

WEEK OF SEPTEMBER 21, 2026

Automate the Difficult. Preserve the Human.

A weekly record of what we believe, what we built, and what that now makes possible.

One Week From Thesis to Operating Model

Philosophy became operating reality, and the next phase came into view.

In seven days, the thesis became tangible.

A week ago, the idea behind The Platform was already clear: manufacturing should not have to operate as a collection of disconnected systems, screens and human workarounds. The real opportunity for AI is not to make those systems slightly easier to use. It is to rethink how the work itself gets done.

What changed this week is that the philosophy started acquiring a body. In a remarkably short period of time, we moved from thinking primarily about the product to representing much more of the operating reality around it. Products now exist in the context of companies, brands, clients, people and teams. Materials and components are connected to the products that depend on them. Orders create demand. Demand encounters inventory. Shortages create requirements. Requirements lead into purchasing and supply. Materials exist in lots, move through physical locations and processes, encounter quality events and ultimately affect production and delivery commitments.

The importance of that work is not the number of objects or screens we created. It is that these things are beginning to exist as one connected world.

Manufacturing is one connected reality, not a collection of software categories.

An order is not simply an order anymore. It has consequences. A material shortage is not simply an inventory problem. It can affect purchasing, production readiness and delivery. A failure during dyeing is not simply a quality event. It can block a material that is already committed to products and orders, forcing a decision about substitution and creating consequences further downstream.

That is the world The Platform has to understand if it is ever going to do more than report what has already happened. The value is in the relationships: which products depend on which materials, which orders depend on those products, where inventory physically exists, what processes have already occurred, what is blocked, what can be substituted, and which commitments are affected when reality changes.

This week we also moved deeper into the physical side of manufacturing. Inventory is becoming something that exists in lots, locations, handling units and movements rather than as a number someone types into a field. Materials can be received, allocated, inspected, blocked, transferred, consumed and traced. Purchasing and inbound activity can connect to the same operating truth instead of beginning another disconnected chain of records.

Seed to dirt is not a traceability feature. It is the operating model.

This is what we mean by seed to dirt. The history of a product should not have to be reconstructed after the fact for a report, a compliance request or a digital passport. The history should exist naturally because The Platform understood the product, the material, the lot, the process, the location, the quality event and the movement when they happened.

The same principle applies to change. If a material, product definition, process or commitment changes, The Platform should not merely record that someone edited a field. It should understand what depends on that

change and what may now be affected. A fabric substitution, a failed inspection or a new delivery commitment should be able to travel through the relationships around it and expose the consequences before people have to discover them manually.

The tools change. The human purpose does not.

Jeffrey Katzenberg recently wrote about an earlier technological transformation at Disney. When Disney was confronting the move away from hand-painted animation, they went back through Walt Disney's recordings, notes and work. What they discovered was that Walt rarely defined animation by the tools used to make it. He cared about character, emotion and whether the audience believed what they were seeing. His principles endured even when the tools changed completely.[1]

That idea is useful because manufacturing is full of activities that we have gradually mistaken for the purpose of the people performing them. A buyer does not exist because purchase orders need to be entered. A production manager is not valuable because they update statuses. A quality specialist is not valuable because they complete inspection forms. Those activities became part of the job because the systems around the job required them.

What we actually value in those people is judgment, experience, negotiation, creativity, accountability, relationships and the ability to recognize that something is wrong when the available information is still incomplete. That gives deeper meaning to our principle, Automate the Difficult. Preserve the Human. It does not mean preserving every task a person performs today. Many of those tasks should disappear. It means understanding what the human was really contributing and designing the technology around preserving and amplifying that contribution.

Joule points toward intent replacing application navigation.

SAP's work with Joule is interesting because it challenges one of the basic assumptions of enterprise software: that people need to understand how the software is organized before they can accomplish something. Joule Work is positioned as a dynamic workspace where people express intent, while the intelligence underneath surfaces relevant information, automates routine work and coordinates AI agents across the enterprise. SAP describes its Autonomous Enterprise direction simply: people set the direction and AI executes, with governance around that execution.[2]

That is very close to where our own thinking has been heading. Someone running manufacturing should not have to understand where a particular piece of information lives before they can ask whether an order can be made on time. They should not have to move through several parts of a system to understand why something is late, what will happen if a material is replaced, or which commitments now require attention. They should be able to express the question or the intent naturally. The burden of assembling the manufacturing context should increasingly belong to The Platform.

Eigen points toward intelligence that actually does the work.

Siemens' Eigen Engineering Agent adds another part of the picture. Siemens is deliberately distinguishing between AI that generates suggestions and AI that performs work. Eigen operates inside the engineering environment, understands project context, breaks complex work into steps, executes it, checks its output against requirements and iterates before presenting the result for review. Siemens describes the shift as moving from manually executing tasks toward orchestrating outcomes.[3]

That distinction matters enormously for what comes next for The Platform. If The Platform recognizes that a failed material will put several orders at risk and simply sends someone an alert, we have created a more intelligent notification system. Useful, perhaps, but not transformative.

The real opportunity begins when The Platform understands the event, follows the dependencies, determines what is affected, knows what options are available and then acts on the parts of the response that do not require human judgment. Perhaps another approved material already exists. Perhaps inventory is available somewhere else. Perhaps purchasing needs to change. Perhaps production can be resequenced. Perhaps the customer commitment can still be protected without a person coordinating a series of disconnected actions.

And perhaps none of those alternatives is acceptable. That is when a person should be brought in, not with an alert that says there is a problem, but with the context necessary to exercise judgment.

The next phase is consequence-aware execution.

What makes this particularly exciting is that a week ago much of that would still have been an architectural aspiration. Now we have started building enough of the manufacturing world underneath it for that kind of reasoning to become possible. The Platform is beginning to know what products are, what they require, what materials exist, where inventory is, what orders need, how things move, where quality can intervene and how one part of the operation depends on another.

That changes the nature of the next phase. We do not need to spend the next week simply adding more traditional manufacturing functions until we have reproduced everything that already exists elsewhere. We need to begin making the relationships we have created intelligent.

When something happens, The Platform should increasingly understand what that event means in the context of the whole operation. It should recognize what changed, determine what depends on it, understand what commitments may now be affected and decide whether the appropriate response is information, action or human judgment. Where the response is mechanical and safely within its authority, it should increasingly handle it. Where experience, judgment or accountability is required, it should bring the right person into the loop with the relevant context already assembled.

The smarter the system becomes underneath, the quieter the experience should become above it.

The destination cannot be an enormous application containing every screen anyone might ever need. The more intelligence we build underneath, the less complexity we should expose above it. The experience should increasingly feel like understanding the state of your world: what changed, what matters, what is at risk, what The Platform is already handling and what genuinely requires you.

You should be able to go deeper whenever you need to, but you should not have to continuously interrogate the machinery just to understand what is happening. The paradox is important: a far more sophisticated operating model should produce a calmer human experience.

What the week really changed.

Katzenberg reminded us not to confuse the tools with the purpose. Joule shows an enterprise world beginning to move from navigating software toward expressing intent. Eigen shows intelligence moving from advising

people toward performing meaningful work. And in one week, we built a surprising amount of the connected manufacturing reality that makes those ideas actionable for us.

The next phase is no longer simply about representing manufacturing. It is about teaching The Platform to understand what is happening inside manufacturing, understand what should happen next, and increasingly take responsibility for making it happen, while remaining very clear about where the machine should stop and the human should begin.

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Reference points for this issue

1. Jeffrey Katzenberg, “The World is Changing: AI For Creativity.”
2. SAP, “Joule Work” and “The Future of the Enterprise Is Autonomous.” Source
3. Siemens, “Siemens launches the Eigen Engineering Agent, bringing purpose-built AI to industrial automation engineering.” Source