

Scale at Speed™



Thought Leadership

Beyond the Hype: The Rise of Agentic AI: A New Paradigm for Software Services

Authors

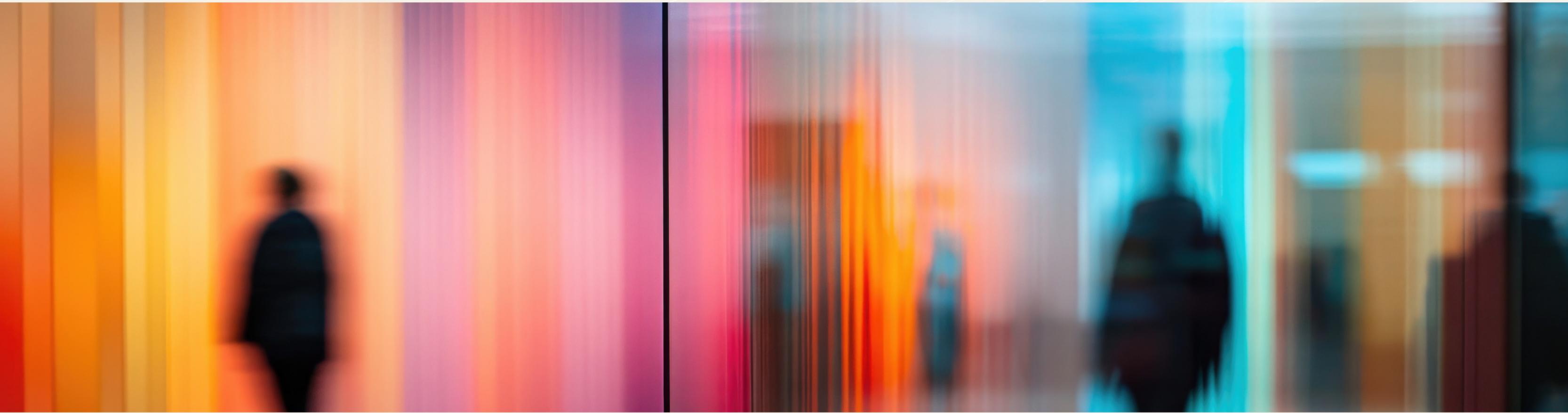
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Executive Summary

For senior leaders, the rapid evolution of AI raises the immediate question of how to build a truly effective digital workforce at enterprise scale to enhance customer facing interactions. The immediate question it raises for software services isn't about building better code, but about how to create a truly effective digital workforce at an enterprise scale. The answer lies in systematically converging three powerful elements: autonomous AI agents, clean real-time data, and a central CRM platform. This combination enables a critical evolution from AI that merely assists humans to AI that takes decisive action to enhance personal interactions. This changes the dynamics and speed of customer interactions, increasing customer satisfaction resulting in increased revenue, operational efficiencies and profitability. This new paradigm of agentic AI offers a clear path to augmenting human teams, scaling operations with precision, and unlocking new levels of customer value.



Key Takeaways



The evolution of AI as an advisor.



Agentic AI augments the human workforce and work in tandem to create a new paradigm of customer service and engagement



The new dynamic shifts the focus of staff from tactical interactions to strategic customer alignment.



Agentic AI, real-time data, and CRM as the foundation of the next-generation digital workforce



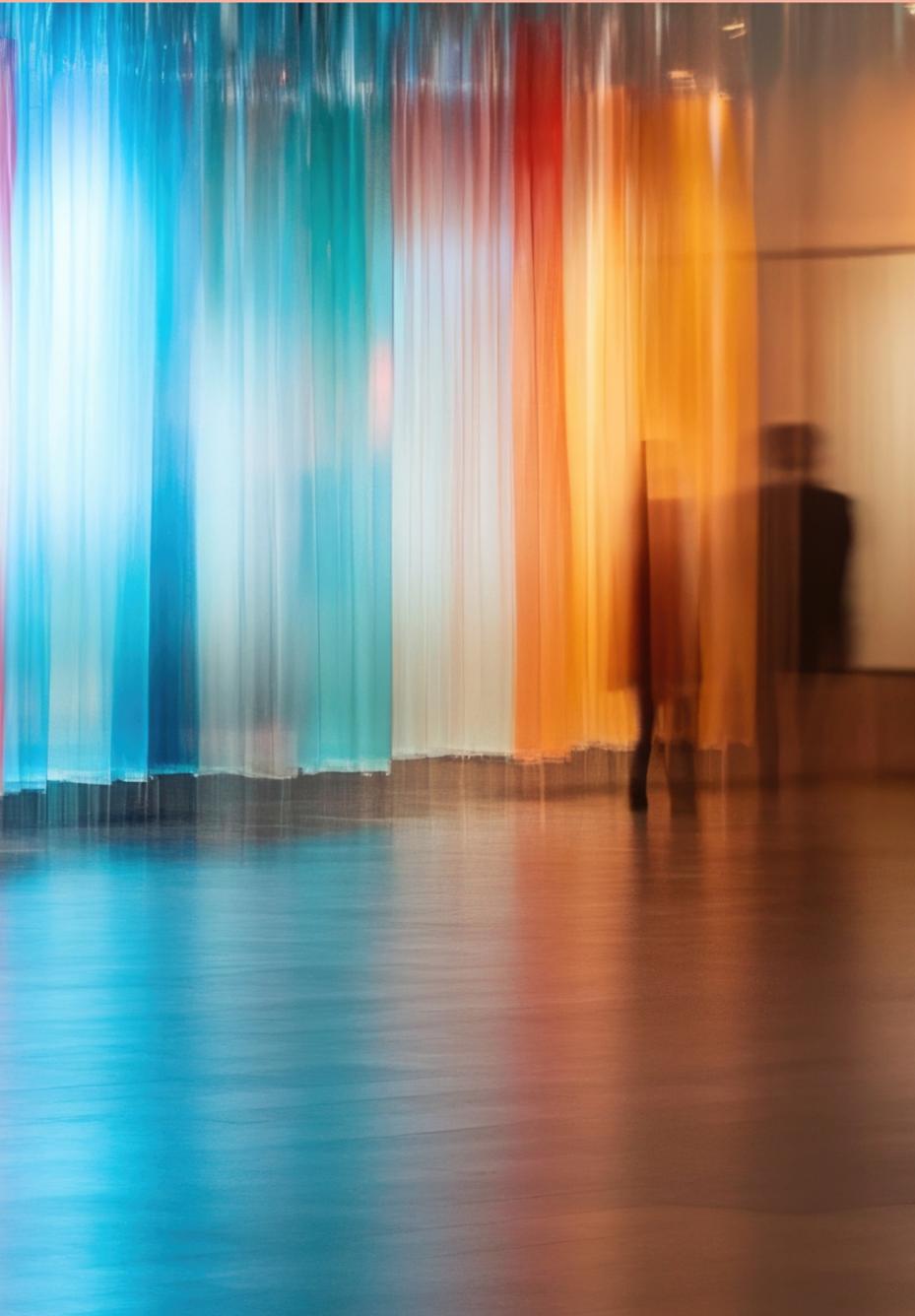
Introduction

From AI as Advisor to AI as Actor

This year marks my 28th year in the customer relationship management (CRM) industry. Over the years, I have seen this sector grow with the advent of newer technologies. From an industry deeply rooted in manual operations to automating routine tasks with AI and utilizing AI as a decision-making tool, CRM has consistently kept pace with tech trends. But what if we could push this innovation even more? Agentic AI proves its capabilities across different sectors¹, I believe this is the perfect opportunity to take the next leap and usher in a new era of customer relationship management where humans and AI forge deeper customer bonds together. According to one of the survey, more than 50% businesses are considering empowering their customer-facing employees with AI agents in the immediate future². These AI agents are autonomous entities capable of understanding a goal, creating a multi-step plan, executing that plan across different applications, and learning from the outcome. While AI-powered dashboards and next-best-action recommendations are valuable, they are passive in nature and consistently stop short of execution. The burden of translating insight into action remains a human responsibility, resulting in a persistent gap between knowing and doing and needlessly slowing the pace of operations. AI fundamentally changes this status quo. These advanced AI agents not only generate decisions and next-best-course but also act on them. A recent Gartner press release opines that by 2029, AI agents will be able to handle almost 80% of customer tickets without human intervention³. This shift results in a 30% cost reduction for many clients while greatly reducing time to action and customer satisfaction. But before we reach that point, how can agentic AI address some of the pressing CRM issues in the near future?



Turning Challenges into Opportunities



The Scale and Speed Dilemma:

Customer expectations for 24/7, instantaneous, and personalized service have grown exponentially. For global operations, meeting this demand by simply increasing human headcount is neither financially sustainable nor operationally feasible. But agentic AIs are a cost-effective alternative to this conundrum. They are infinitely scalable and easy to deploy, making them a perfect solution for both scalability and speed.

The Personalization Paradox:

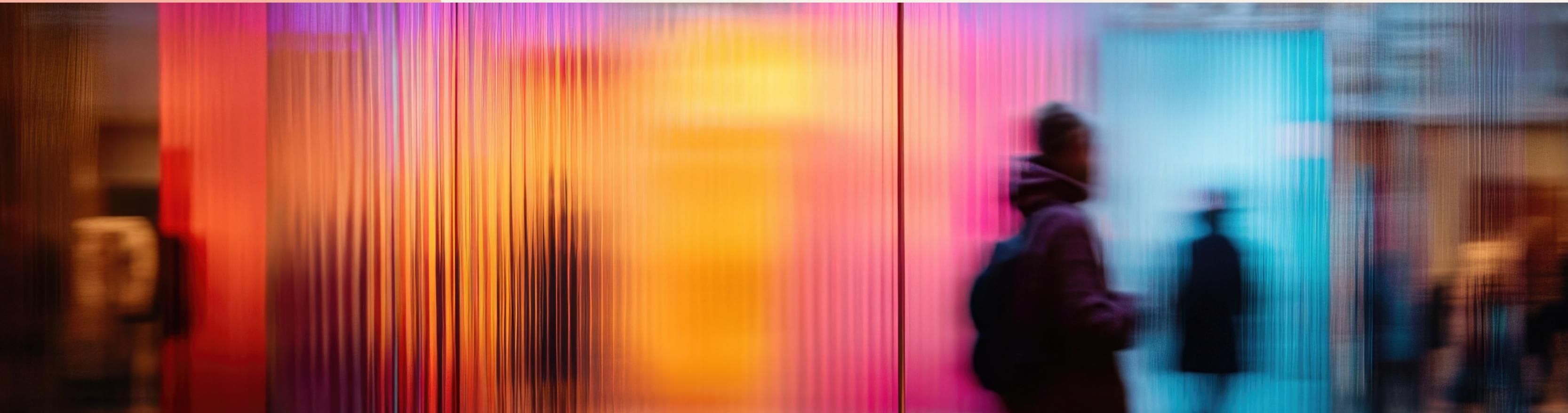
Customers expect a business to know them intimately across every touchpoint. However, siloed departments and fragmented data systems make delivering a consistently coherent and personalized journey a monumental challenge, leading to disjointed and unsatisfying experiences. AI agents can proactively assess customer interaction across touchpoints and customize customer experiences in real-time⁵.

The Data-Action Gap:

Organizations possess vast amounts of customer data, yet struggle to activate it at the decisive moment. By the time data is analyzed and an insight is delivered, the window of opportunity to personalize an experience or prevent an issue has often closed⁴. Speed to action and personalization can only be achieved if data is organized, integrated and analyzed seamlessly. With Agentic AI in the CRM ecosystem, businesses can capitalize on any opportunity, as these agents can proactively generate insights and execute any actionable plan thereafter.

Agentic Workforce in Action: Real-World Scenarios

Consider a global manufacturer of high-value industrial equipment. An IoT sensor on a client's machine detects an anomaly that indicates a high probability of future failure. In the old model, this triggers an alert on a dashboard. A service manager must notice it, investigate, create a case, check the client's service level agreement, find a qualified technician, and manually contact the client. The process is slow and reactive. With an agentic workforce, the real-time sensor data flows directly into the system. An AI agent immediately detects the alert. It cross-references the machine's service history in the CRM, confirms the client's premier SLA, autonomously creates a high-priority service case, and identifies an available technician with the right skills. It then proactively sends a notification to the client with a proposed service time. The entire workflow is executed in seconds. The human service manager is presented with the completed plan for a final confirmation, transforming their role from a manual coordinator to a strategic overseer. In fact, the Agentforce solution from Salesforce is specifically designed to achieve this for every business⁶.



Agentic Workforce Scenarios in Banking and Telecom Industry:

Personalized Customer Service in Banking: AI-powered chatbots and virtual assistants can handle routine customer inquiries 24/7. These agents can access and analyze a customer's history to provide personalized recommendations, manage account issues, and even offer financial advice.

In the context of software services, especially with a platform like Salesforce, agentic AI implementation in the telecom industry offers a powerful way to move beyond simple automation to truly autonomous, proactive operations. Sharing a key use case below:
1. Proactive Customer Service and Support: Traditional chatbots are reactive; they wait for a customer to ask a question. An agentic AI, powered by Salesforce's Einstein platform and Data Cloud, is proactive.

Use Case:

Automated Service Issue Resolution. An agentic AI constantly monitors network performance data, customer usage patterns, and social media mentions. Perception: It detects a series of dropped calls or slow internet speeds in a specific geographic area. Reasoning: The agent understands this is a potential service disruption. It cross-references the location with customer data in Salesforce to identify all affected customers.

Action:

Instead of waiting for customers to call in, the agent automatically creates a proactive service case. It sends an automated, personalized text message or email to affected customers, informing them of the issue, providing a timeline for resolution, and offering a small credit on their next bill. This message is sent even before the customer realizes there's a problem.

Outcome:

Drastically reduces inbound support calls, improves customer satisfaction (NPS), and transforms customer service from a reactive cost center into a proactive, relationship-building function.

Laying the Foundation for the Agentic Workforce

To unleash this level of customer engagement, we require a new operational model built upon a cohesive digital workforce. This workforce will be composed of three four integrated pillars that together create a system for intelligent, autonomous action.



1 Agentic AI: The Digital Workers

The core of this model is agentic AI. Unlike previous AIs that would suggest a response to a customer complaint, an AI agent can be empowered to resolve it. It can analyze the customer's history, identify the root cause, issue a credit, schedule a follow-up call with a human specialist, and log the entire interaction, all without direct human intervention for each step. This is the new digital labor force, executing complex workflows at machine speed.

2 Real-Time Data: The High-Octane Fuel

The CRM is the nervous system and collaborative workspace where everything converges. It provides the rich historical context and the "Customer 360" view that informs the agents' actions. Within a unified environment like the Einstein 1 Platform, the CRM becomes the plane of action where AI agents, human employees, and customer data interact seamlessly. Agents work within the CRM to update records, trigger workflows, and surface insights, directly enriching the system of record.

3 CRM: The Central Workspace

An AI agent is only as effective as the data it receives. Stale or incomplete information leads to poor decisions. The workforce, therefore, requires a constant stream of clean, real-time data. This is achieved through a unified data engine, such as Salesforce Data Cloud, which harmonizes information from all sources. It feeds the agents the up-to-the-second context needed to make relevant and accurate decisions.

Model Context Protocol is a recently introduced, open standard for AI agents that acts as a standardized bridge between AI agents and external tools or data sources. Instead of relying on bespoke, one-off integrations for every single tool or database, MCP provides a universal, "plug-and-play" framework. This significantly streamlines the process of real-time data retrieval for AI agents.

4 Customer Orchestration: Redesigned Operations

Augmented with AI Agents built around CRM, organizations must rethink and redesign customer interaction and processes. Actors, agents and relationship managers are empowered with these tools to accelerate interactions with customers, shift from addressing tactical issues and able to be viewed as partners in bringing efficiencies and higher quality to customer operations.

This combination evolves the idea of a digital labor force into something more powerful, where humans are augmented instead of being replaced. The digital workforce handles the high-volume, process-oriented tasks, freeing human talent to focus on strategic relationships, creative problem-solving, and managing exceptions.

Why Tech Mahindra The TechM Factor

Tech Mahindra brings three strengths to transform customer facing interactions leveraging AI. First, with Tech Mahindra's deep industry focus, they understand the nuances of customer processes, interactions and services within core industries. Second, Tech Mahindra has extensive experience and scale in building the technical foundation for the Agentic AI enabled workforce. Finally, Tech Mahindra consulting and change management capabilities will guide clients through an efficient and rapid transformation.

The New Mandate for Leadership

Deploying an agentic workforce requires a new approach to management. The focus of leadership shifts from supervising people to orchestrating outcomes. The primary responsibilities are designing clear goals, defining the ethical and operational guardrails within which agents operate, and expertly handling the complex exceptions that agents escalate. It is a strategic role focused on architecting a highly efficient and intelligent operational system. The convergence of agentic AI, real-time data, and CRM is not an incremental improvement. It is a foundational change in how businesses operate and scale. Building this digital workforce is a strategic journey, and the organizations that begin now will define the future of operational excellence and customer engagement.

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About Tech Mahindra

Tech Mahindra (NSE: TECHM) offers technology consulting and digital solutions to global enterprises across industries, enabling transformative scale at unparalleled speed. With 152,000+ professionals across 90+ countries helping 1100+ clients, Tech Mahindra provides a full spectrum of services including consulting, information technology, enterprise applications, business process services, engineering services, network services, customer experience & design, AI & analytics, and cloud & infrastructure services. It is the first Indian company in the world to have been awarded the Sustainable Markets Initiative's Terra Carta Seal, which recognises global companies that are actively leading the charge to create a climate and nature-positive future. Tech Mahindra is part of the Mahindra Group, founded in 1945, one of the largest and most admired multinational federation of companies. For more information on how TechM can partner with you to meet your Scale at Speed™ imperatives, please visit <https://www.techmahindra.com/>.



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