Tenon | servicenow

UNTAPPED POTENTIAL

What Marketers Can Do With CRM Data

You don't need another tool.

With more than 15,000 martech solutions available today, most marketing teams aren't short on tools. But the average enterprise team uses just a fraction (33%) of the capabilities available in what it already owns.

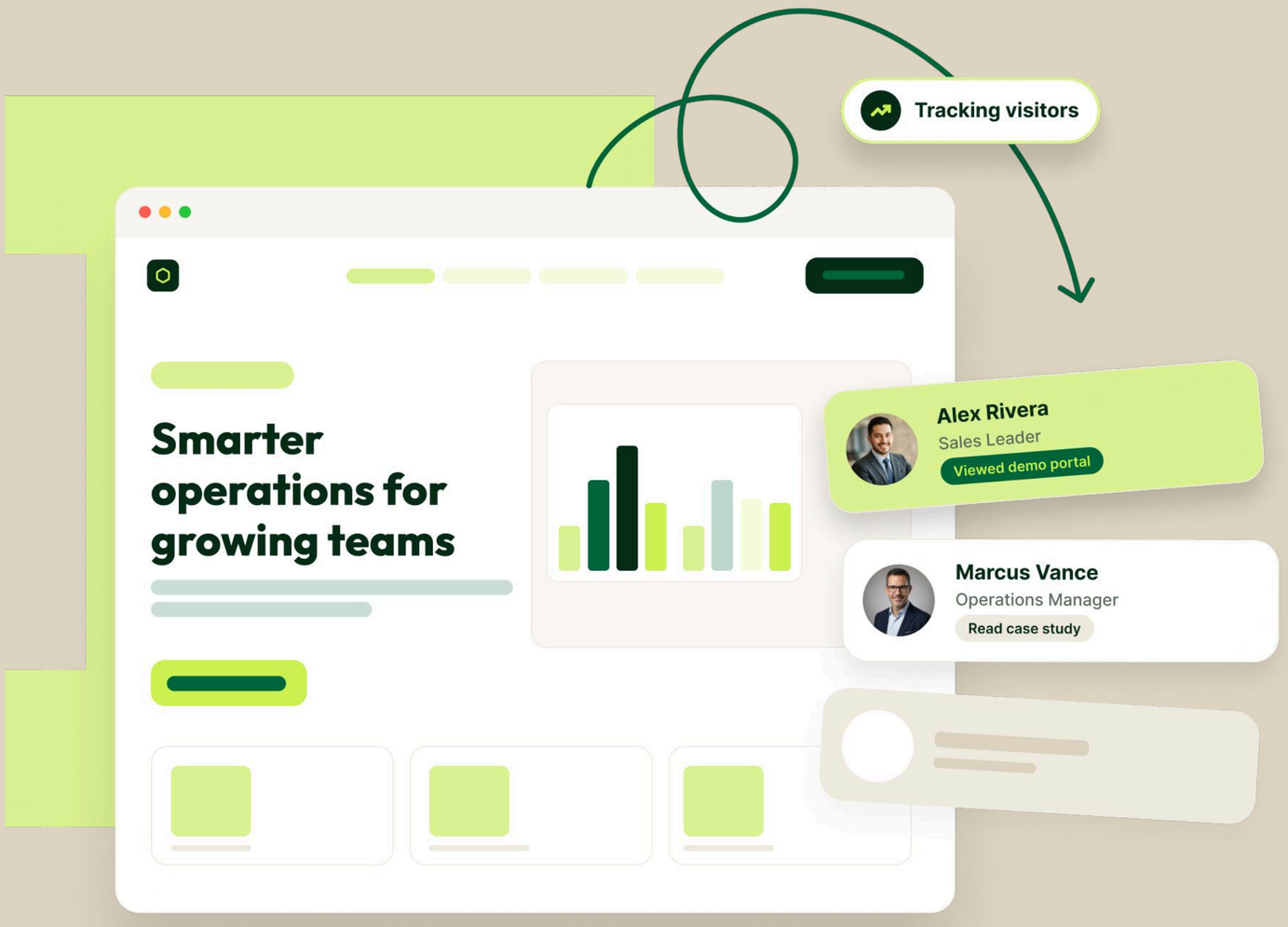
That gap points to something simpler than a buying problem. Stacks have grown too complex, overlap is everywhere, and teams lack the in-house expertise to run them well. As a result, marketers can't use the data inside these systems.

Deloitte's CMO Survey backs this up. Companies report using only 51.5% of the martech tools they've purchased. That's pure wasted budget.

But customer expectations keep climbing. Buyers want personalization from the first email to post-purchase support, and disconnected systems get in the way. Marketing operates off one view of the customer, while sales and service rely on another.

Budgets go to campaigns that miss the mark, leaving leaders struggling to justify the spend, even though the right data was sitting in one system the whole time.

Put the customer relationship management (CRM) platform you already own to work before you buy more software.



Owned vs. inherited data

Marketing works with two kinds of data that live in your CRM:

Owned data

is what marketing generates and controls directly, like email engagement, campaign activity, form fills, and website visits.

Inherited data

is everything else marketing has access to but rarely puts to use, including sales notes, service tickets, product usage, and account activity. Other teams generate it for different purposes, and that’s why marketing often overlooks it.

Most teams have gotten good at using their own data. It's the inherited data that goes untouched, even though a service ticket about a billing issue, a note from a sales call, or a spike in product logins offers valuable insights. When combined, those clues can tell you more about what a buyer needs than a year of email opens.

The data is already in your systems, but it's not working for you yet.

5 ways to use your CRM data to the fullest

Marketers have more data than ever, but most of it is isolated across CRM, sales, service, and operations. A bigger budget or massive implementation won't fix that.

When you connect the systems you already own, your campaigns get smarter without upping your budget. Here's how to do it, starting with your CRM.

1. Use the data you already have

Unlock the value of the data you already have before looking for more.

Before shopping for a new data source, take stock of what's already in your CRM fields, activity history, and account records.

That data can do far more than basic firmographics like job title or company size. You can use it to:

- Build sharper audience segments.
- Tailor efforts to real customer behavior.
- Identify hidden upsell opportunities.

Since these segments reflect customer actions, they'll predict what a customer will do next better than firmographics alone. After all, a shopper who just returned an item over a sizing issue needs a very different follow-up than someone ready to reorder.

A retail brand might combine its purchase history, loyalty data, and service interactions to recommend the right product at the right time. An in-flight entertainment provider can do the same with passenger usage data, automatically promoting premium content or a connectivity upgrade based on what travelers do mid-flight.

Don't try to fix everything at once. Pick one dataset, one segment, and one offer to see what changes when you rely on information you already own.

This week, pull one CRM segment you've never used and see what it tells you. You might find a cluster of high-value customers your team has been treating like everyone else, or a group that's been ready to buy for months.

2. Break down the walls between departments

Shared data creates a shared understanding of the customer.

Sales, service, and product all hold customer data that marketing rarely taps into. Shared data gives you a single, accurate view of the buyer.

Someone in marketing needs to own this conversation. That means assigning a designated point person and setting a regular cadence for marketing, sales, and service to compare notes.

Once you have that foundation in place, you can:

- Use sales activity to sharpen nurture timing.
- Let service interactions shape your next message.
- Give sales visibility to prevent overlapping outreach.

In healthcare, marketing can use patient engagement data to send more relevant care guides. Clinical teams can see what information a patient has already received, and no one ends up sending a generic wellness reminder to someone who was in the clinic for that exact concern yesterday. Enterprise software teams can run the same play in reverse, surfacing product-activation milestones to sales reps so they can spot high-intent accounts and prioritize outreach.

Start small by assigning one person to ask sales and service what they're seeing, then set up a standing 15-minute biweekly sync or a shared channel to flag notable account activity.

Without that shared view, you risk sending off-target messages at the wrong time and slowly chipping away at customer trust.

3. Turn customer signals into action

Turn the data you collect into smarter, more timely action.

Your CRM is already tracking signals you can act on right now:

Time in stage

Drop-off points

Activity spikes

Account changes

Each of these signals can trigger a specific response, like an email or SMS, a tailored journey, a recommended product, or an alert for sales or service to follow up. A regional car wash chain, for example, can spot members whose visits are starting to lapse and send a timely push notification or SMS offer to bring them back.

In financial services, an account creation might automatically kick off a welcome sequence. From there, AI can help determine the smartest follow-up, whether that's sending relevant educational content, suggesting a complementary product, or flagging the customer for personal outreach.

This example follows the signal → insight → next best action → personalized engagement flow, and it works the same for any signal your CRM tracks. Instead of being predictive, AI's role here is to help you react to data you already have.

The signals themselves live in fields your team already fills out every day:

Support ticket type

Last contact date

Opportunity status

Lead stage

A ticket reopened twice in a week, or a contract nearing renewal, is the flag any rep would act on instantly if they happened to see it. The shift is treating those fields as automated triggers.

4. Automate the customer journey

Let customer data determine what happens next.

Calendar-based drips send messages according to a schedule. Reactive journeys send them based on what your customer does, responding in real time to the lifecycle and status changes your CRM tracks.

Focus your efforts on these journey types first:

Onboarding

Guides new buyers through their first weeks, adjusting to what they've set up or used

Renewal

Kicks off earlier for accounts with declining usage and later for accounts on track to re-up

Re-engagement

Targets dormant accounts based on inactivity

Lead nurture

Responds to active buying signals as they pop up

In telecom, a service upgrade might automatically trigger a confirmation, followed by setup tips and relevant add-ons, all timed to where the customer is in the setup process. A credit union can do the same with life-event and transaction signals, recommending the right financial product at the moment a member's needs change.

Automations let your CRM data decide what happens next, which frees your team to focus on strategy. Customer actions launch the sequence, and every follow-up adapts to what happened.

5. Measure what matters (and use it to improve)

Don’t just report on marketing activity. Use your metrics to make your next move smarter.

“Did they click?” isn’t the question you should be asking. What matters most is whether they took the action you wanted.

Push past opens, clicks, and reply rates, and connect your metrics to commercial outcomes:



Pipeline



Revenue



Product adoption



Retention

A technology company might track onboarding campaign engagement alongside product usage. If customers who engage with a specific guide adopt key features faster, that insight should reshape the onboarding flow for every new customer behind them. A broadband provider could use service-usage data to target upsell and retention campaigns across email and SMS, then measure which campaigns drive incremental revenue.

Treat this as an ongoing loop:

Data → Action → Measurement → Insight → Better Action

What you measure should directly inform your next campaign. Over time, your marketing gets sharper, and you don't have to start from scratch with every launch.

Connecting campaigns to business outcomes is also your strongest defense at budget time. Open rates rarely protect a line item, but pipeline influence, product adoption, and retention numbers command attention because they map directly to revenue. Your CRM holds the thread that ties them all together.

Where it all comes to life: ServiceNow + Tenon

For many enterprise teams, ServiceNow is the single source of truth for customer, sales, and service data. Connecting marketing to that existing engine gives you speed and scale without adding new software.

Turn CRM data into marketing fuel

Live CRM data should directly power your segmentation, personalization, and lead nurture. Segments update automatically as account records change, pulling live field values.

Nurture triggers are built to fire the moment a status changes, so a customer doesn't sit in the wrong track waiting for a batch job to catch up. If a prospect downgrades their plan, they drop out of an upsell campaign that same day. With exports, it could take weeks.

Since Tenon is a native-built application on ServiceNow, there's no export-and-import step between your CRM and marketing execution. Marketing operates on the same data, schema, and automation engine as sales and service, giving your team direct access on day one, without an IT ticket or a new system to learn.

A marketer building a segment today sees the same record a sales rep updated an hour ago. That gap, as small as it sounds, can make a message either relevant or awkward.

Retail brands like UGG are already using this setup to turn live CRM data into more relevant campaigns, moving past stale lists to deliver the real-time relevance consumers expect. McKinsey research also shows personalization can lift revenue by 5–15% and lower customer acquisition costs by as much as 50%. Returns of this magnitude come from data that’s current and connected.

Align with sales & service

Leads and opportunities lose context as they move between marketing, sales, and service. Each team ends up working from a slightly different picture of the same customer.

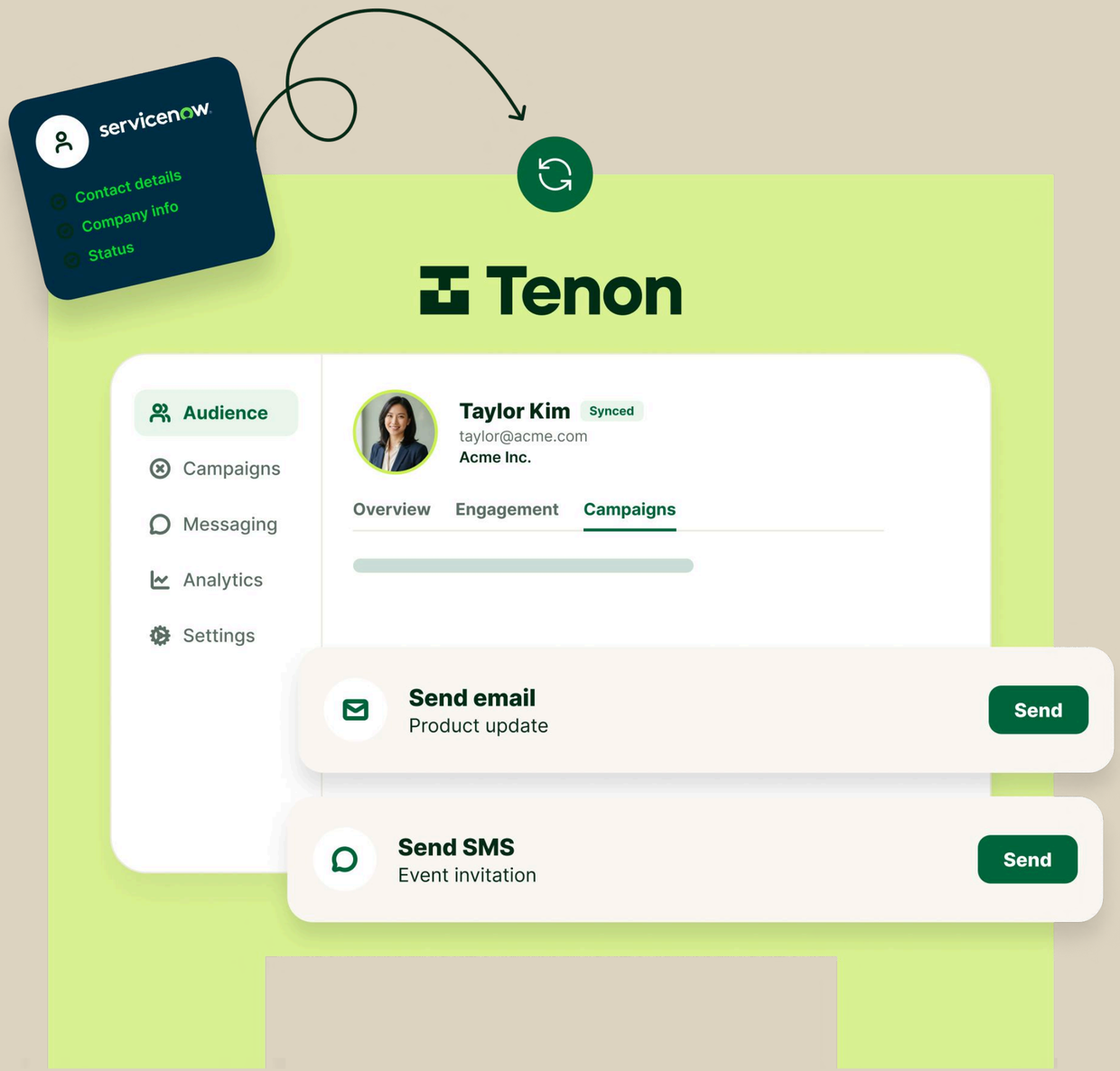
When those teams share a single ServiceNow record, that handoff problem disappears. Sales reps can see a prospect's full marketing history the moment a lead converts, and service updates flow back to marketing without a manual sync.

That's the payoff of treating sales and service as allies. Their daily activity, like deal stages, ticket histories, and renewal dates, is the same data that fuels smarter marketing.

A rep who knows a prospect just read three product guides enters a sales call with a targeted strategy. Service reps get the same advantage in reverse. They can pull up a customer's recent email activity before a support call.

Companies like AVASOFT and MCNC used Tenon, built on ServiceNow, to solve this exact disconnect. They brought their front-office teams onto a single system of record to give marketing, sales, and service a shared view of the customer they'd never had before.

Alignment also carries through to reporting. Since campaign metrics and CRM data live in the same place, marketing can show its direct impact on pipeline and revenue alongside sales performance. Budget conversations become straightforward and grounded in shared numbers.



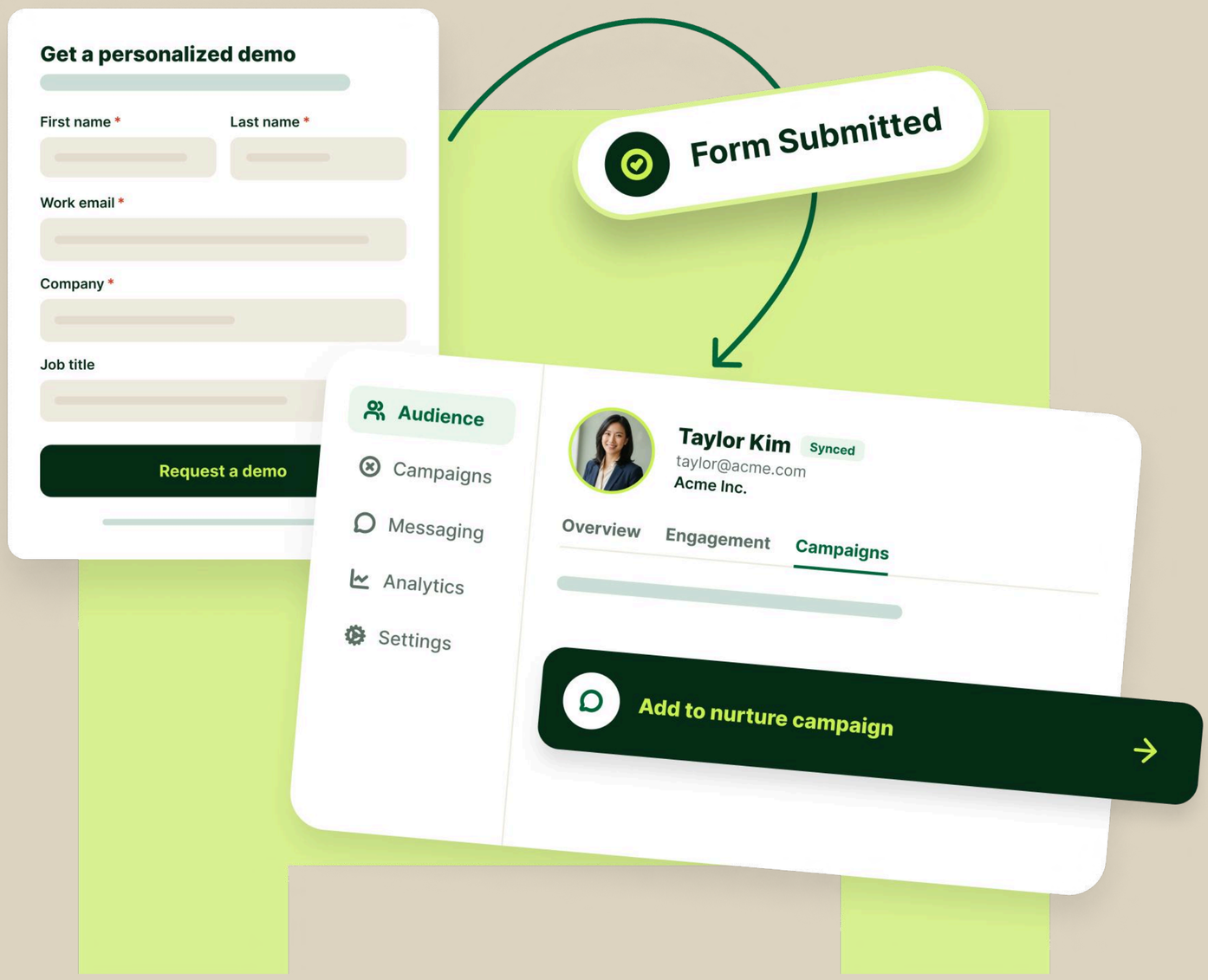
Agentic AI for marketing

Agentic AI in Tenon stays grounded in two high-impact use cases: data hygiene and lead routing.

It’s designed to flag duplicate or incomplete CRM records before they skew your segments or reports. So if a sales rep logs an account call while a website form creates a second record for that same company, AI can catch the split early, keeping the customer's history unified in one place.

On the routing side, agentic AI is built to evaluate real-time engagement and direct leads to the right queue. A prospect downloading a pricing guide gets assigned straight to the territory owner instead of idling in a shared inbox until someone checks the queue.

It's a practical advantage that helps marketing move faster using data already in the system. Cleaner records build trust in your segmentation, while instant routing prevents warm leads from going cold, all without forcing your team to learn a new workflow.



Getting started

Start with what you have. Before you evaluate another tool, pick one piece of inherited data you've never touched, whether that's a sales note, a service ticket type, or a product usage flag, and find one way to act on it this week. It could be as simple as tapping into the notes a rep writes after every call that no one downstream ever reads.

Small starts like this build momentum faster than a full stack overhaul.

If that data already lives in ServiceNow, Tenon is the fastest way to activate it.

The bottom line

Use what you have

Unlock customer and organizational data that already exists.

Put your data to work

Turn signals into email, SMS, journeys, and automated action.

Work better together

Bring marketing, sales, service, and other teams closer around shared customer insights.

Measure & improve

Connect marketing performance with customer and business outcomes.

Your data tells you what's happening. Tenon helps you decide what happens next.