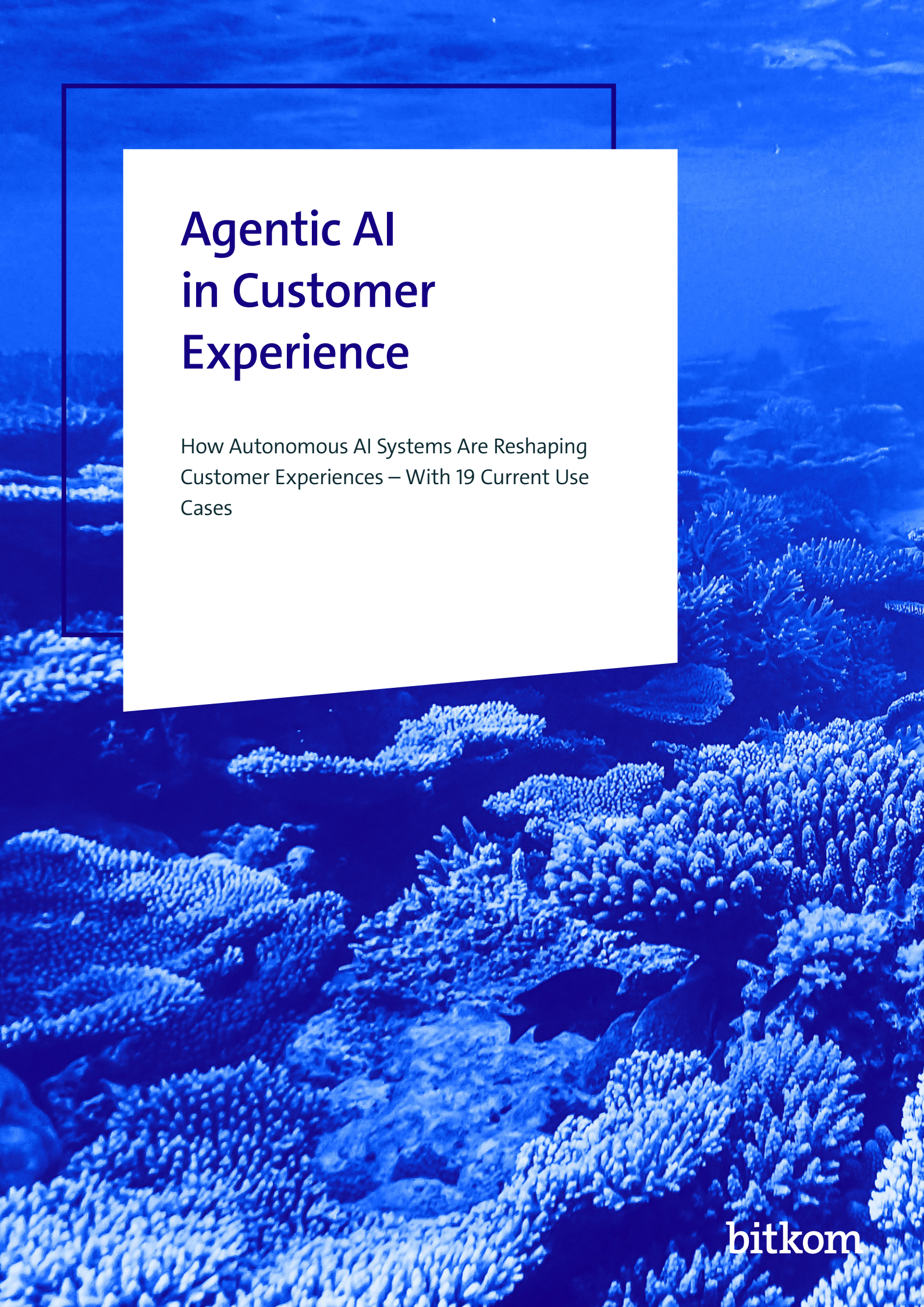
# Agentic AI in Customer Experience

How Autonomous AI Systems Are Reshaping Customer Experiences – With 19 Current Use Cases



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# Content

# 1 Introduction to the Publication – Agentic AI in Customer Experience

Customer experiences are now a key competitive factor. Expectations regarding speed, relevance and personalisation are constantly rising across all industries. At the same time, companies are faced with the challenge of consistently designing increasingly complex customer interactions across numerous channels, systems and touchpoints. Artificial intelligence is playing an increasingly important role in this. Agentic AI is currently developing a new generation of AI systems that can not only analyse and react, but also plan, decide and act independently. This shifts the focus from selective automation to intelligent, context-aware and adaptive systems across the entire customer experience.

This paper focuses exactly on that shift. It examines how Agentic AI can reshape customer-centric processes—from the underlying data layer to the concrete interaction—and which conditions must be in place so that technical capabilities translate into trust, transparency and lasting value. Especially in customer-facing contexts, the key issue is not only what can be automated, but how autonomous systems can be deployed responsibly. How can decisions remain understandable and auditable? Where does meaningful human oversight remain necessary? And how must data structures, organisational setups and skills evolve so that Agentic AI can realise its full potential?

The guide was developed as a joint initiative of several Bitkom working groups, including AI, CRM, Digital Marketing, Sales, Digital User Experience & Design, and Market Intelligence. The aim was to make the topic of Agentic AI in customer experience—from data to trust—tangible in a comprehensive way: analytically grounded, practice-oriented, and reflecting different stages of the customer journey. Each working group contributed its specific expertise, ranging from data-driven insight systems and autonomous marketing and sales processes to CRM structures and adaptive, experience-focused user interactions.

The result is not simply a collection of individual contributions, but an integrated perspective on the future of customer experience. The guide illustrates how Agentic AI unfolds its impact across organisational boundaries, how roles and responsibilities evolve, and why the interplay of technology, data quality, governance and human judgment is critical. Numerous practical examples and use cases from different industries complement this perspective with real-world experience, measurable outcomes and concrete lessons from implementation.

Agentic AI continues to evolve rapidly—technologically, organisationally and from a regulatory standpoint. Bitkom therefore provides a platform for ongoing exchange, enabling stakeholders to regularly share new insights, use cases and best practices related to Agentic AI.

# 2 The Development of Agentic AI – From Reactive Systems to Autonomous Action

Artificial intelligence is currently undergoing a phase of profound transformation. While early AI applications were largely limited to clearly defined, individual tasks, a new class of intelligent systems is emerging with **Agentic AI**—systems that are not only capable of responding to inputs but can also plan, decide and act independently. This development represents a qualitative leap toward autonomous, goal-oriented AI systems that increasingly influence entire processes and value chains.

## 2.1 Technological Foundations: From Language Models to Actionable Agents

The foundation of this development lies in the rapid advancement of modern AI architectures. In particular, the transition from traditional neural networks to transformer models and large language models (LLMs) has enabled systems to understand complex contexts, connect knowledge and perform multi-step reasoning. Today, these models form the "cognitive core" of modern AI systems.

On their own, however, such models remain passive: they generate text, classifications or predictions in response to a prompt. Their full potential unfolds only when they are embedded in agent architectures. In these architectures, language models are combined with mechanisms for planning, tool use, memory and feedback. This creates systems that do not merely answer questions but actively pursue tasks—for example by gathering information, preparing decisions, triggering actions and evaluating outcomes.

## 2.2 Definition: What is Agentic AI?

Agentic AI refers to AI systems that operate as autonomous agents: they pursue goals independently, perceive their environment, make decisions and execute actions, while continuously adapting their behaviour based on feedback.

A key distinction from traditional AI applications is that Agentic AI is not limited to isolated functions. Instead, it integrates perception, reasoning, action and learning into a continuous feedback loop. In many cases, multi-agent systems are used, in which several specialised agents collaborate in a coordinated way to address complex tasks.

Agentic AI is charcterised in particular by:

- **Autonomy:** Decisions are made within defined guidelines without permanent human supervision.
- **Goal orientation:** Agents act with clearly defined objectives rather than merely reacting to inputs.
- **Adaptability:** The system adjusts to changing contexts and improves based on outcomes.
- **Tool and system access:** Agents can interact with APIs, databases, and specialized applications to complete tasks.

## 2.3 Stages of Evolution: From Automation to Autonomy

The development towards Agentic AI can be described as a multi-stage maturity process. Initially, rule-based systems and Robotic Process Automation (RPA) dominated. These systems executed clearly defined processes according to fixed if-then logic. They were efficient but inflexible and lacked decision-making capability.

In a second phase, AI-based assistance systems emerged, particularly chatbots based on language models. They could understand natural language, summarise information, and support simple tasks, but operated largely in a reactive manner.

Agentic AI now marks the next stage: AI systems independently generate action plans, prioritise steps, select appropriate tools, and execute actions autonomously. Methods such as chain-of-thought reasoning or planning approaches are used to break down complex tasks into traceable sub-steps. At the same time, human-in-the-loop and AI-in-the-loop concepts enable controlled development and improvement during ongoing operation.

## 2.4 Distinguishing Agentic AI from Traditional Process Automation

A common misconception is to equate Agentic AI with “intelligent process automation.” While the two approaches overlap in practice, their underlying principles differ significantly.

Traditional process automation (such as RPA or rule-based workflows) strictly follows predefined processes. Decisions are modelled in advance, and exceptions must be explicitly anticipated. Such systems are stable but have limited adaptability.

Agentic AI, by contrast, is **goal-oriented rather than rule-oriented**. The agent is given an objective and determines situationally which steps are required to achieve it. It weighs alternatives, uses different data sources, and can pursue new paths when unexpected situations arise. In this sense, its mode of operation resembles human work more than mechanical task execution. The

key factor is not full autonomy, but the ability to act independently within clearly defined boundaries and to distribute responsibility meaningfully between humans and machines.

## 2.5 Relevance for Companies and Organisations

Agentic AI is increasingly understood as a strategic lever—not only for improving efficiency, but also for redesigning processes, roles, and decision-making structures. Studies and practical experience point to significant productivity gains, accelerated decision-making processes, and measurable effects on revenue and customer satisfaction. At the same time, requirements for architecture, data quality, governance, and compliance are rising considerably.

In particular, enterprise architecture management, well-structured data models, and transparent control mechanisms are becoming critical success factors. Agentic AI only realises its full potential where organisations are prepared to combine technological autonomy with clear guardrails, defined responsibilities, and human judgement.

## 2.6 Classification and Outlook

Agentic AI is neither a short-term hype nor a complete replacement for human work. Rather, it is evolving into a **cooperative system** that relieves people of operational routines and enables them to focus on evaluation, contextualisation, and strategic decision-making. The coming years will show in which areas autonomous agents create lasting value and where deliberate limits will remain necessary.

What is already clear, however, is that Agentic AI shifts the focus from automating individual tasks to **orchestrating intelligent, adaptive systems**. In doing so, AI becomes an active co-designer of processes for the first time—rather than merely a digital tool used within them.

# 3 Agentic AI in Business Functions

## How five perspectives jointly shape the customer experience of the future

Agentic AI is transforming not only technologies but also the ways entire organisations work. Today, customer experiences no longer emerge in isolation within individual teams; they result from the interplay of insights, communication, interaction, relationship management, and user experience. For this reason, within the context of customer experience, Agentic AI is not merely an IT topic—it is **a cross-departmental transformation field**. This transformation rests on two core elements:

1. **The evolution from data silos to an agent-ready data infrastructure**, in which marketing agents have read and write access to consolidated customer data. Agents identify friction points in the user journey and not only suggest corrections but also implement technical adjustments or content changes directly within closed feedback loops.
2. **The establishment of «human-in-the-loop" interfaces:** Where is human approval required (e.g. for budget increases above a certain threshold or for sensitive brand messaging), and where can the agent act fully autonomously?

The sequence of the following chapters follows the logic of an integrated customer experience process:

- **Market Intelligence** identifies opportunities, patterns, and signals that agents require as a basis for decision-making.
- **Digital Marketing** activates target audiences, orchestrates autonomous chains of measures, and manages the first point of contact between brand and customer.
- **Sales** translates intentions into concrete interactions and benefits from agents that consolidate, prioritise, and prepare information.
- **CRM** forms the operational core of long-term relationships and establishes the guardrails within which agents can operate across channels.
- **Digital User Experience and Design** ensures that customers actually experience Agentic AI—through adaptive, continuously learning interfaces and journeys.

Together, these five perspectives illustrate how Agentic AI not only optimises individual processes but also creates the foundation for a **coherent, autonomously supported customer experience.** Each department makes an indispensable contribution—and only through their interaction does Agentic AI unfold its full impact.

# 3.1 Market Intelligence – From Static Analysis to Autonomous Insight Systems

## Relevance and Transformation

For a long time, market intelligence was characterised by cyclical reports and retrospective analyses. With the emergence of Agentic AI, the focus is shifting towards continuous, autonomous insight systems.

Today, AI systems scan vast volumes of data almost in real time, linking research data with news, social media, market, customer, and competitive information to generate early signals for opportunities, risks, and areas of innovation. As a result, the importance of market intelligence at the executive level is increasing: it is evolving from an occasional, primarily retrospective analysis function into a continuous decision support system that provides scenarios, forecasts, and actionable recommendations.

## Practical Observations and Challenges

Many organisations are currently building their first agent landscapes that automatically analyse and cluster data—such as product reviews, social media feeds, pricing information, tender announcements, or customer experience feedback—deep into the data warehouse. Particularly valuable are agents that:

- detect weak signals indicating shifts in demand at an early stage,
- connect competitive movements with changes in customer behaviour, and
- automatically match market and environmental trends with existing segments, personas, and even specific customer profiles.

At the same time, practical experience shows that without well-structured data models, clearly defined research questions, and established handover points to marketing, sales, and product development, much of the potential remains untapped.

Poor data quality, bias, and a lack of contextual understanding can distort AI-based insights and lead to misguided decisions. In addition, organisations must address data protection and compliance requirements. As a result, companies need to develop capabilities in data governance, model validation, and insight interpretation.

## Role and Future Outlook

Looking ahead, an augmentation model is emerging for market intelligence departments: AI takes over volumetric scanning, pattern recognition, and initial synthesis, while humans focus on hypothesis generation, storytelling, stakeholder management, and strategic decision-making. Market intelligence professionals and teams are evolving into curating intelligence hubs that maintain AI-supported ecosystems, take

responsibility for predictive use cases, and feed insights into planning, innovation, and sales almost in real time.

Conclusion: AI agents provide continuous signals and patterns, while relevance assessment, prioritisation, and strategic interpretation remain core human responsibilities. The real value emerges from the interplay between the two—where technological speed meets professional judgement.

KI = Scale, Speed, and Early Signals

Humans = Context, Evaluation, and Decision-Making

## 3.2 Digital Marketing – From Campaign Planning to Autonomous Action Chains

### Relevance and Transformation

Digital marketing is emerging as a pioneering field for Agentic AI, as it features the highest density of digital signals and interfaces. While traditional marketing automation follows rigid if-then logic, Agentic AI is characterised by goal-oriented operational autonomy. Agents no longer merely execute predefined actions—they make operational decisions themselves: selecting channels, allocating budgets, and autonomously adapting messages to achieve defined KPI targets. The role of marketers is therefore changing fundamentally: away from the position of tool operator and towards that of strategist and curator, defining objectives, brand guardrails, and the scope within which agents can act.

### Practical Observations and Challenges

In practice, Agentic AI demonstrates its strengths particularly where complexity and speed exceed human capacity:

- **Real-time hyper-personalisation:** Agents identify “segments of one” and generate contextually relevant content (text, image, video) that responds precisely to the user’s immediate intent.
- **Autonomous media optimisation:** Continuous reallocation of budgets and bidding strategies across platforms, based on predictive analytics rather than historical reports.
- **Closed-loop optimisation:** Agents immediately evaluate responses (engagement, conversion) and optimise the next interaction without manual intervention.

The challenge: the gain in agility requires a new form of brand governance. Without robust technical guardrails, companies risk brand dilution or hallucinated promises. In addition, Agentic AI forces organisations to break down data silos: a marketing agent is only as effective as its access to consolidated data from CRM and market intelligence.

### Role and Future Outlook

Strategically, Agentic AI opens the opportunity to move from campaign-based thinking to continuous, **agent-driven demand and experience management**. Digital marketing teams are increasingly becoming architects of the customer experience: they define objectives, target spaces, brand guardrails, and decision logics within which agents are allowed to act autonomously.
The future vision is that of an **interoperable marketing organisation**. Agents exchange information across departments—they incorporate signals on competitor activities from market intelligence, use buyer personas from CRM systems, and seamlessly pass qualified leads to sales. In this way, digital marketing becomes the engine of a coherent, autonomously supported customer experience that combines efficiency with maximum relevance.

## 3.3 Sales – From Lead Processes to Autonomous Sales Agents

### Relevance and Transformation

In sales, Agentic AI becomes particularly relevant wherever significant time is still spent on information gathering, coordination, and follow-up. AI agents can pre-qualify leads, consolidate information from CRM systems, emails, meetings, and product data repositories, and independently initiate the next sales actions—for example personalised proposal follow-ups, meeting suggestions, or internal tasks for involved colleagues. This relief is particularly noticeable in complex B2B sales environments with long sales cycles.

### Practical Observations and Challenges

Initial pilot projects show that sales organisations are testing Agentic AI particularly in the following areas:

- automated preparation and follow-up of meetings (summaries, open issues, to-dos),
- prioritisation of opportunities based on behavioural and usage data,
- proactive risk detection within sales pipelines (e.g. inactivity or stakeholder changes).

The greatest barrier to adoption is rarely the technology itself, but trust. Sales teams want to understand why an agent classifies an opportunity as critical or prioritises a particular lead. Transparent logic, simple control mechanisms, and human-in-the-loop processes are therefore key design principles.

### Role and Future Outlook

In the medium term, the role of sales will shift towards more relationship- and negotiation-oriented activities. Agents will take over most administrative and analytical tasks—from data reconciliation to the generation of proposals. What is crucial is that sales does not operate in isolation but is closely integrated with CRM, marketing, and market intelligence. Only when signals from all three areas converge within the sales agent can a consistent picture of the customer reality emerge and tangible value be created for customers in their interactions with the company.

AI is a powerful tool, but it is not a substitute for the human element in sales. In a world where customers can effortlessly retrieve information using AI, the role of the salesperson becomes more strategic: the focus now lies more than ever on building trust and genuine interpersonal relationships.

## 3.4 CRM – From Contact Management to Autonomous Relationship Processes

### Relevance and Transformation

CRM systems have traditionally formed the backbone of successful customer relationships. With the introduction of Agentic AI, however, they are evolving into active orchestrators of the customer experience. Instead of merely storing or analysing information, autonomous agents increasingly take on operational tasks: they interpret interactions in real time, identify patterns across channels, and independently derive prioritised follow-up actions. This fundamentally shifts the role of CRM—from a reactive data system to a learning, action-capable platform that continuously manages customer relationships.

However, introducing Agentic AI into CRM environments is demanding both technologically and organisationally. Alongside questions of governance and collaboration, architecture, context management, and the controlled action capability of autonomous agents are moving to the forefront.

### Practical Observations and Challenges

Many companies already have initial experience with AI in CRM but struggle to further develop these approaches towards agentic models. Practical experience shows that suitable entry points can be found particularly where CRM processes are already highly data-driven and repeatable—for example in churn prevention, the reactivation of inactive customers, or the prioritisation of service requests. In these scenarios, the

contribution of autonomous agents can be evaluated quickly and forms a robust foundation for further expansion. Successful approaches combine:

- predictive models, among other things to assess churn risks, customer potential, or escalation risks based on a consistent and reliable dataset (single source of truth),
- agentic decision logic that triggers context-dependent next best actions and initiates them across systems,
- clear communication rules across channels and touchpoints, tailored to B2C and B2B contexts.

Common stumbling blocks include inconsistent data structures, missing consent and governance models, as well as parallel logic across marketing, automation, and service systems. This is why standardised approaches to context integration—such as the Model Context Protocol (MCP)—are gaining importance.

### Role and Future Outlook

Looking ahead, CRM is evolving into the "control tower" for all customer experience activities: agents dynamically manage contact frequency, levels of personalisation, and channel selection, while CRM teams are responsible for guardrails, data quality, and governance. Collaboration with sales, service, marketing, and UX will become closer, as many decisions can only be made effectively through coordinated interaction. Companies that define standards early on will create the foundation for scalable Agentic AI ecosystems.

## 3.5 Digital User Experience and Design – From Static Journeys to Adaptive Experience Agents

### Relevance and Transformation

Digital user experience and design is the area where customers experience the impact of Agentic AI most directly. Instead of designing static journeys and interfaces, teams are increasingly working with "experience agents" that dynamically adapt interfaces and processes to context, behaviour, and intent. This ranges from adaptive navigation structures and context-sensitive microcopy to personalised conversational interfaces that continue to evolve in real time.

### Practical Observations and Challenges

Pilot projects show that Agentic AI creates particular impact in three areas:

- Continuous friction analysis: Agents autonomously detect where users abandon a process or hesitate.
- Generation and testing of interface variants based on design systems.
- Situational support—for example through embedded assistants that explain content, suggest next steps, or validate user inputs.

A prerequisite is a modular, well-documented design system that agents can interpret and recombine. Without this foundation, there is a risk of fragmented user experiences and inconsistencies in style and interaction.

## Role and Future Outlook

The role of UX and design teams is shifting away from solely creating towards a more curatorial and governance-oriented approach. They define principles, pattern libraries, interaction rules, and quality criteria within which agents are allowed to optimise independently. In close coordination with marketing, CRM, and product management, this creates an ecosystem in which customer experiences are no longer developed in release cycles but evolve through continuous, data- and agent-driven iteration. In the long term, experience agents will become the connecting element between brand promise, functional usage, and data-driven optimisation.

# 4 Use Cases

## #1 AI Agents Are Revolutionising Claims Management

AI Agents are accelerating claims management in the insurance sector, reducing costs and significantly improving customer satisfaction through automated processes.

### Initial Situation

At many insurance companies, claims handling is still characterised by manual, time-consuming processes, fragmented data sources, and a high susceptibility to errors. These costly and inefficient internal workflows increasingly collide with customers who expect fast and user-friendly digital solutions. To address this challenge, the insurance company in question decided to deploy AI Agents in order to automate processing, shorten turnaround times, and improve user satisfaction for both customers and claims handlers.

### Implementation

Within claims management, AI Agents were introduced to automate time-consuming manual processes and minimise sources of error. In practice, the agents take over entire workflow steps: they analyse and classify submitted documents, review photographs of damage, extract relevant information from text and image data, and validate identity documents.

Through the integration of a data fabric as a unified virtual data layer, the agents gain access to consolidated, quality-assured data from multiple sources, supporting reliable decision-making. The final decision always remains with the claims handler, who can review and trace every step performed by the agents.

Employees and end customers benefit from significantly accelerated processes, faster customer communication, and substantially reduced rework.

In addition, adaptable tools allow the flexible configuration of agents for specific claim types or verification procedures, enabling insurers to efficiently address individual customer requirements.

## Results

The deployment of AI agents in claims management significantly reduced processing times and sustainably improved customer satisfaction. Automation led to noticeable efficiency gains and lower operational costs:

- Key KPI – Processing time per claim: A 98 percent reduction in manual data entry resulted in a 50 percent decrease in overall processing time.
- Cost savings: Lower handling costs and faster case resolution increased revenue potential through customer service that is up to nine times faster.
- Scalability: The organisation can now accommodate 20 percent additional growth using existing operational capacity.

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|---|---|
| **Application Area** | Claims management in insurance |
| **Involved Departments** | CRM, User Experience & Design, Other (Claims Management) |
| **Implementation Effort** | Medium – adjustment of processes, moderate additional costs |
| **Technical Complexity** | Low – use of existing tools or AI functions (plug-and-play), as the existing system is already integrated via a data fabric |
| **Industry** | Insurance, primarily B2C |
| **Maturity Level / Time Horizon** | Short-term implementable (0-6 months) |
| **Strategic Value** | ▪ Increased efficiency<br>▪ Personalisation and improved customer experience<br>▪ Classification: UX improvements for both claims handlers and customers |

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# #2 Supercharging Customer Care with GenAI and Agentic AI

The solution enables faster and more efficient customer service while sustainably improving satisfaction among both customers and employees.

## Initial Situation

Eneco eMobility experienced rapid growth driven by increasing demand for electric vehicle charging points. As a result, both the volume and complexity of customer enquiries rose significantly. Existing customer service processes were no longer able to handle this scale efficiently: long processing times, high training requirements, and rising costs placed increasing pressure on the organisation. To maintain service quality while improving productivity and customer satisfaction, the company decided to introduce an AI-powered copilot agent that enables automation, intelligent support, and faster case resolution.

## Implementation

To efficiently handle the growing number of customer enquiries, an AI-powered copilot was integrated into the existing contact centre. Agents were provided with a tool that delivers relevant information from the CRM during conversations, automatically generates call summaries, and suggests relevant knowledge base articles. This eliminated manual follow-up work and lengthy search processes. Organisationally, the rollout began with a small pilot group that tested the functions and quality of the system and provided feedback. After just five weeks, the solution was gradually rolled out more broadly. Technically, the agent is based on Microsoft Dynamics 365 and uses generative AI to analyse content in real time and provide recommendations for action. The result: the processing time per case was reduced by almost half, onboarding new employees now takes only one hour, and customer satisfaction increased significantly, as agents can focus on the conversation rather than administrative tasks.

## Results

- Wrap-up time: 8 min → 4 min (50 percent reduction within 5 weeks)
- Training time: 4 hrs → 1 hr (75 percent less effort)
- Licence costs: Annual costs reduced by approximately 50 percent

| | |
|---|---|
| **Application Area** | Customer Service |
| **Involved Departments** | Marketing, Sales, CRM, User Experience |
| **Implementation Effort** | Low |
| **Technical Complexity** | Medium |
| **Industry** | B2C, Energy provider |
| **Maturity Level / Time Horizon** | Short-term (0-6 months) |
| **Strategic Value** | Efficiency gains |

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# #3 Customer Centricity: From Customer to Advocate with AI-Powered Business Process Automation

## How Agentic AI helps people feel understood—and strengthens long-term customer loyalty

### Initial Situation

Today, customers expect far more than the technically correct handling of their request. They want to feel that the organisation they interact with truly understands them: their context, their situation, and their next step. Companies that fail to convey this quickly become interchangeable—even when they offer strong products and fair prices.

In many mid-sized companies, the relevant information already exists—for example in CRM systems (contacts, history, interactions), ERP systems (commercial, product, and production-related data), CPQ systems (products, variants, pricing models), emails, support tickets, and many other sources.

Yet despite this wealth of data, customer requests are often still processed according to checklists, offers are created using standard templates, and signals from existing customer relationships are only used selectively. At the same time, many mid-sized companies lack the personnel resources or AI expertise needed to orchestrate data-driven customer experiences on their own.

The central challenge is therefore to use this wealth of data in a way that creates customer experiences that feel personal, coherent, and forward-looking—while at the same time relieving teams rather than burdening them with additional complexity.

### Implementation

CAS provides its customers with business process automation with AI nodes as a key building block: a workflow suite that connects sales, service, and downstream processes while integrating AI in a targeted way. Through the interaction of the respective solutions and components, autonomous, context-aware agents are created that can interpret requests, make decisions, initiate next steps, and provide targeted support to teams. The following steps illustrate possible examples and application scenarios.

Correctly classifying customer requests. Requests received via email, web forms, campaigns, or voice messages serve as the trigger for starting an automated workflow. The integrated Agentic AI node analyses the request based on defined characteristics that are approved for the agent, such as:

- Is it an initial contact or an existing customer?
- Is it a support issue?
- A request for an extension?
- Or a sales-related opportunity with potential?

To determine this, the AI can access selected company data, particularly in the CRM, including previous interactions, modules used, or service feedback. Depending on the classification, the workflow determines who should respond, when, and with what objective:

- Service case: automated ticket creation, identification of suitable solution articles, and direct sending of a proposed solution.
- Sales opportunity: qualification, assignment to the appropriate sales representative, and automatic sending of a meeting proposal to the interested party.
- Product configuration: in addition to scheduling a meeting, a configuration can be created fully automatically via CPQ and sent as a personalised offer.

In this way, a simple request becomes an intelligent, context-sensitive pathway—without manual sorting.

Successful customer centricity requires both: processes that run in an automated—and in many cases even autonomous—manner, and employees who are actively supported and guided in their work. The key is to strengthen the core tasks of each role so that people can operate effectively and without friction. In addition to the scenarios described, the system should automatically generate recommendations based on CRM data that do not appear generic, but are perceived as the clear and meaningful next step.

These include, among others:

- Comprehensive lead qualification and summaries of complex emails
- Preparation of sales conversations,
- Preparation and even automated sending of personalised emails,
- Text modules aligned with the company's tone of voice.

Sales teams only need to review the suggestions and add to them if necessary—allowing them to focus fully on the customer. Through enterprise-controlled Agentic AI, autonomous workflows remain firmly in the hands of the company. AI enhances these processes: it classifies, prioritises, and suggests actions, thereby shaping moments in which customers genuinely feel understood.

## Results

With AI-powered business process automation, the benchmark for success shifts. Not only do processes become faster—customer relationships also become more stable, more personal, and more emotionally anchored.

- Customers experience that the organisation understands their context and communicates in a way that connects seamlessly with their situation.
- Offers and recommendations appear less generic and more like a shared, meaningful next step.
- Teams spend less time sorting, searching, and maintaining data—and more time engaging directly with customers.
- Across the entire customer lifecycle, it becomes visible where support is needed and where enthusiasm and genuine fan relationships emerge.
- Mid-sized companies benefit without additional IT complexity through visual workflows, modular AI integration, and low-code automation.

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|---|---|
| **Application Area** | Sales, Service, and Customer Success Processes |
| **Involved Departments** | Sales, Service, Customer Success, Marketing, IT |
| **Implementation Effort** | Medium – integration into the existing CRM and process landscape |
| **Technical Complexity** | Medium – use of existing data and selectable AI services (e.g. Mistral, Gemini, ChatGPT) |
| **Industry** | Focus on B2B mid-sized companies, but also applicable to B2C organisations |
| **Maturity Level / Time Horizon** | Short- to medium-term (3-6 months) |
| **Strategic Value** | ▪ Higher customer satisfaction<br>▪ Stronger emotional customer loyalty<br>▪ Efficiency gains through intelligent automation<br>▪ Faster offers and improved lead qualification<br>▪ Improved customer experience through context-based Agentic AI interaction |

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# #4 From Prospect to Customer: Lead Qualification with Agentic AI

A copilot agent automatically pre-qualifies website leads, responds within seconds, and seamlessly passes evaluated enquiries to sales and marketing.

## Initial Situation

Many companies generate sufficient website leads but lose valuable opportunities due to slow response times and manual pre-qualification. Enquiries are collected via forms or email and then reviewed by sales with a delay, often without clear evaluation criteria. Potential customers receive no immediate feedback, sales teams work with incomplete information, and marketing can only use the data to a limited extent for customer journeys. To address these gaps in process, speed, and personalisation, an AI copilot agent was developed.

## Implementation

On the website, the prospect starts a digital assessment directly via a copilot agent. The agent guides the user through predefined evaluation categories in a dialogue-based format and systematically captures needs, maturity level, and potential.

The responses are automatically analysed, translated into a scoring model, and the prospect immediately receives a personalised email with their initial assessment result.

At the same time, the sales team is notified in Microsoft Teams with a compact yet detailed evaluation. All data—including responses, score, and contextual information—are automatically written into Microsoft Dynamics 365 Sales and Customer Insights Journeys.

This allows marketing and sales to continue working without media disruptions, initiate follow-up activities, and personalise customer journeys. Organisationally, clear criteria for “sales-ready” leads were defined and are now applied consistently and automatically.

## Results

- Up to 70 percent faster response time to new leads
- Automated pre-qualification reduces manual work
- Seamless integration with D365 Sales and Customer Insights (CI) Journeys
- Higher conversion rates through fast, personalised communication
- Direct analytics available via Copilot Studio

| | |
|---|---|
| **Application Area** | Lead Management & Lead Qualification |
| **Involved Departments** | Marketing, Sales, CRM, Marketing Automation, AI Experience Officer |
| **Implementation Effort** | Medium – adjustment of processes, moderate additional costs |
| **Technical Complexity** | Medium – integration into existing systems or APIs required |
| **Industry** | B2B |
| **Maturity Level / Time Horizon** | Short-term implementable (3-6 months) |
| **Strategic Value** | Efficiency gains: scalable lead qualification without additional resources in sales and marketing |

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# #5 AI Agents in Risk Management: New Paths for User Experience and Efficiency

How AI agents simplify complex B2B credit risk management and accelerate decision-making.

## Initial Situation

Digitalisation has significantly transformed credit risk management in B2B companies. Instead of manual assessments, data-driven and AI-supported systems now assist in evaluating credit risks and open up new possibilities for efficiency and transparency. AI agents in particular improve the user experience by making complex information accessible through natural language and supporting users without specialist expertise in their decision-making. They connect data sources, identify patterns, and deliver targeted answers—reducing complexity while increasing the relevance of information. Despite increasing automation, transparency, data quality, and human accountability remain key factors for reliable decisions.

## Implementation

A current example of the use of AI agents is the integration of an AI-powered chatbot into the risk management platform Panorama by CRIF. The aim was to reduce the complexity of using business credit reports and to improve the user experience. The chatbot enables users to query complex credit reports using natural language and receive context-based answers within seconds. Standardised prompts such as report summaries or traffic-light ratings make it easier to get started. In the background, relevant data sources are aggregated and compact analyses are generated. The result: time savings, greater transparency, and a significantly improved user experience.

The platform also combines all relevant checks—creditworthiness, KYC, and ESG—within a single interface. Complemented by current news and supported by the new AI chatbot, Panorama accompanies the entire analysis process—from answering individual questions to providing additional reports. Companies can therefore make well-founded decisions more quickly, reduce compliance efforts, and identify risks at an early stage.

## Results

For companies, the practical benefit is primarily time savings. Answers are available within seconds rather than minutes. Panorama also creates transparency through clear and traceable information. In addition, ad hoc analyses without media disruption enable companies to make well-informed decisions.

With this update, CRIF underlines its role as an innovation leader in the field of data-driven

solutions. By integrating state-of-the-art technologies such as AI-powered chatbots, CRIF sets new benchmarks for efficiency and usability and demonstrates how digital transformation in credit risk management can succeed.

| | |
|---|---|
| **Application Area** | Customer Analytics |
| **Involved Departments** | User Experience, Product Management, Marketing |
| **Implementation Effort** | Low – new roles; no major investments or change management required |
| **Technical Complexity** | Low – development of proprietary models or new infrastructure required |
| **Industry** | B2B – Financial Services |
| **Maturity Level / Time Horizon** | In use, go-to-market November 2025 |
| **Strategic Value** | Efficiency gains as well as personalisation and improved customer experience |

**Kerstin Valet**
Regional Director
Marketing &
Communications,
CRIF GmbH

# #6 Hallucination-Free and Legally Compliant AI Agents for Customer Communication

Hallucination-free AI agents enable secure, intelligent customer service without exposing companies to liability risks caused by incorrect statements.

## Initial Situation

Companies receive thousands of enquiries every day—via email, chat, portals, or phone. The majority of these are recurring issues.

Nevertheless, support staff still resolve many of these cases manually. This leads to overloaded teams, high costs, and long waiting times for customers.

At the same time, expectations are rising dramatically. Customers want immediate responses. Everything must be fast, personalised, and available around the clock. Above all, responses must be reliable in order to maintain customer trust and avoid potential liability claims. With AI agents, this can be achieved—provided they are hallucination-free, legally compliant, intelligent, and scalable. In addition, they not only handle communication but can also automatically trigger further processes in parallel.

## Implementation

An AI agent was developed that automatically recognises and processes recurring standard enquiries and is available around the clock. For users, this means that regardless of the contact channel—phone, email, or chat—they initially interact with an intelligent single point of contact that provides immediate, reliable responses or directly triggers the appropriate follow-up processes. The agent can fully handle routine requests independently or route more complex cases in a structured manner to the responsible departments. At the same time, it automatically creates a ticket for every request, ensuring that all steps are documented seamlessly and can be traced at any time.

As a result, waiting times are reduced, service teams are significantly relieved, and enquiries are handled faster, more consistently, and with full traceability.

## Results

Through the deployment of the AI agent, key service metrics were significantly improved and the scope of application was substantially expanded.

Key KPIs:

- Average availability: approx. 99 percent
- Average first-resolution rate: approx. 85 percent

Monetary or Time-Related Benefits:
Noticeable efficiency gains through shorter processing times, fewer escalations, and significant relief for service teams, with FTE savings depending on the specific project.

Scalability / Scope of Application:
Scalable through the gradual training of additional use cases; applicable across departments and industries, for example in the public sector, energy sector, customer support, financial services, IT service desks, and more.

| | |
|---|---|
| **Application Area** | IT Service, Citizen Services, Customer Service Employee Knowledge Support |
| **Involved Departments** | Depending on the project |
| **Implementation Effort** | Medium – adjustment of processes, moderate additional costs |
| **Technical Complexity** | Medium – integration into existing systems or APIs required |
| **Industry** | Cross-industry, B2B |
| **Maturity Level / Time Horizon** | Short-term implementable (0-6 months) |
| **Strategic Value** | Efficiency gains, cost reduction, data competence / knowledge development |

**Laura Schuppert**
Senior Vice President – Product I Marketing I Quality, evocenta GmbH

# #7 From Data Silos to Agentic AI – Clean Data as the Foundation of Customer Experience

Agentic AI can only act as effectively as the underlying customer data allows—data quality determines autonomy and impact.

## Initial Situation

Many companies operate with fragmented customer data landscapes: information is stored across CRM, ERP, email, or event systems—often redundantly, incompletely, and without a consistent structure.

For Agentic AI, which is intended to make autonomous decisions and act along the customer journey, this represents a significant obstacle.

Without consistent data, context, trust, and operational reliability are missing.

The challenge was therefore to transform these silos into a connected, high-quality data foundation on which autonomous AI agents can operate reliably and transparently.

## Implementation

The goal was to create a data foundation that provides Agentic AI systems with structured, interconnected, and error-resilient information.

To achieve this, customer data from various sources was harmonised, spelling variants were standardised, and duplicates were merged using semantic and phonetic rules.

The data was then prepared in a way that allows AI agents to access it in real time, recognise context, and derive actions—for example in campaign orchestration, lead prioritisation, or anomaly detection.

The approach combined rule-based data logic with AI-supported contextual analysis, thereby creating a transparent and auditable foundation for autonomous systems.

The key insight: Agentic AI does not require more complex models, but more reliable data—data quality is the true catalyst for intelligent, autonomous CX processes.

## Results

The harmonisation of customer data led to measurable improvements in marketing and CRM processes:

- Agentic systems were able to access nearly complete customer datasets and trigger actions autonomously.
- The number of redundant records decreased by 87 percent, while the effort required for manual corrections was reduced by half.
- At the same time, the precision of target group engagement and the speed of processes along the customer journey increased significantly.

Scalability / Scope of Application:
Applicable to all data-driven CX processes—particularly in marketing, CRM, sales, and service—as a preparatory stage for autonomous agents.

| | |
|---|---|
| **Application Area** | Campaign Management / Lead Management / Customer Data Integration |
| **Involved Departments** | Marketing, Sales, CRM, Market Intelligence |
| **Implementation Effort** | Medium – integration into existing systems and data models, moderate additional costs |
| **Technical Complexity** | Medium – combination of rule-based matching and AI-supported data validation |
| **Industry** | B2C and B2B – data-intensive customer interactions |
| **Maturity Level / Time Horizon** | Short-term implementable (0-6 months) |
| **Strategic Value** | ▪ Efficiency gains<br>▪ Personalisation and improved customer experience<br>▪ Data competence |

**Thilo Torkler**
CEO, exorbyte GmbH

# #8 AI-Agent-Based Short Ad Generation

AI agent-based generation of short video ads with audio to improve efficiency (time-to-value) and control within the creative production process.

## Initial Situation

Situation: The current short video creation process is inefficient and costly, takes several weeks, and cannot be flexibly targeted to different demographic groups.

Customer requirements:

- Integration with the existing product catalogue
- Iterative process to identify suitable messages and target demographics
- Character and scene consistency: creation of a sheet containing characters and settings
- Possibility for tuning and adjustments throughout the creation process

## Implementation

**1. Concept and Asset Phase**

- **Request:** The user requests a new marketing advertisement in 9:16 format.
- **Storyline draft:** An "agent" proposes a storyline and a style guideline.
- **Asset upload:** The user can upload their own files (asset sheets).
- **Variants:** The system determines whether product photos are used or not in order to define the narrative and visual style.

**2. Feedback Loop**

- The user reviews the generated storyline and asset sheet.
- There is an explicit option to **request changes**, after which the system regenerates the storyline until the user confirms it.

**3. Media Content Generation**

Once the storyline is finalised, the individual components are created:

- **Images:** The **image generator** produces storyboard images for each scene based on the asset sheet.
- **Video & Audio:** In a parallel process, the **video generator** creates clips from the images while the **audio generator** simultaneously produces the soundtrack and voice-over.

**4. Finalisation**

- **Preview:** The user receives a compilation of the video, audio, and voice-over for final confirmation.
- **Combination:** After confirmation, the **combiner** merges all elements into the final advertisement in 9:16 format.

**Delivery:** The finished video is delivered to the user.


## Results

- Cost reduction of more than 75 percent across the end-to-end short video production lifecycle.
- Time-to-value: 90 percent faster.
- Greater flexibility in targeting due to increased availability of creative assets.

| | |
|---|---|
| **Application Area** | Short-form ad creation for campaign management |
| **Involved Departments** | Marketing, Digital Sales, Creative Department |
| **Implementation Effort** | Medium – for proof of concept (few assets produced): lower to medium effort and feasible with existing teams |
| **Business as Usual (BAU) for Implementation into Established Company Processes** | High – change management for new processes recommended. Human-in-the-loop remains an important component in the agent-based asset creation process. |
| **Technical Complexity** | POC: Medium; BAU (Business as usual): High |
| **Industry** | Retail, Einzelhandel, DIY, Heimwerkerbedarf |
| **Maturity Level / Time Horizon** | POC: Short-term; BAU: Medium-term |
| **Strategic Value** | Efficiency gains, personalisation |

**Riz Syed**
Partner Lead for Transformational Solutions, Google

# #9 Scaling Sales Excellence and Strengthening Buyer Engagement with Agentic AI

Real-time AI agents transform sales signals into personalised, compliant buyer engagements—scalable across channels and markets.

## Initial Situation

Customer-facing teams struggled to deliver consistent and personalised buying experiences due to fragmented tools and a lack of contextual insights. Marketing and sales lacked the necessary transparency, leadership had limited visibility into success drivers, and at the same time the pressure to scale personalisation increased—without raising regulatory risks.

In Germany, 65 percent of GTM leaders report confidence in their execution, yet only 22 percent have reached advanced AI adoption. Data quality and governance are among the biggest challenges (30 percent according to the Dynata GTM Performance Gap Survey, 2025). This created an opportunity to integrate trusted, role-specific AI agents directly into daily workflows, closing the gap between insight and action.

## Implementation

The company introduced a system of role-based AI agents deeply embedded in existing sales, marketing, and enablement processes. The agents provide contextual recommendations in real time—for example relevant content suggestions, automated creation of digital engagement spaces, or situational coaching prompts. Importantly, everything happens seamlessly within the users' working environment—such as CRM systems, email, or collaboration tools—without friction.

In addition, governance mechanisms were implemented to ensure compliance and consistency. The agents operate on a unified and secure data architecture that links interactions, training data, and content usage. This approach addresses concerns about data quality and improves cross-functional alignment.

## Results

After nine months, the company recorded significant improvements in sales performance and buyer engagement:

- +20 percent more sellers achieved their targets
- +14 percent increase in average deal size
- +16 percent higher win rates

These results were enabled by changes in processes, embedded enablement practices, and the introduction of AI agents that reduced manual tasks, supported consistent execution, and enabled scalable personalisation—without increasing risk.

| | |
|---|---|
| **Application Area** | Customer Engagement, Sales Enablement, Buyer Experience Optimisation |
| **Involved Departments** | Sales, Marketing, Enablement, CRM |
| **Implementation Effort** | Medium – requires cross-functional process alignment, but low operational barriers due to native workflows |
| **Technical Complexity** | Medium – API-based integration into existing systems (CRM, content, analytics) without infrastructure replacement |
| **Industry** | Technology, Manufacturing, Financial Services – B2B |
| **Maturity Level / Time Horizon** | Short-term implementable (0-6 months) |
| **Strategic Value** | Efficiency gains, personalisation and improved customer experience, revenue growth, data competence and knowledge development |

**Alexandra Röver**
Head of Field & Event Marketing EMEA & ANZ,
Highspot GmbH

# #10 Avatar Greets, Informs, Guides, and Answers Visitor Questions

The avatar relieves staff, improves visitor orientation, and provides fast, reliable information in real time.

## Initial Situation

A company with a high volume of visitors and limited staff resources found that many guests required orientation and quick information about processes or available offerings. Manual support was time-consuming and resulted in waiting times as well as repeated questions. To improve service quality and relieve employees, the company decided to introduce an AI agent responsible for greeting visitors, providing information, and directing them accordingly.

At the SAP Experience Center in Munich-Garching, customers can learn about innovative solutions in the field of supply chains. In the lobby, visitors receive personalised information by asking the automated welcome agent from Lenovo questions in natural language.

## Implementation

At the Experience Center, a digital avatar from Lenovo was installed on a display that directly addresses visitors and interacts with them in natural language. The agent is based on an integrated language model (LLM) and answers questions in real time—for example regarding orientation, exhibition content, or available solutions.

In addition, products can be selected and ordered from a personalised offering if the language model has been configured accordingly. This concept can also be applied in other sectors, such as retail, the public sector, banking, and customer service.

Visitors no longer need to wait for available staff but can receive information immediately. This significantly relieves reception staff and improves the flow of information.

The introduction required technical integration, clear process definitions, and organisational coordination with on-site staff.

## Results

As part of an initial proof of concept, an innovative greeting solution was tested that significantly simplified visitor interaction and noticeably increased satisfaction. A quantitative evaluation is not yet possible; however, initial feedback shows a positive response and clear potential for scaling.

- Customer satisfaction increased significantly
- Reception staff were relieved through automated information and wayfinding
- Scalable for retail, banks, public institutions, sports venues, and more

| | |
|---|---|
| **Application Area** | Customer Service |
| **Involved Departments** | Marketing, Administration, CRM |
| **Implementation Effort** | Medium – adjustment of processes, moderate additional costs |
| **Technical Complexity** | High – installation of avatars, development of LLMs with possible questions and answers, provision of IT infrastructure with edge server components |
| **Industry** | IT Solutions |
| **Maturity Level / Time Horizon** | Short-term implementable |
| **Strategic Value** | Personalised customer experience |

**Irene Hopf**
Direktor SAP Center of Competence, Lenovo

**Christoph Steinhuber**
Manager Government Relations, Lenovo

# #11 Supply Chain Agent

An agent was implemented that consolidates various logistics applications and makes them available to users via Microsoft Teams chat—from centre-of-gravity models and allocation algorithms for assigning vehicles to trucks, ships, or trains, to process analysis tools and data analyses on logistics bottlenecks.

## Initial Situation

The project did not initially start as an agentic AI initiative but rather with three separate projects, for example the development of an algorithm to optimise the assignment of vehicles to trucks, ships, and trains.

The idea of an AI agent emerged when the client realised that LLMs can translate natural language into SQL queries, for example. The goal was to develop an AI agent with access to databases that could independently perform data analyses. The primary focus was on identifying logistics bottlenecks and tracking critical parts.

It quickly became clear that AI agents unlock their full potential particularly when they can leverage their orchestration capabilities. Therefore, the applications previously developed in separate projects were connected to a central AI agent. Some of these applications were equipped with their own specialised agents, to which the global AI agent can delegate tasks in a targeted manner.

## Implementation

The solution serves as the central access point for all intelligent logistics applications. The orchestrating “CEO agent” is directly integrated into Microsoft Teams, making it easily accessible to users. It can delegate tasks to internally developed agents, third-party agents, as well as process automation tools.

The responsible agents know exactly how to operate the individual applications. The CEO agent primarily performs the coordinating and overarching control function.

A user can submit a request to the CEO agent via Teams chat, for example: “What are the most common reasons for delays in the delivery of component XYZ?” The CEO agent recognises that this request must be assigned to the agent responsible for the process analysis application. This agent can simulate the corresponding query within the application and provide an answer, which the CEO agent then communicates to the user. Through integrations with the various front-end systems, the user can choose to view results in graphical form or—if required—switch directly to the respective

application to conduct further analyses independently. Alternatively, the user can simply ask the agent for additional information.

## Results

The greatest benefit of the agent system is that it makes applications and data analyses accessible to a group of users who previously had no access due to a lack of expertise. This not only enables data analysis professionals to quickly find answers to their questions but also significantly expands the number of users who can contribute to improving supply chain efficiency.

Further outcomes:

- Answers to complex supply chain data analysis questions in under 10 seconds
- Company-wide availability through simple integration into Microsoft Teams
- 80 percent reduction in idle capacity

| | |
|---|---|
| **Application Area** | Data Analysis, Logistics Management |
| **Involved Departments** | Market Intelligence, Logistics |
| **Implementation Effort** | Medium – additional costs for the customer due to external service providers responsible for implementation |
| **Technical Complexity** | Medium – agentic AI always requires integration with systems and APIs in order for agents to deliver value |
| **Industry** | B2C, B2B |
| **Maturity Level / Time Horizon** | Medium-term planned – developing the agent itself is not a major effort. The key challenge lies in the applications orchestrated by the agent, which must function reliably. |
| **Strategic Value** | Efficiency gains – faster and more widely accessible data analyses to strengthen supply chain resilience. |

**Markus Strittmatter**
Lead AI Automation,
Lufthansa Industry Solutions

# #12 Microsoft – Agentic Marketing Orchestrator for Real-Time Engagement Along the Customer Journey

An autonomous AI agent orchestrates personalised real-time marketing actions across events, channels, and social interactions—measurably increasing engagement and conversion.

## Initial Situation

Marketing and CRM teams faced the challenge of executing highly personalised real-time communication consistently across events, social media, and digital touchpoints. Although Customer Insights and Journeys provided extensive data, operational use remained fragmented: campaigns were manual, responses to user behaviour were too slow, social signals remained isolated, and event interactions could not be used in real time. As a result, engagement potential was lost, follow-ups were inconsistent, and operational effort increased significantly.

To increase speed, relevance, and precision in marketing, an agentic orchestrator was introduced that autonomously interprets signals, prioritises actions, and operates across channels.

## Implementation

The AI agent is directly embedded into Customer Journeys, Event Management, and social listening streams.

It analyses real-time signals such as website and app behaviour, event interactions (registration, session attendance, Q&A), reactions to journey mailings, and social media mentions. Based on defined objectives, the agent evaluates context, intent, and relevance and independently initiates appropriate actions.

Examples:

- Reacting to social signals by automatically classifying intent, sentiment, and topic, and triggering appropriate journeys, service cases, or community responses.
- Event Journey Autopilot: Identifies no-show risks, sends reminders, generates session recommendations, and automatically follows up after sessions with personalised calls to action (CTA).
- Cross-channel optimisation: Independently tests content, selects the most effective format, and switches between email, push notifications, SMS, or social messaging.

Organisationally, the agent acts as a “marketing co-orchestrator”: decisions remain transparent, can be overridden, and are fully traceable within the CRM system.

## Results

KPIs (before → after, 12 weeks):

- Response time to social mentions: >2 hours → <60 seconds
- Event-to-conversion rate: +28 percent through automated follow-up
- Journey variant effort: –70 percent through autonomous optimisation

Benefits:

- Approx. 450 working hours per year less manual effort
- +18 percent higher engagement rate in real-time journeys

Scalability:

Applicable to all marketing and CRM scenarios, expandable to sales, commerce, and service. Multi-agent setups (e.g. content agent, social agent, event agent) can be integrated in the short term.

| | |
|---|---|
| **Application Area** | Campaign Management, Lead Management, Customer Engagement, Event Experience, Social Media Interaction |
| **Implementation Effort** | Medium – process adjustments and setup of event signals, moderate additional costs |
| **Technical Complexity** | Medium – deeper integration with Dynamics CI, Social Insights, and event management APIs |
| **Industry** | Cross-industry; B2C & B2B |
| **Maturity Level / Time Horizon** | Short-term implementable (0-6 months) |
| **Strategic Value** | Efficiency gains, personalisation and improved customer experience, revenue growth, data competence, others |

**Christian Mainka**
Senior Partner Solution Architect, Microsoft

# #13 Marketing Content Tagging with AI Support in Data Asset Management Software

AI improves structure, searchability, versioning, and reuse of marketing assets, enabling faster processes, greater consistency, and better compliance.

## Initial Situation

The central marketing department identified the need to keep company-wide global assets—created by different marketing teams across the organisation—consistently up to date in line with regulatory and approval requirements. Content blocks such as Efficacy, Indication, and Safety are used to facilitate simpler and more consistent asset creation.

This also includes the regular updating of professional information (PI) to ensure that all globally used assets remain aligned with the latest regulatory approvals and safety requirements.

## Implementation

The initiative aims to improve the accuracy of metadata across different levels of granularity—from modular content elements to final assets—and to enable large-scale re-taxonomisation of legacy content. The selected solution must integrate seamlessly with Veeva, support AI-driven multilingual tagging, comply with GDPR requirements, and deliver measurable efficiency gains to provide the foundation for advanced content insights and personalisation strategies.

In addition, the solution should enable automated tagging across different formats, support the historical tagging of existing content, provide flexibly configurable taxonomies and rules, and meet the highest standards in security, compliance, and reporting.

## Results

- Share of tagged documents / number of documents intended for tagging → greater than 95 percent
- Time (and cost) savings through automated tagging: difference between manual and automated tagging → greater than 0
- Share of correct tags / total number of assigned tags → equal to or greater than 90 percent
- Share of documents with at least one correct tag / total number of tagged documents → equal to or greater than 90 percent

| | |
|---|---|
| **Application Area** | Customer Service, Campaign Management, Meeting Materials, Omnichannel Activities |
| **Involved Departments** | Sales, Marketing (Customer Experience & Content Operation), Medical |
| **Implementation Effort** | Medium – adjustment of processes, moderate additional costs, no training costs, external support with a high six-figure investment |
| **Technical Complexity** | Medium – integration into existing systems or APIs required |
| **Industry** | Lifescience & Pharma, MedTech (B2B) |
| **Maturity Level / Time Horizon** | Short-term implementable (0-6 months) |
| **Strategic Value** | ▪ Efficiency gains<br>▪ Improved data quality |

**Andreas Schmitt**
Senior Manager,
msg industry advisors

**Robert Gassmayr**
Manager,
msg industry advisors

# #14 CMS Website Chatbot for Customers and Users

Reducing the workload of user support while enabling customers and users to discuss website content and receive links to further information.

## Initial Situation

**From a long list of use cases to a concrete project:** As part of its AI initiative, the client had compiled a wide range of potential use cases. These were prioritised together using a structured methodology. The website chatbot was selected as the first implementation case because it offered clear benefits for users while presenting relatively low risk.

**Faster responses to simple questions as the main objective:** User support for the website was struggling with a high volume of emails from website users who were often dealing with simple uncertainties or could not locate relevant sources on the website.

**High demand for external support:** It became clear that the client had limited development capacity for a technical implementation. At the same time, there was strong interest in systematically building internal expertise in AI and actively learning during the implementation process.

## Implementation

The chatbot was developed as a fully functional prototype in Java and uses a RAG approach based on Azure OpenAI (GPT-4o-mini) and Azure AI Search. Website content is transferred into a semantic index through nightly harvesting of the CMS Content API, enabling user questions to be answered in a context-aware manner.

The bot itself is designed as an API and integrated into the frontend via a lightweight React widget, allowing sports fans to interact with it directly.

The project included the development of a functional prototype that largely corresponds to the later production version and can be easily transferred into the operational system. At the same time, a reusable AI toolkit was created for applications based on semantic search and natural language interaction.

Through close collaboration, knowledge transfer into the organisation was ensured and internal capabilities in AI systems were strengthened. In addition, the project served as a test run for the AI delivery model based on the AI TOM and reinforced the foundations for a scalable AI factory within the “Make” domain. In the future, this structure is intended to continuously implement a wide range of use cases.

## Results

Within just eight weeks, an MVP was developed that automatically answers frequent user questions and relieves the support team. The solution is based on a novel architecture that enables stakeholders across the organisation (IT, data protection, operations, etc.) to better understand similar solutions in the future and even develop them independently.

- KPI: Average response time reduced from several hours → seconds (pilot phase: 6 weeks)
- Benefit: Potential savings of more than 1,000 support hours per year, compared with operating costs of approximately €1,400 per month
- Scalability: Architecture designed as a reusable framework for additional fan services and other CMS-based platforms

| | |
|---|---|
| **Application Area** | Customer Service, User Experience |
| **Involved Departments** | Business Development, IT, Legal |
| **Implementation Effort** | Low – implementation possible with existing teams and budgets |
| **Technical Complexity** | Medium – integration into existing systems or APIs required |
| **Industry** | Sports |
| **Maturity Level / Time Horizon** | Short-term implementable (0-6 months) |
| **Strategic Value** | ▪ Efficiency gains<br>▪ Improved customer experience<br>▪ Knowledge development |

**Cosma Nouschirvan**
Senior Manager, PwC

**Markus Niebel**
Manager, PwC

# #15 AI-Driven Customer Experience: From Natural Conversations to Guided Solution Recommendations

An AI advisor that simplifies product discovery, supports decision-making, and significantly improves the customer experience.

## Initial Situation

When customers access a company website to explore commercial offerings, they expect structured and easy-to-understand information. However, they often encounter complex portfolios and descriptions overloaded with technical jargon.

Our use case involves a large catalogue of proprietary and partner products, each designed for specific business requirements but described in highly technical, internal language.

Traditional search tools provide users with too many undifferentiated results and do not take their context into account, making it difficult to identify the right solution. As a result, users feel overwhelmed, struggle to make informed decisions, and lose interest.

This has led to low conversion rates on the product search page and highlighted the need to significantly improve discoverability, orientation, and the overall user experience.

## Implementation

The AI agent provides a dialogue-based interface that helps users clarify their business requirements through natural conversations. It asks targeted questions in the user's business language and processes these inputs—such as industry, business process, and specific use case—to query a database of proprietary and partner products.

Using semantic search, it combines structured product data from multiple sources with the conversational context to identify the most relevant options and explain the rationale behind each recommendation.

If users are logged into their accounts, the agent can personalise suggestions based on available customer data—while fully complying with data protection and security requirements.

The solution currently operates as a single agent, but it is designed to evolve into a multi-agent setup by early 2026, supporting additional use cases such as creating a shopping cart in an e-commerce platform, generating a lead in the CRM system,

automating real-time price optimisation, and generating documents. Overall, it transforms product discovery into a guided, context-aware, and secure experience.

## Results

Key KPI (before → after + timeframe):

- The conversion rate from occasional visitor to engaged contact is expected to increase by 2.5 percent annually.

Monetary or time-related benefit (€ / year, percentage reduction in disruption):

- Up to €16 million in pipeline value (engaged contacts)
- 40 percent increase in processing efficiency for staff

Scalability / scope of application:

- The solution is intended to become the entry point for all chats on our website.

| | |
|---|---|
| **Application Area** | Lead Management, Customer Service, Digital Product Exploration |
| **Involved Departments** | Marketing, Sales, CRM, IT |
| **Implementation Effort** | High – new roles, larger investments, or change management required |
| **Technical Complexity** | Medium – integration into existing systems or APIs required |
| **Industry** | B2B |
| **Maturity Level / Time Horizon** | Short-term implementable (0-6 months) |
| **Strategic Value** | ▪ Solution already in use<br>▪ Medium-term expansion planned (6-18 months)<br>▪ Multi-agent framework to be implemented by early 2026<br>▪ Strategic benefit: personalisation and improved customer experience |

**Giacomo Gasperini**
Senior Director –
AI Experience for sap.com,
SAP SE

**Frank Maier**
Accenture Leadership,
Accenture

# #16 Reimagining CRM: An AI Platform for End-to-End Customer Relationships

ServiceNow CRM AI agents personalise interactions, optimise processes, and generate additional revenue. As a system of action, the platform forms the foundation for end-to-end customer relationships in the age of AI.

## Initial Situation

The company struggled with a fragmented application landscape **that had evolved over many years** (CRM, ERP, FSM, call centre, knowledge management, and service tools), which separated work into organisational silos. These systems were only loosely connected. Data was stored in individual systems and not synchronised. Employees had to **juggle isolated tools** and spend considerable time on **manual routine tasks** (e.g. summarising tickets or entering data), as their systems did not provide full access to the data required for their work.

## Implementation

The fragmented system landscape was consolidated into a unified platform—a "system of action." It seamlessly connects master data, ERP systems, and other applications, eliminating data silos and enabling end-to-end workflows across departments.

Employees are relieved of routine tasks through AI-driven automation. The platform removes the need to constantly switch between tools and provides all relevant data for value-creating customer solutions within a single interface.

End customers benefit from faster resolution times due to AI automation and the elimination of silos. Their experience becomes seamless and consistent across all channels. With proactive AI and full data access, customers receive hyper-personalised support that minimises their effort.

## Results

**First Contact Resolution (FCR): Increase of 15–25 percent** through AI-supported knowledge articles and autonomous issue resolution. The AI ensures that agents and end customers immediately receive the correct information. **Average Handling Time (AHT): Reduction of 20–40 percent** through automated summarisation of requests and the elimination of manual data entry. **Automation rate: 37 percent** of service requests can be resolved autonomously by AI (Now Assist) without requiring intervention from a human agent.

| | |
|---|---|
| **Application Area** | Customer Service / Cross- and Upselling |
| **Involved Departments** | Sales, Service, Fulfilment, Back Office, Controlling, Accounting |
| **Implementation Effort** | Medium – adjustment of processes, moderate additional costs |
| **Technical Complexity** | Medium – integration into existing systems or APIs required |
| **Industry** | IT Service (B2B / B2C) |
| **Maturity Level / Time Horizon** | Short-term implementable (0-6 months) |
| **Strategic Value** | ▪ Revenue growth<br>▪ Efficiency gains<br>▪ Personalisation and improved customer experience |

**Markus Siebert**
Director Sales CRM &
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# #17 Customer at the Centre – An AI-Based Approach to Real-Time Feedback

Our survey tool uses generative AI to simulate feedback from a representative sample of customers and optimise customer-centric decision-making.

## Initial Situation

In a dynamic market environment, companies increasingly face the challenge of responding quickly and effectively to changing customer needs. At Sky Deutschland, a large number of strategic decisions must regularly be made along the content lifecycle—from acquisition to promotion. To make the right choice for customers among many possible options, their feedback is essential.

Traditional surveys, however, often prove to be too expensive, cumbersome, and time-consuming. This is where the survey tool we developed comes in with an AI-based solution.

## Implementation

The tool is first connected to the internal customer database so that customer information and usage data can be accessed at any time. Via an input interface, the user submits a research question—in Sky's use case, for example, a question about the willingness to watch a specific piece of content (intention to watch). In the background, a representative sample is drawn from the database, taking all relevant customer attributes into account.

In an iterative process, prompts are automatically sent to a large language model and its responses are collected. In the application example, the prompt consists of a short summary of the film or series, followed by a description of the surveyed customer using attributes such as genre interest, usage frequency, and viewing habits. The result is simulated customer feedback that is presented to the user—for example in the form of a bar chart showing the share of customers interested in the content.

The survey tool therefore provides a fast, simple, and cost-effective way to evaluate alternative courses of action. It can be used across departments and supports data-driven decision-making.

## Results

- Cost reduction (a few cents per request instead of several thousand euros)
- Time savings (responses within minutes instead of several days)
- Reduction of misjudgements through early pre-selection of options
- Area of application: company-wide and continuously expandable

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| **Application Area** | Pre-testing of communication measures (content assets, wording, visual materials, etc.) |
| **Involved Departments** | Marketing, Merchandising, Communication (CRM), Market Research |
| **Implementation Effort** | Low – implementation possible with existing teams and budgets |
| **Technical Complexity** | Low – use of existing AI functions (plug & play) |
| **Industry** | Media and streaming industry, operating in B2C |
| **Maturity Level / Time Horizon** | Short-term implementable (0-6 months) |
| **Strategic Value** | Market testing, cost reduction, resource allocation, real-time feedback, content optimisation, customer centricity, decision support, target group analysis, efficiency gains, knowledge development |

**Roman Capalija**
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**Melissa Stiller**
Data Science,
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# #18 Statutory Accident Insurance and Chatbots: Challenging but Feasible

Providing a specialised chatbot with agents for individual subtasks makes it possible to improve customer support and deliver detailed, well-founded answers to specific questions in a user-friendly way (including references to further sources), while complying with the requirements of the EU AI Act.

## Initial Situation

The statutory accident insurance provider offers specialised information and seminars for its member companies and insured persons in order to improve occupational safety.

These resources are distributed across numerous sources that are not always easy to locate or read. A personal contact is not available 24/7. In such cases, an LLM-based assistant can leverage its core strengths: summarising and reformulating content and, if necessary, even translating it into languages that have not previously been provided.

Two particular challenges arise in this context:

- 1. Data from communication with an accident insurance provider may fall into high-risk categories.
  - Solution approach: secure on-premise deployment.
- 2. Users expect legally reliable statements.
  - Solution approach: rigorous quality assurance of response accuracy and a disclaimer at the beginning indicating that AI-generated responses cannot replace consultation with subject-matter experts.

## Implementation

The chatbot uses only content from the website of a single professional association as its knowledge base and primarily processes this approved and editorially prepared data.

In addition, an internal database is used in which implicit knowledge is specifically processed and regularly updated to prevent outdated or no longer relevant content, such as from old issues of PDF magazines, from leading to incorrect answers.

The solution is based on freely available open source models that are used with the help of a VRAG approach.

In order to meet the specific technical requirements and ensure legal compliance, the system is operated entirely onpremises and is subject to a complex, continuous content quality assurance process.

For on-premise operation, the use of the smallest possible model was evaluated. The solution is based on the Mistral Small Instruct (22B) model, which ensures that the requirements for natural language communication and content accuracy are met in the long term. The model is used "off the shelf" and is not specially trained, so that no re-training is necessary. The specific specialist knowledge is provided by ingestion pipelines from various sources.

In a process lasting several months, the error rate (answering irrelevant questions, incomplete answers to questions, hallucinations when answering questions) was reduced from an initial level of over 30 percent to less than 1 percent.

Optimisation was achieved on a technical level (improved document processing, system prompt tuning, guard railing and agent optimisation) as well as through improvements to the content of the source data, where gaps, contradictions and outdated information were identified during the bot's quality assurance process.

## Results

Over the course of a year, the quality of responses improved by

- around 300 test questions and content regression tests by the development team
- an additional test panel of 20 domain experts to evaluate the content of the answers
- a closed beta programme with around 30 end customers

continuously measured and targeted optimisations derived from this.

This reduced complaints about the bot from an initial >30 per cent to less than 2 percent.

A qualitative survey of end customers revealed a very positive assessment of the bot's response quality and performance.

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|---|---|
| **Field of application** | Customer service |
| **Departments involved** | Specialist departments, public relations, UX team, AI team |
| **Expense** | Medium |
| **Technical complexity** | Medium (OnPremise installation) |
| **Industry** | Statutory accident insurance (G2B) |
| **Maturity level / time horizon** | Short term: Following completion of the closed beta in 2025, the live launch is scheduled for Q1 2026 |
| **Strategic benefit** | ▪ increased efficiency (support)<br>▪ Customer experience: Support bottlenecks (times) are avoided |

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Managing Director
DataTechnology GmbH

**Ludwig Schreyer**
Managing Director
Port Sol 19 GmbH

**Dr. Ronald Hartwig**
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# #19 AI consultant assistance for fast, accurate educational counselling

AI agent PRODI supports specialist consultants in advising B2B and B2C customers more quickly and accurately on over 350 suitable educational programmes based on their individual circumstances.

## Ausgangssituation

Education consultants at WBS TRAINING currently use the internal product portal and other sources to find suitable courses using keywords and filters. Product information is available digitally, but cannot be queried directly. For each enquiry, content must be filtered manually, courses compared and emails formulated individually.

This takes a lot of time for each offer, leads to media breaks and makes it difficult to provide high-quality recommendations quickly, especially in complex cases. At the same time, customers increasingly expect to receive quick, transparent and individually tailored answers to their education and career questions during their initial contact.

## Implementation

The AI agent PRODI is provided as a digital co-pilot directly in the everyday work of consulting (e.g. in collaboration tools and, in the future, in CRM). Consultants ask their questions in natural language ("questions instead of searching") or use dynamically generated comparison or product tables. PRODI provides curated answers from product data, internal FAQs and other knowledge sources and can, if necessary, carry out brief research on special topics – such as professional qualifications acquired abroad.

An upstream anonymiser makes it possible to read even difficult-to-read documents and CVs, anonymise them in compliance with data protection regulations, and convert them into a standardised extract. Specialised agent patterns (e.g. for searching, matching, reasoning, text generation) work together under the hood. They enable complex product recommendations and reasoned responses across multiple sources, brands and products – including traceable reasoning for consultants.

## Results

The first pilots have already shown clear gains in efficiency and quality in consulting; detailed measurement is still ongoing.

- Information search: approximately 30 percent less time spent per enquiry thanks to targeted queries instead of portal navigation.
- Consultation time until the appropriate recommendation is made: approximately 20 percent shorter, especially in complex cases.
- Manual text work (emails, summaries) is reduced by 10-15 percent per week in the consulting team.

| | |
|---|---|
| **Field of application** | Lead management, individual educational counselling, self-service product advice on the website |
| **Departments involved** | Sales, product management, marketing, digital solutions & services |
| **Effort** | Medium – cross-functional project with process adjustments and moderate additional development and licensing costs |
| **Technical complexity** | Medium – integration of product portal, knowledge data sources, document processing and CRM via APIs; use of existing cloud AI services. |
| **Industry** | Educational services/further education, active in B2C and B2B |
| **Maturity level / time horizon** | NOTE: The solution is already in use! We will discuss the development time: Plannable in the medium term (6-18 months) – can be implemented in approximately 6-12 months with existing product database, CRM and in-house development expertise; currently in company-wide roll-out. |
| **Strategic benefits** | Increased efficiency; personalisation & customer experience; data expertise / knowledge building; medium-term contribution to higher conversion and revenue growth |

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**Robert Magiera**
Head of
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# 5 Authors

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Marcus Bär is a member of the executive management team at CAS Software AG and leads the company's XRM SmartCompanies, which operate in more than 40 countries. In addition to overseeing sales and partner management, he advises organisations on the implementation of CRM and XRM solutions and regularly speaks on topics such as sales enablement, CRM implementation, the further development of existing CRM systems, customer orientation, and customer centricity. At Bitkom e. V., he serves as Chair of the CRM Working Group and is also part of the leadership of the Steering Committee Business Software & Digital Office, where he advocates in particular for the interests of small and medium-sized enterprises.

## Roman Capalija, Vanessa Zellner, Melissa Stiller

The UI Alliance – consisting of Roman, Vanessa and Melissa – is a cross-functional collaboration between Content Merchandising and Data Science aimed at optimising consumption and engagement KPIs.

## Giacomo Gasperini

Giacomo Gasperini is a Senior Leader at SAP focused on AI- and automation-driven transformation, translating complex business challenges into clear strategies, disciplined execution, and measurable business outcomes.

## Robert Gassmayr

I support pharmaceutical and MedTech companies in digitalising their commercial processes and making their marketing operations more effective. My focus lies on customer engagement, omnichannel strategies, and the successful implementation of modern MarTech and CRM platforms. With many years of experience in commercial excellence, data integration, and process transformation, I help teams deliver their messages to healthcare professionals in a targeted way and make measurable use of technology. My work combines strategic thinking, hands-on implementation, and a strong focus on adoption, change management, and performance.

As a former competitive athlete, I also bring perseverance, clarity, and a strong sense of teamwork to every project.

## Dr. Ronald Hartwig

Dr. Ronald Hartwig is the founder and Managing Director of the consulting firm SW-Beratung untrouble and Chair of Bitkom's Working Group on Digital User Experience Design. As a computer scientist with a PhD specialising in human–computer interaction, he has been supporting companies in the areas of usability, user experience, and digital transformation for more than 25 years.

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Irene Hopf leads Lenovo's global Center of Competence for SAP solutions and is based in Walldorf. With more than 25 years of experience working with customers worldwide in the SAP ecosystem, she focuses on infrastructure solutions and the integration of hardware, software, and consulting.

## Dr. Marcus Hudec

Dr. Marcus Hudec is the founder and CEO of Data Technology in Vienna and an expert in artificial intelligence, advanced analytics, and machine learning. He has been advising organisations on data-driven innovation for more than 30 years and is a long-standing university professor of statistics and computer science.

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Digital Experience Architect with global expertise in transforming marketing and operating models through AI. Responsible for the Experience Services division, leading a team of more than 100 specialists who develop innovative products and services for international brands using CX, GenAI, and agentic technologies.

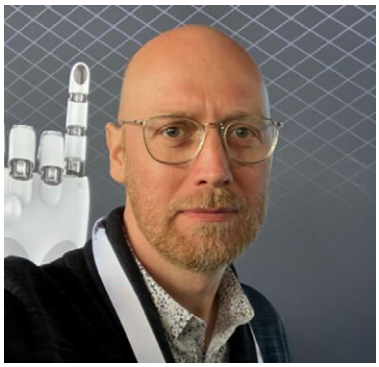
## Thilo Torkler

Thilo Torkler is Managing Director of exorbyte GmbH in Konstanz. His focus lies on explainable and energy-efficient data processes that enable the use of AI in regulated and data-intensive environments.

He advocates for transparent, auditable, and sovereign approaches to data integration as a foundation for agentic AI in customer experience and public administration processes.

## Thomas Lorenz

Thomas Lorenz holds a degree in business informatics and has extensive experience in solutions consulting and software delivery. He currently heads the Sales Solutions Consulting Team for Appian in Central Europe.



## Robert Magiera

Robert Magiera focuses on B2B customers and manages several teams responsible for customer acquisition. He defines and optimises sales processes. and is focused on digitalisation and automation of consulting services.

## Frank Maier

Frank Maier is Managing Director at Accenture Song. He has over 20 years of experience advising companies in the areas of marketing, sales and customer service. In his role, he helps companies create innovative customer experiences with the help of AI.

## Christian Mainka

Christian Mainka is a Senior Partner Solution Architect at Microsoft. He advises Microsoft partners and companies on solution development, introduction and implementation of Microsoft Dynamics 365. As a project manager in the solutions business, he advised companies on the introduction of CRM solutions and strategies. His current focus with Dynamics 365 and the Power Platform is on customer experience platforms, marketing automation and artificial intelligence. He sees himself less as a product consultant and more as an inspirer, idea generator and motivator/coach.

He actively interacts with his audience and inspires listeners with his lively presentations, which are highly practical, individual and creative.

## Michael Meyer

Michael Meyer is part of the AI Transformation team within the central division Digital Solutions & Services at WBS GRUPPE and is, among other things, responsible for the PRODI project. In this role, he drives the development of agentic AI solutions for consulting, learning, and internal knowledge work, as well as for self-service applications. He combines technological expertise with practical experience in sales and education advisory to develop AI solutions that integrate seamlessly into everyday work and create measurable value for both employees and customers.

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Markus Niebel is a Manager at PwC Germany in the field of IT Transformation/CIO Advisory, with a focus on AI-driven business models and modern technology architectures. He supports companies in R&D through design sprints for digital ecosystems, the implementation of data-driven value creation, and the development of AI and machine learning solutions within concrete minimum viable products and rapid prototyping initiatives under the concept of “strategy-to-code.”

## Cosma Nouschirvan

Cosma Nouschirvan is a Senior Manager at PwC Germany in the field of Customer Transformation. In this role, she supports companies in optimising their customer-facing operations and leads global marketing technology implementations and roll-outs.

Her focus areas include data strategy, reporting, and the development of marketing architectures. Cosma Nouschirvan is also an expert in the application of AI technologies and a member of the PwC AI Initiative.

## Alexandra Röver

Alexandra Röver is an experienced marketing and go-to-market leader with more than 15 years of expertise in the European tech and SaaS landscape.

She develops and scales high-impact demand and growth marketing strategies that measurably contribute to pipeline generation and revenue growth.

Her focus lies on successfully positioning brands, strengthening C-level engagement, and aligning global strategies with effective local execution. Through close collaboration with sales teams and customers, she creates relevant market experiences and sustainable business impact.

## Andreas Schmitt

With a PhD in chemistry and a strong scientific background, I bring more than two decades of experience in pharmaceutical and life sciences marketing. My professional career spans the full spectrum of marketing—from strategic brand management and product launches to portfolio management, digital communication, and patient education. In my current role as Senior Manager Commercial Excellence at msg industry advisors, I support life sciences companies with deep expertise in the development and implementation of effective marketing strategies. My work combines rigorous analysis, creative campaign development, and a pragmatic approach to execution—from the initial idea through to successful implementation.

## Ludwig Schreyer

Ludwig Schreyer is Managing Director of Portsol19 GmbH in Mainz, a provider of digital solutions. His areas of focus include healthcare, software development, and IT strategy.

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Laura Schuppert is Senior Vice President – Product | Marketing | Quality and a member of the management board at evocenta GmbH.

## Markus Siebert

Markus Siebert is an experienced expert at ServiceNow specialising in Customer Service Management. With extensive expertise and a strong track record in the implementation and optimisation of projects, he is distinguished by his ability to translate complex business requirements into effective service solutions.

## Christoph Steinhuber

Christoph Steinhuber is responsible for Lenovo's government and public sector relations in Germany.

## Markus Strittmatter

In my role as Lead AI Automation at Lufthansa Industry Solutions, my primary focus is on providing the right tools for each customer process to be automated and ensuring that this toolkit remains up to date and in optimal condition. The aim is to embed autonomous systems within a clear organisational and technical framework and to create sustainable value for customers.

## Riz Syed

Riz holds a degree in Business Administration (Diplom-Handelskaufmann) from Kiel University (Christian-Albrechts-Universität zu Kiel). In 2007, he founded a performance marketing agency specialising in paid media and digital analytics. After roles including a position at Adobe, where he was responsible for the sales of Marketing Cloud solutions, Riz joined Google in 2015 and has since worked in various roles focusing on media, AI, and technology. Since 2020, he has been collaborating with consultancies and system integrators to support Google clients in their digital transformation through customised AI solutions.

## Sven Weih

Sven Weih heads Product Management for digital configuration solutions at CAS Software AG and is responsible for advancing these solutions for the future. His work focuses on systems that reduce complexity, provide clear orientation, and meaningfully support decision-making.

In parallel, he leads the company's UX department. His focus lies on the targeted integration of AI—not as an end in itself, but as a means to solve concrete user problems and create real added value. The goal is to develop products that put people at the centre, support them effectively, and help them complete their tasks efficiently and to a high standard.

In addition, Sven Weih serves on the board of UIG e. V. (German Usability and User Experience Professionals Association) and advocates for the sustainable integration of usability and user-centred design within organisations.

## Florence Westphal

Florence Westphal is Co-Business Unit Lead at Cloudbridge and specialises in Marketing Automation, Microsoft Dynamics and data-driven MarTech projects.

She works with Microsoft Copilot on a daily basis, develops her own AI agents in Copilot Studio and automates complex marketing processes. With over six years of B2B IT experience, she combines technical depth with modern GenAI expertise.

## Kerstin Valet

Kerstin Valet, Regional Director of Marketing & Communications, has over 15 years of experience in B2B marketing. For four of those years, she was responsible for partner management for a real estate franchise system. Since 2013, she has been working for the information service provider CRIF. After setting up the marketing department at CRIF Austria, she moved to Germany in 2018, where she is responsible for strategic and operational marketing as well as internal and external communications. Since 2023, she has been managing cross-border cooperation in the Germany, Austria and Poland region, and since 2024, she has been driving forward the implementation of corporate marketing projects in six other European countries.

Bitkom represents more than 2,300 member companies from the digital economy. They generate annual revenues of 190 billion euros from IT and telecommunications services alone, including exports worth 50 billion euros. Bitkom members employ more than 2 million people in Germany. Its members include more than 1,000 medium-sized companies, over 700 start-ups and almost all global players. They offer software, IT services, telecommunications or internet services, manufacture devices and components, are active in the field of digital media or are otherwise part of the digital economy. Eighty per cent of the companies have their headquarters in Germany, 8 percent come from Europe and the USA, and 4 percent from other regions. Bitkom promotes and drives the digital transformation of the German economy and is committed to broad social participation in digital developments. The aim is to make Germany a leading global digital location.

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