From Friction to Flow:

Moving Beyond Spreadsheets to Agentic Supply Chain Execution

SUPPLYCHAINDIVE

Custom content for Salesforce from Studio by Informa TechTarget

If you're a regional retailer, this scenario likely sounds familiar:

You process thousands of orders every day. The inventory appears available, but an order routes to the wrong distribution center. A logistics planner checks it against a spreadsheet. The warehouse manager sends an email. A third-party logistics provider confirms it by phone. Every system works as planned, yet the process stalls.

Meanwhile, a customer is checking their order status. A service representative can see the order in the system, but not why it has been delayed. To get an answer, they reach out to operations and wait. What should be a simple question becomes a multi-step process.

This is the reality inside many modern supply chains. Organizations are heavily invested in systems designed to improve visibility. They can see orders, inventory, and supplier activity in real time. Yet the real challenge is capturing insights and using them to trigger corrective actions immediately – across both operations and customer-facing teams.

When those issues arise, employees must stop what they're doing and step in to keep things moving forward.

Efficiency is a casualty of a disconnected process. The root cause, in many cases, is unstructured data and a lack of cross-entity coordination. Friction does not happen within systems, but in the gray area between the systems and the people who rely on them.

"That's where we see this introduction of manual work, manual workflows, always coming to a pinpoint or bottleneck. The reason they persist is that much of this work ends up being done between emails, spreadsheets, different users, different systems. Without any type of cross-connective tissue, that's really where the failure mode exists."

Kevin Arbeiter, Director of Agentic Industry and Supply Chain Strategy at Salesforce

Still, supply chains are expanding. With more systems, partners, and locations, the gaps become more difficult to manage. Emails and spreadsheets strain under scale.

Removing friction and finding flow does not call for abandoning your legacy tech. Rather, it requires a shift in how the work is structured and executed.

In today's most efficient supply chain operations, time-consuming manual work is instead completed by automated processes and, increasingly, by specialized AI agents working behind the scenes to instantly make decisions and execute tasks that may have taken humans days or weeks to complete.

This playbook brings together perspectives from Salesforce and implementation partner OSF Digital to examine how supply chain leaders can reduce manual coordination, connect workflows across systems and partners, and improve execution while maximizing the effectiveness of legacy technology.

A Forward Path: Four Actions To Move Beyond Manual Work

Action 1:
Map and Standardize Core Workflows

Action 2:
Connect Systems at Key Decision Points

Action 3:
Automate Repeatable Coordination Tasks

Action 4:
Embed Intelligent Workflows To Scale with Confidence

Action 1:
Map and Standardize Core Workflows

Manual work is made necessary when processes are not consistently defined. For many organizations, a single workflow is subject to endless variations as it plays out across teams, regions, and systems.

For example, supplier onboarding may look one way in one business unit but completely different in another. Order allocation may be shaped by individual judgment rather than shared rules. Returned products follow different paths depending on who handles them.

It's easy to see how variation becomes embedded in an organization. It's also easy to see how it can slow the entire process.

As a Salesforce implementation partner, OSF Digital begins by helping companies analyze existing processes, identify gaps, and design customized workflows that can scale across systems and teams.

"We'll do a lot of modeling of what's happening, examining their current approach," said John Coniglio, Senior Consultant at OSF Digital. "What are the gaps? What are the pain points? What are the opportunities for improvement?"

He often finds that gaps are rarely caused by a single failure. They are the result of processes evolving without a consistent structure.

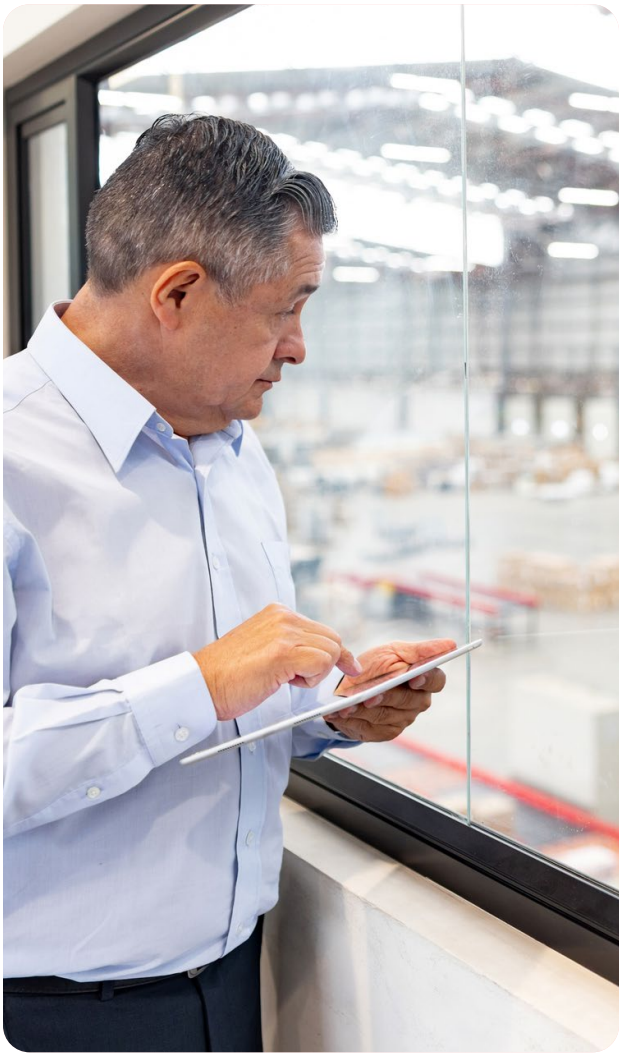
Taking Action

The path forward begins by defining how the work should be done. Until that's established, you can't begin to automate it.

OSF Digital works with clients to execute rapid, in-depth, end-to-end workflow mapping. They document business processes down to the task level because you can only uncover specific gaps, pain points, and real opportunities for automation when you understand how the work is being done at a granular level.

By using AI-native tools to instantly digitize these messy processes, OSF Digital can work quickly and effectively. Rather than standardizing everything before automation, the technology's contextual field matching resolves ambiguity and accelerates standardization.

This is the foundation. Once workflows are consistent, an organization is ready for automation that can connect systems and scale improvements.



What Standardization Unlocks

- **Consistent execution across teams**
- **Faster onboarding and training**
- **Reduced variation in outcomes**
- **A clear path to automation**

Action 2:
Connect Systems at Key Decision Points

Even with workflows clearly defined, pitfalls still await at the moments where critical decisions must be made.

Many supply chains rely on multiple systems, such as order management, inventory management, supplier platforms, and logistics tools. Each holds part of the picture, but rarely are they fully integrated. When a decision requires input from more than one of those systems, it usually calls for a human to compile the relevant information. This is where delays begin.

A planner needs to confirm inventory across locations. A supplier must be validated before an order moves forward. A return requires coordination between systems that were never designed to operate in sync. The data exists, but it's disconnected.

"When you have to start collecting information manually, people lean on their tools," Coniglio said. "They'll dump everything into Excel, and they'll do manual data entry into different systems."

These are coping mechanisms. Teams are doing what they need to do to keep work moving, even when systems fail them at critical moments. This is doable for a while. But as volume increases, human workarounds become a constraint.

"When you have to start collecting information manually, people lean on their tools. They'll dump everything into Excel, and they'll do manual data entry into different systems."

John Coniglio, Senior Consultant at OSF Digital

Taking Action

Leaders must identify the situations in which their teams step in and coordinate. Unifying the process calls for connecting platforms via event-driven workflows to enable real-time orchestration. That could look like:

Aligning order and inventory data.

Integrating supplier validation into an onboarding workflow.

Coordinating with external partners without relying on email or Excel

The goal is not to replace legacy systems. The goal is to connect them so they can work together to drive execution through automated processes and specialized AI agents that coordinate workflows and complete operational tasks in real time.

To reach those ultimate efficiencies, OSF Digital begins by seeking out quick, impactful wins.

Manual tasks with low variability are ideal for first automations, helping teams achieve immediate, measurable success as they build momentum toward more complex automations later.

Where Execution Breaks Down

Execution slows when teams must:

01

Pull data from multiple systems

02

Validate information manually

03

Coordinate across internal and external partners

Action 3:
Automate Repeatable Coordination Tasks

With workflows defined and systems connected, it's smooth sailing, right?

Unfortunately, not quite. Much of the support system within the supply chain process still depends on people to keep it moving. It's manually assigning tasks or validating data. It's emailing updates and routing approvals.

They are ingrained features of an outdated structure. And they come at a cost.

Every time a person must step in to move an otherwise automated process forward, delays and variability are introduced. Each person may do things a little differently. As volume increases, consistency becomes harder.

"This is historically an area where issues compound over time, given the complexity and scale of operations in this day and age. When you're automating those repeatable tasks, you no longer need to account for much of that mundane human work that adds time and latency to your process."

Kevin Arbeiter, Director of Agentic Industry and Supply Chain Strategy at Salesforce

Taking Action

Arbeiter pointed toward Salesforce's Agentforce Operations, launched in Spring 2026, as a major step forward. The platform uses AI-native technology to empower supply chain operations teams to turn outdated manual processes into clear, specialized tasks that AI agents can execute rapidly and silently in the background.

This includes:

01 Process coordination

02 Checking inventory

03 Verifying data

04 Acquiring approvals

As more tasks are delegated to AI agents, workflows become consistent and predictable. Processes begin to run on their own. And the results become quickly apparent. This is zero-training adoption. Cycle times decrease, and team members are now free to focus on tasks that require thoughtful, strategic human judgment.

What Manual Coordination Looks Like	What Changes with Automation and AI Agents
Sending follow-ups to keep work moving	Tasks move forward automatically
Collecting and validating information	Data is validated in real time
Routing approvals across teams	Approvals follow defined paths
Updating stakeholders across systems	Teams focus on exceptions, not routine work

Action 4:
Embed Intelligent Workflows To Scale with Confidence

Even well-designed workflows are put to the test as complexity grows. At this stage, the challenge is no longer just efficiency. It is responsiveness and the ability to trust how decisions are made:

How quickly can a supply chain adjust when conditions change?

How effectively can it handle exceptions without disrupting the entire process?

How confidently can it scale without introducing new friction?

As organizations look to embed automation and agentic AI into supply chain workflows, accuracy becomes critical. Deterministic AI models – designed to produce consistent, repeatable outcomes from structured inputs – help ensure that decisions are not just fast but also reliable. This level of precision is what allows organizations to scale with confidence. They know that the underlying logic driving their workflows will hold up under pressure.

Taking Action

If growth is the goal, then it's essential to move beyond static automation and toward workflows that can adapt and grow with you while maintaining a high degree of accuracy and consistency. This means embedding intelligence into the way work is executed, not just how it is triggered.

Growth-focused workflows are designed to:

01 Respond dynamically to new inputs.

02 Surface exceptions automatically.

03 Guide decision-making based on context.

04 Coordinate actions across teams and partners without manual intervention.

Arbeiter sees agentic AI as a catalyst that will enable smart, strategic growth by automating critical elements of the supply chain process.

"There's quite a bit of excitement and opportunity around how this scales," he said. "We're going to see a shift from leveraging AI as tools in our toolkit to managing the process flow and the AI agent work, rather than solely managing the humans."

This approach reflects a broader shift. Supply chains are becoming more responsive, more coordinated, and better able to operate with less manual oversight because the systems guiding execution are not only intelligent but also dependable.

At scale, predictability is critical.

Organizations that embed intelligent workflows can operate consistently even as complexity increases. They can respond faster to disruptions, manage variability more effectively, and scale operations without adding layers of coordination.

"We're scaling processes and reducing cycle times, sometimes 60% to 70%," Coniglio said. "When you're using tools that work in tandem with your legacy systems, you've got control over them, and you can be really efficient."

Designing for Flow

Supply chain challenges are usually rooted in execution.

The plans are sound. The systems are in place. The data is available. But the work required to move from insight to action is still fragmented, manual, and difficult to scale.

Designing for flow means rethinking how work moves through the supply chain.

The organizations making progress are not scrapping their legacy tech and starting fresh. They are reimagining how their existing systems operate together.

- **They are standardizing workflows so execution is consistent.**
- **They are automating coordination so work moves without constant intervention.**
- **They are connecting systems at the moments where decisions are made.**
- **And they are embedding agentic AI into workflows so operations can scale with confidence.**

Together, these actions shift the supply chain's role. Instead of reacting to issues as they arise, they anticipate, respond, and operate with greater consistency. It starts with asking the right questions.

- **Where are teams still stepping in to connect the dots?**
- **Where does work pause while information is gathered or validated?**
- **Where does execution depend on individual effort rather than structured workflows?**

The path from friction to flow does not require a complete reset. It requires a deliberate approach to how work is designed, so that it can move forward seamlessly. That is what it means to design for flow and open up the possibilities for growing a business while smoothly scaling every element of the supply chain process.

To learn more about how Salesforce and implementation partners like OSF Digital can help your organization reimagine how existing systems work together, visit our webpage.

Want to go deeper with an implementation partner?
See how OSF Digital brings Salesforce Agentforce Operations to life, connecting your existing systems and automating the manual coordination slowing your supply chain down. Learn more.

The information provided in this report is strictly for the convenience of our customers and is for general informational purposes only. Publication by Salesforce, Inc. does not constitute an endorsement. Salesforce.com does not warrant the accuracy or completeness of any information, text, graphics, links, or other items contained within this guide. Salesforce.com does not guarantee you will achieve any specific results if you follow any advice in the report. It may be advisable for you to consult with a professional such as a lawyer, accountant, architect, business advisor, or professional engineer to get specific advice that applies to your specific situation.

© Copyright 2026, Salesforce, Inc. All rights reserved.

Studio
by informa techtarget

Expert led.
Impact driven.

Studio is Informa TechTarget's global content studio offering brands an ROI rich tool kit: Deep industry expertise, first-party audience insights, an editorial approach to brand storytelling, and targeted distribution capabilities. Our trusted in-house content marketers help brands power insights-fueled content programs that nurture prospects and customers from discovery through to purchase, connecting brand to demand.

Learn more