

# From Promises to Outcomes:

## *Overcoming the Hidden Challenges of Deploying AI Agents*

### Paul's Bio

Advises enterprise customers on integration, iPaaS and AI

20+ years' experience in SaaS, app integration and analytics

Prior to Tray.io, held leadership roles at Oracle, Workday

### Luke's Bio

Works with customers to deliver AI, automation projects

Expertise in design, deployment for AI, agents

Supports developers, IT and knowledge workers



**Paul Turner**  
Integration Strategist



**Luke Smith**  
Sales Engineer





# From Promises to Outcomes: Overcoming the Hidden Challenges of Deploying AI Agents

Paul Turner, Product Strategy, Tray.ai

Luke Smith, Senior Solutions Engineer, Tray.ai



## Overcoming the hidden challenges of deploying AI agents



**Paul Turner**

Product Strategist  
Tray.ai

## Tray.ai agent AI product demonstration



Luke Smith

Principal Solutions Engineer  
Tray.ai

By 2028, at least 15% of day-to-day work decisions will be made autonomously through agentic AI, up from zero percent in 2024.

**Gartner**

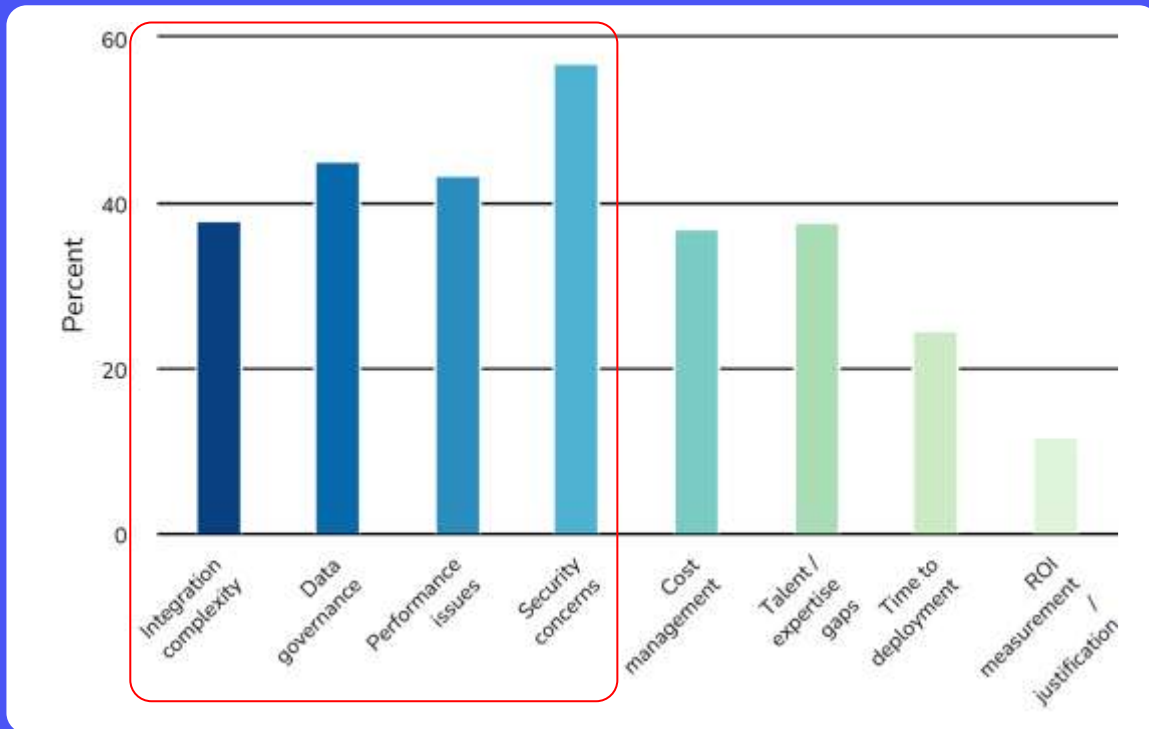
# Demand across every business function

What business problems will you prioritize for AI agents?



# Risks: Integration. Data. Performance. Security

What challenges are you currently facing in developing and deploying agents?



# Integration is key to build and shift AI apps into production

“Organizations have been experimenting with generative AI and need to start showing real progress in production. Integration developers are absolutely critical in getting business value from generative AI, as the best results come from a fusion of models with organizational data.”



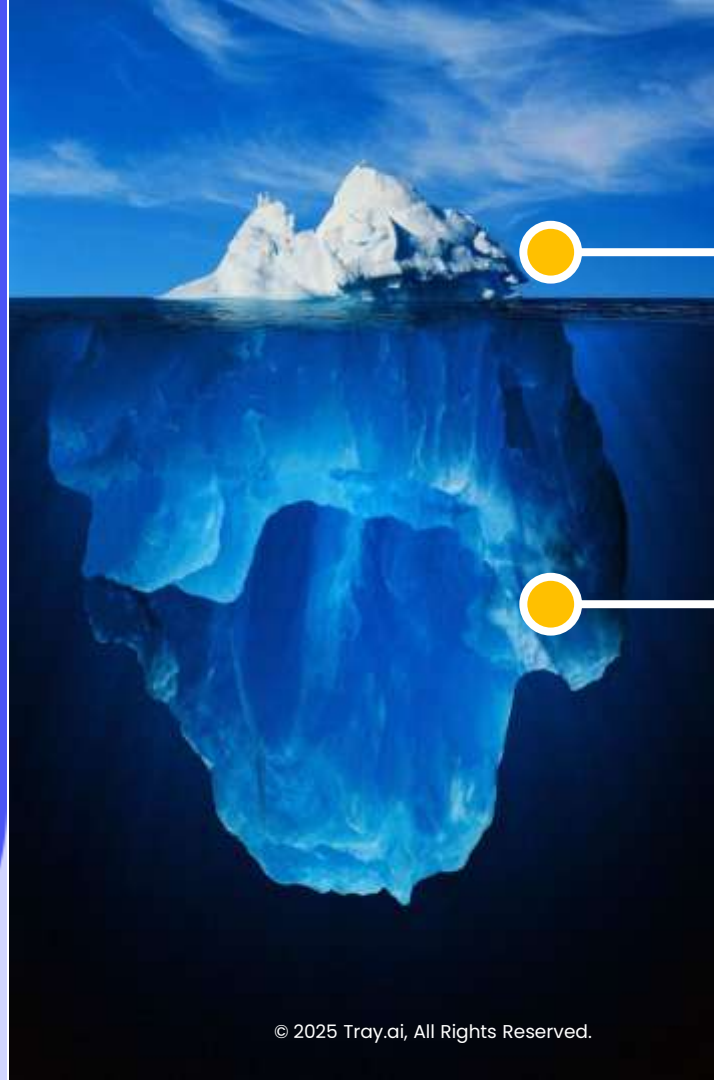
Shari Lava

Research Director



# 2025 prediction

Unchecked, production risks will sink success



## **“Quick” agent wins for LOB**

1. Knowledge agents
2. LOB conversational agents
3. Semi-autonomous agents

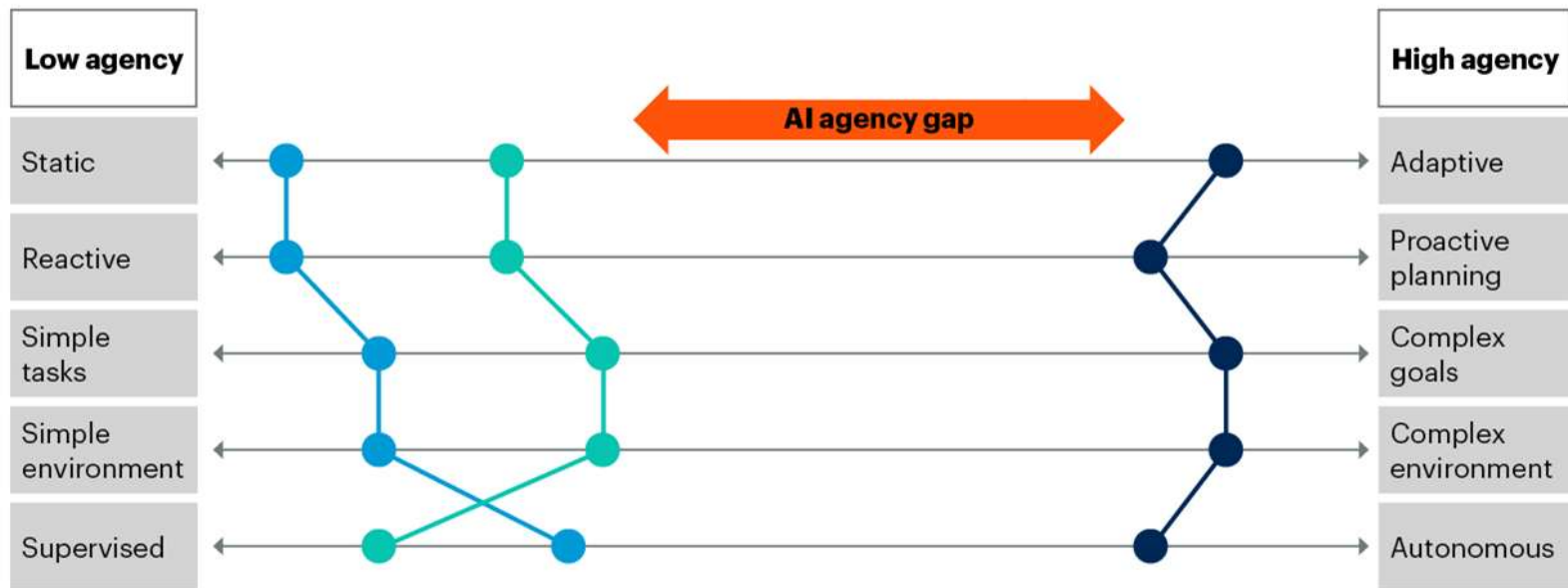
## **What 2025 looks like for IT**

- Prototype to production gap
- Data integration headaches
- More point tooling per agent
- Security and compliance risks
- Continuous LLM change
- Limited agent flexibility
- Change management
- Agent scalability
- Scope + Guardrails
- Testing and debugging
- Instrumentation and monitoring
- Retiring failed point tools



# Flexibility is crucial to avoid hitting a wall

● Human agency    ● Deterministic chatbots    ● LLM-based assistants



Gartner

# Unblocking agent obstacles



## Internal custom agent

- Costly and long dev.
- Difficult to repurpose
- Maintain single code base per use case
- Requires AI expertise
- Adds to technical debt



## Off-the-shelf agent

- Single use case
- Can't be repurposed
- Bloats tech stack
- Yet another vendor
- Limited integration



## Ecosystem Agents

Example: AgentForce

- Ecosystem-locked
- Lack of controls both on price and intelligence
- Limited flexibility
- Lose value if you move platforms



## AI-ready iPaaS

- Single platform
- Rapid build times
- Pre-built AI ready infrastructure
- Highly flexible
- Scales to 000s users
- Endless use cases
- Low cost development
- Integration built-in

# One platform: All AI and integration initiatives

## YOUR ORCHESTRATIONS

App integrations  
Automated processes  
Data syncs

## YOUR MICROSERVICES

RESTful APIs  
Microservices  
Event-based

## YOUR INTELLIGENT PROCESSES

LLM-infused  
Predictive-infused  
Operationalized DWs

## YOUR AGENTS

Chatbots  
Autonomous agents  
Assistants

## Tray Composable AI Integration Platform

Composable Development | Unified iPaaS | Merlin Intelligence | Enterprise Core

By 2029, 80% of enterprises with mature automation practices will pivot to a consolidated platform that orchestrates business processes and agentic automation

**Gartner**

## Composable development

### Universal low-code

Tray Build single low-code IDE for all iPaaS capabilities and intelligence

### Code-first development

Tray Code end-to-end APIs for connectivity and platform capabilities

### Chat digital assistant

Tray Chat natural language no-code on-demand automation

## Unified iPaaS Capabilities

### Automation and Orchestration

- High-fidelity workflows
- Code-grade logic
- Callable. Scriptable

### Data Integration

- Low-code Helpers.
- Tables and lookups
- Parallel processing

### API Management

- Composable REST API microservices
- Policy management

### Agile Connectivity

- Connectors. Any API.
- TypeScript CDK
- On-premise agent

### Integration Marketplaces

- Customer and employee self-service
- Guided. Rebrandable

## Merlin Intelligence

### Merlin Build

- NLP-based copilot
- GenAI documentation
- Suggestions
- Assisted testing\*
- AI debugging\*
- Field mappings\*

### Merlin AI Palette

- LLM connectivity
- Native VDB
- Sentiment
- IDP
- Classification
- Text extraction

### Merlin Agent Builder

- Guided Agent
- Agent Tools
- Scope + Guardrails
- RAG
- Slack/Teams
- Agent Accelerators

## Enterprise Core

### Governance

- Workspaces
- Projects
- SDLC

### Security

- RBAC
- Compliant
- SSO

### Elasticity

- Zero provisioning
- Dynamic processing
- Highly scalable

### Execution

- Step isolation
- Error-handling
- Observability

### Core AI Trust

- Merlin Guardian
- Anonymization
- Data safety

# Composable AI integration platform



# Agent Development

Foundational AI services to build flexible Agents

## Tray Agents

### Native Vector Tables

RAG processing and unstructured

### Merlin AI Palette

Text Analysis

### Native LLM Connectivity

Bedrock, OpenAI, Cohere, and Anthropic

### Merlin AI Palette

Text Generation

### Agent PIPs

40+ RAG, Guardrails, Safety, Slack, Knowledge

### Merlin IDP

Intelligent content extraction

### Step Isolation

Agent testing for prompt engineering

### Merlin Guardian

Data obfuscation and tokenization

Tray Platform  
Agent Enablers

# Flexible and powerful. Full agentic spectrum

## Conversational agents

- Sales enablement
- Virtual assistants
- Customer inquiries
- Meeting scheduling
- Employee onboarding
- Training support
- Helpdesk chatbots
- Lead qualification
- Internal queries
- HR assistance

## Semi-autonomous agents

- Invoice validation
- Expense approval
- Procurement workflows
- Customer escalations
- Contract approvals
- Supply planning
- HR candidate filtering
- Marketing personalization
- Financial planning
- Risk assessment

## Autonomous agents

- Customer support
- Invoice processing
- Fraud detection
- Expense management
- Dynamic pricing
- Inventory management
- Contract analysis
- Recruiting automation
- Supply chain
- IT incident response

# Agent accelerators built on platform

## Knowledge

### Agent

Web scraping  
Vector storage  
ingestion  
Web search

## Customer

### Ticketing Agent

CS best practice guide  
Search Zendesk tickets  
Create Zendesk ticket  
Comment on ticket

## IT

### Ticketing Agent

IT Best Practices Ref. Doc  
Search JIRA ticket  
Create JIRA ticket  
Comment on Jira ticket

## Sales

### Agent (2025)

Knowledge Indexing  
Internet search  
Draft email  
Search person in SFDC

## Tray Composable AI Integration Platform

Composable Development | Unified iPaaS | Merlin Intelligence | Enterprise Core



# Prompt-based Intelligent Document Processing

Enabler for agents to:

- Process sales orders
- Handle HR documents
- Manage payables

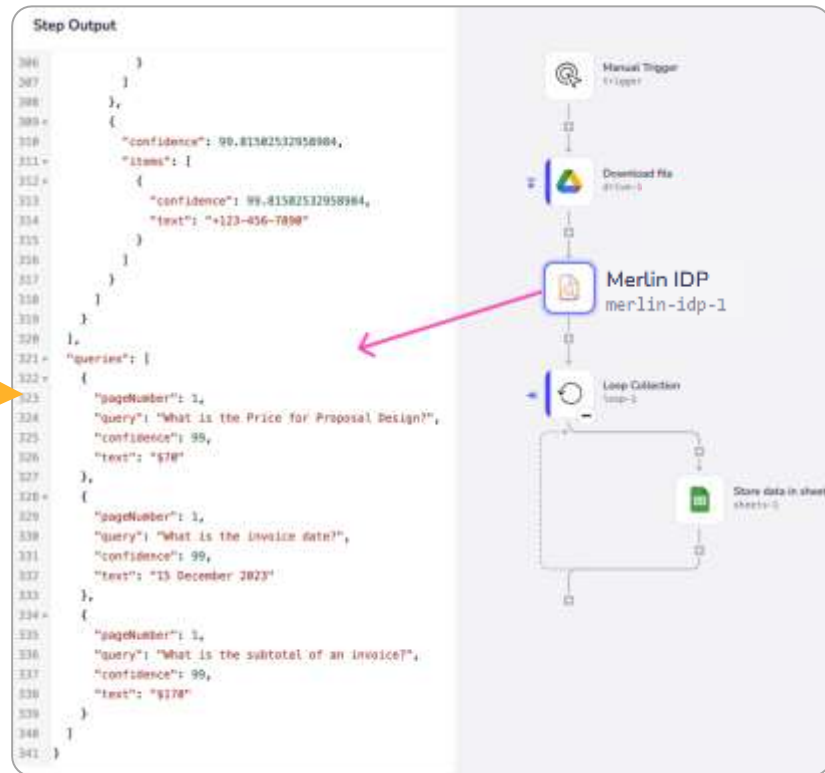


**INVOICE**

Invoice Date: 10 December 2023 Invoice To: MODERN BUSINESS

ITEM DESCRIPTION	PRICE
Magazine Design	\$50
Proposal Design	\$70
Brochure Design	\$30
Letterhead Design	\$20
<b>SUBTOTAL:</b>	<b>\$170</b>

**SEND PAYMENT TO** Bank No: Bank Name  
**CONTACT** hello@modernbusiness.com



# First to include native **Vector Storage**

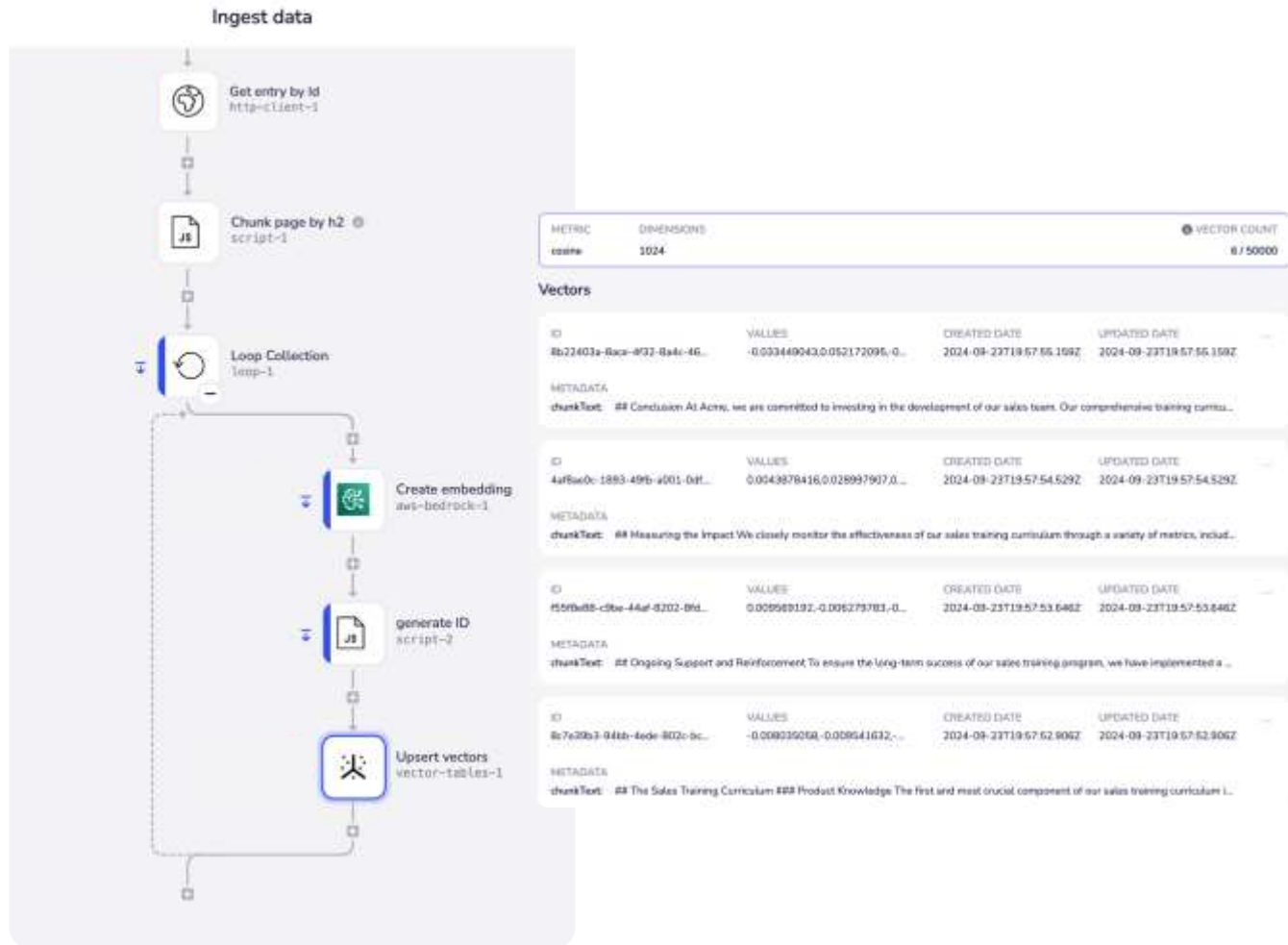
Foundational for:

Knowledge agents

Search

Unstructured data

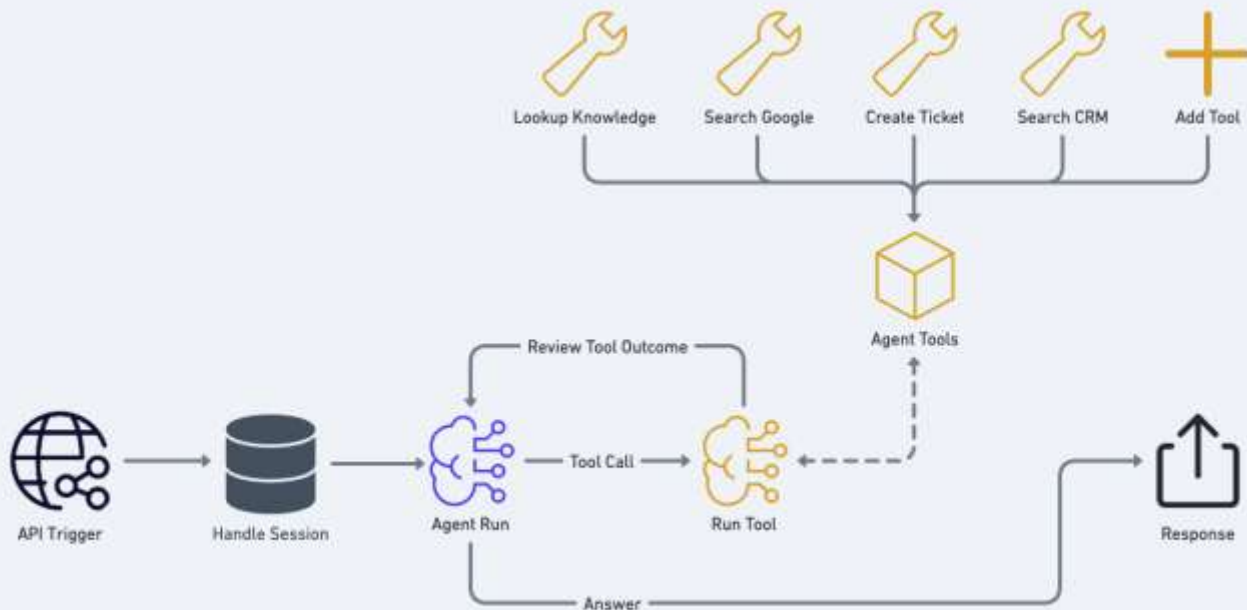
Recommendations



# Tray Agents powered by Agent Tools











Enables:

- Extensibility
- Customization
- Guardrails













# Out of the box Agent Tools. Fully extensible

## Pre-Built Agent Tools

-  Web search
-  Long term memory
-  Image analysis
-  Knowledge search
-  Employee lookup
-  Customer lookup
-  User lookup
-  Case lookup
-  Comments
-  Web scraping

## Build using platform services

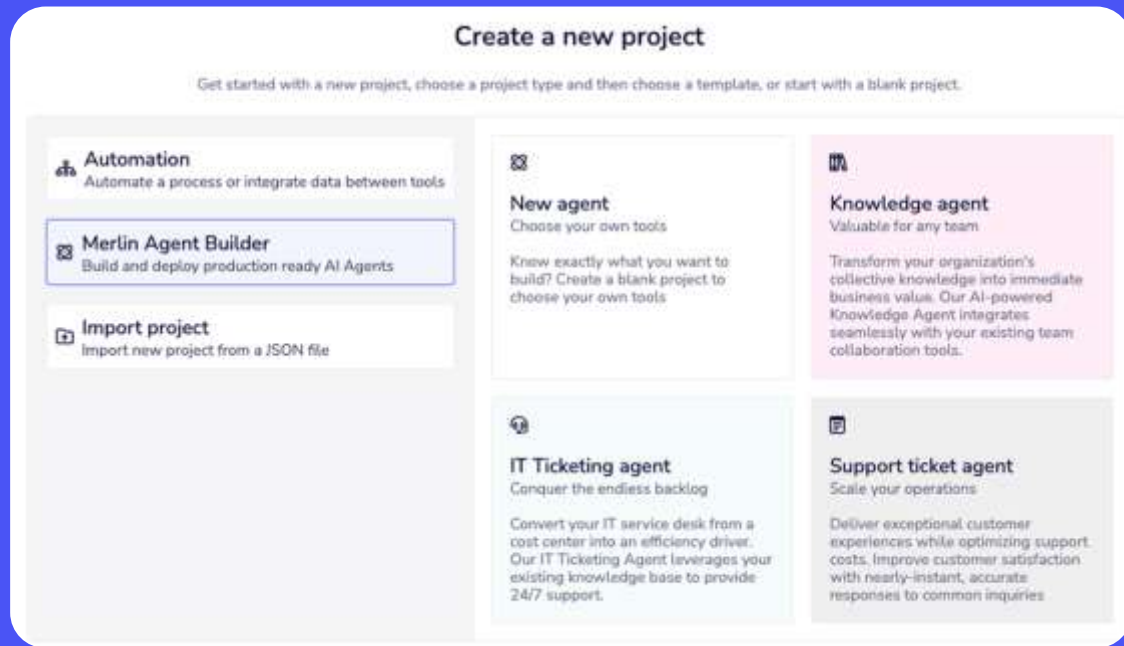
-  Query database
-  Transcript analysis
-  System health
-  Data tokenization
-  Escalation
-  Sentiment analysis
-  Assign priority
-  Prompt expansion
-  Hardware lookup
-  Self-reflection

**Tray Composable AI Integration Platform**



# Merlin Agent Builder

Create a New Custom Agent  
or use pre-built Tray Agent Accelerators

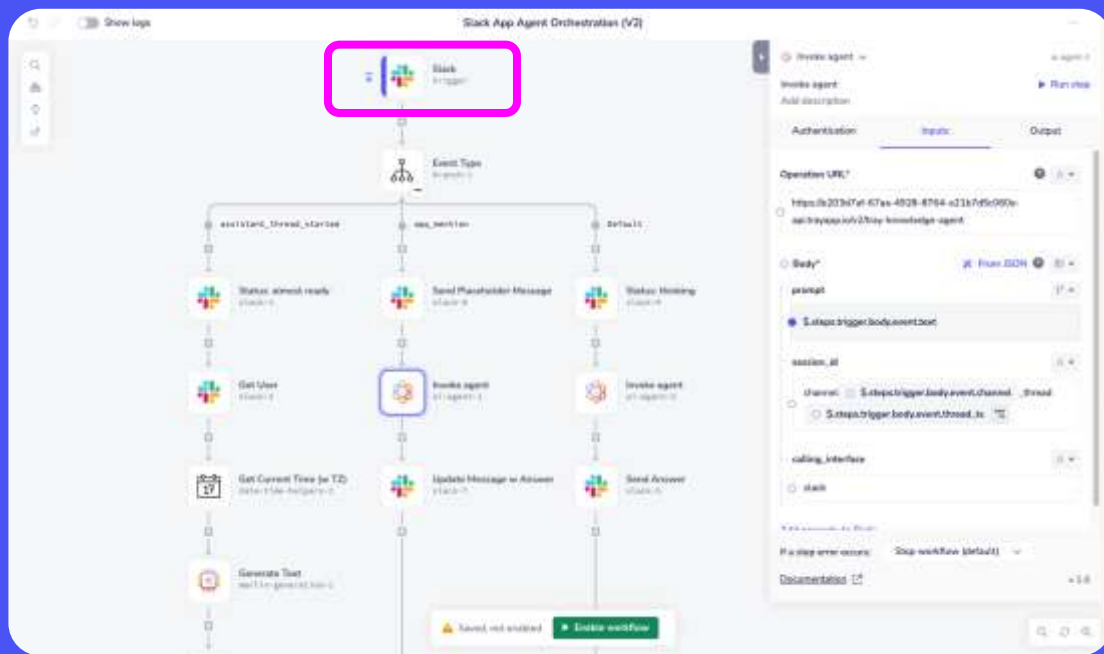


- Easily instantiate a New Agent using our 20+ pre-built Agent Tools including Search, Image Analysis, Knowledge Base, Memory, Lookup Operations
- Build Agent Tools from ground up if needed
- Or simply start with a Tray Agent Accelerator, authenticate, and customize as needed

# Plug agents into collaboration

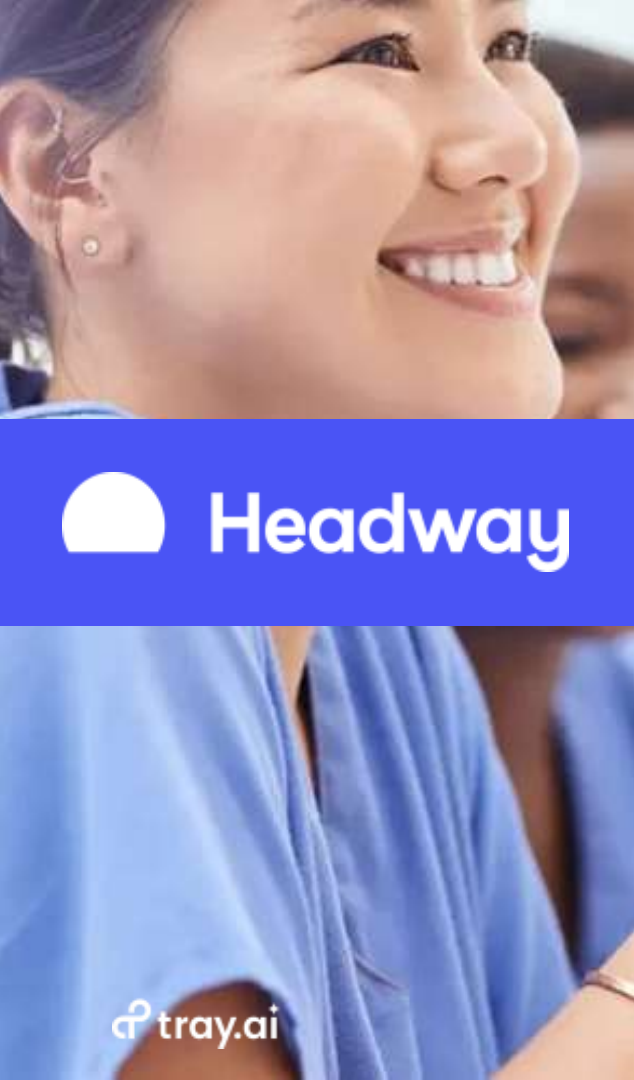
Expanded platform to provide  
agent-ready integration with Slack

- Direct integration with Slack
- Provides a high-degree of control about when and how Slack engages and responds



# Powerful agents. One platform

Component	Merlin Agent Builder	Alternatives
Agentic control	Visual orchestration	Limited
Connect agent to your stack	100s connectors. Extensible	Limited
Developer productivity	One IDE	Yet another IDE
Document processing	Included	Probably not
Security and management	One point	Yet another IT responsibility
Scalability	Proven elasticity	TBD



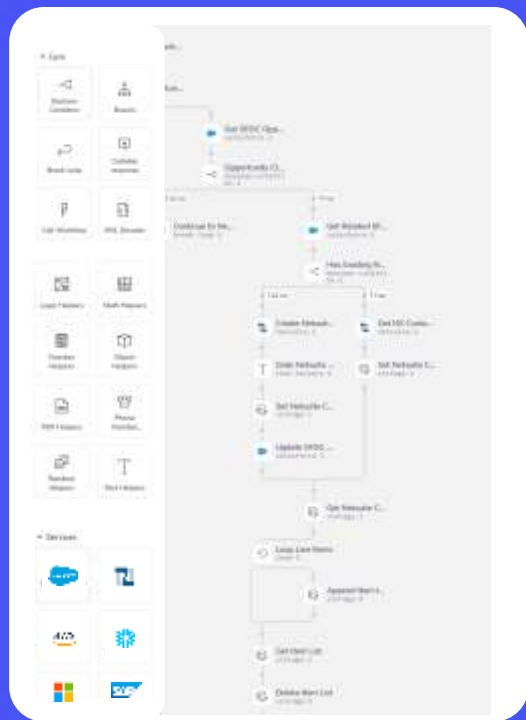
## Elevating IT productivity by automating IT service at Headway mental health

Rapidly growing mental healthcare system who connects patients to therapists, was under pressure to increase IT productivity who were getting buried with a staggering number of questions.

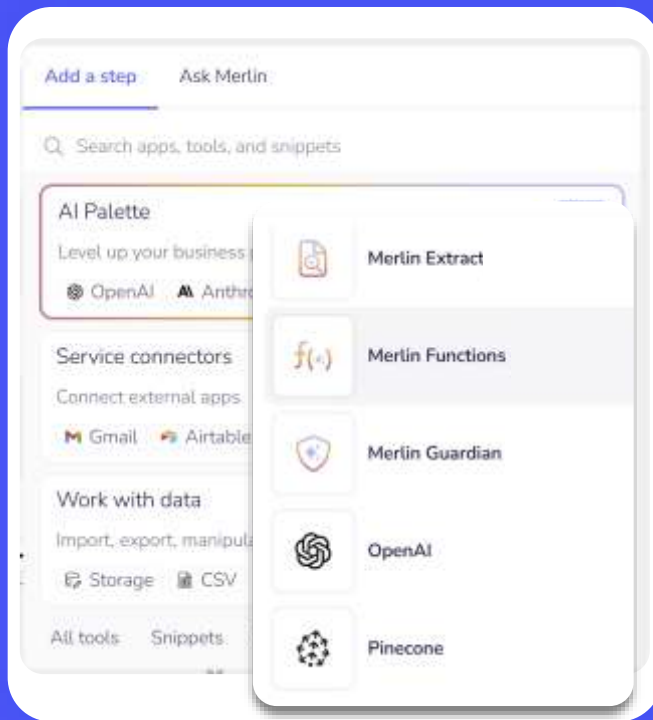
- Deploying Tray IT Ticketing Agents to autonomously handle IT tickets or route them for service
- Indexes knowledge using Tray Vector Tables and RAG
- Handles natural language questions and answers, categorizes, summarizes, and classified service tickets
- Directly integrates with Slack to answer service requests



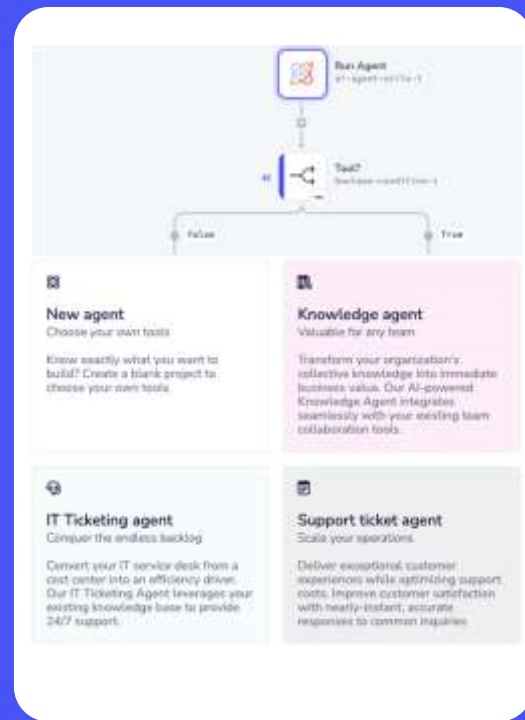
# ONE UNIFIED IDE FOR EVERY USE CASE



# AI INFUSION PALETTE BUILT INTO PLATFORM



# IN-PLATFORM AGENT BUILDER



# Agents for everyone. One flexible platform

- Prospect self-service
- Lead management
- Personalization

**Marketing agents**

- Sales knowledge
- Lead follow-up
- Contracting

**Sales agents**

- Order processing
- AR/AP management
- Procurement

**Finance agents**

- Employee self-service
- Recruiting
- Compliance

**HR agents**

- Knowledge
- Support self-service
- Lifecycle

**Service agents**

- IT ticketing agent
- Onboarding
- Provisioning

**IT agents**

- Development
- Integration
- Orchestration



- Connectivity
- Intelligence
- Management



 Claude

 cohere

 OpenAI



 Meta AI

 MISTRAL AI





# Demonstration





# Thank You



# Q&A

For More Information



**The fastest, safest, most flexible way to turn  
AI into business performance**

<https://tray.ai/>

## Tray.ai iPaaS for AI

Tray.ai AI-Ready Integration Platform

<https://tray.ai/universal-automation-cloud>

- AI-ready iPaaS
- AI-augmented builder
- Infuse AI into business processes
- Trusted AI data integration with governance and scale

## Explore AI Benefits

Gartner® Report: Top Strategic  
Technology Trends for 2025: Agentic AI

<https://www.gartner.com/doc/reprints?id=1-2J9MY6NO&ct=241104&st=sb>

Three Signs It's Time To Embrace AI  
and Modernize Traditional iPaaS

<https://tray.ai/report/think-beyond-traditional-ipaas>

ROI Report - How AVID Property Group  
Achieved 194% ROI

<https://tray.ai/report/roi-avid-property-group>

## Free Trial & More

**Request a Free Trial**

<https://tray.ai/request-trial>

**Tray.ai Interactive Demo**

<https://tray.ai/demo>

**Register for an Upcoming AI Agent  
Workshop**

<https://tray.ai/request-trial> <https://tray.ai/build-your-own-ai-agent>

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