

Winning the recommendation economy

How brands compete when AI becomes the decision-maker

frogTM

Part of
Capgemini Invent

ABOUT FROG

frog is the reinvention & experience partner

- Unleash Growth
- Build Resilience
- Unlock Human Potential

Partnering with you to

MAKE YOUR MARK.

Strategy & Innovation

Envision, invest in
and create the future

Product & Design

Humanise technology to
win hearts and move markets

Brand & Marketing

Craft meaning,
extend reach and shape impact

Sales, Service & Commerce

Serve with clarity,
convert with confidence

Dream big
and deliver



2,000 frontier talents

Reinvention & Experience specialists
to deliver from vision to value

SYNAPSE
Part of Capgemini Invent

cambridgeconsultants
Part of Capgemini Invent

Capgemini **engineering**

At the
leading edge



€2bn in AI investments

With data, methods,
solutions and products

nvidia **OpenAI** **Google**

Figma **ANTHROPIC**

salesforce **Adobe** **Vercel**

With
global scale



40+ locations from LA to Sydney

Working with Capgemini to partner with
the top 85% of the Forbes Global 2000

FORRESTER Leader in AI & CX Strategy

Gartner Leader in Digital Experience Services

Forbes Best Management Consulting Firms

Coca-Cola

Unilever

IKEA

TIFFANY & CO.

BARCLAYS

Mercedes-Benz

**JPMORGAN
CHASE & CO.**

sanofi

L'ORÉAL

**standard
chartered**

Disney

orange

BOEING

AstraZeneca

Suzuki

BOEING



Why Agentic Customer Experience and Agentic Commerce *matter now*

Consumers are already delegating decisions and actions to AI.

Customer behaviour is changing faster than organizations can respond.



3 to 5 trillion USD of global consumer commerce could be intermediated by agents by 2030

Brands are riding the AI wave, enabling natural-language and conversational discovery and AI-native commerce experiences.

53%

Of US Gen Z consumers are interested in delegating to AI agents (now)

Forrester

8-10%

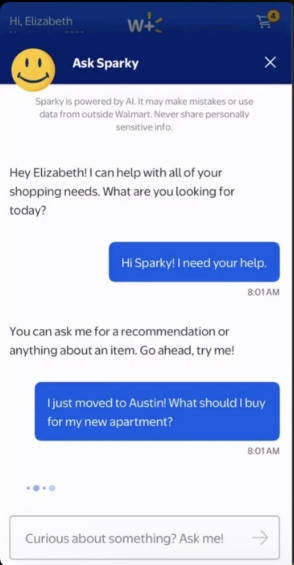
Drop in open web traffic
McKinsey

35%

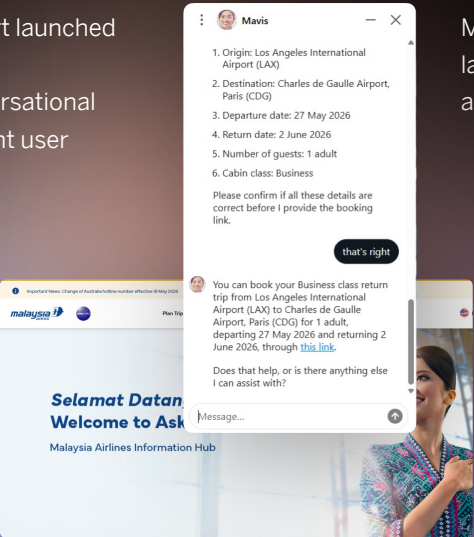
Higher order value for conversational assistant
Walmart

Higher order value for conversational assistant

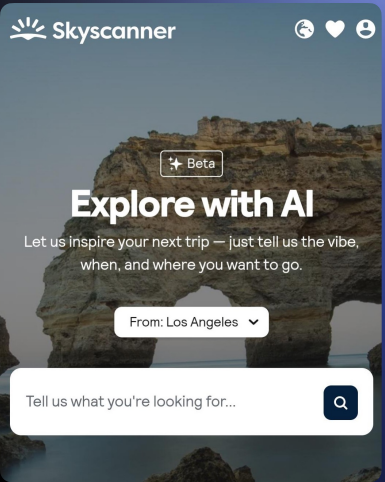
Walmart



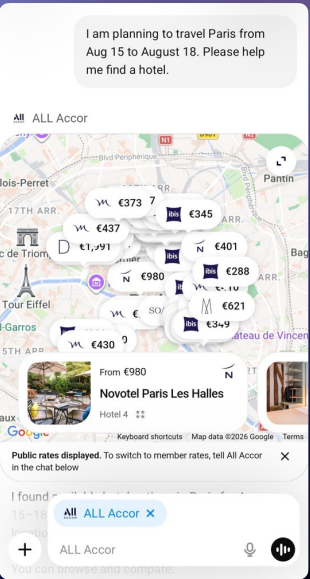
Walmart launched Sparky, a conversational assistant user



Malaysia Airlines launched Mavis, an agentic AI assistant



Skyscanner launched a ChatGPT flight search



Accor launched the ALL-Accor app in ChatGPT



What if your customers
never visit your website?



The opportunity



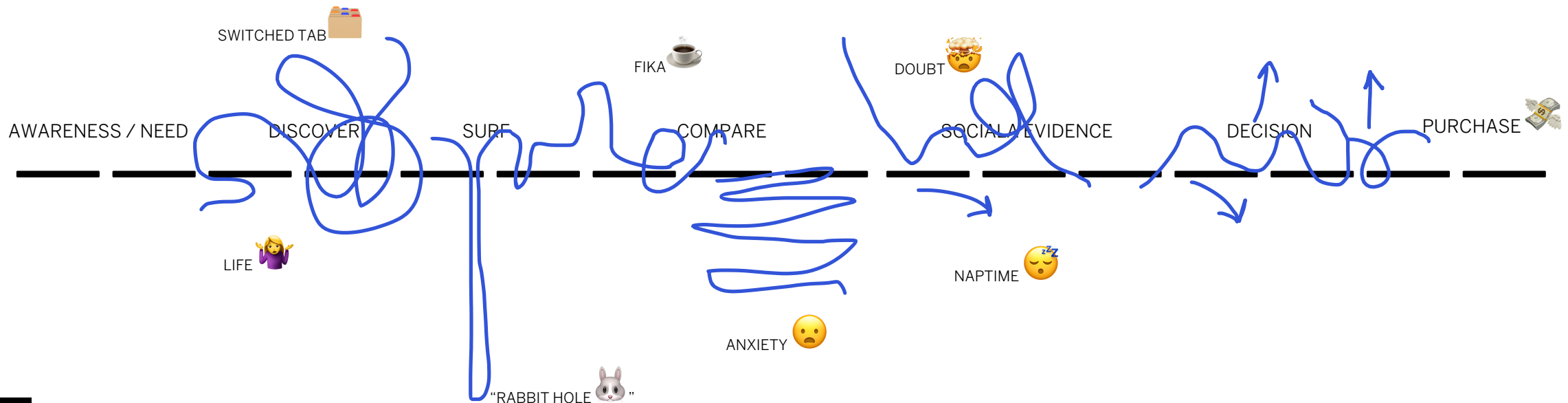
The customer journey is becoming invisible

- It is not in our nature to always follow the linear path
- AI does not change human behaviour, it amplifies what was already there

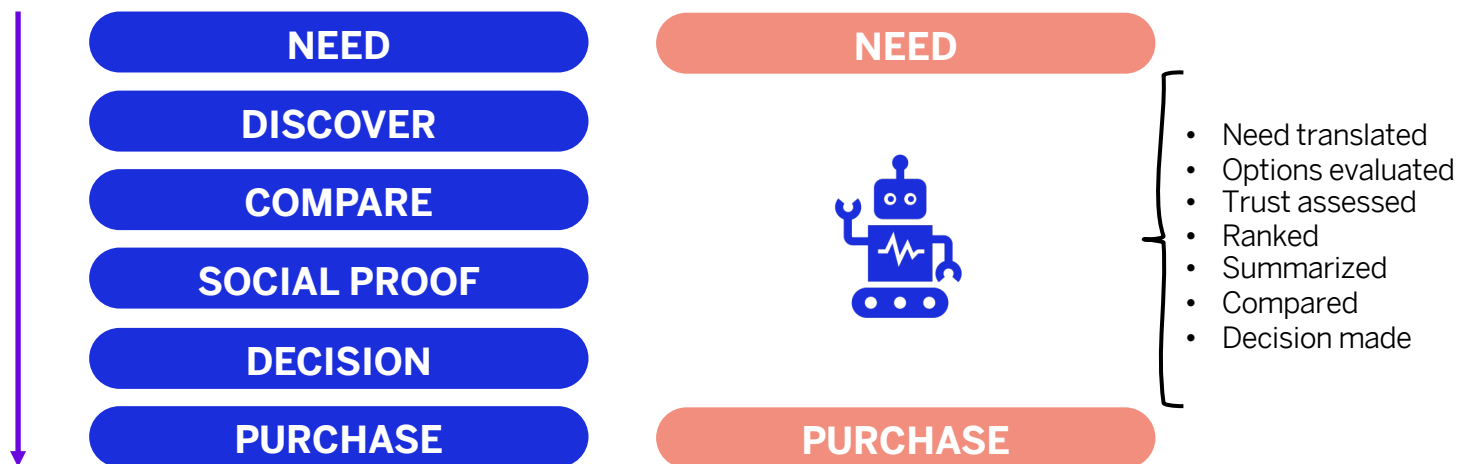
70%+

of shopping carts are
abandoned

Baymard Institute



From browsing to delegation



What AI changes: access · speed · memory (scale)

What does not change: delegate → receive recommendation → approve

How can I be of service?



58%

Replaced search with GenAI
for product
recommendations

Capgemini Research Institute, 2026

How can I be of service?



How can I be of service?



OUR PERSPECTIVE

Agentic commerce adoption won't follow a single path. It will vary by consumer comfort, category maturity and brand readiness.

1 ASSISTED COMMERCE

Agents browse, summarize, compare and explain trade-offs.

Consumer handles decisions and check-out.

Brands activate their strategy to be machine-readable.

2 PLANNED COMMERCE

Agents build plans, bundles, carts or itineraries.

Consumer provides approval at purchase and transaction happens in existing environment.

Brands shape new experiences and set up agentic capabilities.

3 DELEGATED COMMERCE

Agents offload routine decisions and simple purchases.

Consumer provides guardrails, budgets and ability to override.

Brands provide reliability and fulfillment ecosystem excellence.

4 OUTCOME DRIVEN COMMERCE

Agents pursue outcomes, proactively managing renewals, monitoring, switching decisions.

Consumer defines goals and exceptions.

Brands shift to outcome guarantors with execution proof fulfillment.

5 AGENT ECOSYSTEM

Agents negotiate and achieve goals across categories.

Consumer establishes fully interoperable and negotiation-ready capabilities.

Brands establish fully interoperable and negotiation-ready capabilities.



The challenge



How do we influence decisions
when humans are no longer
part of the process?



THE BIG SHIFT

Brands have always competed for attention throughout the buyer journey...



Etc...



THE BIG SHIFT

...Welcome to the recommendation economy

Compete for recommendation

not (only) attention

☰ Gemini Flash ▾

✎ ...

Help me find the best running shoes for tough terrain

For tough terrain—think loose scree, wet granite, deep mud, and exposed roots—the best shoe comes down to the specific ground conditions you face. Outsole compound, lug depth, and foot protection determine performance.

KNOW YOUR GRIP: LUG PATTERNS FOR DIFFERENT TERRAINS

SHALLOW, MORE CLOSELY SPACED LUGS FOR DRY, HARD-PACKED TRAILS

DEEP, MULTI-DIRECTIONAL LUGS FOR MUD AND LOOSE TERRAIN

STICKY RUBBER COMPOUNDS (LIKE VIBRAM) FOR WET ROCK OR TECHNICAL GROUND

Matching outsole lugs to terrain. Source: Trekitt — Matching outsole li terrain. Source: Tre...

↓

✚ Fråga Gemini

🎤

Model Primary Terrain



Behind one request: Hundreds of tasks executed in parallel

Using two main concepts : GEO and AEO

“Find me the best running shoes for rough terrain”

4 keywords via SEO
VS.
20+ keywords via GEO

Multiple simultaneous queries

best trail running shoes rough terrain 2026 top picks
trail running shoes rocky technical terrain rock plate grip
trail running shoes mud deep lugs traction best
trail running shoes wet rock sticky rubber outsole
best trail running shoes comparison Hoka vs Salomon vs La Sportiva
buy trail running shoes rugged terrain waterproof GTX EU

GEO Answer

Summary

Recommendations

AEO Answer

Comparison table + buy action

Analyse and synthesize

Evaluating all available sources to get a full picture of the different brands or stores that could be the best match for me, makes a selection from reviews and other trust signals

Consistency + TRUST across all sources

- User generated content & reviews
- Authorative & Owned Sources
- Reference & Knowledge
- Marketplace & Commerce
- Multimedia Sources
- Aggregators & Directories
- Editorial & Journalistic

- Unfiltered Reviews
- Clear Policies
- Verifiable Citations
- Structured Data
- Real-world Usage
- Un-biased Comparison
- Publication Authority

+ TRUST

+ TRUST

+ TRUST

+ TRUST

+ TRUST

+ TRUST

+ TRUST

Initial 2026 | frog Part of + TRUST | Invent

Human trust VS Agent trust

Future winners need both



Human trust is emotional

built through brand story, community, consistency, and the feeling of being known

- Brand perception
- Experience & emotion
- Story, imagery, persuasion



Agent trust is structural

volume and sentiment, pricing consistency, return policy clarity, and third-party editorial coverage

- Structured facts
- Service logic & constraints
- Consistency across channels
- Verifiable performance over time



The content foundation behind every AI decision

AI agents need:

- Images
- Videos
- Product data
- Metadata
- Instructions
- Manuals
- Certificates
- Policies
- Service contracts
- Spare parts information
- Etc

It's not that it's missing. But:

- **It's not structured**
- **It's not consistent**
- **It's not machine legible**

Where does this reside today?



Three waves of readiness

Agentic CX Transformation is not a single project. It is a sequenced capability build where each wave is enabling the next and compounding the value of the one before.

The brands in Wave 3 today are defining the defaults for everyone else.

WAVE 1: Be Discoverable

The foundation. Without this, nothing else works.

- Canonical product, brand, and policy truth
- Machine-readable structure, not just content
- Consistent semantics across all channels
- GEO-ready knowledge
- Interpretable by search, answers, and models

WAVE 2: Be Actionable

Automations and guardrails at micro-moments

- Explicit decisions, not implied logic
- Guardrailed automation for low-risk actions
- Executable policies (pricing, returns, compliance)
- Confidence thresholds and escalation paths
- Reversible actions with full observability

WAVE 3: Be Delegatable

End-to-end agentic steps, ownership and trust

- Agents execute full outcomes, not steps
- Persistent preference and intent memory
- Brand-level agent identity and accountability
- Agent-to-agent trust and routing
- Ownership beyond the transaction

Most organisations are mid-Wave 1.



Four natural areas brands can own the relationship after purchase

There are many territories after the first purchase where brands can build the emotional relationship that shapes the next delegation. These are not only service functions, they are brand-building surfaces to engage your customers.

Customer Support

AI-assisted support makes genuine care scalable. The way a brand handles a bad moment defines the relationship more than the product itself.

Proactive Service

Reaching out before something goes wrong changes the relationship dynamic entirely from vendor to trusted advisor.

Renewal

Your company's agents proactively ensure the renewal. Driving the upgrade decision equals being the answer before the question is asked.

Loyalty

Proactive and automated programs building emotional connection with the brand, acting on customer signals

87% of organisations with AI tools for front-line staff reported greater CX value *



So should we just build
for agents now?



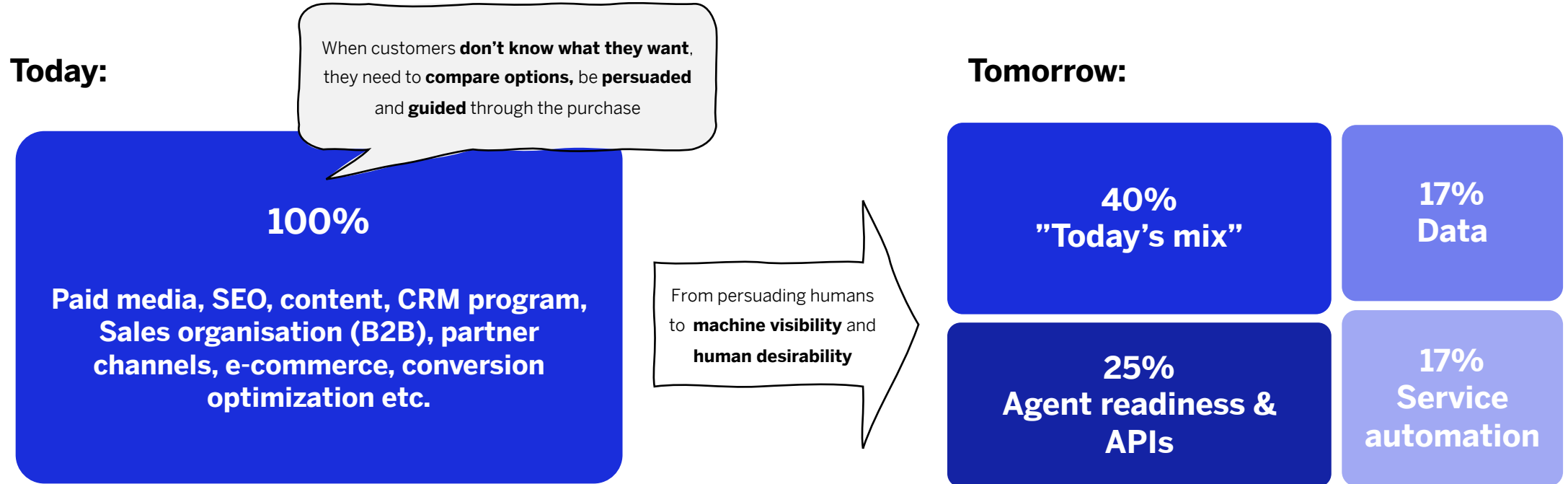
In categories with *high emotional involvement*, *brand* will continue to be very important.

The agent might help me choose between Volvo or BMW, but it won't help me **create my dream of what I want to signal as a person**

Where brand matters less; how might the budget shift?

In a speculative scenario, one can assume that budgets will shift from traditional acquisition campaigns to a wider range of items. Initially costs will go up, due to necessary investments into enable agentic autonomy. But when the infrastructure is in place, the costs will decrease or stay flat.

An illustrative example:



Perhaps we move from CAC & CRC to Cost to Be Recommended?



Questions to ask:

What content would AI trust?

What content would AI ignore?

What customer decisions are we influencing today?

What customer decisions will be delegated tomorrow?



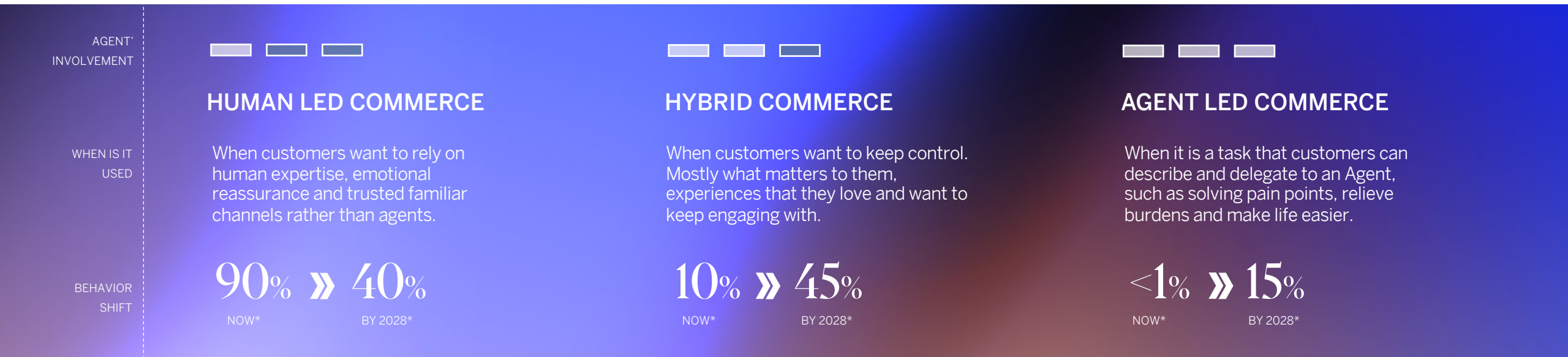
Fully delegated actions:



THE CONSEQUENCE

The shift towards fully delegated actions is rapid, and companies need to adapt

AI already profoundly reshapes customer behaviors shifting how decisions are delegated, shared or retained. Most companies' current distribution model is built for Human led commerce, however already by 2028, the behavior split will be shifted drastically towards more Agentic-driven commerce. **Depending on the level of human or agent involvement, the decision-making process can be simplified into three modes.**



Will you be selected when decisions are delegated?

In B2C:

- ✓ Can AI recommend you?
- ✓ Can AI accurately discover, understand and compare your products across every relevant source?
- ✓ Have you identified the customer intents and prompts where your brand needs to be recommended?
- ✓ Are price, availability, sustainability claims, reviews and policies current, consistent and verifiable?
- ✓ Can AI transact with you? Can an agent move from recommendation to configuration, purchase, delivery and returns?
- ✓ Can you earn preference beyond the first transaction through service, replenishment, renewal and loyalty?

In B2B:

- ✓ Can AI understand your offering?
- ✓ Can AI understand your products, solutions and expertise in the context of a customer's business need?
- ✓ Is complex information such as compatibility, configuration, certificates, manuals and contracts machine-readable?
- ✓ Can customer and supplier agents request specifications, quotes, availability and service autonomously?
- ✓ Are commercial rules, permissions, negotiated terms and approval thresholds executable and governed?
- ✓ Can AI maintain a long-term relationship with you? Can agents support the full lifecycle, from solution discovery and procurement to maintenance, renewal and expansion?

If AI cannot understand, trust and act on your content, it cannot recommend your brand.



One Foundation. Many intelligent Interactions.

