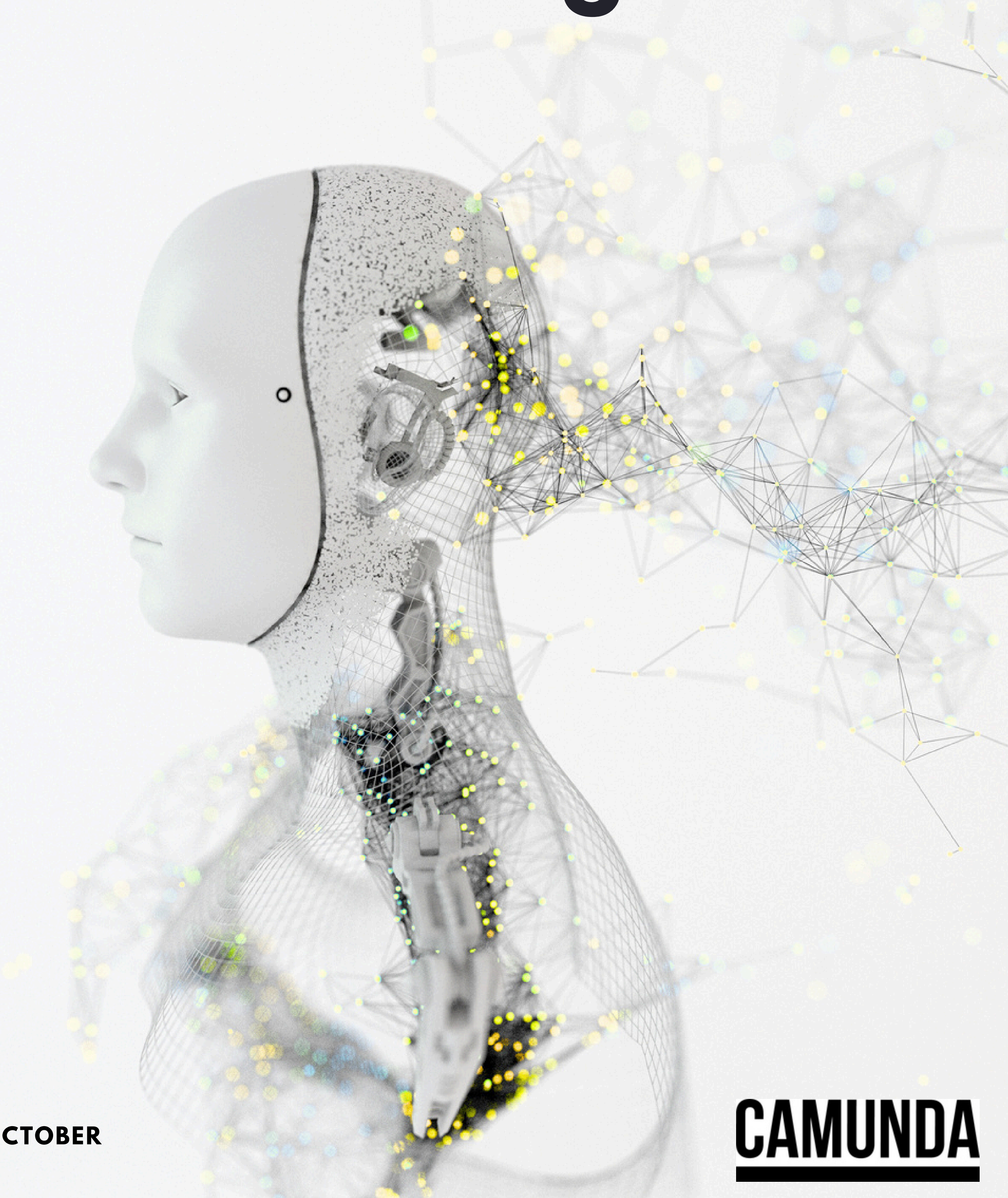
BOARDROOM

# AI: The Agents of Change



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# THE DISCUSSION TOPIC

**“Making the most of technology demands exercising new strategic muscles.” (Deloitte 2025)**

In an era defined by disruption, complexity and relentless change, over 80% of FS&I organizations have turned to AI for a competitive edge (McKinsey 2025). And yet, the next wave of innovation to supercharge operational agility and create new revenue opportunities is already here: Agentic AI.

But reality bites. 90% of AI use cases haven’t even made it out of pilot stage (McKinsey 2025). A clear disconnect. So, what will be different this time? To scale the impact of AI, firms must transform scattered initiatives to strategic programs whilst juggling the concerns around risk, cultural buy-in and AI skepticism.

The Boardroom Club, alongside a vetted group of senior executives discussed the low risk, high impact use cases of agentic AI, the practical strategies for its integration and the psychology behind gaining boardroom buy in.

**CONTENTS**



## Contributors

The contributors to this report are senior executives within FS&I large scale organisations. With compelling insights from these industry leaders, this report is a compass for organisations aiming to navigate and drive forward in their AI strategy.

This report identifies the key priorities, strategies, challenges and solutions of this ongoing debate.

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# AI: The Agents of Change

## From Pilots to Programmes

*"The true challenge lies in getting use cases to move beyond pilot" Roundtable Participant*

To realise AI's true value, organisations must shift from fragmented experimentation to integrated, strategic deployment. There is a common pain amoung executives: too many AI pilots, too little impact. Projects remain siloed, often led by innovation teams or isolated business units, and rarely scaled across the enterprise. The complexity of coordination, legacy technology, and risk-averse culture keep AI stuck in pilot. Roundtable participants agreed that turning AI into an engine of change demands strategic prioritisation, programme-level thinking, and executive ownership. Without it, organisations risk scattered wins with no sustainable value.

### Actionable Solutions

*"Unless AI becomes part of how we think about business transformation, it'll stay in the innovation lab." Roundtable Participant*

***Treat AI as a capability, not a project*:** Frame AI as a long-term enterprise capability that needs governance, resourcing, and leadership, just like finance or risk. Move beyond isolated use cases and build cross-functional programmes with clear roadmaps and ownership.

***Build a repeatable deployment model*:** Establish a playbook for taking use cases from idea to production. Include risk reviews, performance metrics, and change enablement to speed up scale and reduce friction.

**Align AI to business strategy, not just curiosity:** Ensure every AI initiative maps to strategic outcomes, efficiency, growth, compliance, or customer experience. If the use case isn't solving a core problem, it's not ready for investment.

### Questions to Consider:

- *Which of our AI initiatives are ready to graduate from pilot to programme?*
- *Do we have a consistent process to scale success across the organisation?*

## The Rise of Agentic AI

*"AI agents are the pathway to true value from AI, but most importantly, at scale." Roundtable Participant*

Agentic AI has the potential to revolutionise decision-making and automation, but only if firms get the fundamentals right.

Unlike traditional models or chatbots, agents can initiate tasks, monitor outcomes, and adjust course autonomously. Our executives saw huge potential for streamlining operations, augmenting decision-making, and reducing manual workload. But many warned that jumping to agents without process clarity, governance, or guardrails would amplify existing risks. Trust in the underlying system, data, rules, and monitoring, must come first.

### Actionable Solutions

*"We need to build systems where agents can act, but not act alone." Roundtable Participant*

***Start with low-risk agent use cases*:** Identify areas where agents can operate with minimal regulatory exposure, internal operations, reconciliations, or routing tasks, before expanding into customer-facing or decision-critical zones.

***Design processes for AI, not humans*:** Reimagine workflows to support autonomous systems: clear triggers, defined logic, measurable outcomes. Agentic AI works best in environments built for machine-led action.

***Create real-time oversight and control*:** Use orchestration platforms, monitoring dashboards, and escalation paths to supervise agents and keep humans in the loop. Don't assume autonomy means letting go, it means setting boundaries.

### Questions to Consider:

- *Which business areas are most ready for autonomous agents today?*
- *How are we designing oversight into our AI systems?*

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# *AI: The Agents of Change*

## Trust is the Hardest Variable

*"Tech is not the biggest blocker, it's trust in our culture." Roundtable Participant*

Without cultural trust among employees, leaders, and customers, AI adoption will stall regardless of technological readiness.

Trust is not a "nice to have" in AI, it's everything. And it's in short supply. Boards worry about risk and compliance. Employees fear replacement. Customers fear opacity. Some attendees shared stories of successful technical deployments that were rejected by business users due to mistrust or misunderstanding. The challenge is not just explainability, it's emotional and organisational. Leaders must build confidence through communication, transparency, and early wins.

### Actionable Solutions

*"Even if the tech works, if the business does'nt trust it, they will turn it off." Roundtable Participant*

***Demystify AI for every audience:*** Tailor education and communication to different stakeholders. Boards need strategic clarity. Employees need practical relevance. Customers need clear boundaries and benefits.

***Involve users early and often:*** Build trust through co-creation. Bring frontline teams into the design, testing, and iteration phases so they become advocates, not sceptics.

***Use governance to build, not block, trust:*** Strong oversight builds confidence. Show how AI is being managed responsibly, with auditability, human-in-the-loop controls, and risk reviews.

### Questions to Consider:

- *Who in our organisation still sees AI as a black box, and why?*
- *How are we using governance to increase confidence, not slow progress?*

## Boards Need a New Language

*"The board wants the upside, but they don't see the path." Roundtable Participant*

AI transformation needs better storytelling at the top, boards don't need the tech spec, they need the business case.

Executives voiced frustration at the gap between technical teams and decision-makers. While interest in AI is high at the board level, understanding is not. Many projects fail to get investment because the business case is unclear or the perceived risk outweighs potential reward. Participants called for a more strategic narrative, one that links AI to outcomes boards care about: cost, risk, growth, and customer experience. Boards don't need to understand the model, they need to understand the impact.

### Actionable Solutions

*"The way we pitch AI is still too technical, it doesn't land." Roundtable Participant*

***Frame AI in board-level language:*** Skip the model architecture, focus on outcomes. Use real-world examples to show how AI drives KPIs, strengthens controls, or enables revenue.

***Tie metrics to strategic intent:*** Start with the problem being solved: customer satisfaction, cost reduction, risk mitigation, etc. Define KPIs that reflect impact in that domain—then use technical metrics (e.g. model accuracy, latency) as supporting evidence, not the headline.

***Use pilots to tell stories, not just show data:*** Capture lessons, challenges, and user experiences from early use cases to create compelling board narratives. Storytelling builds belief.

### Questions to Consider:

- *How are we making AI relevant and tangible to non-technical stakeholders?*
- *Is ROI holding us back and reducing our appetite for risk and experimentation?*

## A Decision Framework for AI Investment

*"The tech is external, but the change has to be internal." Roundtable Participant*

AI success relies on ownership, investment and change, you can build tools with vendors, but the transformation must come from within.

The conversation made it clear: AI isn't plug-and-play. Many firms are still overly reliant on the technology for AI delivery, often without clear internal capability, change ownership, or long-term strategy. While finding the right technology and vendors is crucial, true impact requires investment in internal skills, strong cross-functional collaboration, and leadership that's willing to lead uncomfortable change

### Actionable Solutions

*"If your vendor owns the roadmap, it's not your transformation." Roundtable Participant*

***Use a build-vs-buy matrix:*** Assess each use case across four dimensions: speed to value, strategic differentiation, internal capability, and risk exposure. Use this to guide whether to build, buy, or partner.

***Upskill for long-term success:*** Invest in data literacy, process design, and AI fluency across the business. Empower teams to ask better questions and engage confidently with technology.

***Use vendors to accelerate:*** Work with partners tactically for speed, tooling, and expertise, but retain control of the strategy, integration, and impact measurement.

### Questions to Consider:

- *Do we have the internal capability to lead AI change, or are we outsourcing transformation?*
- *Where should we build vs. buy to ensure control and sustainability?*

## Conclusion

This roundtable reinforced a simple but urgent truth, AI isn't just a tool, it's a test of enterprise change readiness. While the emergence of agentic AI offers fresh promise, the reality for most firms remains the same. AI projects are still trapped in pilot mode, blocked by legacy processes, siloed teams, and a lack of strategic integration. The challenge isn't the technology, it's the ability to orchestrate it at scale.

Our roundtable executives agreed that the next chapter of AI demands something different. Not just new tools, but new behaviours. Success hinges on building trust, redesigning processes, and creating governance structures that enable, not constrain, autonomous systems. That means demystifying AI for sceptical users, shifting how boards hear the story, and accepting that meaningful change can't be outsourced. AI isn't a bolt-on solution, it's a business transformation, and it needs to be led as such.

Yet there is optimism, too. Executives are energised by the potential of agentic AI to accelerate operations, improve resilience, and unlock new ways of working. The message was clear, progress will come to those who stop waiting for perfect conditions and start building intelligent systems today, with the right leadership, structure, and intent. The winners won't be those with the flashiest models, but those who make AI feel real, scalable, and trustworthy across the organisation.

# AI: THE AGENTS OF CHANGE

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The Boardroom Club is an exclusive network of senior business leaders who want to drive change within the complex and evolving world of large organisations. By surfacing the right topic at the right time with the right question, we create the right conversation to deliver the right answer. In doing so, we help our members be a catalyst for change and a true leader within their organisation.

https://www.theboardroom.club/the-club

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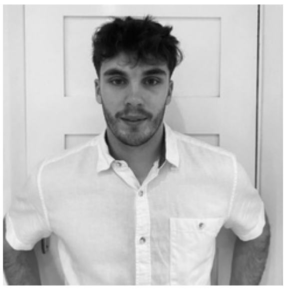

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CAMUNDA

Camunda is the leader in enterprise agentic automation, orchestrating complex business processes, including high-value knowledge work, across agents, people, and systems. By creating production-ready, enterprise-grade agents with built-in governance, Camunda uniquely delivers trusted AI agents for business-critical processes. Over 700 leading innovators like Atlassian, ING, and Vodafone, rely on Camunda to slash time-to-value from months to days, boost operational efficiency, and elevate customer experiences.

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