If AI Becomes Table Stakes, What Still Differentiates the Supply Chain?

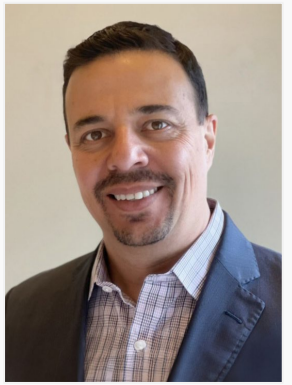
LUNCH AND LEARN

Thursday, November 5, 2026

Thank you for watching!



Chris Gaffney



Zaid Duwayri

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PART 2 · THE AI-MANAGED SUPPLY CHAIN: WHERE ADVANTAGE MOVES

If AI Becomes Table Stakes, What Still Differentiates the Supply Chain?

The tools will spread. The harder advantage sits in system design, proprietary context, optionality, and the ability to transform.

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THE Team

Who We Are



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SUPPLY CHAIN STRATEGY

EXPERIENCE

- 25 years at The Coca-Cola Company
- VP, Global Strategic Supply Chain
- President, National Product Supply Group
- Earlier operations roles at Frito-Lay

FOCUS AREAS

- Supply chain strategy & transformation
- Footprint design & network optimization
- Operating model & capability building
- Make/buy & shared services

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AI & TECHNOLOGY ENABLEMENT

EXPERIENCE

- EY — SC Technology Alliances Leader
- D4DT — COO & CFO
- Consignor US / nShift — GM, N. America
- Blue Yonder / JDA — Sr. Director, Sales
- Capgemini and i2 Technologies

FOCUS AREAS

- Supply chain transformation & enablement
- Strategic partnerships & tech alliances
- Enterprise supply chain technology
- AI/ML and analytics applied to supply chain
- Go-to-market strategy & practice development

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THE SERIES

Three conversations

01

The System

What changes — and what does not?

How does AI change the way the supply chain operates?

COMPLETE

02

The Strategy

Where does advantage move?

If everyone can access powerful AI, what still differentiates the supply chain?

03

The Leadership

How is the system governed?

How do leaders design, govern, and remain accountable for increasingly autonomous systems?

Today's focus: what remains difficult to copy when powerful AI becomes broadly available.

THE CENTRAL HYPOTHESIS

Access may converge faster than outcomes



What becomes common

Models, agents, computing capacity, and vendor features spread rapidly across the market.



What stays unequal

Data quality, operating context, physical networks, and management capability vary widely.



Where advantage moves

Companies gain an edge by redesigning the system and changing faster than competitors.

Discussion question: If competitors can buy similar intelligence, what still takes years to build?

THE STRATEGIC TENSION

Move now, wait, or build while the market matures?



The case for moving now

- Learn through use
- Shape the data and operating context
- Build workforce capability
- Keep legacy design from becoming permanent



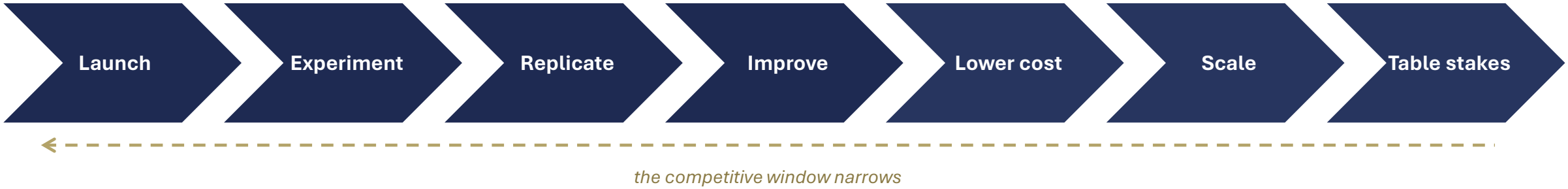
The case for waiting

- Providers continue to converge
- Technology choices change quickly
- Early investments can become stranded
- Foundations may need repair first

Discussion question: Where can a company learn now without locking itself into the wrong future?

Technology advantage decays faster than it used to

A capability that once differentiated a company can become broadly available within a much shorter window:

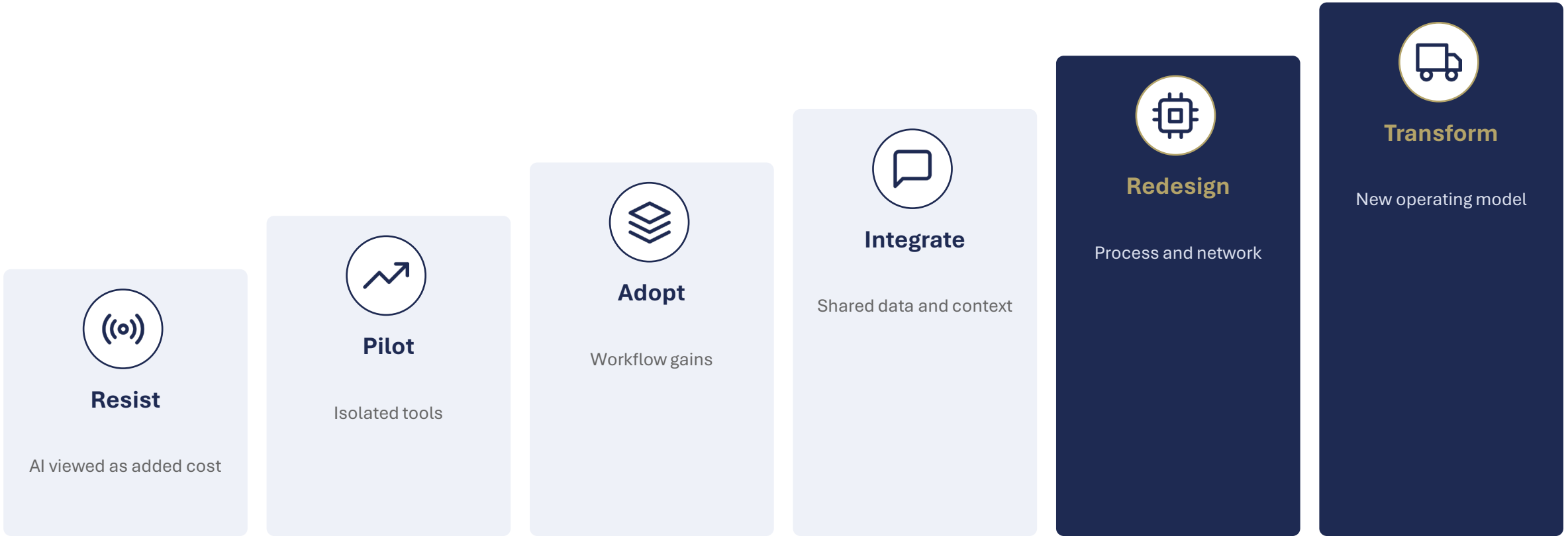


Capabilities that usually commoditize more slowly:

- Data
- Context
- Network
- Decisions
- Talent
- Change

The strategic question shifts from which tool is newest to what the company will do differently with it.

Companies are starting from very different places



The risk differs by position. Laggards may wait too long, while leaders can scale technology faster than their operating model can absorb it.

Waiting may lower technology risk and increase strategic risk

WHY WAITING LOOKS RATIONAL



WHAT STILL DOES NOT ARRIVE WITH THE TOOL

Your North Star

Competitors may make the technology choice easier while building knowledge, context, and transformation capability that cannot be purchased later.

The question that shapes timing: what must the organization learn before the market settles?

AI cannot wallpaper over fragmented data and weak process

	WHAT THE TOOL NEEDS	WHAT BREAKS WITHOUT IT
CONTEXT LAYER Common definitions, customer and product relationships, operating rules	Consistent data and meaning across facilities	Inconsistent context prevents reliable decisions across facilities
DECISION LAYER Clear processes, policies, decision rights, and escalation paths	Rules that turn recommendations into accountable action	Automation scales unclear policy and local workarounds
PHYSICAL LAYER Network constraints, capacity, partner readiness, and execution limits	A current view of constraints and execution capacity	Digital speed collides with physical reality

Companies can repair these foundations in sequence or in parallel. They cannot skip them.

CHAPTER BREAK

Where Advantage Moves

Differentiation shifts from access to intelligence toward the design and operation of the full supply chain system.

Brownfield, greenfield, or greener field?

BROWNFIELD

Accept current physical assets, systems, contracts, and near-term constraints. Improve performance within those limits.

GREENFIELD

Design from the business promise. Assume modern data, AI, and automation without carrying forward legacy process assumptions.

GREENER FIELD

Protect the constraints that are real. Challenge habits and routines that only appear fixed. Sequence the migration.

Discussion question: Which parts of today's supply chain are truly fixed, and which only feel fixed?



The batch-designed supply chain

HISTORICAL DESIGN

Orders sit until cutoff. Routing follows. Production and deployment react later. Time and inventory absorb the delay.

AI-SHAPED OPPORTUNITY

New demand signals update plans continuously. Routing, production, and replenishment can respond before the next planning cycle.

THE STRATEGIC SHIFT

Redesign routines built around information delay. Reconsider buffers, buildings, software, and decision rights around continuous flow.

Discussion question: Are we applying AI to an old batch system, or reconsidering why the system runs in batches?



A network designed for time compression

TRADITIONAL NETWORK

Hub-and-spoke designs often assume product will stop, wait, store, and move through established nodes.

AI-SHAPED DESIGN

Better sensing and orchestration make more fast flow possible. Some facilities may operate more like transfer points than storage locations.

THE STRATEGIC SHIFT

Start with the customer promise and redesign the network around elapsed time. Then test what existing assets can support.

Discussion question: If every shipment is on the clock, should the building and network still look the same?

What can be bought and what must be built

THE MARKET CAN SUPPLY

- Models and copilots
- Agent platforms
- Planning applications
- External implementation support

THE COMPANY MUST BUILD

- Proprietary operating context
- Network and system design
- Decision architecture and optionality
- Organizational learning and transformation capability

Technology access can narrow performance gaps. It does not supply a company's operating philosophy or its ability to change.

ANSWERING THE TITLE QUESTION

Four sources of durable advantage

Context

Trusted operational data, institutional knowledge, customer relationships, and business rules.

Design

Network, process, and decision architecture shaped around the company's business promise.

DESIGN AND CHANGE THE SYSTEM

Optionality

Choices in supply, capacity, technology, and operating response when conditions change.

Transformation

Leaders and teams who can translate a North Star into sustained change while the business keeps running.

Advantage comes from capabilities that compound and remain difficult to copy.

CLOSE · AND A BRIDGE TO PART 3

Similar tools can produce very different supply chains

Strategy determines what to build. Leadership determines whether the organization can get there.

What to decide now

Define the North Star, identify foundation gaps, and choose the first part of the system that deserves redesign.

Next: Part 3

Who sets objectives, guardrails, decision rights, and accountability as autonomy increases?

Join the conversation

Send us the examples and questions you want the leadership discussion to examine.

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