

Agentic CRM Playbook

How enterprise brands are turning customer data
into a compounding growth engine

MASSIVE ROCKET

Global AI, Braze & Snowflake Agency

Accelerated reliable outcomes for enterprises





Every enterprise brand we speak to has invested in the platforms. CDPs, engagement tools, data warehouses, loyalty programmes. The technology is there. What's changed is that a small number of brands are now using AI agents to close the gap between what those platforms can do and what actually gets delivered to the customer. And they're pulling ahead fast.

The rest are still running campaigns the same way they were five years ago. Same quarterly planning cycles, same manual handoffs, same handful of campaigns per month when the platform could handle hundreds. The gap between those two groups is widening every quarter.

This playbook is about that gap - what's causing it, what the brands on the right side of it are doing differently, and what it takes to get there.

Dan Craig

Commercial Director, Massive Rocket

Executive summary

The 60-second version

The gap is real. Enterprise brands have invested heavily in CRM platforms. Most are still running campaigns the same way they did in 2019. The technology is capable. The operating model between the platform and the customer hasn't changed.

Agentic CRM closes it. A proven five-step method with AI working across every stage – fixing your data, proving commercial impact, and building a programme that gets smarter with every cycle. Your team sets the strategy. Intelligent agents handle the execution.

The window is now. 49% of enterprise AI agent usage is in engineering. Just 4.4% is in marketing. The platforms are shipping agentic capabilities today. The brands that move first will build compounding advantages that become structurally harder to catch.

Your next move. Assess where you are, identify your highest-value bottleneck, and build a roadmap from your reality.



From the present to the future state

The size of opportunity



\$128B

Projected AI-in-CRM market by 2030
(MarketsandMarkets)

\$2.6T - \$4.4T

**Annual value of generative AI
across sales and marketing (McKinsey)**

The gap that nobody talks about



You've invested in the platforms

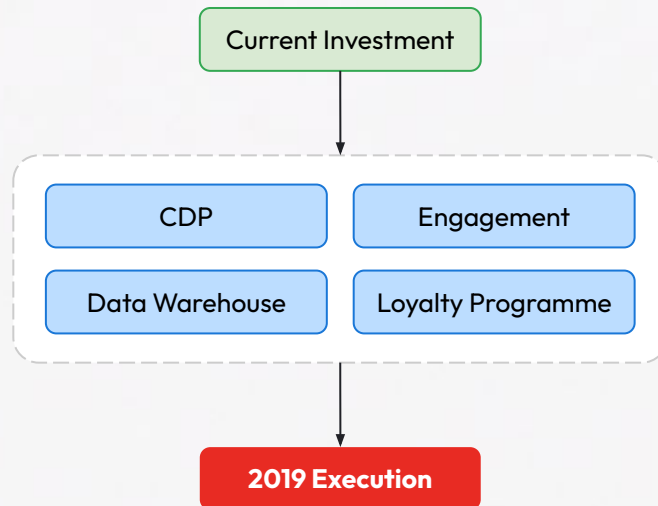
The results haven't followed

CDPs, engagement tools, data warehouses, loyalty programmes. **Enterprise brands have spent heavily over the past five years.**

The technology is there. And yet most organisations are still running their CRM the same way they did in 2019. Campaigns planned quarterly. Personalisation that means swapping a first name into a subject line. Reporting that arrives after the moment has passed.



Enterprises use just 49% of the martech they pay for.
(Gartner)

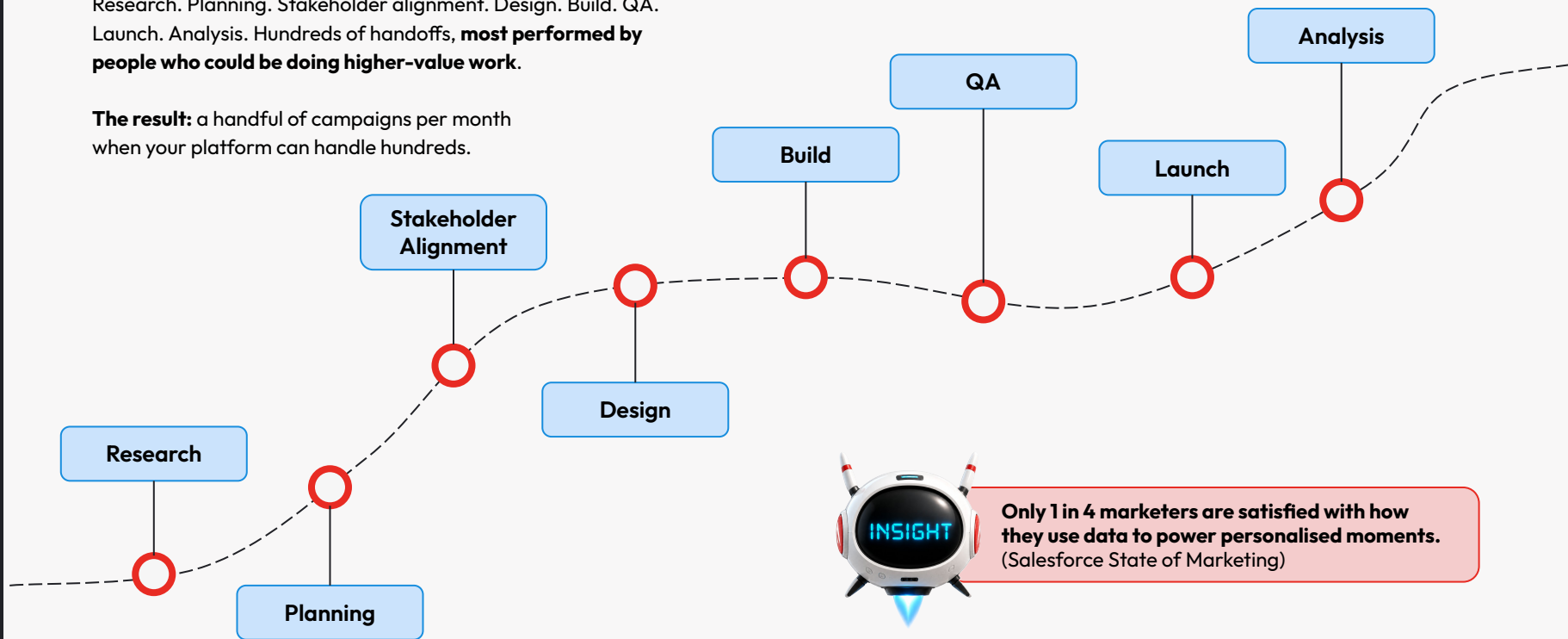


350+ manual steps

To get one personalised campaign out the door

Research. Planning. Stakeholder alignment. Design. Build. QA. Launch. Analysis. Hundreds of handoffs, **most performed by people who could be doing higher-value work.**

The result: a handful of campaigns per month when your platform can handle hundreds.



The challenge isn't the technology

It's how we orchestrate

THE PLATFORMS ARE
CAPABLE
THE TEAMS ARE
TALENTED



Growth is trapped in the **gap**
between what the platform **allows**
and what the process **permits**.

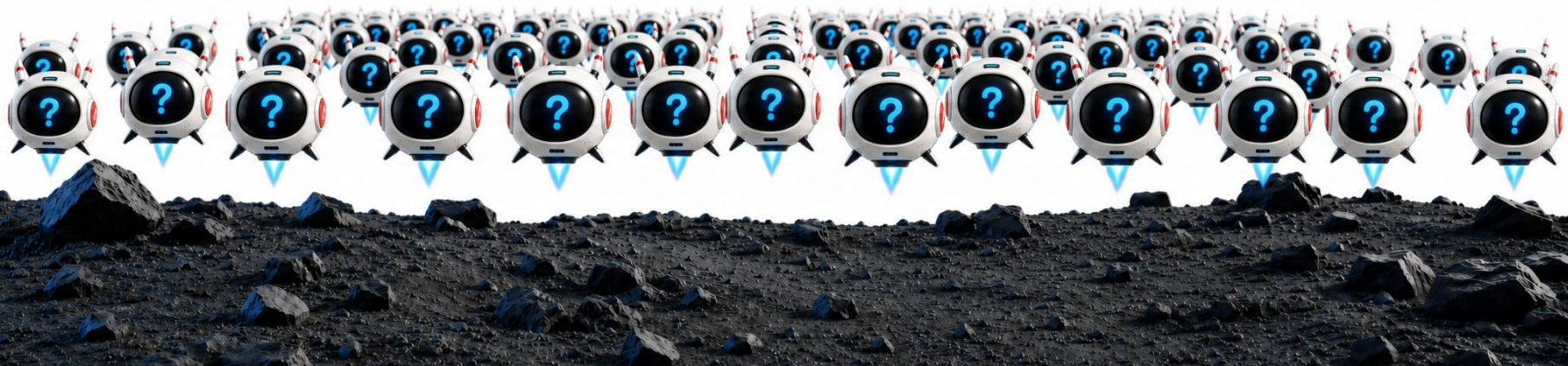
That gap is about to be **solved**.

The operating model between them
hasn't changed



85% of companies believe they deliver
personalised experiences. Only 60%
of customers agree. (Twilio Segment)

What is **Agentic CRM?**



People think CRM is email - it's not

Defining Agentic CRM

Behind every email is an email address.

Behind every email address is a person.

Underneath every CRM platform is a data warehouse.

And inside that warehouse is the cleanest view of your customers you will ever have: who they are, what they buy, what they care about, and what they might need next.

That database is the most valuable asset your company owns.

Most agencies work on the top layer - campaigns and platform management. A campaign agency makes your emails better. A partner that works across data, platforms, and customer intelligence makes your customers more valuable.



**Most agencies send the emails.
We grow your customers.**

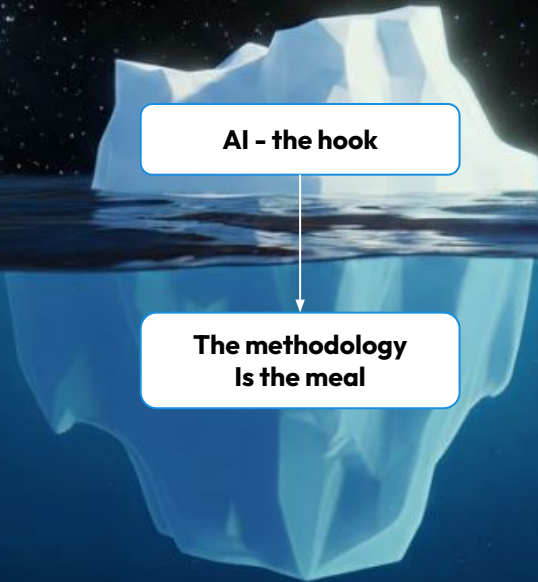


AI is the hook

The methodology is the meal

Agentic CRM is the shift to intelligent agents working continuously across your data, campaigns, and channels. They execute, optimise, and learn without a human triggering every step. Your team sets the strategy, defines the guardrails, and focuses on work that genuinely requires human judgment: brand, creative, relationships, and commercial decisions.

Every platform is racing to ship agentic capabilities. You will not win by picking the right one. You win with the right process underneath - a method that ensures clean data, honest measurement, and commercial accountability before any agent runs a single campaign.



The diagram features a large iceberg floating in a dark blue ocean under a starry night sky with a full moon. The iceberg is split horizontally by the water's surface. The smaller tip above water contains a white box with the text 'AI - the hook'. The much larger base of the iceberg is submerged and contains a white box with the text 'The methodology is the meal'. A thin white arrow points downwards from the top box to the bottom box, indicating a flow or relationship between the two concepts.

AI - the hook

**The methodology
is the meal**

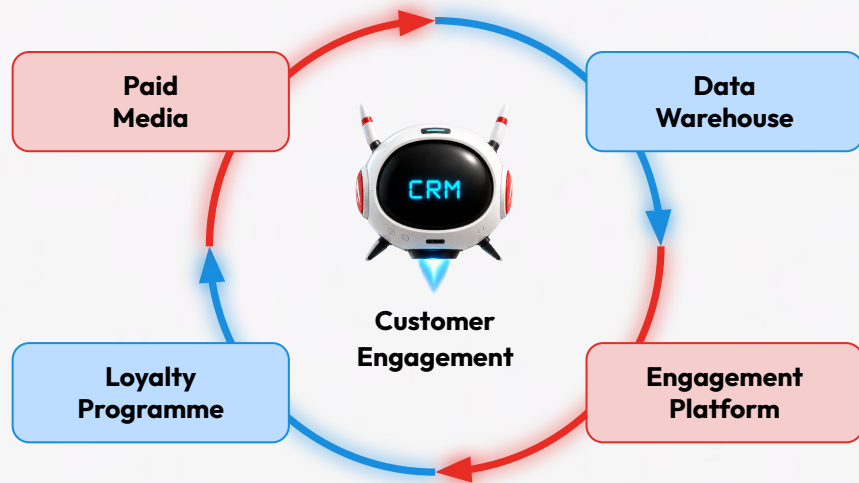
Automation follows rules you set

Agentic CRM makes decisions within boundaries you define

Think of the difference between a thermostat and a building management system.

The thermostat follows one rule. The building management system monitors weather forecasts, occupancy patterns, energy costs, and equipment performance, making decisions across all of those inputs simultaneously.

Agentic CRM does the same for customer engagement. It connects your data warehouse, engagement platform, loyalty programme, and paid media into a single decision-making layer.





The shift from automation to agentic is one of the most misunderstood conversations in CRM right now. People hear 'AI agents' and picture something replacing their team. That's the wrong frame. What changes is the relationship between the human and the system. You stop telling it what to do step by step and start defining the outcome you want, the boundaries it operates within, and the data it can draw on.

The practical difference is enormous. An automated journey fires the same message to the same segment on the same schedule until someone manually changes it. An agentic system looks at what's actually happening with those customers, decides whether that message is still the right one, and adapts. It's the difference between setting a course and having something that continuously navigates.

We're already building this with clients. The technology is ready. The question is whether organisations are willing to change how they work to take advantage of it.

Lorna Argeñal

Senior CRM Team Lead, Massive Rocket

Why this matters **NOW**



49% vs 4.4%

CRM is playing catch up with engineering

49%

of all enterprise AI agent tool calls are in engineering



Engineering moved fast because the preconditions were there: clean data, API-native tools, tight feedback loops.

Just
4.4%

are in marketing and CRM



CRM is behind because the environment is the opposite: closed platforms, fragmented data, no orchestration layer.

Source: Anthropic, 2026

That gap is about to close.
The agentic tools are arriving in marketing.
The question is whether your foundations are ready.



Nearly two-thirds of enterprises have experimented with agents.

**Fewer than 10% have
scaled them to deliver
tangible value.**

Lorna Argeñal

Senior CRM Team Lead, Massive Rocket



The competitive dynamics make this urgent

If you're in QSR, fuel or retail

01

Consumers are spending less.

Inflation has reset spending habits.

Discretionary visits are down.

Every customer interaction **carries more weight.**

02

Aggregator margin erosion is real.

Third-party platforms take **20-30% of every order.**

First-party data and direct relationships are the counter, but only if you can **activate them at speed and scale.**

03

Switching costs are near zero.

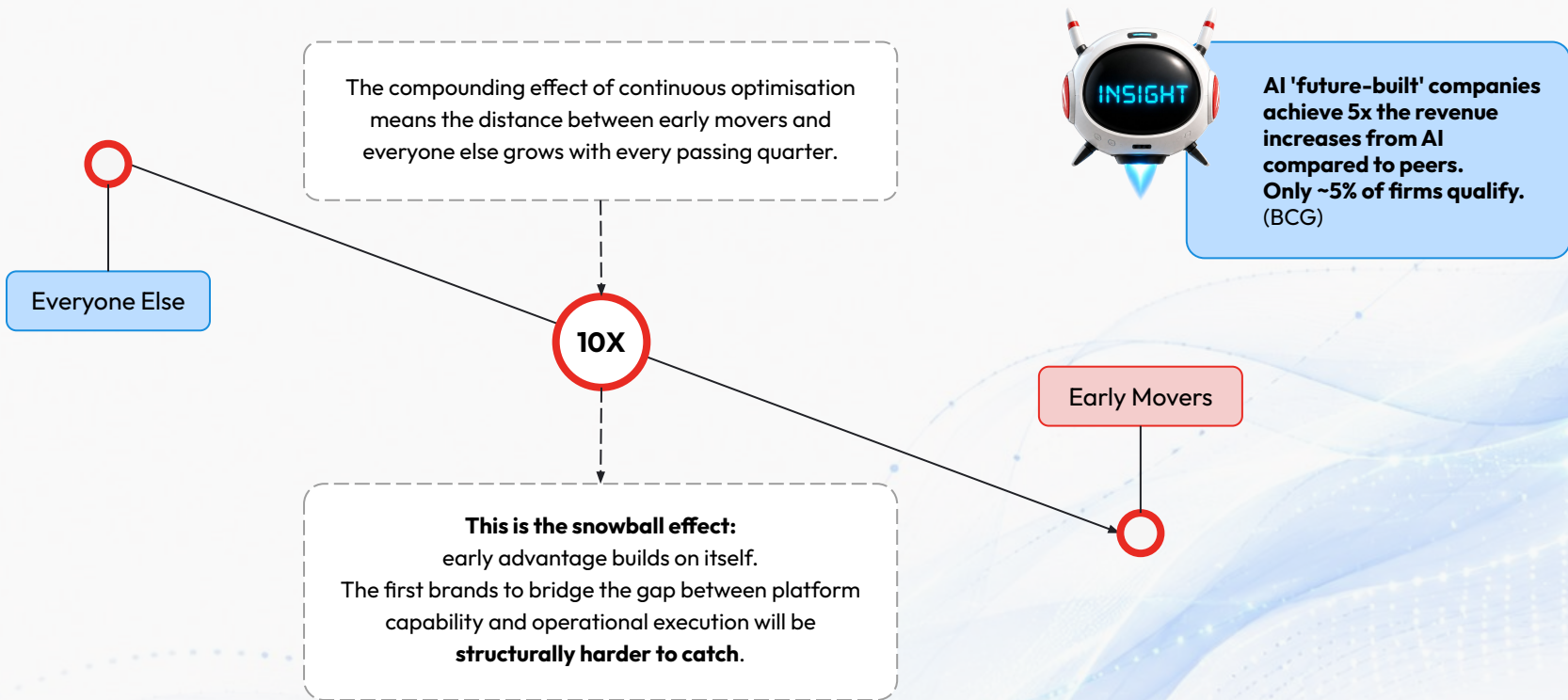
One bad experience, one irrelevant offer, one missed moment, **and customers move on.**



QSR loyalty transactions surged 28% in 2025.
(Paytronix / QSR Web)

The 10X gap that becomes permanent

A brand that runs 10X more experiments learns 10X faster





The compounding effect is what makes the timing argument real. Every campaign an agentic system runs generates data, and that data sharpens the next decision. But the loop only compounds if you know what to do with what it's telling you. Data tells you what happened. It still takes human judgment to understand why, and to decide what to do about it.

That's the real advantage of starting now. The brands beginning this work aren't just getting ahead on volume. Cycle after cycle, they're building a genuine understanding of their customers - a system that surfaces the patterns and a team that knows what they mean. A brand that starts twelve months from now isn't just twelve months behind on output. It's twelve months behind on understanding. And that's the gap that's hard to close.

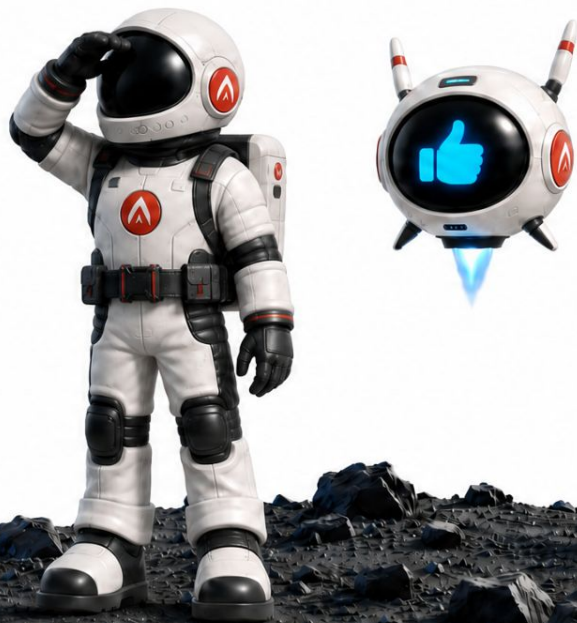
That's what we mean by accumulated intelligence. It's not about sending more, or sending faster. It's about understanding people better, every single cycle.

Lorna Argeñal

Senior CRM Team Lead, Massive Rocket

True **customer** centrality

The beliefs underneath the method.
First articulated by Lorna Argeñal.



The six principles

Lorna's approach to customer centricity

01

Customer behaviour is a signal, not an answer.

Data tells you what happened. It never tells you why.

02

Customer data is not customer reality.

You learn more in a thirty-minute store visit than in a month of engagement data.

03

Understand before you communicate.

Start with the customer's problem.
Work back to the campaign.

04

Technology should increase our ability to understand customers, not just our ability to message them.

05

The future of CRM is better decisions, not more campaigns.

06

Test what matters, even when the outcome is uncertain.

A programme that only runs safe bets will never find the breakthroughs.

The **Five Step Method**

A loop, not a funnel.

Every step feeds the next.

The last steps feeds back to the first.



The five steps

Turning your database into a compounding growth engine

This is the method behind more than two hundred CRM implementations for some of the largest brands in the world. It works because each step builds the foundation for the next, and the loop means the programme improves with every cycle.

The loop is the growth engine. Show The Money feeds straight back into Fix The Data for the next cycle. The programme starts to improve itself between human reviews. Incremental revenue compounds without a matching rise in effort.



Fix the data

Not 'audit'. Not 'discovery'. Fix. You fix as you learn.

Start with the goals, not the technical layer. What is this business trying to achieve and what is stopping it? Without that context, you cannot know which data matters and which is noise. Every data point has a cost. There has to be a business case behind every single one.

Then the architecture: data sources and destinations, how customer data flows, and where it breaks. Then user identity: can you resolve every customer into a single view? Duplicate profiles are the quiet destroyer of customer value. Then chip away: SDK, event quality, naming conventions, attribute hygiene, and a control group installed from the first week.

What it Delivers

Clean data earns you the right to interpret it. Real-time event routing makes same-day triggers possible. The control group becomes an automatic feedback signal the AI can optimise toward.



In practice:

A global QSR brand running a hybrid app and web setup was quietly generating more than eighteen thousand duplicate profiles, double-counting sessions and purchases for months, until the architecture was unified.

Fix the reports

Separate from data. Different failure mode. Different owner.

Bad data means your events are wrong. Bad reports mean your goals are wrong, your attribution is wrong, or your numbers will not survive five minutes with Finance. How are we going to measure success? What does success look like? Are we measuring it accurately? What is the current benchmark?

You do not need perfection. In the absence of fully accurate methods, you can infer revenue with reasonable assumptions. But you need to think deeply about how you report on impact before you do anything else. This is where the real measurement system gets built: control groups, attribution windows, the KPI framework, the source of truth - before campaigns run, not after.

What it Delivers

A measurement system that survives a CFO conversation. The control group becomes a permanent experimental apparatus. The AI gets a clean causal signal instead of last-touch or open rate, which is what makes real learning possible.



In practice:

A programme was reporting revenue more than three times higher than the real figure because the control group had been applied incorrectly. Corrected so the true incremental number could stand up in front of a CFO.

Plan campaigns that make money

The roadmap exists to generate commercial outcomes, not activity

If we cannot articulate how a campaign moves a revenue or retention metric, it should not be on the roadmap. Left alone, CRM collapses back into business as usual: a calendar of seasonal sends planned business-first instead of customer-first. The Valentine's Day campaign is easy to approve. The lifecycle programme that lifts frequency across the base is worth ten of those sends.

Size the prize before you execute. Look at all proposed initiatives and get an honest idea of their potential impact. Do they add up to the goals? If not, the plan is wrong. The roadmap is missing something critical, and that something may not even be CRM work.

What it Delivers

A lifecycle architecture built backwards from the customer's problem. Behaviour determines the branch, not the calendar. Every item on the roadmap traceable to a customer behaviour you are trying to move.



In practice:

A brand with four million customers who had bought exactly once and never returned, with no journey built for any of them. The single biggest opportunity in the business, sitting untouched until the full lifecycle architecture was built.

Run the campaigns

A loop, not a launch.

Brief, build, QA, deploy, monitor, optimise, repeat.



AI-powered personalisation increases marketing revenue by 6-10% on average.
(McKinsey)

BAU campaigns eat the lion's share of effort. They are throwaway: they do not compound or accumulate. The real value comes from lifecycle marketing that runs continuously. Automate as much BAU as possible to free up capacity for the lifecycle programmes that deliver compounding value.

The agentic progression: review your processes, delete steps that are not necessary, start scaling, then automate. Not first. Fourth. Automation applied to a bloated process just makes the bloat faster. Simplify, simplify, simplify.

What it Delivers

Programmes run; humans govern the system, not individual sends. The test library becomes the system's memory. Every campaign generates insight that improves the next one.



In practice:

A weekly production machine generating close to four hundred thousand dollars of incremental revenue per week, measured against a global control group. Gamification turned into automated, self-running journeys - one content format went from a fraction of CRM revenue to nearly half in a few months, without anyone writing a new brief.

Show the money

Proof. Not a report. Not a wrap up.

Revenue uplift against a control group, retention improvement, purchase frequency change - the numbers a CFO actually cares about.

Kill what is not working. Review what worked and what did not. Stop what did not work. Actively stop it. Not pause, not deprioritise - just stop.

Double down on what is working. When you find something that works, stop spreading effort evenly across ten initiatives and go big on the one that matters. You have found scale. Use it.

What it Delivers

Show The Money feeds straight back into Fix The Data and Fix The Reports for the next cycle. Models update on new data, underperformers get suppressed automatically, and the programme pursues the goal rather than the calendar. This is the growth engine you already own. You just needed to wire it correctly.



Where every client starts

The starting state is almost identical everywhere.
That's what makes it diagnostic.

01 An anonymous majority.

Every client has a large share of users they cannot contact. The database looks enormous. The contactable audience is a fraction of it.

02 Capable infrastructure, barely used.

The platform is in place and running at a fraction of what it can do. Predictive features, control groups, connected content, all switched off.

03 Measurement that misleads.

Numbers that do not reflect reality. Most commonly, last-touch revenue crediting the programme for purchases it did not cause.

04 Partial lifecycle coverage.

A welcome here, an abandoned basket there, everything else ad hoc and promotional. The structured journeys are missing.

The question:

Do you know exactly where you are, and are you focused on the right next step?

What separates the reality from a demo

If a vendor can't explain how they deliver all four in production, they're selling a demo.

03

Version control.

Every agent output is documented and reversible. You can see what the agent did, why it did it, and roll it back.

02

Security and audit trails.

Full monitoring on every action, every decision. Your compliance team can review what happened and when.

03

Guardrails.

Agents operate within defined boundaries. No surprises. No rogue campaigns. No brand risk.

04

Self-improving intelligence.

The system gets smarter with every campaign, every interaction, every outcome. The more you use it, the better it gets, and the harder it becomes for competitors to replicate.



45% of martech leaders say their vendors' AI agent capabilities fall short of expectations. (Gartner)

The path forward

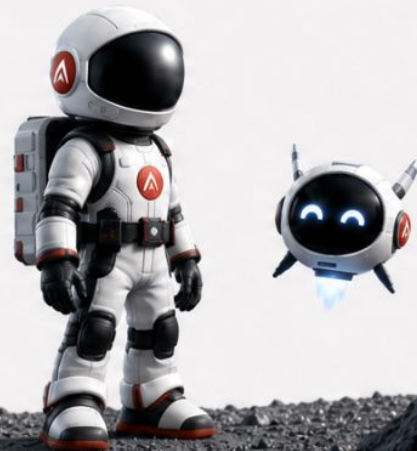
Your next steps

Assess where you actually are. Most organisations overestimate their readiness and underestimate their gaps. A proper diagnostic gives you precision - which of the five steps needs attention first.

Identify your highest-value bottleneck. Growth is rarely limited by budget or ambition. But by a specific constraint: a data gap, a measurement blind spot, a process that hasn't scaled. Find it, fix it, and the investment you've already made starts compounding.

Build the roadmap from your reality. Generic AI roadmaps are worthless. Yours needs to start from your current architecture, platform stack, team capability, and commercial priorities.

Move fast. Every quarter you wait is a quarter your competitors might use to get ahead. The five-step loop means you start generating value from the first cycle, and each cycle builds on the last.



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