OSF DIGITAL

From Pilots to Pattern:

The Operating Model for the Agentic Enterprise

PART 2

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Executive Summary

The capability question has been answered. The harder question is what to do with it. Three waves of AI are arriving in the enterprise simultaneously: domain-native applied AI being adopted at the functional level, platform AI embedded across Salesforce, SAP, and the hyperscalers, and developer AI from foundation model providers that has become the trust layer underneath everything. Each is real. Each works in isolation. None of them, on their own, produces an enterprise that operates differently.

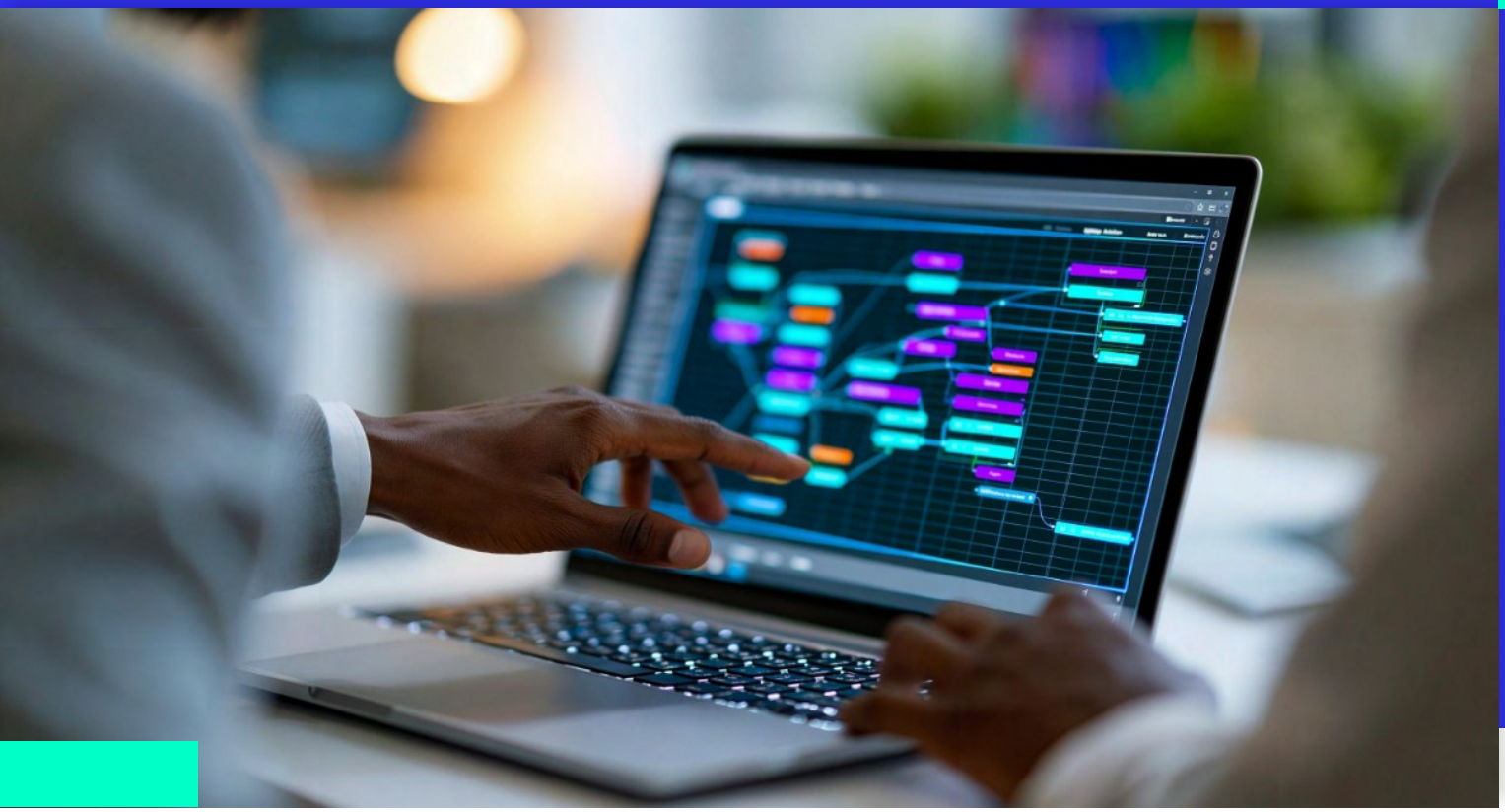
That gap, between what AI can do and what it is actually doing inside the business, has never been wider. Boards are asking for an AI strategy. Functions are running pilots. Most enterprises are stuck somewhere between urgency without clarity, technology without transformation, and pilots without momentum, while their advisers tell them contradictory stories about what to do next.

This paper sets out the missing layer of the agentic architecture and the operating model that turns it into compounding business value.

Agentforce Operations, built on the Regrello platform that Salesforce acquired, fills the gap that no other component of the Salesforce ecosystem had been able to close. It is an AI-native operating system for the back office, designed to digitize processes in minutes rather than months, orchestrate humans and agents in a single layer, and let business owners change workflows without IT. Early production deployments are showing meaningful reductions in cycle times, manual data entry, and labor cost per process.

But platform alone is not the answer. The paper introduces a four-phase delivery journey, from honest diagnosis to self-sustaining Center of Excellence, designed to put one process into production in four weeks and five in 12, with the operating model built in parallel rather than handed over at the end. It explains why the traditional systems integrator model is structurally misaligned with this work, and what a different kind of practice looks like: small, forward-deployed pods, new roles built for agentic delivery, and a reusable intellectual property flywheel that compounds across engagements.

OSF Digital has invested in building that practice. This paper is the working description of what it is, why it exists, and how to engage it.





Chapter One

The Disruption Is Real. The Response Is Not.

Three simultaneous AI waves are reshaping enterprise operations. Most organizations have witnessed the demos, run a pilot, and filed it under "promising." The gap between what AI can do and what it is actually doing inside your business has never been wider, and it is closing faster than most transformation calendars account for.

Three waves arriving simultaneously

1 Applied AI: domain-native solutions

Industry-specific AI built on top of foundation model infrastructure, including solutions in legal, supply chain operations, and the enterprise desktop, is being adopted at the functional level, often without central IT. These products are proving value in weeks, not quarters, and they are raising the question every CXO eventually asks: why isn't my whole organization moving at this speed?

2 Platform AI: the infrastructure moment

Salesforce, SAP, ServiceNow, and the hyperscalers are embedding AI natively across their platforms. The capability is there. What is not there, in most enterprises, is the operating model to exploit it. Sixty percent of business data still lives in spreadsheets and email. Thirty percent of revenue is lost to inefficient processes. The platforms are ready. The enterprise is not.

3 Developer AI: infrastructure as a commodity

Foundation models from Anthropic, OpenAI, Google, and the open-source community have become, effectively, a trust layer underneath everything. Every enterprise technology vendor now builds on top of them. The sophistication of what you can build has become extraordinary. The question has shifted from "can we build it?" to "do we have the method to operate it at enterprise scale?"

The enterprises that succeed will not be those that moved fastest. They will be those that moved with the right method, building conviction, capability, and momentum in a sequence that compounds.

The real gap: what CXOs are wrestling with

Urgency without clarity

Boards are asking for an AI strategy. Functions are running pilots. Nobody has a clear view of which processes to agentify first, in what sequence, and against what baseline. The pressure to move is real. The framework to move intelligently is absent.

Technology without transformation

Most enterprise AI pilots stall before production. The platform works. What does not work is the change model around it: who owns the workflow, who governs changes, how you bring people with you without the kind of friction that kills adoption at scale.

Pilots without momentum

Most organizations have succeeded at the demo. Some have succeeded at the pilot. Very few have succeeded at the pattern: the repeatable method that takes you from one working process to many in production, 1,000 users, and a self-sufficient Center of Excellence inside 12 months.

Conflicting advice

Traditional advisers say analyze everything, fix the foundations, then agentify. AI platforms say connect to the model and watch it scale. Both are wrong, for different reasons. Sequential multi-year programs do not ship. Instant pilots do not follow through to enterprise scale. The answer is deliberately in the middle.

SIGNAL FROM A RECENT ENTERPRISE ENGAGEMENT

In a recent first-call engagement, the customer arrived already thinking in terms of routing, approvals, visibility, and auditability, not "what is AI." They had self-sequenced their waves: Sales first, Supply Chain second. They had identified their own risk areas. That level of organizational sophistication is rare, and it reveals exactly the kind of gap this point of view addresses. The process clarity was there. The integration architecture, the operating model, and the delivery pattern were not.



Chapter Two

The Missing Piece of the Agentic Jigsaw

Agentforce Operations, built on the Regrello platform that Salesforce acquired, fills the gap that no other platform in the Salesforce ecosystem had been able to close. It is not an add-on to existing processes. It is an AI-native operating system for the back office, and its arrival changes the architecture of what is now possible.

What the early production evidence shows

Across production deployments, three signals stand out:

1. Reduction of 50-70% in process cycle times.
2. Reduction of around 80% in manual data entry as agents take on the grunt work.
3. Productivity improvement of approximately five times the typical automation average for AI-first processes.

Why this is different from what came before

Digitize processes in minutes, not months

Upload a standard operating procedure. Describe the process. A foundation model trained on industry best practices generates the blueprint: agents, assignments, compliance checks, approval workflows. The build cycle moves at a fraction of the speed of traditional code, no-code, or agentic framework tools. In one published reference, a semiconductor manufacturer built and launched a rebate process in three days.

Orchestrate humans and agents in one layer

The Process Manager runs end-to-end workflows autonomously, routing tasks to human approvers and specialized agents in the same flow, communicating via email and chat without requiring users to log in to another system. In production references, a commercial vehicle manufacturer reduced supply chain cycle times by 77%. A global automotive brand saves around 2,000 hours per month.

Improve continuously, with clicks, not code

Business owners change workflows without IT. The platform improves iteratively from performance and feedback, moving from human-first to AI-first, without breaking processes in flight. A major energy company redesigned its invoice process and reported approximately $40 million in annual savings. No re-architecture required.



What makes it enterprise-grade

Capability	Agentforce Operations	Alternatives (legacy workflow, generalist iPaaS, DIY)
Time to build first process	Approximately 1 hour	8 to 18 months
Time to change a live process	Minutes, no code	Months, IT dependency
Labor cost reduction	Approximately 80%	5 to 15%
Reasoning model approach	Deterministic execution. Foundation models used only where they excel (planning, query generation)	Probabilistic end-to-end, fragile in production
Human and agent orchestration	Native, same workflow, same audit trail	Separate systems, manual handoff
Integration architecture	Mature iPaaS, REST APIs, Salesforce Flow, and broad app coverage	Custom connectors, point solutions
Governance and access control	Role-based, attribute-based, time-based access. Full audit history.	Limited, built for one system

The Salesforce acquisition of Regrello is not a feature addition. It is a missing layer of the agentic architecture: the operating system that sits between the platform and the workforce and orchestrates both.

Where it fits in the Salesforce agentic architecture

Agentforce Operations occupies the system-of-work layer, sitting alongside Sales, Customer Service, Manufacturing, and Financial Services within Customer 360, connected upward to customer and employee agents (the system of agency), downward to Data Cloud (the system of context), and outward to any workspace through Slack. When combined with the full Salesforce platform, the integration creates a unified architecture for the agentic enterprise that no other vendor has assembled at this scale.

In production now: early adopters

Global enterprises across automotive, commercial vehicles, semiconductors, consumer goods, energy, electronic components, and natural resources have deployed Agentforce Operations in production. These are not pilots. These are production processes running with real users, real integrations, and measurable business outcomes. The proof points exist. The pattern is replicable.



The roadmap: capability compounding through this year

Salesforce integration with auto-sync via Flow. A REST API integration framework for direct ERP connectivity. Excel and document agents for unstructured data workflows. Conversational interface via Slack and Microsoft Teams. Process mining for intelligent process discovery. Migration onto Hyperforce for enterprise trust and security compliance. Each capability is building on the last, with the platform compounding through the year.



Chapter Three

Value in Weeks. Scale in Months.

The question every executive reaches after the platform demonstration is not "does this work?" It is "does this work here, on our processes, for our people, in a timeframe that builds organizational momentum rather than killing it?"

That question requires a specific answer. Not a consulting engagement that produces a strategy. Not a technology implementation that assumes the operating model takes care of itself. A structured, gated journey, from honest diagnostic to self-sustaining agentic enterprise, built around what the customer's organization actually needs to answer at each phase.

The four-phase journey to the agentic enterprise

Phase Zero: Imagine and Plan

The customer question: are we ready, and where do we start?

Align stakeholders. Define success metrics. Build the transformation roadmap. Establish governance. Onboard the workspace. Initiate Center of Excellence orientation. This is the phase where executive conviction is built from evidence, not declared up front and expected to hold.

Deliverables include: a process landscape map, a readiness assessment, an architecture gap analysis, a prioritized use-case set, and executive alignment.

Phase One: Launch (Proof of Value), weeks 1 to 4

The customer question: can we demonstrate real value fast enough to build momentum?

This is not a prototype, not a demo. A running workflow, built live in the customer's own environment, on a real process, with real data, and real users at the end of it. The Forward-Deployed Industry Strategist diagnoses the process from the inside. The Field CTO builds the blueprint live. The Value Engineer builds the ROI model from real baseline data. One process in production. Early adoption metrics captured. The organization sees it working before committing to the next phase.

Deliverables include: a live process blueprint, a quantified business case, a proven integration model, C-suite commitment, and a Fast Start contract.

Phase Two: Accelerate (Fast Start), weeks 5 to 12

The customer question: how do we expand from the first success and make the ways of working stick?

Five production processes live across a chosen business domain in 12 weeks. Not pilots. Production processes that real users run against real work every day. Simultaneously, the Center of Excellence is being built in parallel with delivery, not handed over as a document at week 12. Ways of working defined. Initial integrations deployed. ROI visibility established. Cross-functional adoption underway. The momentum is now visible to the organization.

Deliverables include: five processes in production, active Center of Excellence foundations, defined ways of working, validated ROI, and an expansion roadmap.

Phase Three: Scale, weeks 13 to 52

The customer question: how do we scale across the business without becoming dependent on an external partner?

The transformation compounds, or plateaus. The organizations that scale successfully are those whose internal Center of Excellence has genuine capability: the ability to identify new use cases, build new workflows, train new teams, and govern the agentic operating model as it grows across business units and geographies. Enterprise-scale adoption. C-suite-led operations ownership. A scalable process pipeline. Master data integrations. Measurable year-one ROI.

Deliverables include: an independently operating Center of Excellence, multi-domain expansion, internal talent capability, compounding value delivery, and year-one ROI.

What makes process selection the critical variable

THE SELECTION PRINCIPLE

Start where value is highest and readiness is real.

Process selection is not about choosing the most technically interesting domain. It is about finding the intersection of business value, organizational readiness, and proof potential: the process that can demonstrate enough impact to build conviction, is mature enough to not expose the automation to an immature underlying workflow, and is accessible enough on the integration side to prove the architecture without a six-month infrastructure program first.

A PRACTICAL EXAMPLE FROM THE FIELD

In a recent engagement, the customer had already done this thinking. Their sales process was mature, documented, and close to ready. Their supply chain was actively being standardized, and automating it at that point would expose the immaturity and erode trust faster than it would build value. That self-awareness is the starting point for a successful engagement. The first phase gate is process completeness confirmed, integration architecture walked through concretely, and operating model ownership named before any build begins.

That same engagement surfaced its clearest signal and its biggest risk in the same breath. The customer had only seen flat-file demos. No architecture walkthrough. No clarity on how the platform connects to their real systems. That gap, between demo confidence and production trust, is the number one blocker in every enterprise deployment we have run. The integration architecture is not a technical detail to resolve later. It is the proof point that determines whether the executive sponsor can justify the investment to their board. It must be addressed before any statement of work is signed.

Customers don't buy slides. They don't buy architecture diagrams. They don't buy AI promises. They buy working value, demonstrated in their environment, on their processes, against their data.



Chapter Four

A Different Kind of Systems Integrator

Building a sustaining agentic enterprise practice is not a consulting engagement layered on top of an existing systems integrator model. It requires a different operating model, different roles, different ways of working, and a willingness to invest ahead of the market before the market has fully formed. OSF Digital has made that investment. What follows is what it looks like, and why it matters to every customer considering this transformation.

Why the traditional systems integrator model fails agentic

Dimension	Traditional global integrator approach	Agentic systems integrator approach
Starting point	Analyze everything. Fix foundations. Then agentify.	Start with one high-value outcome. Prove it. Layer from there.
Time to first value	Sequential, multi-year. Nothing ships until foundations are done.	First process live in 4 weeks. Five in production by week 12.
How they sell	Demo-led. Feature sale. Architecture diagrams.	Industry-process-led. Jobs-to-be-done outcome and value-led. Working blueprint in the room.
Delivery model	Large project teams. Long discovery. Waterfall into agile.	Forward-deployed pods with domain expertise, Field CTO, and value engineering in one coordinated unit.
Center of Excellence	Handed over as a document at program end. Customer dependent indefinitely.	Built in parallel with delivery from week 1. Customer owns it before we leave.
Intellectual property	Rebuilds from scratch per engagement.	Reusable industry process libraries, blueprints, ROI models, and playbooks. Every engagement enriches the next.

The forward-deployed pod model: new roles for a new era

Agentic delivery cannot be done from a project room. The pod model places domain expertise, technical depth, and value engineering inside the customer's environment, working in the workshops where processes actually happen, not in the slide decks where they are described.

Forward-Deployed Industry Strategist

Diagnoses the process from the inside. Understands the cognitive workload, not just the documented process, but how the job is actually done and where the friction lives. Translates between business reality and agentic capability.

Field CTO

Builds the blueprint live in the workshop. Bridges the integration architecture conversation with the business value conversation. Surfaces the objections early and addresses them with working evidence rather than slides.

Value Engineer

Builds the ROI model from real baseline data, not projected estimates. Ensures the C-suite sponsor has the evidence they need to commit internally at every gate, not just at program close.

Agentic Change Engineer

Governs the change that surrounds the technology. Who configures workflows going forward. How the new software delivery lifecycle operates post-build. How the organization is brought with the transformation rather than surprised by it. This role does not exist in traditional systems integrator delivery. It is essential in agentic.

Domain Architect

Designs the integration layer for real systems, not flat-file demos. Maps every system touchpoint, confirms API availability, scopes custom connectors, and ensures the architecture conversation happens before commitment, not after.

Center of Excellence Builder

Does not hand over a document. Builds the customer's internal capability in parallel with every delivery sprint. Knowledge transfer is continuous, not compressed into week 12. The measure of success is whether the customer can run the next wave without us.

The intellectual property flywheel: what makes the practice compound

FOUNDATION, IN BUILD: PROCESS SELECTION METHODOLOGY

A scoring framework that prioritizes automation candidates across value, feasibility, integration readiness, and ROI potential. Prevents the most common mistake: starting with the wrong process and losing momentum at the worst possible moment, early.

FOUNDATION, IN BUILD: WORKSHOP TO BLUEPRINT ACCELERATOR

AI-parsed workshop transcripts generate agentic configuration. Blueprint time cut from weeks to hours. Customers see a working process on the day of the workshop, not in the follow-up deck three weeks later.

FOUNDATION, IN BUILD: INDUSTRY PROCESS LIBRARIES

Pre-built blueprints by vertical, including financial services, manufacturing, consumer goods, automotive, and health and life sciences. Every new engagement starts from a proven library, not from a blank page. Every engagement enriches the library for the next customer.

What we have already built

PROVEN: FIRST REFERENCE DEPLOYMENT

Our first reference deployment generated more than $300,000 in annualized value within four weeks. Delivered with a lean team of three. Five prioritized sub-processes automated. Working Center of Excellence foundations established. The customer's chief process officer summarized the engagement as moving at a pace that felt as though the teams had worked together for years. That is what a mature agentic practice looks like from the inside.

LIVE NOW: OPERATIONAL PODS READY TO SCALE

A live co-sell proof-of-value motion is running across qualified pipeline in multiple industries. Pods are certified and operating in parallel. Every pod runs the same methodology, the same playbook, the same intellectual property, regardless of region. Adding a new geography is a matter of weeks, not months. The flywheel is already turning.



OSF Digital has invested in building a dedicated agentic enterprise practice from the ground up, with the operating model, the talent framework, the pod structure, the methodology, and the intellectual property to make it replicable at global scale.

What a sustaining practice requires: lessons from the field

The signals from recent engagements are not unique to any single customer. They are the signals every enterprise sends when it is genuinely ready to move, and they define exactly what the systems integrator practice needs to be able to answer.

STRONG SIGNAL: INTEGRATION ARCHITECTURE MUST BE THE PROOF POINT, NOT THE FOOTNOTE

Flat-file demos create false confidence. Every enterprise deployment eventually hits the integration wall. A mature practice walks through concrete architecture before commitment. The Domain Architect and Field CTO must be in the room early, not after the statement of work is signed.

STRONG SIGNAL: PROCESS CLARITY BEFORE AUTOMATION, ALWAYS

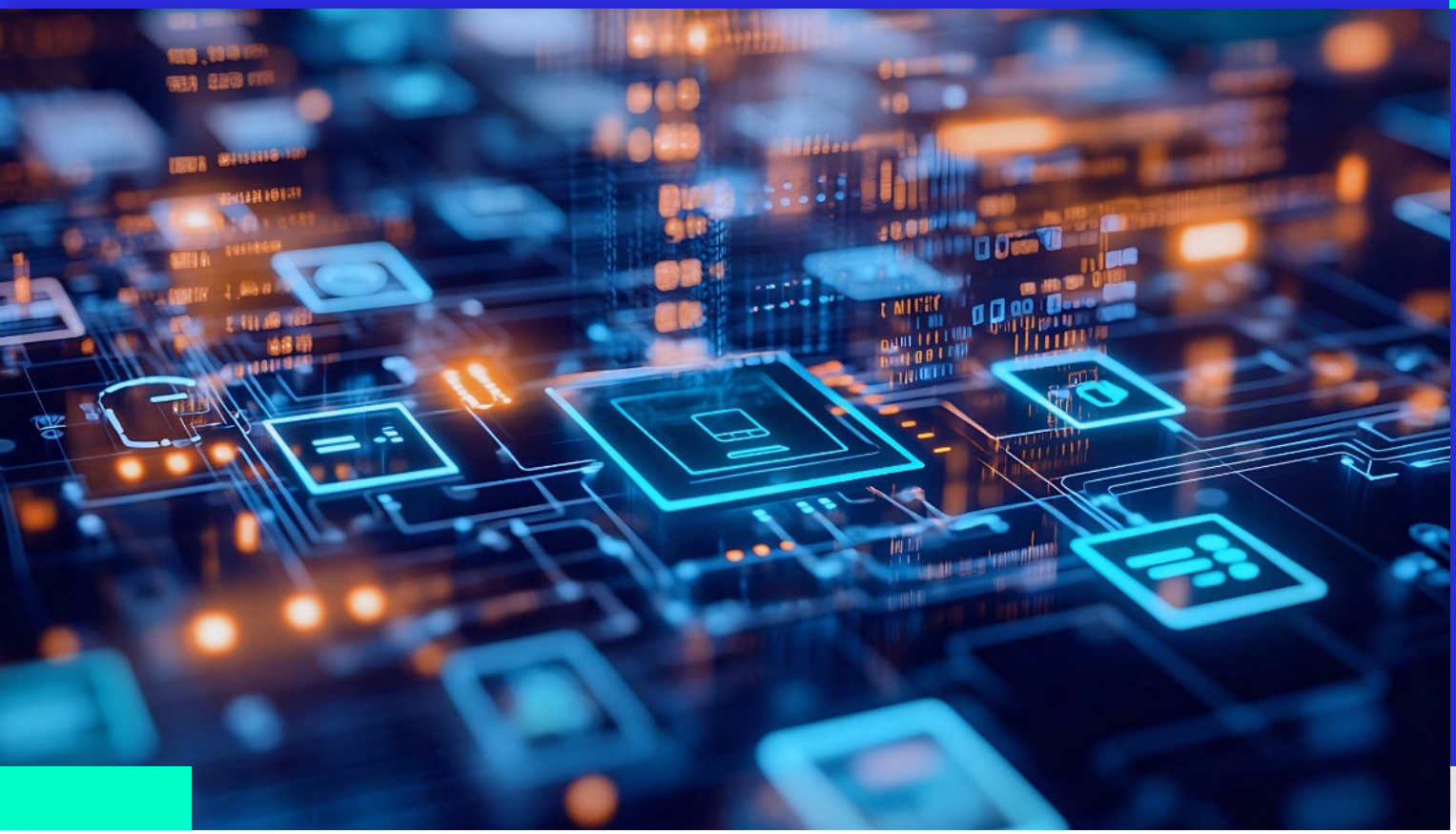
Automating an immature process exposes the confusion faster than it fixes it. The practice must act as a process readiness partner, not just a platform deployer. The phase-gate model is not bureaucracy. It is the mechanism that prevents the most expensive mistake in agentic transformation.

MUST RESOLVE: OPERATING MODEL AS IMPORTANT AS THE FIRST BUILD

Who changes a workflow when the process evolves? Who governs the agent behavior as it scales? Who supports production issues? Without named owners and a defined governance model, the customer is dependent on the systems integrator indefinitely, or the deployment breaks silently. Both outcomes are unacceptable.

MUST RESOLVE: THE PILOT MUST BE REPLICABLE BY DESIGN

The goal of the first workflow is not workflow number one. It is the pattern that produces workflows 2, 3, and 10 without starting from scratch. Every element of the first delivery, the integration model, the governance approach, the operating model, must be designed with replication in mind from day one.





The journey is yours. The method is ours.

The questions in Chapter One are yours to answer. What a partner can do is bring a methodology that ensures you answer them in the right order, at the right pace, with the right evidence at each stage. That is what this practice was built to provide.

We are ready to start Phase One with you. That begins not with a project plan, but with an honest conversation about where your organization actually is, and what it will take to get where you want to go.

Start the Diagnostic

Every engagement we run begins the same way: an honest assessment of where your organization actually sits on the agentic enterprise journey, which process domain holds the strongest first proof point, and what governance and architecture decisions need to be made before any build begins.
This is Phase Zero of the journey described in this paper. It commits you to nothing further than seeing your own organization clearly, with the benefit of a partner who has run this conversation many times before.
When you are ready to move into Phase One, we are ready to build a working agentic workflow in your environment within four weeks.

Contact OSF Digital to start the diagnostic.

About OSF Digital

Where AI, Data, and Trust Deliver Business Reinvention.

OSF Digital is a Salesforce-first consulting partner helping organizations turn AI, data, and trust into measurable business impact. With 20 years of hands-on Salesforce experience and deep platform (multi-cloud) expertise, OSF guides clients from strategy to implementation to managed services across industries.

We get our customers to value, faster—whether by modernizing legacy systems, unlocking Customer 360 with data, or creating the digital workforce with Agentforce. Known for our award-winning delivery and distinctive partnership mindset, we act as an expert extension of our clients' teams to deliver lasting impact and measurable results. With regional hubs across North America, LATAM, EMEA, and APAC, we combine global reach with personal, high-touch delivery. For more information about OSF Digital, visit osf.digital.


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