Agentic Planning: The Future of Enterprise Decision-Making

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1. Executive Summary

Planning has long been central to how organizations set priorities, allocate resources, and respond to change. Yet in today's environment of constant disruption and accelerating complexity, traditional planning approaches are increasingly misaligned with how modern enterprises operate.

For years, connected planning provided a way forward. By linking finance, operations, sales, and HR onto shared platforms, it broke down silos and enabled cross-functional alignment. But connected planning, while more agile than previous models, is still largely human-driven, dependent on predefined workflows, manual updates, and centralized execution.

Now, enterprise planning is entering a new phase, one defined by autonomy, adaptability, and continuous orchestration.

We call this next evolution **Agentic Planning**.

It introduces autonomous AI agents that actively participate in the planning process. These agents continuously scan systems, simulate potential outcomes, and make proactive recommendations across business functions. Their purpose is not to replace humans but to extend their reach, reduce decision latency, and allow leadership to focus on strategy rather than execution.

This whitepaper explores the evolution from *connected* to *agentic* planning. It defines the agentic model, outlines how it works, and presents the implications for organizations aiming to stay competitive in a rapidly changing world.

By enabling planning that is adaptive, continuous, and context-aware, Agentic Planning offers not just a toolset, but a fundamentally new operating model for enterprise decision-making.

2. Understanding the Shift

For decades, enterprise planning followed a familiar rhythm: annual budgeting, quarterly forecasts, and a reliance on spreadsheets to stitch it all together. This was the era of **traditional planning**: predictable, but rigid. Departments operated in silos. Planning cycles were long. Adjustments were slow.

As organizations digitized and data volumes grew, the limitations of traditional methods became harder to ignore. In response, **connected planning** emerged. By integrating planning functions across finance, operations, and business units, organizations could align forecasts, improve visibility, and collaborate across functions in real time. Platforms like enterprise performance management systems became the backbone of this approach.

Yet even with greater integration, a core challenge remains: speed. Planning in today's environment must contend with shocks that unfold over days, not quarters, such as economic volatility, supply chain disruptions, geopolitical risk, and shifting customer demand. The friction between real-time business dynamics and periodic planning cycles is growing.

Agentic Planning addresses this gap. It builds on the foundation of connected planning but moves beyond human-triggered processes. In this new paradigm, AI agents act on behalf of planning teams, operating continuously, adapting to change, and interacting with systems and stakeholders as needed.

Where connected planning unified processes, Agentic Planning introduces **intelligence**: always-on, self-learning, and embedded into daily operations.

3. What Is Agentic Planning?

Agentic Planning is the new approach to enterprise planning in which autonomous AI agents manage, optimize, and execute planning tasks based on strategic direction set by humans.

These agents are software-based entities designed to perform specific planning functions. They can:

- Monitor key business drivers and performance indicators in real time
- Simulate multiple future scenarios and assess the implications of various decisions
- Recommend adjustments to forecasts, budgets, or operational plans
- Interact with users through natural language or system interfaces

Importantly, Agentic Planning does not remove humans from the equation. Rather, it redefines the human role. In this model:

- Humans **set intent**, clarifying goals, constraints, and acceptable trade-offs.
- Agents **execute**, handling data ingestion, analysis, simulation, and recommendation.

Decision-making becomes a **collaborative process**, where humans apply judgment and agents provide optionality.

The shift has significant implications for enterprise planning:

- The emphasis on technical EPM skills (modeling, scripting, tool configuration) diminishes.
- The importance of **enterprise fluency** (understanding how the business operates, what drives value, and where levers can be pulled) grows.

Agentic Planning enables broader participation in planning by reducing technical barriers. It accelerates feedback loops and increases agility by embedding intelligence into planning systems. And it empowers organizations to respond more effectively to the complexity that defines modern business environments.

This is not a hypothetical future. Many organizations are already experimenting with agent-like capabilities, whether through natural language interfaces, automated

scenario modeling, or AI-enhanced forecasting. Agentic Planning simply makes these capabilities systemic, coordinated, and central to how planning gets done.

4. How Agentic Planning Works

Agentic Planning introduces a structural shift in how enterprise planning is executed. Rather than relying on fixed workflows, predefined models, and manual data consolidation, this new paradigm is built on a dynamic system of autonomous AI agents operating within a coordinated planning architecture.

4.1. A New Operating Model for Planning

At the heart of Agentic Planning is a **three-layer system**:

1. **Intent Layer (Human-Centered):** This is where strategic direction is set. Executives, business planners, and domain leaders articulate goals, priorities, constraints, and desired outcomes. Inputs may take the form of natural language prompts, structured plans, or mission statements.

   Crucially, this layer defines **"what matters"**, not **"how to do it."** It shifts human effort from technical execution to enterprise understanding and strategic guidance.

2. **Agent Layer (Autonomous Orchestration):** This is the core engine of Agentic Planning. AI agents are deployed across planning domains: sales, supply chain, finance, workforce, and operations. These agents:
   - Monitor internal systems (ERP, CRM, HCM, EPM)
   - Parse external signals (market trends, economic data, competitor behavior)
   - Simulate multiple future scenarios
   - Surface risks and opportunities
   - Recommend or initiate planning actions

   Agents do not operate in isolation. They communicate, negotiate, and coordinate with other agents to align local decisions (e.g., headcount planning) with enterprise-level objectives (e.g., margin improvement or market entry).

3. **Execution Layer (Connected Systems & Infrastructure):** This layer includes existing enterprise systems: EPM, ERP, CRM, data warehouses, BI tools. These tools remain vital, but their role shifts. Instead of being the primary interface, they become execution endpoints that agents tap into.

For example, an agent might initiate a forecast update in the EPM system or pull the latest inventory data from the supply chain system. This execution layer must be composable, interoperable, and API-accessible to support agent actions.

4.2. How the System Operates in Practice

Let's consider an example:

- The **Intent Layer** sets a strategic priority: "Protect margins while expanding into two new markets."
- A **Scenario Agent** begins simulating multiple pathways using current cost structures, competitor pricing, and currency fluctuations.
- A **Workforce Agent** identifies potential talent gaps in the expansion markets, weighing contract vs. permanent staffing options.
- A **Finance Agent** updates capital allocation models and flags cash flow risks based on scenario stress tests.

All this happens while human planners review agent-generated narratives and provide directional feedback.

The entire loop may take minutes, not weeks.

4.3. The Role of Large Language Models

While not required, large language models (LLMs) like GPT serve as a powerful enabler. They allow agents to:

- Parse unstructured business documents (board slides, earnings reports).
- Interact with planners using natural language.
- Generate readable narratives to explain forecasts, scenarios, or decisions.

LLMs make Agentic Planning not only powerful, but accessible.

4.4. From Orchestration to Autonomy

Over time, as agents accumulate feedback and learn from outcomes, the system becomes increasingly autonomous. This doesn't mean it operates without oversight, rather it means the system becomes faster, more proactive, and better aligned to enterprise objectives with each cycle.

Planning evolves from a slow, manual, centralized process to a distributed, intelligent, and continuously adapting system.

5. What Agentic Planning Enables

Agentic Planning is not merely a technological upgrade, but a strategic shift in how enterprises operate. By embedding intelligence and autonomy into the core of planning activities, it unlocks a wide range of capabilities that go beyond the limits of human-managed workflows or traditional systems.

Here's what it enables in practice:

5.1. Continuous, Real-Time Planning

Traditional planning operates in cycles: annual budgets, quarterly forecasts, monthly updates. Agentic Planning shifts this entirely.

Agents work continuously. They ingest data in real time, scan for deviations, simulate implications, and update plans without needing to wait for the next cycle. This enables:

- Instant response to supply chain shocks or demand spikes
- Ongoing scenario testing to reflect external volatility
- Dynamic reallocation of resources in response to new constraints

Outcome: Planning becomes fluid and responsive, closer to how the business actually operates.

5.2. More Scenarios, Less Guesswork

Human teams can model a few scenarios per cycle. Agents can model hundreds per hour.

With access to large datasets and high-speed compute, planning agents can:

- Stress test plans under varying inflation, pricing, or interest rate assumptions
- Evaluate downstream effects across functions (e.g., how a pricing change affects hiring)
- Apply Monte Carlo or probabilistic models without manual setup

Outcome: Leaders don't have to guess. They can compare options with clarity.

5.3. Democratization of Insight

In the past, planning insights were often gated by technical knowledge. If you didn't know how to write a formula, navigate an EPM tool, or run a report, your ability to influence decisions was limited.

In Agentic Planning, natural language becomes the interface. Agents surface insights proactively and communicate in plain terms. This means:

- More people can interact with planning systems directly
- Business users can ask questions and get meaningful, context-aware answers
- Decision-makers no longer need intermediaries to access insight

Outcome: Insight becomes a shared asset, not a specialized function.

5.4. Alignment Without Bottlenecks

In connected planning systems, cross-functional alignment is a human coordination challenge. Agentic systems reduce the friction by embedding alignment logic into agent interactions.

Agents don't just optimize for their own domain, they negotiate with each other. For example:

- A workforce planning agent may defer a hiring push if a finance agent flags capital constraints.
- A sales planning agent may suggest shifting quotas if a supply chain agent detects fulfillment issues.

Outcome: Trade-offs are surfaced early, and conflicts are managed automatically before reaching humans.

5.5. Reduced Cognitive Load on Leaders

In traditional systems, planning leaders spend significant time gathering, cleaning, and aligning data just to create a baseline. That overhead prevents them from focusing on strategy.

In Agentic Planning, agents handle the assembly, context-switching, and analysis. Leaders are free to:

- Evaluate high-quality recommendations
- Focus on prioritization and risk tolerance
- Iterate faster with less rework

Outcome: Leaders do less searching and more steering.

In short, Agentic Planning transforms planning from a toolset into a capability: one that operates continuously, at scale, across the enterprise, without putting more burden on the people meant to lead it.

6. The Human Role in an Agentic World

As planning becomes more autonomous, it's easy to assume the role of the human planner will diminish. The opposite is true.

In Agentic Planning, the human role doesn't disappear, it evolves. The value of technical skills declines. The value of judgment, intent-setting, and enterprise fluency increases dramatically.

6.1. From Operator to Orchestrator

In traditional and even connected planning, much of the human workload involves:

- Gathering and cleaning data
- Building and maintaining models
- Coordinating inputs across teams
- Running reports or analysis on request

In an agentic model, these tasks are delegated to AI agents. The planner's role becomes one of **orchestration**: setting direction, validating agent behavior, and interpreting results in strategic context.

A human doesn't need to run the forecast. They need to define what "good" looks like and when an exception matters.

6.2. Intent Becomes the New Interface

Agents are powerful, but they lack intrinsic understanding of corporate priorities, risk tolerances, or cultural nuance. These must be communicated through **intent**, the high-level guidance humans provide.

Examples of intent include:

- "Maximize growth in new markets without increasing net headcount."
- "Prioritize cash flow stability over inventory expansion this quarter."
- "Reduce exposure to single-supplier dependencies in our Tier 2 network."

This is not coding or scripting. It's expressing judgment, constraints, and goals in business terms. In this model, the planner becomes a **strategic designer**, not a tactical executor.

6.3. Enterprise Fluency Becomes a Strategic Skill

As agents take over execution, what separates great planning leaders from average ones is **not technical skill**, but **business fluency**.

To effectively set intent, planners must understand:

- How the enterprise creates and loses value
- How operational realities intersect with financial goals
- Where risks accumulate, and how trade-offs cascade

This knowledge is what allows planners to guide agents productively. Without it, agents may optimize plans that look elegant but miss the mark entirely.

6.4. Human-AI Collaboration is the New Normal

Agentic Planning is not automation. It's **collaboration**.

Humans set goals. Agents propose paths. Humans select the right one, revise the constraints, and feed back what success looks like. Over time, this tightens the loop and improves performance.

This model of **shared agency** (where humans and machines each play to their strengths) requires a cultural shift:

- Trust must be built in agent recommendations.
- New roles will emerge: agent trainers, planning strategists, narrative interpreters.
- Planning will become more interactive and conversational, rather than linear and procedural.

6.5. The Best Planners Will Be Thinkers, Not Technicians

This is the most fundamental shift. In the past, the best planners were those who knew the tools best. In an agentic world, the best planners will be those who think systemically, communicate intent clearly, and understand how to guide autonomous systems with precision.

In that sense, Agentic Planning elevates, not erases, the human planner. But it changes what excellence looks like.

7. The Impact on SaaS

The rise of Agentic Planning doesn't make SaaS irrelevant, but it redefines its role.

Most enterprise software today is designed around human interfaces: dashboards, forms, visualizations, and clicks. In a world where AI agents, not humans, are interacting with systems to drive planning and decision-making, the very foundations of SaaS must evolve.

7.1. From User Interface to Agent Interface

Traditional SaaS assumes a human user:

1. Logs in
2. Navigates a UI
3. Selects a module
4. Runs a process or views a report

In Agentic Planning, the "user" is often an AI agent.

Agents need access to structured data, flexible logic, and executable actions, not tooltips, buttons, or embedded charts. This requires SaaS platforms to expose:

- Rich APIs and event-driven architectures
- Semantic data layers that agents can interpret
- Fine-grained access controls and governance for machine-to-machine operations

Outcome: SaaS becomes less about interfaces, more about infrastructure.

7.2. Composability Becomes Essential

In an agentic system, the value of monolithic applications diminishes. What matters instead is the **composability** of services.

Planning agents don't care if scenario modeling lives in the same UI as workforce planning. They care that:

- The service is accessible
- The logic is transparent
- The outputs are reusable

This favors SaaS providers who offer modular capabilities, what some call **"headless" planning services**, that can be orchestrated by agents across functions.

Outcome: SaaS vendors must unbundle, modularize, and make their services agent-friendly.

7.3. Orchestration Is the New Differentiator

In the past, SaaS differentiation came from depth of features, ease of use, or visual design. In the agentic era, the primary differentiator will be **how well your system supports orchestration**.

- Can it be embedded into an agent workflow?
- Can it respond to triggers and hand off results?
- Can it support iterative, conversational planning loops?

If the answer is no, that system becomes a bottleneck.

Outcome: SaaS that cannot participate in intelligent orchestration will be bypassed, no matter how mature its feature set.

7.4. Pricing and Licensing Models Will Shift

If agents, not humans, are triggering forecasts, executing plans, and pulling reports, the logic of seat-based pricing starts to break down.

New models will emerge:

- **Consumption-based pricing** for API calls, simulations, or generated scenarios
- **Role-based agent subscriptions**, where orchestration capacity is tied to planning domains
- **Hybrid models** blending human and machine usage tiers

This shift may be uncomfortable for vendors, but necessary to reflect the new planning reality.

7.5. SaaS Is Not Dead, It's Becoming Invisible

Agentic Planning does not eliminate the need for enterprise software. But it does demand that SaaS:

- Be accessible without friction
- Support autonomous interaction
- Operate as a back-end intelligence source, not a front-end task list

7.6. Human Implementors Still Matter

One important misconception to avoid is that AI agents will configure and manage planning systems entirely on their own. That's not realistic.

In the Agentic Planning model, **SaaS platforms will still require configuration by humans**, specifically by implementors, consultants, or internal system owners who understand both the software and the organization's unique planning needs.

While agents will handle execution, simulation, and analysis, they rely on:

- Defined planning structures
- Mapped hierarchies
- Established data flows
- Business rules configured in the system

In short, SaaS doesn't disappear. It becomes **embedded**, **composable**, and **agent-ready**. But it will always require skilled implementors behind the curtain to ensure that what agents orchestrate actually works.

8. How to Prepare

Agentic Planning isn't a plug-and-play upgrade, it's a fundamental shift in how planning is done. Adopting it requires a rethinking of tools, workflows, and, most importantly, mindsets.

Organizations that succeed will be those who approach this transformation deliberately: building the right foundations while moving quickly enough to stay ahead of the curve.

8.1. Start with Problems, Not Promises

AI is not a strategy. It's a set of capabilities.

Rather than chasing hype, organizations should start by identifying high-friction planning areas:

- Are forecasts constantly out of sync with reality?
- Are planning cycles too slow to respond to market shifts?
- Do frontline teams feel excluded from the planning process?
- Is there too much time spent gathering data and not enough interpreting it?

These friction points become natural test beds for agentic approaches.

8.2. Prepare the Foundations

AI agents don't work in a vacuum. They need clean data, accessible systems, and a clear view of how the business is structured. Before you can orchestrate planning through agents, you must ensure:

- **Data readiness**: Integrated, clean, and accessible across systems.
- **Platform interoperability**: APIs and data layers that allow agents to interact with SaaS tools.
- **Governance**: Defined policies for who sets intent, who approves actions, and how feedback is handled.

This doesn't require a ground-up rebuild. But it does require removing technical and organizational barriers that prevent automation and orchestration.

8.3. Identify Agent-Ready Use Cases

Agentic Planning doesn't have to start enterprise-wide. In fact, it shouldn't.

Start small: choose one domain, one planning process, or one critical function where autonomy would create outsized impact. Good early-stage examples include:

- Scenario modeling for macroeconomic risk
- Rolling workforce planning based on attrition and pipeline
- Sales planning with dynamic territory allocation

Test, observe, and refine before expanding.

8.4. Invest in People, Not Just Platforms

Agents can simulate. They can recommend. But they still rely on humans to set intent.

That means the success of Agentic Planning depends not just on technology, but on people who:

- Understand how the business operates end-to-end
- Can express priorities and constraints clearly
- Are comfortable collaborating with AI, not competing against it

Upskill your teams in enterprise thinking. Help them shift from being model builders to strategic planners. Provide visibility into how agents work and how decisions are made. Confidence in the system is just as important as its capability.

8.5. Define a Clear Maturity Roadmap

Agentic Planning doesn't require a dramatic overhaul overnight. Most organizations will move through progressive stages as they build the foundations, experiment with agents, and shift the role of their people.

Here's a more practical roadmap to guide that journey:

Stage 1: Manual Planning

Planning is spreadsheet-based, fragmented, and reactive. Data is scattered, forecasts are point-in-time, and processes rely heavily on human effort.

- Annual cycles dominate
- No shared planning platform
- Low visibility across functions

Stage 2: Platform-Enabled Planning

Core planning processes are digitized and connected. The organization adopts a planning platform (e.g., EPM), enabling collaboration and centralized data.

- Rolling forecasts begin
- Functional alignment improves
- Some automation of workflows and approvals

Stage 3: Intelligence-Augmented Planning

AI enhances specific aspects of planning, but humans remain in control. Examples include predictive forecasting, anomaly detection, and automated data cleansing.

- Planning is faster and more accurate
- Planners interact with AI through reports or copilots
- Agents suggest, but humans decide and execute

Stage 4: Agent-Orchestrated Planning

Autonomous agents actively participate in executing planning tasks. They simulate, coordinate, and propose changes across domains within human-defined guardrails.

- Multiple agents handle domain-specific tasks (e.g., sales, workforce)
- Scenario modeling is dynamic and continuous
- Humans shift from input providers to orchestrators

Stage 5: Intent-Led Planning

Humans define high-level strategic goals; agents manage planning autonomously. Planners no longer operate tools. They set direction and interpret outcomes.

- The planning function becomes a system of continuous adaptation
- Enterprise fluency replaces technical fluency as the key skill
- The organization plans at the speed of change

This roadmap is not about perfection at every stage, it’s about movement. The key is to start, learn, and evolve with purpose.

9. Conclusion

The pace of change in today's business environment is unrelenting. Market volatility, supply chain disruptions, shifting workforce dynamics, and emerging technologies are testing the limits of traditional planning models. Even connected platforms, once considered cutting-edge, now struggle to keep up.

What's needed is not more dashboards or faster spreadsheets. What's needed is a new operating model.

Agentic Planning offers that model.

By embedding intelligence into the planning process itself, it turns planning into a living system, always-on, always-learning, and continuously adjusting to new information. It replaces manual coordination with machine-driven orchestration. It frees planners from tool constraints and empowers them to focus on what truly matters: setting direction, defining intent, and guiding the enterprise forward.

But this isn't just about technology. Agentic Planning is a leadership shift. It challenges organizations to rethink how decisions are made, how roles are structured, and how humans and machines collaborate.

The path forward won't be uniform. Some organizations will move faster than others. But the trajectory is clear: planning that is static and human-only will increasingly be outmatched by systems that are adaptive, distributed, and intelligent.

The organizations that embrace this shift now, reimagining the role of planning, investing in their people, and preparing their systems, will lead the next era of enterprise performance.

The future isn't just planned. It's orchestrated.

And it starts with a new question: *What intent will you set?*