

Issue #2 | October 2025

THE ALGORITHM:

What It Means To Be an AI-First Company

Microsoft's Three-Filter Test

Exclusive learnings from
900+ AI projects

Bias-Proofing Your Algorithms

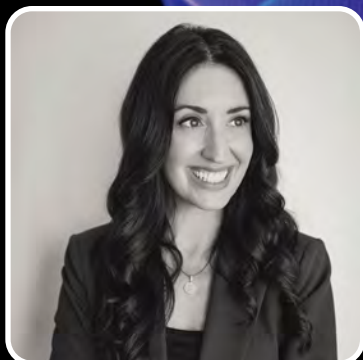
Why unfair systems deliver
inferior business results

The Rise of Agentic AI

Aptean's Henk Heus on
intelligent systems that think,
learn and act autonomously

Plus:

What Does Being An AI-First
Company Actually Mean?



***“AI cannot be plug-and-play
or one-size-fits-all. It’s choose-
your-own-adventure.”***

Futurist Erica Orange on why there’s
no standard playbook for AI success

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Business Leaders Have Access to More Data Than Ever Before

So, the challenge isn't collecting information—it's turning it into timely, actionable insights that drive better decisions.

This is where artificial intelligence (AI) creates genuine competitive advantage. But realizing its potential means asking the right questions from the start—not what AI can do, but what problems you need it to solve.

And here's what manufacturers and distributors are learning: Solving these problems requires systems that can connect, analyze and act on information from across your entire operation.

That's why the organizations achieving measurable AI results share a common foundation: cloud infrastructure. Legacy, on-premises systems create silos that prevent you from getting complete answers to your business questions.

Moving to the cloud isn't just a technical upgrade. It makes possible the connected, intelligent operations that AI requires to deliver real value.

TVN Reddy
CEO, Aptean

01



Vision Before Strategy:

Futurist Erica Orange on Leading AI Adoption During Relentless Change

Conventional wisdom says successful artificial intelligence projects should start with technology. But the best results often come from looking inward first. The paradox, says futurist Erica Orange, is that the most significant technological revolution in decades demands the most human discipline: knowing thyself.

Most companies are throwing resources at machine learning models without spending enough time setting clear goals. Too few are asking critical questions: What problem are we solving? Who benefits? How will this change who we are?

Orange has made a career of helping organizations anticipate and make sense of change. In her words, “vision must come before strategy.”

This October, Orange is the keynote speaker at Aptean UNITE 2025 in Orlando, Florida, where she will address the conference theme “Elevate Your Game” and help manufacturing and distribution leaders prepare for what comes next.

Ahead of her keynote presentation, we sat down with Erica to discuss the strategic imperatives for AI adoption, managing organizational change and preparing for an uncertain but opportunity-rich future.

How should companies be approaching AI projects to ensure success?

Any business must first start by asking themselves two simple yet fundamental questions when it comes to implementing AI:

1. What problem am I trying to solve?

2. Who does it benefit?

Because, ultimately, what AI comes down to is this: the redeployment of human time and talent to serve more strategic ends. It’s not just about cost-cutting; it’s about reallocation. Reallocating time and talent in new and unforeseen ways.

Then from there, any business must then ask: How does AI fit into our long-term vision? We must remember that AI isn’t a panacea. AI cannot be plug-and-play, nor is AI one-size-fits-all. It’s more “choose-your-own-adventure,” leading to greater personalization, precision and predictive capabilities.

Another question to ask is: What will it take to win? Companies need to create an internal culture that rewards innovation, experimentation and collaboration.



Erica Orange is a partner at The Future Hunters, a premier futurist consultancy, where she converts complexity into actionable insights for cross-industry leaders. Her expertise in deciphering global trends has made her a trusted advisor to organizations worldwide, and her dynamic presentations have captivated audiences at over 300 conferences across Europe, Latin America and Asia.

As the author of “AI + The New Human Frontier: Reimagining the Future of Time, Trust + Truth,” Orange offers a visionary exploration of how artificial intelligence will reshape the human experience.

Her work has been featured in Wired, NPR, Bloomberg and CBS This Morning, and she was recognized as one of the world’s 50 Top Female Futurists in 2020.

“Leaders must be able to articulate not just what AI will do, but why it matters for the organization’s future.”

AI-driven change can feel daunting to many organizations. What is your advice for leaders trying to bring their teams along on this journey?

Leaders must first remember that vision comes before strategy. Vision is about clearly defining who you are and what you stand for. From there, you can begin to define your strategies, but the key is keeping them—and your thinking—nimble and flexible.

Do not be tethered to one set of strategies. View them instead as a set of parallel railroad tracks. Have one track for your short-term strategies (one to two years); have another track for your medium-term strategies (three to five years); and have another track for your long-term strategies (five to eight years and beyond).

Each strategy track must be built to be adaptable. You have to be able to jump on and off each, refine it, abandon what doesn’t work and rebuild it. Then what becomes your North Star is vision, not strategy.

It will be important to hold to a timeless vision and be willing to quickly adopt and then scrap even the biggest of strategies—particularly when it comes to AI because it is changing so quickly.

Leaders must also be able to articulate not just what AI will do, but why it matters for the organization’s future. And this includes being able to equally articulate what AI cannot do.

As AI reshapes job roles, what strategies should companies employ to ensure their employees are equipped to work alongside advanced technologies?

One way is to create experiential learning opportunities. Companies should look to set up safe, interactive environments where employees can experiment with AI tools relevant to their work. Giving employees the time and space to simply play around with these tools allows them to learn through doing. It’s also a great way to build both competence and confidence.

Another way is to continuously iterate. Are employees using AI tools effectively? Are they making better decisions? Are they more adaptable to new technologies? This way you’re able to track actual behavior change and impact. These insights can then be refined to help identify emerging skill needs.



AI's capabilities are constantly evolving. How can organizations thrive on this constant change rather than resist it?

Think about allocating specific budgets and resources for “innovation time” where teams can explore new AI tools. Make it fun, like when we were kids on the playground! The key is making experimentation systematic rather than ad hoc, and to create testing grounds for new approaches before scaling them across your organization.

Cultural shifts toward experimentation, learning from failure and rapid adaptation are also critical. More companies are implementing “fail-fast” cultures where quick failures are viewed as learning opportunities, creating psychological safety for experimentation, rewarding innovation and learning rather than just successful outcomes.

The businesses that “get it” will be the ones that view AI as a capability multiplier (e.g. for enhancing human potential) rather than a cost-cutting tool. But we also need a healthy dose of realism. No matter how quickly things are moving, we must also understand that not all change is fast and not everything is changing. Some traditional methods and practices may persist alongside new technological developments, creating a blend of old and new in our daily experiences. Daily frustrations with old, antiquated systems will still exist.

How should companies prepare for AI developments they cannot anticipate?

The future is ambiguous. People love to have a sense of predictability because it provides us with some semblance of control. But the pace of change is relentless. And the exact trajectory—no matter how hard we try—is one that we will never be able to pinpoint with any certainty.

We are also likely to see a growing disconnect between technological acceleration and bureaucratic systems designed for a prior economy. What this will undoubtedly lead to is more inefficiency and dysfunction as institutions designed for the industrial age attempt to regulate and harness technologies evolving at digital speed.

*Erica's book, **AI + The New Human Frontier: Reimagining the Future of Time, Trust + Truth** is available now.*

Buy the Book

02

Choose Carefully, Learn Quickly, Measure Impact: The DNA of Successful AI Projects



Eduardo Kassner, CTO of Cloud & AI for the High Tech Sector at Microsoft, shares his learnings from deploying over 900 AI projects across major technology companies worldwide.

Most organizations approach AI with expansive wish lists and ambitious timelines. How can they cut through the noise to identify genuinely viable use cases?

The worst thing you can do with AI is invest huge amounts of money without a solid business case. Otherwise, you'll end up asking "what did we get out of this?" That's a shame, because AI is a super useful tool—so long as you understand what it's for.

No AI project is equal to another, so you need to find something important enough that pushes people to do the research and solve a problem.

What framework do you use to separate high-impact AI opportunities from expensive experiments?

We apply three filters to every project. **First:** Is there a clear purpose backed by real need? Not something that's interesting, but something a key stakeholder can't live without—and that your CEO will agree is worth investing in. It needs to matter all the way up to board level.

Second: Can you measure it? Not with a general benefit statement that can't be verified, but with measurable results which nobody can dispute.

Be careful about the metrics you choose, because you can only squeeze so much efficiency from your business. I get excited about projects that drive growth and make people more successful; projects that use AI to raise all boats.

Third: Is it technically feasible and viable right now? You should be able to build it using existing tools and technologies without having to invent anything new.

Most companies come to my team with lists of 60-100 use cases. These three filters usually reduce that list to three to five projects, which is exactly what you want. This process helps you avoid "AI washing." You don't want to build something just because everyone else is doing AI.

Many companies struggle with the transition from AI concepts to scaled production systems. What's your methodology for de-risking this process?

We have a very specific progression: three projects in three months, following a clearly defined process.

First, we encourage companies to do "hackathons," which get people excited and generate ideas. Then we apply our three filters to narrow those ideas down to a focused project list.

Next comes proof of concept (POC) to demonstrate that these specific ideas could work with that company's data and systems. Maybe you're not sure this part can connect with that piece of data, or you need to verify that one component will work with your existing systems. Now's the time to work it out.

Then you build a minimum viable product (MVP). This is where organizations figure out how it's going to work in production, what it's going to cost and who's going to manage it. Once you catch the tiger, who's going to feed it and clean the cage?

When you've followed this process successfully with your first few projects, you can scale it to dozens of AI initiatives. Your organization understands how to adopt AI, knows the process and has built the internal capability to execute plans systematically.

This phased approach prioritizes organizational learning as much as technical delivery. How pivotal is education and mindset to AI success?

AI adoption is as much psychology as it is technology. You're dealing with something very new that makes people uncomfortable, and you need to prove the process works.

But you also need to understand that you're going to fail often with AI, and senior stakeholders can find it hard to learn that risk and failure are part of the process. Traditional business thinking says, "be right a lot," but AI involves uncharted waters.

The key is learning how to label "failures" as experimentation. This is more important in AI than any other development I've seen in my career. Every setback should teach you something that you can apply to your future AI projects.

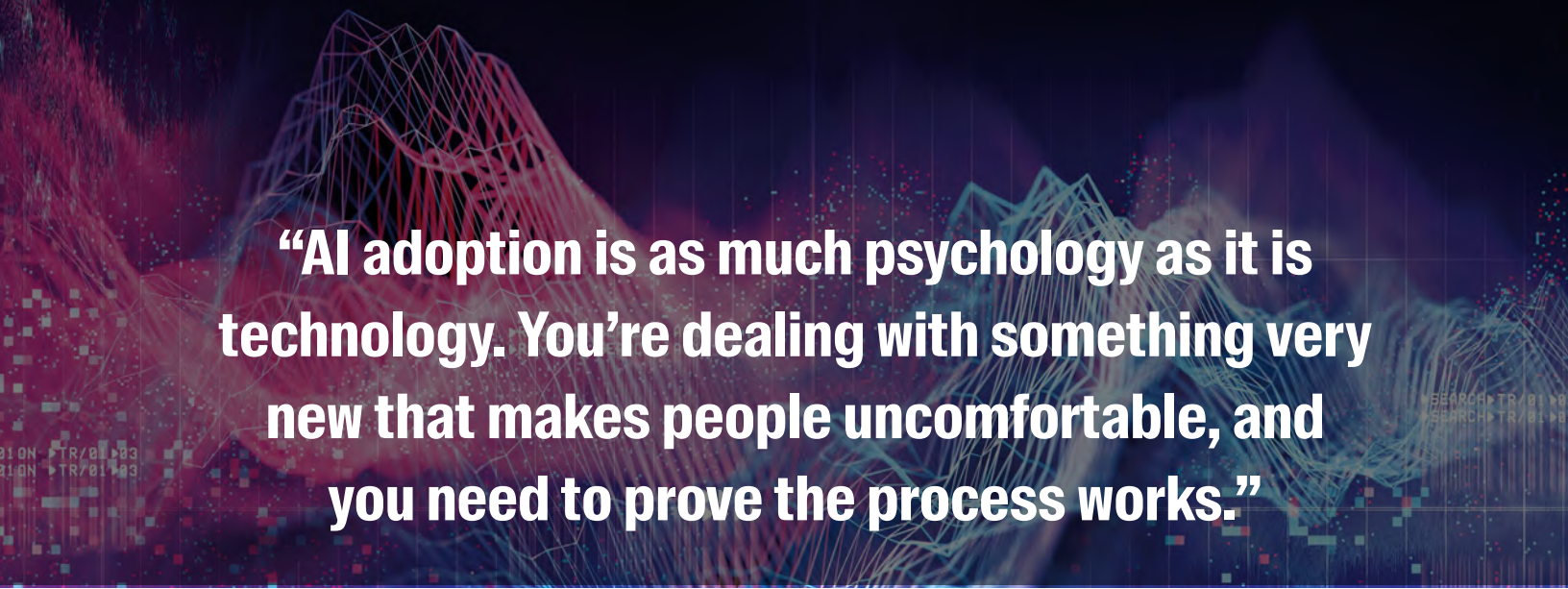
What should business leaders understand about the technical reality of deploying AI projects?

The biggest misconception is that AI involves throwing data at a large language model (LLM) and getting magic back. But no AI project uses only LLMs or generative AI. Every single project uses a lot of data, querying, standard databases, multiple data sources and old-school code.

Every project that goes into production uses, on average, 6-14 different models. You might use translation services, computer vision, document recognition, speech-to-text, data vectorization and/or various data science models.

What's more, most enterprise AI systems work as multi-agent architectures; different AI components handling specialized tasks that need to work together seamlessly.

Let me give you an example. Say you want an AI tool that helps calculate taxes. You need one agent that validates whether the user's question is appropriate. You need another that checks if the user provided all necessary documents. You need sub-agents that handle different aspects: one for property taxes, another for different state requirements and so on.



“AI adoption is as much psychology as it is technology. You’re dealing with something very new that makes people uncomfortable, and you need to prove the process works.”

Then you need a coordination layer that manages all these specialized agents, and finally a quality assurance component that evaluates whether the answer meets your standards based on the last 10,000 responses you’ve provided.

This is why we do POCs and MVPs: to understand all these moving parts before committing to full production.

Cost management is a critical but often underestimated aspect of AI strategy. How do you balance technical ambition with financial sustainability?

AI can get very expensive: not because the units are costly, but because consumption can explode quickly. You need to make the solution viable for the long term. Is the juice worth the squeeze?

Sometimes what seemed exciting during the POC phase becomes a budget nightmare six months later.

You’ll probably end up using multiple types of databases and balancing smaller and larger models to keep costs manageable and make the solution viable for the long term. The key is building something you can not only run and operate but also finance sustainably.

And remember that these systems will evolve over time—you can swap models as newer, better ones become available.

Does company size affect the success of AI implementation?

It’s not really about the size of the company. It’s about having a clear purpose. Small organizations often

have sharper focus and can execute ideas faster, which gives them an advantage. I’ve seen smaller teams build incredibly strong solutions in shorter timeframes than major enterprises.

Large companies can get tangled in their own legacy systems and politics. The worst situation is when a big decision-maker comes in talking about company-wide initiatives, and a year later you’re still talking about that initiative instead of delivering the actual output.

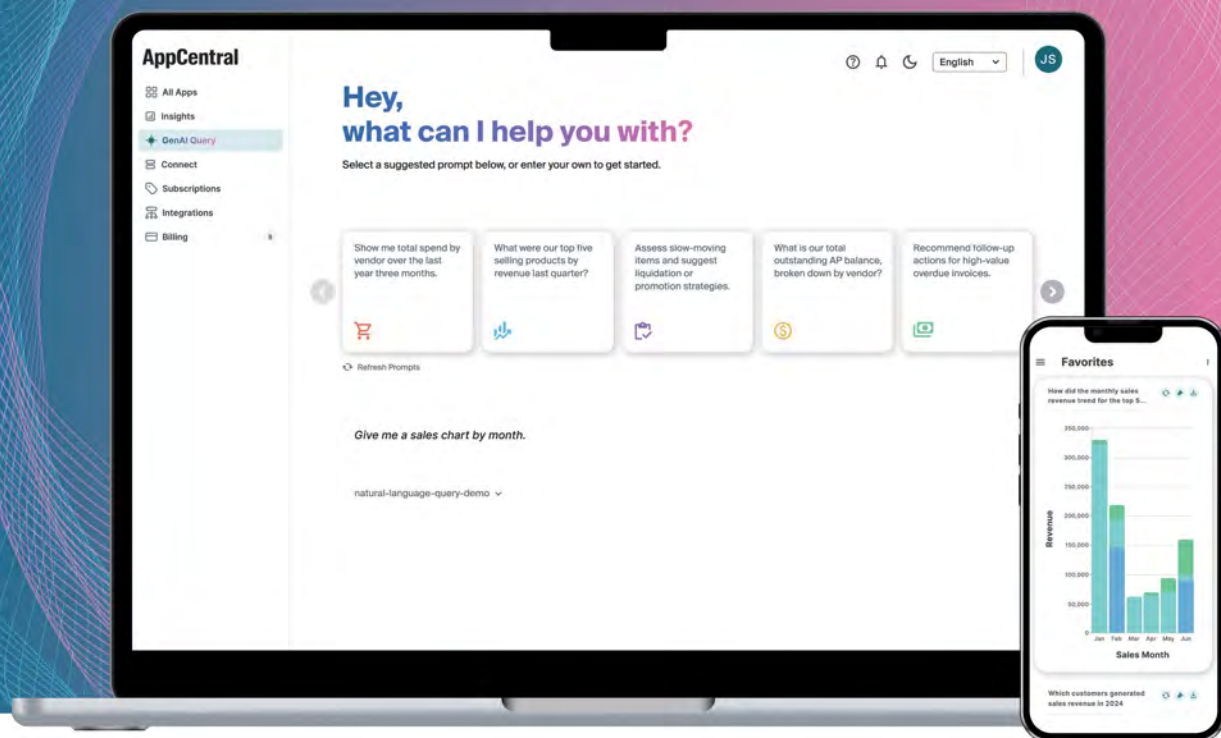
What’s the one key thing that determines whether an AI project succeeds or fails?

Clarity of purpose. If you’re building something because it’s really cool or because everyone else is doing AI, it’s going to fail.

I can’t tell you how many projects I’ve worked on where I ask, “what are you doing this for?” and the company responds, “because it’s critical for us.” That’s not an answer. It’s not specific, meaningful or useful for project success; the company hasn’t done the due diligence to understand the real purpose.

Don’t get caught up in the technology or the hype. Focus on finding those two or three projects that will really move the needle. And approach it systematically, being prepared to experiment and learn from failures.

The companies succeeding with AI are the ones that treat it as a strategic capability to build over time, not a magic solution to implement once and forget about.



Asking Better Questions: How Aptean's GenAI Query Bridges Theory and Practice

Erica Orange and Eduardo Kassner emphasize the same critical insight: Successful AI adoption begins with asking the right questions. GenAI Query, now available within AppCentral, puts this principle into practice.

Rather than wrestling with complex dashboards or waiting for IT reports, teams can use GenAI Query to ask your questions directly—like "Where are my fulfillment bottlenecks?" or "Which SKUs are eroding our margin?"—and receive immediate, contextual answers from live enterprise data.

From Insight to Action

As we explored in our previous issue, AppCentral deploys pre-built AI agents to automate and enhance your workflows. GenAI Query is the next step in this process: conversational intelligence that eliminates the gap between having questions and finding answers.

The technology addresses a fundamental challenge associated with AI adoption: the need for AI implementations to deliver immediate, measurable value.

Instead of requiring teams to learn new interfaces or wait for custom reports, GenAI Query allows front-line managers, operations leads and finance teams to interact with their data as naturally as asking a colleague.

This approach directly supports Erica Orange's "vision-before-strategy" principle. Companies can focus on defining what matters most to the business, then use GenAI Query to continuously monitor and measure those priorities without getting lost in technical complexity.

“AppCentral is the foundation for our customers to harness the power of AI—GenAI Query is the intelligence that brings it to life, it’s the difference between staring at a dashboard and having a direct, insightful conversation with your business.”

TVN Reddy, CEO, Aptean

Real-Time Intelligence, Built for Your Business

What sets GenAI Query apart from other generative AI tools is its deep integration with manufacturing-specific workflows. The system understands the complexity, terminology and processes unique to the discrete manufacturing, food and beverage, transportation and apparel industries.

This expertise ensures that when someone asks about “margin pressure” or “inventory risk,” the AI provides contextually relevant insights rather than generic responses.

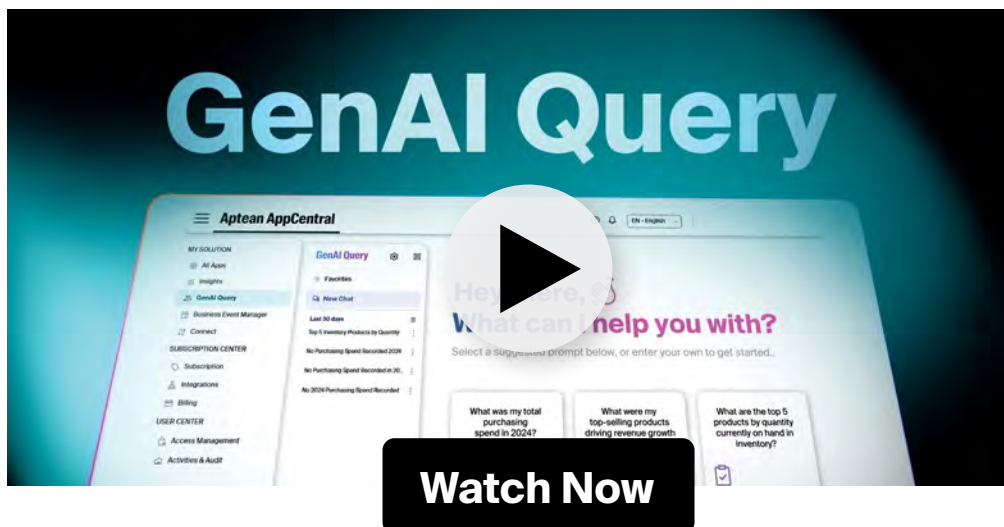
The AppCentral platform unifies live ERP data across inventory, purchasing, sales, receivables and payables, creating a single source of truth that teams can query via natural language. Role-based access controls and audit trails maintain enterprise security while enabling broader access to business intelligence.

Making Every Employee Insight-Driven

GenAI Query allows manufacturers to start small—perhaps by asking simple inventory questions—then gradually expand to more sophisticated analysis as confidence and understanding grow.

As thousands of customers onboard to AppCentral, GenAI Query provides the conversational layer that makes AI adoption both approachable and immediately useful—which is exactly what both futurists and practitioners agree is essential for lasting success.

Learn About Aptean GenAI Query





04



Technical Perspective: Aptean's Henk Heus on AI Agents

GenAI Query exemplifies how AI enables intelligent systems that understand context, make autonomous decisions and seamlessly integrate across enterprise platforms.

Dr. Henk Heus, Associate VP at Aptean, explains how this new generation of AI agents will reshape operations beyond simple automation.

The future of AI in business operations is not replacing human decision-makers. It's creating intelligent agents that can handle the repetitive, time-consuming tasks that prevent people from focusing on high-value work like root cause analysis and strategic improvements.

What we're seeing with agentic AI is a significant evolution beyond traditional rule-based automation. While previous systems operated on simple "if this, then that" logic, agentic AI can make autonomous decisions by understanding context, reading complex documents and drawing conclusions from current and historical data.

The key is connecting these agents to multiple business systems simultaneously. Pulling customer data from your CRM, checking inventory levels in your ERP system and referencing your quality standards, all while maintaining security protocols and role-based access controls.

We're also now seeing AI agents that can learn and improve over time. They can analyze patterns in how successfully different processes are handled, identify bottlenecks and even suggest optimizations. This creates a feedback loop where operations become more efficient without requiring constant manual oversight.

We're still in the early stages, but the potential is enormous. Imagine agents that can automatically schedule maintenance based on equipment performance data, route urgent orders to the most appropriate team members or generate compliance reports by pulling information from multiple systems.

The human element remains critical for oversight, decision-making and handling exceptions, but the routine work becomes autonomous.

***“We’re not replacing humans;
we’re augmenting workflows
and making things easier.”***

What Is Agentic AI?

Agentic AI systems can accomplish specific goals with minimal supervision through three core capabilities:

- 1. Autonomy (performing tasks independently)**
- 2. Adaptability (learning from interactions)**
- 3. Goal orientation (reasoning about objectives)**

Unlike traditional automation or generative AI that responds to prompts, these systems have purpose. They pursue goals, integrate data from multiple sources, call APIs, query databases and make decisions based on learned patterns while maintaining appropriate governance controls.



Digital Planning Intelligence: Rewriting the Rules of Supply Chain Strategy

Supply chains are under relentless pressure from volatility, disruption and shifting consumer expectations. Meeting these challenges requires a new way of planning—one that moves beyond slow, siloed processes to deliver speed, agility and clarity.

Piet Buyck, SVP Industry Principal at Logility, explores how digital planning intelligence is rewriting the rules of supply chain strategy, and why organizations that embrace AI-driven planning will set the pace in the years ahead.

Traditional Supply Chain Planning No Longer Measures Up

Unpredictability has long been a defining feature of the supply chain. While its flavor and intensity may vary, one constant remains: change. In this environment, the most valuable asset a supply chain manager holds is a plan—one that aligns with organizational strategy and drives execution across financial planning, inventory optimization and marketing initiatives.

Yet, traditional planning frameworks such as sales and operations planning (S&OP), sales and operations execution (S&OE) and integrated business planning (IBP) are increasingly inadequate for today's

volatile markets. These processes are slow, labor-intensive and often disconnected from real-time events. They produce plans anchored to opaque strategic goals, lacking the agility and clarity needed to respond to market shifts as opportunities rather than threats.

The result? Decision-making slows, performance suffers and organizations become more focused on hitting static targets than achieving meaningful outcomes.

The Rise of AI-Driven Planning

AI is redefining the planning landscape. Organizations that embrace AI-driven planning are already 70% ahead of their competition. They're achieving 6% higher profit margins, creating plans at 30% of the cost and improving forecast accuracy by 20%. These competitive gaps will only widen as generative AI (gen AI) and narrow AI reshape the supply chain.

This new paradigm replaces static spreadsheets and reports with dynamic, event-driven decision-making. It empowers planners to act with speed, clarity and confidence—using natural language interaction, real-time collaboration and explainable insights.

Translating the World Into Digital Insights

Modern planning solutions have redesigned traditional analog processes with built-in AI, enabling cross-functional teams to translate the world into digital insights. These insights are built on a supply chain ontology—a structured framework that maps concepts and their relationships. This ensures that data is expressed in business terms, providing clear, actionable intelligence that is easily understood across the organization.

By combining gen AI and narrow AI with deep supply chain expertise, these systems build trust with high efficacy while avoiding common pitfalls like data privacy concerns and hallucinations that can plague generic AI platforms.

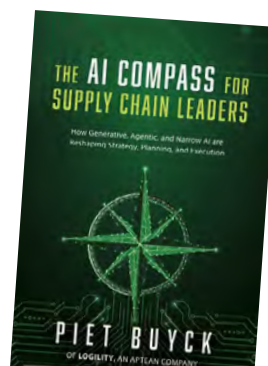
Historically, supply chain systems required specialized expertise to answer complex questions. Today, AI democratizes access to information. Users no longer need to master multiple tools or possess technical skills. Through natural language interfaces, anyone can ask business-relevant questions and receive transparent, explainable responses—building confidence and accelerating decision-making.

Planning That Speaks Your Language

This new language of planning is more than a technological upgrade—it's a reimagining of how planning works. It replaces static tools with dynamic, AI-powered collaboration. It empowers planners to interact with data in natural language, understand the drivers behind decisions and act with confidence.

ChatGPT and other large language model (LLM) systems allow everybody to interact intelligently with data. It is no longer acceptable for information to be available only in a static or analog form that doesn't reflect changes at the speed of the market.

The future of supply chain planning is intelligent, intuitive and inclusive. It speaks the language of business, adapts to the pace of change and empowers organizations to lead with insight. The window to build a competitive advantage is open—but not for long.



Request Your Digital Download





The Three Levels of Digital Planning Intelligence

Modern decision intelligence is built on three interconnected levels. Think of them as digital building blocks that progressively enhance forecast accuracy and responsiveness:

LEVEL 01

Mining Historical Data – Strategic Insights

Organizations operate within broader economic ecosystems. Historical data mining and narrow AI are used to analyze macroeconomic drivers like inflation, consumer behavior and industry trends. These insights support strategic planning and annual operating plans (AOPs), helping teams visualize scenarios and assess long-term risks and opportunities.

Gen AI enables users to run natural language queries—such as simulating a 10% inflation rise—and receive actionable insights on how to respond.

LEVEL 02

Demand Planning – The Operational Horizon

Spanning three to 18 months, this level addresses operational planning. It incorporates promotions, seasonal trends, competitive actions and external data sources. Advanced ensemble modeling engines combine multiple forecasting models and data streams into a single, robust prediction—reducing errors by 10–15% compared to traditional methods.

AI flags anomalies, requests clarification and learns from exceptions, enabling real-time collaboration across personas. Insights are immediately explainable and shared across departments, eliminating delays and improving responsiveness.

LEVEL 03

Demand Sensing – Translating Current Indicators

This forward-looking layer captures real-time data from customer orders, distributor stock, social sentiment and weather. It transforms the bullwhip effect into improved short-term forecasts—reducing errors by up to 30% and enhancing predictability across planning horizons.

Demand sensing reflects the voice of the customer and enables planners to respond to market changes as they happen, shifting focus from firefighting to strategic management.

Note: All statistics mentioned are the results achieved by Logility client implementations.

06

Fair by Design: The Business Case for Responsible AI

Every AI project your business undertakes creates new obligations. For employees whose performance data trains algorithms. For suppliers whose selection depends on automated scoring. For customers whose purchasing patterns inform pricing models. And for regulators drafting frameworks for accountability.

The ethical dimensions of AI have become as critical as the operational gains it delivers.

Yet trust remains elusive. Three in five people remain wary of AI systems, according to research from KPMG and the University of Queensland. 65% of business leaders believe ethical issues will severely impact their industry within three years, while 61% believe AI adoption is outpacing the development of ethical guidelines. In short, there's a gap between deployment speed and responsible implementation.

Ethics Should Drive Performance

There's a strong business case for ethical AI adoption. Biased algorithms distort hiring decisions, skew pricing models and create inconsistent customer experiences. These effects compound across supply chains, damaging relationships that took years to establish.

The competitive advantage favors those who act mindfully, incorporating ethical considerations into their development strategy. Half of business leaders now view responsible AI as a market differentiator, according to PWC research.

Companies implementing ethical AI practices report higher employee adoption rates, stronger customer relationships and reduced regulatory risk.

Three Critical Vulnerabilities in Your AI Strategy

Manufacturing environments face three distinct risks that threaten ethical AI adoption:

Biased training data emerges when historical patterns embed unfair preferences. If past hiring favored certain demographics or supplier selection privileged legacy partners, AI systems trained on this data will amplify these patterns across future decisions. Currently, 79% of organizations still lack bias mitigation policies.

Black box decision-making undermines adoption when teams cannot understand how AI reaches conclusions. Experienced operators, accustomed to relying on intuition and domain knowledge, hesitate to act on recommendations they cannot evaluate or verify.

Majority case optimization creates invisible inequality when AI systems optimize for high-volume scenarios while neglecting edge cases. For example, predictive maintenance models might prioritize major production lines while overlooking critical small-batch processes that require equally careful attention.

These three problems often stem from poor planning rather than inadequate technology. Addressing them requires systematic attention on how your AI systems are designed, trained and deployed.





Building Trust Through Design

Responsible AI implementation requires deliberate choices throughout the development process. There are four principles manufacturers can use to ensure ethics remain central to all your AI projects:

1. Diversify Data Sources

Draw from different products, production lines, facilities and user groups to surface potential biases before they are integrated into live systems. Algorithms trained on narrow datasets inevitably reflect those limitations. Broad representation in training data creates more robust and fair outcomes.

2. Include Operational Expertise

Cross-functional collaboration is essential for successful AI projects. When engineering teams include operations staff and frontline workers, those stakeholders identify problems that purely technical perspectives miss. A third (36%) of employees believe AI adoption rates will improve if staff are consulted during tool selection.

3. Ensure Explainability

Teams that understand why systems make specific choices can identify questionable decisions. This clarity builds confidence and enables informed oversight rather than blind trust. Transparency becomes a prerequisite for scale.

4. Monitor Continuously

Regular auditing prevents “ethical drift” over time. Bias can emerge gradually as data patterns shift or business context evolves. Pilot programs that measure both performance and fairness outcomes provide the iterative feedback you need to refine your AI models and maintain ethical standards.

Ethical AI Is a Competitive Advantage

To successfully deploy AI at scale, manufacturers must recognize ethical AI is not a compliance burden, but a business opportunity. The evidence is clear: Companies that build fair, transparent systems see higher adoption rates, stronger customer loyalty and reduced regulatory scrutiny.

Building fairly and democratically from the start could prevent you having to rebuild expensively further down the line.



Aviva's Tristan Harper on Implementing AI at Scale

Tristan Harper is principal data scientist at Aviva, one of the UK's largest insurers. He's spent 19 years helping Aviva to better serve over 20 million customers.

Leading Aviva's generative AI complaints delivery, he shares insights on overcoming AI implementation challenges, the critical importance of prompt engineering and why transparency with both staff and customers is essential for successful AI adoption.

How is Aviva using AI in your complaints management processes, and where do humans still play an essential role?

We're using AI to establish what complaints are about, create timelines and draft responses—but always with human review. AI processes the various data sources to extract key information, identify patterns and flag important elements like vulnerability indicators using keyword searches and natural language processing.

What AI doesn't do is replace human judgment. Our specialist teams still investigate whether complaints are justified, make nuanced decisions and provide the empathy that's crucial when customers are upset.

Aviva handles millions of customer interactions across multiple channels. What unique challenges does this present when implementing AI initiatives?

The sheer variety of data sources is both our biggest opportunity and our biggest challenge. Customers contact us through phone calls, live chat, emails and even physical letters. Each requires different processing—audio transcription for calls, optical character recognition (OCR) for scanned letters and text processing for emails and chats.

And we're not just dealing with volume but also complexity. A pension complaint might reference legislation from decades ago, while a motor insurance complaint needs completely different expertise. That's why we maintain specialized teams for each product area, with AI augmenting their deep knowledge rather than replacing it.

The key is creating a unified approach that works across all these channels while respecting the unique requirements of each product type and maintaining the human expertise that complex complaints often require.

How important is prompt engineering when you're developing AI applications?

Poor prompts lead to poor outputs, which means you miss critical information in complaints. Let me give you an example: Imagine a customer calls about a pension withdrawal delay, but during the conversation they also mention they need to change their address because they're going through a divorce.

If someone just prompts AI to summarize the call as briefly as possible, it might say: "Customer discussed four topics including pension access and address change." That completely misses the vulnerability indicator of divorce.

But with a well-engineered prompt that specifically asks to identify customer intent, areas of dissatisfaction and vulnerability markers with a timeline and bulleted action points, you get an output that captures everything a complaints handler needs to properly manage that customer relationship.

As a company leading the use of AI in the insurance industry, what guidance would you give to other organizations whose strategy is less developed?

First, don't underestimate the human element. Technology is the easy part; getting your people on board is where many AI initiatives fail. Be transparent about your intentions and show staff how AI helps them do their jobs better and that it doesn't threaten their livelihoods.

Second, invest heavily in prompt engineering and standardization. The difference between a basic prompt and a well-engineered one is the difference between useful insights and expensive noise.

Third, learn from others, but move at your own pace. Banks blazed the trail for AI in customer service, but they encountered issues like chatbots that could be manipulated into saying inappropriate things. Learn from their mistakes while building something that fits your organization's needs and risk appetite.

Finally, remember that in regulated industries, transparency isn't just nice to have, it's mandatory. Build compliance into your AI strategy from the start, not as an afterthought. Your customers and regulators will thank you for it.

*This interview is an excerpt from Apteian's new eBook, **Expert Insights on Using AI to Manage Customer Complaints**. Use the QR code below to download your copy.*



08

What Does It Mean To Be an AI-First Company?

When Aptean began discussing what it means to be “AI-first,” the conversation quickly moved beyond technology implementation to a more fundamental question: How does artificial intelligence change the way executives make decisions, allocate resources and interact with customers?

To dive deeper into this consideration, we asked members of our leadership team to explain what being an AI-first company means to them. Here’s what they told us:

Bob Kocis, President and Chief Operating Officer

Being AI-first means:

Making adoption approachable

“I encourage everybody to do one thing today with AI. It can seem daunting, it can seem overwhelming, but it’s actually not. If you engage one step at a time, each thing you do will get you better and more embedded, and it will eventually become part of your daily life.”



Miguel Gernaey, Chief Marketing Officer

Being AI-first means:

Making AI part of everything we do

“It’s hard to imagine now doing something or having to write something without first asking AI to write it for you and then edit it. We heavily use AI for delivering better digital experiences and getting deeper buyer insights. There’s really heavy application of AI within marketing already, but I believe we still need to go further.”





Jeremy Wardell, General Manager, CE Products

Being AI-first means:
Recognizing the urgency of adoption

“The power of AI is accelerating at a pace that I don’t think we’ve seen before in terms of technology. It’s not a case of customers not adopting now and thinking they can put it off for two or three years, because at the pace that AI is accelerating, that’s like putting it off for 10 or 15 years.”



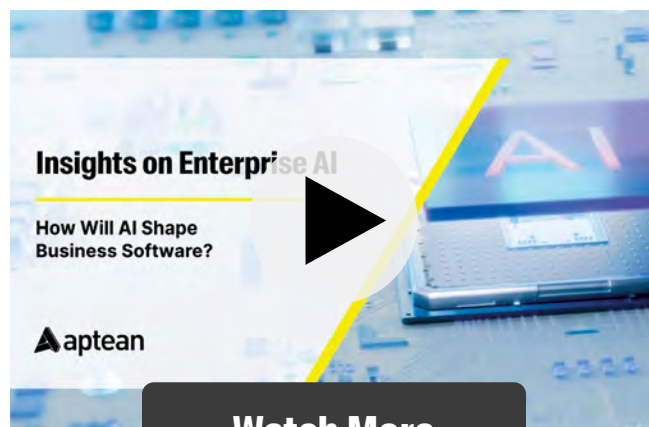
Sean Nappo, Executive Vice President, Americas

Being AI-first means:
Accelerating decision making

“In the past, it was hard to get the data that you needed to make decisions. With AI, I’m able to pull data extremely fast, and I can see how we’re doing and what kind of pivots we need to make.”

Organizations that embrace AI as a core business philosophy, rather than as a tool, will shape the future. For Apteian, these perspectives reveal that being AI-first isn’t about the technology itself—it’s about changing how work gets done.

Watch More Interviews



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YouTube Playlist

09

Five Areas To Apply AI in **Your Food and Beverage Operation**

97% of North American food and beverage companies are **exploring or implementing an artificial intelligence** strategy. Yet many organizations are still unsure how to harness its full potential.





New research by Aptean has identified **five key areas where manufacturers can successfully apply AI** to drive tangible business improvements:

01

Data Analysis

AI's advanced analytics capabilities help food and beverage manufacturers identify market trends and make data-driven decisions with greater accuracy and speed.

02

Supply Chain and Logistics

From production planning to inventory management and quality control, AI is enhancing how manufacturers manage supply chain operations and ensure product consistency.

03

Performance Optimization

AI-powered systems help improve production efficiency, increase data accuracy and reduce errors across manufacturing facilities.

04

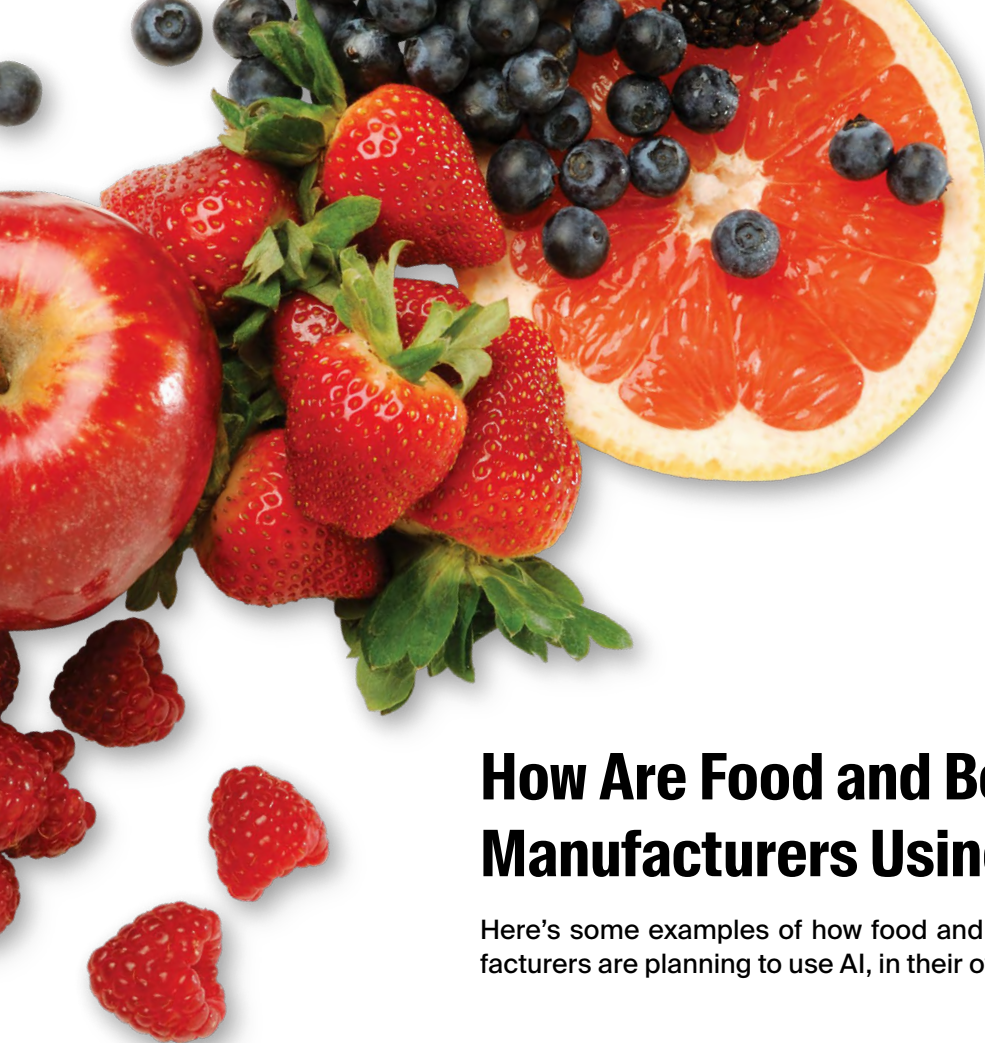
Customer Satisfaction

Food and beverage manufacturers are leveraging AI to deliver personalized experiences by analyzing customer feedback and developing products that better meet market demands.

05

Workplace Management

AI streamlines workforce scheduling, automates administrative tasks and provides data-driven insights for better training programs and team performance.



How Are Food and Beverage Manufacturers Using AI?

Here's some examples of how food and beverage manufacturers are planning to use AI, in their own words:

"AI's demand forecasting capabilities will help us more accurately predict market demand, optimize inventory management, reduce inventory backlogs and ensure the smoothness of the supply chain."

U.S.-based dairy products manufacturer, \$100M+ revenue

"AI automates repetitive tasks such as data entry, document processing and financial report generation to reduce manual errors and improve efficiency."

Canadian flavoring and sauces manufacturer, \$100M+ revenue

"We're using artificial intelligence for accurate predictions to determine the next trend."

U.S.-based agricultural products company, \$20M-\$99M revenue



AI-Powered Innovation: Aptean Food & Beverage ERP on AppCentral

Our award-winning, industry-specific food ERP is now even better that it's on AppCentral, the AI-powered platform with preconnected solutions that streamlines end-to-end operations.

That means Aptean Food & Beverage ERP customers now have these robust AI functionalities:

GenAI Query

Get instant, plain-language answers about your operations or drill into detailed, real-time reports—everything you need, right when you need it.

Agentic Workflow

Automate and connect workflows across departments, freeing your team to focus on the high-value, strategic work that fuels growth.

Personalized Workspaces

Equip every user with a role-specific command center that unites data, apps, and AI assistants to maximize performance.

Intelligent Prediction

Spot trends and risks early with predictive AI agents, empowering you to make proactive, confident decisions.

Task Agents

Let AI handle routine tasks like quoting, order processing, and inventory tracking, so your team can concentrate on bigger priorities.

Coming Up in Our Next Issue

**2026 predictions:
What's next for AI in
manufacturing**



**Workforce in transition:
How AI is reshaping
jobs and skills**



**Getting your
infrastructure AI-ready**

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Got Something To Say About AI?

Email marketing@aptean.com
and you could be featured in the
next issue of *The Algorithm*

About Aptean

Aptean is a global provider of industry-specific software that helps manufacturers and distributors effectively run and grow their businesses. Aptean's solutions and services help businesses of all sizes to be Ready for What's Next, Now®. Aptean is headquartered in Alpharetta, Georgia and has offices in North America, Europe and Asia-Pacific.

To learn more about Aptean and the markets we serve, visit www.aptean.com.

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