the relevant risk, generate or adapt the required tests, autonomously execute and validate them, and determine the next action within established controls.

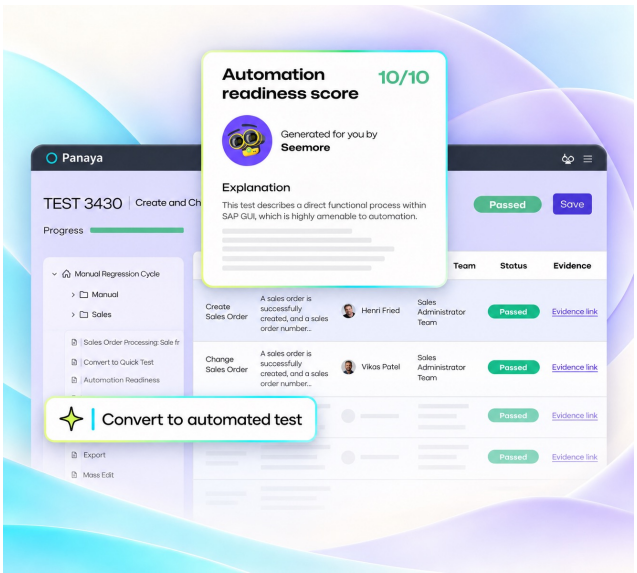
The business value is straightforward: teams can reduce unnecessary testing, eliminate much of the effort spent creating and maintaining scripts, and support more releases without adding equivalent headcount.

Autonomy does not mean removing people. It means delegating more of the work without delegating accountability. The platform handles scale, complexity, and repetitive decisions. People establish priorities, define acceptable risk, approve consequential outcomes, and intervene when judgment is required.

Q: As organizations give AI agents greater authority, how do they establish trust—and which decisions should remain subject to human approval?

DAVID BINNY: Trust should not come from how convincing an agent sounds. It should come from evidence that the agent can perform a defined business task, within approved limits, under realistic conditions. I think of that as qualification.
Organizations need to define what the agent may do, what it must never do, when it must escalate, and which outcomes must be verified before it receives production authority. That evidence should come from the systems where the work happens, not simply from the agent's account of its actions.

The level of human control should correspond to the potential consequence. Retrieving information may require limited oversight. Changing sensitive master data, approving financial activity, or affecting regulated processes requires stronger controls and explicit accountability.
When policy is ambiguous, evidence is incomplete, or the potential impact is material, the agent should not guess. It should stop, explain the uncertainty, and ask for a decision.





"AI can help produce and evaluate evidence,
but it should never lower the organization's acceptance standards on its own."

Q: Enterprise processes rarely live inside a single application. A seemingly small change in SAP, for example, can affect CRM, procurement, finance, and connected applications. How does this complexity change the way enterprises should approach testing and change impact analysis?

DAVID BINNY: The business process—not the individual application—must become the unit of quality.

A quote-to-cash process may begin in a CRM platform, continue through SAP, interact with tax or payment systems, and finish in reporting. Testing each application independently can show that every component works while still missing a failure in the end-to-end process.

That is why Change Impact Analysis must provide the factual foundation for testing. Before executing anything, organizations need to understand how a change moves across code, configurations, integrations, data, and business processes. Only then can they determine what needs attention, what should be tested, and what can safely be skipped.

It also means change impact analysis, test management, automation, and remediation cannot operate as separate islands. They need shared context and one source of truth. That is the principle behind Panaya's platform: understand impact first, then use that context to fix, test, and guide everything that follows.

Q: Enterprises will increasingly use AI agents to test systems and processes that are themselves being operated or changed by AI agents. Does this create a new category of risk, and what governance is needed when AI is validating the work of other AI?

DAVID BINNY: It creates a new governance challenge, but the answer cannot be to rely on one AI model's judgment of another.

Organizations need different forms of evidence. Critical outcomes involving money, access, master data, or approvals should be verified through hard checks against the relevant systems of record. More subjective outputs can be evaluated through a reasoning layer, but that layer must be calibrated against human-verified examples and governed acceptance criteria.

There must also be separation between execution and approval. An agent should not be able to perform an action, declare it successful, and independently accept the remaining risk.

Qualification cannot be permanent either. A model update, application release, permission change, or altered business rule can invalidate the original evidence without producing an obvious failure. Every relevant change should trigger an impact decision, followed by targeted requalification of the affected behavior. This avoids forcing teams to retest everything after every change, making continuous assurance practical at enterprise speed.

Q: Many enterprises are simultaneously managing major ERP transformations, cloud migrations, continuous releases, and pressure to adopt AI. Can autonomous testing genuinely reduce transformation risk and release cycles, or could greater automation encourage organizations to introduce change faster than their governance can absorb?

DAVID BINNY: Autonomous testing can reduce both risk and cycle time, but only when governance evolves alongside it. Speed without visibility simply allows an organization to create problems faster.
By automatically identifying what changed, prioritizing business-critical risk, and focusing testing where it matters most, organizations can reduce manual effort, shorten release cycles, and protect critical business processes as the pace of change increases.

Governance must also be proportionate. Requalifying every process after every update would eventually bring delivery to a halt. Ignoring the effect of change would expose the business to unacceptable risk. Change Impact Analysis provides the practical middle ground: understand what was affected and retest the relevant processes, controls, and agent behaviors.

Automation should remove repetitive work and improve the quality of release evidence. It should not allow teams to bypass accountability.

> "Speed without visibility simply allows an organization to create problems faster."



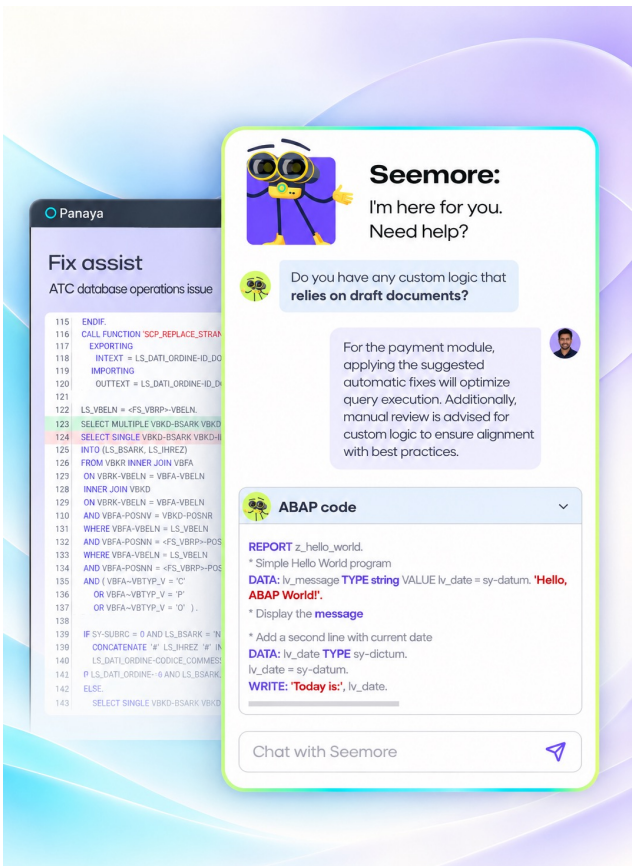
Q: If autonomous testing delivers on its promise, how will the role of QA and enterprise testing teams change? Do you expect these teams to become smaller, or will their value shift?

DAVID BINNY: Their value will shift significantly. I do not believe the most important outcome is simply smaller teams. It is teams with far greater capacity and a more strategic role.

A large amount of testing effort is still consumed by administration, coordination, script maintenance, documentation, and repetitive execution. As intelligent agents take on more of that work, quality teams can concentrate on business risk, end-to-end process coverage, governance, and the difficult exceptions that require human judgment.

The strongest quality professionals will increasingly combine technical understanding with knowledge of how the business operates. They will define risk policies, oversee autonomous workflows, challenge recommendations, and ensure that critical processes remain protected as the enterprise changes.

Quality engineering will become less focused on how many tests were executed and more focused on whether the organization has sufficient evidence to make a safe release decision.



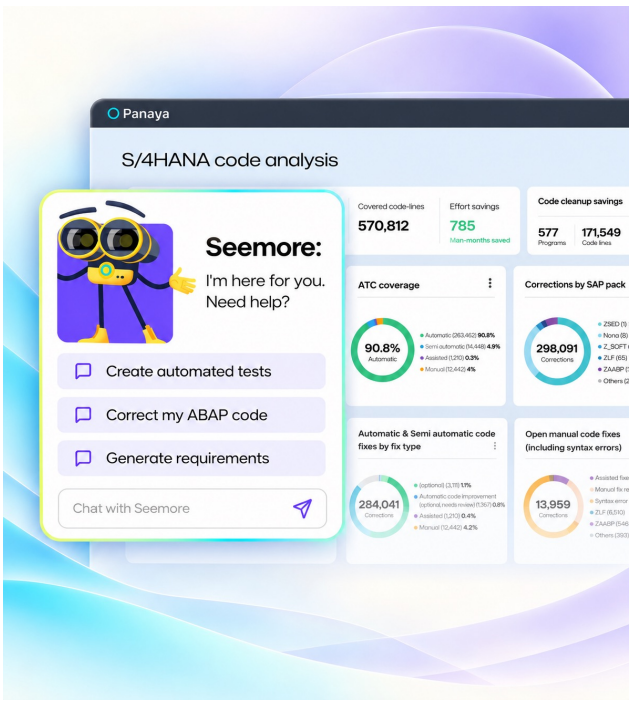
Q: Looking three to five years ahead, what will enterprise testing look like when agentic AI is embedded across ERP and other core business systems? Will testing remain a distinct stage, or become a continuous intelligence layer operating alongside the enterprise?

DAVID BINNY: Testing will become more valuable as a continuous qualification layer for the autonomous enterprise. There will still be explicit release decisions and human approvals for high-risk changes. But much of the work leading to those decisions: understanding impact, determining scope, generating and maintaining tests, executing validation, and collecting evidence, will happen continuously and increasingly autonomously.

Testing platforms will also retain organizational memory: what changed, why it changed, what was tested, what failed previously, and how similar risks were handled. That context will become essential as enterprise environments grow more complex and experienced specialists become harder to replace.

This is the vision behind Panaya's agentic platform and Seemore: one intelligent platform connecting Change Impact Analysis, Test Management, Test Automation, and Custom Code Correction. By bringing these capabilities together with shared business context, we enable enterprises to understand what matters, test what matters, and accelerate change with confidence.

The autonomous enterprise will require autonomous testing, but autonomy must always operate within boundaries defined by people.



ERP NEWS

EDITORIAL TAKEAWAY

The autonomous enterprise needs a dependable way to establish whether intelligent systems can be trusted with specific business responsibilities. That trust must rest on verified outcomes, clear authority and evidence from the systems where work actually happens.

David Binny's perspective makes the business process the unit of quality. Applications may work individually while the connections between them fail. Understanding change impact is therefore essential to deciding what needs testing and which risks require attention.

As AI agents take on more execution, assurance must remain independent. An agent should not perform an action, declare it successful and accept the remaining risk by itself. Human accountability and governed acceptance criteria remain fundamental.

Qualification must also evolve with the enterprise. Changes to models, applications, permissions and business rules can invalidate earlier evidence. Targeted requalification helps teams respond without repeating every test after every update.

This gives quality teams a more strategic role, centred on business risk, process coverage and safe release decisions. Their value increasingly lies in the strength of the evidence they provide.

Testing is becoming a continuous source of enterprise intelligence, preserving context and helping organisations accelerate change with confidence.

TRUST IN AUTONOMY DEPENDS ON VERIFIED OUTCOMES, CONTINUOUS QUALIFICATION AND HUMAN ACCOUNTABILITY.

RETHINKING ACCOUNTS RECEIVABLE IN THE AGE OF AI

George Kurdin, CEO and Co-Founder of Monk, discusses how AI agents are changing accounts receivable, why ERP integrity matters and where human judgment remains essential.

BEYOND RULES AND ROUTINE FOLLOW UPS

Accounts receivable depends on customer relationships, fragmented information and exceptions. Context aware AI agents offer a different approach to work that fixed workflows have struggled to handle.

FLEXIBLE THINKING. CLEAR LIMITS.

Greater autonomy requires clear boundaries. While agents handle routine activity, people retain control over commercial terms, financial concessions and sensitive customer decisions.

In this ERP News Q&A, George Kurdin explores autonomous collections, cash application and ERP integration, explaining what it takes to give AI more responsibility without compromising financial control.





GEORGE KURDIN

CEO & CO-FOUNDER, Monk

George Kurdin is CEO and Co-Founder of Monk, which develops AI agents for accounts receivable. His approach centres on helping finance teams manage the exceptions, fragmented information and customer interactions that have made AR difficult to automate.

In this interview, he discusses how agents can support collections, cash application and invoice submission while operating within clear boundaries. He also explains why reliable ERP integration, traceable actions and human judgment remain essential as finance teams give AI more operational responsibility.

> *The thinking is flexible. The authority is not.*

Q: Accounts receivable has historically remained more dependent on spreadsheets, inboxes and manual processes than many other areas of finance. Why has AR proved so difficult to automate effectively, and what can AI address today that previous generations of automation could not?

GEORGE KURDIN: Start with the size of the problem. More than $10T is stuck in unpaid invoices around the world. DSO has climbed into the high 70s in most industries since the supply chain shocks. That is cash sitting in someone else's bank account.

AP is a ledger problem. The inputs are yours. One process, start to finish, under your control. AR is a relationship problem. The inputs come from another company: their portal, their remittance format, their approvals, their inbox. Every customer is a different system. Rules need things to stay the same shape. In order-to-cash, nothing does. So teams stayed on spreadsheets and email, because those take anything you throw at them.

And the work is exceptions. Exceptions eat the day. Exceptions drive DSO. Each one needs its own approach and real thinking about that account, that short-pay, that deduction. You can't write that down in advance.

Here is what changed. We now have agents that can work a problem over a long stretch and hold a lot of context. One agent can carry the whole history of an issue across email, portals, the ERP and call notes, then use tools to go do the work. That did not exist three years ago.
Solve exceptions properly and automation finally means something to the person doing the job. That is what we work on at Monk.

Q: Much of traditional AR automation has focused on predefined workflows and rules. What changes when AI can interpret the context of a customer interaction or payment situation and determine what should happen next, rather than simply follow a fixed sequence?

GEORGE KURDIN: A workflow engine holds what you expected to happen. AR is mostly exceptions. So a rules tree with 200 branches tells you the problem was never rule-shaped.
What changes is that the system acts on what is true today. They short-paid two invoices by a freight charge. They are mid-renewal. They have filed two deductions before. Instead of sending dunning step 4 on day 31.

What does not change is the set of things it is allowed to do. The agent picks from a fixed list of actions, each with hard guardrails. The thinking is flexible. The authority is not. We call it boring agents by design.

Q: Intelligent Collections is one area where agentic AI is already taking on more responsibility. Where do you draw the boundary between work that an AI agent can handle autonomously and situations that should be escalated to an AR professional?

GEORGE KURDIN: It depends on the business and the segment. A staffing agency billing through VMS portals, a mid-market software company with 40 big accounts, and an SMB with 800 small invoices carry very different risk. We set this per customer.

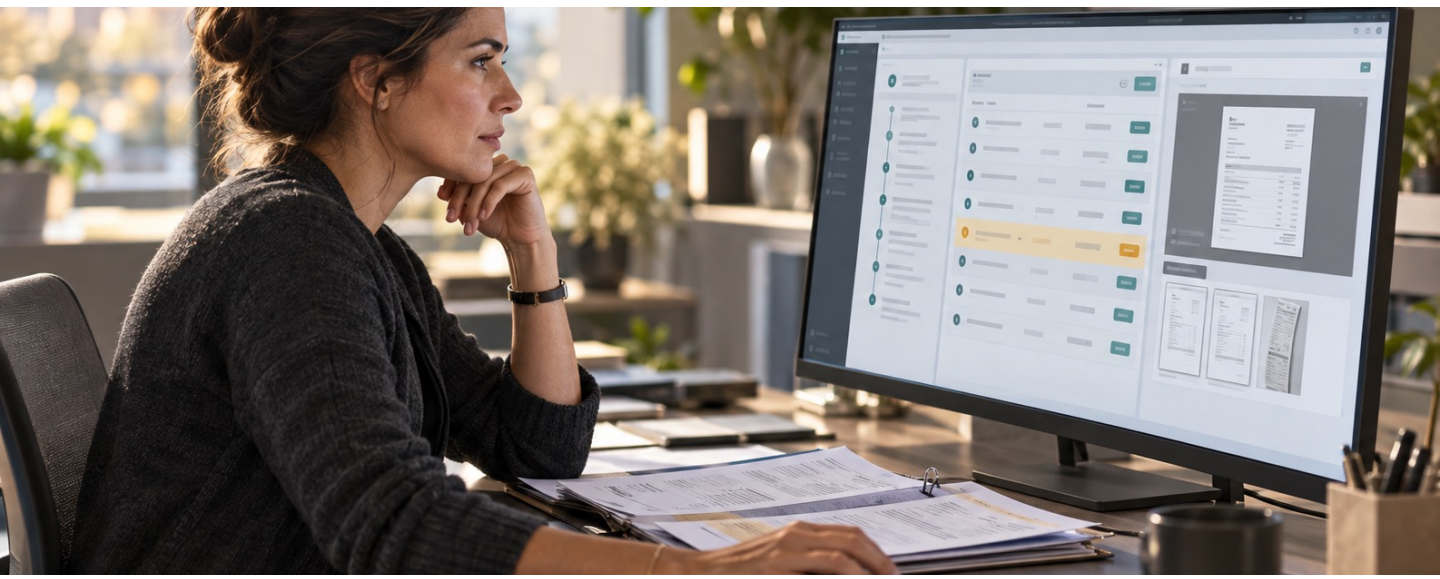
Above that, you can generalize. Draw the line at reversibility and money.

The agent handles anything you can undo without much damage. Reminders, chasing remittance advice, matching payments, submitting invoices to portals, research, passing work to the right person inside the company.

A person handles anything that changes a commercial term, gives up money, or spends goodwill. Write-offs, payment plans, discounts, credit holds, legal.
One thing worth saying: in mid-market and SMB, the agent can do more than people assume. Smaller invoices, more repeatable payer behavior, less politics per account. A lot of that book can run without anyone touching it.

The second line is confidence. Below the threshold, the agent stops and hands the work over with everything already gathered: history, how this payer behaves, a draft reply. Escalation is not a failure. It is routing. Most teams escalate badly today because the context shows up empty.

> *"Escalation is not a failure. It is routing."*
>
> GEORGE KURDIN



Q: If automation handles more routine collection activity, the cases reaching people are likely to be the more complex ones — disputes, unusual payment behavior, sensitive customer relationships or exceptions. Does greater automation ultimately make human judgment more valuable in AR rather than less important?

GEORGE KURDIN: Yes. We want to help people, not replace them. Take the best person on the AR team and make them better. Judgment dies in a queue of 300 follow-ups. It gets sharper with time and room to think. Give both back and people do the work that matters: run the book, work the real disputes, restructure a payment plan, decide which customer can take pressure this quarter.

Credit management is the clearest case. Good credit work is judgment plus data. Who pays, who does not, who is about to stop paying everyone. The policy needs a person. The edge comes from data most teams never see: how a customer pays across a whole network, not just your own aging report. Give a good credit manager both and they stop problems instead of chasing them.

Q: Cash application presents a different automation challenge. Partial payments, consolidated remittances, missing references and payments covering multiple invoices or entities can introduce significant ambiguity. What makes these scenarios difficult for conventional automation, and how is AI improving the ability to resolve them?

GEORGE KURDIN: Two problems in the old world.
First, the rules are weak. Match the string, match the amount, against open invoices. That breaks on a wire covering 14 invoices across two entities, short-paid for a credit memo, with the remittance advice in a scanned PDF in someone's inbox.

Second, there is nothing behind the rules. The algorithm clears some share and hands the rest to the team to work from scratch. No partial credit. No head start. That is why the auto-match rate on the slide looks fine while the team is still drowning.

Our engine clears a much larger share straight through. We do not force a match. We only apply at full confidence, because cash applied wrong is worse than cash not applied. For what is left, the engine suggests ranked matches with the evidence attached. The team checks an answer instead of starting cold. That is how touchless cash application gets to a number that means something.

Q: Your contributed ERP News feature looks closely at what happens when AR automation has completed its work and the result has to land correctly back in the ERP. From a broader architectural perspective, how should companies think about the relationship between the ERP as the financial system of record and the increasingly intelligent automation layer operating around it?

GEORGE KURDIN: The ERP is the system of record. It stays the authority. The layer above it holds no competing version of the truth. It proposes. The ERP decides.

What that takes is an integration that never breaks, and this is the part nobody wants to talk about. You have to send accurate data. You cannot flood it. You need health checks at every stage of the sync. Every write has to be safe to repeat, traceable to who made it, and possible to undo. Reconcile as you go, not at month end.

The work varies a lot by system. NetSuite, SAP and Dynamics are each their own craft. Modern APIs, but different data models, different limits, different ways of failing. Then you hit something like Sun Systems, where there may be no API and no documentation, and you are solving a different problem. Any vendor who lists "integrates with your ERP" as one line has not done the work.

Building these integrations is an art. It takes real engineering time and it does not demo well, which is why most products are thin here. None of the reasoning matters if the sync is wrong. The books still close in the ERP.





Q: A large part of invoice-to-cash activity also takes place outside the ERP — through customer emails, remittance documents, AP portals, payment systems and conversations. Is connecting and interpreting this fragmented environment becoming as important as integrating with the ERP itself?

GEORGE KURDIN: Yes. Extremely important.
ERP integration has an end, at least on modern systems. The outside world does not: thousands of AP portals, email threads, payer formats and bank files with no spec.

We are pushing hard to automate it. Invoice uploads into Coupa, Ariba, Tipalti. VMS portals for staffing agencies. Those cut DSO directly. Much of it is now possible with a smart mix of deterministic systems and AI. We are far from done, but I am proud of what we have shipped for customers so far.

Q: As AI and automation take on more operational work across collections, cash application, invoice submission and routine follow-up, how do you expect the role of AR professionals to change? What skills become more important when people spend less time executing repetitive processes?

GEORGE KURDIN: From doing the work to overseeing it and negotiating.

What becomes more valuable: judgment on exceptions, resolving disputes and deductions, credit management, reading an audit trail well enough to catch the system being wrong, and enough comfort with data to question a number.

Collections starts to look like managing a portfolio rather than working a list. The analyst who can restructure a payment plan with a big account is worth several who can send dunning emails fast.

Q: Finance sets a particularly high bar for AI because an incorrect action can affect cash, accounting records and customer relationships. What should CFOs look for in terms of accuracy, auditability, controls and human oversight before trusting AI with more of the invoice-to-cash process?

GEORGE KURDIN: Security. This is customer financial data moving between systems. The controls should be plain and easy to check.

Accuracy and precision, reported by action type, with the confidence threshold published. Not one blended number. 95% across everything hides the 60% on the thing that matters. Same with auto-match rate — ask what happens to the rest.

An audit trail. Every action traces back to what it saw and the rule that allowed it.

A staged rollout. Shadow mode, then suggest and approve, then autonomous inside set bounds. Measured at each step.

And hard dollar ROI. It is time to see real money from AI. Saving time, running leaner, getting better reporting — not enough on its own. Revenue up or cost down. With $10T stuck in unpaid invoices and DSO in the high 70s, the return here shows up in days of working capital. That is part of why we like this space. Ask for the number and refuse the soft ones.

Q: Looking three to five years ahead, how autonomous do you think invoice-to-cash can realistically become? Which parts of AR do you expect to become largely automated or autonomous, and where do you believe human involvement will remain essential?

GEORGE KURDIN: Cash application goes first. Most structure, clearest feedback. Then invoice submission and portal work. Then routine dunning. Disputes and deductions go automatic on the research and stay human on the call.

Human work stays: credit strategy, negotiation, write-offs, and anything where the relationship is worth more than the invoice.

But people are bad at seeing power laws, so this will move faster than expected. A number of our mid-market customers already run collections on full autopilot. That did not happen by flipping a switch. It came from working with their team on operating procedures, getting clean data into the ERP, and building the harness around the agent. Once that is in place, the agent runs the book. It is in production, not on a slide.

Build AI that is reliable, secure and made for AR, and I think we will all be impressed by where this goes.



ERPNEWS

EDITORIAL TAKEAWAY

Accounts receivable remains difficult to automate because its work extends beyond the ledger. Customer communications, payment documents, external portals and commercial relationships all shape what happens next.

George Kurdin places exceptions at the centre of the AI opportunity. Agents can gather context and handle routine actions, giving professionals more time for disputes, credit decisions and negotiation.

Greater autonomy, however, requires clear limits. Financial concessions, commercial terms and sensitive relationships need defined controls and human judgment.

ERP integration is equally fundamental. Automation must return accurate, traceable results to the system of record. Strong reasoning cannot compensate for incorrect accounting entries.

Finance leaders should look beyond headline automation rates. Accuracy by action type, audit trails, staged deployment and measurable financial outcomes provide a stronger basis for trust.

The future of AR depends on combining contextual intelligence with dependable execution, while giving people the visibility and authority to intervene.

AUTONOMY EARNS TRUST THROUGH CLEAR LIMITS, RELIABLE ERP RECORDS AND HUMAN OVERSIGHT.

AUTONOMOUS FINANCE, HUMAN GOVERNED

Jean-Jacques Bérard, Chief Product and Technology Officer at Esker, explains how AI agents can resolve exceptions and coordinate finance processes across ERP environments, with clear boundaries around every action they take.

ESKER®

WHERE RULES REACH THEIR LIMIT

Missing information, unexpected exceptions and conversations across departments still demand considerable human effort. Esker's approach extends automation into this work, combining AI reasoning with transaction context and the ability to coordinate the next steps.

INTELLIGENT REASONING. CONTROLLED EXECUTION.

An agent's recommendation must pass through permissions, validations and approval boundaries before becoming a financial action. Bérard outlines an approach in which autonomy grows according to risk, while consequential decisions remain subject to human judgment or explicit authorization.

A NEW LAYER AROUND ERP

Esker's Synergy Agentic Framework coordinates finance workflows across ERP environments, combining conversational access with governed execution. As agents handle more routine work, finance professionals can focus on judgment, risk and strategic decisions.





JEAN-JACQUES BÉRARD

Chief Product and Technology Officer, Esker

Jean-Jacques Bérard is Chief Product & Technology Officer at Esker. In this role, he is responsible for implementing the company's product strategy and overseeing product planning and development. Jean-Jacques joined Esker in 1995 as Project Leader for the SQL team and later moved to Research and Development Manager in 1997. In 1998, he was appointed Vice President of Research and Development, and in 2025, he assumed his current role. Prior to Esker, Jean-Jacques was R&D team Manager at Arthur Andersen Consulting in Lyon. Jean-Jacques received his engineering degree in 1988 from the Lyon Institut National des Sciences Appliquées, France.

> *As the potential impact increases, so should the level of oversight.*

Q: Finance has been automating repetitive work for decades. What fundamentally changes when organizations move from rules-based automation to AI agents that can reason, make decisions and take action across a finance process?

Jean-Jacques Bérard: The change is not that rules-based automation disappears. It is that automation can now address the work that begins when the predefined rules stop.

Traditional automation is extremely effective when every path and outcome can be anticipated. But a significant amount of finance work remains manual because it involves exceptions, missing information, unstructured communications or coordination across people and systems. Agents can investigate those situations, gather the relevant context, determine the appropriate next step and move the process forward.

This is exactly the gap Esker's Synergy Agentic Framework is designed to close. It adds reasoning, orchestration and controlled autonomy to Esker's existing Synergy AI and trusted transactional platform. Rather than introducing disconnected AI assistants, it brings together specialized Business Agents, Conversational Finance, business rules, governance and performance intelligence within one operating layer.

In simple terms, rules automate the known path; agents address the long tail of exceptions, information gathering and coordination.

Q: Esker talks about "Governed Autonomous Finance." As AI agents gain greater autonomy across Source-to-Pay and Order-to-Cash, what should remain firmly under human control, and where do you believe organizations can safely allow agents to act independently?

Jean-Jacques Bérard: Governed Autonomous Finance does not mean unrestricted autonomy. People must remain in control of the objectives, policies, risk appetite, permissions and approval boundaries within which agents operate. Decisions with significant financial, legal, regulatory or customer consequences should remain subject to human judgment or explicit authorization.

Our recently launched Global Finance AI Trust Index shows why that distinction matters. For example, the research found that while 61% of finance leaders believe AI should be able to autonomously approve routine supplier invoices that meet predefined rules, 40% believe AI should not allocate headcount or hiring budgets. AI therefore cannot operate with one level of authority across every finance decision.

Agents can safely operate more independently on activities such as classification, routing, complex data extraction, account coding, anomaly detection, prioritization and routine follow-up. They can gather status information from internal stakeholders, prepare responses and recommendations or coordinate the next steps in a workflow.

The appropriate level of autonomy should depend on the impact and reversibility of a potential error. If an action has limited consequences, can be reversed or can be independently validated through deterministic controls, a higher level of autonomy is appropriate. As the potential impact increases, so should the level of oversight.

The Synergy Agentic Framework makes that autonomy progressive and policy-based. Identity, permissions, business rules, approval thresholds, evaluations and audit trails govern when an agent may act and when it must escalate to a person.

> ***"Business context and governed tools allow an agent to produce a relevant, traceable and actionable business outcome."***

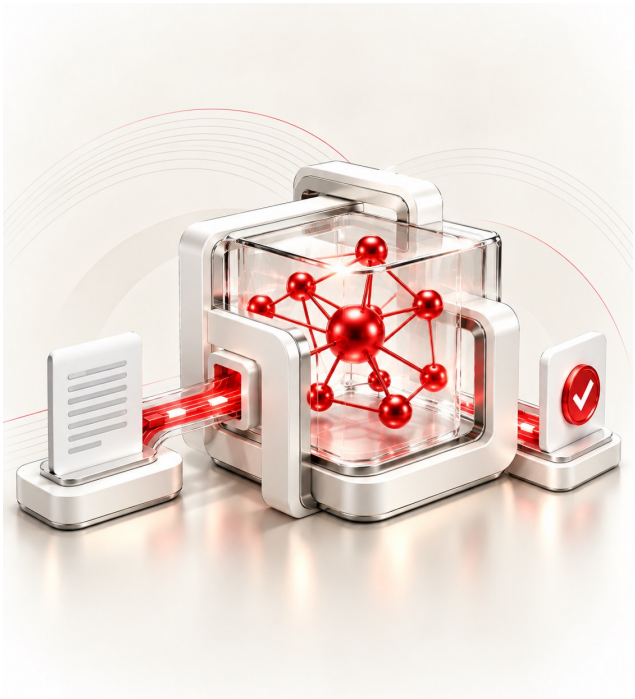
Q: You've said that the value of an AI agent comes not from the model alone, but from combining intelligence with trusted transaction context, business rules and governed execution. What does that business context enable an AI agent to do that a general-purpose AI model cannot?

Jean-Jacques Bérard: A general-purpose model may understand the language of finance, but it does not understand how finance operates inside a particular company. It does not inherently know the customer's suppliers, approval matrix, chart of accounts, credit policy, transaction history or the meaning of a specific status within its ERP.

Trusted business context changes that. It allows an agent to interpret a document or request in relation to the actual transaction, the parties involved, the applicable policies and the current state of the process. It can determine whether something is a legitimate exception, retrieve the right supporting information, select the correct workflow and use the appropriate system tools.

The Synergy Agentic Framework combines Synergy AI with that trusted Source-to-Pay and Order-to-Cash context. It also gives agents the skills needed to navigate customer systems and interact with the Esker platform within clearly defined permissions.
A model alone can generate a plausible answer.

Business context and governed tools allow an agent to produce a relevant, traceable and actionable business outcome.





INTELLIGENT ORCHESTRATION, CONTROLLED EXECUTION

Q: Esker describes its approach as combining probabilistic AI reasoning with deterministic financial execution. How do you technically and operationally prevent an AI-generated judgment from becoming an incorrect payment, approval, credit decision or accounting action?

Jean-Jacques Bérard: Our fundamental design principle is that reasoning may be probabilistic, but financial execution must remain deterministic.

We continue to use deterministic automation and specialized AI wherever they can solve the problem reliably. Probabilistic reasoning is introduced when a process involves ambiguity or complexity that traditional automation cannot adequately address.

Even then, reasoning and execution remain separate. An agent may analyze a situation, recommend a classification or propose the next action, together with its explanation and supporting evidence. Before anything is executed, the platform applies identity and permission checks, business rules, validations, tolerance levels and approval boundaries.

If the confidence is insufficient, the situation falls outside policy or the potential consequences are significant, the case is escalated to a person. Once an action is approved, it is executed through the controlled transactional workflows of the Esker platform and recorded in the audit trail.

An agent is therefore never given a blank cheque. Its reasoning is useful because its ability to act remains bounded, controlled and traceable.

Q: Esker integrates with more than 70 ERP solutions and positions its platform as complementary to ERP rather than a replacement for it. As agentic AI becomes more capable, how do you see that relationship evolving? Which responsibilities should remain with the ERP, and which are likely to move into an intelligent orchestration layer around it?

Jean-Jacques Bérard: The ERP will remain the authoritative system of record for core financial data, accounting entries and transactional integrity. Agentic AI does not change that fundamental role.

What changes is the amount of work that can be managed intelligently around the ERP. Much of the effort involved in completing a finance process takes place outside it: interpreting documents, searching for information, resolving exceptions, exchanging emails, obtaining approvals and coordinating with customers, suppliers or colleagues.

Information is also increasingly distributed across multiple ERPs, procurement systems, CRM platforms, data services and collaboration tools. The intelligent orchestration layer must bring that context together and coordinate the work across those environments.

This is where Esker is particularly well positioned. Its Connectivity Suite already integrates with more than 70 ERP solutions, while the Synergy Agentic Framework adds the reasoning and orchestration needed to manage broader sequences of work.

The ERP records the financial truth. Esker helps ensure that all the work required to create and maintain that truth happens faster, more consistently and under the appropriate controls.

Q: Many large organizations operate multiple ERP environments, particularly after acquisitions. Does agentic AI offer an opportunity to create a common finance experience across fragmented ERP estates without requiring organizations to first consolidate those underlying systems?

Jean-Jacques Bérard: Yes. This is one of the most compelling near-term use cases for agentic AI. Process harmonization no longer needs to wait for ERP harmonization.

That is important because the systems behind finance are already creating barriers to greater AI adoption. Our AI trust index found that 42% of finance leaders cite insufficient integration between finance systems and AI tools as a challenge preventing them from expanding AI's role in finance decision-making. Organizations need a way to overcome that fragmentation without waiting for every underlying system to be consolidated.

An intelligent orchestration layer can provide that bridge. Through its Connectivity Suite and Synergy Agentic Framework, Esker can provide a common layer of process, governance, visibility and user experience across different ERP environments. Agents can understand the user's intent, retrieve information from the relevant system and translate an authorized action into the system-specific operation required by each ERP.

This is especially valuable following acquisitions, when an organization may need to operate as one finance function long before it can rationalize its technology landscape. Esker can standardize workflows, controls, KPIs and interactions while allowing the underlying systems to remain in place.

That does not necessarily remove the long-term rationale for ERP consolidation. It does, however, decouple business transformation from the duration and risk of that consolidation. Organizations can start delivering a consistent finance experience and realizing value immediately.

Q: Conversational Finance introduces another potential change: employees may increasingly ask for information, initiate workflows or respond to approvals through natural language rather than navigating traditional enterprise application screens. Could AI eventually become the primary interface between finance professionals and ERP systems?

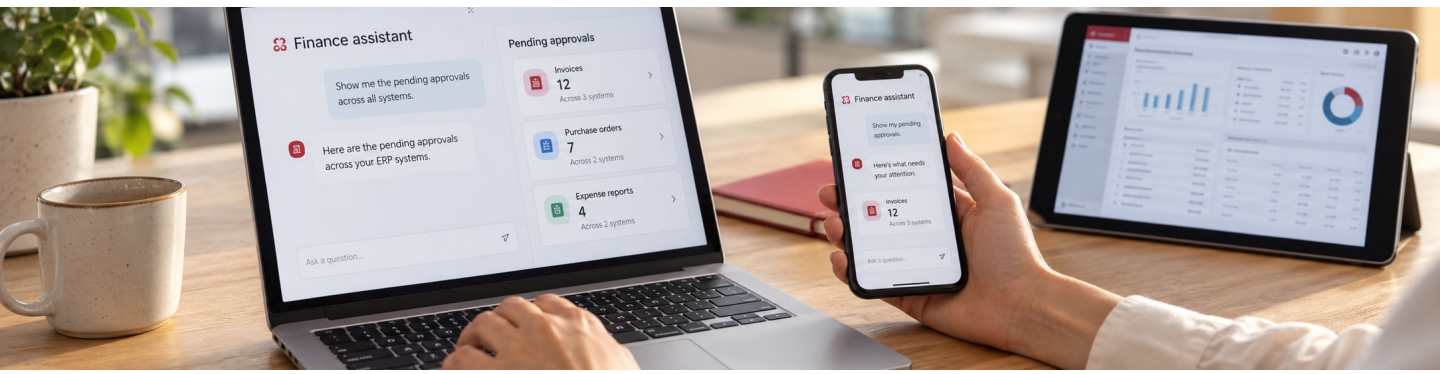
Jean-Jacques Bérard: Yes, but it will not happen at the same speed for every type of user.

For casual users, AI can become the front door to finance relatively quickly. An employee who occasionally needs to check an invoice, initiate a purchase request, approve a transaction or answer a finance-related question should not have to learn several complex applications. Through Conversational Finance, users can express what they need in natural language, and the Synergy Agentic Framework can connect that request to the correct context, workflow or Business Agent.

The interaction can also be proactive and bidirectional. The platform can contact a user when an approval, clarification or confirmation is required, rather than waiting for that person to find the relevant task in an application.

For finance professionals who use ERP systems intensively, however, specialized interfaces will remain important for longer. These users need dense information, advanced controls and purpose-built screens for reconciliation, bulk operations, configuration and complex exception management. AI will initially augment those professional interfaces rather than replace them.

We therefore expect a hybrid model: conversational experiences and enterprise super-apps will become the primary interface for casual users, while finance professionals retain a rich workbench enhanced by AI. SaaS may become increasingly headless at the edges, but its professional interfaces will continue to play an important role at the core.



ACCOUNTABILITY ACROSS THE AGENT ECOSYSTEM

Q: Esker is supporting connectivity with enterprise AI and external agents through APIs and emerging standards such as MCP and A2A. If a company eventually has agents from its ERP vendor, finance platforms and other enterprise applications interacting with one another, how do we establish identity, permissions and accountability for an action that may pass through several agents before execution?

Jean-Jacques Bérard: A multi-agent environment is only trustworthy if identity, authority and provenance travel with every request.

Each agent should have an explicit enterprise identity, a defined purpose and narrowly scoped permissions. It must also be clear whether the agent is acting on behalf of a person, another system or an automated process. Delegating a task to another agent must never result in an unintended expansion of authority.

The complete chain must remain traceable: who initiated the request, what outcome was requested, what information was accessed, which policies were applied, which agents participated, which approvals were obtained and which system ultimately executed the action.

MCP and A2A can standardize how agents interact, but they do not replace identity management, policy enforcement or accountability. Those responsibilities belong to the governed execution layer.

This is an important differentiator of the Synergy Agentic Framework. Esker can expose selected finance capabilities to enterprise AI and external agents while keeping identity, permissions, business policies and resulting financial actions governed within Esker. External agents consume controlled capabilities rather than receive direct access to protected transactional systems.

Another ecosystem may own the initial user experience, but Esker can remain the governance and execution anchor for the finance process.

> ***"A multi-agent environment is only trustworthy if identity, authority and provenance travel with every request."***

Q: Esker emphasizes that customer data remains protected and is not used, saved or shared by third parties through its Synergy GPT functionality. As finance teams become more comfortable giving agents access to sensitive transactional data, what questions should CFOs and CIOs be asking vendors about data boundaries, model governance and auditability before allowing those agents to act?

Jean-Jacques Bérard: They should start with the data boundary. What data can the agent access? Where is it processed? Is it retained, shared with a third party or used to train a model? Which models, subprocessors and hosting regions are involved, and how is customer data isolated?

They should then examine model governance. Which model is being used for each task? How are models, prompts, tools and policies evaluated, versioned and deployed? What happens when a model changes? How does the vendor monitor performance, detect drift and manage failures or unexpected behavior?

The next question concerns authority. How are permissions scoped? Can an agent's access be revoked immediately? Which actions require deterministic validation or human approval? Can the organization set different autonomy levels according to process, amount, risk or user?

Finally, every material action must be reconstructable. The audit trail should show what the agent saw, what it recommended, why it reached that conclusion, which tools it used, what policy was applied, who approved the action and what was ultimately executed.

Esker's position is clear: its Synergy GPT capabilities are designed so that customer data remains protected and is not used, stored or shared by third parties. The Synergy Agentic Framework extends that approach by embedding identity, permissions, approval boundaries, evaluation and auditability into the agentic operating layer.

The real test is not whether a vendor simply says its AI is secure. It is whether the vendor can prove the boundaries and reconstruct every consequential action.

Q: Looking three to five years ahead, what does a genuinely autonomous Office of the CFO look like to you? If agents are handling more routine execution, monitoring and coordination, how will the roles of finance professionals change and what will humans spend more of their time doing?

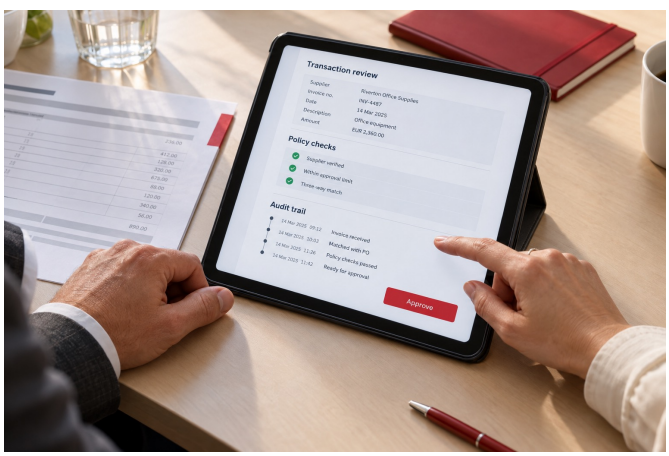
Jean-Jacques Bérard: A genuinely autonomous Office of the CFO will not be a human-free finance function. It will be one in which digital workers take responsibility for a significant share of routine execution, monitoring and coordination across Source-to-Pay and Order-to-Cash.

Business Agents will manage recurring tasks and exceptions, while Conversational Finance will make those capabilities accessible across the organization. I also expect managerial agents to emerge: agents that continuously analyze process performance, identify bottlenecks and recommend improvements.

Esker's Data Lake and Benchmark Intelligence provide an important foundation for that evolution. Operational KPIs, performance history and anonymized peer benchmarks can help both agents and finance leaders identify gaps and measure whether proposed changes are delivering results.

Finance professionals will spend less time processing tasks and more time exercising judgment, managing risk, advising the business, negotiating with customers and suppliers, and making strategic decisions. Their role will increasingly include designing policies, supervising digital workers and deciding which agent-generated improvements deserve investment.

People will remain in control of objectives, policies and consequential decisions. The autonomous Office of the CFO will therefore be self-running for routine work and increasingly self-improving in its insights, but it will remain human-governed in its purpose and its impact.



ERPNEWS

EDITORIAL TAKEAWAY

Autonomous finance requires a dependable connection between intelligence and action. **Agents** must understand transactions, applicable policies and the limits of their authority. **Trust** rests on the controls that turn reasoning into reliable financial outcomes.

Jean-Jacques Bérard's perspective places this distinction at the center of **Esker's approach**. AI can investigate ambiguity and recommend the next step. Financial execution remains governed by permissions, validations and approval boundaries, with consequential decisions subject to human judgment or explicit authorization.

The **ERP** remains the authoritative financial record. An orchestration layer around it can coordinate documents, communications and exceptions, helping organizations harmonize finance processes across different ERP environments.

Conversational Finance can simplify occasional tasks, while specialists retain the detailed interfaces they need. Across both experiences, identity, delegated authority and consequential actions must remain traceable.

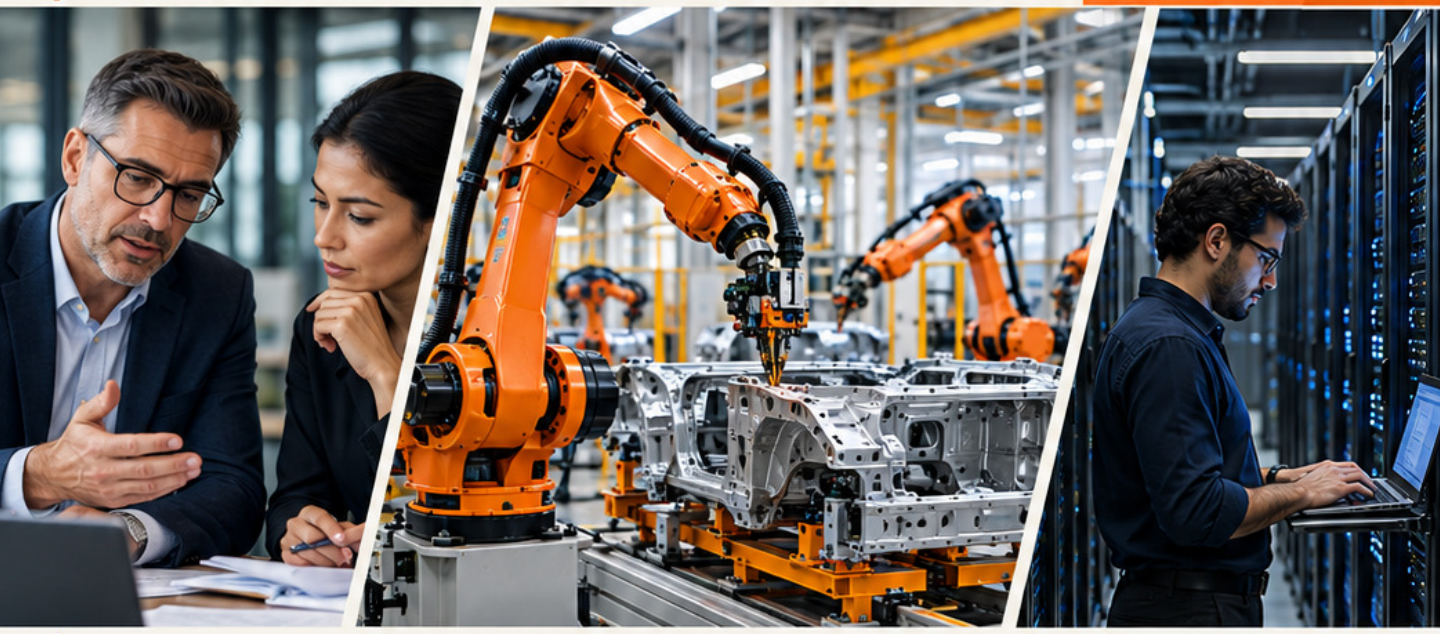
As agents assume more routine work, finance professionals can focus on judgment, risk, relationships and strategy. Their responsibilities will increasingly include defining policies, supervising digital workers and assessing improvements.

For CFOs and CIOs, vendor evaluation must reach beyond model capability. Data boundaries, permission controls, model governance and audit evidence determine whether autonomy can be trusted with real financial responsibilities.

AUTONOMOUS FINANCE DEPENDS ON TRUSTED BUSINESS CONTEXT, CONTROLLED EXECUTION AND HUMAN ACCOUNTABILITY.

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HOW ERP-DRIVEN COST REMOVAL REACHES A MANUFACTURER'S MARKET CAP

Lasting operational savings can influence more than a manufacturer's margins. This analysis explores how verifiable ERP-driven improvements can translate into earnings growth, released cash and implied equity value.

Article By Ellen Rothschild | Rootstock Software

Public markets distinguish sharply between the two kinds of good news a manufacturer can report. One-time gains (e.g., a favorable settlement, an inventory sell-through, a period of unusual pricing) are acknowledged and then looked through. Structural cost removal is different: when the mechanism behind a margin improvement is visible and repeatable, analysts carry it into out-year models, and it is capitalized into the multiple.

That distinction determines what an ERP system is worth to shareholders. In the illustrative case below, for a $500 million revenue manufacturer earning $35 million of net income at an 18x multiple, 100 basis points of operating margin expansion is associated with **$67.5 million of implied market capitalization and 10.7% EPS accretion**, with the multiple held flat.

In this article, the last of three, we examine which improvements meet the durability test, what the same earnings accretion would cost through any other route, and why forecast credibility has a valuation consequence of its own.

THE TEST IS DURABILITY, NOT SIZE

A target without a mechanism is a forecast. A target with a named, structural mechanism behind it is an operating model change, and is treated as one. This is why composition matters more than magnitude: $5 million of operating income improvement attributed to “efficiency initiatives” is not modeled forward, while the same $5 million attributed to specific structural changes generally is.

THE ILLUSTRATIVE CASE: ACME INDUSTRIES

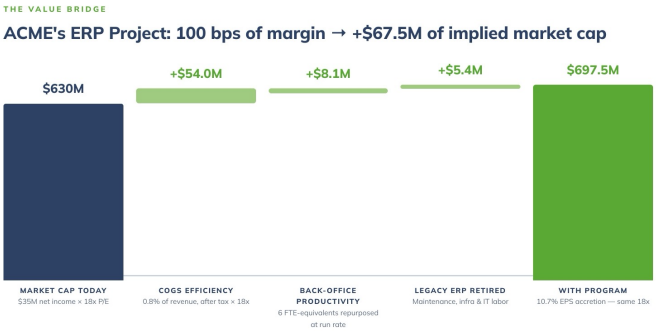
ACME Industries is a publicly traded manufacturer: **$500 million of revenue, $35 million of net income, and a $630 million market capitalization at an 18x multiple**. It runs an aging on-premise ERP and carries $80 million of inventory (~16% of revenue). Every ninety days, management is required to demonstrate margin expansion and EPS growth, and to defend guidance built on operational data it does not fully trust.

One hundred basis points, with a mechanism behind each part

ACME’s ERP program delivers $5 million of operating income improvement, 100 basis points of margin, from three structural sources:

- **0.8% of revenue in COGS efficiency**, from real-time production, inventory and procurement data in a single ERP system.
- **Six back-office FTE-equivalents of capacity repurposed**, as reconciliation and manual reporting effort is redirected to analysis and control work.
- **The legacy ERP estate retired**, including maintenance, infrastructure and the IT labor attached to it.

Taxed at a 25% blended rate and capitalized at a held-flat 18x, those three contribute **$54.0 million**, **$8.1 million** and **$5.4 million** of implied market capitalization: **$67.5 million** in total, taking ACME from $630 million to $697.5 million. Because each mechanism is structural rather than episodic, the 100 basis points are durable, which is what lets an analyst extend them beyond the guidance period.



What the same accretion costs any other way

For a CFO, the figure that frames the decision is **10.7% EPS accretion**, achieved with no buybacks, no revenue growth and no multiple expansion.

Acquiring 10% of EPS requires an acquisition premium and integration risk, and takes time to realize. Repurchasing it deploys cash that is then unavailable for growth, and does nothing to the operating business. ERP-driven cost removal is the only route to that level of accretion that also leaves the company operating better than before, and the only one that improves the quality of the earnings as well as the quantity.

Cash the balance sheet can redeploy

ACME’s **$80 million of inventory, at 16% of revenue**, reflects the same buffering described earlier in this series. Real-time ERP visibility and MRP-driven planning release approximately 15% of that position: **$12 million of free cash flow**.

That cash funds buybacks, dividends or growth investment, and it improves return on invested capital from both directions at once: invested capital contracts while operating income rises. As elsewhere in this series, the release is presented alongside the earnings bridge rather than capitalized at the multiple.



The multiple is held flat on purpose

The 18x multiple used throughout is held constant from beginning to end, and sits below published industrial sector averages. No re-rating is claimed, even though the argument of this article, that durable cost removal reads as earnings quality, is precisely an argument for one.

That is the discipline applied across all three articles: bottom-of-band benchmarks, mid-band rather than top-of-band multiples for the founder case, a flat exit multiple for the sponsor case, and one-time cash never run through a multiple anywhere. The figures are intended as a floor.

Conclusion

This series describes one ERP project valued three ways. A founder is paid a multiple on it once, and paid again through a multiple that re-rates on every existing dollar of earnings. A sponsor sees it flow undiluted into equity because the acquisition debt is fixed. A public company sees it taxed, capitalized at a price-to-earnings multiple, and reflected in EPS.

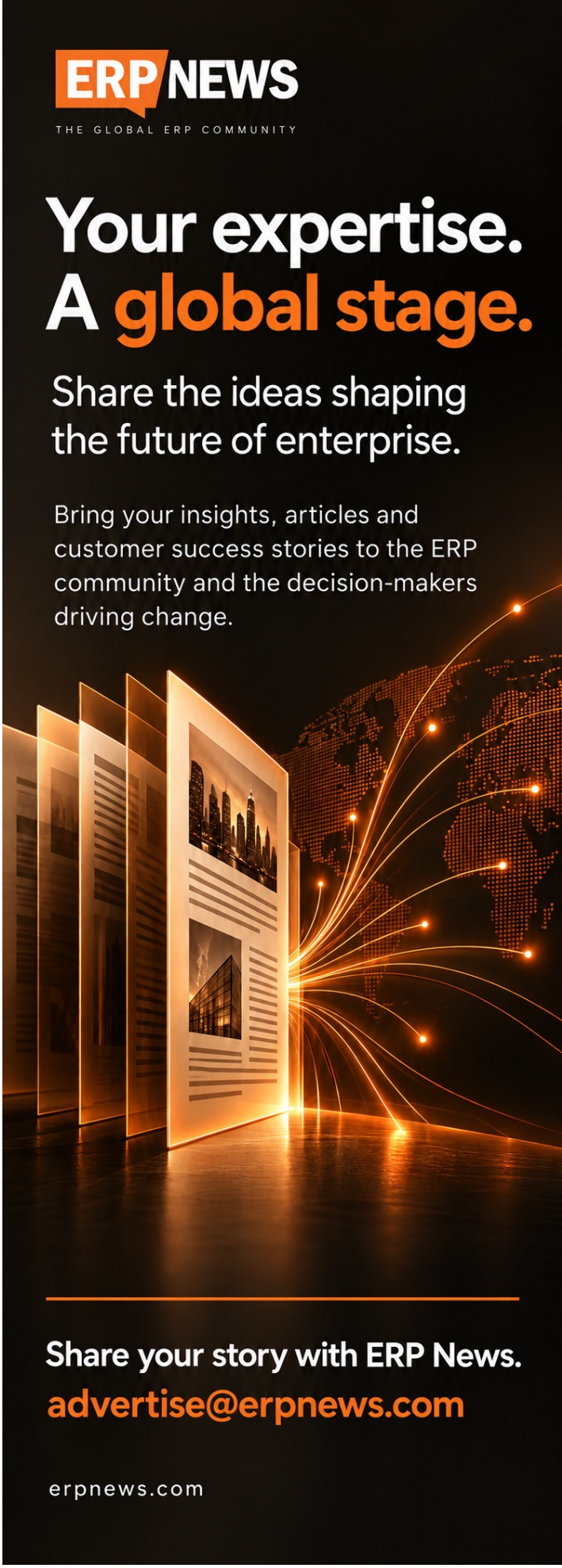
What does not change is the condition that makes any of it creditable: the improvement has to be traceable to the system that produced it. Savings a buyer, a sponsor or an analyst can verify are capitalized. Savings that rest on an assertion are adjusted away, and the difference between those outcomes is considerably larger than the difference between a good year and an average one.

To see what this analysis looks like against a specific set of company figures, the Equity Value Quiz generates the same bridge in about three minutes.

About the analysis

All figures in this series are illustrative estimates for a hypothetical company, derived from a single model applied across the three ownership structures. Benchmarks are drawn from published sources including NYU Stern/Damodaran January 2026 working-capital and margin data; CT Acquisitions and The Precision Firm 2026 manufacturing multiples; Rootstock and Forrester ERP benefit studies; and BLS employer cost data. They are not a valuation opinion, investment advice, or a prediction of any company's sale price or share-price performance.

Article By Ellen Rothschild | Rootstock Software



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PUTTING MANUFACTURING KNOWLEDGE TO WORK WITH AI

In this ERP News Executive Q&A, Eric Okimoto, Founder and CEO of Widge, explores how AI can preserve manufacturing expertise, connect technical documentation with ERP and CRM data, and expand workforce capacity while keeping people in control of consequential decisions.

Widge

KNOWLEDGE AT THE POINT OF WORK

As experienced employees retire, manufacturers face the challenge of preserving the expertise behind everyday decisions. Okimoto explains how AI can make product knowledge, technical documentation and operational information accessible to more employees, helping them answer complex questions without losing sight of the judgment and relationships that remain human.

GREATER CAPACITY, CLEAR ACCOUNTABILITY

Connecting knowledge across enterprise systems can shorten the path from a customer inquiry to an accurate answer or prepared order. The conversation examines the boundaries that make this useful in manufacturing: traceable sources, controlled access, human approval and measurable improvements in responsiveness, order processing and employee productivity.





ERIC OKIMOTO

Founder and CEO,
Widge

Eric Okimoto is the Founder and CEO of Widge, an AI platform for industrial manufacturers. He brings more than 20 years of enterprise software experience, with AI and machine learning as his focus since the mid-2010s.

His background includes senior product roles at SugarCRM and co-founding boodleAI, where he served as Head of Product.

A West Point graduate and former U.S. Army Infantry Officer, Eric holds an MBA from the University of Cambridge. His research on knowledge management and innovation continues to shape Widge's mission.

AI should be powerful but never unchecked. That's why we build in clear permissions, visibility, human oversight, and safeguards — so teams can benefit from AI while keeping their systems and data secure.

Q: Manufacturers have been talking about skilled labor shortages for years, but the challenge is increasingly becoming one of knowledge and capacity as experienced employees retire. From your perspective, how is this changing the role AI needs to play in the manufacturing workforce?

Eric Okimoto: The issue is no longer simply whether manufacturers can hire enough workers, it's whether they can preserve and scale the knowledge and performance of the workers they already have.

Manufacturing organizations have accumulated decades of expertise across engineering, production, sales, service, procurement and quality. Much of that knowledge resides with experienced employees who know where to find information, how different systems relate to one another, and how to interpret technical information in the context of a specific customer or operational problem.

We hear this from customers all the time: 65-year-old Bob is finally retiring and taking all of his product and customer knowledge with him. It isn't written down anywhere. It's in his head. Most companies approach this as "we need to hire Bob's younger replacement," or, if technology is the focus, "we need to implement SharePoint."

AI has the potential to capture and store that knowledge quickly and simply, without placing a huge burden on the organization. Done properly, AI can give your entire workforce the expertise and skills of Bob, amplifying the capacity of the existing workforce by making enterprise knowledge available to more people, more quickly.

That changes the objective from merely automating individual tasks to giving employees access to the accumulated knowledge of the organization at the moment they need it.

Q: A significant amount of manufacturing expertise still exists as "tribal knowledge" — held by experienced employees rather than captured in formal systems. Can AI realistically preserve and transfer that knowledge to the next generation, and where are the limits?

Eric Okimoto: Absolutely. A good AI system makes it easy to capture tribal knowledge and even learns from your employees, while also protecting your data. The challenge is choosing a vendor, or building something yourself, that doesn't simply train an LLM on your business and create new problems in the process. No one fully understands how big tech companies use inputs to train their models. Manufacturers have to treat their proprietary knowledge as something to be protected, not just uploaded.

There are also real limits to what AI can preserve. Judgment developed through decades of experience cannot simply be converted into a database overnight, and manufacturers should be skeptical of claims that AI can completely replace that expertise.

Bob's product knowledge can be captured: which part fits which application, what the workarounds are, what the notes in the margins of the catalog mean. What's much harder to capture is Bob's tacit knowledge of the customer. He knows which buyer needs a phone call instead of an email, which plant manager will accept a substitute part and which one won't, and when a "we're fine" on a call actually means there's a problem brewing. That kind of judgment is built over years of relationships, and no technology can truly understand or master it. AI can make sure the next generation starts with everything Bob knew about the products. The relationships, they still have to earn themselves.

A better goal is knowledge amplification. AI can make documented expertise easier to find, connect information that previously required an experienced employee to assemble manually, and help newer employees get up to speed faster from the accumulated knowledge of the organization. Human expertise remains essential, particularly when decisions involve ambiguity, safety, unusual operating conditions or consequences outside the system's established knowledge.

Q: ERP systems contain enormous amounts of operational intelligence, yet employees often still have to move between ERP, CRM, product documentation, spreadsheets and experienced colleagues to answer a single customer or technical question. Why has connecting these sources of knowledge remained so difficult?

Eric Okimoto: Manufacturing technology evolved around specialized functions rather than around a single enterprise information model.

ERP manages transactions and resources. CRM manages customer relationships. PLM and CAD manage product and engineering information. MES manages production. Other systems manage supply chain, quality and service. Each was designed to solve a particular problem, often at a different point in the company's history.

The result is not necessarily a shortage of information — it's fragmentation.

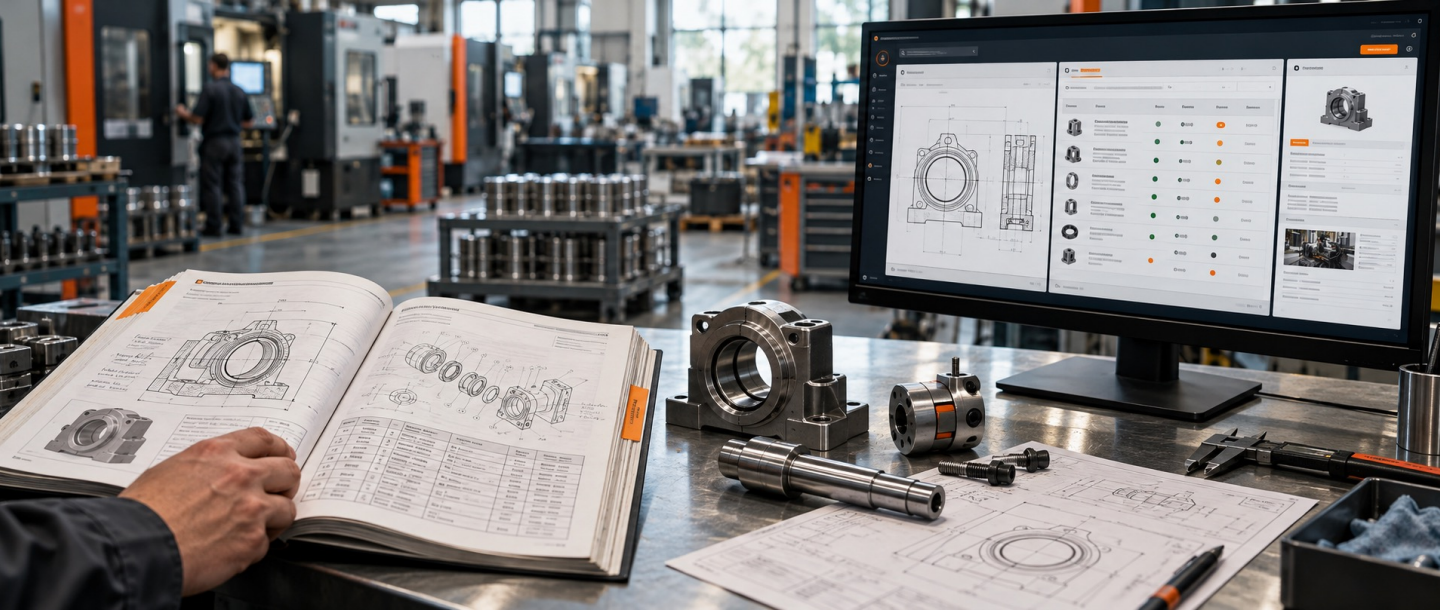
A seemingly simple question — whether a particular product configuration is compatible, available and appropriate for a customer — may require information from several systems plus a technical manual or specification sheet. An experienced employee effectively performs the integration manually by knowing which systems to consult and how to reconcile what they find.

Technically, it's possible to unify data, creating a common intelligence layer capable of retrieving and interpreting the relevant information across them. However, companies have been slow to embrace AI for this purpose. There is still a huge trust deficit, and for good reason. The headlines are all about an AI apocalypse, and it's hard for people to distinguish between narrow AI operating within guardrails and "the Terminator."

A good AI system (harness) should have well-managed agents in a box, secure data, and humans in the loop, with an easy-to-use interface that automatically prepares ERP and CRM data for human review, solves difficult customer questions, and brings the data to the user rather than making the user do the work.

"A better goal is knowledge amplification."

ERIC OKIMOTO



FROM TECHNICAL DOCUMENTS TO CONNECTED INTELLIGENCE

Q: Much of the conversation around enterprise AI assumes that company data is ready for AI to use. In manufacturing, however, critical information often sits inside PDFs, technical manuals, specification sheets, product catalogs and legacy documents. What makes this kind of unstructured technical information particularly challenging for general-purpose AI?

Eric Okimoto: General-purpose AI simply isn't built for manufacturing. It typically relies on generic OCR or standard PDF-to-text libraries that struggle with CAD diagrams, schematics, and complex tables. We use a purpose-built pipeline that draws on the best LLM for each task to process technical documentation. A good AI system shouldn't require a lot of setup work. It should be "bring your data as-is, and the system does the rest."

This is an area Widge has focused on specifically — creating a data abstraction layer capable of working with manufacturing information such as product documentation, PDFs and schematics, and connecting that information with operational systems.

Q: Widge describes an approach in which AI can retrieve information across documents, ERP and CRM systems simultaneously, rather than treating each as a separate source. What changes when AI becomes a layer across enterprise systems instead of another standalone application employees have to use?

Eric Okimoto: Think of it as a Claude- or ChatGPT-style experience for your employees and customers, but connected to your systems. We've heard of companies trying to build this themselves, and when you pull back the curtain, you usually find agent-management issues, much higher costs, security issues, and a significant drain on the organization's time. We're providing the "easy button" for mid-market manufacturers: they don't have to think about it, but they get that integrated experience at a reasonable cost. Our goal is for customers to log into their CRM or ERP only for administrative needs, with all day-to-day tasks handled in Widge.

The paradigm shift is that an employee no longer has to understand where the information lives in order to find that information and make use of it.

Today, experienced employees are forced to function as human integration layers. We've all heard of "swivel-chair integration."

If you're lucky, that employee knows which system to open, which document to locate, which spreadsheet contains additional information, and which colleague to call when something is missing, questionable, or doesn't reconcile.

When AI can operate across those systems, the interaction can start with solving the business question rather than determining the right application to access.

That is a significant change in enterprise computing. The systems of record remain important, but employees become less dependent on understanding the mechanics of every system and even entering in the necessary keystrokes in order to access the knowledge contained within them.

Q: There is an important difference between an AI assistant that answers a question and one that can take action — for example, checking inventory, initiating an order or passing a transaction back into an ERP system. As manufacturers move from AI assistance toward execution, where should the boundaries of autonomy be drawn?

Eric Okimoto: Good question, and one we've debated at length. Our philosophy is to always keep humans in the loop and never create direct surface area for agents to interact with a manufacturer's critical systems of record (Agents in a box). Our agents handle the busy work, but real people still review, approve, and process. This ultimately comes down to risk management. There is some opportunity for agents to fully and autonomously handle low-risk tasks (for example, sending an email response about an order status), but the industry is still working through the change-management side of this.

AI autonomy must be proportional to the consequences of those decisions.

There is a major difference between retrieving an inventory balance and committing inventory, between preparing an order and releasing it, or between identifying a potential compatibility issue and authorizing a technical substitution.

Low-risk, deterministic actions can increasingly be automated. Higher-consequence actions should incorporate defined business rules, permissions and human approval. The system should also maintain an auditable record of what information was accessed, what action was proposed or taken, and under whose authority with a monitoring system for flagging issues.

The important principle is that AI should not receive more authority simply because the technology is capable of taking an action. Authority should be intentionally granted based on the operational and financial consequences of that action.

Q: Accuracy carries a very different risk in manufacturing than it does in many general knowledge use cases. A plausible but incorrect answer about product compatibility or a technical specification can have real operational consequences. What does "trustworthy AI" need to look like in an industrial environment?

Eric Okimoto: Trustworthy AI must be accurate and precise. It must be tested. It must be auditable and continually reviewed. Agents must offer traceability in their recommendations and actions. Too many AI and ERP companies launching AI products are taking a "throw it out there and let the customer figure it out" approach. That is going to get a lot of manufacturers in trouble, and they need to be aware of the risks.

A trustworthy industrial AI system should be able to recognize when the available information is incomplete, conflicting or outside its knowledge boundaries. In those situations, the correct behavior is to escalate to a person — not generate the most plausible answer.

Traceability also matters. Organizations should increasingly expect AI systems to show where critical information came from so employees can verify specifications, compatibility information or other consequential answers when necessary.

The standard for industrial AI therefore needs to be different from the standard for a consumer chatbot. Reliability, bounded behavior, traceability and intelligent escalation are fundamental design requirements.

> ***"Our agents handle the busy work, but real people still review, approve, and process."***
>
> **ERIC OKIMOTO**



SECURE AI, MEASURABLE MANUFACTURING IMPACT

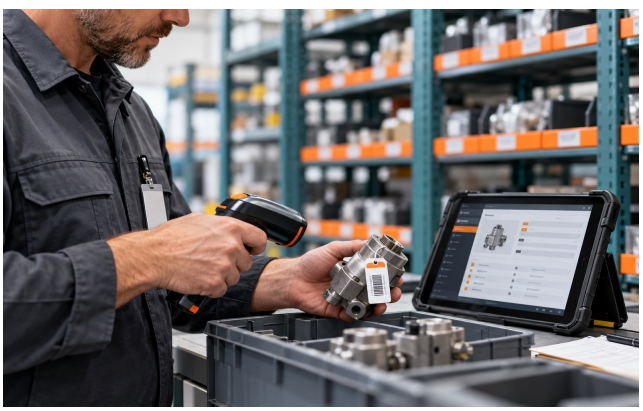
Q: Security is another concern when an AI layer can access ERP, CRM, technical documentation and potentially sensitive customer or product data. What governance and access controls should manufacturers insist on before allowing AI to work across these systems?

Eric Okimoto: When evaluating an AI company, it's important to distinguish between "AI wrappers" (essentially a front end on Copilot, Claude, or ChatGPT) and a real Agentic AI harness that protects your data and masks it from the large LLMs. Every AI company uses some sort of LLM. The good ones use multiple LLMs, including self-hosted open-source models, and route each query based on complexity, cost, security, and data sensitivity.

Agentic governance and access controls are paramount. As I mentioned, we don't give our agents direct access to systems of record; we provide them with tools and monitor their actions.

I heard a horror story from a large, well-known tech company in which agents working together on a task exchanged admin credentials to get it done, despite not having been granted that level of access. Needless to say, the outcome was a huge mess for that business. This new problem space will probably keep the big consulting firms in business for years.

At Widge, we isolate customer environments and don't use one customer's information to train another customer's AI. Enterprise deployments can also be configured on premises where data-governance requirements call for information to remain within the customer's own infrastructure.



"If you introduce AI and those numbers don't move, something is wrong."

Q: Many enterprise AI pilots demonstrate that the technology can answer questions, but that does not necessarily mean they create measurable business value. Which outcomes should manufacturing leaders track to determine whether an AI initiative is genuinely increasing workforce capacity rather than simply adding another technology layer?

Eric Okimoto: The outcomes manufacturing leaders need to track are the same ones they should be tracking today, with or without AI: customer responsiveness, customer satisfaction, and operational efficiency. What it should change is the impact, and those numbers are measurable. A few we watch closely with our customers:

- Time from a complex customer inquiry to accurate configuration and quote, including availability, lead time, and price
- Hours per week sales and customer service staff spend manually entering orders that arrive by email or PDF
- Percentage of customer and technical questions resolved on first contact, without escalating to an experienced colleague
- Ramp time for a new hire to handle questions independently
- Customer Satisfaction
- AR Balance and Collections
- EBITDA and Revenue Growth

Those metrics map directly to the pain we hear about most. Clients tell us their inside staff and their customers struggle to find the right part for the right application, and even when they do, they don't know whether it's available, what the lead time is, or what it costs. Sales teams tell us how much time order entry consumes. And nearly every customer has tribal knowledge locked in catalog notes and in the heads of a few experienced employees, with no plan for what happens when those people leave and support cycle times, first-response and first-resolution rates, error and rework rates, and the number of cases an employee can successfully handle.

If you introduce AI and those numbers don't move, something is wrong. It's either the wrong tool or the wrong implementation, and either way you've added a technology layer instead of capacity.

Q: Looking three to five years ahead, how do you expect the relationship between workers, AI and ERP systems to evolve on the manufacturing floor and across functions such as sales, service, procurement and supply chain? Will employees still primarily operate ERP applications themselves, or will AI increasingly become the interface through which work gets done?

Eric Okimoto: People aren't going away. They will simply get much more done because the busy work will be handled for them. No one buys anything that matters from an AI; people still value relationships.

ERP vendors are working on their own AI interfaces, but large tech companies are notorious for slow development – I've been there. The challenge for ERP companies is that their legacy systems constrain their evolution. AI-native solutions are built differently: rather than being "configured and customized," the AI handles that for the user. Agents no longer need complex business-process modeling; they can work from an SOP written in plain English. The game is changing. While it's hard to predict exactly what that means for ERP systems, I suspect it will involve a lot of industry change over the next three to five years.

The larger shift is from application-centric work to intent-centric work. Instead of employees learning how to navigate every system required to complete a task, they increasingly describe what they need to accomplish while AI coordinates information and workflows across the systems underneath.

For manufacturers facing both workforce constraints and the retirement of experienced employees, this is particularly significant. Competitive advantage will not come simply from having AI. It will come from how effectively a manufacturer can connect its operational data, technical knowledge and human expertise — and make all three usable at the point where work actually happens.

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EDITORIAL TAKEAWAY

Eric Okimoto's perspective places workforce capacity at the centre of manufacturing AI. The opportunity is to preserve accumulated expertise and make it available where employees need it, while reducing the routine work that consumes their time.

As experienced workers retire, capturing product knowledge becomes increasingly important. AI can help newer employees access documented expertise, but judgment, customer relationships and an understanding of unusual situations still require human experience.

Connecting technical manuals, catalogs and schematics with ERP and CRM information can make that knowledge more useful. Employees can begin with a business question rather than assembling an answer across disconnected applications.

Manufacturing also demands clear limits on execution. Preparing an order and releasing it carry different consequences. Permissions, human approval, traceable sources and escalation should reflect the risk of each decision.

Security and measurable outcomes belong in the same conversation. Protected knowledge creates a foundation for adoption; faster accurate quotes, less manual order entry and shorter onboarding times demonstrate whether AI is actually increasing capacity.

The emerging interface may change how employees interact with enterprise systems, but the strategic objective remains practical: connect operational data, technical knowledge and human expertise so people can serve customers and complete work more effectively.

MANUFACTURING AI CREATES VALUE WHEN CONNECTED KNOWLEDGE EXPANDS HUMAN CAPACITY UNDER CLEAR CONTROL.

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SOURCE-TO-PAY MEASURED BY REAL BUSINESS VALUE

Stewart Monk, Chief Revenue Officer, and Chris Rauch, Chief Operating Officer at Proactis, discuss why Source-to-Pay success depends on measurable outcomes, customer adoption and strong foundations for AI.

proactis

VALUE BEYOND GO-LIVE

Organisations want faster value with manageable disruption. Proactis's modular approach helps them address pressing challenges first and build from proven results. Monk and Rauch explain why clear success criteria, customer adoption and sustained engagement are essential to turning implementation into lasting operational improvement.

BUILD THE FOUNDATIONS FOR AI

AI can accelerate invoice processing and improve data extraction, but its effectiveness depends on the processes beneath it. The conversation explores why reliable data, consistent adoption and sound governance provide the foundation for more intelligent spend management and better business decisions.





CHRIS RAUCH
Chief Operating Officer, Proactis

STEWART MONK
Chief Revenue Officer, Proactis

Stewart Monk brings more than 30 years of experience building and scaling commercial organisations across ERP, HCM and enterprise technology. Drawing on roles at Oracle, Certinia and PowerSchool, he emphasises the importance of customer relationships, faster time to value and sustained engagement beyond implementation.

Chris Rauch's background spans Customer Success, Support and Professional Services. His perspective centres on connecting customer expectations with implementation plans, maintaining a personal service as operations scale and measuring success through adoption, process consistency and lasting business outcomes.

The organisations getting the most from Source-to-Pay are the ones that have built strong adoption, consistent processes and reliable data.

Q: You're both joining Proactis at a point when Source-to-Pay is moving beyond process digitisation toward more intelligent and increasingly automated spend management. From your respective perspectives, what do you see as the biggest change taking place in the market right now?

Stewart Monk: The conversation has fundamentally changed. A few years ago, we were talking to finance and procurement teams about whether to digitise. Today, the question is how far, how fast and how to make sure the foundations are solid enough to get real value from what comes next.

What I find genuinely exciting is that we're at the point where the technology has caught up with the ambition. AI in Source-to-Pay is no longer theoretical, it's live, it's measurable and it's already delivering results for customers like Betfred, who achieved a 47% AP efficiency improvement through our Invoice Capture AI Accelerator. That kind of proof point changes the conversation entirely.

The organisations that will pull ahead are the ones who treat the underlying process and data foundation as a strategic asset, not a precondition to tick off. That's where the real opportunity is and that's what drew me to Proactis.

Chris Rauch: From an operational standpoint, the shift I find most significant is the move from output-based measurement to outcome-based accountability. For years, the question was 'did the system go live'. The question now is 'is it actually changing how the business operates and delivering the outcomes customers expect'.

That requires a different kind of engagement from software providers, one that extends well beyond implementation and into how customers use the platform over time. The organisations getting the most from Source-to-Pay are the ones that have built strong adoption, consistent processes and reliable data. Those are the foundations that make everything else work.

Q: Proactis has built its position around modular Source-to-Pay. As organisations look for faster time to value and less disruption, are you seeing a shift away from large-scale transformation programmes toward more incremental, outcome-led modernisation?

Stewart Monk: Absolutely, and honestly, it's one of the things that makes Proactis a compelling proposition right now. The era of the multi-year, big-bang ERP transformation is not dead, but it's losing ground to a more pragmatic approach: start where the pain is greatest, prove the value, and build from there.

That plays directly to the way Proactis is built. Our modular architecture lets organisations address a specific challenge, invoice processing, supplier management, spend visibility, and deliver measurable results quickly without needing to overhaul everything at once. Time to value has become a genuine differentiator, and we have the case study portfolio to prove it.

Chris Rauch: The shift is real and it's driven by experience as much as preference. Many organisations have been through large-scale technology programmes that took longer, cost more and delivered less than expected. There is understandable caution as a result.

What we see working consistently is a focused starting point with clear success criteria, a defined process, a committed customer team to partner with, a baseline measurement and an agreed target. When that's in place, the case for the next phase practically makes itself. Modular implementation is not a compromise; done well, it's a more reliable path to value than trying to change everything at once.

Q: Stewart, you've spent more than 30 years building and scaling go-to-market organisations across ERP, HCM and other enterprise technology markets. What have those experiences taught you about what customers now expect from enterprise software providers beyond the technology itself?

Stewart Monk: The honest answer is that technology has become the price of entry. When I started in this industry, having a great product was genuinely differentiated. Today, there are excellent products across almost every category. What separates the best providers is everything around the technology.

Customers want a partner who understands their business problem before they understand the software. They want speed, not just in implementation, but in the time it takes to feel confident that the investment is working. And they want to feel like the relationship gets better over time, not just maintained.

The experiences that have shaped me most, from Oracle to Certinia to PowerSchool, consistently showed that customer retention and expansion are won or lost in the post-sale relationship. That's where trust is built, and trust is what drives everything else: renewals, referrals, upsell, advocacy. It's not complicated, but it requires deliberate, sustained effort.

Q: In a mature enterprise software market, what does sustainable growth look like today? How much of that opportunity comes from winning new customers versus creating greater value and deeper engagement within the existing customer base?

Stewart Monk: Sustainable growth in this market has to be dual-engine: you need both, and you need them working together. But I'd probably push back gently on the framing that they're separate opportunities.

Your existing customers are your best acquisition channel. A customer who has seen real value from a Proactis implementation and has a strong relationship with the team is also your most credible advocate to a prospect. The organisations that try to separate new logo activity from customer success tend to underperform on both.

That said, and I think it is important to be direct about this, the biggest lever for sustainable growth right now is ensuring every existing customer is getting the value they signed up for. If we do that well, the growth follows. Proactis has a strong, long-standing customer base and a product that keeps improving. That's a genuinely good position I will be building upon.





CONNECTING CUSTOMER EXPECTATIONS WITH REAL RESULTS

Q: Mid-market organisations often face enterprise-level procurement complexity but have fewer resources and less tolerance for lengthy transformation programmes. How should Source-to-Pay providers adapt their go-to-market approach to better serve that part of the market?

Stewart Monk: The mid-market is where I think the biggest opportunity in Source-to-Pay sits right now, and it's also where providers most often get the approach wrong.

The mistake is treating mid-market customers as smaller enterprise customers. They're not. They have different constraints, different decision-making structures and a much lower tolerance for complexity. They need a clear answer to three questions: what will this do for my organisation, how quickly, and what will it actually take from us to get there.

The go-to-market response has to match that. Shorter sales cycles, faster onboarding, more opinionated implementation guidance and commercial models that don't require a business case the size of a small dissertation. Proactis's modular approach is well suited to this, the challenge, and the opportunity, is making sure how we take it to market reflects that.

proactis

Q: Chris, your background spans Customer Success, Support and Professional Services. Where do you most often see a disconnect between what customers expect when they buy enterprise software and what they experience after implementation?

Chris Rauch: The most common disconnect is not about the software itself, it's about what success was defined to mean before the contract was signed. Sales processes are, by their nature, focused on possibility: what the platform can do, what other customers have achieved, what the future state looks like. Implementation reality requires specificity: this process, these users, this configuration, in this timeframe.

When that translation doesn't happen clearly, when the customer's vision of transformation hasn't been connected to a concrete implementation plan with measurable milestones, you see disappointment even from technically successful deployments. The software is working. But the customer doesn't feel the value they expected.

The fix requires alignment early: agreed success criteria before go-live, realistic timelines, prioritised business requirements and a shared understanding of what the customer's team needs to bring to make the implementation work. There is a saying that "customers buy on hope and renew on experience."

Q: As SaaS businesses scale, there can be tension between operational efficiency and maintaining a high level of customer service. How do you create more scalable operations without making the customer experience feel increasingly standardised or distant?

Chris Rauch: The main thing is making sure customers don't have to keep repeating themselves. Most customers are fine with process. What annoys them is speaking to someone who doesn't know their history, and that happens more as a business grows and work gets passed between teams.

The handover from sales to onboarding is a good example. A customer might spend weeks with the sales team explaining what they're trying to achieve and how their business works. Then on the first onboarding call they get asked the same questions again. That's a poor start, and it makes us look disorganised. If everything the customer told sales is properly written up and handed over, the onboarding team can start from what they already know, and the customer just feels like they're dealing with one company.

I'd apply that thinking more broadly too. Standardise the routine work so it's quick and consistent, make sure the team can see a customer's history before they speak to them, and give them enough freedom to make sensible exceptions without needing sign-off every time. Small things help as well. Our support agents sign their emails with their own name rather than a generic "Support", so customers know who they're dealing with.

I don't think scale and a personal service are opposites. Good processes are what let you stay personal as you grow, because the team spends less time chasing information and more time with the customer. That's something I'll be keeping a close eye on in this role.



Q: Procurement and finance leaders are increasingly expected to demonstrate measurable outcomes from technology investments. Beyond cost savings and process efficiency, which measures do you think provide the clearest indication that a Source-to-Pay transformation is actually working?

Chris Rauch: Cost savings and process efficiency are necessary measures, but they are lagging indicators, they tell you what happened, not whether the change will last. The measures that give me the clearest signal are adoption and adherence metrics.

If the people who are supposed to be using the system are using it, consistently, in the way it was designed, that tells me the process has actually changed, not just the technology. Conversely, a system with strong automation metrics and low adoption is a system waiting to regress.

Beyond adoption, I look at supplier engagement rates, first-time invoice match rates, purchase order compliance and the ratio of exceptions to total transactions. These are operational measures, but they are also leading indicators of data quality, and data quality is what determines how much further value the organisation can unlock, including from AI. The organisations that focus only on cost savings often find they have to rebuild the foundation later. The ones that measure adoption and compliance from the start tend to compound their results over time.

“Good processes are what let you stay personal as you grow, because the team spends less time chasing information and more time with the customer.”

STRONG FOUNDATIONS FOR MEANINGFUL AI

> **"AI amplifies what's already there. If what's already there is fragmented, it will amplify that too."**
>
> **STEWART MONK**

Q: AI is becoming increasingly prominent across procurement and finance. Where do you believe it can create meaningful value in Source-to-Pay today, and where should organisations be cautious about introducing AI before their data, processes or governance are ready?

Stewart Monk: The short answer on where AI can create value today is: anywhere the data is structured, the process is understood and the performance baseline is clear. For many organisations, accounts payable is the right place to start with AI, because the data is relatively well structured and the performance gains are measurable from day one.

For example, our Invoice Capture with AI Accelerator uses machine learning to improve the accuracy and speed of invoice data extraction. The result is faster processing, fewer exceptions, less manual intervention and a cleaner data foundation for everything that follows.

The caution I would offer is this: AI is not a shortcut past the hard work of getting your Source-to-Pay foundation right. The organisations that see the best results are not the ones who moved fastest, they are the ones who got their processes, adoption and data into good shape first. AI amplifies what's already there. If what's already there is fragmented, it will amplify that too.

Chris Rauch: From an operational perspective, the clearest signal that an organisation is ready to benefit from AI is the quality of the data that already flows through its Source-to-Pay processes. Clean, consistent, complete data, with high adoption and low exception rates, gives AI the best possible foundation to work from.

Where I would urge caution is in applying AI to processes that are not yet well understood or well managed. AI needs to be trained on something accurate and representative. If the underlying process is inconsistent, if people are routinely working around it, or if the data has significant gaps, you will not get reliable outputs. In those situations, the priority should be fixing the process first. AI then becomes a meaningful accelerator rather than a mask for underlying problems.



Q: Looking three to five years ahead, how do you expect Source-to-Pay to evolve? Will it remain a distinct category of procurement technology, or become more deeply embedded as an intelligent layer connecting ERP, suppliers, financial data and enterprise decision-making?

Stewart Monk: I think both things are true, and the tension between them is what makes this such an interesting moment to be in this market. Source-to-Pay as a distinct operational discipline will remain. The underlying challenges of supplier management, contract compliance, spend control and invoice automation do not disappear because ERP vendors add AI features to their roadmaps.

But the most valuable Source-to-Pay platforms will increasingly feel less like standalone applications and more like intelligent connective tissue between the ERP, the supplier network and the financial decision-making layer of the business. The data generated across the Source-to-Pay lifecycle, when it is clean, connected and accessible, becomes genuinely strategic. That is the direction of travel, and it is one that Proactis is well placed to be part of.

Chris Rauch: My perspective is that the distinction between Source-to-Pay as a category and ERP as a system will become less meaningful to end users, even as it remains meaningful to the market. What finance and procurement leaders will care about is whether the right information reaches the right person at the right time to support a better decision. Whether that comes from a dedicated Source-to-Pay platform, an ERP extension or an AI agent is increasingly secondary.

What that means operationally is that integration, data quality and adoption become even more critical over the next three to five years than they are today. Organisations that build strong Source-to-Pay foundations now will be in a significantly better position to benefit from whatever the intelligence layer looks like in 2029. Those that defer the foundational work in the hope that a future AI deployment will do it for them are, I suspect, going to find that assumption expensive.



ERPNEWS

EDITORIAL TAKEAWAY

The conversation with Stewart Monk and Chris Rauch places lasting business value at the centre of Source-to-Pay modernisation. A successful deployment begins the journey; sustained improvements in how people work demonstrate its value.

Modular implementation offers a practical starting point, particularly for mid-market organisations. Addressing a pressing challenge, agreeing clear success criteria and measuring progress can establish the confidence needed for the next phase.

Customer relationships are equally important. Clear handovers, shared expectations and accessible customer history help providers maintain a personal service as operations scale, while keeping delivery connected to the outcomes originally promised.

Adoption and process adherence reveal whether transformation is taking hold. Supplier engagement, invoice matching and purchase order compliance provide further evidence that improvements can endure beyond the initial implementation.

AI adds another opportunity, but its effectiveness depends on these foundations. Reliable data and consistent processes allow automation to accelerate performance; unresolved fragmentation limits the quality of its results.

As Source-to-Pay becomes more closely connected with ERP, suppliers and financial decision-making, those foundations gain strategic importance. Organisations that strengthen them today will be better positioned to turn emerging capabilities into sustained operational value.

LASTING SOURCE-TO-PAY VALUE STARTS WITH STRONG PROCESSES, RELIABLE DATA AND CUSTOMER ADOPTION.

ERPNEWS

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01
THE CHALLENGE
The business need that started it.

02
THE JOURNEY
The people and decisions behind change.

03
THE IMPACT
The results that made a difference.

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SAP'S NEXT HR CHAPTER: UNDERSTANDING WORK, CONNECTING TALENT

SAP is advancing Autonomous HCM with AI assistants and workforce intelligence designed to connect people decisions with business priorities.

As AI changes how work gets done, HR leaders face decisions that extend beyond process efficiency. They need to understand which tasks are changing, which skills remain essential and how employees can move into new responsibilities.

SAP's Autonomous HCM strategy addresses this through three connected priorities: automating HR administration, redesigning work across people and AI, and adapting how organizations recruit, develop and reward talent.

The broader opportunity is to use the capacity released by automation effectively. Less time spent on routine administration could give HR teams more room to assess workforce needs and support organizational change.

SAP's latest announcements bring this direction into focus, combining practical SuccessFactors updates with a planned acquisition aimed at giving leaders a more detailed understanding of work.

BUILDING A CLEARER PICTURE OF WORK

SAP has entered into an agreement to acquire TechWolf, whose AI platform connects information about tasks, employee skills and the external labor market. Drawing on existing HR and business systems, its context graph maps this information against an organization's business strategy.

Following completion, SAP expects TechWolf to support skills mapping, workforce planning and organizational redesign across SuccessFactors. The acquisition is expected to close in the fourth quarter of 2026, subject to customary conditions and regulatory approval. SAP's current plans include maintaining platform availability for both SAP and non-SAP customers.

For workforce planning, the potential value lies in making existing capabilities more visible. Understanding the tasks involved in a role could help leaders assess whether changing requirements call for recruitment, employee development or internal movement.

AI SUPPORT FOR EVERYDAY HR

SAP's October updates include assistants for payroll, HR services, learning, recruiting, onboarding and career development. A forthcoming Workforce Planning Assistant will combine SuccessFactors, SAP Fieldglass and SAP Cloud ERP data to support decisions about hiring, reskilling, redeployment and external talent.

Employee Central is also receiving a U.S. benefits administration console for monitoring enrollment and exceptions, alongside a tool that recommends coverage based on employee needs and budgets.

An integration between WalkMe Learning Arc and SuccessFactors Learning allows authors to describe requirements in natural language and generate courses and quizzes while retaining control of the content.

CONNECTING INSIGHT WITH ACTION

These HCM developments form part of SAP's wider Autonomous Enterprise strategy. Joule Work is beginning its customer rollout, providing a natural-language interface for interacting with business systems.

Joule Assistants can execute operational activities within established workflows, using existing authorizations and audit trails. Customers control the degree of autonomy. SAP Business AI Platform supplies the environment for building and governing AI across SAP and third-party systems, supported by business context from SAP Business Data Cloud and SAP Knowledge Graph.

Viewed together, the announcements suggest a closer relationship between workforce intelligence and day-to-day execution. The practical test for HR leaders will be whether better information leads to more effective staffing, development and deployment decisions.





LESS SEARCHING, MORE MAKING: INFOR RETHINKS THE ERP EXPERIENCE

Infor CloudSuite Industrial brings role-based workspaces, clearer screens and embedded AI together to help manufacturing teams move from information to action.

A production delay rarely arrives as an isolated problem. It can involve materials, capacity, engineering changes and quality checks. For the people responsible, the challenge is finding the relevant information and deciding what to do next.

Infor's April 2026 CloudSuite Industrial release addresses that interaction through workspaces organized around manufacturing roles, modernized forms and AI assistance embedded within everyday workflows.

The design direction makes the user experience part of the operational conversation. A useful ERP screen should help someone recognize a priority, understand its context and reach the appropriate action.

For manufacturers evaluating enterprise software, that creates a practical question: how easily can employees use the system's capabilities during a busy working day? The answer matters alongside the breadth of functionality available.

A WORKSPACE BUILT AROUND THE ROLE

CloudSuite Industrial's workspaces give engineering, production and quality managers, buyers and executives views aligned with their responsibilities. They bring together relevant KPIs, alerts and prioritized worklists, with drilldowns into transaction details.

Hub views apply a similar approach to individual tasks, placing operational information and next actions together. Modernized forms introduce clearer visual hierarchy, consistent controls and improved search and filtering while preserving underlying workflow logic.

For a production supervisor, the practical value of such a layout is the relationship between the signal and the response. A shortage becomes easier to investigate when the relevant records are close at hand. A quality exception becomes more useful when the user can identify the next step.

These are illustrative operational scenarios, but they explain why interface design deserves attention in ERP evaluation. Information visibility and ease of action shape how people experience a system.

INTELLIGENCE WITHIN THE TASK

The embedded GenAI Assistant uses live ERP information and the existing security model to summarize work orders and highlight exceptions. Users can request assistance within the task they are already performing.

From an operational perspective, keeping that interaction within the workflow could reduce the effort involved in gathering context. Its usefulness will depend on whether the response helps the employee understand the issue and take an appropriate next step.

FROM PROCESS DIAGNOSIS TO IMPROVEMENT

Infor Velocity Suite extends the approach beyond individual screens. It combines process mining, prebuilt Value+ solutions and generative AI within the Infor Industry Cloud Platform.

Its documented improvement model follows three stages. Process mining diagnoses inefficiencies and gaps in existing processes. Value+ solutions automate selected activities to reduce manual effort. GenAI supports optimization through data-driven insights.

The prebuilt catalog provides a route for deploying industry-specific automation use cases, connecting process analysis with practical implementation.

This adds another dimension to the user-experience discussion. Improving a screen can make a task easier; examining the process behind it can reveal why the task requires so much effort in the first place.

MAKING CAPABILITY EASIER TO USE

Infor positions CloudSuite Industrial for small and midsize manufacturers, with capabilities spanning product lifecycle support, project-based manufacturing, multi-site coordination and advanced planning and scheduling.

The editorial significance of the interface updates lies in making that operational scope more accessible. Manufacturers can assess the result through everyday questions: can employees identify urgent work quickly, investigate exceptions efficiently and complete actions with fewer navigation steps?

Those measures offer a concrete way to judge whether a more modern ERP experience is improving the working day.



IBM AND SAP CONNECT CLOUD ERP MODERNIZATION WITH AI READINESS

IBM Ready for SAP Solutions supports midsize and fast-growing companies seeking connected operations and a foundation for future AI initiatives.

Announced on October 7, the offering combines IBM's sector knowledge, fit-to-standard implementation and its AI-powered IBM Consulting Advantage platform.

Volumetric Building Companies completed a three-month SAP Cloud ERP transformation with IBM. The modular construction business reported a 50% reduction in operational cycle times across purchasing, manufacturing and inventory, alongside improved visibility across its supply chain and operations.

Second Nature Brands used its transformation to bring the acquired Voortman Bakery business onto a shared enterprise platform, supporting more coordinated operations and further growth.

The projects illustrate two routes to modernization: streamlining existing processes and connecting acquired businesses. Both establish infrastructure intended to support subsequent automation and AI projects.

IBM research also found that 68% of enterprises consider faster ERP modernization important for efficiency and competitiveness. SAP said the collaboration extends its GROW Fast methodology, supporting SAP Cloud ERP deployments that can go live within weeks.

IBM Ready for SAP Solutions currently serves selected countries and industries. IBM intends to broaden its geographic and sector coverage.

BUILDING THE ENTERPRISE FOUNDATION FOR AI

IBM, SAP and their customers explain how connected business processes and a modern digital core can support the next stage of growth.

For Volumetric Building Companies, modernization addressed the need for technology that could grow alongside the business. COO Chris Macies said the connected ERP environment helps teams work faster and make better-informed decisions, while providing a scalable basis for future automation and AI.

At Second Nature Brands, acquisition integration was central to the transformation. Jeff O'Gradney, VP IT, emphasized the importance of expanding a unified enterprise foundation that would help the combined organization grow more efficiently.

Dr. Tom Janoshalmi, Global Managing Partner at IBM Consulting, linked these projects to the broader requirements for scaling AI. Despite their different starting points, both businesses now operate on modern SAP platforms designed to support their next steps.

SAP's Santina Franchi highlighted the combination of meaningful business data, connected processes, industry knowledge and effective governance as essential to realizing AI's enterprise-wide potential. She positioned the collaboration as a way to accelerate cloud ERP adoption and create a foundation for expansion across the SAP Autonomous Enterprise.

Together, the customer examples show how ERP modernization can serve a broader business agenda. Improving day-to-day execution and integrating acquisitions also create opportunities to connect enterprise data more closely with business processes. IBM and SAP position this foundation as an important step toward supporting further growth and future AI initiatives.





FAIRLINE YACHTS CHOOSES SYSPRO
TO CONNECT OPERATIONS AND INDUSTRIAL AI

The British yacht builder is placing cloud ERP at the heart of its modernization programme, linking operational processes with manufacturing-focused artificial intelligence.

Fairline Yachts has selected Syspro ERP and the Syspro Torque industrial AI platform as part of a wider upgrade to its IT infrastructure. The announcement was made on October 8, 2026.

The cloud ERP deployment will bring design, procurement, production, warehousing and aftersales together, supporting the company's plans for continued growth.

Engineering changes, bills of materials, material requirements planning, shop-floor activities and quality management will share a common data foundation. Design revisions are intended to feed directly into purchasing and scheduling, while recorded quality checks will support traceability.

Adrian Smith, Fairline's Head of Strategy, Performance and Innovation, said the company wanted comprehensive functionality within one system. He highlighted Torque's potential to simplify reporting and data analysis, helping teams make informed decisions.

Syspro Premium Solutions Partner HIT Technology will lead the implementation alongside Fairline's team. The project forms part of the yacht manufacturer's broader effort to improve processes and strengthen its operational foundation.

syspro

INDUSTRIAL AI WITH VISIBILITY AND OPERATOR CONTROL

Syspro Torque adds a manufacturing-focused AI layer designed to help operational teams investigate problems, assess recommendations and govern the actions taken across connected systems.

Launched in September 2026, Torque is designed to identify operational issues, suggest responses and execute approved actions within manufacturers' existing technology environments.

According to Syspro, the platform draws on a manufacturing knowledge graph built from decades of industry expertise. It combines that context with information about orders, inventory, suppliers and production schedules to support operational decisions.

Transparency is central to the approach. Recommendations and actions carry a record of the reasoning, business rules and data behind them, enabling operators and auditors to examine how a decision was reached.
Manufacturers can choose the level of authority assigned to agents, from requiring individual approvals to delegating established, repeatable workflows. Operations teams can also describe agent requirements in everyday language, without manually writing code.

Torque supports connections to ERP, manufacturing execution, warehouse and supervisory control systems. Syspro says the platform works with different ERP products, with its deepest manufacturing context available through Syspro ERP.

For Fairline, the selected platform is intended to make business information easier to access.





BASWARE EXTENDS INVOICE PROTECTION TO PAYMENTS WITH TRUSTPAIR ACQUISITION

The combination connects invoice lifecycle management with supplier and bank account verification, while Trustpair retains its independent platform and open ecosystem strategy.

Basware completed its acquisition of Trustpair on October 5, 2026, following the agreement announced in August. The transaction adds specialist payment fraud prevention to Basware's Invoice Lifecycle Management capabilities.

The rationale centers on a gap in financial controls: a genuine, correctly approved invoice can still result in a fraudulent payment if the supplier's bank details have been compromised.

Basware helps finance teams establish whether an invoice is valid, accurate, compliant and authorized. Trustpair complements those checks by verifying the supplier, the ownership of its bank account and the destination of the payment.

Trustpair will continue operating independently, preserving its platform, customer relationships, contracts and support. Customers can continue using it within their existing finance environments, including those that do not use Basware.

Longer term, the companies plan to explore combining Basware's data context, spanning 2.5 billion invoices and 20 million suppliers, with Trustpair's fraud intelligence to improve risk identification and automated validation.





PROTECTING THE FULL SUPPLIER JOURNEY

For Baptiste Collot, Co-founder and CEO of Trustpair, the combination creates an opportunity to connect payment fraud prevention more closely with the processes that precede it. In the August announcement, he emphasized that protection must extend from supplier onboarding and invoice approval through to the destination of the funds.

Collot also highlighted continuity for customers and partners. Trustpair would retain its team, platform and specialist focus, while Basware's resources and international reach would help accelerate its development. Following completion, he reaffirmed the company's commitment to an independent, system-agnostic approach.

That approach reflects how fraud can enter at different points in a supplier relationship. A new supplier record may contain false information, an established account may be changed, or payment instructions may be manipulated shortly before funds are released. Verification therefore needs to remain active as information evolves.

Trustpair's capabilities include independent supplier and bank account checks, ongoing monitoring of supplier records and validation before payment. Connections with ERP, procurement and treasury platforms allow these controls to operate within existing finance environments.

As AI makes impersonation more convincing and scalable, Collot sees fraud prevention becoming an active layer throughout the transaction lifecycle. The combination is intended to support that direction while preserving the flexibility customers need across different systems and finance platforms.



EXTENDING ASSURANCE BEYOND THE INVOICE

Basware CEO Jason Kurtz framed the acquisition around the financial outcome of a transaction. An invoice can pass the required checks and receive the appropriate approvals, yet the business can still lose money if the payment reaches an account controlled by a fraudster.

In the original announcement, Kurtz described the combination as an extension of Basware's decades of work protecting invoices. Trustpair adds specialist capabilities focused on the receiving account, connecting confidence in the underlying obligation with confidence in where the money will go.

The distinction is increasingly relevant as criminals use AI to produce convincing communications and impersonate trusted business contacts. A compromised supplier record or fraudulent request to change bank details can create exposure even when the invoice itself appears legitimate.

The acquisition also builds on Basware's earlier purchases of Glantus, AP Matching and Redmap. Trustpair complements the invoice fraud and duplicate-detection capabilities already incorporated into Basware's platform, expanding the scope of its financial controls.

IDC Research Director Kevin Permenter described the proposed combination as a timely strategic fit in the August announcement. He highlighted the potential for complementary datasets to enable more contextual and proactive risk assurance.

For finance teams, the broader objective is a connected control framework: understanding the obligation, validating the recipient and retaining evidence of the checks performed before payment.



Industry image: frontline manufacturing. Source: Acadia.

GLOBAL BEVERAGE MANUFACTURER / EPICOR

BUILDING SKILLS. RAISING PRODUCTIVITY.

An unnamed beverage producer used Acadia to make frontline knowledge more accessible, broaden employee skills and strengthen execution as experienced workers retired.

THE BUSINESS CHALLENGE

Retirements were putting pressure on a manufacturer running multiple beverage brands. Keeping production effective called for more flexibility across its packaging workforce. The task was to spread practical knowledge and help employees qualify for a wider range of work.

THE BUSINESS QUESTION

How can production remain resilient as experienced employees retire?

AT A GLANCE

SECTOR
Beverage manufacturing

FOOTPRINT
Global business

PLATFORM
Epicor Acadia

FOCUS
Skills and frontline execution

Customer identity is not disclosed in the published account.

WHAT CHANGED.
WHAT IT DELIVERED.

IMPACT AT A GLANCE

+17%

Year-over-year productivity

Broader skills

More flexible workforce coverage

Greater autonomy

Guidance at the point of work

Source: Epicor / Acadia published case study. Productivity figure reported year over year.

THE APPROACH

The manufacturer simplified processes, introduced digital standard operating procedures and cross-trained operators. Skills tracking helped teams identify who could cover different tasks when colleagues were unavailable. Guidance was available during the work itself, linking training to execution.

THE OUTCOME

Epicor reports a 17% year-over-year productivity improvement. The account also describes quicker proficiency, stronger process consistency and greater employee autonomy, with better visibility into employee qualifications and career paths.

IN PRACTICE

Simplify work | **Cross-train** | **Track skills**

BEFORE
Individual know-how

AFTER
Shared skills visibility



Industry image: factory teamwork. Source: Epicor.

CUSTOMER VOICE

“Every year since deploying Acadia, we’ve improved our total productivity…”

Director of Global Technology
Unnamed beverage manufacturer

ERP NEWS TAKEAWAY

Treat skills coverage as an operational capability. When knowledge can be accessed and applied by more people, the organization has more options for keeping work moving. This is an ERP News interpretation of the case.



Compressor products. Source: Aptean case study.

TECUMSEH / APTEAN

A MORE CONNECTED WAY TO MANAGE FREIGHT.

Tecumseh's Mississippi operation brought freight audit, carrier information and reporting into a more coordinated transport-management process.

THE BUSINESS CHALLENGE

A basic TMS left the refrigeration-equipment manufacturer with invoice discrepancies and limited visibility. Its logistics team needed clearer information and less manual reconciliation.

THE BUSINESS QUESTION

Can logistics teams spend more time improving decisions and less time resolving discrepancies?

AT A GLANCE

SECTOR
Refrigeration equipment

DEPLOYMENT
Mississippi, USA

PLATFORM
Aptean TMS

FOCUS
Freight audit and visibility

The case describes one facility within a global business.

WHAT CHANGED.
WHAT IT DELIVERED.

IMPACT AT A GLANCE

Managed audit
Less manual invoice work

Clearer rates
Better negotiating visibility

Better reporting
More accessible logistics data

Source: Aptean published case study. Qualitative operational gains; no quantified savings stated.

THE APPROACH

Tecumseh implemented Aptean TMS at its Mississippi facility. The case pairs managed freight audit with better reporting, giving the team a clearer basis for reviewing charges and carrier rates.

THE OUTCOME

The account reports less manual work and negotiated rate decreases. With the Mississippi implementation in place, Tecumseh was considering broader rollout and additional freight modes.

IN PRACTICE

Audit charges | **Review rates** | **Negotiate**

BEFORE
Manual reconciliation

AFTER
Managed freight audit



Refrigeration equipment. Source: Aptean case study.

CUSTOMER VOICE

"I wanted an all-inclusive, one-stop-shop."

Brett Wallace
Logistics Manager
Tecumseh

ERP NEWS TAKEAWAY

Evaluate the whole freight workflow. Better rate visibility matters most when someone can act on it and resolve exceptions. For buyers, the useful questions concern ownership, reporting and operational follow-through, alongside the software features.



Industry image: personal protective equipment in use. Source: Acumatica.

WAYNE SAFETY / ACUMATICA

FROM WAREHOUSE GUESSWORK TO OPERATIONAL CONTROL.

The Canadian safety-products distributor paired a new ERP with cleaner data and clearer processes, bringing structure to warehouse operations and greater confidence to financial reporting.

THE BUSINESS CHALLENGE

Wayne Safety's aging Masterworks system offered little warehouse integration. Finding stock depended on employee memory, while inconsistent pricing and weak credit controls undermined confidence in margins. Director of Operations Jelica Greenwood needed better information and enforceable operating procedures.

THE BUSINESS QUESTION

Can warehouse discipline and financial control improve together?

AT A GLANCE

SECTOR
Safety supplies and PPE

LOCATION
Toronto, Canada

PLATFORM
Acumatica Distribution Edition

PARTNER
CONTAX Inc.

Scope: warehouse, inventory, orders and financial control.

WHAT CHANGED.
WHAT IT DELIVERED.

IMPACT AT A GLANCE

35%+	-15%	5+ days
Order management improvement	Inventory errors	Faster financial close

Source: Acumatica published case study. Results relate to distinct operational measures.

THE APPROACH

Working with CONTAX, Wayne Safety cleaned its data, mapped processes and developed departmental super trainers before deploying Acumatica Distribution Edition. The project linked financials, inventory, orders and warehouse management. The published case says go-live was one month ahead of the original schedule.

IN PRACTICE

Clean data | **Map processes** | **Train teams**

THE OUTCOME

Defined bins, scanning and picking procedures replaced informal storage practices. Financial controls made credit holds and pricing approvals part of the workflow. The case reports improved order management, fewer inventory errors and a faster close.

BEFORE
Tribal stock knowledge

AFTER
Defined bins and procedures



Industry image: protective equipment. Source: Acumatica.

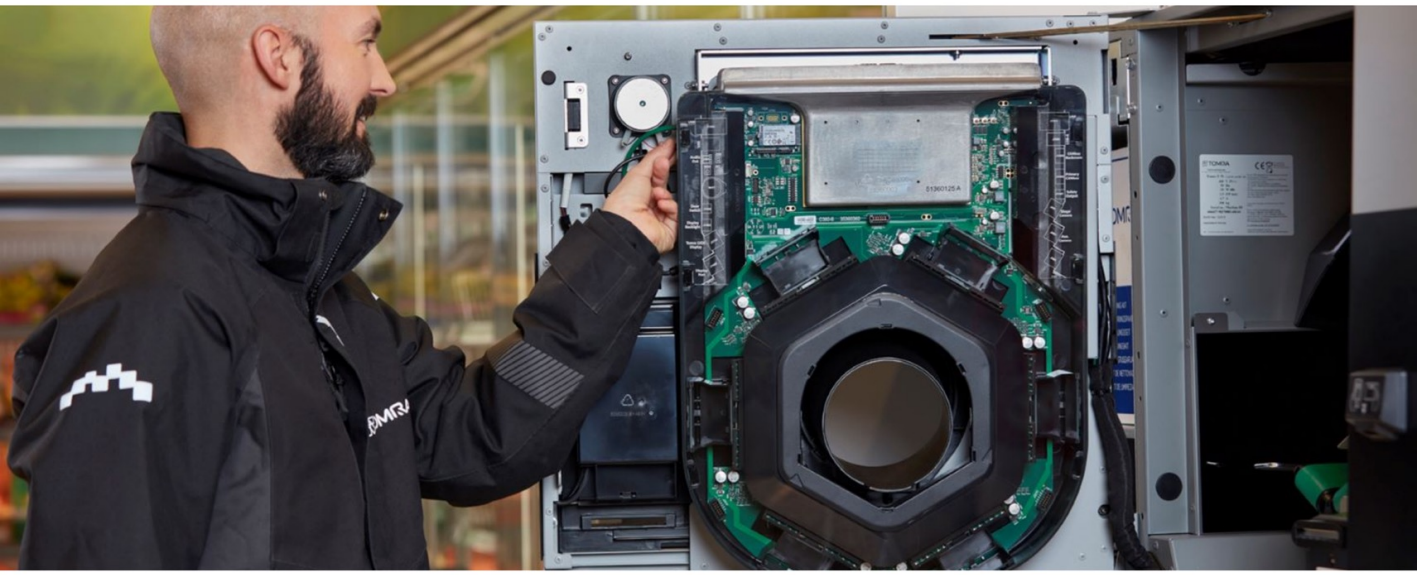
CUSTOMER VOICE

"Now we have lanes, we have bins, and we have procedures that we follow."

Jelica Greenwood
Director of Operations
Wayne Safety

ERP NEWS TAKEAWAY

A shared system becomes more valuable when the business agrees how work should happen. This case connects data preparation, staff training and enforceable controls. Those choices deserve as much attention as the product selection.



Service technician with a TOMRA T70. Image: TOMRA.

TOMRA NORTH AMERICA / IFS

MAKING EVERY SERVICE VISIT COUNT.

TOMRA's service transformation links shared processes and performance measures with a common platform, while its move to IFS Cloud supports continuing improvement.

THE BUSINESS CHALLENGE

Growth had left TOMRA with different systems, practices and performance measures across regions. Supporting equipment consistently called for a shared service model and a clearer view of where operational gaps were appearing.

THE BUSINESS QUESTION

How can a growing service organization define and improve consistent performance?

AT A GLANCE

SECTOR
Recycling technology

SCOPE
North American field service

PLATFORM
IFS Cloud

PARTNER
Infosys

North American field service within a global service program.

WHAT CHANGED.
WHAT IT DELIVERED.

IMPACT AT A GLANCE

96-97%
First-time fix rate; from 84%

+27%
Operational efficiency

Evergreen
Incremental cloud evolution

Source: IFS published case study. Efficiency gain reported since the initial IFS investment.

THE APPROACH

The service program standardized processes and KPIs, using IFS for ERP, field service and planning. TOMRA moved to IFS Cloud in 2023, working with Infosys and favoring configuration over custom code. The aim was an operating model that could keep evolving.

IN PRACTICE

Standardize | **Measure** | **Optimize**

THE OUTCOME

IFS reports first-time fix rates of 96-97%, compared with 84% previously, and a 27% efficiency gain since the initial IFS investment. These are program outcomes; the sources do not isolate the impact of AI or the cloud upgrade alone.

NEXT: AI-ASSISTED KNOWLEDGE (EXPECTED)

A reduction of up to 50% in technician onboarding is an expectation for Copilot rollout, not an achieved result in the published account.

BEFORE
Regional service practices

AFTER
Common service processes



Service technician with a TOMRA R1. Image: TOMRA.

CUSTOMER VOICE

“The visibility was a game changer.”

Daniel Basile
VP of Field Service
TOMRA North America

ERP NEWS TAKEAWAY

Agree what good service looks like before optimizing it. Shared definitions make performance visible; consistent processes make improvement repeatable. Keep new AI expectations separate from measured results so readers can judge both clearly.

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