

6/26/2026

Executive Review: Caterpillar AI Growth with Adobe

Mapping the Helios MCP connection and Adobe
AI LLM optimization path

Meeting Agenda

- 1. Account Overview and Strategic Context**
- 2. Helios MCP Integration and AI Implementation**
- 3. Execution Plan and Commitment**

Account Overview and Strategic Context

Why This Matters

Adobe is already embedded

- Caterpillar already runs Adobe across web, demand, workflow, testing, and measurement.

The whitespace is AI activation

- The missing layer is **generative and agentic AI** on top of today's footprint.

Healthy can still be risky

- Strong adoption plus flat AI usage becomes a renewal question, fast.

Executive goal for this quarter

- Move AI consumption from **zero to one** live, measured use case.

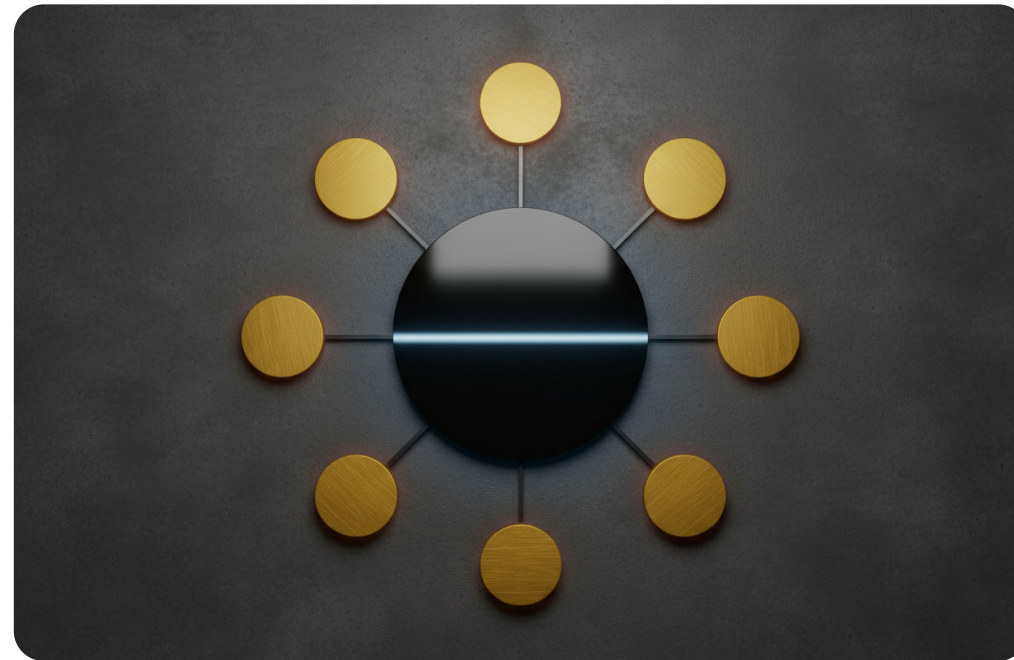


Cat in One View



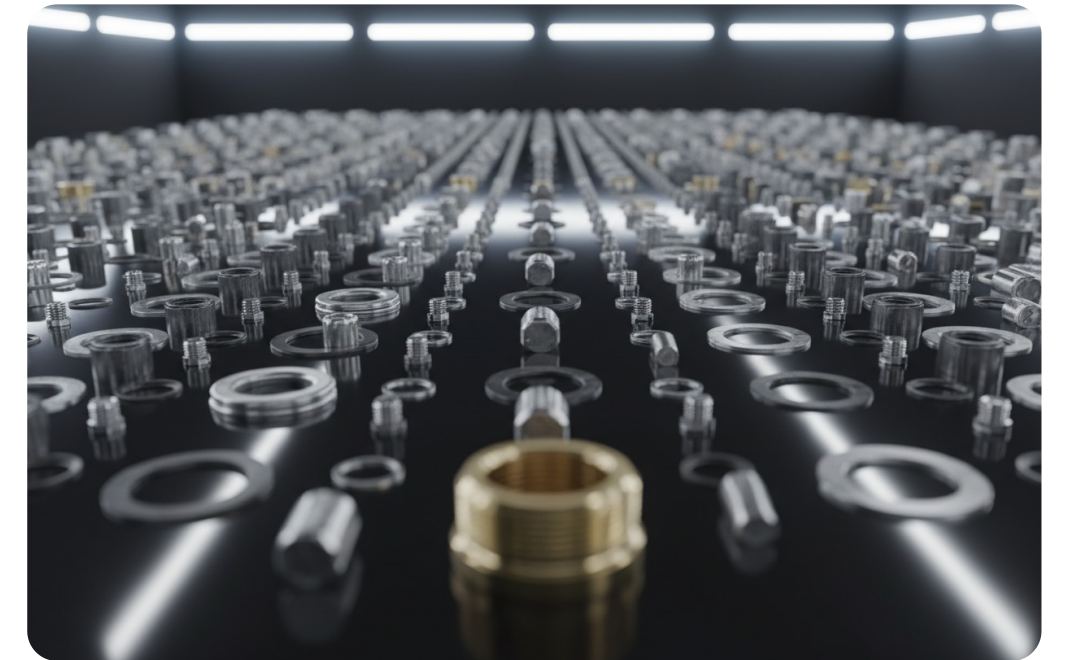
Business model and growth engine

- Caterpillar's razor-and-blades model depends on recurring services growth.
- Aftermarket parts and service are strategic, with a ~\$28B services goal.



Dealer-first go-to-market reality

- Independent dealers own the local customer relationship and execution.
- This drives constant tension: central brand control vs local autonomy.



Digital commerce at industrial scale

- parts.cat.com spans **1.4M+ parts** and exceeds **\$2B** annual sales.
- The CX challenge is scale: localization, routing, and governed content.

Adobe Footprint

Experience foundation

- AEM Sites runs cat.com and dealer-facing web experiences.
- AEM Assets is the governed library for parts and product content.

Demand + workflow engine

- Marketo drives B2B nurture toward dealer quotes and service demand.
- Workfront runs intake, approvals, and launch execution at scale.

Optimize + measure

- Target enables testing and personalization on key digital properties.
- Analytics measures behavior; CJA is the cross-channel expansion path.

Success plan accountability

- Ultimate Success must show measurable outcomes, not just coverage.
- This installed stack is the platform for the AI layer to activate.



Thesis: clear AI boundary

Draw a clean boundary

- Cat Digital owns **operational AI**: Helios, predictive maintenance, autonomy.
- Adobe does not compete there; we extend where Adobe already runs.



Own marketing + CX AI

- Adobe wins the AI layer for content, brand, demand, and measurement.
- That includes the generative and agentic layer: Firefly, GenStudio, agents.

Why this wins executives

- Conceding ops AI builds credibility with the new Head of AI.
- It reduces internal resistance by avoiding a “rip-and-replace” narrative.



Helios MCP Integration and AI Implementation

Helios to Adobe via MCP

Start with the demarcation line

Helios runs ops AI; Adobe runs CX AI

Expose Helios context safely

Share signals via Helios APIs for CX use

Connect through MCP

MCP lets agents interoperate, not silo

Orchestrate in Adobe

Agent Orchestrator plans; Adobe agents execute

Execute in Adobe workflows

AEM, CDP, Journeys, Analytics drive actions

Keep human-in-the-loop

Approve before publish or customer impact

MCP Flow: Helios to Adobe

Helios provides the context

- Helios contributes asset, dealer, and service signals via its APIs.
- Adobe uses this as context, without replacing Helios operations.

Agent Orchestrator plans the work

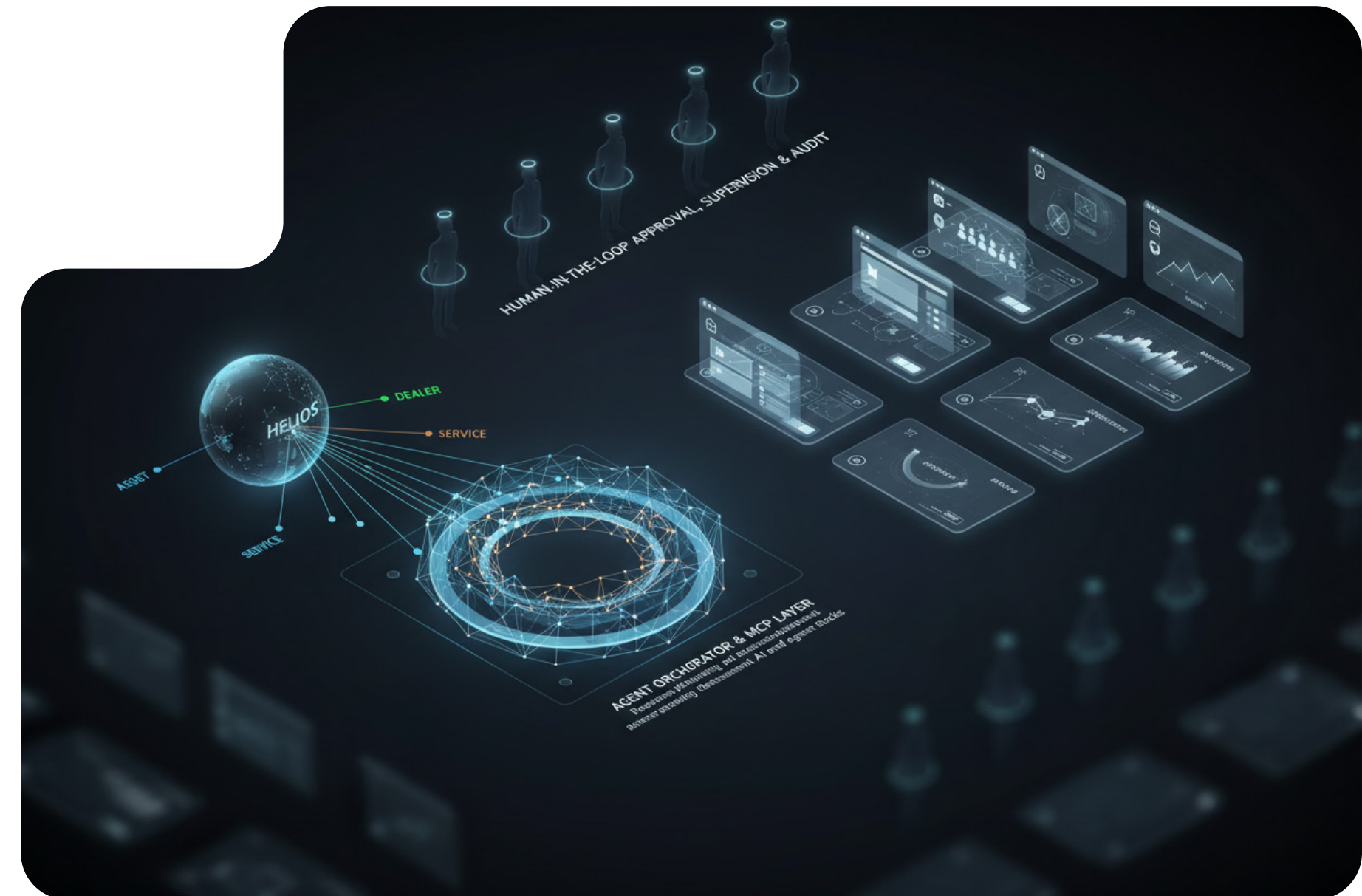
- A goal is submitted; Orchestrator selects and coordinates agents.
- MCP enables interoperability with Cat's chosen LLM/agent stack.

Adobe executes in CX systems

- Actions land in AEM, Real-Time CDP, Journeys, and analytics.
- Output is marketing and experience change, not operational control.

Human-in-the-loop governance

- Agents recommend and draft; people approve publishing and outreach.
- Governance, supervision, and audit stay centralized in Adobe.



First AI Wins

→ 01

Lighthouse win: dealer creative

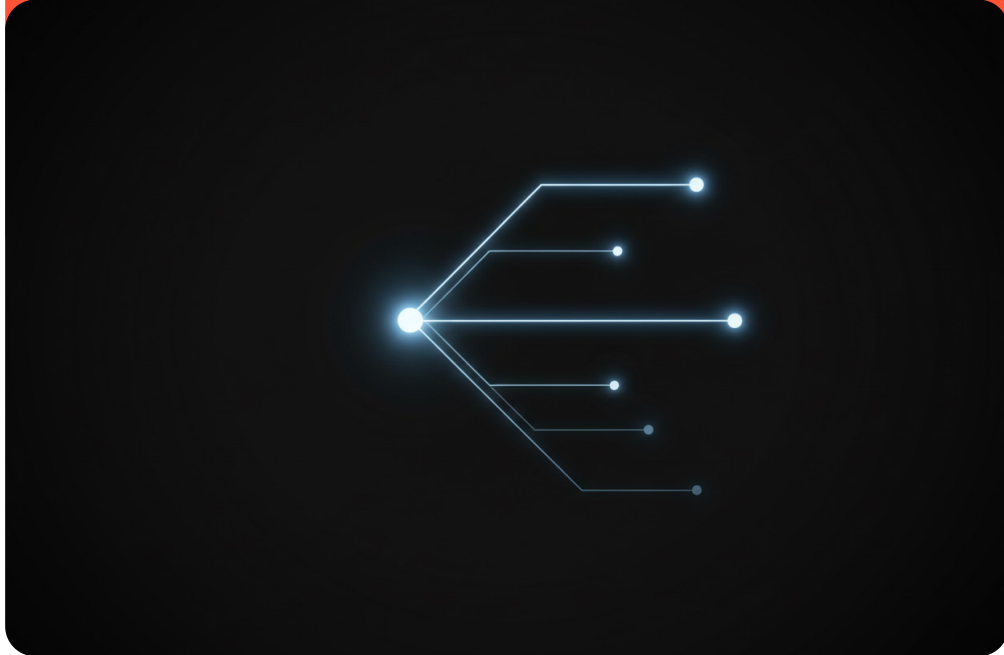
- Use Firefly Custom Models to generate brand-true dealer variants fast.
- Activate GenStudio to produce, deploy, and learn which creative converts.



→ 02

Second win: lead routing at scale

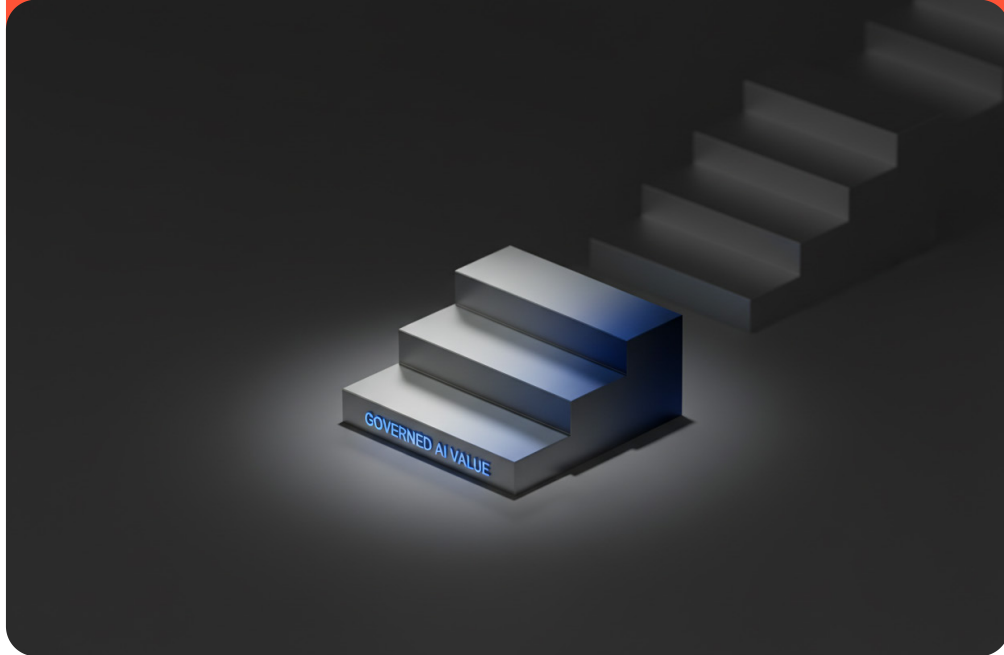
- Apply Real-Time CDP B2B scoring to prioritize and qualify buying groups.
- Use Account Qualification and Audience agents to route to dealers.



→ 03

Why these two first

- They match dealer complexity and show visible results quickly.
- They prove **governed AI value** without touching operational Helios AI.



LLM Search Defense

Make Cat citable in AI answers

- Use **Adobe LLM Optimizer** to track citations and visibility in AI assistants.
- Identify gaps where competitors or marketplaces show up instead.

Focus on the highest-value content

- Prioritize parts.cat.com pages, machine specs, and configurator content.
- Optimize owned content that drives aftermarket demand and dealer leads.

Turn insights into governed changes

- Pair with **AEM Sites Optimizer** to implement fixes with approvals.
- Measure lifts in AI-referred traffic and on-site conversion outcomes.



Execution Plan and Commitment

90-Day Activation Plan

Days 1–30: Baseline + alignment

- Confirm what is live, ignored, and not activated in the entitlement.
- Establish stakeholder cadence and QBR scorecard methodology for scrutiny.
- Set the zero baseline for **AI consumption** and readiness gaps.

Days 31–60: Commit the lighthouse

- Select one bounded use case that moves the AI-from-zero metric.
- Name owners, governance gates, and success metrics tied to outcomes.
- Lock the execution path using Ultimate Success expert engagements.

Days 61–90: Launch + prove value

- Go live with human-in-the-loop controls and auditable operating rhythm.
- Report results in Caterpillar terms: speed, cost per asset, routing impact.
- Prepare next QBR to review **AI consumption**, velocity, and attribution.

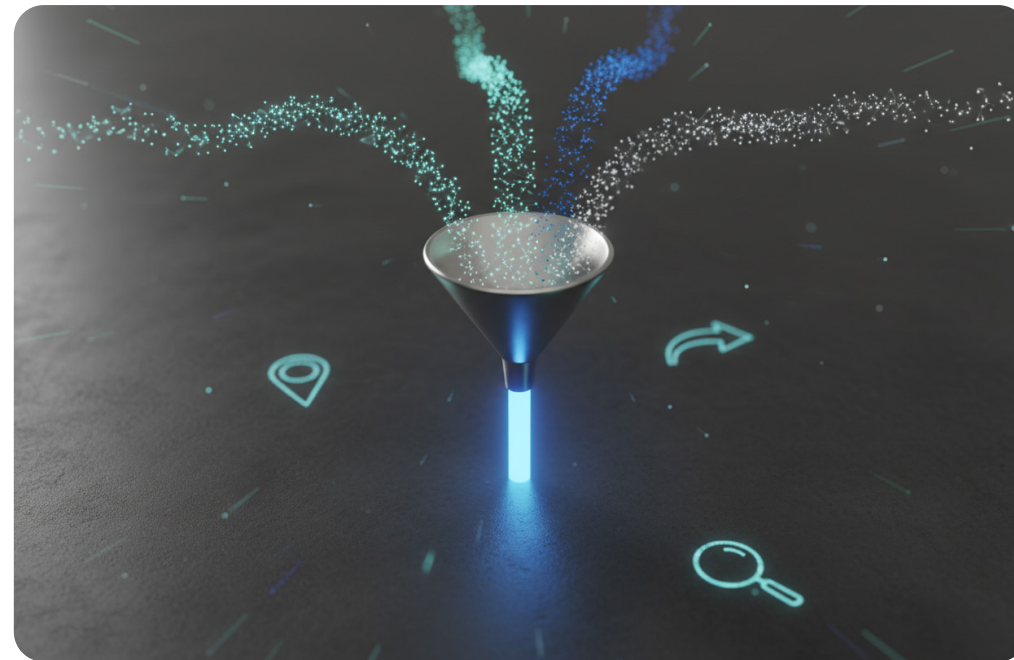


Close and commit



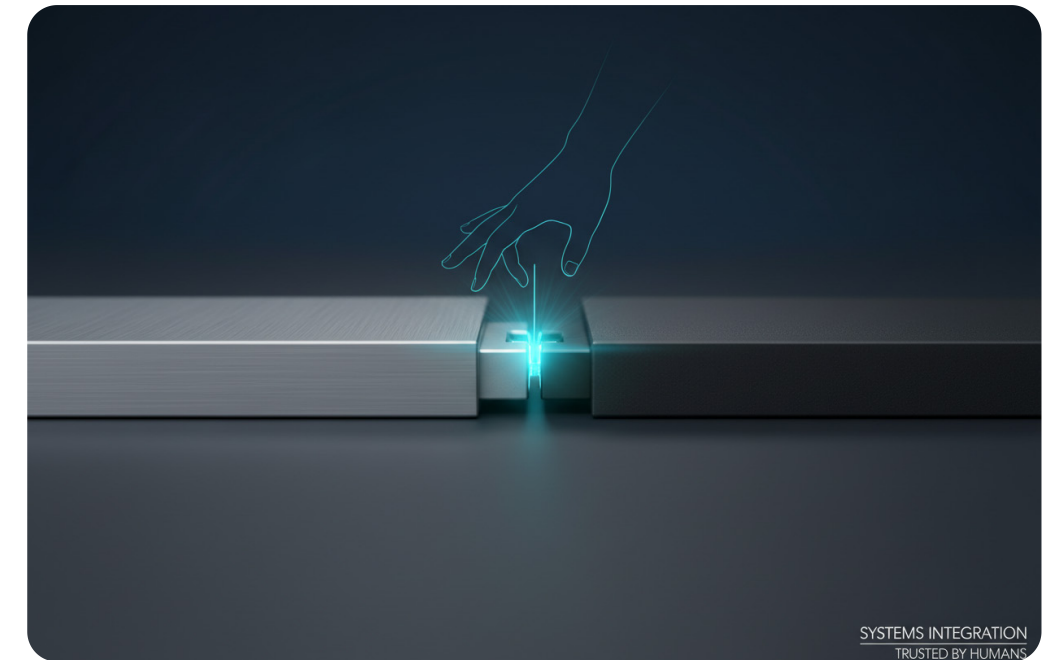
Decision and metric

- Agree the QBR metric: AI consumption moves off the **zero baseline**.
- Confirm one lighthouse use case, with owners, dates, and governance.



How we will prove value

- Show outcomes in business terms: dealer reach, faster localization, brand compliance.
- Quantify experience impact: better routing, higher conversion, fewer journey drop-offs.
- Track discoverability: improved AI-search visibility for parts, specs, configurators.



Interoperability commitment

- Use **MCP** so Adobe agents interoperate with Helios, not compete.
- Keep a human in the loop before publishing or customer-facing actions.