Informatica from Salesforce | CLOUD PERSPECTIVE

eBook

Preparing your CRM for Agentic AI

Prioritizing the data foundations

Where data & AI come to LIFE

Contents

Introduction

CRM systems have come a long way. Built originally as platforms for recording customer activity, they have evolved into applications that help organizations understand and manage customer relationships across sales, marketing, service and beyond.

Now, CRM is entering a phase where AI agents can define, deliver and improve customer process outcomes to enable closer, more personal relationships at scale. Data is at the center of this paradigm shift.

But the way CRM data is currently treated means many organizations aren't ready for this opportunity. Too often, CRM systems sit outside the enterprise data strategy, so data management is considered late in the process rather than built in from the start.

To make agentic CRM possible, we need to make data management a higher priority.

Enterprise architects, data leaders and CRM application owners sit at the heart of this shift. The decisions you make about data quality, governance and enterprise MDM determine whether CRM data limits agentic AI or creates the conditions for success.

This eBook shares the strategic insights and practical examples to rethink how your data is managed and create the foundations for agentic AI success.

Customer relationships in the agentic AI era: Defined by data

Agentic AI may be at the top of the hype cycle , but it is already changing what we expect from CRM. Previous CRM evolutions changed the emphasis from how teams use CRM software to what the systems understand about each customer. Agentic AI takes this progression further by using that understanding to support decisions throughout the customer lifecycle.

Instead of siloed data within the CRM system, agentic CRM will deliver connected customer intelligence that reflects contextual data and related data held in other enterprise systems. Well-trained, trustworthy AI agents will support customer processes by autonomously interpreting requests, recognizing what needs attention and taking action — with humans remaining in the loop to guide decisions, provide oversight, and apply judgment in customer interactions.

In this agentic AI era, data and how you manage it is fundamental to building close, valuable and trusted customer relationships.

Agentic AI **creates a new way of working with CRM applications**. Agents reduce the manual steps users take, bring the right insight into view at the right moment and carry out actions that previously depended on people navigating multiple systems.

To support this approach, data needs to be understood holistically across the enterprise rather than staying within a single application. Enterprise metadata intelligence is also required to ensure a common understanding of data across different applications.

What is agentic AI?

Agentic AI refers to AI systems designed to take action on behalf of users, rather than simply generating insights or recommendations. These systems interpret customer signals and requests, determine next steps across cases, interactions, and processes, and execute actions within defined rules, governance, and human oversight.

CRM's evolution

From sales-led, often inconsistent data entry to an intelligence hub for customer relationships.

From siloed ownership to stewardship shared across the organization.

From a front-office tool to a core enterprise platform.

[1] https://www.gartner.com/en/articles/hype-cycle-for-artificial-intelligence

Customer relationships in the agentic AI era: Defined by data (continued)

Agents draw information from sales activity, service interactions, fulfilment, billing, product usage and other business systems to form an accurate, contextual and trustworthy view of what is happening around each customer.

Service teams are already seeing the impact. Agents can recognize the nature of a customer issue, open the appropriate case type and supply meaningful context before an advisor becomes involved. The advisor's first view is no longer a blank case: it is a situation already interpreted and classified with suggested next steps.

Agents also introduce **new opportunities to build efficient, connected and personalized relationships at scale**. For example, an agent can recognize when a long-running service enquiry is rooted in a recent fulfilment delay and guide the next step with that context in mind. Instead of treating the request in isolation, the agent draws on data across the organization for a joined-up response.

Additionally, agents can **reveal insights that sit outside CRM's traditional boundaries**. By working across both front- and back-office systems, agents identify patterns — for example, where product usage signals an emerging need, or where a change in billing explains a shift in customer behavior. These connections were previously hidden in separate systems but become visible and actionable when agents have access to wider enterprise data. But when data is managed in each system separately, with every update it will get more out of synch. It will become impossible to understand that two customers in different systems are actually the same, which bills or service requests are related to this customer, and the quality of the data will decrease if no standards and checks have been defined. Without this understanding there is no context and the agentic enterprise will break.

The fundamental pillars of good data management

For AI agents to operate reliably, they need consistent, contextual and trusted data. Their decisions depend on how information is defined, maintained and connected — not just within CRM, but wherever data is created or updated.

An effective data environment relies on four fundamentals:

- **Quality:** Information is accurate, up to date and complete across business domains.
- **Consistency:** A consolidated view of master data across the enterprise ensures data is consistent in any application, agent or system in your organization.
- **Governance:** A metadata system of record, data access, and privacy controls and lineage ensure data is understood and trustworthy across your organization.
- **Accessibility:** Agents can access the right data at the moment it is needed, without barriers between systems.

When these conditions are in place — independent of any single application — agents strengthen decisions and streamline processes throughout the customer lifecycle.

The data management barrier holding back CRM

Despite the strategic role of CRM systems, CRM data is often still a transformation afterthought. Change leaders tend to focus on business processes — only later recognizing that the underlying information isn't ready to support whatever they are trying to build.

The cost of not paying attention to data management in this way can be substantial. When one company implemented a new CRM system, it took a year to realize that the reason it wasn't delivering the intended benefits wasn't a CRM problem. It was a data problem.

The new processes were well-designed, but the data feeding them was inconsistent and incomplete. As a result, the change program stalled. Not because the technology was wrong, but because the data foundations weren't ready. It's a reminder that even the best-intentioned change falls short when data management is treated as an inferior task.

CRM must be visible in your enterprise data strategy

CRM is not always given a place within enterprise data strategies, and this is largely due to ownership of the system. Historically, CRM platform uptake has been driven by sales and marketing teams without involvement of enterprise IT. As a result, implementations focused on usability and speed rather than data consistency, governance or quality.

In many companies, no formal processes or data standards sit behind CRM systems, despite CRM being critical to how organizations sell to and serve customers. Over the past five years, the consequences of this divide have become more visible:

- Cyber incidents exposing weaknesses in data trust.
- Operational disruption caused by duplicated or conflicting data.
- Compliance failures in regulated sectors where data controls are not applied consistently.

These issues point to the same underlying problem: CRM has not been treated as part of the enterprise data estate, even as it has become foundational to how service-led organizations operate.

System mergers highlight data challenges

The impact of data siloes is most evident when organizations need to bring customer data together at scale, such as during mergers and acquisitions or when consolidating multiple departmental CRMs. Two CRM systems may seem to capture the same data sets, but behind the scenes, definitions differ, ownership is unclear and structures rarely align.

Instead of merging cleanly, information has to be re-engineered before it can be used, resulting in slower consolidation, duplicated work, and inconsistent reporting.

The data management barrier holding back CRM (continued)

When data quality falls short, the issue isn't a flawed insight; it's a flawed action.

Today, when an AI model produces something unexpected, people check the data afterwards to understand why. Agents reverse that sequence. They act without waiting for review, which means the quality and context of the data they rely on must be right before they act. Without accurate, contextual and trusted data, agents cannot deliver sustained efficiency gains or cost reductions. Errors appear downstream, increasing rework and operational risk.

The risk becomes greater in settings where outcomes carry weight. In a hospital environment, for example, staff may rely on AI-generated suggestions with more confidence than the underlying clinical data deserves.

CRM may operate in a different context, but the principle is the same. Agents will act decisively even when the information behind them is compromised.

Preparing for agentic CRM means retiring the idea that 'good enough' is acceptable.

Data leaders, architects and application owners need to collaborate to define the standards for data that agents will depend on — from quality thresholds and master data attributes to privacy expectations, a shared vocabulary and governance rules — so decisions are made on comprehensive, contextual and trustworthy information.

As agents take on more responsibility, organizations must be able to explain why a decision was made or a specific action was taken. That traceability depends on lineage and an intelligent metadata system of record that allows an organization to link outcomes back to the underlying information.

The myth of 'good enough' data

The idea of 'good enough' data has lingered for years; the belief that teams can work around gaps, or that technology will smooth them out. In an agentic environment, that mindset starts to create real risk.

A new strategic paradigm for data management and CRM

Agentic CRM raises the expectations placed on enterprise information. It calls for a shift in how your organization manages data: separating data management from applications to support data management as an independent enterprise-wide function. This drives consistency, strengthens governance and ensures visibility and compliance as information moves across systems.

This shift begins with rethinking where data is managed and how it should be defined.

Why application-bound data management slows you down

When data management takes place inside specific systems, organizations end up maintaining several versions of the same information. That creates duplication and inconsistency, and costs rise with every new platform.

Most customer journeys span sales, service, fulfilment and finance, and every hand-off creates potential for misalignment and operational disruption. Organizations typically respond in two ways:

- **Manual re-entry** to keep systems aligned.
- **Integrating everything with everything else** to force systems to match.

Both approaches become fragile and costly over time. A decoupled data management approach avoids these issues by creating:

- **A shared understanding** of data across systems.
- **Stronger quality management**, governance and traceability.
- **Lower maintenance costs** by reducing duplication.
- **A more dependable foundation** for agentic CRM.

Human error compounds application-bound data problems

By design, operational applications are not built for data management. They do not include robust mechanisms for data quality enforcement, de-duplication, or ongoing stewardship. As a result, routine user behavior becomes a source of data quality issues. Users working quickly often accept default values or bypass checks to move through screens faster, which can introduce inaccurate or incomplete information.

Duplicate records arise in similar ways. Users may create new records without confirming whether one already exists or they may introduce small variations in names that fragment what should be a single account or customer view. Over time, the compounding effect of these patterns reduces the reliability of application-bound data even further.

A new strategic paradigm for data management and CRM (continued)

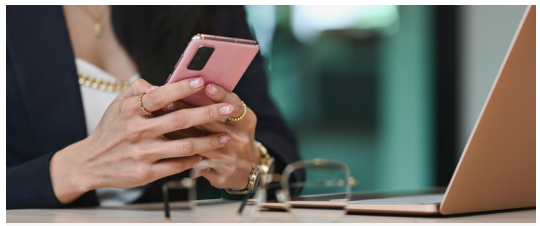
Decoupling master data management from CRM applications

Even in this early stage of agentic AI, siloed data management is under strain. Agents don't work from copies; they work from connections, which means they need shared definitions and a connected view of data across the enterprise to operate effectively and provide reliable outcomes.

If multiple agents contribute to an outcome, they must interpret metadata definitions consistently: what counts as a customer, what defines a bank account, what qualifies as an active relationship and similar considerations.

Some definitions will be unique to your organization, others shaped by industry practice. What matters is that they remain stable wherever they are used.

These scenarios demonstrate how quickly master data fragmentation and a lack of a metadata system of record become a barrier:



Scenario 1:

A customer contacts their telecoms provider because their cellphone has stopped working and they need a replacement.

The service request opens in the support platform. To progress it, the advisor needs fulfilment data from the logistics system to check stock and dispatch times, and billing information from finance to confirm the customer's eligibility for an upgrade. Without connected data, teams either re-enter information across systems or rely on brittle integrations to keep the process moving.

Scenario 2:

A customer calls their car insurance company because they've bought a new vehicle.

The policy sits in one system and the customer record in another, yet an agent reviewing the change needs both to appear as one coherent view. That level of consistency is only possible when master data is managed centrally and a shared vocabulary is being used.

By separating the management of master data and metadata from the applications that use it, CRM becomes a consumer of trusted information rather than the system responsible for maintaining it — allowing both humans and agents to operate as intended.

A new strategic paradigm for data management and CRM (continued)

Data governance for compliance and cross-system visibility

As customer information moves through a wider set of enterprise systems, data governance is the mechanism that keeps those movements consistent and accountable.

Maintaining that accountability rests on two core pillars that determine how customer records are aligned across your business:

- **Metadata system of record.**
  Finance, marketing and sales may each handle different parts of the same relationship. Unless they share a common definition for a connected view, your organization cannot rely on comprehensive and contextual data to support credible outcomes, accurate reporting or compliant decisions.
- **Lineage is non-negotiable.**
  Knowing where data comes from, who changed it and whether they had the authority to do so is a core requirement for operational integrity. Without lineage, teams cannot validate the information behind critical decisions or deliver credible outcomes.

Mistakes carry serious consequences

When data governance fails, organizations feel the impact deeply. Regulatory exposure increases, data privacy issues occur and compliance becomes harder to demonstrate, leading to customers losing confidence in the security and quality of service you can deliver.

A recent case illustrates how far these effects can reach. In October 2025, the Dutch Data Protection Authority imposed a €2.7 million fine on a global information service provider for breaching the General Data Protection Regulation (GDPR)[2]. The financial impact of this penalty was considerable, but the loss of trust among current and potential customers was just as severe.

Centralizing metadata and master data management minimizes regulatory risks. Managing core records and definitions in one place enables every team to work from the same verified source, supported by full visibility into how information moves throughout the organization.

Rigorous governance is essential for launching agentic CRM

Autonomous agent decisions depend on records that are traceable, defensible and trustworthy, so data governance matters. Consider mortgage approvals. Agents can assemble and evaluate information at speed, but unless every contributing record is quality controlled and verified, that speed cannot be trusted. Governance ensures agents act on information that stands up to scrutiny.

[2] Source: Federation of Business Information Services

Practical insights and success stories

Embracing an agentic approach doesn't happen through technology alone. It depends on the judgement of the people who shape how data is defined, governed and used across the organization.

With the right implementation choices — and with insight from organizations that have already strengthened their data foundations — you can guide your business toward a more resilient and future-ready approach to CRM data management.

Business value beyond agentic AI

Prioritizing your data will deliver business value long before your agentic capability reaches full maturity. A coherent data foundation improves your customer experience, strengthens operational efficiency and reduces the effort required to meet compliance and reporting expectations. It also increases user confidence in the systems your teams rely on each day.

But prioritizing data management also builds a robust foundation for your organization for the agentic future we know is coming:

- Decisions made on dependable information.
- Processes that operate smoothly across applications.
- Outcomes that reflect a complete view of every customer.

Practical insights and success stories (continued)

These advantages are already being experienced by organizations that have strengthened their CRM data foundations.
Here are two examples of how real-world companies approached the challenge — and what they achieved:

Global travel group strengthens CRM data foundations to unify customer experience[3]

A global leisure and travel group serving millions of customers across multiple brands found its CRM environment no longer reflected the true complexity of its customer relationships.

The organization was operating with fragmented data. Decades of acquisitions and incremental system changes had led to:

- Customer records duplicated across multiple applications.
- Inconsistent data definitions between brands.
- Limited visibility into traveler interactions across channels.
- Manual workarounds to align booking, service and loyalty data.
- Frequent data-quality issues impacting reporting and customer engagement.

The travel group implemented a coordinated program to build a unified data foundation across its brands and channels. Key elements included:

- **Consolidating customer and booking data** into a governed, enterprise-wide model.
- **Introducing shared definitions** for travelers, households, enquiries and bookings.
- **Establishing stewardship processes** to protect quality across regions.
- **Implementing rules-based validation** to reduce duplication and inconsistent records.
- **Creating standardized data pipelines** to support marketing, service and analytics teams.

This foundation enabled the organization to achieve a single, accurate view of travelers across brands, for more consistent service interactions across booking, travel and support.
They now also have a scalable data environment to support agentic CRM processes in future.

[3] Source: Cloud Perspective 2025

Practical insights and success stories (continued)

Global intelligent automation provider unifies its CRM data foundation across multiple acquisitions to support a highly personalized sales strategy[4]

Following multiple strategic acquisitions, this global intelligent automation leader needed to ensure its CRM foundation delivered the customer data and governance required for a growth strategy built around the precise, insight-driven targeting of account-based selling (ABS). The impact of customer and account records spread across multiple systems and businesses included:

- Duplicate and inconsistently enriched records making it difficult to access a single, accurate view of global accounts.
- Limited visibility into cross-portfolio product adoption impacting cross- and up-sell opportunities.
- Manual reconciliations and spreadsheets to piece together customer insight across the business.
- Slower reporting, reduced confidence in analytics and constrained readiness for future acquisitions.

To address these challenges, the company launched a coordinated program to build an integrated AI-ready CRM data foundation.

- **Consolidating 1.5 million customer records** across the company and acquired businesses to provide a single source of truth on customer data.
- **Embedding governance policies** to enforce segmentation, scoring, deduplication and compliance for high data quality and high-value account prioritization.
- **Automating workflows** for account enrichment and white space identification to reduce manual data handling.
- **Enabling real-time dashboards** to track account engagement, pipeline growth, and sales-marketing alignment.

With this unified data framework in place, sales and marketing have the customer data visibility they need to deliver on the company's ABS-based growth strategy. The company is now equipped with a scalable, trusted data environment ready to seamlessly integrate future acquisitions and to take full advantage of AI and agentic CRM opportunities.

[4] Source: Cloud Perspective 2025

Practical insights and success stories (continued)

Critical considerations for implementation success

The way your organization manages data will determine the results you see from agentic CRM. To help you build the data foundations needed for effective AI, here are some key steps to consider.

1. Understand how CRM systems communicate with the rest of the enterprise

Successful CRM change starts with understanding how customer, product and other related information moves across your organization.

Most of that information travels between applications: service platforms, marketing tools, finance, fulfilment and operational systems. If you don't know where the original record sits, or how it changes on its journey, you lose the traceability required for dependable quality, governance and customer experience.

To build this understanding:

- Catalogue the systems that store your customer, product or other data.
- Identify where records overlap with CRM and where inconsistencies appear.
- Look for places where information is held in ways that complement or conflict with your CRM.

2. Assign ownership and responsibility

Clear ownership is the foundation of effective lineage, governance and accountability.

For each data component, ask a straightforward question: who cares about this?

The answer points you to the people who should steward it, define it and take responsibility when it changes.

To help you identify the right data stewards, it's useful to establish:

- Where each data component should be mastered.
- Who is accountable for quality, accuracy and access.
- Which regulatory expectations and operational needs shape how data must be maintained.

It's also important to support change leaders so they can connect ownership decisions to the outcomes they aim to deliver.

Practical insights and success stories (continued)

3. Look at master data management (MDM) from day one

Whether your decision to explore agentic AI is driven by innovation, market shifts, mergers or divestments, master data needs attention early. Standard CRM systems are designed for processes, not for managing the underlying information they depend on.

Successful outcomes require good data from the start. Even a missing salutation field can affect interactions in noticeable ways, and small errors quickly impact your customer experience if left unaddressed.

As you build or modernize your CRM capability:

- Treat master data as a first-day priority.
- Maintain quality from the beginning rather than correcting it later.
- Keep value visible so you can demonstrate the contribution MDM makes to your transformation goals.

4. Build your model around real-world behaviors

Most systems rarely capture the way people actually work. Over time, teams develop their own methods to keep processes moving, such as repurposing fields and creating shortcut scripts or local spreadsheets.

Ignoring these informal workarounds creates blind spots. If you design a CRM or data model purely from a theoretical perspective, you risk replacing something that works (even if imperfectly) with something that doesn't. A field used as a proxy for location, a legacy SQL report that people trust, or a workaround that keeps records consistent might look incorrect on paper yet still serve an essential purpose.

To design a model for the way your business operates:

- Understand the informal tools and patterns people rely on.
- Identify the gaps these workarounds exist to fill.
- Integrate their logic into the emerging model where it provides genuine value.
- Replace them only when the new approach supports the underlying need more effectively.

Bringing real-world behaviors into your design enables teams to adopt AI-driven processes with minimal disruption. It also increases user acceptance, as people are not forced to adapt to unrealistic processes.

Practical insights and success stories (continued)

5. Design processes that prevent errors and duplicates

The quality of your CRM data is heavily influenced by the steps users follow each day. When processes make it difficult to find existing records or unclear how information should be entered, people unintentionally create duplicates, inconsistencies or gaps.

Simple design choices — such as using forced search before new records can be created, or guiding users through structured data entry — can prevent these issues. Clear workflows also reduce the need for workarounds and allow AI-driven steps to run reliably without being tripped up by inconsistent inputs.

When designing agentic CRM processes:

- Make it easy for users to find existing records before new ones are created.
- Reduce ambiguity in how information should be entered.
- Build flows that discourage duplicate or incomplete records.
- Use prompts and simple checks to steer users toward consistent inputs.

6. Consider tools and data quality checks for enrichment and validation

To verify and improve the quality of your customer, product and service information, you need defined data quality checks as a starting point. These checks ensure that information is complete, consistent and fit for use before it is shared across systems or used by agents.

Data quality rules and external enrichment and validation tools can then be used to strengthen internal quality checks. These services work by comparing your records against trusted third-party sources to add missing details or confirm that existing information is still accurate. Enrichment tools fill gaps — for example, completing partial addresses, standardizing contact details or correcting information that has been stored in the wrong field. Validation tools check whether your records remain correct by verifying changes of address, updating key attributes or confirming that a customer is still contactable.

To get the most from enrichment and validation tools:

- Build a stable baseline before introducing external sources.
- Resolve structural and field-level issues so new information is applied correctly.
- Introduce checks once ownership and master data rules are established.
- Use external inputs where they strengthen decisions, not to cover gaps in core data.

Your CRM's next chapter is written in your data

Agentic CRM is changing how customer processes operate. Decisions that once required human input — from clarifying intent to confirming eligibility or coordinating activity across teams — will increasingly be supported, and in some cases initiated, by agents. And the quality of those decisions will depend entirely on the data they draw from.

Right now, most organizations see the benefits of agentic capability, but many are held back by the fundamentals of data management. When definitions vary, ownership is unclear, data is not consistent or records lack traceability, even well-designed agentic processes fall short.

In contrast, when information is contextual, consistent, good quality and trusted across the systems that hold it, agentic CRM becomes far more reliable. Processes connect without friction. Customer interactions reflect a more complete picture. Operational decisions become more consistent because they are anchored in data that can be trusted.

For enterprise architects, data management leaders and application owners, your priority is ensuring that your systems are underpinned by dependable information. Agentic CRM will amplify well-managed data and expose the gaps in anything less.

By investing in your data foundations today, you give your organization the conditions to move confidently into the next chapter of CRM: a chapter where systems support customer relationships with a depth and consistency not previously possible.

To find out how Informatica and Cloud Perspective can support you to strengthen your data management CRM foundation, visit ***www.informatica.com***

About Us

About Informatica

Informatica from Salesforce is a leader in AI-powered enterprise cloud data management. Its Intelligent Data Management Cloud (IDMC) platform enables organizations to connect, manage and unify AI-ready data across the enterprise. With capabilities spanning data cataloging, integration, governance, quality, privacy, metadata management and master data management, Informatica supports a broad partner ecosystem and helps customers unlock the full value of their data and AI initiatives.

About Salesforce

Salesforce is the #1 AI CRM, empowering companies to connect with their customers in a whole new way through the power of artificial intelligence, data, and trust. For more information about Salesforce (NYSE: CRM), visit: www.salesforce.com.

About Cloud Perspective

Cloud Perspective Ltd is a specialist data consultancy focused on the integration of enterprise application systems and the mastering of critical business data. We consolidate data from multiple sources to create single, authoritative views across key domains such as Customer, Vendor, Product, Material, Asset, and Location.

In addition to data integration, we provide expert services in the implementation of Data Governance frameworks, Data Lineage solutions, and Data Quality initiatives—supporting organisations in achieving data transparency, compliance, and operational efficiency.

Cloud Perspective has deep, proven expertise in the implementation and modernisation of the Informatica product suite.

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