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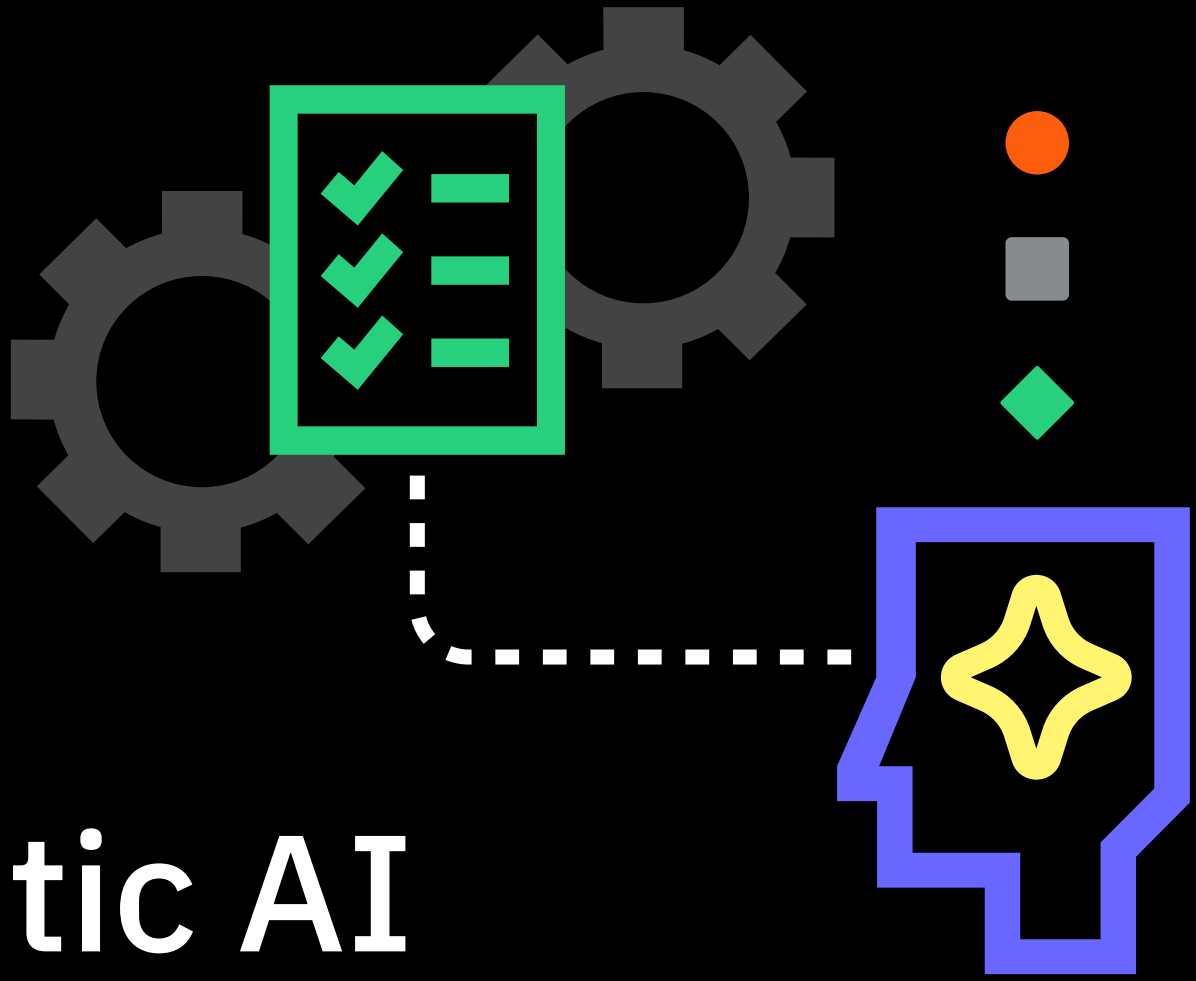

Your Agentic AI Action Plan

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Your Agentic AI Action Plan

Now that you have a good understanding of how prepared your organization is to operationalize AI, and can see a path forward to true readiness, the question becomes: what do we need to do to move along that path?

To answer that question, we've put together this action plan, focusing on the tangible skills, technologies, and strategies that organizations should develop to support their ability to solve problems and achieve business goals through operationalizing AI.

At Camunda, we believe that a robust process orchestration and automation practice is foundational to developing the capabilities needed to truly operationalize agents and other AI technologies. That's why for this roadmap, we've aligned our readiness levels to individual transformation stages, and identified the specific ways that process orchestration and agentic orchestration make organizations more capable of using AI effectively. While we focus on this roadmap on orchestration, we also highlight some key investment opportunities to advance your teams, employee skills, and organizational alignment to help move to a higher stage of AI readiness.

To start, let's look at the AI Readiness levels, and the transformation stages that help organizations move onward:

Your AI Readiness Level	To Advance, you need to: (Transformation Stage)	How Orchestration Helps You Move Forward
Level 1: **Ad Hoc and Isolated**	**Discover & Align**	Validate the need for orchestration. Use models to surface gaps and opportunities in real processes.
Level 2: **Defined and Piloting**	**Design for Impact**	Co-create workflows that integrate AI touchpoints. Define when humans vs machines act. Pilot orchestrated AI flows with traceability, fallback, and metrics.
Level 3: **Governed and Scalable**	**Build & Scale with Control**	Reuse, adapt, and enforce governance. Track success. Avoid AI and process sprawl.
Level 4: **Intelligent and Adaptive**	**Run & Evolve**	Use telemetry and orchestration insights to optimize over time. Adapt AI strategies with confidence.

Stage 1:
Discover & Align

What's Happening

Business and tech leaders begin identifying pain points and opportunities for AI. Conversations shift from "what can GenAI do?" to "where can it make a real difference?" But alignment is patchy. Teams need a shared understanding of what "good AI" looks like — and how it fits into existing operations.

Role of Orchestration

- Provide a modeling environment to visualize current-state and future-state processes
- Map out where AI could participate (e.g., decision steps, content generation, triage logic)
- Run low-risk simulations and prototypes to build buy-in

Orchestration Priorities

- Create transparency around where AI might be introduced
- Start capturing workflows — even if not yet automated
- Engage both business and technical stakeholders using shared models

Success Signals

- Target use cases identified and prioritized
- Alignment on value drivers and risk areas
- Process-AI handoff points visualized

Stage 1:

Discover & Align

Other Drivers to Consider

- **Vision:** We've already discussed how orchestration can help identify high-impact technical use cases that can benefit from AI integration. In connection with this work, leadership should also examine and target high-value, high impact business use cases to prioritize. Quick wins are important, but high-impact changes are the ones that last and drive meaningful transformation.
- **People:** Along with your critical, high-friction, high-value use cases, assess your internal AI capabilities and maturity, especially for the business users who will be involved in the transformation process or in the day-to-day use of the AI-enhanced process. Start this upskilling process early to ensure success after implementation.
- **Measurement:** To prove the transformational aspect of AI-supported processes, you'll need to have identified your processes' baseline performance metrics, and have an accurate picture of how the current process works and is measured to establish a comparison point.

Stage 2:
Design for Impact

What's Happening

Teams move from curiosity to commitment. Initial use cases are selected, and process designs are updated to incorporate AI-powered decisions or content. Guardrails, escalation paths, and fallback logic must be designed from the start.

Role of Orchestration

- Co-design workflows with AI touchpoints, including human-in-the-loop review
- Integrate AI capabilities (e.g., LLMs, classifiers) into executable BPMN/DMN models
- Enforce versioning and observability for prompts, models, and thresholds

Orchestration Priorities

- Establish reusable modeling patterns (e.g., AI decision with confidence check → manual approval)
- Define governance rules in executable logic
- Use Camunda's open APIs to embed early AI services

Success Signals

- Process diagrams include AI steps
- Prompts or models mapped to process outcomes
- Teams aligned on escalation criteria and ethical guardrails

Stage 2:

Design for Impact

Other Drivers to Consider

- **Vision:** This is the time to incorporate the lean business practice of value stream management (VSM) to identify, measure, and optimize the flow of value from ideation to customer delivery within your selected use cases. When applied to AI adoption, VSM provides essential business context for technology decisions.
- **People:** When designing the new, AI-enhanced processes, be sure to consider the “human-agent ratio”—the balance between human oversight and agent efficiency that maximizes performance on both sides of the equation. You don’t want to leave projects unsupported with human or agentic resources, but you also don’t want to overwhelm your human employees’ capacity to apply human judgement in the process.
- **Measurement:** Now is the time to establish quantifiable success metrics for AI implementation. The goal is not just to decrease friction in the established process/use case, but to deliver meaningful business results through that friction reduction.

Stage 3:
Build & Scale with Control

What's Happening

AI models and orchestration logic are implemented, integrated, and tested, while validated AI patterns are rolled out to additional domains, products, or geographies. Security, privacy, and observability are crucial — no black boxes allowed. Teams face scale pressure — and must avoid process chaos, model duplication, or governance gaps. Orchestration becomes the backbone of reuse and compliance. Most orchestration tools force a trade-off at this juncture, where deterministic process orchestration support limits the ability to support dynamic processes. Camunda supports both deterministic and dynamic process orchestration in one model.

Role of Orchestration

- Orchestrate the entire lifecycle: trigger → AI call → output evaluation → next step, with logs, audit trails, and business context for every AI-influenced decision
- Enable pattern reuse (e.g., claims triage with GenAI, account opening with fraud score)
- Embed organizational policies as executable logic (e.g., GDPR steps, approval paths

Orchestration Priorities

- Ensure every AI interaction is observable, explainable, and reversible
- Build resilience into workflows (timeouts, retries, fallbacks)
- Create process templates with pluggable AI components, and automate change tracking and model-to-process dependencies

Success Signals

- Multiple departments use shared orchestration logic
- Time-to-deploy new AI-powered workflows drops significantly
- Compliance teams trust the visibility and audit logs

Stage 3:

Build & Scale with Control

Other Drivers to Consider

- **Vision:** Implement AI solutions with clear metrics for value stream performance and ensure ongoing communication between technical teams and value stream owners. Additionally, identify and address any barriers to adoption, particularly when it comes to process design. Incorporating AI into a broken process will only deliver bad results faster, so ensure that technical teams and business users are aligned and collaborating on the process design and implementation.
- **People:** Support teams through process changes with training and communication. Identify upskill and reskill opportunities and offer resources to support these transitions and to assuage discomfort and assumptions about AI use and its potential impact on human workers.
- **Measurement:** Check in on and address data quality and integration requirements. AI's access to and interactions with data is one of the largest causes for concern - and hesitation - in incorporating AI and agents into critical, value-delivering business processes. Minimize those concerns with transparency and vigilance aided by orchestration.

Stage 4:
Run & Evolve

What's Happening

AI and process orchestration operate as part of a continuously evolving system. Insights from telemetry, user feedback, and model performance feed back into the orchestration layer. Teams learn and optimize in near real-time.

Role of Orchestration

- Power continuous feedback loops: what worked, what failed, what needs retraining
- Orchestrate proactive actions: retrain, escalate, reassign
- Serve as a living system-of-record for AI + process interactions

Orchestration Priorities

- Close the loop: use data from orchestration to improve both process and AI
- Empower business users to suggest changes through models — not tickets
- Build infrastructure to support safe experimentation and rollback

Success Signals

- AI agents can autonomously trigger workflows within defined constraints
- Processes adapt to new signals (e.g., customer behavior, risk score changes)
- Strategy and operations are aligned through orchestrated telemetry

Stage 4:
Run & Evolve

Other Drivers to Consider

- **Vision:** Building a truly AI-ready enterprise is not a one-and-done exercise. It requires an analysis of actual value delivery data, followed by a refined AI strategy based on lessons learned to scale successful implementations to additional value streams and use cases.
- **People:** Gather stakeholder feedback on process changes. Your business users helped collaborate during the design and development of your AI-enhanced processes, but now that they're interacting and driving these processes in the real-world, check in with them. Is their lived reality matching their expectations?
- **Measurement:** Measure improvements in value stream metrics post-AI implementation, and identify unexpected consequences or new bottlenecks. Comparing actual metrics to projected benchmarks and evaluating unexpected outcomes allows to refine the AI models, adjust the business process, or identify the next use case in complex workflows, further operationalizing AI for maximum business impact.

Use Case Patterns: AI + Orchestration

Here are four high-impact patterns where AI and Camunda complement each other:

KYC Decisioning

Automate document verification, fraud scoring, and escalation — while keeping human-in-the-loop where needed.

Insurance Claims

Integrate document AI, damage assessment models, and routing logic for faster, safer claims processing.

GenAI Assistants

Orchestrate LLM agents across customer service, marketing, or operations — with guardrails and context windows.

Hyperpersonalized Journeys

Detect customer intent and orchestrate experiences across systems using AI signals and event streams..

Conclusion & Next Steps

Camunda helps organizations scale the right kind of AI: visible, governable, and aligned with real business value. This model gives a clear path forward through the AI Readiness Roadmap — from exploration to intelligent operations. It supports everyone: from architects seeking consistency, to developers building fast, to leaders aligning on outcomes. With this plan, organizations can truly operationalize AI in their processes to drive meaningful business outcomes.

Ready to get started?

- Start by mapping your current level.
- Identify blockers across the five readiness drivers.
- Use orchestration to scale what works — and govern what must.

Let’s orchestrate the future. **Together.**

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About 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. Ready to become an AI-first enterprise?

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