Building for the AI Era:

A Playbook for Scaling Business Intelligence

How to shift from fragmented systems to connected intelligence that flows where work happens

Introduction

Every day, Slack works with companies around the world to shape our roadmap and understand how work actually happens. This year, as organizations navigated the shift to agentic work, one challenge surfaced again and again:

> **We've deployed AI everywhere, but our organization feels less intelligent than before.**

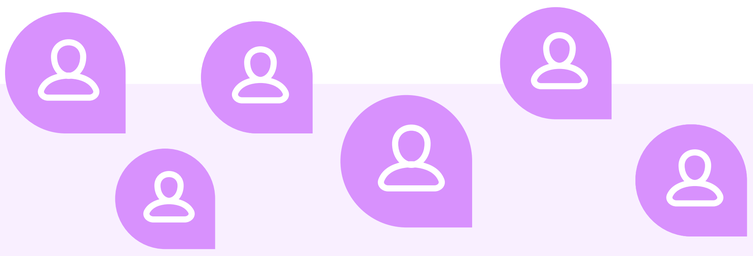
These are sophisticated companies with ambitious visions for human-AI collaboration. They've run the pilots, built the prompts, and invested in success. They have AI solutions for front- and back-office: from operations and finance to service and sales. They've deployed, trained, and are using the latest AI agents across functions. Each generates valuable insights and takes action on specific tasks. The problem? Their AI agents generate isolated intelligence, and that isolation only deepens existing silos.

Operational systems now have their own AI, developing compound intelligence trapped within them:

- A **service agent** gets smarter about service patterns, but that intelligence never reaches the product team
- A **sales agent** learns about customer objections, but operations never sees it
- A **finance agent** spots budget risks, but strategy remains blind until it's too late

The solution isn't more technology.

The systems exist. The data exists. Intelligence is being generated and transformed through CRM into customer-centric insights.



What's missing is the destination – the place where intelligence reaches people at the moment of action.

Instead, intelligence follows a legacy pattern of fragmentation. It remains locked in discrete systems, forcing teams to swivel between applications, manually piecing together what they need. An account manager checks CRM, logs into the service platform, reviews analytics, scans finance dashboards.

Introduction (continued)

By the time they've gathered context, they've lost an hour to context-switching and still have incomplete intelligence.

Traditional enterprise architecture can't see this problem. Most look at what technology they have first, rather than understand what outcomes the business needs to achieve.

But value runs the other direction. Starting from outcomes first will allow businesses to map their systems, data flows, and integration points to scale intelligence more fluidly and efficiently through their organizations.

This playbook was designed to help you start from outcomes, map backward to architecture, and build the connective tissue that turns fragmented AI investments into coordinated organizational intelligence.

Thank You

Peter Doolan
Chief Customer Officer, Slack

Over the past year, my team listened closely to our customers about how work is changing. What we heard was consistent: the promise of AI is real, but so is the frustration. While intelligence is being generated everywhere, it’s often not reaching people where they actually work or when they need it most.

We created this playbook because the pattern kept repeating, but the solution wasn’t always clear. It requires stepping back to see how intelligence flows (or doesn't) across your organization.

The frameworks and questions in this practical guide have helped our most sophisticated customers close the gap between AI investment and impact. We hope it helps your organization do the same. Thank you for taking the time to read it.

How to Use This Playbook

This methodology is grounded in hundreds of customer conversations. You'll find frameworks to guide thinking, questions that quickly pinpoint gaps, and direction on where to start – not prescriptive recipes. Every organization's intelligence flow breaks down differently. The goal is to help you spot the weaknesses so you can build an organization that's actually smarter than the sum of its systems.

PART ONE

Where Intelligence Gets Blocked at Work

Map the five friction points blocking intelligence flow and how they compound each other.

PART TWO

The Three-Layer Framework of Intelligence Flow

Understand how Slack's open architecture provides an essential foundation, powering connected intelligence across your business.

PART THREE

Start Building Intelligence Flow

Use the companion worksheets to diagnose gaps, map decisions, and pilot solutions.

You have the data. You have the infrastructure. You're missing the place where it converges and reaches humans in their flow of work.

Ready to get started? Let's begin.

PART ONE

Where Intelligence Gets Blocked at Work

Through innovation summits and working sessions with customers across industries and markets, five friction points emerged consistently. **Many organizations face all five, compounding negative effects.**

Friction Point 1:

Structural Silos

Your org chart is a map of where intelligence stops flowing. Every departmental boundary creates an invisible wall. Customer support knows things the product team doesn't. Sales understands market dynamics that operations never sees. Finance has insights that never reach strategy.

When you deploy AI agents into this structure, you encode the problem in software. Your customer service AI agent becomes brilliant at service patterns but blind to product implications. Your sales AI agent optimizes for deals without knowing operational constraints. Each AI agent masters its domain while gaps between domains widen.

> **Our company's collective knowledge is our greatest asset, but it's trapped in silos. Slack is the key to unlocking that knowledge and putting critical insights into the hands of our teams right when they need them.**

Sr. Executive Healthcare Company,
Slack Customer Advisory Board, 2025

Friction Point 2:

Tool Sprawl

Each department buys tools to solve its visibility problem. Each tool solves a specific problem. Each one creates legacy debt from integrations.

Organizations accumulate dozens of systems – specialized tools for marketing automation, sales enablement, customer success, analytics, operations management. What starts as "we need better visibility into X" accumulates into a portfolio of disconnected tools that must somehow coordinate.

Each new tool makes connections exponentially harder to maintain. Integration projects multiply.

Teams have the infrastructure but can't activate its full potential because tool sprawl has fragmented everything.

Friction Point 3:

Data Fragmentation

Even when systems technically integrate, the data doesn't speak the same language.

Your CRM calls it a "lead." Your marketing automation calls it a "prospect." Your sales enablement platform calls it an "opportunity." Your support system calls it a "customer." Same human, four different identities, no shared history.

This becomes a critical coordination challenge that surfaces whenever humans or agents need context spanning systems.

Which customer segment drives profitability? That requires connecting CRM data, service interaction history, fulfillment costs, and payment behavior – all defined differently across systems.

AI amplifies this problem. Your agents generate content that appears sophisticated on the surface, but lacks true substance because they couldn't access the context they needed. Intelligence moves quickly within systems but degrades completely at system boundaries.

Workslop

/ˈwərk-ˌsläp/ *noun*

AI-generated content that creates the illusion of progress without true substance.

**BetterUp/Stanford Social Media Lab, September 2025*

40% of U.S. desk workers reported receiving workslop last month*

2 hours
Average time spent resolving each incident of workslop*

Friction Point 4:

Process Rigidity

Your workflows were designed for human-to-human coordination. They don't work when agents need to participate.

> **Our teams need to be able to make decisions where they are working, so the work doesn't slow down. But we break for formal approval meetings, chase down an approver, and break momentum.**

Sr. Executive, Global Financial Services Company,
Slack Customer Advisory Board, 2025

Now layer agents into that same rigid structure. In theory, agents with proper guardrails could handle decisions instantly – but they're stuck waiting in those same queues. The strategies developed to ensure consistency have become the bottleneck. Everyone is waiting. Everyone is still checking a disconnected system before work can move forward. The rigidity designed for accountability now prevents the fluid coordination that intelligence flow requires.

Here's what we kept hearing: even when organizations fix the first four friction points – integrate systems, harmonize data, streamline their tech stack and processes – intelligence still doesn't flow. There's one more place it breaks down.

Friction Point 5:

Work Layer Fragmentation

Even with better infrastructure, intelligence still doesn't reach humans when they need it.

We know from Slack research that knowledge workers switch between 10+ applications daily. To make a decision, they check Salesforce for customer history, log into ERP (Enterprise Resource Planning) for operational constraints, and review analytics dashboards. When coordination spills into email, context erodes further, creating micro-silos and often forcing a meeting just to realign. By the time they've gathered what they need, they've lost significant time to context-switching and still have incomplete information.

This compounds when multiple agents need to coordinate. Your service agent identifies a customer issue. Your sales agent knows renewal timing. Your operations agent understands capacity. Your finance agent has profitability data.

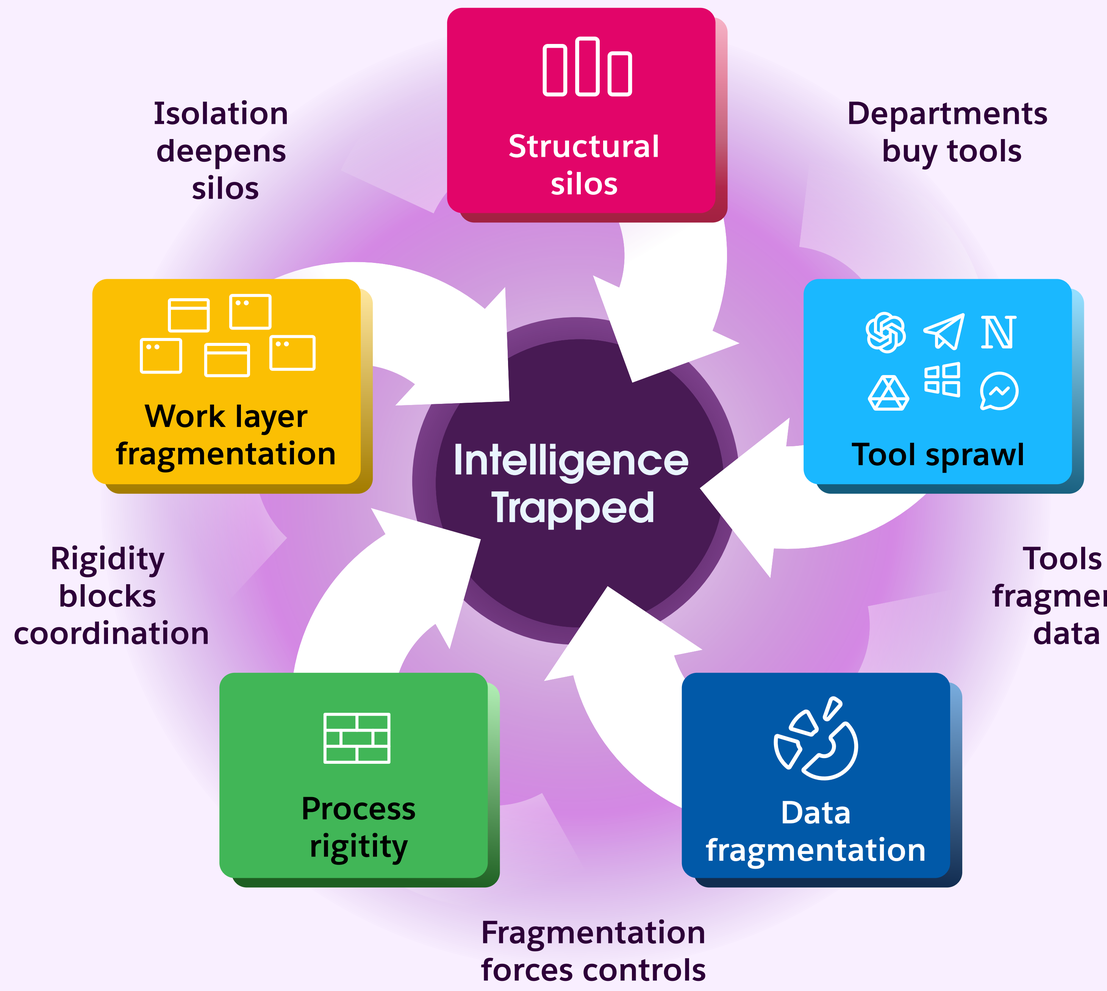
Where do agents coordinate? In many organizations: nowhere.

Worse, most AI today is a "single-player" experience, curating answers for individuals based on their individual context, data, and permissions. The result is a familiar problem amplified: two people show up to a meeting with two different answers that should be the same. Instead of solving the problem, they argue about whose data is wrong. As AI scales, this pattern creates "organizational echo chambers," everyone operating from their own version of the truth.

Each agent operates within its own system. Humans bounce between email, apps, and data sources attempting to bridge gaps and stitch information together, but the context between these signals erodes with every switch, creating micro-silos instead of team alignment. This missing connective tissue forces more meetings and manual alignment just to keep work moving. As business evolves, agents trapped in isolated tools become increasingly ineffective because they're unable to see across systems, access shared context, or understand the last decision made, leaving them unable to take the next best action.

How these friction points compound

You're not facing five separate problems you can solve sequentially. You're facing a system where each friction point reinforces the others.



Structural silos mean each department buys and implements tools. Tools create data fragmentation because each defines entities differently. Data fragmentation forces rigid processes – you need approval gates and validation steps to ensure consistency. Rigid processes reinforce silos – departments can't coordinate fluidly when everything requires formal handoffs. And all of this happens while employees work across fragmented applications, constantly context-switching to piece together what the organization knows.

The cycle feeds itself. More silos, more tools. More tools, more fragmentation. More fragmentation, more process controls. More controls, deeper silos.

And through it all, intelligence piles up in systems while humans hunt for it.

The Root Cause: Intelligence Has No Single Destination

These five patterns are symptoms of a single structural problem: there's no place where intelligence from across your enterprise surfaces with purpose, where work happens.

Intelligence lives in systems. Humans work somewhere else. The gap between those two points is where value erodes.

Traditional architecture shows you how to integrate systems, harmonize data, and automate processes. But it doesn't close the gap.

Teams still hunt for intelligence across applications because there's no layer where it all comes together.

The difference between organizations that feel intelligent and those that don't comes down to proximity: how close intelligence is to where humans actually work.

PART TWO

The Three-Layer Framework of Intelligence Flow

Where work actually happens

Here's what customers tell us: they have collaboration platforms connecting people across floors, offices, and time zones. They believe they've solved the work layer problem.

The reality looks different. "Let me check Workday and get back to you." "I'll pull that report and share it here." The conversation occurs within the platform, but the intelligence lives elsewhere. Someone leaves, retrieves it, brings it back.

They're messaging about work, not *actually* working.

That gap between how work should flow and how it actually happens is what reveals the truth. Architecture diagrams prescribe workflows. Actual work lives in channels, threads, and conversations where decisions get made and context accumulates.

This work layer is the long-term memory of the business – the living corpus of knowledge that evolves with every interaction. In the Intelligence Era, it becomes something more. At Slack, we call it the Agentic OS: the operating system where humans and AI work together, where intelligence surfaces at the point of decision, and where the gap between "how work should flow" and "how it actually happens" finally closes.

> **I may know how work should be done, but you know how work is actually being done. No one understands the meta-structure of work better than Slack.**

CHRO Global Staffing Company, Slack Customer Advisory Board, 2025

Intelligence value correlates directly with proximity to work.

The Proximity Principle

The closer intelligence is to where work happens, the more it gets used. The further it sits, the more it degrades into unused potential. The proximity of the work touchpoint is the key to unleashing collective intelligence.

Consider two scenarios:

Scenario 1:
Your sales agent generates intelligence about customer objections. That intelligence lives in your CRM system. To access it, your product team logs into Salesforce, navigates to the report, interprets the data, and brings it back to their roadmap discussion.

Scenario 2:
That same intelligence is surfaced directly in the Slack channel where your product team is prioritizing the roadmap. In context. In real-time. In the conversation where the decision is happening.

Same intelligence. Same agent. Different proximity to work.

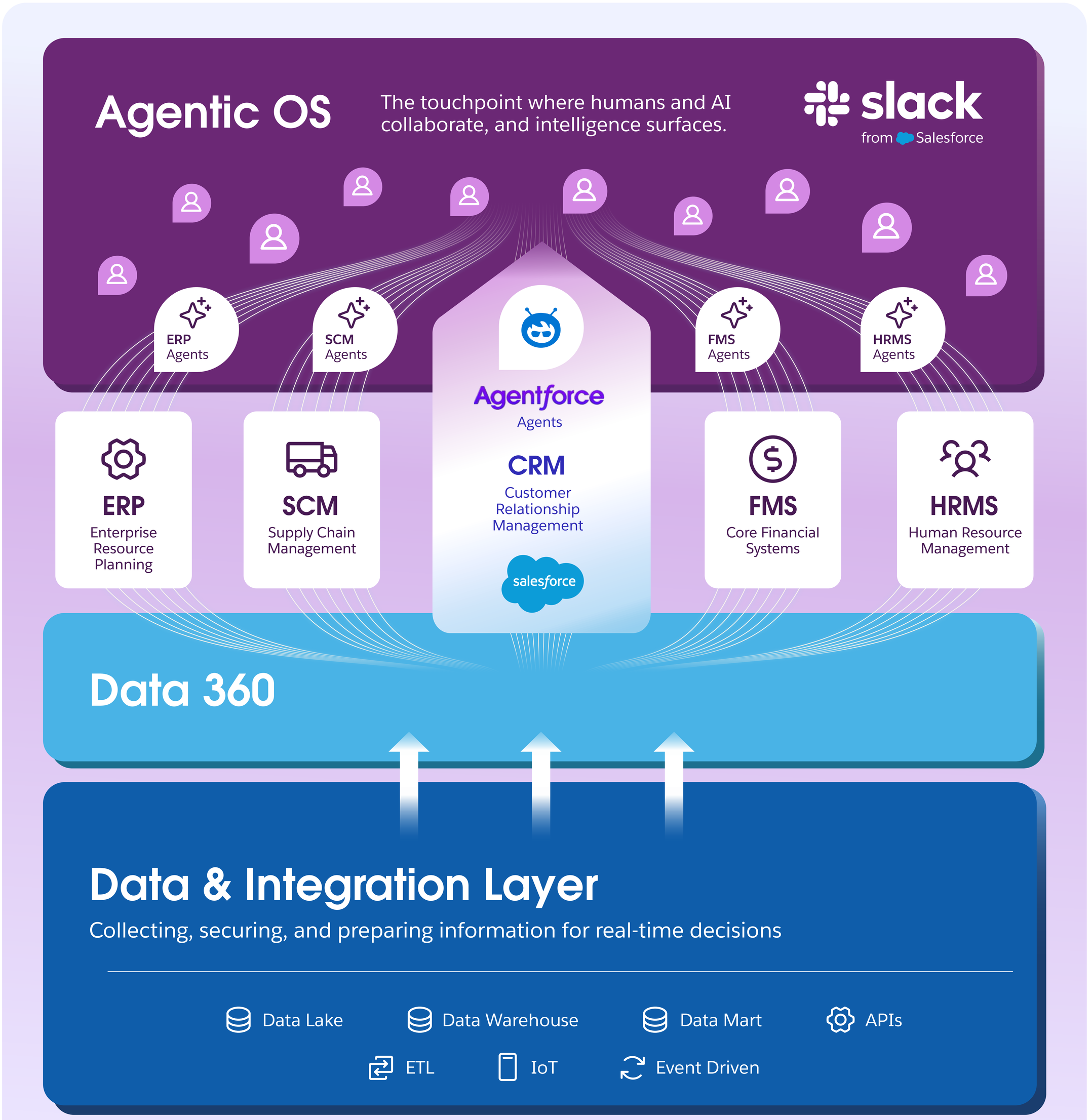
In the first scenario, the intelligence might get used if someone remembers to look for it. In the second, it gets used because it's already there. Intelligence that requires humans to retrieve it competes with everything else demanding attention. Intelligence that surfaces where humans are already working becomes automatic.

Bottom line: Where intelligence surfaces matters more than how sophisticated it is.

The most advanced AI generating brilliant insights creates no value if those insights live in a system humans have to remember to check.

The Three-Layer Framework

When you map how intelligence actually flows through an organization, you see three layers. Most organizations have invested in all three. **What they haven't done is configure them to work together.**



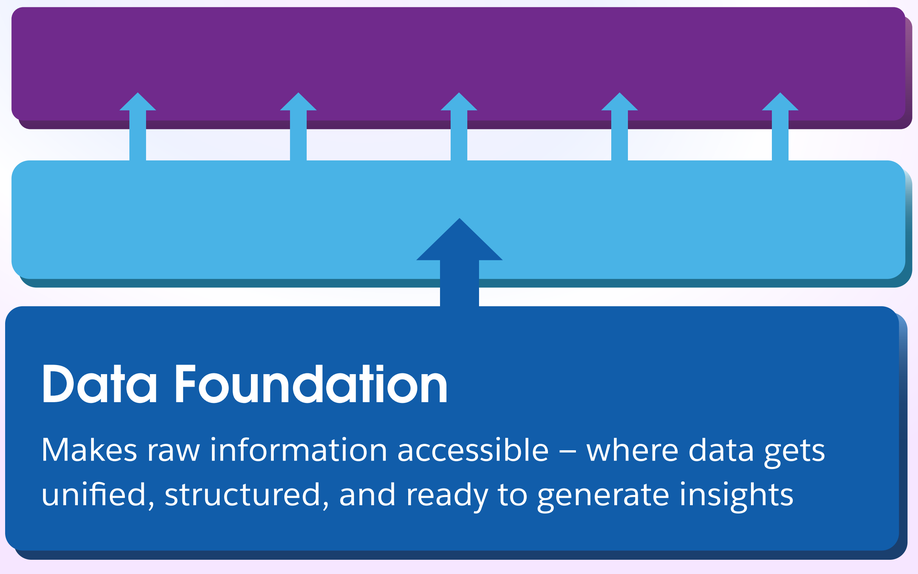
Layer 1:

The Data Foundation

Where Intelligence Takes Form

Your data foundation makes raw information accessible – lakes, warehouses, and integration platforms where data gets unified, structured, and ready to generate insights.

When this works, intelligence starts clean. Information is current, connections are visible, and teams can access what they need. When it doesn't, data sits fragmented across sources, updates lag behind reality, and friction begins before intelligence even starts to move.



But even functioning foundations only create potential. Raw data sits inert until something transforms it into context humans can act on.

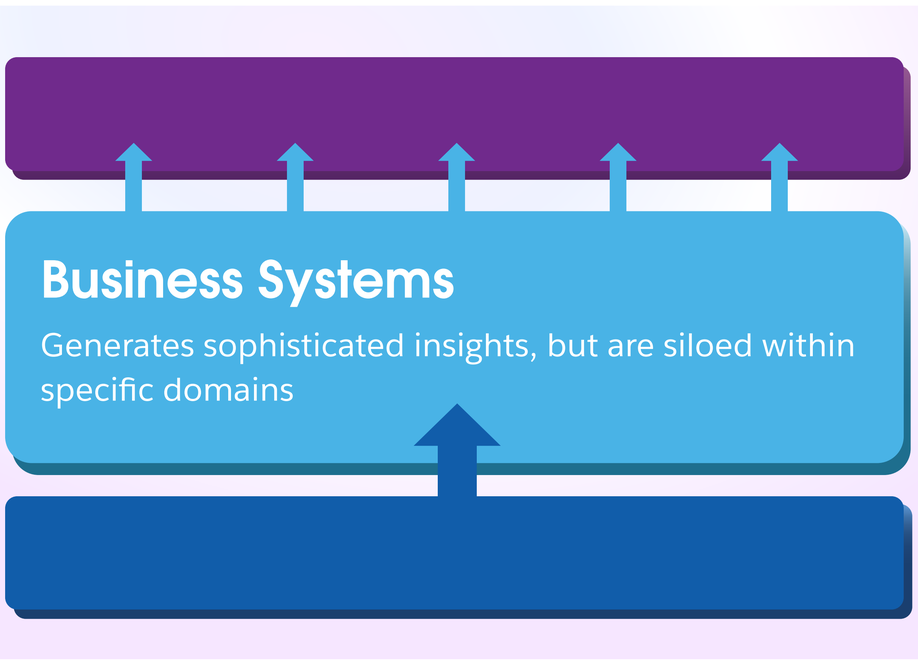
Layer 2:

Business Systems

Where Intelligence Gains Meaning

Your business systems generate insights within specific domains. ERP manages resources. Supply chain coordinates logistics. Finance tracks transactions. HRMS handles talent. Each is sophisticated within its boundaries.

This is where most organizations hit their first major constraint. These systems speak different languages. ERP thinks in resource allocation. Supply chain thinks in lead times and inventory. Finance thinks in budget variance. They generate intelligence within domains but can't coordinate across them because there's no common reference point.



CRM either constrains or enables the entire network at this point.

For example, when any platform – including Salesforce – operates in isolation as just another operational domain, fragmentation persists. Customer data here, financial data there, operational data somewhere else.
No coordination.

But when Salesforce functions as the transformation pillar with Slack as the Agentic OS, it grounds everything against the customer's data.

This creates a common language that enables systems to coordinate – turning scattered data into contextualized intelligence.

- Your ERP knows "inventory count: 450 units." Salesforce translates that into "ability to fulfill the Hawksdale account order with 2-day delivery"
- Your finance system knows "budget variance: -$250K." Salesforce connects it to "margin compression on enterprise deals"
- Your supply chain knows "supplier delay: 3 weeks." Salesforce shows "delivery risk for top accounts"

This transformation is what makes cross-functional intelligence possible. It's not just about generating insights – it's about transforming how your collective business systems' intelligence becomes actionable.

ERP can now inform sales strategy. Supply chain constraints can shape account planning. Finance data can guide service priorities.

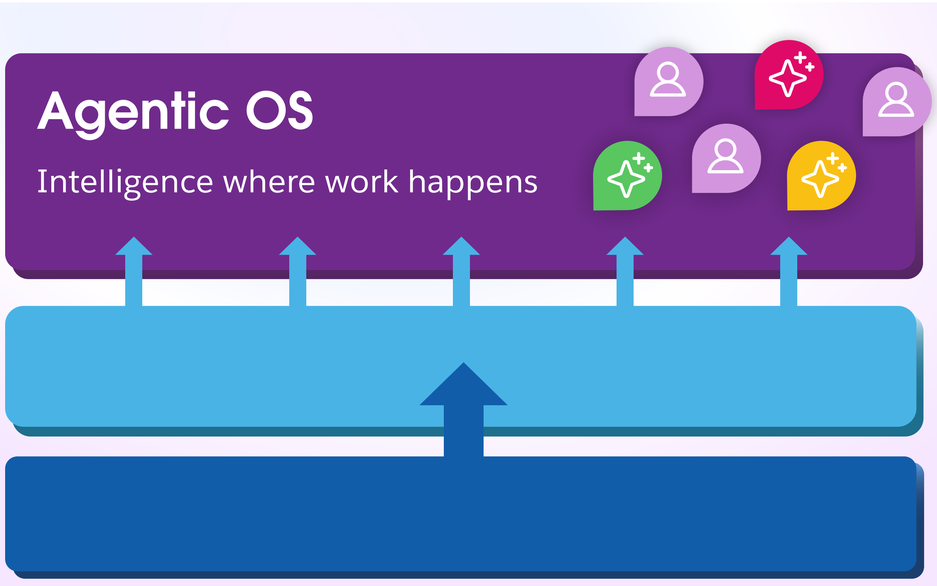
Without the ability to channel the data through the CRM pillar, what each system generates stays locked in domain-specific vs. customer-centric language. With it, context becomes coordinated, customer-centric, and ready to move.

But transformation alone doesn't create proximity. Intelligence has been made meaningful, but it still lives in places humans must visit to find it.

Layer 3:

Agentic OS

Where Intelligence Meets Work



Ideally, Slack is where teams coordinate, make decisions, and get their work done. This is where the biggest gap exists. Organizations may have a platform they use for collaboration. But they've configured it as a *communication* tool, not intelligence infrastructure.

Configured as a communication layer, the platform becomes another place to check. What teams need exists in other systems. People retrieve it and manually bring it into conversations. The platform requires human integration between disconnected sources.

Configured as an intelligence layer, the collaboration platform now enables flow.

This is the promise and potential of Slack, your Agentic OS for work. Intelligence from across your network surfaces automatically where teams work.

Service insights appear in renewal discussions without anyone checking systems. Financial constraints surface in planning conversations without anyone pulling reports. Operational capacity shows up in strategy sessions without anyone hunting for it.

This is the difference between communication infrastructure and an agentic operating system for work. One is a place to discuss what you found elsewhere. The other is where intelligence from your entire network surfaces in the flow of work.

Slack as Your Agentic OS

Only Slack can function as your Agentic OS, the connective tissue of your organization. Not just because of superior features, but because of what Slack fundamentally is: the place where work actually happens at scale, across your organization – no matter its size, region, or industry.

When Slack functions as your Agentic OS:

Adoption happens naturally. You don't need change management when agents appear where work already happens. Teams use them because they're there, not because they remember to visit another application.

Context stays intact. When intelligence surfaces in the conversation where decisions are being made, no one has to reconstruct context from memory or notes. The full thread of reasoning stays visible.

Speed increases. Decisions that used to require checking multiple systems and coordinating through meetings now happen in the flow of work because all the intelligence needed converges in one place.

AI agents coordinate automatically. When your service agent, sales agent, operations agent, and finance agent can all surface intelligence in the same workspace, coordination happens naturally rather than through a human orchestrating separate systems.

> **"We put it in Slack because that's where people already are. You shouldn't have to remember which portal to visit or hunt for the right URL — intelligence should just surface where the work happens.**

CIO of Major Global Technology Company, Slack Customer Advisory Board, 2025

At Salesforce, we've become Customer Zero for this vision. We've deployed agents across engineering, sales, and IT that work directly in Slack where teams spend their day:

18,000

support interactions handled by our Engineering Agent

25,000+

sellers helped with instant deal insights by our Sales Agent

The results are significant not because the agents are more sophisticated, but because they surface where our people are already working.

Your investments work for you or against you.

Most organizations have invested in all three layers of this framework. What they haven't done is configure them to work as a network that enables flow.

Intelligence originates but can't transform because operational systems don't coordinate. Or it transforms but can't reach people because the platform functions as communication infrastructure, not intelligence infrastructure. Or teams fail to find flow because people manually move information between disconnected systems.

Your investments work for you or against you. There's no neutral position. Either intelligence flows from origin through transformation to where work happens, or your systems create friction at every connection point.

Traditional architecture diagrams show you have the pieces. What they don't show is whether those pieces enable or prevent the flow of intelligence to where people work.

You can have sophisticated data foundations and powerful systems creating rich context. But if your collaboration platform isn’t configured as your Agentic OS, your systems prevent flow at the moment that matters most.

Slack can function as the Agentic OS – the operating system that enables flow from origin through transformation to where work happens.

PART THREE

Start Building Intelligence Flow

Transformation challenges everything about how organizations work – politics, culture, budget cycles, existing commitments. Some organizations can experiment quickly. Others need extensive proof before making changes. That's why we built a workbook that meets you where you are: diagnose first, then act.

Your Connected Intelligence Workbook

The following worksheets are designed to be printed and used with your team. Work through them in order – each builds on the one before.

If the first two parts of this playbook gave you the guidance, this appendix is your hands-on workbook. In it you'll find four valuable worksheets designed to help you and your team diagnose your structure, identify gaps, and pilot intelligence flow in your organization – starting this week.

These worksheets work for the highest-level decision maker scoping transformation from the office of the CIO. But they're equally valuable for practitioners – directors, managers, and team leads who translate strategy into action. You've seen where intelligence gets blocked. You understand the three-layer framework. Now it's time to do something about it.

Worksheet 1: Where Does Intelligence Get Blocked?

Pick a function, team, or business unit to assess. Rate how severely each friction point blocks intelligence flow. Identify how they reinforce each other. Find your highest-leverage starting point.
Time: 15 minutes

Worksheet 2: Trace One Critical Decision

Pick a decision that matters. Map what intelligence it requires, where that intelligence lives today, and how it currently moves (or doesn't) to where the decision gets made. This is where the gap becomes visible.
Time: 30 minutes

Worksheet 3: Assess Your Architecture

Evaluate whether you have the three layers needed for intelligence flow – and whether they're connected. Walk away with a personal evaluation and a clear view of what's missing.
Time: 15 minutes

Worksheet 4: Design Your First Flow

Take the decision you traced in Worksheet 2 and design a pilot. Define success, map what needs to connect, and build your hypothesis for what changes when intelligence surfaces where work happens.
Time: 30 minutes

How to Use These Worksheets

Print these worksheets. Gather your team. Work through the worksheets together in a 90-minute session to save room for discussion.

The shift from infrastructure that constrains to infrastructure that enables starts with seeing clearly. Diagnose where intelligence dies. Trace how it moves. Assess what you have. Then design one flow and make it work.

Begin with diagnosis. Learn what it takes. Build from what works.

WORKSHEET 1

Where Does Intelligence Get Blocked?

Purpose: Map where intelligence stops flowing in your organization

Time: 15 minutes

Output: Clear view of which friction points are blocking the flow of intelligence

The Five Friction Points

For each friction point below, rate how severely it blocks intelligence flow in your organization.

Scale: 1 = Minor issue → **5** = Severe blocker

Friction Point	Rating (1-5)	Specific Example
Structural Silos – Departments can't or struggle to share intelligence across boundaries		
Tool Sprawl – Too many disconnected tools create integration debt		
Data Fragmentation – The same entities are defined differently across systems, causing confusion and fragmentation		
Process Rigidity – Old workflows designed for humans are too rigid to accommodate agentic collaboration		
Work Layer Fragmentation – Intelligence doesn't surface where work happens		

How do friction points reinforce others?

Choose one friction point and map out how it contributes to another source of friction in your organization:

Example: "*Structural silos* → each department buys point solutions → creates *data fragmentation*"

Your friction point mapping:

Your highest-leverage starting point

Based on your ratings, which friction point:

Causes the most pain today?

Would unlock the most value if solved?

Is most feasible to address first?

Your starting point and why:

WORKSHEET 2

Trace One Critical Decision

Purpose: See how intelligence actually moves (or doesn't) in your organization

Time: 30 minutes

Output: Insight into improving the flow of critical intelligence for better decision-making

What decision are you mapping?

Pick a critical decision your team or organization makes repeatedly.

The decision:

Who makes it:

What intelligence is needed and where?

What intelligence is required to make this decision well? Identify where it lives today and where it needs to surface to optimize decision-making and collaboration.

Intelligence Needed	Where Intelligence Lives Today	Where it Needs to Surface

How can decision-making improve with the flow of intelligence?

Is there intelligence that should be shared but is missing from the current process?

Is intelligence living in multiple systems? Is there consistency on which system(s) to pull from?

How might you change the way intelligence is gathered and decisions are made to be more effective?

What are potential positive outcomes of making this change?

WORKSHEET 3

Assess Your Architecture

slack from Salesforce

Purpose: Evaluate whether you have the three layers needed for intelligence flow

Time: 15 minutes

Output: Identified gaps

Layer 1: The Data Foundation (Where Intelligence Takes Form)

Do you have a strong data foundation in place?

- [ ] Yes, we have a connected and unified data infrastructure.
- [ ] No, data is only accessible to certain business units and/or is fragmented and lagging.

Layer 2: Business Systems (Where Intelligence Gains Meaning)

Think about the business systems that create insights in your organizations. List them and which departments own them.

Business System	Department Owner(s)

Layer 3: Agentic OS (Where Intelligence Meets Work)

Do your teams gather intelligence, collaborate, and make decisions in the same operating system?

- [ ] Yes
- [ ] No
- [ ] Sometimes, but not always.

Personal Assessment: Where is there room for growth?

Based on your assessment for each layer, which does your team need to work on most? *(Select all that apply)*

- [ ] The Data Foundation
- [ ] Business Systems
- [ ] Agentic Operating System

Your next action:

WORKSHEET 4

Design Your First Flow

Purpose: Pilot intelligence flow for one decision

Time: 30 minutes

Output: Actionable pilot plan

Step 1: Create Hypothesis (5 min)

Using the decision you traced in Worksheet 2, form a hypothesis for how that process would improve if insights surfaced automatically where work happens.

Example: "If intelligence from [*X systems*] surfaces automatically in [*Slack channel(s)*], then [*expected outcome*]."

Step 2: Design the Flow of Decision-Making (15 min)

List each piece of required intelligence, which business system it is sourced from, and where the insight should be surfaced for decision-making to take place within Slack.

Intelligence Required	Business System Source	Slack Agent *(if applicable)*	Slack Channel for Decision-Making

How can decision-making improve with the flow of intelligence? (10 min)

Who is involved in the pilot?

How long will you test? *(Recommend 2-4 weeks)*

What will you measure? *(e.g. time to decision, context quality, decision quality, team satisfaction, etc.)*