

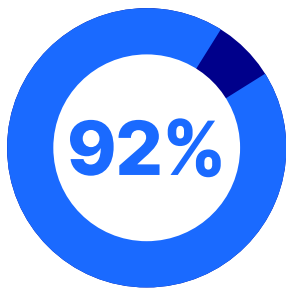
Content management best practices for the agentic AI era

Five ways intelligent SaaS content management enables agentic AI workflow automation



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of organizations have experienced at least one AI setback (projects scaled back, quality issues, compliance blocks, delays, etc.) tied to content barriers.¹

Agentic AI systems don't simply retrieve documents, they reason over content, make decisions based on it, and trigger multi-step workflows on behalf of users. But these capabilities are only as reliable as the content that underpins them.

Most organizations aren't as ready for an agentic AI transformation as they may think. When content is fragmented, inconsistently governed, or disconnected from the business applications where work happens, AI agents can't perform at their full potential. Agents acting on poorly managed content end up retrieving incomplete or outdated information and producing unreliable outputs. Governance gaps lead to AI actions that can't be traced, audited, or explained, and can create compliance exposure. Siloed repositories force agents to operate with partial context, which may lead them to act without critical information.

Success in the agentic AI era isn't about maximizing the number of agents deployed, it's about enabling agents to work alongside employees to automate and accelerate previously manual tasks. In practice, this looks like:

- Replacing multi-step processes with single automated actions.
- Resolving cases in minutes rather than days.
- Making decisions autonomously and instantly instead of requiring human coordination.

The right content management platform can deliver the connected and governed content foundation needed to facilitate agentic AI business transformation. Embedded agents let teams automate decisions and accelerate approvals without leaving their everyday tools. Built-in governance means AI actions are compliant by default, not by exception. Out-of-the-box automation eliminates entire categories of manual work. And continuous updates mean the platform becomes more capable over time, without additional effort from IT.

1. Foundry Research sponsored by OpenText, [MarketPulse Survey: Content Modernization: Accelerating Enterprise AI Goals](#), June 2026

Before you deploy AI agents, ask:

Is content centralized or still scattered across repositories?

Is metadata applied consistently, or dependent on individual users?

Are access controls enforced automatically or managed manually?

Is content connected to the business applications where agents need to act?

Best practice 1: Start with content that’s AI-ready

Only 12 percent of organizations have content that is fully governed, centralized, and connected.² Fragmented repositories, inconsistent metadata, and siloed business applications create blind spots that limit what agents can do and increase the risk of AI acting on incomplete or outdated information.

Rather than requiring a separate data preparation project before AI can be deployed, a SaaS content management platform delivers a centralized, consistently classified, and connected business context from day one, so AI has what it needs to deliver value immediately.

What makes content usable for AI agents?

Not all content is equally useful to an AI agent. Content that is unified, accurate, permission-aware, and enriched with metadata allows agents to retrieve what’s relevant, act with confidence, and stay within the boundaries the organization has set.

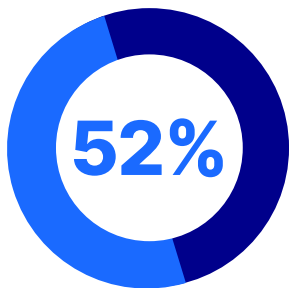
Content that limits AI	Content that enables AI
Scattered across multiple repositories with no single source of truth	Centralized in a unified environment accessible across systems
Inconsistently named, tagged, or categorized	Enriched with standardized metadata and taxonomy out of the box
Siloed from the business context agents need to act	Connected to CRM, ERP, and productivity applications
Governed inconsistently or not at all	Permission-aware, with access controls applied
Outdated, duplicated, or unverified	Current and accurate, with lifecycle policies applied automatically

2. Foundry Research sponsored by OpenText, *MarketPulse Survey: Content Modernization: Accelerating Enterprise AI Goals*, June 2026

3. McKinsey & Company, *The State of AI: How Organizations Are Rewiring to Capture Value*, 2025.

\$2.6T–\$4.4T

McKinsey estimates AI agents could add between \$2.6 trillion and \$4.4 trillion in annual value across business use cases globally—but only where content, data, and process context are connected and accessible.³



of organizations report that employees widely or frequently use unsanctioned tools and public AI platforms to get work done because approved systems are too slow or limited.⁴

Best practice 2: Put AI agents inside the apps your teams already use

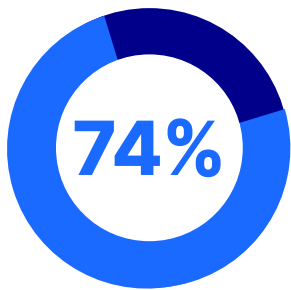
AI that requires teams to open a separate application, remember a new interface, or interrupt their existing flow won't change how work gets done. It adds friction to an already-crowded workday. Worse, it can create risk for the organization, including governance gaps, data leakage, IP exposure, and compliance violations organizations can't see or control.

The solution is AI embedded directly inside the tools teams already use, in a governed, traceable way. Choosing an intelligent SaaS content management platform that includes ready-to-use integrations with the applications where your HR, sales, customer service, and operations teams already spend their time solves these challenges. Embedding AI agents directly inside Microsoft 365, Salesforce, SAP, and Google Workspace means no context switching, no separate console, and no custom development required.

Agents act in context: summarizing a contract inside Salesforce, routing an approval inside Teams, or surfacing the right document inside SAP. Choosing a platform that enables agents to operate within your governed content environment means every action is traceable and compliant.



4. Foundry Research sponsored by OpenText, [MarketPulse Survey: Content Modernization: Accelerating Enterprise AI Goals](#), June 2026



of organizations say it is critical or very important that their content platform integrates with AI agents in the core business applications their teams use every day.⁵

Integration drives AI value

The richer the connection between your content platform and the business applications your teams use, the more context AI agents have—and the more accurate, relevant, and compliant their actions become.

Integrations that amplify agentic AI value

Productivity suites (eg. Microsoft 365 and Google Workspace) AI-to-AI integrations enable agents to retrieve governed, trusted enterprise content while using Microsoft Copilot and Google Gemini, empowering users to summarize documents, find key information, and reference source content without leaving the app they're currently in.

CRM (e.g., Salesforce) Embedding content governance inside Salesforce means sales and service agents have instant access to complete and up-to-date records of contracts and customer case files, accelerating decisions without leaving the CRM.

ERP (e.g., SAP) SAP integration surfaces content in the context of business transactions, so purchase orders and supplier records are instantly available where financial and operational decisions get made.

Line of business Integrating industry-specific platforms (eg. Guidewire) delivers agentic and AI capabilities: agents can retrieve policy documents, claims records, and regulatory filings in context, reducing cycle times and improving accuracy.

What embedded agents actually do

AI agents embedded in your business applications don't just retrieve files. They act, route, summarize, and trigger in context, without manual handoffs.

Business function	Pain point addressed	What the agent does
Sales	Reps waste time searching for contracts and proposals	Agent summarizes deal history, surfaces relevant documents, and drafts follow-up content inside Salesforce
HR	Onboarding paperwork is manual and inconsistent	Agent routes documents for signature, triggers policy acknowledgments, and files completed records automatically
Customer service	Reps toggle between systems to resolve cases	Agent surfaces case history, relevant policies, and recommended actions inside the service console
Operations	Approval workflows stall waiting for document review	Agent routes items for review, escalates overdue approvals, and logs decisions with a full audit trail

5. Foundry Research sponsored by OpenText, [MarketPulse Survey: Content Modernization: Accelerating Enterprise AI Goals](#), June 2026



Best practice 3: Get governance that’s built in, not bolted on

For responsible AI use in your business, every action an AI agent takes needs to be traceable. Every document it retrieves must be protected by the right access controls. Every AI output needs to be explainable. But only 27 percent of organizations report consistent governance across all enterprise content. Manual governance doesn’t scale. Governance that’s bolted on after the fact can’t keep up.

Organizations need SaaS content management that automates governance, with retention policies, privacy controls, role-based access, and audit trails built into the platform. Applied consistently across content, workflows, and every AI interaction without requiring users to remember or act, this type of governance can drastically simplify a critical part of content-readiness for AI. When regulations shift, controls are automatically updated, meaning no patch cycles and no compliance gaps.

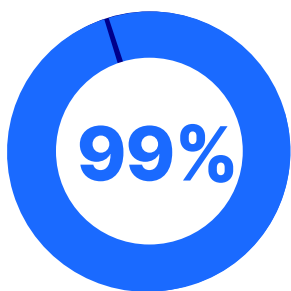
Only 27 percent of organizations report consistent governance across all enterprise content—leaving the vast majority exposed to compliance risk precisely when AI is acting on that content at scale.⁵

Governance that’s platform-native, not user-dependent

The table below contrasts what governance looks like when it depends on users versus when it’s built into the platform.

Bolted-on governance	Built-in governance
Retention policies applied manually, if teams remember	Retention and disposition automatically triggered at the content level
Access controls set per file or folder, inconsistently	Role-based access enforced uniformly across all content and AI interactions
Audit logs created after the fact, if at all	Full audit trails automatically captured for every action, including AI outputs
Compliance gaps when regulations change	Controls updated in the cloud automatically as regulations shift
Legal holds require manual identification and action	Legal hold workflows built in and defensible by default

5. Foundry Research sponsored by OpenText, [MarketPulse Survey: Content Modernization: Accelerating Enterprise AI Goals](#), June 2026



of organizations that have completed or are underway with content platform modernization report measurable positive outcomes, including faster AI deployment, improved governance, and higher employee productivity.⁶

6. Foundry Research sponsored by OpenText, [MarketPulse Survey: Content Modernization: Accelerating Enterprise AI Goals](#), June 2026

What audit readiness looks like in practice



Every document access, modification, and AI interaction is logged automatically—with a timestamp, user, and action recorded.



AI outputs are tied back to the source content they were based on, so explanations are always available.



Retention schedules run on time without manual intervention, and defensible disposition workflows protect the organization in litigation or investigation.



When an auditor or regulator asks, the answer is already there—no scrambling, no reconstruction.

Best practice 4: Put agentic automation to work from day one

Traditionally, deploying workflow automation meant requirements gathering, process mapping, and a long implementation cycle before teams saw any change. But today, organizations must expedite delivery of workflow automation to address employee demands for frictionless work and business demands for faster, more efficient operations.

If you are aiming to put agents to work within your day-to-day workflows, look for intelligent SaaS content management solutions that deliver:

- **Out-of-the-box configuration:** Look for a platform that you can easily tailor to common use cases, including HR, sales, customer service, and operations, so teams can start eliminating manual steps immediately and then tailor workflows to their specific needs as confidence grows.
- **No-code workflow:** Seek out easy-to-use workflow tools that empower business users to configure, adapt, and automate processes without writing code.
- **Advanced workflow:** For more complex requirements, look for the option to enable developers to build multi-step workflows incorporating integrations with third-party applications, APIs, multiple decision points, delayed actions, or custom scripting.
- **Native integrations to leading applications:** Seek out a platform that offers robust integrations with the critical applications your teams use daily, such as SAP, Salesforce, Microsoft 365, and Google Workspace. This ensures that line-of-business and productivity applications don't become silos. Instead, the critical data within these applications can be surfaced within your content management platform, ready for agents to act on and use.



From simple manual workflows to agentic automation

From digitizing paper-based processes to eliminating email follow-ups to implementing fully autonomous agent-led actions, intelligent SaaS content management provides opportunities to optimize processes and automate work.

Business function	Pain point addressed	What the agent does
Starting point	Manual review and approval via email	Workflow routes content to the right reviewer with notifications, deadlines, and a full audit trail
Intermediate	Document routing dependent on individual knowledge	Rules-based workflow automatically directs content based on type, department, or risk level
Advanced	Multi-step processes requiring human coordination at every stage	Agents handle routine steps, extract data, escalate exceptions, and log every action automatically
Full deployment	Disconnected processes across HR, sales, legal, and operations	Standardized cross-functional workflows with shared governance and unified reporting across the enterprise

Quick wins available out of the box



Contract review and approval routing with version control and signature capture.



Employee onboarding document collection with automated reminders and compliance confirmation.



Case file management with automated escalation rules and audit trail for customer service.



Purchase order and invoice processing with rules-based exception handling for operations.



Policy acknowledgment campaigns with automated tracking and reporting for HR and legal.



Best practice 5: Keep pace with continuous innovation

Organizations running on-premises or private cloud solutions know that keeping a platform current means managing upgrade projects, scheduling downtime, and coordinating IT resources, often every 6 to 12 months. Given this cadence and complexity, many organizations fall behind on upgrades.

SaaS eliminates these challenges by delivering new AI features, workflow innovations, governance updates, and security enhancements with no upgrade projects or infrastructure work required, and no disruption to operations. Platform enhancements are delivered automatically, freeing IT to devote time it would have spent managing upgrades to optimizing and innovating.

SaaS content management also lowers total cost of ownership compared to on-premises alternatives, with no server infrastructure to purchase or maintain, no internal teams dedicated to patching and performance tuning, and no expensive upgrade projects on a recurring cycle. Elastic scalability means growth doesn't require additional capital investment.

What continuous delivery means in practice

- New agentic AI capabilities delivered automatically—no upgrade project required.
- Security patches and compliance updates applied automatically as regulations and threats evolve.
- No infrastructure to manage means IT redirects time and budget from maintenance to higher-value initiatives.
- Lower TCO compared to on-premises platforms: no hardware, no dedicated maintenance resources, no upgrade cycle costs.
- Elastic scalability allows organizations to grow, add use cases, and expand to new departments without rearchitecting the platform.

Traditional upgrade model	SaaS continuous delivery
New capabilities require a planned upgrade cycle, often every 6–12 months	New capabilities automatically delivered
Security patches depend on internal IT scheduling and execution	Security and compliance updates automatically applied in the cloud
Infrastructure maintenance consumes IT bandwidth and budget	No infrastructure—IT focuses on higher-value strategic work
Scaling requires capacity planning and procurement cycles	Elastic scaling on demand, no procurement or earchitecting required
Technical debt accumulates between upgrade cycles, blocking AI access	Platform stays continuously current, always AI-capable

“Once we had shown the quick wins, more departments wanted to come on board, and we’re already looking at other business units where OpenText Core Content Management and OpenText Core Capture can add value.”

Mani Velayudhan

Director of SAP Operations
ScottsMiracle-Gro

Real-world impact: ScottsMiracle-Gro



ScottsMiracle-Gro saved \$500,000 per year by eliminating legacy license fees after moving to [OpenText™ Cloud Content Management](#).



The organization retired seven legacy applications upon go-live, with no transition period and no re-implementation of old processes.



With a current and stable platform, the team has been able to focus on innovation—evaluating generative AI capabilities including [OpenText™ Aviator™](#) to summarize documents, collate reports, and extract data.

Resources

[Intelligent SaaS content management ›](#)

[AI content management solutions ›](#)

[AI content assistant ›](#)

[Aviator Studio ›](#)

[Information governance solutions ›](#)

[Business integrations ›](#)

[ScottsMiracle-Gro case study ›](#)

Put AI agents to work, fast

Agentic AI is already changing how organizations work. The question is whether your content infrastructure is ready to support your employees working alongside agents. The organizations that will lead in the agentic AI era aren't waiting for a perfect migration window. They are building the foundation now with unified content, built-in governance, and a platform that keeps pace as AI evolves.

OpenText™ Core Content Management is built for how modern organizations really work with AI embedded, governance built in, and native integrations to the tools your teams already use. OpenText Content Aviator provides a built-in AI assistant ready to find, summarize, and act on content from day one. Aviator Studio, included in all OpenText Core Content Management plans, lets teams configure agents to handle complex workflows without writing code. And because updates are delivered automatically every 90 days, the capabilities available today are just the beginning. The platform is ready to revolutionize how your team gets things done. The only question is how quickly you want to put it to work.

Ready to build your AI-ready content foundation?

[Start a free trial of OpenText Core Content Management ›](#)