

Unlocking Customer Value with Agentic AI

Blueprint





As enterprises move past the hype cycle of generative AI, many are turning their attention to a more outcome-driven approach: agentic AI. Unlike traditional AI tools that require constant prompting, AI agents act autonomously to complete multi-step tasks, with measurable business value.

In this paper, we'll explore what agentic AI really means and how it can be applied to help customers increase revenue, improve retention, and deliver personalized guidance to customers at scale.





What is Agentic AI?

Agentic AI is the use of AI-enabled agents which are capable of executing complex, multi-stage workflows, using existing tools and systems to achieve defined goals without constant human input.

While generative AI tools are reactive and rely on continuous human interaction to prompt and input information, agentic AI can continue a process independently, acting with agency to perform tasks on behalf of the business.








“AI agents will become the primary way we interact with computers in the future. They will be able to understand our needs and preferences, and proactively help us with tasks and decision-making.”

— **Satya Nadella, CEO of Microsoft** ¹

¹ APNews, Ignite 2024, Satya Nadella, CEO of Microsoft



How is Agentic AI Different from Generative AI?

Capability	Generative AI	Agentic AI
 Core Function	Creates new content (text, images, code, etc.).	Executes multi-step workflows and automates decision-making, using tools and APIs where
 Interaction Style	Requires human prompting for each task.	Acts independently once given a goal.
 Workflow Management	One-off, task-based.	End-to-end process automation.
 Adaptability	Reactive. Responds only to input.	Proactive. Can plan, adapt, and respond across changing conditions.
 Typical Output	Text, images, code, answers.	Outcomes, decisions, completed workflows.
 Role in Business	Boosts individual productivity.	Drives organizational impact and efficiency.
 Integration with Systems	Often isolated or embedded in point solutions.	Connects across platforms and systems.



An agentic system can plan its own actions, use digital tools to complete those tasks, leverage generative AI to create content, collaborate with other agents, and improve over time.

Key differentiators of agentic AI over traditional process automation is that agents can:

- **Manage unpredictable workflows**, without a need for rule-based systems which break down when faced with the unexpected.
- **Be directed with natural language**, allowing complex workflows to be encoded quickly and easily, and opening access to non-technical employees.
- **Work with existing software and platforms**, communicating across the whole digital ecosystem and gathering information from any source.

“With generative AI, you put something in, you get something out. And if you want more, you’ve got to keep doing it over and over again. What makes agentic AI different is that it will continue the process, and not just give you the next response but give you the end result that you’re really working for. And then you can multiply that across use cases, and that’s really where you start to unlock its power. It’s doing things beyond what is humanly possible within a given timeframe.” — **Andrei Kharazia, Senior Vice President of Technology & Engineering, Thought Industries**





What Can Agents Do?

Depending on your industry, the possibilities for agentic AI are endless.

- **Want to keep pricing competitive across your product portfolio?**
Imagine an agent that tracks your competitors' pricing, calculates strategies to maximize profits, and dynamically applies pricing changes or customer discounts, all without you lifting a finger.
- **Looking to ensure customers are up to speed on your product?**
An agent could read customer feedback, figure out where people are struggling, and automatically suggest and even run A/B tests to improve your support and learning content.
- **Planning an offsite conference?**
Just say the word. Your flight is booked, the right hotel found, and everything has been added to your calendar ahead of time. Hey, the agent will even submit your expenses for you.
- **Interested in boosting productivity in customer onboarding?**
Consider an agent that gathers data about new customers by pulling from existing online records, spots issues worth flagging, and saves your team hours on manual data collection.
- **Is analyzing data on your wishlist?**
An agent can help you to analyze and visualize wide swaths of data to meet your goals or requirements, eliminating the need for error-prone manual spreadsheet work.



Incorporating Agents to Guide Customers to Value

When businesses help users achieve meaningful outcomes, not just access features, they deepen engagement, strengthen loyalty, and unlock more revenue potential. Customers who are actively guided to value are more likely to stay, grow, and advocate for your brand. But without that guidance, customers may struggle to realize value on their own, increasing the risk of churn and missed opportunity.

Agentic AI unlocks a new path to customer value realization by actively identifying, enhancing, and personalizing the value customers get from your products. By automating insights and taking action, agents help drive stronger retention and revenue, ensuring customers not only stay, but grow.

One potential area for agentic success is in intelligent data gathering. Agents can be deployed across systems of record such as CRMs, support platforms, ERPs and survey tools. They can then extract and synthesize data tied to business goals, identify trends in customer behavior, product usage and support interactions, and surface insights that answer crucial questions, such as “How can we boost retention and revenue?”

Agents can then use the insights from this data to create content such as personalized training materials, onboarding flows, and support documentation, distributing that content autonomously across relevant channels. This frees up teams to let go of repetitive tasks and spend time on strategic decision making instead.

In essence, agentic AI goes beyond simply offering tools and actually helps to drive meaningful outcomes. It automates tasks that once required significant human effort, allowing businesses to enhance customer value, improve retention, and boost revenue, all while empowering teams to focus on more strategic work.

Let’s look at four tasks Thought Industries is developing agents to automate.



According to the Learning Performance Institute, “Making impact visible — building smarter frameworks to track success, prove value, and inform strategy” is a top three challenge in 2025.

We regularly see this in the wild: companies with customer education programs struggle to measure the impact of training content on business outcomes. It’s difficult to manually identify how training can help drive the behaviors that lead to product adoption, churn reduction, and account expansion.

To improve visibility into training impact and take action on those insights, agentic AI can:

- 1** Generate reports based on the value customers have gained from training.
- 2** Allow users responsible for customer retention and growth to generate graphs, explore patterns, and ask questions about learning performance using natural language.
- 3** Proactively alert program managers on ways to improve learning impact, such as modifying a course or assigning specific content.
- 4** Automatically execute those suggestions, whether by sending a nudge or provisioning a course to a customer.





Create the Right Learning Content

Creating the right learning content at scale is a persistent challenge for many organizations. It's difficult to know what content will actually drive impact, and even harder to tailor it to different customer needs, roles, or moments in the journey. To deliver personalized learning at scale, agents can automate content creation and adaptation, including:

- 1** Recommending and automatically creating content for customers based on their behavior, preferences, prior knowledge, and lifecycle stage.
- 2** Offering relevant training in a variety of formats, from microcourses to articles to videos, based on user preferences.
- 3** Scaling the impact of the customer education team by allowing them to focus on high value tasks while amplifying their effectiveness.



Improve Customer Value Realization with Smart Recommendations

More than half of customers will switch to competitors without ever sharing their complaints, so it's crucial to find alternative ways to gather feedback and proactively improve customer value realization. To translate public feedback and competitive insights into concrete, actionable improvement plans, an agent can collect public signals from the web at scale and:

- 1 Identify the product capabilities you offer and industries and buyers you serve.
- 2 Evaluate customer perception of the value they get from your products.
- 3 Compare this to the customer perception of competitors.
- 4 Identify opportunities for you to improve customer perception, generating proposals and action plans.
- 5 Execute these plans by creating content or communication to address the identified gaps.

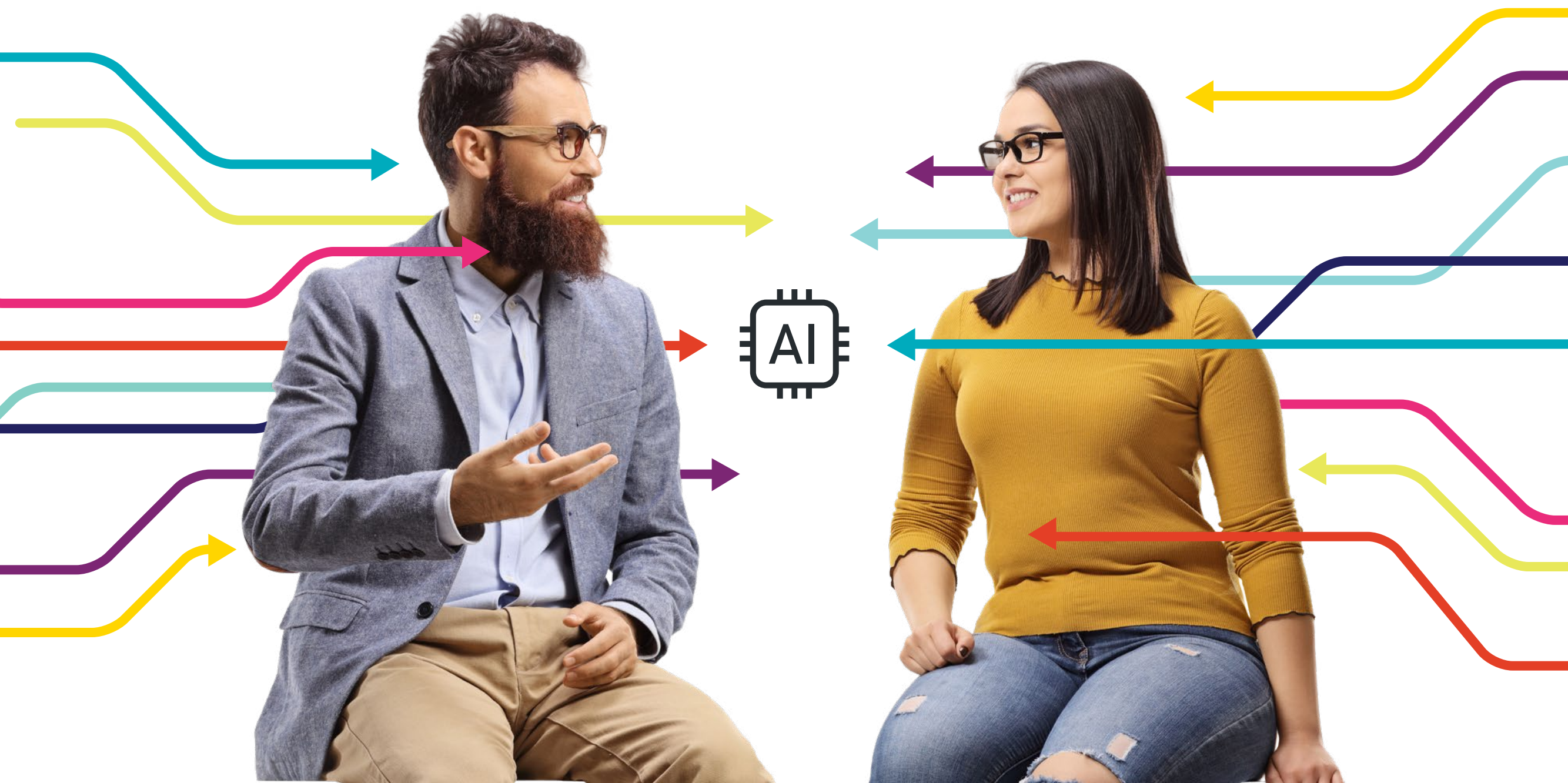


"The agent scrapes the web, reviews sites, Reddit, anywhere people might be talking about our customer and the products they sell, pulls that information in and packages that up into an understanding of what capabilities our customer's products have and don't have and what the public perception is. The immediate reaction we're getting from the Customer Value agent is 'This is interesting. I didn't know our customers were saying this about us!'" — **Jared Ranere, Chief Product Officer, Thought Industries**



Connect Business Systems to Understand Customer Behavior

In conversations with customers and prospects, we've consistently heard that data integration is a major source of friction. Businesses don't know what to do with unformatted or messy data. They don't know where to start on integration challenges. They can only gather data from a single source, or of a snapshot in time. To better connect siloed systems and create a unified view of customer value and performance, agentic AI can be used to:



- 1 Connect to business systems such as a CRM, LMS, or support, billing, analytics, and survey tools.
- 2 Use this data to identify the customers who are realizing the most value from a company's products and services.
- 3 Evaluate the behaviors contributing to the top customers' health and performance.
- 4 Leverage this data to benchmark the health of all customers against the best ones.
- 5 Identify areas to improve value realization and lifetime value for other customer cohorts.
- 6 Generate action plans for targeted interventions.
 - Examples include creating learning content in an LMS, drafting email communication or notifications delivered via a CRM, and assigning tasks in a project management tool for teams to execute.
- 7 Implement the action plans by distributing content and communication through appropriate channels, whether it's publishing to the company's blog, adding documentation to the knowledge center, or sending out learner notifications in an LMS.



Building Your Agentic Advantage with Thought Industries

As revenue growth increasingly depends on delivering and expanding value for existing customers, businesses need ways to identify what's working, and the technology to scale it. Agentic AI offers a powerful lever: by surfacing insights from across the customer journey and automating the interventions that drive impact, it helps companies proactively guide more customers to success.

Whether it's closing value gaps through personalized learning, improving retention with smarter content, or pinpointing the behaviors of your best customers, agents make it possible to act faster and more effectively, across more touchpoints, with less manual effort.

Agentic AI isn't just a technical evolution, it's a strategic one. The opportunity is on the table to operationalize what drives customer value, and build a more efficient, resilient business in the process.

**Your best customers show you what success looks like.
Let agentic AI help you replicate it, unlocking revenue
and retention on the way.**

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