



Agent-ready commerce:

The new Retail & CPG operating
system for an AI-mediated shopper



AI is entering the purchase decision and rewriting the rules of commerce

For years, eCommerce has developed around a relatively stable premise: attract a person, bring them into a controlled environment, and help them move through a journey designed to convert interest into a purchase. Search engines, marketplaces, apps, campaigns, recommendation engines, and loyalty programs have progressively refined that model, yet its underlying logic has remained largely unchanged. The consumer searched, compared, and decided; the company competed to capture attention and remove friction between those three actions.

Agentic AI introduces a far more fundamental disruption. Between consumer intent and commercial supply, **a new layer of intermediation is beginning to emerge—one capable of interpreting needs, assessing alternatives, eliminating unsuitable options, and, increasingly, executing decisions.** Search is no longer necessarily a sequence of links and visits. Comparison can take place before the shopper ever enters a digital store. And, in certain scenarios, the transaction itself is beginning to leave the retailer-controlled environment and move into a conversation, an AI platform, or an ecosystem coordinated by intelligent agents.

The early signals already reveal the direction of travel. Traffic generated by AI assistants to retail websites is growing rapidly and displaying particularly valuable behavioral patterns: longer sessions, deeper exploration, and more advanced purchase intent. These are not visitors arriving at the start of an open-ended search. They are **consumers who have already delegated part of the analysis** and enter the retailer's environment with a more clearly defined set of preferences.

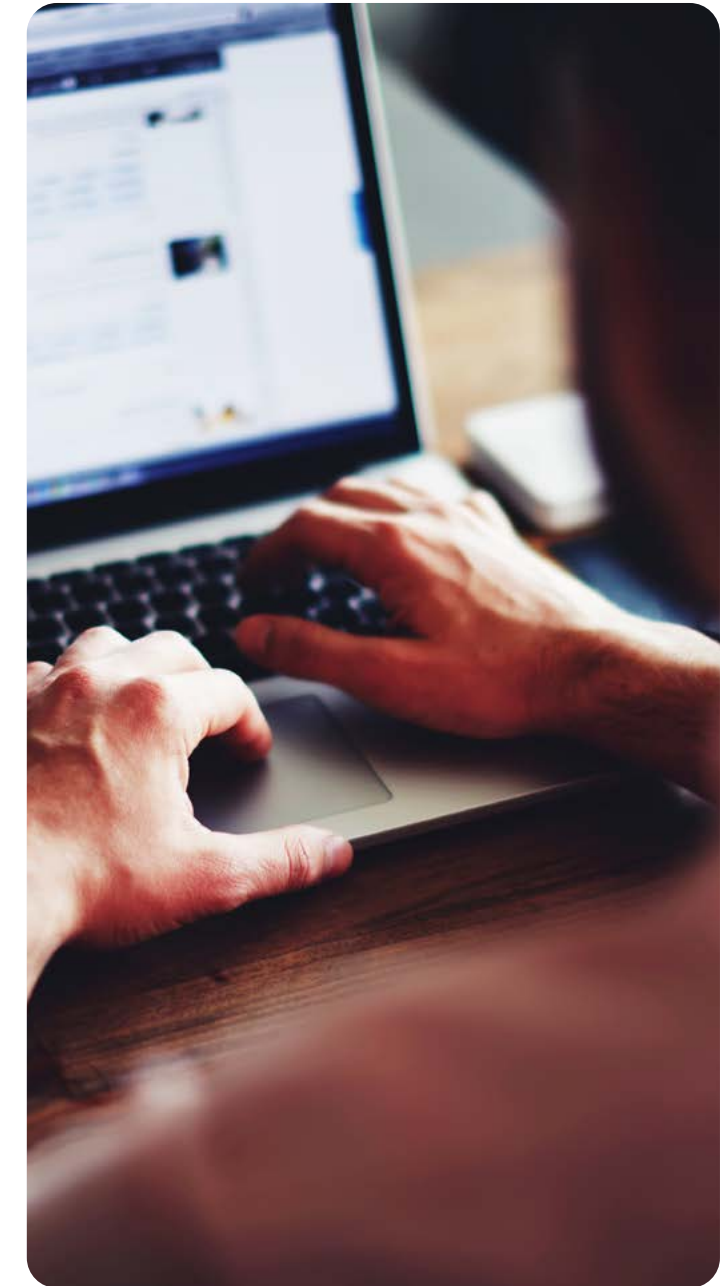
That distinction matters. The impact of agentic AI on commerce **will not be determined solely by the number of transactions an agent can complete** autonomously. Its first major consequence will be the transformation of everything that happens before the purchase. Initial selection, the construction of a shortlist, the interpretation of product attributes, and the evaluation of price, availability, quality, delivery, and trust are beginning to take place inside systems that retailers do not fully control.

Consumers, for their part, appear willing to move in this direction for highly practical reasons. Adoption is taking hold first where AI removes work: researching products, comparing options, finding offers, building shopping lists, and reducing an overwhelming number of choices. Autonomy gains ground

because it solves a form of friction that digital commerce itself has intensified over the years: the cognitive burden created by too much choice, too much information, and too little time. **Agents create value when they turn that abundance into a manageable, relevant, and context-aware recommendation.**

This evolution should not, however, be interpreted too hastily. Consumers are not indiscriminately handing over their decisions to technology. They want to save time, but they also want to know which data has been used. They value personalization yet still expect the ability to supervise. They may accept that a system compares, filters, and even prepares a purchase, but they remain more cautious when payment, identity, personal information, or an irreversible decision is involved. **Commercial autonomy will therefore advance at the speed of trust**, not at the speed of technical capability.

This transition is also reshaping the competitive landscape for retailers and manufacturers. Until now, digital visibility has depended primarily on appearing in front of the consumer: securing a prominent position in search, attracting traffic, making a product stand out visually, and persuading the customer within a proprietary channel. In AI-mediated commerce, visibility increasingly depends



on being understood by a machine. A product may be perfectly presented to a human user and still **remain irrelevant to an agent if its attributes are incomplete**, its promotions cannot be verified, its availability is not updated in real time, or its delivery and returns policies cannot be interpreted reliably.

Competition **is therefore shifting from ranking to algorithmic eligibility**. Being found will still matter, but it will no longer be enough. Brands will need to be interpretable, comparable, and actionable. Product catalogs, pricing, inventory, claims, promotions, loyalty conditions, and fulfillment promises must operate as a coherent representation of the business rather than as separate elements adapted to individual channels. When an agent selects before the consumer visits a website, being excluded from that first assessment effectively means not existing at all.

One of the report's central findings follows directly from this point: **preparing for agentic commerce begins long before deploying agents**. It begins with data quality, enterprise architecture, and the ability to expose commercial capabilities through interoperable interfaces. A model may be able to reason over complex intent, but it cannot deliver a reliable answer if inventory data is outdated, prices differ between systems, or product information lacks semantic consistency. The sophistication of the agent cannot compensate for the fragility of the operation behind it.

For the CIO, this shifts the conversation away **from isolated experimentation and toward the design of a new commercial operating system**. The business needs a layer capable of connecting

product information, order management, customer data, payments, promotions, pricing, inventory, and fulfillment; sharing context securely; and responding in real time to both internal and external agents. Emerging protocols will make that connectivity easier, but the real work remains inside the organization: modernizing systems, removing silos, defining authoritative data sources, and turning commercial functions into reliable and governable services.

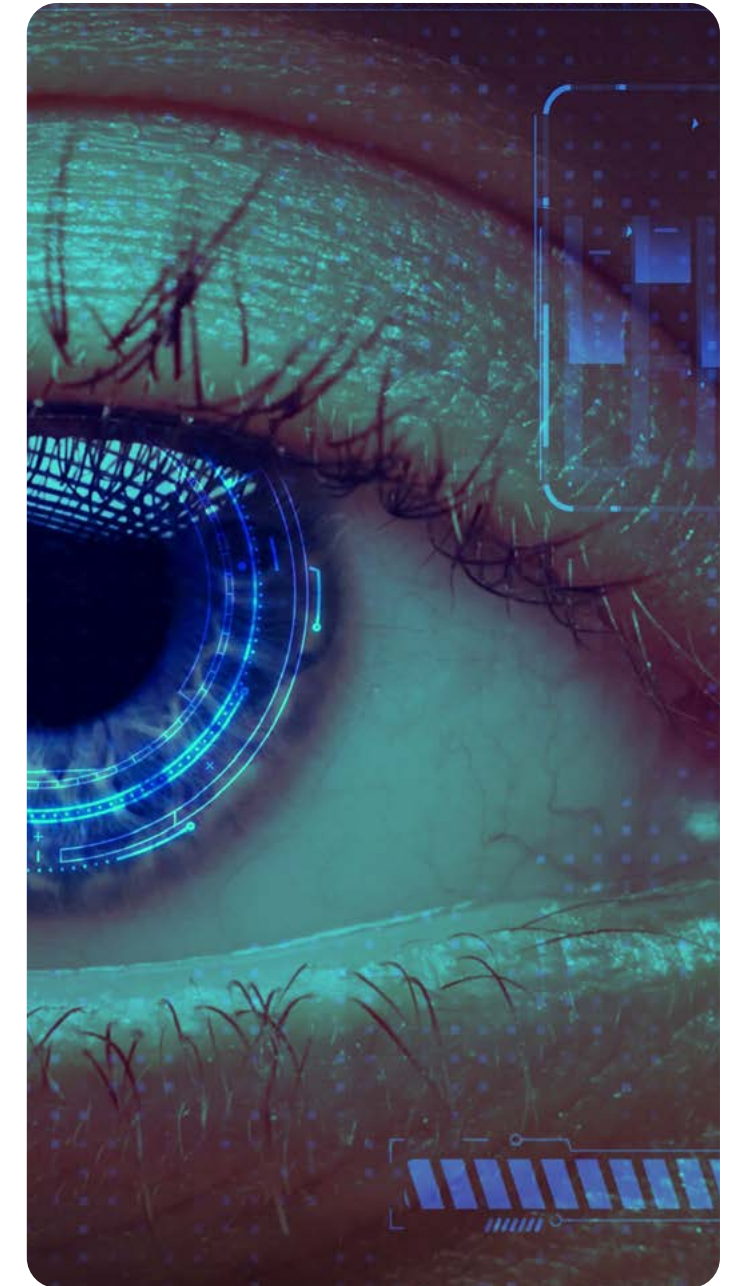
The same pressure coming from the consumer is also transforming internal operations. A market in which demand can be detected, interpreted, and activated at machine speed is difficult to manage through monthly planning cycles, fixed promotional calendars, or sequential decision-making across departments. The opportunity is moving toward a **continuous decision model in which every signal updates the context**, every decision triggers a response, and every outcome feeds the next cycle of learning.

Pricing, promotions, assortment, inventory, retail media, customer experience, and logistics can no longer be optimized independently. A pricing decision affects margin, but it also changes demand, stock rotation, availability, promotional investment, and delivery performance. **Agentic intelligence creates real value when it helps coordinate** those consequences against shared objectives, defined constraints, and clearly established levels of autonomy. The goal is not merely to automate a specific task, but to reduce the distance between what the market is signaling and what the organization is able to execute.

This evolution also creates **a new leadership challenge**. Preparing a company for agentic commerce cannot be delegated exclusively to technology, data, or innovation teams. It requires collective decisions about the operating model, ownership, metrics, risk, and business priorities. It forces organizations to reconsider who defines the limits of an automated promotion, how conflicts between margin and conversion are resolved, which decisions must be escalated to a person, and what information can be shared with external platforms. Technology architecture and organizational architecture are becoming two expressions of the same design.

As the model matures, eCommerce will look less like a sequence of pages and more like an ecosystem of coordinated capabilities. A customer agent may interact with brand, category, pricing, inventory, payment, service, or compliance agents. Each will contribute a specialized function, but the quality of the outcome will depend on their ability to share context, operate under compatible rules, and coordinate decisions without degrading the experience. Competitive advantage will emerge from this orchestration capability: interpreting intent accurately, constructing a viable response, and executing it before the opportunity disappears.

Speed, however, must not be confused with autonomy without boundaries. The more decisions are distributed across agents, the harder it becomes to understand how a particular outcome was reached. A recommendation error can become a service issue; a pricing inconsistency can spread simultaneously across multiple channels; a poorly contextualized logistics decision can



undermine a commercial promise. When systems operate continuously and influence one another, **governance can no longer be treated as a post-deployment review. It becomes part of everyday commercial operations.**

Trust must therefore be built into the architecture itself: verifiable identities, explicit permissions, operational thresholds, decision logs, observability, intervention mechanisms, and traceability over the data used. Consumers need to understand what they are delegating and retain the ability to correct or stop an action. Companies, in turn, must maintain control over pricing, claims, policies, and the way their brand is represented by external systems. **Sustainable autonomy depends on every decision being understandable, governable, and auditable.**

At Softtek, we believe this transformation should be approached with ambition, but also with **operational discipline.** Agentic commerce creates an exceptional opportunity to remove friction, increase the relevance of every interaction, and coordinate the business at a speed that was previously unattainable. It also forces organizations to confront foundations that many have postponed addressing: data quality, interoperability, process fragmentation, system rigidity, and the absence of governance models designed for automated decision-making.

The companies that lead this next phase will not necessarily be those that deploy the largest number of agents, nor those that announce fully autonomous experiences first. They will be the ones capable of building **commerce that is understandable to machines and trustworthy to people**; of converting fragmented information into coordinated decisions; and of increasing speed without surrendering control over operations, profitability, or brand.

Demand is beginning to be mediated by intelligence. The enterprise response must be equally intelligent.



The next great battle in
commerce **will be won
before** the consumer ever
reaches the digital storefront



Retail enters the era of agent-mediated commercial decision-making

The public emergence of GenAI in 2022 marked a turning point for the technology industry. Tools such as ChatGPT have demonstrated at massive scale that **AI models can interact naturally, interpret complex language and assist with real tasks** at a level of sophistication once reserved for experimental environments.

Since then, their development has accelerated exponentially: model capabilities have evolved rapidly, infrastructure investment has surged, and a new generation of intelligent platforms and tools has begun to transform the way consumers and businesses interact with the digital environment.

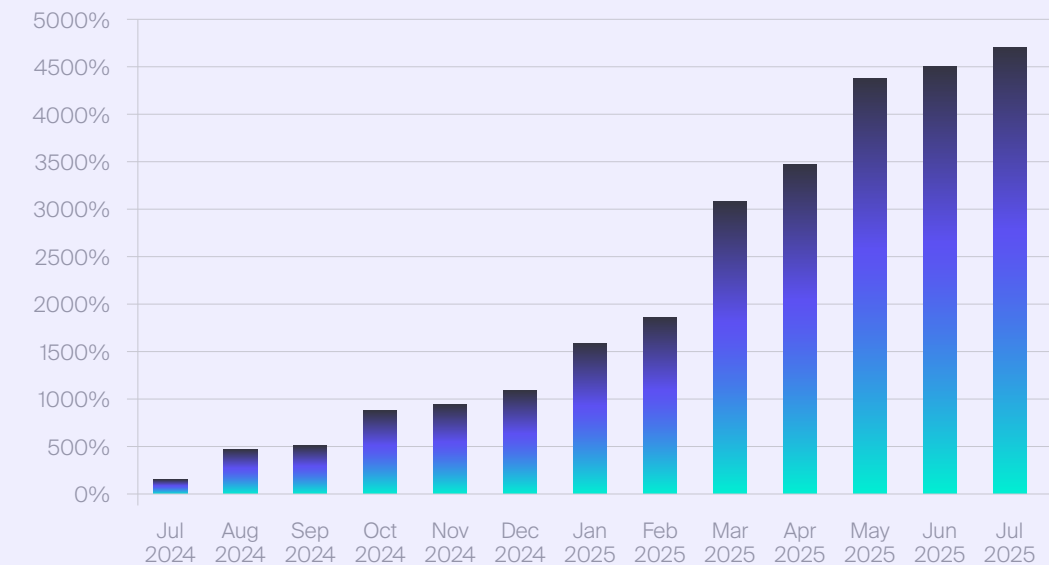
Retail and eCommerce have not been left out of this transformation. **Traffic from AI assistants to retail websites in the United States grew 4,700%** year over year in July 2025, accompanied by behavioral signals especially relevant to business, such as sessions **32%** longer, **10%** more page views and a bounce rate **27%** lower than traditional traffic.

More importantly, users who reach retailers through AI agents show **significantly higher intent levels, entering the commercial funnel at stages much closer to the purchase decision.**

This shift reflects a deeper transformation than the simple adoption of new interfaces. In this context, infrastructures, protocols and tools **specifically designed to enable interaction** between agents and commercial systems are beginning to emerge. These solutions anticipate an environment in which retailers and manufacturers will compete not only for human attention, but also to be interpreted, prioritized and selected by intelligent systems.

Growth in the share of AI-driven visits (Retail)

Percentage growth



Gradual emergence of shopping assistants



ChatGPT
Shopping



Google Gemini +
Universal Cart



Amazon
Rufus



Shopify
Sidekick



Salesforce
Agentforce



Klarna AI
Assistant

The combination of **new commercial assistants and greater AI-mediated traffic** signals the start of a transition from human interfaces toward algorithmic decision ecosystems.

A new decision-maker
now stands between brands
and consumers—filtering,
comparing and shaping
every choice



The transformation of the decision-maker: from user to assistant

AI-powered shopping agents have already begun to redefine **how consumers discover, evaluate and select products in digital environments**. Traditionally manual tasks such as searching for alternatives, comparing prices, reviewing opinions or filtering options based on personal preferences are delegated to systems capable of interpreting context, constraints and intent in real time, reducing friction and simplifying the purchase journey.

In **the United States**, **38%** of consumers say they have used generative AI for online shopping and **52% considered doing so during 2025**. The main use cases have included product research (53%), personalized recommendations (40%), deal hunting (36%) and shopping list generation (30%). In **Europe**, adoption has been even higher: **84%** of consumers in markets such as France, Germany and the United Kingdom say they use AI tools in their daily lives, while **38% already use them specifically to research products or make purchase decisions**.

Through 2025, AI agents have primarily supported product discovery, comparison and recommendation, while in-chat purchasing experiences have only recently begun to emerge. As trust in these systems grows, consumers **will begin to delegate increasingly broad parts of the commercial journey**, progressively shifting decision-making from traditional human interfaces toward algorithmically mediated environments.

Agentic commerce adoption phase

1

WIDELY ADOPTED

Product discovery

The AI agent helps discover and compare, linking to the websites of retailers, where the customer completes the purchase

2

EMERGING NOW

In-chat purchase

The AI agent completes the transaction within the chat, without sending the customer to an external website

WE ARE HERE

3

NEAR FUTURE

Autonomous agents

The AI agent manages the entire purchase process on its own, with very little customer intervention

4

FUTURE STATE

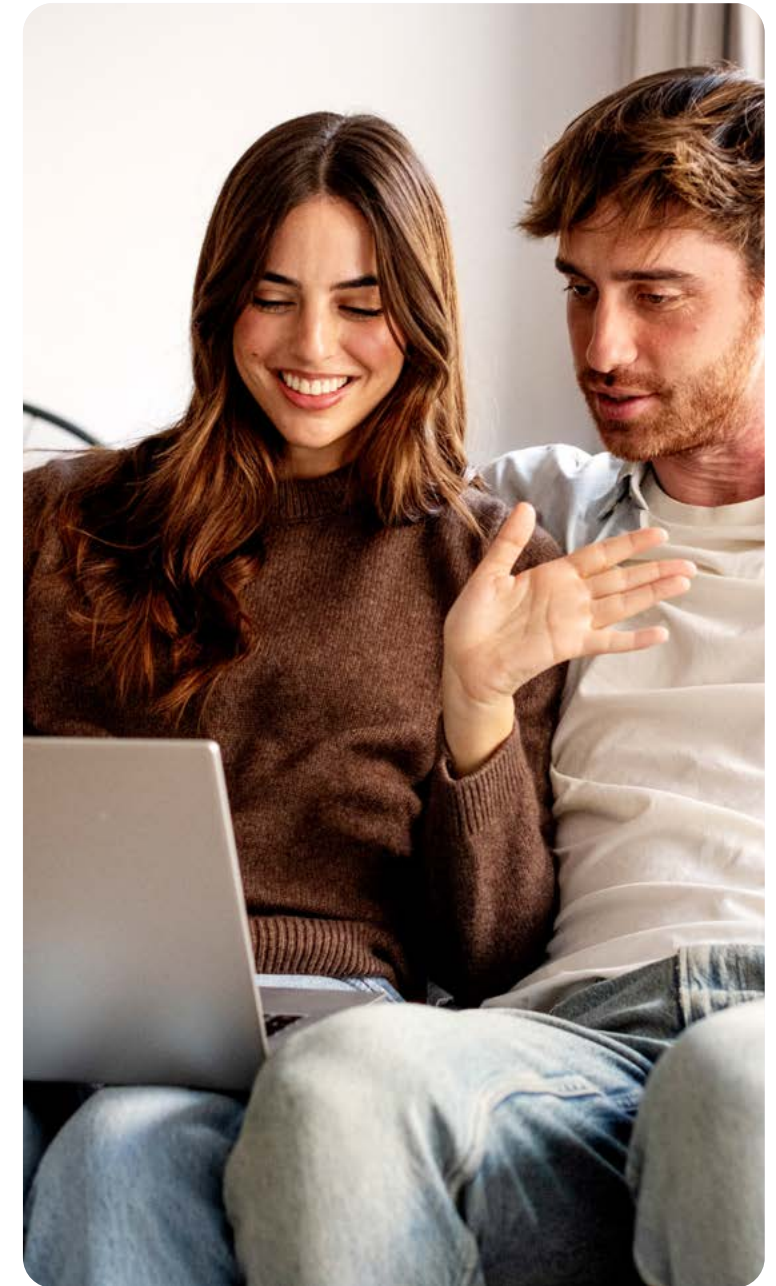
Agent to agent

Third-party AI agents talk directly with brands' agents to complete purchases, with hardly any customer intervention

Automation advances fastest where it reduces cognitive friction

Although AI adoption remains higher in the early stages of the journey, **consumers are also beginning to show interest in delegating responsibilities at later stages.** In this way, it is clear that shoppers see AI mainly as a tool for reducing cognitive friction rather than as a complete substitute for human decision-making.

Indeed, users especially value agents' ability to automate time-intensive tasks, but they **still demand oversight, transparency and control at the most sensitive moments**, especially those related to payments, personal data or transactional execution. Approximately **85% of U.S. consumers consider it important to maintain visibility over how their data is collected and used**, as well as to retain the ability to personalize, oversee or delete their commercial information. This explains why the market has evolved toward models of assistance and co-decision before advancing toward fully autonomous experiences.



Adoption drivers

Consumers see AI agents as **tools, not as a novelty:**



Automating repetitive tasks such as comparing prices or reordering



Accessing better deals and personalized recommendations

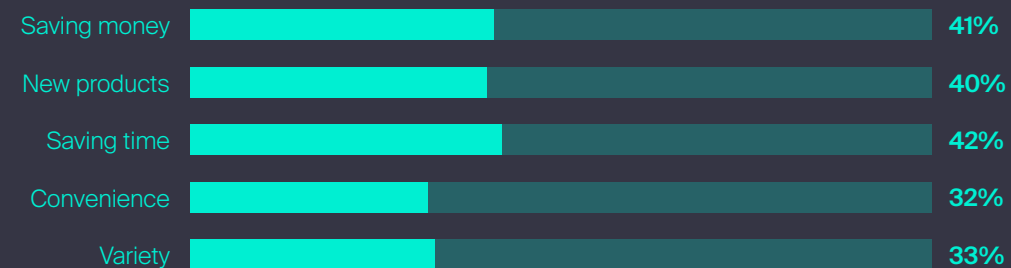


Reducing decision fatigue with relevant, filtered options

Most important factors when shopping online



Factors that motivate using an agent



Adoption limits

Consumers still demand **oversight, transparency and control:**



Data privacy and **how it is collected and used**

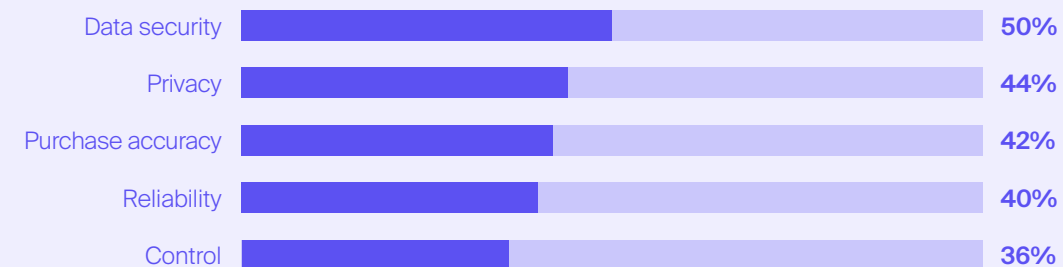


Purchase accuracy and **fear of transaction errors**



Loss of control over the final decision

Concerns about AI agents



Does control over data matter?

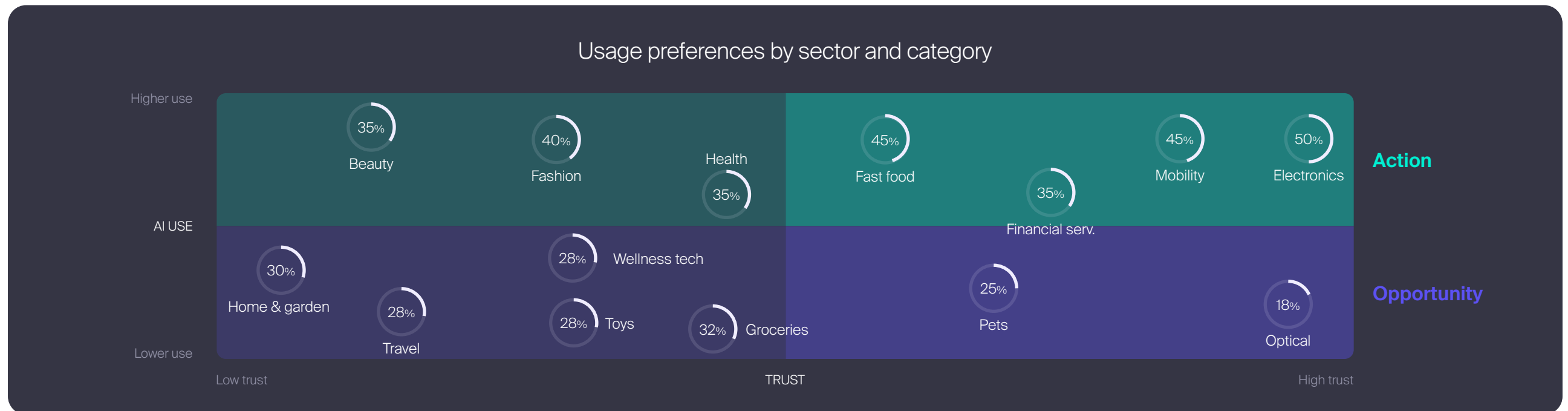


Trust determines which platforms capture the consumer relationship

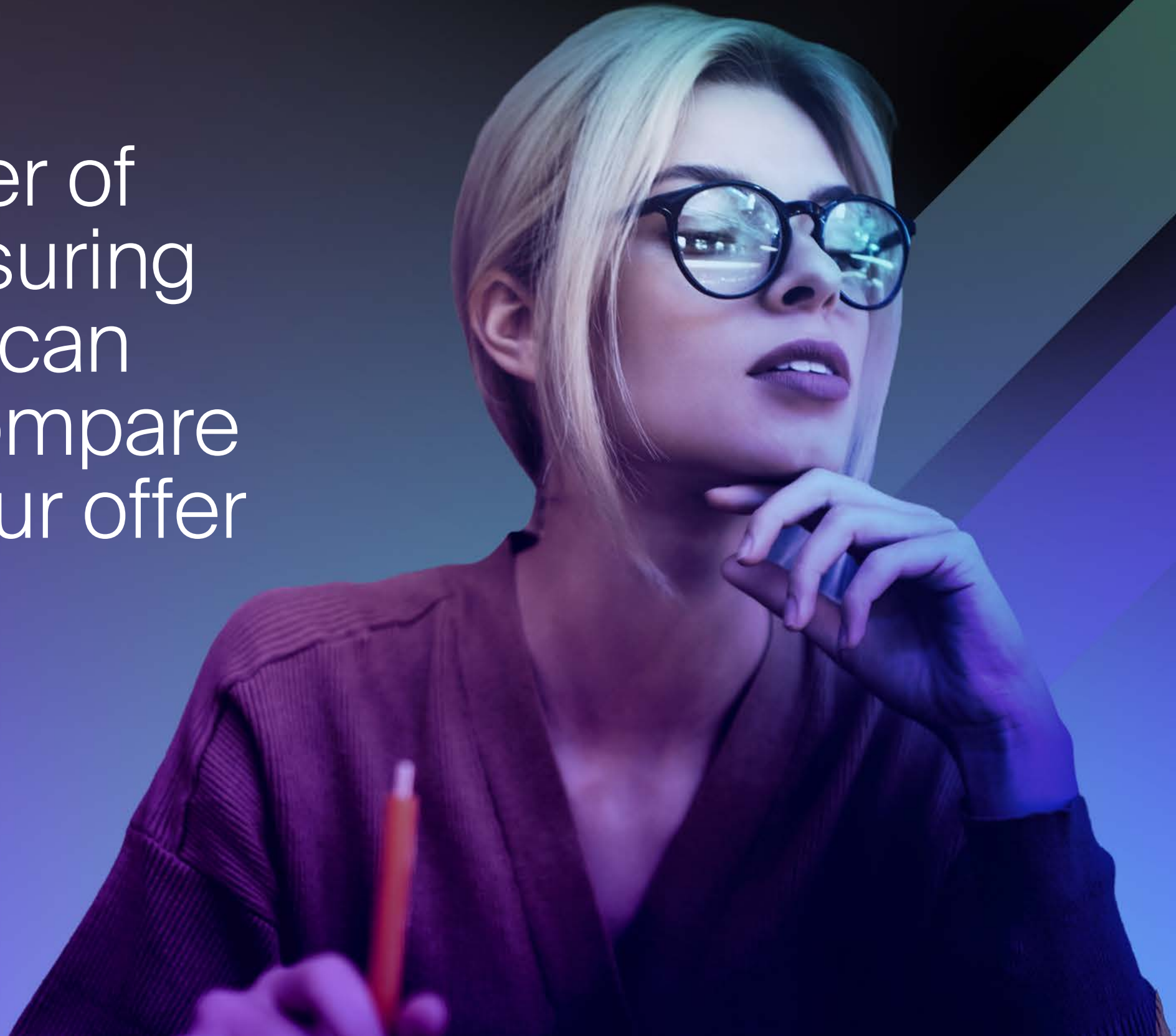
The evolution of agentic commerce will depend less on agents' technical capability and more on the ability of retailers, platforms and ecosystems to progressively build trust throughout the entire shopping journey. As consumers perceive greater transparency, traceability and control over how systems interpret and execute decisions, **their willingness to delegate more sensitive phases of the commercial process will also increase.**

In this context, **retail emerges as one of the sectors with the greatest growth potential within agentic commerce.** Categories such as apparel, footwear & accessories already lead the use of AI applied to shopping in Europe, especially in processes that involve extensive comparison, exploration and evaluation. Adoption accelerates particularly where AI manages to reduce cognitive friction and simplify complex decisions without yet requiring physical validation or full delegation.

Rather than a permanent barrier, these differences reflect a **gradual transition toward increasingly advanced automation models.** Trust thus becomes one of the market's main strategic enablers and a factor that will directly influence which retailers, platforms and agents manage to capture the **consumer relationship within AI-mediated commercial ecosystems.**



The next frontier of **visibility** is ensuring that machines can understand, compare and choose your offer



Visibility built for agents, not for humans

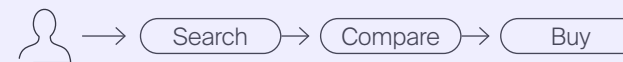
Although agentic commerce is still in its early stages, **discovery** already emerges as the part of the **shopping journey where the impact on commerce is most visible**.

This shift **alters how digital visibility is built**. As agents begin to filter, compare and prioritize products before the user interacts with a platform, it stops depending on human interfaces and comes to **depend on how the ecosystem interprets the available commercial information**.

As a consequence, retailers and brands will no longer compete to capture traffic or rank in traditional search engines, but rather to **be part of the systems that structure and recommend demand**.

Manual vs. agentic search

Traditional discovery

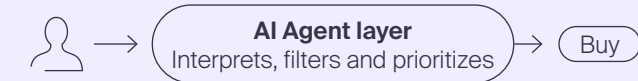


Discovery depends on **human navigation, visibility** in search engines **and manual comparison**:

- Human navigation
- Traditional SEO
- Manual comparison
- Static results
- Competition for traffic

AI
new layer of
intermediation

AI-mediated discovery



Discovery depends on **how agents interpret, compare and prioritize** commercial information:

- Algorithmic interpretation
- Discoverability
- Automatic evaluation
- Contextual recommendations
- Agent prioritization

New visibility systems

SEO

Search engine optimization

VISIBILITY THROUGH KEYWORDS AND RELEVANCE

Intent journeys

discovery reorganizes around the search intent of online consumers.

End-to-end alignment

Marketing, merchandising and tech share product, content and metadata under a single visibility objective.

GEO

Generative engine optimization

APPEAR WITHIN AI ANSWERS AND SUMMARIES

“Zero-click” answers

AI summaries and deep links bypass home and category pages: the brand competes within the answer itself.

Quality and provenance

Ranking determined by the quality, freshness and traceability of structured data.

Content that is machine-readable

Content must be structured and understandable by models in order to be ingested and cited.

ACO

Optimization for agentic commerce

AVAILABILITY FOR AGENTS TO ACT AND CLOSE OFFSITE

Agents that act

Agents plan and execute actions on behalf of the user directly on the brand's websites and APIs.

Signed identity

Cryptographically signed agent identity (verified HTTP requests) to authorize transactions.

Ads in AI search

Advertising within generative search is becoming essential for remaining competitive.

Digital competitiveness evolves from ranking to algorithmic eligibility

In this context, discoverability evolves from models centered on SEO and human navigation toward **GEO and ACO approaches**, where brands must prepare catalogs, attributes, claims, **promotions, availability and policies to be interpreted, contextualized and acted upon** by generative engines and agents capable of automatically comparing, prioritizing and executing commercial decisions.

SEO

Search Engine

Optimize to be found by consumers

In traditional models, retailers compete to **capture human traffic within search engines, marketplaces and owned channels.**

Visibility

Keywords, organic ranking, paid search, metadata, optimized content and click generation

The consumer **entered queries, browsed results, opened multiple pages** and compared products manually before making a decision.

Catalogs, promotions and product pages were designed primarily to **visually persuade the consumer and maximize conversion** within eCommerce.

GEO

Generative Engine

Optimize to be interpreted by generative engines

Discovery begins to shift from manual navigation toward **AI-synthesized answers.**

Visibility

Data quality, machine readability, semantic consistency and verifiable information

Generative engines **interpret intent, aggregate information and build contextualized recommendations** within conversational interfaces.

Brands need to **restructure product and commercial information so that models can interpret**, compare and recommend products within automatically generated answers.

ACO

Agentic Commerce

Optimize to be acted upon by intelligent agents

Agents not only interpret commercial information; they also **execute complete workflows on behalf of the consumer.**

Visibility

Algorithmic eligibility within automated decision ecosystems

The agent **compares, validates, interprets promotions, selects fulfillment, applies payment credentials and executes** the transaction on interoperable commercial systems.

Here, the commercial infrastructure needs to **expose the factors through verifiable and continuously synchronized layers** capable of integrating with external agents in real time.

Algorithmic eligibility will depend on data readiness and interoperable protocols

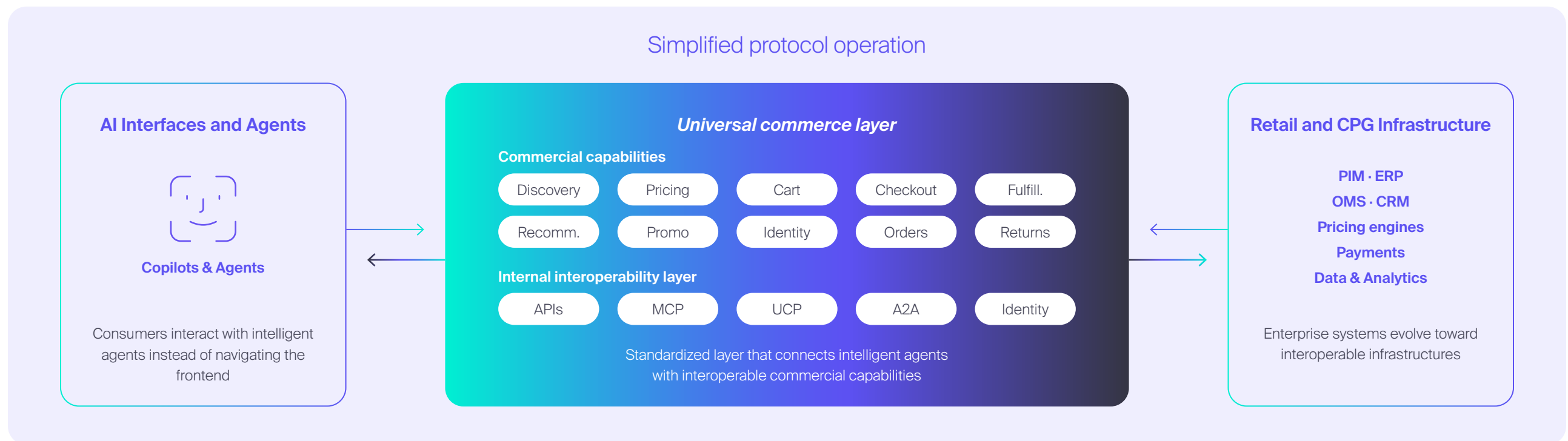
Adapting to discoverability models based on GEO and ACO requires much more than optimizing content for AI; retailers need to **build data infrastructures capable of operating within algorithmic ecosystems in real time.**

Data readiness becomes a critical requirement for algorithmic eligibility. Agents need to **access complete, synchronized and contextualized data** to operate correctly on products, pricing or inventory.

This change forces an evolution toward **models based on APIs, shared semantic layers and protocols capable of connecting systems**, context and commercial capabilities across multiple platforms and external agents.

The ability to generate trust, expose verifiable information and maintain continuous interoperability will begin to influence **which products can be discovered, which retailers manage to integrate into automated journeys and which companies manage to stay relevant.**

Protocols such as MCP or UCP are beginning to consolidate as **mechanisms for sharing data, tools and operating logic in a secure and standardized way**, avoiding reliance on isolated integrations for each new assistant or conversational interface.



Being interpretable becomes the new requirement

Agents do not browse or discover products the way a human consumer would; **they operate by interpreting structure, semantics, context and machine-readable signals derived from structured data.** As a result, the ability to appear, be prioritized and be eligible will depend on how retailers and manufacturers build interpretable, verifiable and actionable information for automated systems:



Product attributes

Standardize taxonomies, complete critical attributes and maintain consistency across PIM, marketplaces and channels so that agents can compare



Claims

Transform claims into verifiable, structured language to help generative engines and agents interpret and prioritize



Pricing and promos

Expose pricing and commercial promotions through APIs and synchronized layers to enable comparison, offer validation and algorithmic optimization



Availability

Connect inventory, logistics coverage and delivery times under interoperable layers to avoid friction and ensure that agents prioritize executable products



Policies and compliance

Structure policies, privacy, loyalty, identity and issue resolution in machine-readable formats capable of integrating into automated processes

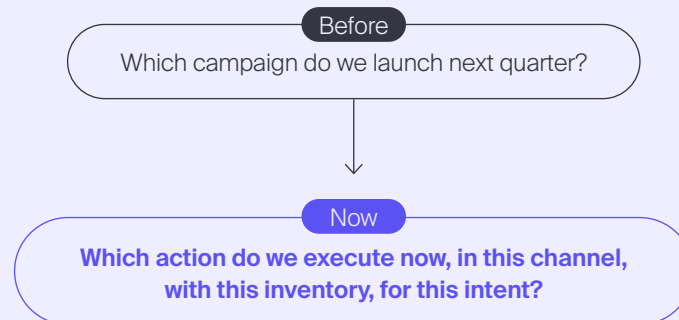
When the market
changes by the minute,
winning means turning
signals into decisions
before anyone else



Retail evolves from static planning toward continuous decision-making

To sustain increasingly personalized and dynamic experiences in retail, **operating logic can no longer depend on static planning cycles**. In environments where demand changes continuously based on real-time signals of intent, context and behavior, models based on monthly price reviews, fixed promotional calendars or periodic assortment decisions quickly lose effectiveness.

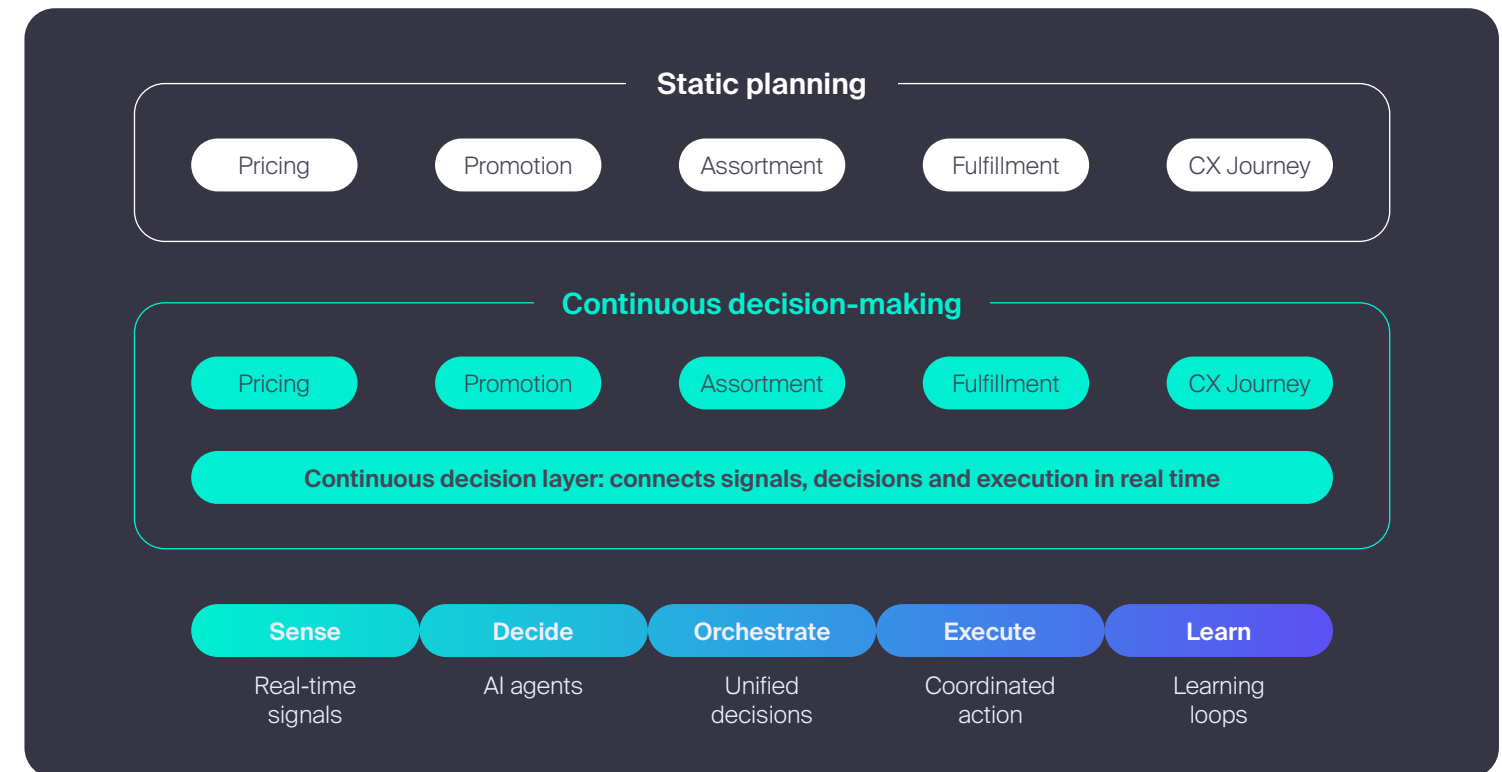
The fundamental question is changing



The different commercial capabilities **thus respond to signals that constantly evolve within the commercial ecosystem**, under an architecture capable of coordinating these functions in real time.

To enable this new model, companies need to evolve beyond discovery, from fragmented organizations toward **systems capable of continuously detecting, deciding and executing on live signals** of demand, intent and operating context. Rather than automating isolated tasks, the goal becomes building architectures where pricing, promotions, assortment, retail media, inventory and fulfillment operate as part of a single coordinated layer of commercial intelligence.

The model thus evolves from sequential, reactive processes toward **environments where each signal feeds decisions, each decision triggers execution and each interaction generates new operational learning**. Specialized agents begin to operate across different commercial domains, **allowing experience, availability and commercial activation to be continuously adapted** to dynamic market changes.



The challenge shifts from adopting AI to transforming operational capabilities

To operate in environments where demand, intent and availability change continuously, beyond adding AI on top of certain existing processes, retailers must **redesign how they make decisions, coordinate functions and execute actions at scale.**

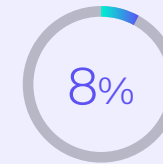
In practice, this forces a rethinking of **how data, systems and teams connect within the business.** Pricing, promotions, inventory, retail media, fulfillment and customer engagement stop working as independent capabilities and become part of a continuous system of coordinated decision-making.

Adapting to this new operating model requires building concrete technological, organizational and strategic capabilities that **enable commerce to respond with speed, context and precision within ecosystems increasingly mediated by AI.**

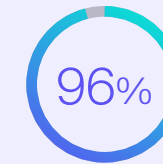
The six capabilities that will define the retailers ready for agentic ecosystems

To build an operating layer capable of responding in real time within agentic commercial ecosystems, retailers will need to develop **specific capabilities that allow them to detect signals, coordinate functions and execute actions with speed, context and precision at scale:**

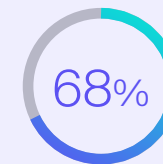
Why retailers must evolve now



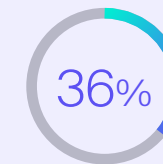
can react to demand changes in real time



already **explore or implement AI** agents

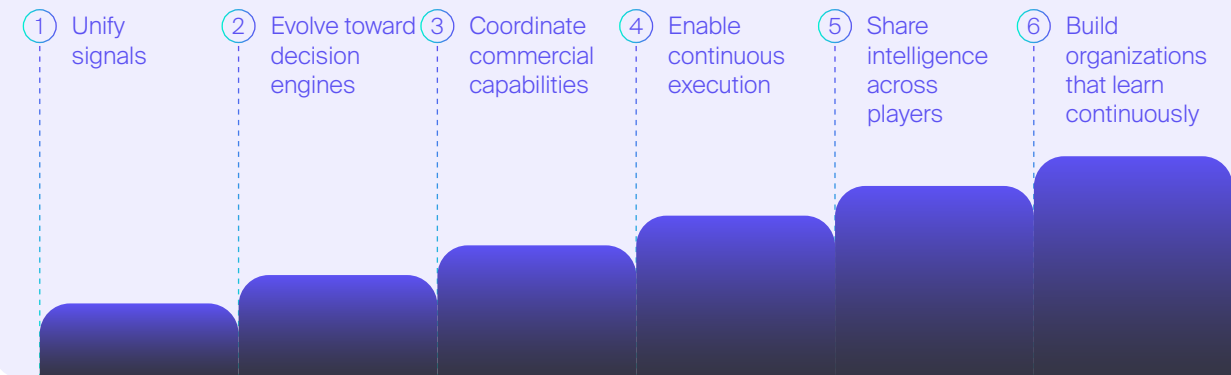


expect AI **to handle most interactions** within 5 years



of European retailers see AI as **indispensable to compete**

The challenge is no longer to add AI on top of existing processes, but to redesign how the business continuously detects, decides and executes



From information to decision

From decision to market

From local to systemic

1

Connect signals under a single operating layer

Adaptation begins by building a shared, real-time view of the business. To do so, companies need to **start by mapping how information currently flows within the organization**: which systems generate critical signals, where operational silos exist and which frictions slow down decision-making.

The goal, beyond integrating data, is to **identify which signals are needed to coordinate different commercial actions under a single operational logic**.

In practice, this means **consolidating data on interoperable cloud platforms, connecting POS and inventory in near real time and beginning to incorporate additional contextual signals** such as omnichannel behavior, promotional performance or local demand.

This allows all business functions to operate from the same real-time view of the business and reduces the time needed to detect, interpret and respond to market changes.



From information to decision

From decision to market

From local to systemic

2

Evolve from reporting toward decision systems

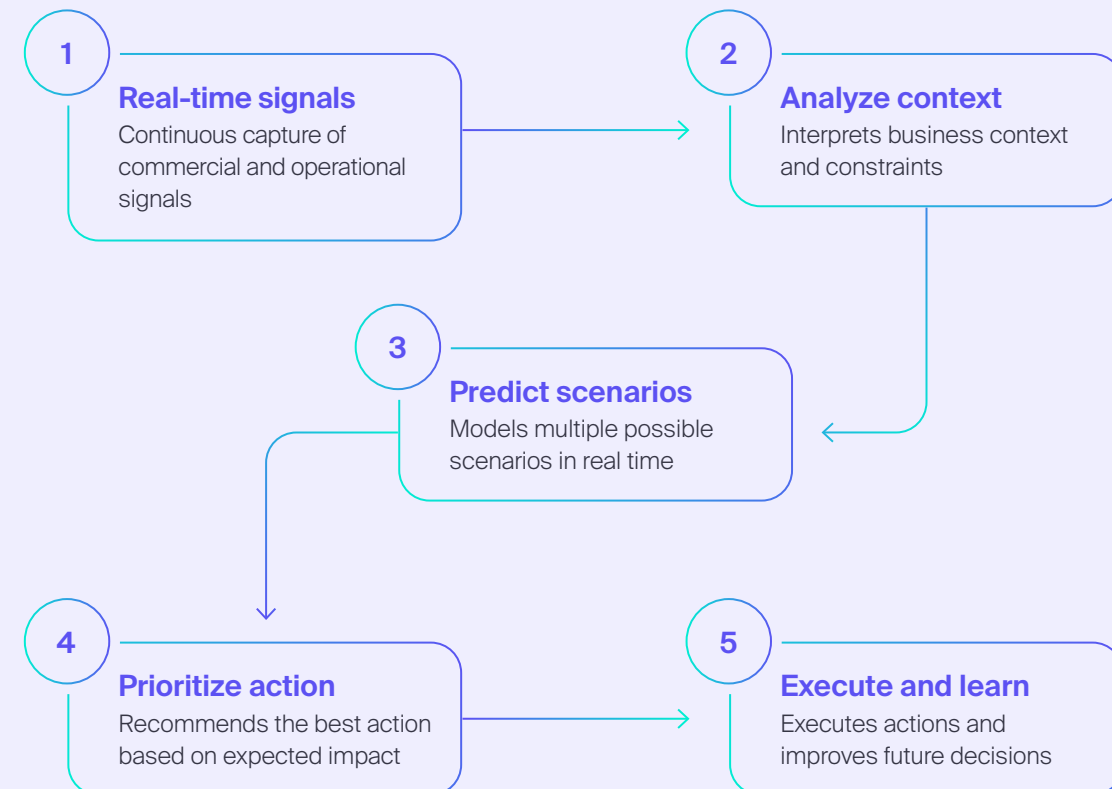
Once the retailer manages to unify operational signals, the next challenge is to transform that visibility into real decision-making capability. In such changing environments, value comes to depend on the ability to **decide what to do before the context changes again**.

To adapt to this new model, the retailer needs to evolve from retrospective analytics toward **decision engines capable of continuously interpreting signals, evaluating operational constraints and recommending concrete actions** according to objectives defined by the company.

It begins by **identifying use cases where automation generates immediate and measurable impact**, such as dynamic pricing, promotional optimization or replenishment recommendations. From there, the retailer must **define which signals feed each decision, which limits must be respected and what level of autonomy the system can take on**.

This makes it possible to **build workflows in which certain operational decisions can be executed automatically** within guardrails previously defined, reserving manual intervention for exceptions or higher-impact strategic decisions.

How a decision engine operates in retail



From information to decision

From decision to market

From local to systemic

3

Coordinate commercial capabilities under a single workflow

Once the data is connected and the decision engines are created, commercial capabilities must cease **operating as independent functions and instead coordinate as a shared autonomous decision system**.

This requires redesigning how commercial decisions are made, avoiding fragmented operations and **transforming these capabilities into coordinated workflows capable of evaluating commercial trade-offs** under the same operating context.

This means moving from static rules and functional ownership toward architectures where **multiple specialized agents collaborate to balance margin, conversion, availability and turnover**.

Adapting to this model requires **building concrete agentic-ready coordination mechanisms**.

Continuous commercial coordination



Signal (example)

Competitor lowers prices

High inventory risk

Limited stock

Weak conversion

Agent-coordinated response

Bundle + loyalty incentive

Promotions only in specific channels

Reduce promotional exposure automatically

Dynamic pricing + fulfillment incentive

From information to decision

From decision to market

From local to systemic

4

Connect decision and execution with interoperable flows

As retailers and brands evolve toward continuous decision-making models, execution speed becomes a critical competitive advantage, **ensuring that decisions reach the market as quickly and effectively as possible.**

In many companies, there is still distance between signal, decision and action; this new operating model seeks to **reduce that operational friction by connecting decision and execution** under interoperable and automated flows **capable of propagating actions in real time across systems, channels and commercial functions.**

Adaptation thus involves identifying bottlenecks, manual dependencies and operational disconnects that slow down the execution of the business. Rather than replacing infrastructures, the goal is to build **layers capable of automatically coordinating how a commercial decision impacts the entire chain.**

In this way, the brand builds an organization capable of responding continuously to market changes.



From information to decision

From decision to market

From local to systemic

5

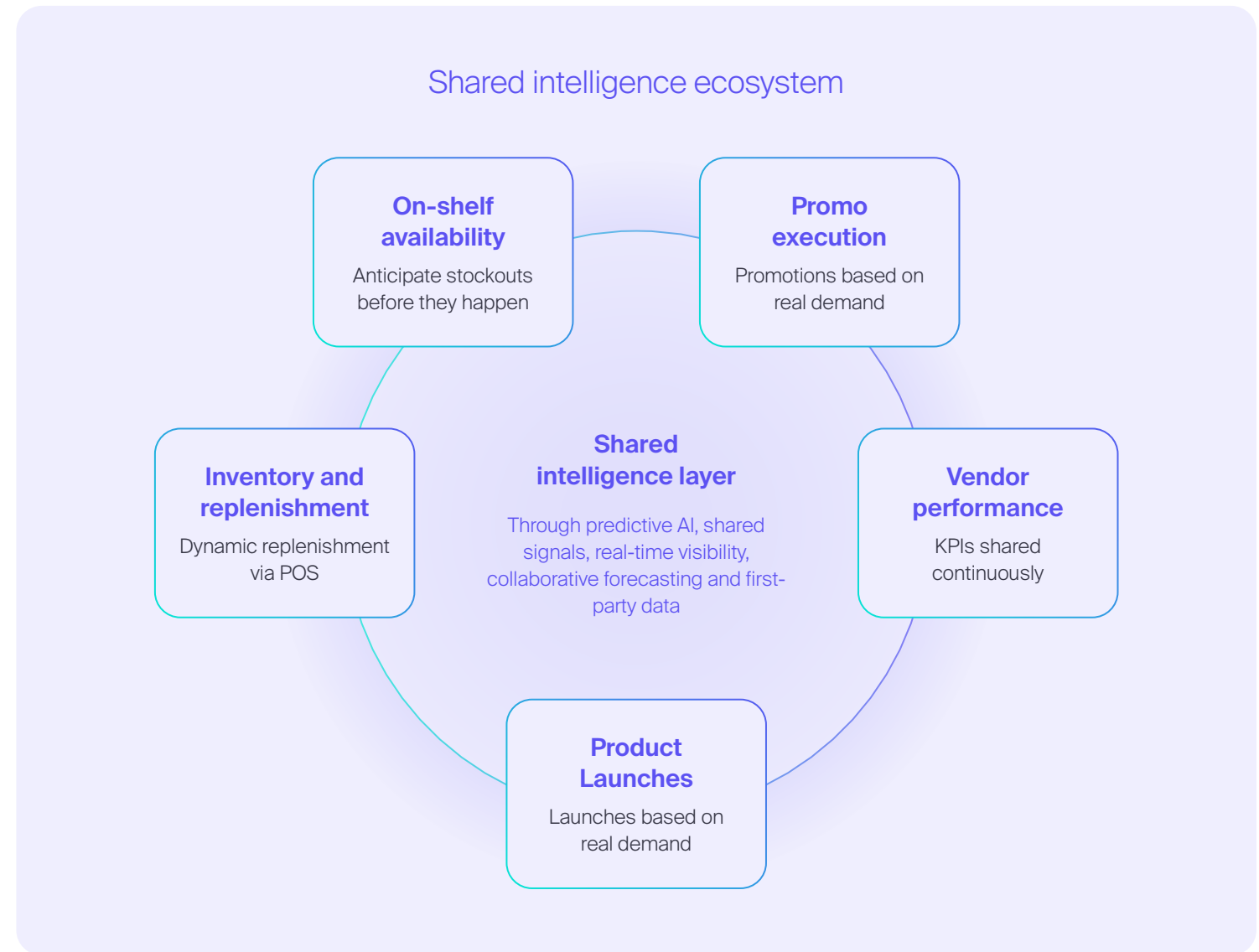
Share intelligence across retail and CPG ecosystems

Once retailers and CPG companies manage to operate with synchronized signals, decisions and execution, the next challenge becomes **how to extend that intelligence beyond the internal boundaries of each organization**.

In agentic commerce models, the decisions that impact demand, availability or profitability can no longer be optimized from within the retailer, because they **simultaneously depend on capabilities controlled by manufacturers, logistics platforms and commercial partners**.

This forces an evolution from traditional models of periodic negotiation toward **shared intelligence systems capable of coordinating signals, decisions and commercial investment continuously over time**.

Collaboration thus begins to function as a shared layer where the retailer provides real-time signals of behavior, conversion or availability, while the manufacturer contributes production capabilities, trade intelligence or supply planning. Thus, they will be able to **better optimize margin, stock and growth** within increasingly automated commercial ecosystems.



From information to decision

From decision to market

From local to systemic

6

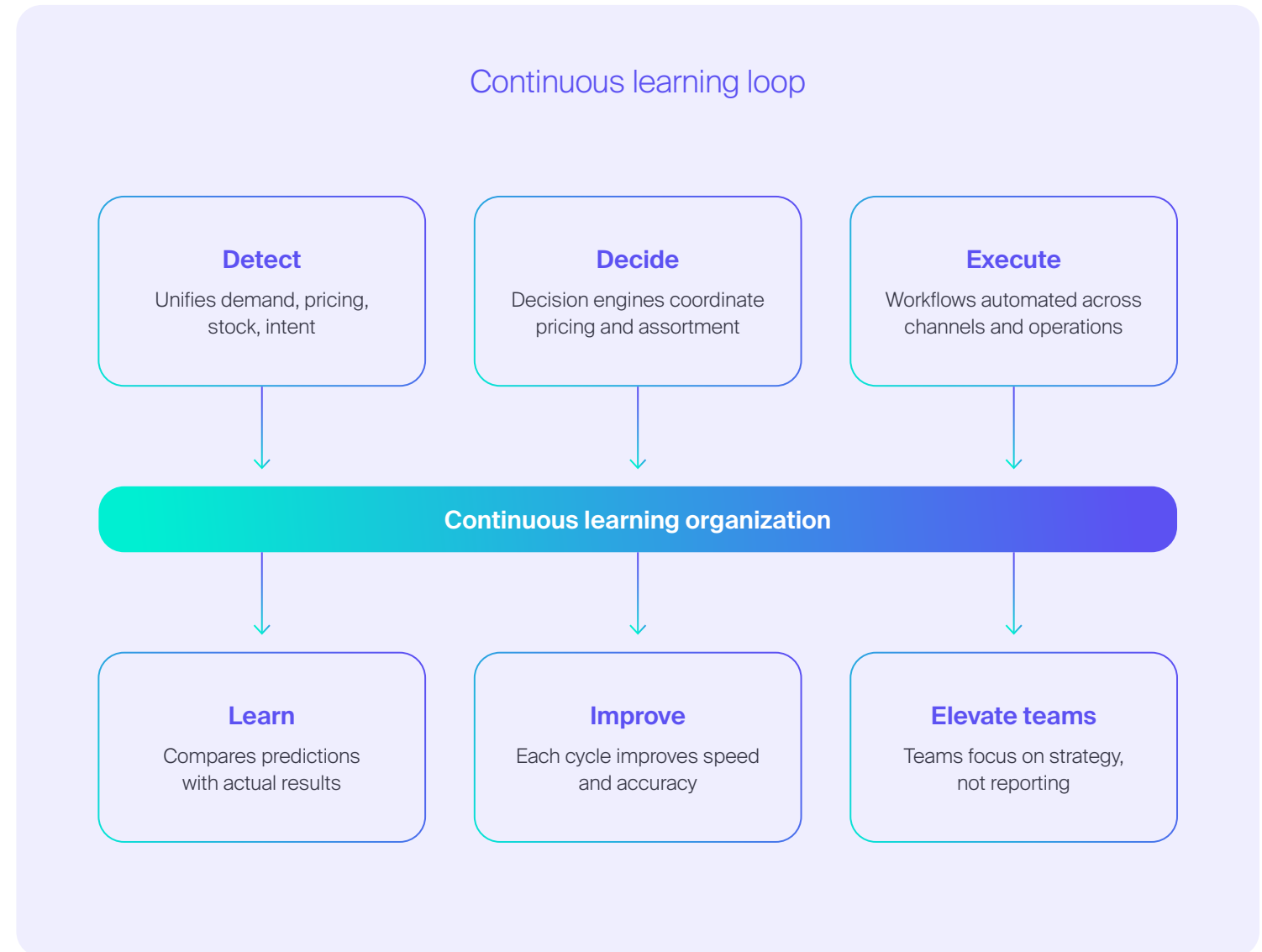
Create organizations capable of continuous learning

To complete this transition toward adaptive models, companies need to build organizations capable of learning from every executed decision, enabling **the commercial system to improve continuously based on real demand, consumer responses and the results obtained** in production.

The system **compares predictions** against real results, **identifies deviations, detects emerging patterns and readjusts** rules, priorities or recommendations without relying on periodic manual reviews.

To enable this capability, organizations need to implement **continuous feedback architectures capable of capturing operational and commercial outcomes**, monitoring model behaviors, measuring incrementality and feeding outcomes back into decision engines within a governed framework.

As the friction associated with manual reporting disappears, conversations between teams and departments stop focusing on interpreting information and shift to **prioritizing strategic decisions, innovation and growth**.



Competitiveness will increasingly depend on the capacity for continuous adaptation

A retailer that adopts this operating model will be ready to compete in the new agentic markets

by redesigning how commerce interprets signals, coordinates decisions and executes actions within an environment where consumer demand is increasingly mediated and influenced, while commercial decisions are progressively executed by intelligent agents.

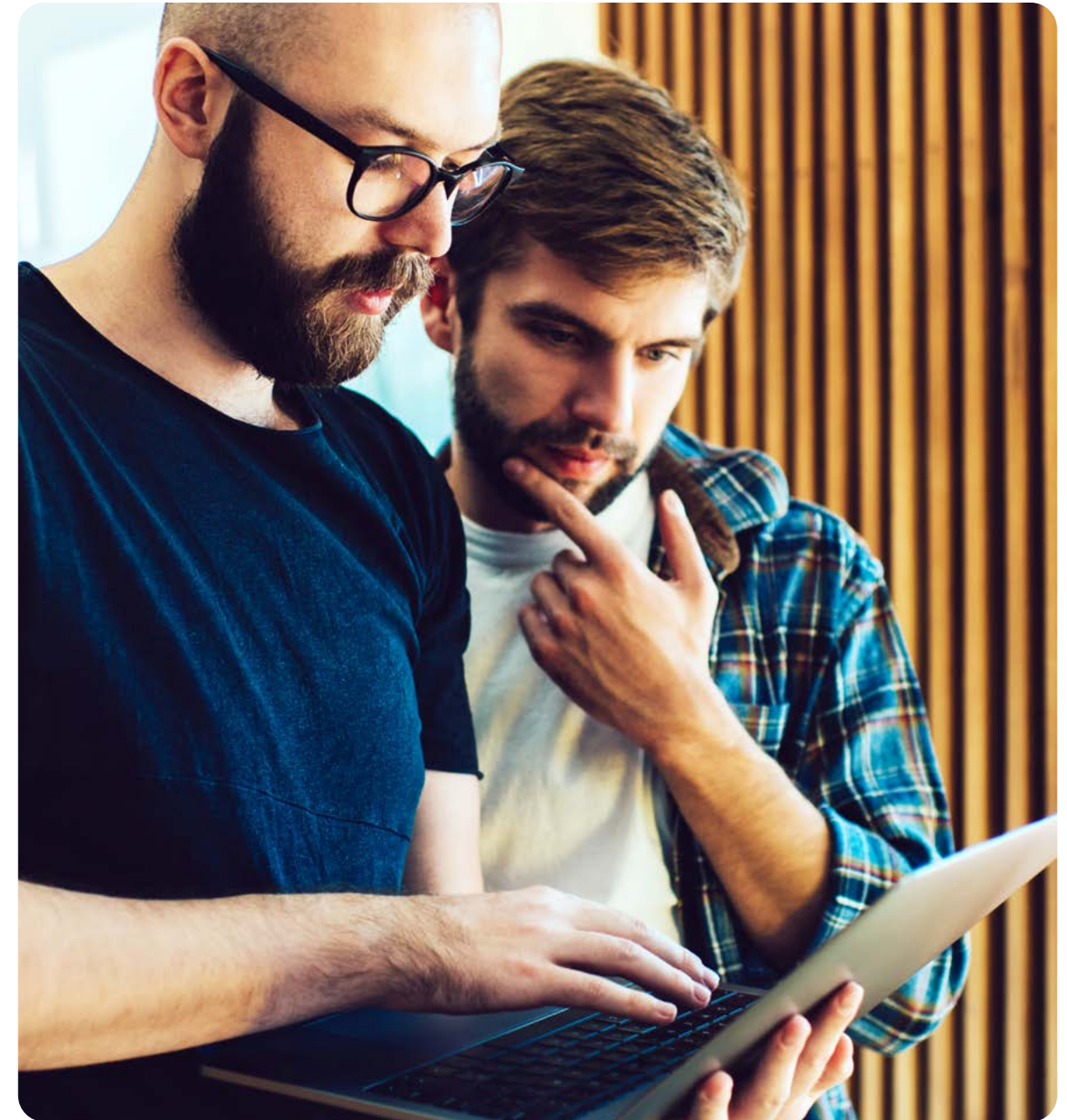
The six previous steps come together to create a new commercial system capable of connecting different commercial signals through a continuous cycle of decision-making and learning. This allows the business to stop reacting late to market changes and **begin operating on live context, dynamically adjusting prices, commercial activations, availability or stock allocation based on real intent and changing environmental conditions.**

This architecture also creates the conditions needed for **retailers and manufacturers to begin integrating brand agents within agentic commerce ecosystems**, since **intelligent agents will not interact efficiently with fragmented organizations**, manual processes or outdated data.

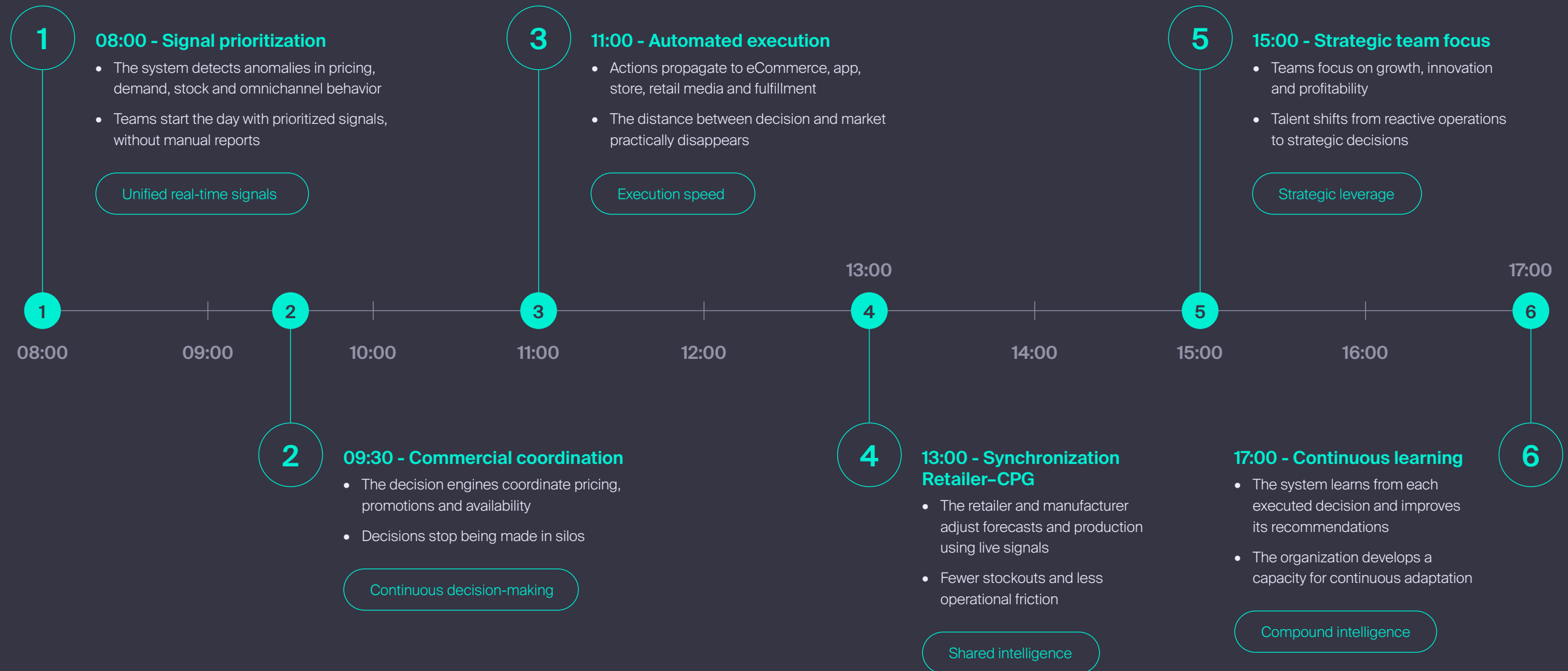
To do so, they need interoperable capabilities, traceable decisions, automated workflows and systems capable of responding in real time. In this sense, **building an agent-ready organization not only improves internal efficiency, but also enables active participation in future environments** where discovery, recommendation and transaction will be increasingly mediated by agents.

As these capabilities mature, organizations will also begin to **redistribute time and talent**, progressively shifting teams' focus from reactive tasks toward higher-value strategic work.

As a result, in AI-mediated environments, competitiveness will be measured by who manages to **turn commercial capabilities into organizational speed, operational coordination and continuous learning.** The players that will win will not be the largest, but **those capable of adapting, deciding and executing faster than the rest of the market** without losing control, governance or profitability.



A day in the life of an agent-ready retailer



Commerce is going
always-on: a network
of agents interprets,
coordinates and acts
without interruption



Agents connect commercial operations end-to-end

Until recently, **commercial automation has been limited to chatbots, recommendation engines or isolated flows aimed at solving specific tasks.** Although efficient at automating certain points of the customer journey, these systems still relied on fragmented processes, preconfigured rules and manual coordination across commercial functions.

The recent evolution of foundation models, together with open protocols, is beginning to transform that operational logic. Agents stop acting as independent assistants and begin to operate as an **interoperable network of specialized capabilities able to share context, coordinate decisions and execute complete end-to-end workflows.**

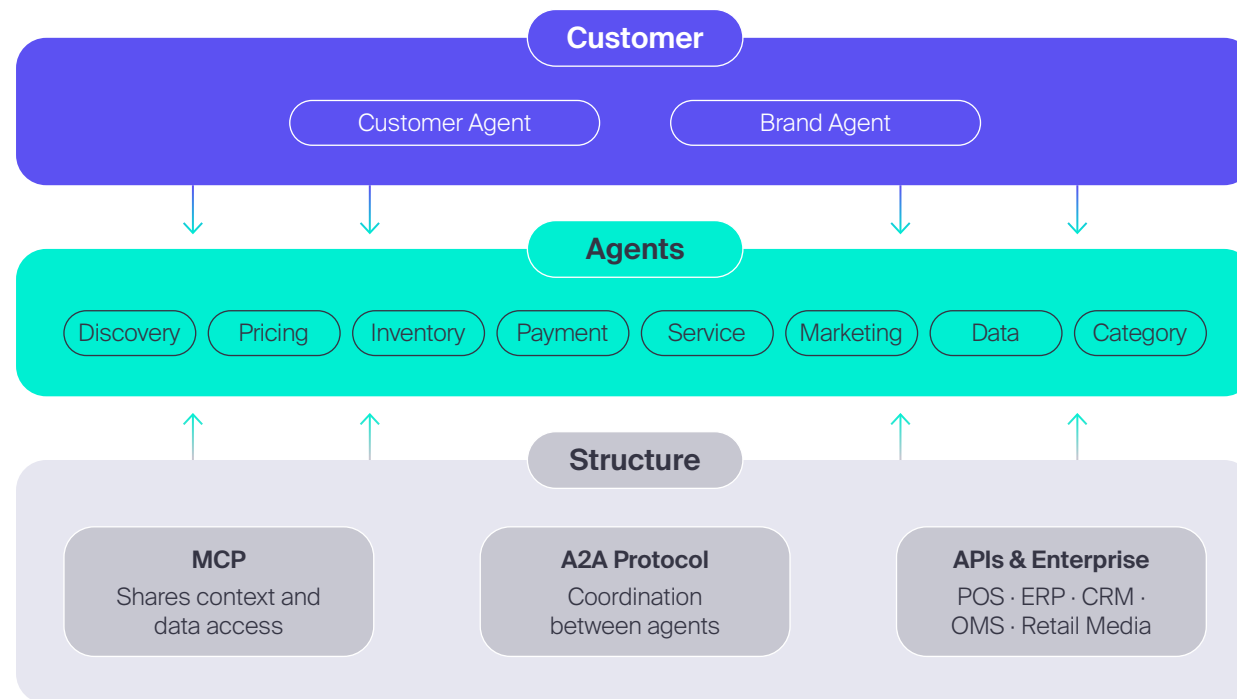
Companies that have transformed their operational layer can integrate into this new agentic ecosystem. This implies evolving from infrastructures designed to support digital channels toward **architectures capable of feeding, coordinating and responding to external and internal agents in real time.**

The customer journey thus stops being orchestrated manually through interfaces, campaigns or static rules and **begins to depend on dynamic collaboration among multiple agents** capable of interpreting intent, negotiating commercial priorities and synchronizing decisions on pricing, promotions, assortment, fulfillment, payments or after-sales support.

In this environment, the customer agent emerges as the **new primary decision interface, acting as the consumer's digital representative and constantly coordinating** with brand agents, category agents, pricing agents or fulfillment agents belonging to the retailer, the manufacturer or third parties in the ecosystem.

The commercial experience thus stops being built around a single channel, marketplace or specific application, and begins to depend on **how multiple agents collaborate and exchange context continuously within interoperable ecosystems.**

Retailers able to coordinate this distributed intelligence layer will be able to **capture commercial intent with much greater precision, reduce operational friction and deliver experiences** significantly more adaptive, predictive and automated.



The digital assembly line redefines how eCommerce operates

In practice, eCommerce evolves toward a **digital assembly line: a coordinated system of specialized agents where the different commercial capabilities operate as a unified**, permanently active layer. Just as an industrial assembly line distributes functions across different coordinated systems, the agentic ecosystem distributes commercial capabilities across agents able to collaborate, exchange signals and execute synchronized decisions continuously.

Thanks to the prior operational transformation, the organization can function as a **distributed intelligence layer where different agents interpret dynamic signals of demand, context** and customer intent to automatically coordinate commercial, operational and logistical actions in real time.

Therefore, it is no longer enough to have APIs connected, an optimized digital catalog or efficient campaigns for specific channels. Competitiveness begins to depend on the ability **to build agents able to operate within external ecosystems, continuously interacting with customer agents, intelligent marketplaces, conversational platforms and other automated systems** that are beginning to mediate the commercial relationship.

The digital assembly line process



The more autonomous commerce becomes, the more critical governance becomes

This new multi-agent ecosystem to which retailers and CPG companies will need to adapt creates a new situation, both strategic and structural, for commerce. **Those players able to modernize their infrastructure, governance and operational capabilities will be able to capture significant advantages within this new environment.** Agents will make it possible to operate on commercial intent in real time, automate contextual decisions and build much more adaptive, persistent and predictive experiences.

This opens both opportunities and new operational and strategic tensions for retailers and manufacturers. Competitiveness within a-commerce, beyond depending on digital presence and operational scale, will require the capability to build trustworthy, interoperable and coordinated ecosystems able to operate continuously. The more autonomous commerce becomes, **the more critical it becomes to ensure trust, control and governance over every interaction, decision and automated flow within the agentic ecosystem.**

Opportunities

- 1 **Continuous contextual conversion**
Agents adapt recommendations, promotions and bundles based on intent, context and behavior in real time.
- 2 **Persistent engagement**
Commerce evolves toward continuous relationships driven by automatic reordering and permanent recommendations.
- 3 **Scalable operational automation**
Pricing, promotions, inventory and fulfillment can be coordinated automatically across systems and agents.
- 4 **New monetization models**
Retailers will be able to monetize data, contextual retail media and specialized agents within the ecosystem.
- 5 **Competitive advantage based on coordination**
Companies able to coordinate data and workflows in real time will react faster to the market.

Risks

- 1 **Loss of control over the experience**
Interactions no longer take place exclusively within owned channels and becomes mediated by external agents.
- 2 **Algorithmic commoditization**
Brands with little differentiation may end up competing solely on price and availability.
- 3 **Dependence on external interoperability**
Commercial capability begins to depend on shared standards and ecosystems not directly controlled.
- 4 **Governance and accountability risks**
Automation forces a redefinition of accountability, auditing, consent and human oversight.
- 5 **Erosion of consumer trust**
Users will only delegate decisions if there is transparency, security and control over their data.

Commercial autonomy
will scale only when every
decision can be explained,
audited and stopped
in time



Autonomy introduces a new way to lose control

The autonomy introduced by agentic commerce **creates**, beyond a new way to buy, a new way to lose control. The more capable agents become at interpreting intent, coordinating decisions and executing commercial actions autonomously, the larger the risk surface that retailers and CPG companies must govern operationally.

The logic of the ecosystem changes completely when **decisions stop being made within linear, manually supervised systems** and begin to be executed among multiple specialized agents that continuously interact with one another.

In practice, this introduces new layers of operational complexity that did not exist before. The retailer no longer needs to validate whether a model works technically; it needs to **understand how the entire ecosystem behaves when hundreds of automated decisions begin to influence one another**.

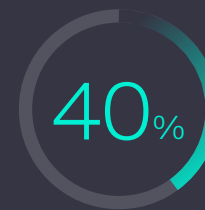
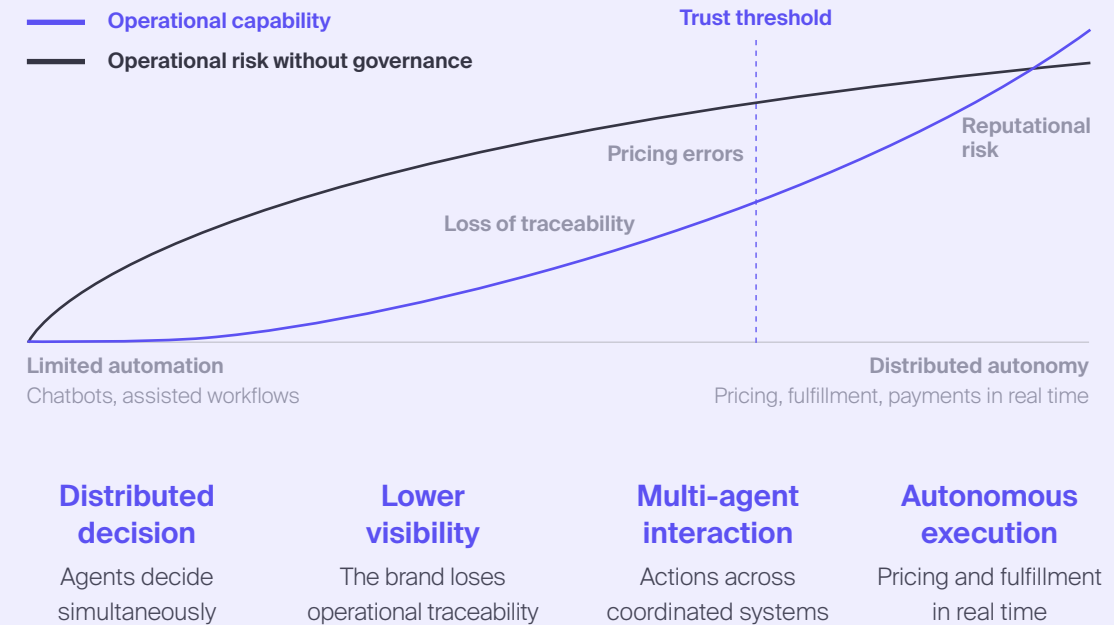
The difficulty arises because these decisions are no longer executed as visible, sequential workflows. **They happen in a distributed, opaque and coordinated way among systems that operate at machine speed.**

Therefore, **the scalability of agentic commerce will depend largely on the level of control organizations can maintain over their agents**. This control is essential to guarantee the traceability, explainability and auditability of the multi-agent ecosystem.

This change forces the introduction of a trust architecture designed specifically for these environments. Agents will need to **operate under explicit permissions, action limits, verifiable rules and mechanisms** capable of recording which decision was made, why it was made, which signals were used and under which authorization the agent operated.

In this context, **concepts such as explainability, verifiable consent, observability, identity orchestration or human oversight** stop belonging to the technological or regulatory domain and become **a direct part of the business's commercial architecture**.

Operational risk vs. Agentic autonomy



of agentic AI projects will be canceled before 2027 due to problems related to governance, control and scalability

Trust must be designed within the operational architecture

Trust in multi-agent ecosystems is not built **by adding controls at the end of the system, but by designing an operational architecture from the outset that enables autonomy without sacrificing traceability**, oversight or intervention capability. Companies need to ensure that every decision can be understood, governed and audited within an environment where execution occurs continuously and in a distributed manner and at machine speed.

The market is already delegating decisions to intelligent agents. Retailers that win will be those that evolve from fragmented operations **toward interoperable ecosystems where pricing, inventory, recommendations and fulfillment function as a continuous decision-making system**. But this integration is only the first step.

What separates the winners is the **ability to build trust in** multi-agent ecosystems: verifiable data, transparent rules, signed authorization and full traceability of every commercial decision. Those who manage to coordinate operational speed with rigorous governance will be able to capture customer intent in real time without losing control, profitability or brand. The rest will be left behind.

How to build trust in multi-agent ecosystems



Permissions and limits

Define what each agent can execute, over which categories, under what thresholds of spend, margin or operational context. Autonomy must be bounded by design through verifiable and scalable policies.



Real traceability

Record which agent acted, which signals it used, which action it executed and under what authorization. Auditability stops being a compliance layer and becomes part of daily commercial operations.



Brand control

Allow agents to automate decisions without losing control over pricing, claims, promotions, catalog or brand experience. The company must continue to define rules, limits and strategic objectives.



Human oversight

Not all actions require manual validation, but they do require clear mechanisms for override, escalation and review for sensitive operations such as payments, mass pricing changes or regulatory decisions.



Infrastructure governance

Agents need to operate on secure APIs, reliable data, verifiable identities and connected systems able to share context in real time without compromising security or operational consistency.



Consumer transparency

Users must be able to understand how their data is used, why they receive certain recommendations and what level of autonomy they are delegating. Trust will depend on making the ecosystem's operation visible, not on hiding it.



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