

EXECUTIVE BRIEFING · REDEAPP

# The Frontline Operating *System.*

The strategic narrative for the 80% of enterprise workers who don't sit at a desk — why two decades of software investment missed them, why the incumbent approaches keep failing, and what changes when the frontline gets a system of record of its own.

## Four claims, one document.

Most of the enterprise software estate was built for the quarter of the workforce that sits at a desk. This brief is about everyone else — and about the system of record that population has been missing. It is written to be read in one sitting. Everything in it is sourced: every customer is named, every number is network telemetry, and every economic constant is published methodology.

**01 RedeApp sits alongside the HCM and ERP platforms as the system of record for frontline employees.** Not an overlay on systems built for the desk — a peer system, covering the population those platforms were never architected to reach, and interoperating with them rather than replacing them.

**02 Fifteen years architected for the frontline, from the ground up.** The incumbents approach mobile work as an extension of a desk product — a tab, a module, a bolt-on. RedeApp has never been anything other than frontline infrastructure, and the architecture shows it: identity, distribution, and accountability designed for people with no desk, no corporate email, and no managed device.

**03 AI has finally made the frontline economically addressable — and usage decides who delivers it.** Agents are only as competent as the operational record beneath them and only as valuable as their reach. No other system carries the adoption pedigree — 80–96% across named, citable deployments — required to deliver AI’s benefits to the edge, securely.

**04 The core function creates the usage. The platform then extends to everything else.** Communication people actually use comes first; identity, security, and governance ride along intuitively rather than being retrofitted. That ordering — usage first, extension second — is the strategic argument of this document.

### ¶ HOW THE DOCUMENT READS

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# The largest workforce in the world has the least software.

**2.7B**

DESKLESS WORKERS GLOBALLY — THE LARGEST UNDERSERVED LABOR MARKET IN THE WORLD

**~80%**

SHARE OF THE GLOBAL WORKFORCE THAT WORKS AWAY FROM A DESK

**2 decades**

OF ENTERPRISE SOFTWARE INVESTMENT CONCENTRATED ON THE DESK-BOUND MINORITY

Roughly eight in ten working people on earth do their jobs away from a desk — on hospital floors and construction sites, in kitchens, casinos, care communities, distribution centers, plants, and fleets. Emergence Capital, which coined the category, quantified the imbalance years ago: the deskless 80% of the workforce has historically attracted a small fraction of enterprise software investment, while SaaS spending compounded around the 20% who sit in front of monitors.

The reason is structural, not negligent. Seat-based SaaS assumes things the frontline doesn't have: a corporate email address to log in with, a managed device to install on, an SSO directory entry that matches a single clean identity, and a desk where the dashboard gets opened. A nurse's aide carries a badge number, a clock-in number, and a regional HRIS record that don't reconcile. A line cook has a personal phone and no inbox. The unit economics of the application layer simply never closed at the edge — so the edge got paper, word of mouth, and a long tail of point apps nobody logs into.

The consequence is that frontline operations run without an operational record. There is no canonical account of what was communicated to whom, what was acknowledged, what happened on the floor. In knowledge work, that record exists across email, calendars, CRM, and document systems. At the frontline it has simply never been built — *the problem was never a missing UI; it was a missing operating system.*

What changes now is the economics. AI makes the frontline addressable for the first time — agents can deliver answers, workflows, and institutional knowledge to a phone in a pocket at near-zero marginal cost, in any language, on any shift. The value that was always latent in these populations — safety, retention, throughput, quality of care and service — is finally extractable. But only for organizations that have the foundation underneath: a system that knows who everyone is, reaches all of them accountably, and records what happens. Industries that have been operationally stagnant for decades finally have a reason to move — and a hard requirement to move on.

Deskless workforce sizing per Emergence Capital's Deskless Workforce research ([emcap.com/thoughts/deskless-workforce](https://emcap.com/thoughts/deskless-workforce)). Industry framing per the RedeApp Strategic Vision and the analyst briefing "*When AI Eats SaaS, Who Owns the Frontline?*" (V1, May 2026).

## Each one solves a slice. None of them solve the *operating-system* problem.

Three categories of vendor have approached the frontline. Each carries a structural limitation it cannot engineer its way out of, because the limitation is the business model.

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### APPROACH ONE

#### **HCM extensions — Workday, ADP, SAP, Oracle, UKG**

The HCM owns payroll, scheduling, and the employment record — and treats engagement as a checkbox on a much larger contract. The frontline module is a tab inside a desk product: workers logging in occasionally, through an interface built for HR administrators. Engagement becomes a feature, not a habit. The workflow ownership is real; the relationship with the worker never materializes.

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### APPROACH TWO

#### **Communications platforms — Beekeeper, Blink, Staffbase**

Purpose-built messaging for the frontline, without the rest of the operating system. No identity fabric that reconciles badge numbers against HRIS records; no operational system of record with accountability built in; no agentic layer grounded in the organization's own documents and systems. Channel-based messaging replicates email's defining failure at the edge — opt-in participation — and stops at the conversation, just when the work begins.

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### APPROACH THREE

#### **EXP wrappers — Microsoft Viva and the intranet heirs**

Employee-experience layers assume the Microsoft estate underneath: an email address, an SSO identity, a managed device, a desk habit. That assumption holds for the 20% and quietly excludes the 80%. The frontline worker is reachable only after acquiring the very prerequisites — license, identity, device posture — whose absence defines the frontline in the first place.

The deeper pattern shows up when you ask what AI does to each layer of the SaaS stack: the three approaches compete on exactly the layers AI is *compressing* — and the layers the frontline is missing are the ones it makes *more valuable*.

SAAS LAYER	UNDER AI	WHY
Point-tool UIs — forms, dashboards, tickets	<i>Compressing</i>	Absorbed into conversational and autonomous interfaces; seat licenses lose justification when no one opens the app.
Workflow logic and business rules	<i>Compressing</i>	Agents execute rule-based workflows once context is structured. A workflow engine alone is exposed.
Vertical content and templates	<i>Compressing</i>	Generated rather than purchased.
Systems of record — operational and behavioral data	<i>Appreciating</i>	Agents are only as competent as the data grounding them. Whoever holds the record holds the agent's competence.
Identity, access, and integration fabric	<i>Appreciating</i>	Agents acting for workers need a permission model the enterprise trusts, and a clean plane into the systems they touch.

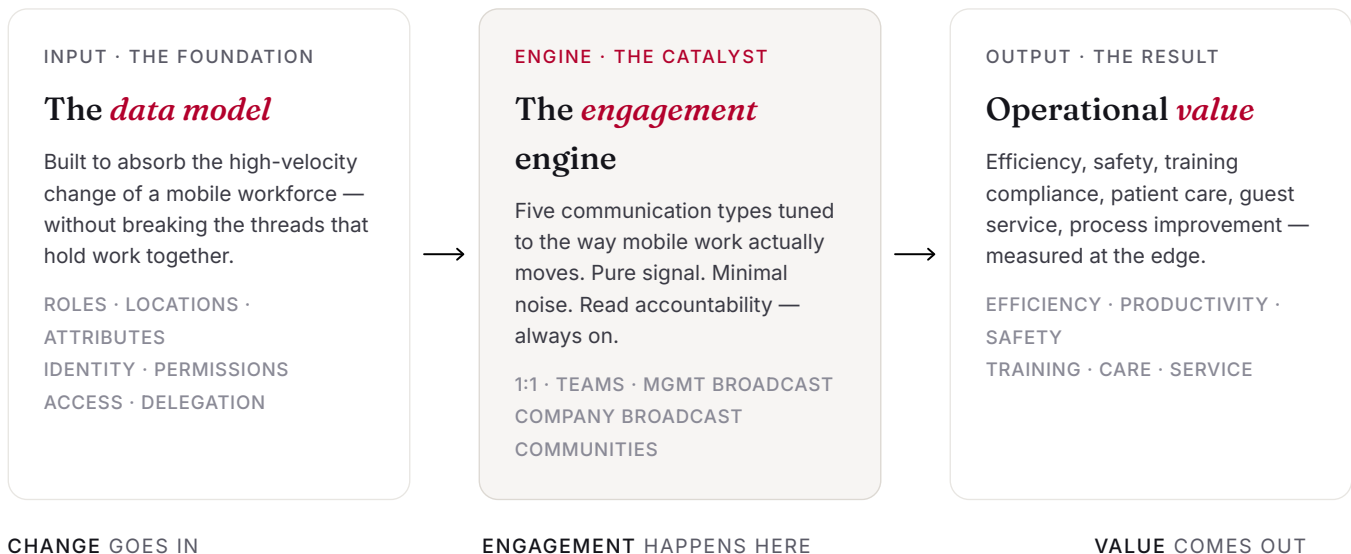
*The question for the next planning cycle is not “how much SaaS gets killed.” It is “who ends up holding the layers that appreciate” — the record, the identity, the integration plane.*

**AT THE FRONTLINE, THOSE LAYERS WERE NEVER BUILT.** BUILDING THEM IS THE THESIS — SECTION 03.

# A system of record for the people who do the work.

The claim, stated plainly: *RedeApp sits alongside the HCM and ERP platforms as the system of record for frontline employees.* Workday or SAP remains the record of employment; the ERP remains the record of the business. RedeApp is the record of the frontline operation itself — who is in scope, what reached them, what they acknowledged, what is happening on the floor — interoperating with the enterprise stack rather than competing with it.

The architecture has three moving parts, and the order matters. A data model built to absorb the constant change of a mobile workforce — roles, locations, attributes, identity, permissions, delegation — feeds an engagement engine tuned to how mobile work actually moves. Operational value comes out the other side, measured where the work happens. Change goes in; engagement happens in the middle; value comes out.



The engagement engine is deliberately constrained. Five communication types — 1:1 messages, team messaging, management broadcasts, company broadcasts, and communities that reach internal *and* external members of a work ecosystem — each tuned to a specific operational job, with read accountability on by default for everyone in scope. Channel-based tools are built for opt-in participation; mobile work cannot wait for someone to decide to look.

**PRINCIPLE 01**

Pure *signal*. The format names the job — so the wrong message can't be sent the wrong way.

**PRINCIPLE 02**

Minimal *noise*. No channel sprawl. No "did you see this?" Five types. That's it.

**PRINCIPLE 03**

Broad *accountability*. Read rates are on — always — for everyone in scope. Not opt-in. Not one-way.

This is the ordering the rest of the document depends on: *the core function exists to create the usage*. Everything else — the intelligence, the integrations, the governance — rides on a surface the workforce already opens every day.

# Three pillars. One operating system.

## PILLAR 01 · THE FOUNDATION

### A communication system of record

Not another messaging app — an operational record of what was communicated, to whom, in what scope, with what acknowledgment, in what language. That record is generated only by being in production. Once an organization has years of accumulated frontline signal — read receipts, acknowledged safety procedures, training completions, shift-level communications — the asset cannot be reproduced from the outside. It is the substrate on which agents become competent.

FIVE COMMUNICATION TYPES · READ ACCOUNTABILITY · DIGITAL FORMS · MULTILINGUAL DELIVERY

## PILLAR 02 · THE INTELLIGENCE

### Shelbe — agentic AI grounded in your operation

Shelbe is trained on the customer's own documents and systems, returns cited and permission-gated answers, speaks the workforce's languages natively, and runs configurable workflow agents with human-in-the-loop governance. The Agent Hub turns the long tail of frontline processes — call-offs, incident reports, safety checks, guest requests, care handoffs — into governed agents on the surface workers already use.

SHELBE · AGENT HUB · WORKFLOW AGENTS · HUMAN-IN-THE-LOOP GATES · SECURE SURFACE AI

## PILLAR 03 · THE ECOSYSTEM

### Identity, sync, and the integration plane

RedeKey unifies any identifier — badge number, clock-in number, contractor record, HRIS ID — into one access fabric. AutoSync ingests from any HRIS and propagates change across the platform in real time. The App Hub, with Authorization Forwarding, keeps workflow ownership where it lives — in Workday, UKG, SAP, ServiceNow — while RedeApp carries the engagement. API and MCP connectivity collapse the integration plane into a single conversational surface.

REDEKEY · AUTOSYNC · APP HUB · AUTHORIZATION FORWARDING · API + MCP

None of this was assembled last quarter to catch a wave. RedeApp has spent *fifteen years* architecting for the frontline from the ground up — the data model, the identity fabric, and the distribution surface predate the agentic era they now anchor. Incumbents are bolting frontline modules onto desk platforms; RedeApp is extending a frontline platform toward everything else. The direction of travel is the moat.

*The moat is not algorithmic — it is structural: data, identity, integration, and distribution. Those are the layers that appreciate as point SaaS commoditizes.*

WHEN AI EATS SAAS, WHO OWNS THE FRONTLINE? · ANALYST BRIEFING · MAY 2026

## Real numbers. Named executives. Citable.

Every figure below is RedeApp network telemetry, current as of April 2026. Every customer is named with permission, and references are available in procurement.

### Trilogy Health Services

SENIOR LIVING · REIT-OWNED OPERATING PLATFORM

Chefs, cooks, facility managers, PRNs, and CNAs — the people who deliver care across Trilogy’s campuses — don’t sit at desks and don’t have company email. They never will. Trilogy, now a wholly-owned operating platform of American Healthcare REIT, runs its frontline communication on RedeApp — and has for years, at portfolio scale.

<b>19,535</b> EMPLOYEES ACROSS THE PORTFOLIO	<b>155</b> CAMPUSES ON ONE COMMUNICATION LAYER	<b>134M+</b> ALL-TIME MESSAGES READ BY THE FRONTLINE	<b>2.4M</b> MESSAGES READ IN APRIL 2026 ALONE
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*“RedeApp is the cornerstone upon which our company’s culture is built... a powerful tool our leadership can use to build relationships with the employees they serve. This leads to higher retention, better care for our residents, and ultimately, a return on our investment.”*

**RANDY BUFFORD** · FOUNDER & CEO, TRILOGY HEALTH SERVICES

### Hard Rock International

HOSPITALITY & GAMING · 24/7 OPERATIONS

Dealers, servers, hosts, and housekeepers across Hard Rock’s North American network sit on the far side of a digital cliff — no corporate email, no desk, a smartphone in the pocket. Adoption isn’t mandated; it’s chosen. Shelbe AI is now rolling out across the network on the surface those team members already use.

<b>20,485</b> MONTHLY ACTIVE USERS ACROSS THE NORTH AMERICAN NETWORK	<b>57.9%</b> 30-DAY MESSAGE READ RATE NETWORK-WIDE	<b>2.2M+</b> ALL-TIME CLICKS ACROSS THE IN-APP INTEGRATION HUB	<b>94%</b> OF TEAM MEMBERS HAVE PUSH NOTIFICATIONS ENABLED
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## Legend Senior Living

SENIOR LIVING · MULTI-STATE

Corporate communication at Legend has to land consistently across facilities run by different regional directors, in different cultures, under different state regulatory regimes. The HCM doesn't handle that; the intranet doesn't reach the floor. Legend solved it with one communication layer — and a deep UKG scheduling integration that puts schedules on the same surface as the conversation.

<p><b>84%</b> ADOPTION ACROSS ~2,000 EMPLOYEES</p>	<p><b>75%</b> ADOPTED WITHIN THE FIRST 7 DAYS OF ROLLOUT</p>	<p><b>UKG</b> SCHEDULING INTEGRATION — SHIFTS ON THE ENGAGEMENT SURFACE</p>
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*“Immediate, direct line to the frontline. Meaningful, familiar associate communication.”*

DAN LOON · VP ASSOCIATE ADVANCEMENT & EDUCATION, LEGEND SENIOR LIVING

## East & Westbrook Construction

COMMERCIAL CONSTRUCTION · MULTI-STATE FIELD OPERATION

A field workforce on paper forms moved its safety and operations signal onto one feed — including the “Good Catch” safety-incident report, now submitted digitally from the field. The word-of-mouth phrase inside the company is “I just RedeApp’d you.” The phrase they report hearing far less: “I didn’t know that.”

<p><b>80%+</b> ADOPTION ACROSS THE WORKFORCE</p>	<p><b>96%</b> OVERALL MESSAGE READ RATE</p>	<p><b>1,000+</b> DIGITAL FORMS SUBMITTED, INCL. SAFETY REPORTS</p>
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## Cumberland Valley

SINGLE-SITE PROOF OF PATTERN

The pattern holds at every scale: at a single 120-employee site, adoption crossed 90% — the same usage-first dynamics that carry a 155-campus portfolio, compressed to one building.

<p><b>90%+</b> ADOPTION AT SINGLE-SITE SCALE</p>	<p><b>120</b> EMPLOYEES — PROOF THE MODEL NEEDS NO MINIMUM SCALE</p>	<p><b>5</b> NAMED CUSTOMERS IN THIS BRIEF — REFERENCES AVAILABLE</p>
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Source: RedeApp network telemetry, April 2026. Full case studies with deployment detail at [redeapp.com/enterprise/proof](https://redeapp.com/enterprise/proof). Adoption is measured as activated accounts over eligible headcount; read rates as confirmed reads over delivered messages in the stated window.

## Agents your counsel can sign off on.

Generic LLMs and HCM AI add-ons fail the frontline for the same reason in opposite directions: the chatbot has no grounding in your operation, and the HCM agent has no reach into your workforce. An agent that hallucinates policy on a hospital floor is not a productivity tool — it is a liability with a conversational interface.

The architectural requirements for AI in regulated, frontline-heavy industries are now legible — in HIPAA enforcement, in the EU AI Act's risk tiers, in what CISOs and works councils actually approve. Four of them are non-negotiable. *Grounding*: answers must derive from the customer's own documents and systems, not the open internet's recollection of them. *Citation*: every answer must show its source, so a supervisor can verify rather than trust. *Permission gating*: the agent must answer within the asker's scope — what a regional director can see, a new hire cannot. *Human-in-the-loop governance*: consequential actions route through a gate where a person approves, rejects, or escalates before anything irreversible happens.

Shelbe was architected to those requirements rather than retrofitted toward them — grounded in customer-private documents, cited by default, permission-gated through the same identity fabric that governs every message, and governed through human-in-the-loop gates on consequential workflows. Secure Surface AI

is the distribution half of the same argument: identity-aware delivery that puts governed intelligence on the worker's phone without putting the enterprise's data at the model's mercy.

Beneath both sits the system-of-record argument from Section 03. An agent is only as competent as the operational record that grounds it — who works where, what was acknowledged, what is happening on the floor. That record cannot be retroactively assembled, and it cannot be made trustworthy by adding model parameters. Sovereignty over frontline AI belongs to whoever holds the record and the reach.

Which is why usage is the security model as much as the adoption story. AI parked in a portal nobody opens delivers nothing — safely. AI delivered on a surface with 80–96% adoption and read accountability delivers value *and* an audit trail. The pedigree that ensures usage is the same pedigree that makes the deployment defensible to the CIO, the CISO, the CHRO, and the General Counsel on day one.

### What “sovereign” means in practice

Your documents ground the answers. Your identity fabric scopes them. Your people gate the actions. Your audit trail records all of it. The model is replaceable; the governance plane is yours — and it lives where your workforce already is.

## We publish the math.

Every constant below is published methodology at [redeapp.com/enterprise/proof/methodology](https://redeapp.com/enterprise/proof/methodology) — the formula, the constants, and where the inputs come from. Strong vendors publish their analysis; the analysis is part of the product.

<p><b>16%</b></p> <p>REPLACEMENT-COST MULTIPLIER — COST TO REPLACE A FRONTLINE WORKER, AS SHARE OF ANNUAL WAGE</p>	<p><b>\$240</b></p> <p>ANNUAL PLATFORM COST PER EMPLOYEE — THE NUMBER THE SAVINGS HAVE TO CLEAR</p>	<p><b>4</b></p> <p>PUBLISHED RETENTION TIERS — 1.5% · 3% · 5% · 10% OF WORKFORCE RETAINED</p>
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Retention is the anchor calculation. Frontline turnover runs 35–75% annually depending on industry; each replacement costs roughly 16% of annual wage in recruiting, onboarding, and lost productivity. The platform’s effect — documented in Section 04 — is to retain a share of the workforce that would otherwise have left. At a stated \$40,000 average frontline wage, each retained worker is worth \$6,400. The four tiers below are deliberately conservative brackets; Trilogy’s leadership attributes retention gains directly to the platform in their own words on page 8.

WORKFORCE SCALE	1.5% TIER — CONSERVATIVE	3% TIER — MODERATE	5% TIER — PLATFORM TARGET	10% TIER — ENTERPRISE	ANNUAL PLATFORM COST
2,000 employees	\$192K	\$384K	<b>\$640K</b>	\$1.28M	\$480K
10,000 employees	\$960K	\$1.92M	<b>\$3.20M</b>	\$6.40M	\$2.40M
20,000 employees	\$1.92M	\$3.84M	<b>\$6.40M</b>	\$12.80M	\$4.80M

Savings = workforce × tier % retained × (\$40,000 wage × 16% replacement cost). Platform cost = \$240 × workforce. At the 5% platform-target tier, retention alone clears the platform cost at every scale shown — before the second and third calculations below.

Two further calculations compound the retention case. *License rationalization*: frontline populations carrying Microsoft F1/F3 or E3/E5 licenses (\$3 / \$10 / \$39 / \$60 per user per month at list, plus \$6 for Entra ID P1) largely to receive announcements represent \$1.5M+ per 10,000 workers in rationalizable spend once engagement moves to a purpose-built surface. *Breach-risk avoidance*: with a \$10.22M median cost per healthcare breach incident, retiring the shadow-IT channels — consumer messaging, group texts, photographed documents — that frontline teams improvise is not hygiene; it is measurable risk reduction.

### Deployment shape: Week 0 → Week 12

The six-phase implementation playbook runs identity reconciliation and HRIS sync first (RedeKey + AutoSync), engagement go-live in the first weeks — usage first, always — then integrations and agentic workflows on the adoption base. Legend’s 75%-in-7-days curve on page 9 is the front of that ramp.

## Where the document ends and the conversation starts.

This brief makes the strategic case in the general form. The version that matters is the one with *your numbers* in it.

The economic review is a working session, not a demo. Bring your portfolio's headcount, your turnover baseline, your license inventory, and your integration list; RedeApp's enterprise team brings the analytical framework from Section 06 and walks your finance organization through every line of the model with your inputs plugged in. The output is a fully-modeled commercial structure — platform fee plus consumption, multi-year options included — returned within one business day of the session.

The same methodology is self-service today: the Value Calculator at [redeapp.com/enterprise/proof/roi-calculator](https://redeapp.com/enterprise/proof/roi-calculator) runs the published constants against your employee count, industry, turnover, and license mix — industry presets are sourced from the named-customer baselines in Section 04.

### + THE COMPANION DOCUMENTS

#### Architecture Brief

The technical reference architecture for IT review boards — where RedeApp sits in your stack, the identity model, Authorization Forwarding, integration patterns.

[redeapp.com/enterprise/resources/architecture-brief](https://redeapp.com/enterprise/resources/architecture-brief)

#### Security One-Pager

The compressed summary your CISO's team scans before the deep dive — encryption, identity, audit trail, SOC 2 Type II posture.

[redeapp.com/enterprise/resources/security-one-pager](https://redeapp.com/enterprise/resources/security-one-pager)

#### Value Calculator

The published methodology, interactive — plug in your own numbers, see the four tiers against your workforce.

[redeapp.com/enterprise/proof/roi-calculator](https://redeapp.com/enterprise/proof/roi-calculator)

*Most enterprise evaluations start with this brief landing in front of a CEO or COO. Bring the harder questions it prompts — our leadership joins the follow-up directly.*

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# RedeApp — The Frontline Operating System

*The system of record for the people who do the work.*

[redeapp.com/enterprise](https://redeapp.com/enterprise)