From AI Pilots to Enterprise Outcomes

A Playbook for Governed Agentic AI

NuSummit®



The Pilot That Never Leaves the Lab

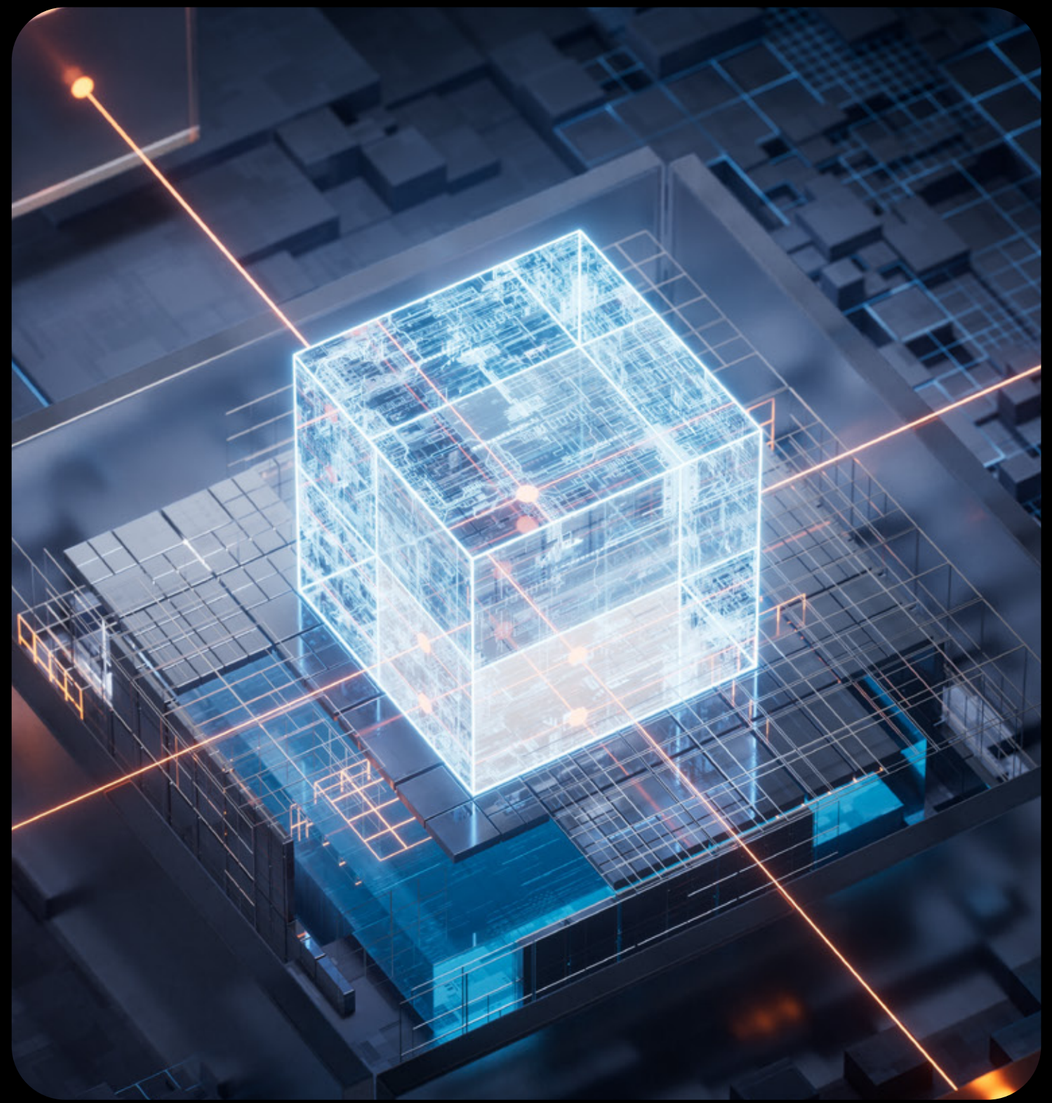
A trading desk pilots an AI tool for faster signal generation.

A claims team tests an agent for intake and triage.

A relationship management group tries a copilot for next-best-action recommendations.

Each of these typical scenarios should produce a working demo within weeks. Most of them are still demos a year later, running for the team that built them rather than the business that needed them.

The pattern has specific, recognizable causes. A pilot gets scoped around what a model can technically do, not what the operating environment actually demands. Governance gets added after a compliance reviewer asks a question and not built in from the first design meeting. Nobody tracks what the workflow costs to run, so nobody can make the case to fund it past the pilot stage.



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The gap between a working pilot and a governed production system is where enterprise AI value quietly disappears.

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The Investment Case Has Changed

For the last two years, AI spend got judged on activity. How many pilots launched, how many teams experimented, how many proofs of concept got built. That standard is fading. Audit committees and CFOs are now asking a narrower question. What is the AI we already funded actually producing?

That question changes what counts as evidence. A working demo is no longer enough. Risk committees want to know where the underlying data sits, which model produced a given recommendation, and what that recommendation cost to generate, tracked by the workflow it ran in rather than the platform license it sat on. Three years ago, those were follow-up questions. Now they are often the first ones asked before a new initiative gets funded.

The pressure is not only internal. A competitor that treated its first pilot as a learning exercise last year may already be running that same workflow in production this year, at a fraction of the manual cost. Every quarter spent stuck in pilot mode is a quarter a competitor spends compounding that advantage.



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Introducing

NuSummit Builder Platform



NuSummit Builder Platform is the single platform all of this runs on, not just the workspaces people see, but the deployment, governance, and cost layers underneath them.

A team builds a workflow in Workflow Studio without writing code. They test it with Agent-N for autonomous reasoning, or Data Analyst for a plain-English query against governed data. Then they move the finished workflow into production on that same platform, not a different one, with the same guardrails and the same audit trail following it the whole way.

3 **Outcomes**
Speed, trust, cost control

4 **Lifecycle Stages**
Design, develop, deploy, monitor, and govern

5 **Deployment Options**
Cloud, private cloud, on-prem, hybrid, multi-tenant

6 **Production Guardrails**
access control, injection protection, approval gates, audit trail, policy engine, data residency

7 **Connected Platform Layers**
from foundation models through governance and cost tracking

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The Enterprise Agentic AI Playbook

NBP runs one method across every deployment, regardless of which workspace a team starts in. Enterprise agentic AI does not start with picking an agent. It starts with deciding which workflow is worth the investment, how much autonomy the agent running it should have, and what must be true before it touches a live system.

01 **Identify**	Find the workflows where agentic AI creates measurable business impact.
02 **Assess**	Evaluate data readiness, process complexity, risk, and where a human needs to stay in the loop.
03 **Design**	Define the agents, tools, data, models, and orchestration the workflow actually needs.
04 **Govern**	Build in identity, policy, guardrails, human approval, and a full audit trail.
05 **Deploy**	Move from experimentation to controlled production in the environment the business requires.
06 **Optimize**	Track outcomes, accuracy, adoption, latency, and cost, then improve the workflow over time.

Underneath every stage runs the NBP Enablement Layer.
It combines orchestration, governance, integration, observability, model choice, and cost control, present from the first stage rather than added after launch.

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The second workflow through this playbook always moves faster than the first.

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The Six Questions That Leaders Are Asking

Every leadership team moving through this playbook eventually raises some version of the same six questions. Here is what is actually at stake in each one, and where NBP picks up the answer.

Q. **Where should we be investing first?**

A. A head of transformation who spreads AI spend evenly across every department usually finds that none of it reaches scale. The playbook starts with Identify precisely so investment follows the workflow with the clearest measurable return.

Q. **Why aren't our pilots returning measurable value?**

A. A pilot that never leaves the lab cannot prove a return, no matter how well it performs in testing. NBP's live cost catalog and per-step audit trail show which workflows are creating value and which are stalled, before either one gets more budget.

Q. **What has to change about how we operate, not just what tools we buy?**

A. Layering a new tool onto an unchanged operating model tends to add a silo rather than remove one. Workspaces, Services, Connectors, and Skills replace the stack of disconnected point tools most teams accumulate project by project.

Q. **How do we scale without losing control of data, cost, or risk?**

A. Scaling usually means losing visibility into all three at once. Role-based access, audit trails, and cost rolled up by company, department, and user are what keep that control intact as adoption grows past the first use case.

Q. **What should stay human-led, and where can we safely hand off to an agent?**

A. Getting this wrong either slows the business down or creates a risk that nobody signed off on in the first place. Configurable approval gates let a team decide, workflow by workflow, where an agent acts alone and where it waits for a person.

Q. **How do we avoid ending up with another pile of disconnected point solutions?**

A. Every new AI tool arrives promising integration, and most still add one more system to manage. NBP exposes every workflow as a governed tool over the Model Context Protocol in one place, so capability grows without sprawl.

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This is an enterprise re-architecture, not a tool rollout. The organizations that treat it that way are the ones closing the gap.

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What It Delivers

Closing those six gaps takes more than good intentions. It takes an operating model built around five specific capabilities, present from day one rather than added after a pilot stalls.



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1

Full lifecycle ownership

One coherent path from design through governance, instead of five disconnected tools stitched together after the fact.



2

Enterprise readiness by design

Deployment across cloud, private cloud, on-premises, and hybrid environments, with access control and guardrails built in from day one.



3

Support for every persona

Agent-N for autonomous work, Data Analyst for self-serve queries, Workflow Studio for building without code. A model that only works for engineers won't scale past the first team.



4

Trust and cost resolved

A live cost catalog estimates token spend before it's committed and audits every agent step afterward, with cost rolled up by company, department, and user, not just by platform license.



5

Freedom of choice

Run proprietary models such as GPT, Claude, and Gemini, or self-host open-weight models through engines your own infrastructure team already operates, vLLM, Ollama, llama.cpp, Hugging Face TGI, SGLang, or TensorRT-LLM, with weights, prompts, and completions never leaving your tenant boundary.

This is the operating model that NuSummit Builder Platform is built on.

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Governance

Of the five capabilities above, teams most often get governance wrong, usually by treating it as a late addition rather than a starting condition. The teams that scale fastest build governance in from the first workflow, before an incident forces the issue.

Every workflow carries its own risk profile. Routine actions, a status lookup or a document summary, run without interruption. Higher-stakes actions, a trade instruction, a credit decision, a customer-facing commitment, pause for a person to confirm before the agent proceeds, with the decision trail logged alongside it. A compliance team sets its own threshold for when to pause, when to escalate, and when to let the agent continue, workflow by workflow rather than platform-wide.

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Governance in NBP is based on the following four values



Access and identity

Role-based control over who can see and touch what.



Human approval gates

Configurable checkpoints that pause for sign-off on the actions your business defines as high-stakes, with escalation rules set in advance.



Audit and lineage

A full trace of every prompt, model call, and decision.



Policy enforcement

Applied at the prompt, model, and data level, consistently.

For banking and capital markets, this is not optional. A trading instruction or a credit decision generated by an agent must hold up to the same scrutiny as one made by a person, with a trail that satisfies both internal risk teams and external regulators.

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NBP Proven Results

These are not projections. Each figure comes from a workflow already running in production, measured after the fact rather than estimated beforehand.



50-70%

Reduction in report preparation effort:
business reporting narrative workflow



30-50%

Faster time to insight:
self-service data query workflow



~35%

Faster resolution, SLA maintained:
customer query handling workflow



~40%

Lower cost per interaction:
same workflow, cost lens

These numbers came from narrow, well-scoped workflows, not platform-wide rollouts.
A team picks one workflow, proves it holds up under real volume, and only then moves to the next.

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What This Looks Like in the Financial Services Domains

The playbook and the proof points above translate differently depending on where you are positioned. Here is what closing the gap looks like industry by industry, starting with capital markets and banking.



Capital Markets

Research, deal support, and due diligence workflows, covered in depth in our Data & AI eBook.



Banking

Customer 360 analytics, relationship manager and branch copilots, next best action recommendations, credit underwriting, and loan document automation.



Insurance

Underwriting assistance, claims intake and triage, fraud detection, and policy servicing Q&A.



Wealth and Asset Management

Advisor copilots, portfolio commentary generation, and RFP drafting support.



Cross-function

Business reporting narratives and self-service data Q&A without writing a line of SQL, the same workflow pattern showing up in every department that touches data.

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Why NBP OR One Partner for the Whole Journey

A reasonable question at this point is why NBP closes this gap when so many other platforms have not. A hyperscaler can hand a firm infrastructure and a choice of models, then leave the governance and the domain context to be built in-house. An orchestration framework can give a firm the plumbing to connect agents, with no accountability for whether the resulting workflow fits the business or satisfies its regulator, and typically without a single governed integration point like NBP's Model Context Protocol layer.

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NBP brings three things together under one partner



An enterprise AI platform built for governance, security, and scale, not a generic toolkit retrofitted for the enterprise.



Twenty-five-plus years of domain expertise across banking, capital markets, insurance, and wealth management, so the platform understands the business running on it.



End-to-end delivery, from strategy through implementation, integration, and ongoing managed services, so one partner carries the work from first use case to production.

The path follows the playbook. A team picks a single workflow with a clear, measurable outcome, proves the pattern works with governance and cost visibility built in from day one, then repeats it on the next workflow using the same platform instead of starting over. In this model, production is not a separate project that follows the pilot. It is what the pilot was building toward from the start.

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Let's Build It

AI projects that never reach production do not fail for lack of ambition. They fail because a pilot and a production system aren't the same thing, and most organizations build only the first. Governance, observability, and cost visibility are not features to add once a workflow proves itself. They are what let a workflow prove itself safely enough to be trusted with the next one.

The six-stage path in this playbook, Identify, Assess, Design, Govern, Deploy, Optimize, is not a one-time project plan. It is how NuSummit Builder Platform expects every workflow to move, the first one and the fiftieth. That repeatability, more than any single capability, is what turns an AI pilot into an enterprise outcome.

The organizations closing this gap fastest are not the ones running the most pilots. They are the ones that pick one workflow, build it properly the first time, and use the same platform to do it again.



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