Inside the Agentic Shift:

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Experts on CRM's AI Future
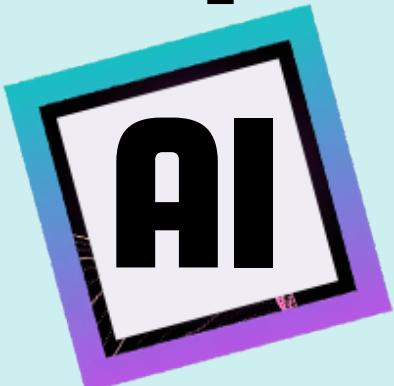
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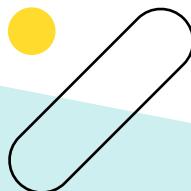
Introduction

What CRM leaders actually think about agentic CRM

AI agents are transforming CRM by evolving from simple automation to autonomous systems that plan, act, and adapt throughout complex customer journeys. This agentic shift disrupts traditional workflows and turns CRM from a reactive setup into a proactive engine driving real-time execution.

The shift requires both a technological overhaul and a cultural reset to support it. Reactions are mixed: some CRM users embrace the potential for hyper-personalization, greater efficiency, and smarter engagement, while others remain cautious about integration hurdles, data privacy, workforce readiness, and tangible results.

In "Inside the Agentic Shift," we feature exclusive insights from leading CRM experts, who discuss how agentic AI is poised to reshape lifecycle marketing. Join the conversation and discover how this agent-driven future is already unfolding, and what it means for connecting, converting, and retaining your customers.
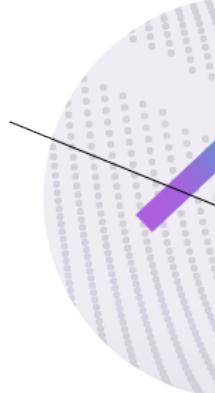
Sheeba
Thukral

*Solutions Architect,
CFOSquared Inc.*

Salesforce's AI agents are revolutionizing CRM by shifting from static, manual processes to dynamic, autonomous "do-it-for-me" platforms.

They achieve this through:

Intelligent Management:
Handling complex customer needs beyond human capacity.

Data-Driven Recommendations:
Providing tailored solutions using vast internal and real-time external data.

Real-time Decision Making:
By integrating with operational systems and identifying what actions to take, executing actions instantly.

Continuous Self-Learning:
Constantly refining responses and actions through feedback.

Salesforce's agents significantly enhance the end-user experience by:

Improving Customer Experience:
Delivering personalized and efficient service.

Simplifying Processes:
Reducing complexity for all users.

Minimizing Errors & Friction:
Automating tasks to boost accuracy.

Accelerating Resolution:
Providing faster responses and solutions.

Offering Proactive Support:
Anticipating needs and providing solutions before they are requested.

Crucially, human oversight remains vital for accuracy and complex scenarios, as these AI agents augment, rather than replace, human capabilities.

Future Impact

This transformation will lead to a significantly easier and improved customer experience by reducing manual friction and errors. Humans will be freed from mundane tasks to focus on higher-value, creative achievements. It's crucial to remember that human oversight remains integral for accuracy, ensuring that the human touch is not lost in the digital transformation. Adopting this agentic transformation is considered a strategic necessity for achieving long-term ROI, as organizations failing to adapt risk falling behind.

Karin
Holmgren

Sr. Manager, Growth Marketing, & Operations, KORE

AI agents are really useful when it comes to **volume-based pricing models**—like shipping, call center minutes, or contact limits in a database. They can monitor usage and send alerts when you're getting close to the top of your pricing tier. That way, you can either scale back, upgrade, or switch to a different service before you get hit with overage fees. It's a simple way to avoid surprise costs and stay on top of your spend.

AI agents are being used more and more to dig into customer data—like **purchase history, support ticket volume, or billing issues**—to spot early signs of churn or flag upsell opportunities. For example, if there's a spike in service tickets or billing errors or a decrease in volume after a price hike, that might signal a customer is at risk of leaving. Having accurate contract dates on file can trigger a retention or renewal journey; watching the results and determining to start that process 6 months in advance or 3 weeks in advance would be industry and product specific.

On the flip side, if your customer volume starts climbing, that could be a chance to upsell—though it's important to compare it against seasonal trends to avoid jumping to conclusions. Providing automated—but accurate—pricing discounts and new product information could help retain a customer who is shopping around for a lower price or a different function for their business.

AI Agents in Sales, Marketing & Service Automation

These agents also take care of repetitive tasks like **lead scoring, targeted outreach, and customer segmentation**, which gives sales and marketing teams more time to focus on actual creative work and actively selling. Taking away that administrative busy work is so freeing. Plus, manual work is a leading cause of workplace burnout.

That said, making all these insights work smoothly across different systems can still be a challenge, especially in complex B2B setups. A big challenge for many companies is that their **tech stack feels bloated and disconnected**, which makes it hard to get clean, usable insights across systems.

Sales is a great example—reps are often stuck updating the CRM instead of actually selling. AI agents can step in here by automating tasks like **taking meeting notes, logging activity, and even suggesting next steps** based on past interactions. That frees up sales teams to focus on what they do best: building relationships, driving negotiations, and closing complex deals. It's about giving them back valuable "brain time" instead of burying them in admin work.

A Real-World Example: Healthcare

Think of a simple example from a medical professional's point of view:

A new patient sets up a medical appointment online and completes intake paperwork online—that could otherwise be a phone call and a stack of printed papers, which someone then has to input into the computer system. Make it online and automate that process—**scheduling, confirmation, and reminders**—and automation can send confirmation, reminder emails and/or text messages.

Automation can reconcile that record across providers in the shared database, connecting the GP, chiropractor, and pharmacy to surface a complete medical profile. In the past, medical professionals were reliant on the patient's information (somewhat unreliable) or were stuck calling around to multiple offices, leaving messages, getting a call back, etc. It hurts to think about how slow and broken that process was.

Enhancing Personalization & Customer Experience

AI agents definitely help create a more **personalized and timely customer experience.** They can flag at-risk accounts or key usage trends and surface them to customer success teams or sales reps so they can step in at the right moment.

If a customer stops responding to sales calls or emails, it could be a sign they've left the company or their role has changed. Instead of letting the opportunity go cold, automation can step in to help. AI tools can trigger checks across sources like **LinkedIn or company websites** to confirm if the contact has moved on, then suggest or even find new potential contacts within the same organization. This keeps the relationship warm and helps sales teams stay focused.

On the marketing side, they enable highly **targeted retention campaigns** that speak directly to a customer's needs—like showing how a product saves their team time or reduces costs for the business. It's not just faster communication—it's smarter, more relevant outreach that solves problems before they escalate.

AI in E-commerce Marketing

AI in e-commerce marketing can also target the **window shopper** who shows high interest—clicking ads, browsing often, filling carts, comparing options, then switching to another site—but rarely converts.

AI can recognize these behavioral patterns and flag them for personalized engagement strategies. It may test different incentives like time-sensitive offers or signals based on what's worked for similar customers. If one channel isn't performing, AI can pivot—for example, swapping emails for **push notifications** or **retargeting ads**.

If the likelihood of purchase is low, AI may shift to **lower-cost brand-building tactics** to nurture trust over time without being too aggressive—or stop marketing efforts altogether if they never or rarely convert to sales.

24/7 Digital Agents & Accessibility

Using an online agent can really enhance the customer experience by providing **24/7 availability**, giving customers the flexibility to ask questions on their own time.

It's also a more **accessible option**—people with disabilities may find it easier to use digital tools than to speak, complete forms by hand, or read documents and instructions.

For those who speak **English as a second language**, having the ability to **translate responses into their native language** can make a huge difference in clarity and comfort.

The Future: Proactive Agentic AI

Agentic AI has the potential to move from **reactive to proactive**—but it starts with getting the **data foundation right**. Right now, data is often goopy and disconnected across systems, so investing in cleaning, standardizing, and aligning that data is critical for AI to make accurate predictions or take meaningful action without human input.

As AI begins to pull in signals from different sources, it'll build a **more holistic customer view** and start anticipating needs—like flagging potential churn or surfacing upsell opportunities—**before** a human even has to step in.

That said, there's real risk if AI is allowed to act without the right **guardrails**. AI hallucinations and misinformation can erase trust instantly—especially in sensitive areas like **healthcare or finance**, where giving inaccurate advice without a person validating the individual context could be downright dangerous.

Building in compliance, fact-checking, and clear boundaries for what AI should and shouldn't do will be critical for earning and keeping customer and business trust.
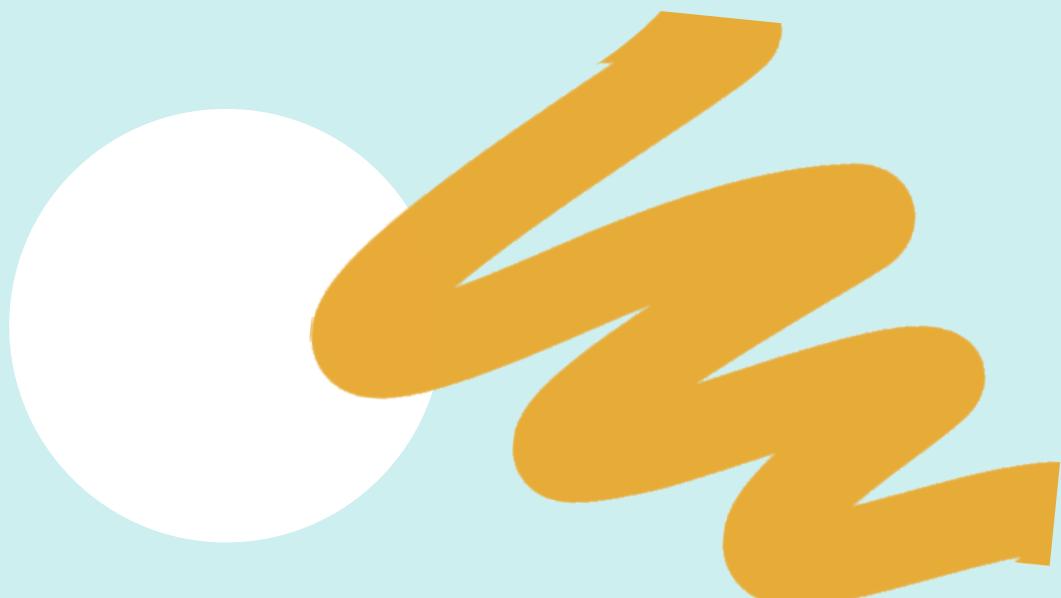
Adriane Grunenberg

HubSpot Automation & Digital Analytics Expert, Pinetco

What really stands out to me is how these agents handle cross-object logic - an area that's historically been a bit clunky in HubSpot. Instead of relying on rigid workflows or patchy manual updates, Breeze agents can interpret a deal's momentum, trigger timely follow-ups, notify the right people, or even reprioritize leads based on subtle behavioral cues.

They're especially useful in keeping marketing, sales, and service aligned, helping to ensure that context doesn't fall through the cracks between teams or lifecycle stages.

In a way, these agents behave like project managers who see the broader picture and gently nudge people (or systems) back on track when something slips. That's where I think their real strength lies: stitching disparate pieces together more intuitively.

The Current Limitations: Context and Trust

That said, I do have a few reservations. From what I've seen so far, contextual precision isn't always reliable. Breeze agents can sometimes act too early or too vaguely, particularly in less structured environments where CRM data is incomplete or messy (which, let's be honest, is often the case).

And while they may seem intelligent, I think there's a real risk of users over-trusting them, especially when the reasoning behind their actions isn't visible. Personally, I'd love more transparency here, just a simple way to peek "under the hood" would already build more trust and control.

A Modular Future: From Users to Co-Creators

Looking ahead, I imagine a future where HubSpot introduces a customizable, modular agent ecosystem. I'd love the ability to spin up lightweight, task-specific agents: say, one trained to revive stalled leads or spot churn signals early. Ideally, this wouldn't be limited to a black box experience, but would give users real influence over the agent's prompts, data signals, and logic. Right now, it still feels like we're being "handed" intelligence, rather than "collaborating" with it.

I think HubSpot has the UX mindset to make this work. They've always been good at making complex tools accessible to non-technical users. But for AI agents to truly flourish, I believe users need more than just automation: they need agency. The ability to shape, refine, and evolve how these agents think and act over time.

So, all in all I'm cautiously optimistic. Breeze is a promising first step but we're not in "AI dreamland" just yet. It feels more like we're still onboarding into something much bigger.
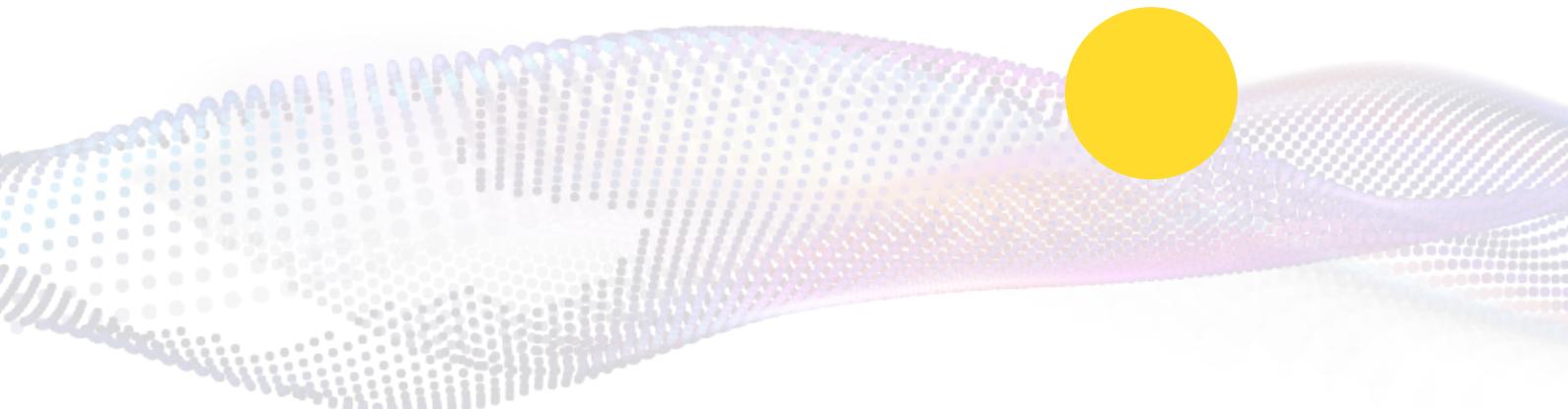
Thomas Krypas

*HubSpot Trainer,
Consultant & Growth
Strategist, White Hat*
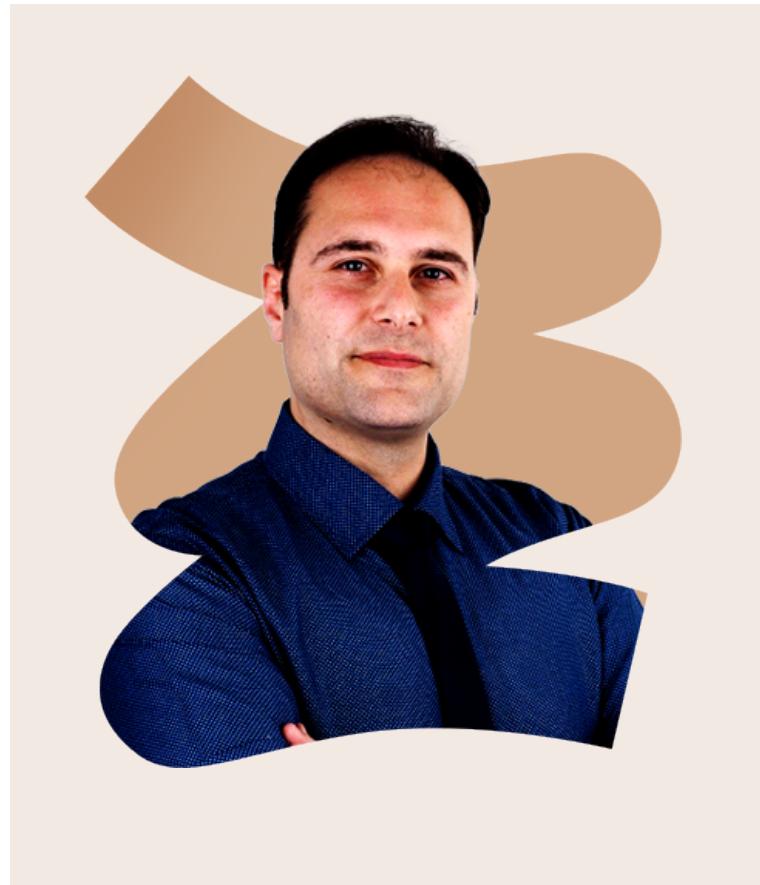
Through my work with HubSpot and beyond, I've seen firsthand how AI agents are transforming the way we approach customer data. We're no longer just collecting data — we're activating it. Whether it's purchase history, support logs, or website interactions, AI is now helping us detect patterns, anticipate churn, and recommend upsell paths that were previously hidden behind layers of manual analysis. These agents are getting smarter at surfacing "silent signals" — for instance, a drop in engagement combined with longer response times can now trigger an internal retention workflow, before the risk becomes obvious.

HubSpot's native AI features (like predictive lead scoring or content recommendations) are a great starting point, but where I've seen the biggest lift is when we connect external data streams — social signals, usage data, or NPS results — into the CRM to fuel next-best-action models. That's where agentic behavior starts to emerge: the system not only knows what's likely to happen but can recommend or initiate a relevant step.

In daily practice, AI agents now handle a surprising number of repetitive tasks: logging activity, summarizing calls, personalizing email content by persona and stage, even proposing deal close dates based on historical cycles. That's a game-changer for marketing and sales teams who want to move faster with more relevance.

Still, there are limits — particularly around inter-system coordination and context awareness. Agents can struggle to understand nuances across disconnected tools (say, between a sales pipeline and a support issue). As we move forward, more unified data layers and continuous learning loops will unlock the next level of customer intelligence.

I'm especially excited about where this is going: AI not just reacting, but proactively identifying opportunities or risks before the customer even articulates them — and eventually combining internal CRM data with external signals like IoT, partner tools, and digital behavior to create a truly 360°, intelligent customer experience.

Allan Heo

*Founder & CEO,
For Now Marketing*

Historical Context: AI in Braze

Braze was ahead of the curve in adopting AI, introducing features like Intelligent Selection for optimizing variants, Intelligent Timing for delivering messages at the right moment, and Intelligent Channel for choosing the most engaging touchpoint. An early AI-focused product manager helped embed these capabilities deeply into the platform. However, despite this early start, Braze has lagged behind in the 2023–2025 AI wave. Its current offerings — churn prediction, item recommendations, and generative AI for content and queries — remain supportive tools rather than autonomous systems.

Current Limitations

As of mid-2025, Braze does not yet offer true agentic AI. Execution still depends on marketers, with existing tools providing assistance rather than independence. While Project Catalyst and the OfferFit acquisition signal a shift toward more intelligent automation, neither has been released into the product.

The Promise of Agentic AI

If fully realized, agentic AI in Braze could transform campaign orchestration. Agents would personalize content, optimize timing, and select channels in real time by analyzing user behavior and demographics. They could also accelerate

experimentation, trigger follow-ups automatically, and optimize multichannel journeys at the individual level — removing the need for manual segmentation.

Future Vision: Reactive to Proactive

Today, marketers launch campaigns, wait for results, and then make adjustments. In contrast, agentic AI would anticipate drop-offs, adapt communication strategies instantly, and personalize interactions before human intervention is needed.

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Leveraging External Data

The effectiveness of these agents will depend heavily on data integrations. Tools like Segment and Hightouch are already enabling real-time, multidimensional data syncing, with Hightouch in particular gaining traction among Braze customers. Reflecting this shift, Braze is moving away from charging by data points and toward a usage-based pricing model, which incentivizes customers to feed richer data into the system.

Reality Check

For now, Catalyst and OfferFit remain unreleased, and no Braze-native AI agent is operational. Some partners, such as Stitch, are experimenting with external AI agents, but the expectation is that Braze's eventual agent will surpass these third-party solutions once live.

Predictions

Looking ahead, marketers will still define strategy, but AI will take on much of the execution — from launching and managing campaigns to creating content and analyzing user behavior in real time. CRM operations may increasingly run in "autopilot" mode, with human oversight limited to governance and integration management. Personally, I'm preparing to test, learn, and implement these capabilities the moment Project Catalyst becomes available.

Malek Laalai

Senior CRM Manager, Instapro Group

I've been working with Braze for the past four years, and when I first started, AI wasn't even part of the conversation. Back then, everything—from segmentation to send-time optimization—was manual. It was powerful, but also time-consuming. You had to know exactly what you wanted to test, set it up yourself, and wait for enough results before making adjustments.

Over the years, I've watched Braze evolve, and the introduction of AI agents has been one of the biggest shifts. Suddenly, the platform isn't just executing what you tell it to do—it's starting to make decisions with you, in real time.

The impact is hard to ignore. AI can now automate tasks that used to take hours: building micro-segments, finding the best time to send, running and analyzing A/B tests, even adjusting journeys mid-flight based on customer behavior. That means more time for strategy, creative thinking, and aligning with other teams. It's also made personalization deeper—AI picks up on patterns I might have missed, especially in large datasets.

But I've also learned that AI in Braze isn't a magic button. It's only as good as the data it's working with. If the inputs are incomplete, messy, or misleading, AI can confidently push campaigns in the wrong direction—and do it at scale. I've seen cases where automation improved short-term metrics but didn't align with brand tone or long-term goals.

That's why, even with AI, I believe in keeping humans in the loop. For me, AI works best as a co-pilot: I set the guardrails, define the objectives, and keep an eye on its decisions while it handles the heavy lifting in the background.

Looking ahead, I think Braze will continue moving toward that co-pilot model. Marketers will focus more on setting vision and strategy, while AI continuously optimizes within those boundaries. Self-adjusting lifecycle programs are already possible, and I can see them becoming the norm—reacting instantly to customer behavior and reducing the gap between action and response to almost nothing.

That said, I don't think AI will ever replace the human side of CRM. It can optimize for clicks, opens, and conversions, but it can't fully understand brand voice, emotional resonance, or the context behind a customer's decision. The best results I've had with Braze came from combining AI's speed and precision with human creativity, empathy, and critical thinking.

That balance is where the real magic happens.

Joseph Senart

Sr. Technical CRM Manager at Papa John's

The AI Hype Cycle in Marketing

Artificial Intelligence is becoming a core part of the marketing technology stack for companies with the budget to invest. It is often presented as an evergreen, transformative technology. While the term "AI" is applied to a lot of long-standing techniques—predictive modeling, machine learning, proprietary algorithms, real-time insights, and analytics-driven optimization—the current wave does bring improvements in processing speed, automation, and the sheer volume of data that can be analyzed in real time.

The growing accessibility of AI-powered features is enabling even small teams to experiment with capabilities that once required significant technical resources. At the same time, the rebranding may make the technology sound more sophisticated, but in many cases, the underlying capabilities remain similar to earlier tools—just with more complex deployment requirements.

Braze's Entry into the AI Space

Braze has joined this wave with its own BrazeAI suite and its acquisition of OfferFit. These tools share similarities with Braze's recently announced Project Catalyst, though they operate on separate platforms. While this can add sophistication, it may also introduce additional complexity for end users.

That said, BrazeAI and OfferFit also open new opportunities for marketers to automate decision-making, test creative ideas at scale, and adapt campaigns faster than before. For teams that can navigate the learning curve, these tools have the potential to reduce repetitive work and free up time for higher-level strategy.

The Familiar Promises of AI Tools

Like previous technological advancements in marketing, AI platforms tend to promise:

- Greater personalization capabilities
- Optimization of customer journeys and experiences
- Evolving definitions of "1:1 marketing"
- Scalability, adaptability, and smarter content delivery

These benefits sound compelling, but often overlook the operational realities and downstream demands that marketers face when implementing such tools.

The Gap Between Potential and Execution

BrazeAI attempts to address some of these challenges through generative content. However, at the scale Braze operates, the technology may not yet fully meet the speed, accuracy, and adaptability required for high-stakes campaigns. AI-generated output still often requires extensive review and adjustments, which can lengthen timelines rather than shorten them.

Yes, early adopters who have built workflows around these tools have reported gains in testing velocity and content variation that would have been impractical manually.

However, with Catalyst and OfferFit, the lack of seamless integration could become a barrier. Without smooth deployment into existing workflows, these solutions risk being set aside despite their potential value.

What AI in Marketing Really Needs

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Empowering the People Who Use the Tools

Marketers on the front lines often know exactly how technology could improve their efficiency and results. The most effective tools will respect that expertise, providing flexibility rather than imposing rigid new systems.

For BrazeAI to succeed long term, it will need to win over the developers and power users who already understand the platform's strengths. By integrating with and empowering existing marketing efforts—rather than competing with them—AI can fulfill its promise as a practical, lasting enhancement to the marketing toolkit. Done right, it can shift time and energy away from repetitive execution toward more creative, strategic, and high-impact work.

Kinga Dow

AI Email Marketing Expert, Klaviyo Specialist
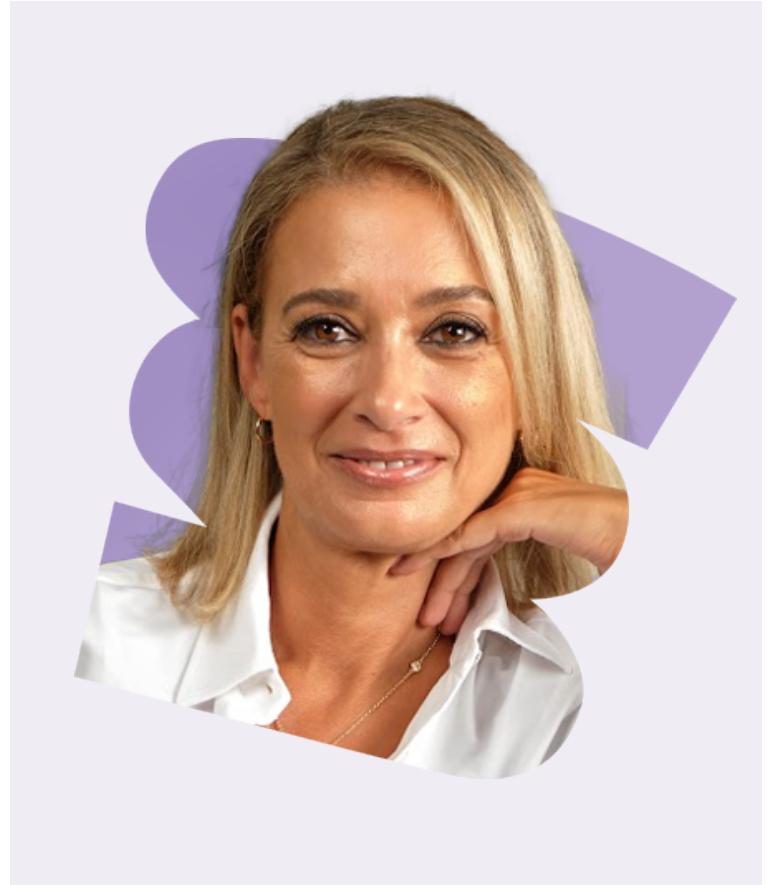
Current Use of AI in Klaviyo's CRM Functionalities

Klaviyo's recent analytics advancements, announced in January 2025, represent a paradigm shift from reactive reporting to predictive intelligence. The platform now leverages AI in three transformative ways:

RFM Analysis & Action Center automatically categorizes customers based on recency, frequency, and monetary behavior, then generates instant, actionable recommendations. This eliminates the guesswork that has plagued retention strategies for years.

Predictive Profile Properties create forward-looking customer insights, including "Best cross-sell date" and "Next best product" recommendations based on purchasing patterns. This shifts email marketing from broadcast messaging to anticipatory customer service.

AI-Powered Campaign Personalization determines the winning version of emails or SMS for each individual subscriber based on their likelihood to engage. We're moving beyond A/B testing entire segments to true 1:1 optimization.

The newly released MCP Server integration with Claude represents a breakthrough in AI-native marketing analysis. Through direct API connectivity, marketers can now have conversational interactions with their Klaviyo data, asking complex questions in natural language and receiving instant, contextual insights that previously required hours of manual analysis.

Benefits These AI Features Bring to End-Users

From my work implementing Advanced Analytics for health, beauty, and fashion brands, the impact is immediate and measurable:

Revenue Per Recipient improves significantly when brands move from generic campaigns to AI-driven personalization. The difference between targeted, behavior-based flows and traditional broadcast emails is substantial across all client implementations.

Customer Lifetime Value Attribution becomes transparent. Brands can finally see how email marketing contributes to long-term customer value, not just immediate sales. This shifts budget allocation from acquisition-heavy to retention-focused strategies.

Operational Efficiency improves dramatically. Instead of marketers spending hours analyzing spreadsheets to determine customer segments, AI delivers instant insights with recommended actions. This frees teams to focus on creative strategy rather than data manipulation.

Vision for Future AI Integration in Klaviyo's CRM Landscape

The most exciting development is Klaviyo's new **Model Context Protocol (MCP) Server integration,** which connects directly with Claude and development environments like Cursor. This represents the first true AI-native CRM interface, enabling real-time conversational analysis of customer data.

AI-Powered Data Analysis through the MCP connector allows marketers to ask complex questions in natural language: "Show me the performance of my email campaigns from the last 30 days" or "Which flows are performing the best in terms of conversions?" The AI instantly processes campaign data and provides actionable insights through conversational responses.

Future possibilities include Autonomous Campaign Development where AI could directly access campaign performance data, customer behaviors, and inventory data synced to Klaviyo. Instead of manually building segments, marketers would describe desired outcomes and let AI construct optimal targeting strategies.

Enhanced Churn Prevention will evolve beyond current AI capabilities to automatically deploy intervention campaigns. The MCP integration creates the foundation for AI to analyze engagement patterns, predict customer lifecycle stages, and eventually trigger personalized retention sequences.

Cross-Channel Orchestration powered by conversational AI represents the future of unified email, SMS, and emerging channels into cohesive customer journeys that could adapt in real-time based on engagement patterns.

The ultimate vision is **Agentic Marketing:** AI that doesn't just provide insights but takes autonomous action through direct CRM integration. The MCP connector transforms Klaviyo from a marketing platform into an intelligent marketing partner, laying the groundwork for systems that could operate with minimal human oversight while maximizing customer satisfaction and business outcomes.

This integration positions Klaviyo as the first CRM to offer AI-native marketing analysis, where the boundary between human strategy and AI-powered insights becomes seamlessly integrated.

Britney Young

Senior Technical Product Manager, Amazon Web Services

Within Adobe Marketo Engage, AI has already moved from theory to practice, giving marketers the tools to automate repetitive tasks, sharpen targeting, and deliver more relevant content across the entire lifecycle. Looking ahead, the next chapter will be defined by agentic AI—intelligent systems that act on behalf of marketers to drive both efficiency and precision at scale.

The Current Role of AI in Marketo's CRM Functionalities

Today, AI in Marketo shows up most clearly in three areas: predictive content, predictive audiences, and automated system notifications. Predictive content, powered by Adobe Sensei, automatically tags and recommends the best-fit assets for each prospect, ensuring the right message reaches the right person at the right time. Predictive audiences simplify account-based marketing by surfacing accounts most likely to buy or expand, allowing teams to focus on high-return opportunities. Automated notifications add another layer of intelligence, alerting marketers to potential deliverability or performance issues before they become bigger problems. Together, these features prove that AI in Marketo capabilities is already a practical part of daily marketing operations.

How These AI Capabilities Enhance User Experiences

For marketers, these tools reduce friction and free up time for higher-value work. Predictive content removes the manual effort of auditing libraries and building endless segments. Predictive audiences accelerate campaign planning and provide data-backed targeting lists that align with sales. Automated notifications minimize the burden of constant monitoring, giving teams confidence that programs are running smoothly. The result is a better experience for marketers: less time on operational tasks, more time driving strategy and creativity.

The Foresight: Agentic AI in Marketo's Ecosystem

The future lies in agentic AI—AI that doesn't just guide decisions but takes proactive action. In Marketo, this could mean automatically cleaning and enriching data, normalizing job titles into standardized roles, or ensuring imports meet governance standards. It could orchestrate how individuals flow across multiple campaigns, scheduling emails at the moment each recipient is most likely to engage. Governance could also be strengthened, with agentic AI enforcing program naming conventions, flagging spam-prone content, and proactively identifying suspicious activity such as bot attacks. Finally, sales alignment could improve through refined lead qualification models that help prioritize the right opportunities.

In this vision, AI evolves from assistant to co-pilot—managing operational rigor, protecting data integrity, and enabling marketers to focus on delivering more meaningful, personalized experiences. The future of lifecycle marketing in CRMs isn't just intelligent. It's agentic.

Conclusion

The rise of AI agents marks a new chapter in CRM—one where intelligent automation meets real-time adaptability to create truly personalized customer journeys. As these technologies evolve, staying informed and embracing agentic innovation will be key to unlocking the full potential of your marketing strategy. The protagonist is an agent—make sure you're the one directing the story.

Mavlers

Get in touch

Write to contact@mavlers.com

US : +1(817) 631-5135 | UK : +44 020 4578 6207 | AUS : +61 0483 901 841

or visit www.mavlers.com for more information