

PRACTICAL SPEECH

The AI CRM Agentic Map



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Sales and Marketing Are **Critically Misaligned**

When sales and marketing work in siloes, the customer experience is siloed and revenue is at risk

Sales-and-marketing misalignment costs companies an estimated

\$1 Trillion

in lost productivity and growth per year

CHALLENGES ABOUND

Sales & Marketing Need More **Intelligent Tools**

The sales reality

- ✘ The average sales rep wastes 14 hours per week on administrative tasks. (1)
- ✘ The average buying group spends 15% of their time reconciling conflicting information. (2)
- ✘ 86% of B2B purchases stall during the buying process.(1)

The marketing reality

- ✘ 73% of buyers actively avoid suppliers that send irrelevant outreach. (1)
- ✘ Martech now consumes 22% of marketing spend, but utilization is only 49%. (2)
- ✘ Disciplined spend management can free up to 20% of marketing budgets. (3)

Customer Service Is Harder Than Ever

75%

The percentage of a typical manual support call that is spent searching for client/account information.

Source: IBM.

2X

Annual contact center employee turnover is more than double the average across other occupations.

Source: McKinsey

-72%

The failure rate of CRM projects exceeds the success rate and costs an average of \$6.8M vs. \$1.9M value delivered – a negative 72% ROI.

Source: Gartner

Customer Service is Data Rich But Underserved

Every interaction is a signal, but most go unanalyzed.
The result is a widening gap between operational capability and profitable outcomes.

5%

Increase in customer retention drives a minimum

25%

Increase in profit

Marketing ROI is getting harder to achieve

These are the operational pains we see most often in marketing organizations

Marketers spend too much time on manual tasks

AT STAKE

Marketing throughput

Leads take too long to qualify

AT STAKE

Time to qualified

Leads aren't converting into opportunities fast enough

AT STAKE

MQL to SQL velocity

Leads turn into opportunities that stall or are lost

AT STAKE

Influenced win rate

Leads are unworked or rejected by sales

AT STAKE

Funnel waste

Leads convert to opportunities that are too small

AT STAKE

Targeting precision

Renewal and expansion leads are missed

AT STAKE

Customer marketing impact

Marketing can't accelerate the pipeline

AT STAKE

Pipeline acceleration

Buyers demand more. **Selling is getting harder**

These are the operational pains we see most often in sales organizations

Reps spend too much time on manual tasks

AT STAKE
Selling time

Leads take too long to respond to

AT STAKE
Speed to first touch

Reps aren't closing opportunities fast enough

AT STAKE
Deal cycle length

Too many opportunities stall or are lost

AT STAKE
Win rate

Pipeline doesn't have enough open opportunities

AT STAKE
Pipeline coverage

Pipeline opportunities are too small on average

AT STAKE
Average deal size

Renewal and expansion opportunities are missed

AT STAKE
Net revenue retention

Service interactions don't fuel new sales

AT STAKE
Account growth

Service costs are squeezing margins and CSAT

These are the operational pains we see most often in service organizations

Service agents spend too much time on manual tasks

AT STAKE
Cost to serve

Cases take too long to assign so work can begin

AT STAKE
Time to first response

Cases take too long to resolve once started

AT STAKE
Average handle time

Repetitive cases are still handled manually

AT STAKE
Case deflection rate

Escalations are slow or wrongly routed

AT STAKE
SLA breach rate

Agents lack the info needed to satisfy customers

AT STAKE
First-contact resolution

CSAT and revenue aren't connected to case resolution

AT STAKE
Retention impact

Service interactions don't fuel new sales

AT STAKE
Customer growth

Introducing **Creatio Agentic Maps**

Creatio Agentic Maps are structured lists of AI CRM use cases organized across sales, marketing, and service domains from strategy and planning through pipeline and revenue optimization, and post sale experiences.

AI CRM + People

108 High Value
Use Cases



Valuable Agentic
Outcomes

THE MARKETING AGENTIC MAP

36 Marketing use cases to build your revenue pipeline



Audience Segmentation & Targeting

M-01 Audience Discovery	M-03 Dynamic Audience Refresh	M-05 Cross-Campaign Segment Reuse
M-02 Segment Design Guidance	M-04 Engagement-Based Segmentation	

Email Creation & Editing

M-06 Email Content Drafting	M-08 Content Localization	M-10 Email Layout Structuring
M-07 Message Refinement & Tone	M-09 Template Adaptation	M-11 Campaign Format Consistency

Campaign Setup & Management

M-12 Bulk Campaign Creation	M-14 Campaign Intent Recognition	M-16 Template & Workflow Reuse	M-24 Event Management
M-13 Campaign Naming & Organization	M-15 Campaign Standards Enforcement	M-17 Cross-Channel Campaign Setup	

Campaign Optimization & Feedback

M-18 Subject Line Optimization	M-20 Campaign Response Summary	M-22 Engagement Issue Detection
M-19 Deliverability Diagnostics	M-21 Message Performance Comparison	M-23 Campaign Adjustment Recommendations

Conversion & Lead Qualification

M-25 Conversion Driver Explanation	M-27 Account Intelligence Brief	M-29 Lead Scoring
M-26 Stalled Lead Diagnosis	M-28 Intent Data Mining & Signals	M-30 Sales-Ready Lead Identification

Lead Routing & Sales Alignment

M-31 Lead Context Preparation	M-33 Sales Follow-Up Alerts	M-35 Routing Rule Application
M-32 Lead Distribution	M-34 Handoff Consistency Control	M-36 Unworked Lead Detection

Surface accounts and contacts showing active buying intent — research signals, content consumption, and competitive activity — before they go cold.

Pain Points

Intent signals not integrated into marketing workflows; in-market accounts missed before competitors engage; nurture tracks not triggered by buying behavior

How Creatio Helps

- Reviews CRM engagement, website activity, campaign responses, and available intent signals to identify emerging buyer interest.
- Highlights accounts or contacts showing repeated activity around specific topics, products, or business problems.
- Explains which signals indicate stronger intent, such as content depth, recency, frequency, or fit.
- Groups high-intent audiences by topic, account profile, lifecycle stage, or campaign readiness.
- Creates ready-to-review segments or account lists for ABM, nurture, or sales-aligned campaign motions.

Business Outcomes

Increase pipeline from intent-driven outreach; improve MQL quality; reduce time to engage in-market accounts

AI CRM Capabilities

- Account conversion insights
- Contact conversion insights
- Audience filtering
- Engagement signal analysis
- External intent signal detection (custom)



Demand Generation Manager

Find accounts showing new buying intent around supply chain automation

Intent Signal Detection

Intent signals found:

[Supply Chain Automation Intent Accounts >](#)

Top signals:

- **Topic spike:** Increased activity around warehouse automation and order visibility
- **Engagement:** 18 contacts viewed related content in the last 14 days
- **Competitive activity:** Increased views of comparison and evaluation content
- **Emerging audience:** 6 accounts are not currently in active nurture

Recommended action:

- Create an ABM segment for high-fit distributors and add the 6 uncovered accounts to the next nurture wave.

High-Intent Accounts

24

Uncovered Accounts

6

Open Account List

Create ABM Segment

Add to Nurture

THE SALES AGENTIC MAP

36 Sales use cases to drive revenue growth



Sales Planning

S-01 Pipeline & Forecast Analysis	S-03 Quota & Performance Analysis	S-05 Account Tiering
S-02 Whitespace Penetration Planning	S-04 Territories Allocation	S-06 Churn & Risk Prediction

Meeting Preparation & Execution

S-07 Earnings Call & Public Signal Analysis	S-09 Sales Collateral Recommendations	S-11 Tailored Follow-Ups
S-08 Stakeholder Mapping	S-10 Conversation Summary	S-12 Auto CRM Updates

Sales Enablement

S-13 Meeting Preparation	S-15 Account Plan Creation	S-17 Field Visits Planning	S-19 Role-Play Simulation	S-21 Win/Loss Analysis	S-23 Competitive Battlecards
S-14 Account/Contact Insights	S-16 Next-Best Actions	S-18 Field Updates Gathering	S-20 Coaching Recommendations	S-22 Training Content Generation	S-24 Success Story Recommendations

Pipeline & Deal Execution

S-25 RFP Parsing & Response	S-27 Negotiation Guide	S-29 ROI Case Building
S-26 Quote Generation	S-28 Opportunity Insights	S-30 Deal Health Scoring

Prospecting

S-31 Lead Enrichment	S-33 Account Intelligence Brief	S-35 Intent Data Mining & Signals
S-32 Lead Distribution	S-34 Lead Scoring	S-36 Autonomous Outreach Execution

Cards colored by Agentic Maturity Band — Basic builds confidence first, then Intermediate, then Advanced.

Analyze pipeline **health** and forecast accuracy in real time — no manual spreadsheet required.

Pain Points

Forecast built on rep estimates, not data; pipeline reviews consuming manager time; surprises at quarter end.

How Creatio Helps

- Consolidates pipeline, opportunity, activity, and forecast signals into one real-time management view.
- Highlights forecast risk, stalled deals, coverage gaps, and missing next steps before quarter-end.
- Generates roll-up views by team, region, segment, stage, or forecast category.
- Explains which deals are driving forecast movement so managers can inspect the right opportunities.
- Prepares a forecast review summary with the key risk deals, coverage gaps, and movements managers should inspect first.

Business Outcomes

Increase forecast accuracy; improve pipeline visibility; reduce manager admin burden

AI CRM Capabilities

- Natural language analytics
- Pipeline visualization
- Opportunity insights
- Opportunity summarization
- Activity summarization
- Forecast confidence insights
- Recommended next steps



Sales Manager

Analyze this quarter's enterprise pipeline and identify forecast risks

Pipeline Forecast Analysis

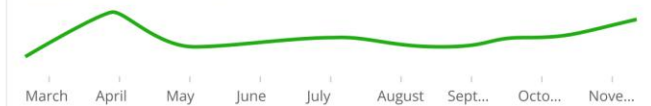
Forecast risk summary:

- **Coverage gap:** Enterprise pipeline is below target for Q3 commit.
- **Forecast risk:** 6 late-stage deals have no confirmed next meeting.
- **Stage concern:** Proposal-stage opportunities are aging longer than last quarter.
- **Positive signal:** Manufacturing segment pipeline increased this month.

Recommended actions:

Review stalled commit deals and confirm next steps with opportunity owners.

Enterprise Pipeline Trend



Pipeline Coverage

2.7x

Forecast Risk

Medium

Commit at Risk

\$420K

View Risk Deals

Export Summary

THE SERVICE AGENTIC MAP

36 Service use cases to drive customer growth



Service Strategy & Planning

SV-01 Service Demand Forecasting	SV-03 Capacity & Workforce Planning	SV-05 Cost-to-Serve Analysis
SV-02 Case Volume & Channel Analysis	SV-04 SLA Policy & Priority Modeling	SV-06 Service Performance Benchmarking

Customer & Case Intelligence

SV-07 Customer Insights	SV-09 Sentiment & Urgency Scoring	SV-11 Repeat Issue Detection
SV-08 Classification & Intent Detection	SV-10 Root Cause Identification	SV-12 Customer Risk & Escalation Prediction

Case Management & Orchestration

SV-13 Case Routing	SV-15 SLA & Escalation Orchestration	SV-17 Priority Rebalancing
SV-14 Next-Best Action	SV-16 Cross-Team Case Handoff Automation	SV-18 End-to-End Case Lifecycle Orchestration

Agent Assistance & Productivity

SV-19 Real-Time Agent Guidance	SV-21 Response Drafting & Summarization	SV-23 Resolution Path Recommendation
SV-20 Knowledge Article Recommendation	SV-22 Policy & Compliance Validation	SV-24 After-Call / After-Case Automation

Digital Service & Self-Service

SV-25 Chat Case Agent	SV-27 Guided Troubleshooting	SV-29 Autonomous Issue Resolution
SV-26 Self-Service Case Deflection	SV-28 Voice Case Agent	SV-30 Proactive Issue Notification

Service Operations & Optimization

SV-31 QA Monitoring & Interaction Scoring	SV-33 SLA Breach Prediction & Prevention	SV-35 Customer Satisfaction & NPS Analysis
SV-32 Agent Performance Coaching	SV-34 Compliance, Audit & Governance Agent	SV-36 Service ROI & Cost Optimization

Churn & Risk Prediction

Proactively surface at-risk accounts before **renewal** conversations — with AI-scored risk signals across all touchpoints.

Pain Points

Churn identified too late to intervene; CSMs managing by relationship rather than signals; reactive renewal motions

How Creatio Helps

- Consolidates account activity, renewal context, open opportunities, and service history into one risk view.
- Highlights churn signals such as unresolved cases, declining engagement, delayed follow-ups, or negative account changes.
- Summarizes the key reasons an account may be at risk before the renewal conversation.
- Suggests practical retention actions such as executive outreach, service follow-up, or renewal plan review.
- Helps sales and customer success teams intervene earlier with a shared view of account risk.

Business Outcomes

Reduce customer churn; improve net revenue retention; increase renewal win rates

AI CRM Capabilities

- Account and contact insights
- Opportunity summarization
- Activity summarization
- Account news and signals
- Case context retrieval
- Churn signal detection (custom)
- Recommended next steps



Customer Success Manager

Show churn risk signals for Lakeside before the renewal review

Account Risk Alert

Account risk alert for **Lakeside**:

- **Risk level:** High
- **Renewal context:** Renewal due in 45 days
- **Service signal:** Two unresolved cases related to online banking support delays
- **Engagement signal:** No executive touchpoint in the last 60 days
- **Account change:** New COO announced a member experience improvement initiative

Recommended action:

- Schedule an executive check-in and align the renewal plan to faster digital service resolution.

Churn Risk

High

Renewal Window

45 days

Create Retention Plan

Draft Executive Email

View Open Cases

Deloitte.

73%

of leaders cite “inability to define metrics” as the #1 barrier to capturing value from digital transformation

Map Your Organization's Pain Points to AI CRM Value

Buyers demand more. Selling is getting harder.



These are the operational pains we see most often in sales organizations.

Reps spend too much time on manual tasks <small>AT STAKE</small> Selling time	Leads take too long to respond to <small>AT STAKE</small> Speed to first touch	Reps aren't closing opportunities fast enough <small>AT STAKE</small> Deal cycle length	Too many opportunities stall or are lost <small>AT STAKE</small> Win rate
Pipeline doesn't have enough open opportunities <small>AT STAKE</small> Pipeline coverage	Pipeline opportunities are too small on average <small>AT STAKE</small> Average deal size	Renewal and expansion opportunities are missed <small>AT STAKE</small> Net revenue retention	Service interactions don't fuel new sales <small>AT STAKE</small> Account growth



THE USE CASE LIBRARY — SALES

36 Sales use cases to drive revenue growth



Basic Intermediate Advanced

Sales Planning			Meeting Preparation & Execution				Sales Enablement				
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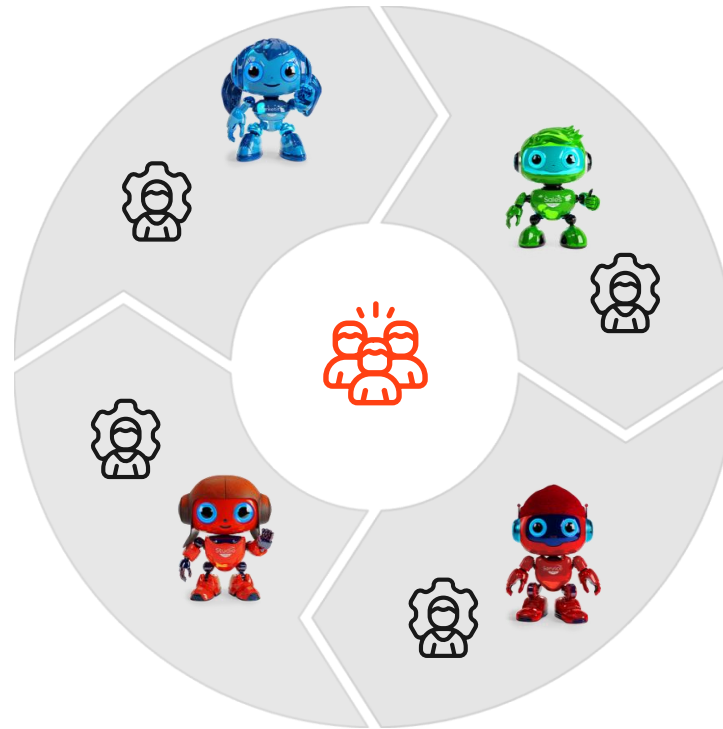
Use **Agentic Maps** to Build an **Intelligent Customer Flywheel**

1. Marketing engagement

AI CRM frees marketers to drive more customer engagement, lower costs, share more engagement insights.

4. Unified insights

AI CRM unifies marketing, sales, and service interactions into one central intelligence layer to drive better customer experiences.



2. Sales engagement

AI CRM frees salespeople to have more conversations, personalize more interactions, and share more conversation insights.

3. Service engagement

AI CRM frees service people to solve more cases, improve satisfaction scores and share more customer insights.



Customers



Employees



AI Agents



From Agentic Maps to Quantified **Agentic Value** and **ROI**

The Creatio AI Package Estimator turns roles and use cases into a quantified investment case

AI Package Estimation

Using operational inputs and selected use cases, the AI Estimator:

- Models projected AI action consumption
- Aligns consumption to recommended AI package tier
- Helps set expectations for scaling and adoption

ROI Modeling

In parallel, this case is also converted into quantified economic impact:

- Measures productivity gains or revenue uplift tied to baseline metrics
- Annualizes impact based on documented activity levels
- Helps align value delivered to investment required



Talk to your Creatio sales representative today!

AI Package Estimator

A quick way to size the time saved, the value, and the right Creatio AI package for your team. Tell us about your headcount or pick the AI use cases you'd most like to put to work — the numbers update as you go.

By team size | By use cases

STEP 1 — YOUR TEAM

Tell us about the people on your revenue teams and a rough estimate of how often each role would lean on AI. A typical front-line user generates 200-500 AI actions per month across drafting, summarizing, routing, and updating work.

	HEADCOUNT	AI ACTIONS / PERSON / MONTH
Sales	50	300 180,000 actions / year
Marketing	10	300 36,000 actions / year
Service	50	300 180,000 actions / year

STEP 2 — TIME AND VALUE ASSUMPTIONS

Four simple numbers translate AI usage into hours saved, FTE equivalent, and cost savings. Adjust any of them to match what feels right for your team — every number on the right updates instantly.

TIME SAVED PER AI ACTION	AVERAGE ANNUAL SALARY
1.0 minutes	\$ 80,000
Conservative range: 0.5 - 2.0 minutes per action	Fully loaded, used to translate hours saved into dollars
PRODUCTIVE HOURS PER WEEK	PRODUCTIVE WEEKS PER YEAR
40 hours	48 weeks
Standard full-time work week	52 weeks minus typical PTO, holidays, and training
One FTE = 40 hrs/week * 48 weeks/year = 1,920 productive hours / year	

ESTIMATED CREATIO AI PACKAGE

396,000
ESTIMATED ANNUAL AI ACTIONS

ACCELERATE
\$75,000 / year list
Corporate / Enterprise default — multi-domain AI in daily use.

UTILIZATION: 79% OF PACKAGE

START < 25K | GROW < 15K | **ACCELERATE < 500K** | SCALE < 1M | FREEDOM > 1M

ESTIMATED VALUE (TIME SAVED)

NET ANNUAL SAVINGS	FTE EQUIVALENT
\$200,000 <small>Indicative annual labor value minus AI package cost</small>	3.4 <small>Hours saved ÷ 1920 hrs/FTE</small>

HOW WE GOT HERE

Annual AI actions	396,000
+ Time saved per action	1.0 min
+ 60 minutes per hour	60
= Hours saved / year	6,600
Hours saved / year	6,600
+ Hours per FTE / year (40 + 48 = 1,920)	1,920
= FTE equivalent	3.44
Average annual salary	\$80,000
+ Hours per FTE / year	1,920

Next Steps

Just beginning with AI CRM?

- Audit your organization's challenges and pain points
- Map your challenges to the Agentic Map
- Identify your top use cases and value drivers
- Start with the most basic use cases and grow from there

Already using AI CRM?

- Continue to mature the high priority use cases you have in production
- Use the Agentic Map to pilot additional use cases you have in production
- Start combining AI agents and skills into workflows and apps
- Start moving to outcome-based metrics

Ready to master AI CRM?

- Use the Agentic Map to expand your use cases and maximize the value they bring
- Start building autonomous AI agents that work with other agents
- Build use case-based dashboards with value drivers and outcomes mapped to your use cases and AI agents

Thank you!