

# The State of CRM in B2B: **Why AI Will Expose Your Data Problem**

At the same time global organizations are investing heavily in AI, automation, and digital transformation, relationship data continues to decay, manual entry persists, and institutional knowledge walks out the door when people leave. The result is a widening gap between the systems companies rely on and the reality of how relationships actually form, evolve, and transfer.

*“If their standard is a combination of the experience of CarPlay, chat interfaces, and voice assistants that provide answers in seconds with context built in, then their expectations are going to far exceed anything your existing enterprise software can provide.*

*And meeting that expectation ... depends entirely on whether the data beneath those systems reflects how work actually happens.”*

**— Lee Blakemore, CEO, Introhive**



# Organizations Are Running on Bad Data, and It's Not Changing Anytime Soon

Consider how often you're asked a question you should be able to answer immediately:

**"Who do we know at this account?"**

**"Has anyone spoken to their new CFO?"**

**"Why didn't we know the General Counsel moved?"**

On average, how often does answering it require digging?

Those gaps are the most glaring when the answers are needed most, whether that's before a pitch, or ahead of a customer meeting. If it were a similar question in your personal life, you would instinctively reach for your phone, or potentially ask Siri.

And yet, despite the significant investment your organization has made in CRM and other systems, your teams are still expected to

log into CRM, filter, drop down, sort, and then verify that data once more before it's considered trustworthy enough to act on for marketing and business development activities, or to send to senior leaders.

While most organizations believe they're data-driven, data has a shelf life. On average, data decays at a rate of **70% per year**. That means nearly a third of a CRM database can become outdated annually. In just two years, roughly half of the original contact records may no longer be reliable.

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## You Invested Half a Million in CRM

[Now look at your data.](#)

Hypothetically, if you had: **50 strategic accounts**, with **500 contacts each**, representing **25,000 relationship records**.

With average annual decay rates, as many as **17,500 of those contacts are likely outdated** because their titles have changed, individuals have moved on or retired, and the people making the purchasing decision are no longer the same (and not even reflected in your current data set).

The system cost your organization **hundreds of thousands of dollars** and, still, a significant portion of the data may not be able to support your revenue generating activities within a year.

## \$12.9 Million

The average annual cost of poor data quality, according to [Gartner](#).

## The Operational Cost of Searching for Answers

### 13 Hours per Week

The average time employees spend searching for data to fulfill requests.

Thirteen hours a week is nearly two full working days spent looking for information that should already be available and accurate.

Consider what thirteen hours a week could otherwise support. It could be spent strengthening account plans, refining campaigns, preparing senior leaders for critical meetings, or uncovering cross-selling opportunities before competitors step in.

#### The bigger issue is confidence.

Only one-third of executives say they trust their data enough to derive meaningful value from it. Meanwhile, [37% of CRM users](#) report that their organization loses revenue directly due to poor data quality.

## When Leaders Start to Question the Data

That level of skepticism isn't surprising given the moments that have become common across many firms.

For example, a senior leader asks whether your organization has a relationship inside a key account, and you share what CRM says, *while also noting* that there may be additional context, and you'll be sure to ask around to confirm. The information may be directionally right, but it doesn't feel definitive, and it's delivered with hesitation.

Worse, you find out weeks after a senior leader's meeting with a customer that they're expanding into a new service area or market. Had that insight surfaced earlier, the conversation could have been broader and more strategic. Instead, the opportunity was left unexplored, and the update itself was passed to you when someone mentioned seeing the customer's executive meeting with a competitor.

While these challenges are often blamed on the CRM, they reflect the condition of the data beneath it. When that foundation is incomplete or outdated, even the most sophisticated system can't deliver clear, reliable answers.

Marketing, business development, and IT are responsible for empowering professionals and leaders with clear, timely intelligence. When those insights come with caveats or require verification before action can be taken, those same leaders begin to question the advice they are being given.

# The Future Is a No Data Entry CRM



In addition to navigating menus and filtering reports to piece together answers in CRM, teams are still expected to manually enter and maintain the underlying data itself.

For decades, CRM systems have relied on manual input. Professionals log meetings after they happen, update contact records, capture notes, and record changes in relationships. The system depends on people remembering to document reality once the real work is done.

Most other enterprise systems, from payroll to procurement to expense management, are embedded into workflows and update automatically. CRM remains one of the few platforms that still relies on consistent, voluntary data entry from the busiest people in the organization, which is becoming harder and harder to defend.

Manual entry creates distance between what's happening in the market and what appears in the system. In relationship driven organizations, where growth depends on visibility and responsiveness, that delay carries consequences. By the time information is entered, the moment to act has likely already passed.

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## “If Only We Had Known”

The decision-maker in your target account left the company last week, the new buyer used to work for our biggest competitor, a senior leader at your organization had a personal relationship with the CFO, all of which you never tapped into. These moments happen every day because relationships change faster than CRM can be updated.

Traditional CRM systems were designed as systems of record, storing information once it's been entered. In fast-moving, relationship-driven environments, organizations need systems that reflect activity and **updates as they happen** and **surface intelligence through alerts before it's even requested**.

## What Proactive Visibility Looks Like

Signals detect and surface meaningful changes in key accounts and contacts as they happen, bringing visibility to role movements, engagement shifts, and emerging risks before opportunities are missed.

**Signals** detect and surface meaningful changes in key accounts and contacts as they happen, bringing visibility to role movements, engagement shifts, and emerging risks before opportunities are missed. These alerts surface in real time and can be consolidated into regular pre-meeting digests, giving professionals a clear view of what has changed so they walk into meetings prepared to offer timely guidance.

## From Data Entry to Data Capture

**The future of CRM requires removing the reliance on manual entry that was put there in the first place.**

Relationship data already exists in everyday activity. It lives in email exchanges, calendar meetings, matter collaboration, and ongoing customer communication. Instead of asking professionals to document that activity after the fact, modern technology can automatically capture interaction data, update contact records, flag new relationships, and enrich existing profiles as changes occur.

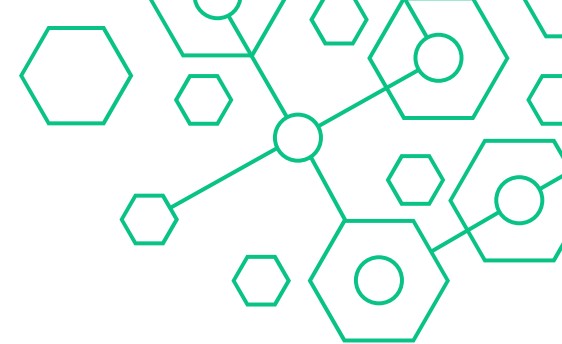
When someone changes roles, that update shouldn't depend on a busy professional remembering to edit a record. Similarly, when a new executive begins appearing in meeting invites or engagement with a key account starts to decline, the system should recognize those shifts and reflect them without requiring anyone to run a report or manually intervene.

The future of CRM is one in which all of your teams, across the entire organization, can see which relationships are becoming stronger over time, where customer engagement has decreased, and where trust and influence sits across the organization, without manually assembling the picture.

## “My CRM Vendor Is Offering ERM for Free. Shouldn't I Just Say Yes?”

In short, included doesn't mean integrated, and free does not mean *risk-free*. ERM sits at the center of your organization's relationship capital, customer data, and reputation. Basic add-on solutions often rely on limited data capture methods, lack enterprise-grade governance controls, and lock you into a single vendor ecosystem.

In complex, relationship-driven B2B environments, an ERM should unify relationship data across email, CRM, and collaboration tools, support granular governance controls, and scale across multiple systems. Where multi-CRM ecosystems, cross-border regulatory obligations, and distributed commercial teams are the norm, a lightweight add-on can introduce security exposure, incomplete data coverage, and long-term flexibility constraints.



# Can Your Data Support AI?

## What Are You Feeding Your AI?

*"I once made a batch of chocolate chip cookies with my grandmother. They looked perfect when they came out of the oven, but the first bite told a different story. "That's salt, honey," she said. I had used two cups of salt and no sugar.*

*AI agents work the same way. They'll confidently generate answers, recommendations, and outreach based on whatever inputs they receive. And if that underlying data is flawed, the output may look polished, but it won't be reliable because AI doesn't correct bad data, it scales it.*

*When your ability to win new business faster with existing customers hinges on the relationship data feeding the AI tech stack, it's that much more important to double check the label first."*

**– Joe Pallotta, Vice President of Sales, Introhive**

AI is moving quickly into day-to-day work. Thomson Reuters reports that GenAI use across enterprise organizations nearly doubled in 2026, with **40%** saying their company now uses it. AI is showing up in how organizations prepare for customer meetings, draft communications, analyze engagement patterns, and support growth initiatives.

The success of those initiatives rests squarely on the quality of the data beneath them.

According to Validity's 2025 CRM data research, only **45%** of CRM users say their CRM data isn't prepared for AI, and many are unsure how to assess their data's readiness at all.

That gap carries real implications.

AI systems draw from the same CRM records your teams rely on today. If contact histories are incomplete, if engagement data is

inconsistent, or if key stakeholders are missing from account records, AI will still produce output. It will generate summaries, suggest outreach, prioritize accounts, and recommend next steps based on whatever information is available.

Those outputs shape customer conversations:

✓ A meeting brief built from outdated records can omit an important relationship.

✓ A recommendation based on incomplete engagement history can misdirect attention.

✓ A customer communication drafted from flawed data can undermine credibility.

## What to Look for in a Technology Vendor in The Age of AI

As AI becomes embedded in customer-facing workflows, vendor standards matter more than ever. Any platform handling relationship data should meet enterprise-grade security requirements such as **SOC 2** and **ISO 27001**, support compliance obligations including **GDPR** and **CCPA**, offer granular governance controls like allow and deny lists, and operate in private tenant environments when required.

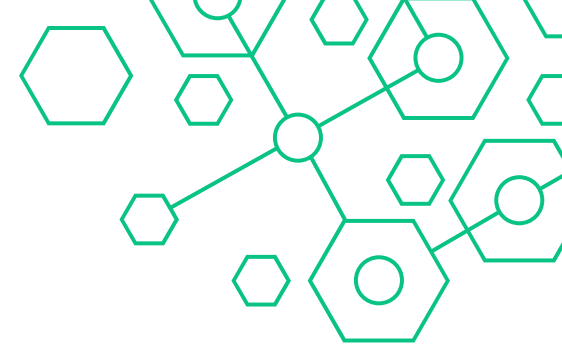
It should also integrate across multiple CRMs and mail systems without forcing vendor lock-in and continuously enrich and validate data rather than relying on static records or email signatures alone. When customer confidentiality and institutional reputation are on the line, your technology must meet the same standards your customers expect from you.

- ➔ Use our [AI Buyer's Guide Checklist](#) to assess vendor risk, governance standards, and data readiness.

## The Governance Risks That Lurk Beneath AI

Many organizations are deploying AI across marketing, business development, and customer-facing workflows without a clear line of sight into **how customer data moves** between tools. Relationship data may pass from CRM into drafting assistants, analytics platforms, or external AI systems, yet few companies have a consolidated view of how that information is processed, stored, retained, or reused.

When entrusted with sensitive customer information, that visibility matters. Governance includes understanding how customer data is handled, where it resides, how outputs are generated, and whether confidential or privileged information is exposed in ways the organization didn't intend.



# The Future of Agentic Teams

## Answers Without Friction

The priority is shifting from refining CRM systems to ensuring the data can power agent-driven workflows that meet the expectations your professionals now bring to work every day.

Your professionals are time-constrained and accustomed to technology that responds instantly. The cost of a key hire, the investment in senior leadership development, and the expectations placed on customer-facing teams leave little tolerance for friction in how information is accessed.

***“If your employees’ standard is a combination of the experience of CarPlay, chat interfaces, and voice assistants that provide answers in seconds with context built in, then their expectations are going to far exceed anything your existing enterprise software can provide.***

***And meeting that expectation, whether it is asking out loud for context ahead of a customer meeting or finding a warm path into a target account while on the treadmill, depends entirely on whether the data beneath those systems reflects how work actually happens.”***

**– Lee Blakemore, CEO, Introhive**

## Your Agentic Teammates Need Shared Context

AI agents are starting to support real work across marketing, business development, customer teams, and leadership. They help prepare meeting briefs, surface account insights, flag engagement changes, and assist with outreach. How useful they are depends on the data they can access. If that data lives in shared institutional memory, they can add real value. If it sits in disconnected systems and individual inboxes, their output reflects those gaps.

Most enterprise systems record activity. They log meetings and store updates, but they don’t consistently preserve the relationship context that explains how trust was built, how influence shifted, or how engagement changed over time. When a key individual leaves, much of that history leaves with them. Agents built on static records inherit the same blind spots.

**The next advantage in enterprise AI will come from institutional memory.** Email and calendar metadata, participation patterns, engagement frequency, and relationship overlap across the organization together form the context layer that supports customer health (including NPS scoring and customer dashboards), key account planning, and even succession planning.

## NPS Scores vs. Relationship Scores: What's the Difference?

While an NPS score captures how a customer feels at a moment in time, a relationship score measures actual engagement behavior: how often, how recently, and how deeply your teams are interacting with customers, turning everyday interactions into a dynamic view of account health.

[Learn more.](#)

When interaction data is captured continuously and preserved as shared context, both human teams and AI agents operate from the same foundation. Customer health signals surface earlier, relationship concentration becomes visible, and coverage gaps can be addressed before continuity or revenue is affected.

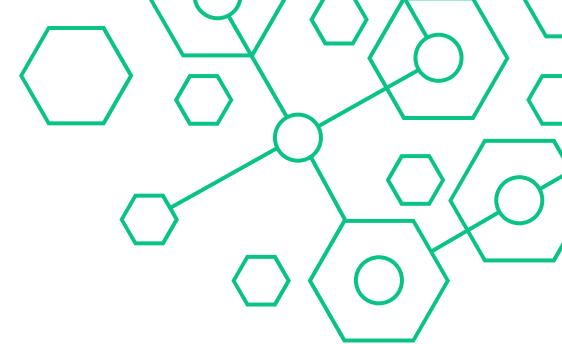
*"AI agents depend fundamentally on the memory systems powering them. When relationship capital exists only in individual minds and disappears with departing employees, **AI will merely accelerate institutional amnesia.**"*

*By systematically capturing interaction data as a permanent institutional asset, companies transform relationship capital from a fragile, person-dependent resource into durable AI infrastructure. This shared foundation enables critical business functions such as customer coverage, account planning, leadership transitions, and strategic growth, to operate from a complete, **continuous understanding of customer relationships**, rather than fragmented individual perspectives."*

**- Leyla Samiee, Chief Product and Technology Officer, Introhive**

Whether we're looking at AI tools or agents, all of this ultimately shows up in one place: growth.

# The Impact of Data Quality on Growth



In enterprise B2B organizations, growth depends on knowing exactly who to engage, when to engage them, and how to coordinate that engagement across business units, product lines, and regions. When relationship data is incomplete or outdated, that precision fades. Key stakeholders are missing from account records, titles are no longer trustworthy, and outreach reaches the wrong person or never reaches anyone at all, whether in buying committees, partner ecosystems, or channel networks.

Growth initiatives increasingly rely on technology, yet many organizations aren't

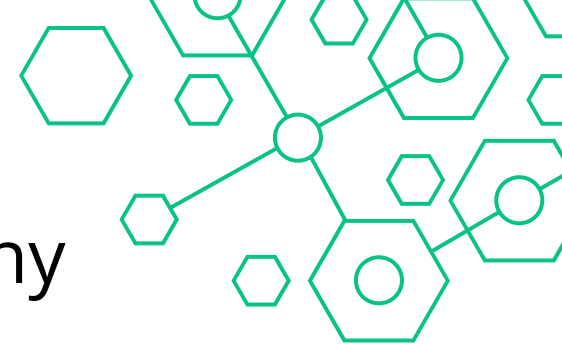
*Only 18% of companies report that they measure the return on investment or business impact of their AI tools.*

**– Thomson Reuters Institute**

measuring whether those investments are delivering meaningful business impact.

When organizations are unable to clearly measure impact, it becomes difficult to distinguish between strategic execution and data-driven friction.





# How Data Quality Shapes Growth Across the Company

## Marketing and Business Development

### What They Need to Know

Accurate stakeholder mapping and current roles.

Clear relationship visibility across practices.

Engagement trends over time.

Partner, channel, and ecosystem relationships and external network overlap.

Which accounts are heating up or cooling down.

### The Questions They Need to Answer

“Is this list current?”

“Who are we missing in this account?”

“Are we targeting the right decision-makers?”

“Are we reaching the full buying group across functions and geographies?”

“Who in the company has influence here?”

“How many stakeholders do we have relationships with at the customer account?”

“Is our relationship with this account dependent on a single partner in the company?”

### Operational Friction That Poor Data Creates

- Campaigns don't reach the intended audience.
- Key influencers are missing.
- Segmentation requires manual correction.
- Warm paths remain invisible.
- Relationship strength is assumed rather than verified.
- Partner and channel relationships aren't tracked or nurtured intentionally.

### Growth Risks

High-potential accounts receive less attention than they should.

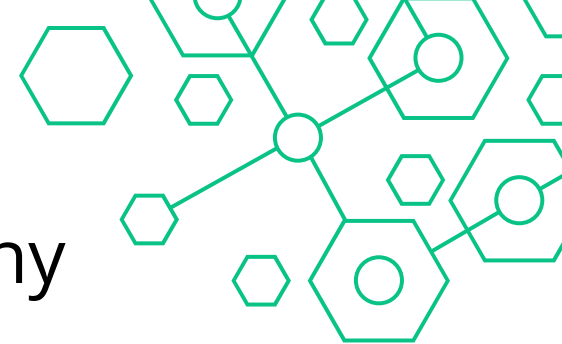
Campaigns underperform because the contact list is incomplete or outdated.

Outreach misses key stakeholders who were never captured in the system.

Account-based programs fail to generate results intended because the full buying group was never identified.

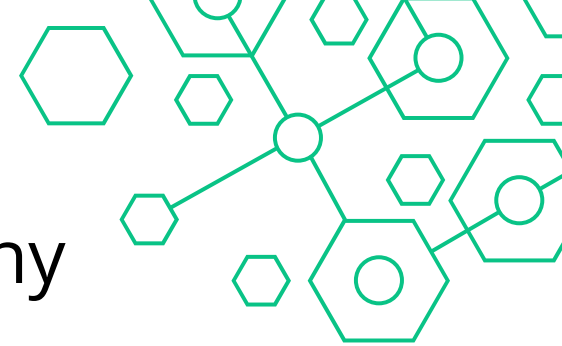
Expansion opportunities go unnoticed.

Warm introductions are delayed or never take place.



# How Data Quality Shapes Growth Across the Company

	What They Need to Know	The Questions They Need to Answer	Operational Friction That Poor Data Creates	Growth Risks
<b>Revenue and Account Teams</b>	<p>Current engagement history and multi-threaded coverage.</p> <p>Changes in meeting frequency and participation.</p> <p>Influence shifts inside the account or buying committee.</p>	<p>“Who has spoken to this customer recently?”</p> <p>“Has our engagement with this account changed recently?”</p> <p>“Are we losing touch with key stakeholders?”</p>	<ul style="list-style-type: none"><li>• Single-threaded relationships go unnoticed.</li><li>• Stakeholder shifts are missed.</li><li>• Declining engagement goes unnoticed until renewal conversations.</li></ul>	<p>Renewal conversations start from a defensive position.</p> <p>Relationships narrow to a single contact without anyone realizing it until someone leaves the company.</p> <p>Expansion conversations don't take place.</p>
<b>Professionals</b>	<p>Trusted, meeting-ready intelligence.</p> <p>Recent internal and external interaction overlap.</p> <p>Who else in the organization has engaged with this customer recently.</p>	<p>“Has anyone else spoken or met with my customer recently?”</p> <p>“What has changed since my last conversation?”</p> <p>“Where are there new opportunities for the company to deliver value?”</p> <p>“What has changed inside this account?”</p>	<ul style="list-style-type: none"><li>• Meeting briefs omit key context.</li><li>• Updates require caveats.</li><li>• Professionals spend time reconstructing context before meetings.</li></ul>	<p>Professionals walk into meetings without complete context.</p> <p>Conversations lack depth and don't convey the knowledge expected of a strategic commercial partner.</p>



# How Data Quality Shapes Growth Across the Company

	What They Need to Know	The Questions They Need to Answer	Operational Friction That Poor Data Creates	Growth Risks
Leadership	Institutional visibility into relationship distribution.	<p>“What’s the health of our most strategic customers? How often are we talking to them?”</p> <p>“Where is influence concentrated?”</p> <p>“Where do we have exposure?”</p> <p>“Which accounts rely on one relationship?”</p>	<ul style="list-style-type: none"><li>• Enterprise relationship capital sits with individuals.</li><li>• Revenue risk isn’t visible until a departure.</li></ul>	<p>Revenue remains concentrated with a handful of individuals instead of being distributed across regions, product lines, or account teams.</p> <p>Institutional knowledge leaves with lateral movement.</p>

## How *Exactly* Will We Send Out the Post Merger Announcement Before a Combined CRM?

The moment to activate growth across the combined organization arrives faster than most anticipate. In practice, the combined view of customer data may be **12 to 18 months away**. One organization runs on one CRM, the other on another. Calendar and email systems are separate. Data clean-up and platform rationalization become IT projects with long timelines. In the meantime, there's no reliable, unified view of who the combined organization knows, where relationships overlap, or which stakeholders are already over-contacted.

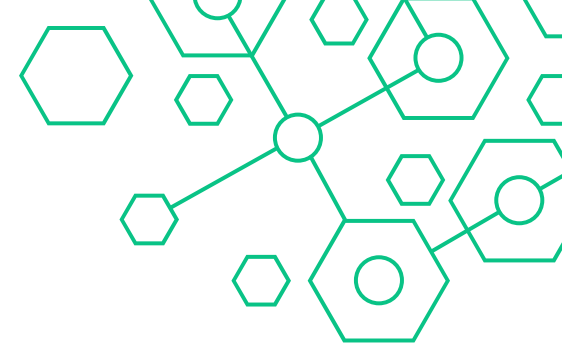
**Which raises the question: what do you do when leadership wants to communicate with the combined customer base?** When marketing is asked to send a joint announcement? And when business development teams need to begin exploring cross-selling opportunities?

Introhive provides that visibility immediately. By connecting to both companies' email, calendar, and CRM systems, it creates a consolidated view of customers and contacts without waiting for a full CRM migration or multi-year integration project.

## How Poor Data Quality Undermines Inorganic Growth

Studies frequently cite that 70–75% of M&A transactions fail to deliver their anticipated value. That gap often reflects relationship assumptions that were never validated. Customer revenue may appear stable, yet engagement depth, stakeholder coverage, and relationship concentration often go unmeasured during due diligence.

With a combined view of customer data across both organizations, marketing can confidently communicate with the combined customer base, business development can identify cross-serving opportunities, and leadership can see where engagement is multi-threaded or concentrated with a single individual, allowing growth to begin on day one while system integration continues in parallel.



# The Future of ROI

ROI conversations around CRM and relationship technology have traditionally focused on usage metrics. Logins, adoption rates, and activity counts became proxies for success. In 2026, ROI conversations are moving beyond adoption metrics and toward **measurable business outcomes**. Time recovered from manual work, stronger campaign execution, higher-quality customer data, and the ability to uncover growth opportunities that would otherwise remain invisible all provide a clearer measure of value for leadership.

Technology investments should help organizations operate more intentionally, enabling a customer-centric approach where marketing, business development, and customer teams work from the same view of customers and priorities.

*“They kept asking, ‘How many people are logging in? Are we getting adoption? This is really expensive. I stopped engaging in those conversations. It’s not about logins; it’s about how the data improves our marketing, drives growth, and saves time and money. That’s the conversation we should be having.”*

**– Beth More, Chief Marketing Officer, Grassi**

## Adoption That Works for Partners and Professionals

Adoption grows when technology makes life easier for leadership and professionals. When relationship data updates automatically and insights surface in the flow of work, professionals start relying on the system because it helps them prepare, engage customers, and make decisions without adding extra steps or administrative effort.

*“We chose Introhive’s platform because it will not only give us valuable insights into our client relationships, it will do so securely and instantly, across the entire firm.”*

**– Barry Devereux, Managing Partner, McCann FitzGerald**

*“Introhive captures that data from every interaction, every meeting that our fee earners have and puts that information straight into our databases. It’s up to date, it’s timely, it’s clean, it’s correct, it’s frictionless and it doesn’t require the fee earners or the admin support to put any manual effort into the process.”*

**– Leor Franks, Chief Business Development & Marketing Officer, Kingsley Napley**

## The Cost Savings of Contact Discovery and Enrichment

One of the most immediate sources of ROI comes from eliminating manual contact discovery and data maintenance. Time previously spent researching contacts, updating records, or preparing lists shifts back toward customer engagement, account planning, and revenue-generating activity. Automation reduces administrative burden, while simultaneously improving data quality at scale.

*"Introhive's automation capabilities alone have saved over 78,000 hours of admin time across our 300 active advisors this year. Without Introhive, advisors would have fewer insights into client accounts and would be required to manage more manual processes, which would be further hurting our adoption of CRM."*

**– Neven Bradasevic,  
Senior Manager – Business Success,  
Canada, Colliers**

*"Initially we brought in 12 months of historical data on our contacts. The implementation was painless, quick, and training was minimal. Little effort, high reward. If someone is moving CRM systems, the pain of data migration is intense. Introhive streamlined the process and made it immediately usable."*

**– Stuart Cassie,  
Sales, Marketing & Alliance Director,  
Hitachi Solutions**

## Visibility That Translates Into Growth

ROI becomes clear when relationship intelligence drives decisions across the organization. Leadership gains visibility into engagement patterns, marketing and business development teams engage the right stakeholders, and customer teams identify opportunities earlier. As a result, relationship data becomes something teams use to guide actions that drive growth.

*"Our firm loves the transparency Introhive provides our professionals into "who knows who" relationship insights. Right after go live, our firm was able to win a new deal valued at \$250,000 thanks to the Introhive platform."*

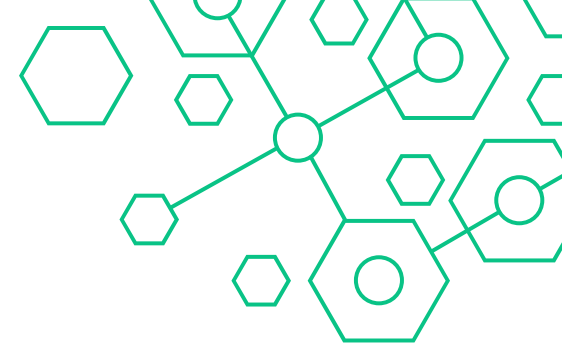
**– Erin M. Connolly-Kriarakis,  
National Marketing Director –  
Account Management, CRM and Field  
Marketing, CohnReznick**

*"The most important thing Introhive did was that it uncovered relationships we didn't know we had, that was the key win."*

**– Jeri Ross, Director – Market Insights,  
KPMG Canada**

*"As part of my normal weekly cadence, I can see my top clients, prospects, and referral sources all in one centralized place. I can also see the last time other members of the team and I contacted them, making it a powerful tool to continuously develop seamless relationships across clients."*

**– Brendan Kurvers, Principal, CLA**



## Why Introhive

Introhive is the only enterprise-grade solution built specifically to close the CRM blind spot for leading global organizations – **regardless of where you are in your CRM journey.**

✓ **Security & Compliance:**  
Certified to the highest standards (SOC 2, ISO 27001, GDPR/CCPA).

✓ **Flexibility:**  
CRM-agnostic and built to scale across geographies, practices, and service lines.

✓ **Ease of Adoption:**  
Works seamlessly in the tools professionals already use every day, minimizing training and resistance.

✓ **Data Enrichment:**  
90% accuracy, multi-source enrichment, and continuous AI-powered cleansing.

✓ **Relationship Intelligence:**  
Actionable insights into growth opportunities, customer risk, and succession planning.

✓ **Global Expertise:**  
A proven partner to leading B2B and multinational organizations worldwide

## Where Shared Relationship Insights Drives Impact

**Winning and Expanding Accounts:**  
Bid Management, Account Planning, Multi-threading

**Reducing Risk And Surprises:**  
Monitoring Relationship Changes, Tracking Job Changes

**Scaling Through Change:**  
Pre-acquisition Due Diligence, Post-M&A Data Consolidation, Succession Planning

**Improving Collaboration:**  
Coordinated Internal Collaboration and More Effective Cross-Selling

**Have a digital transformation project that's stalling?**

→ [See how data centralization can help you accelerate time to value.](#)

## Trust and Security Built In

**Introhive was engineered with security, privacy, and compliance as first principles.**

Only collects the data required, and only what's essential.

Limits the amount of data transmitted between customer and server.

Encrypts data in transit and at rest.

Provides granular permissions, role-based access controls, and audit trails.

### Learn more:

- [Introhive's approach to data collection and security](#)
- [Overcoming the Black Book Mentality & Why Introhive is Not Big Brother](#)

## Ease of Adoption and Implementation

When professionals are pressed for time, new tools only succeed if they fit seamlessly into the way they already work. **Introhive removes adoption barriers and delivers value from day one:**

Deploys quickly with proven implementation playbooks tailored to your organization.

Integrates directly with existing CRM, email, calendar, and collaboration systems.

Works in the background, requiring no extra steps from busy partners and professionals.

Delivers immediate wins with automated contact capture, meeting digests, and relationship insights.

*"Implementing Introhive was one of the simplest we've come across in terms of implementations, very straightforward, both from a technical perspective but also from a training and the results are that our adoption rates are great."*

**– Rob Talson, Chief Digital Officer, Evelyn Partners**

