

# From business-driven automation to customer centricity with **AI-powered journey orchestration**





## Introduction

In this whitepaper, we explore the question of how to establish sustainable real-time automation with limited resources to [bridge the chasm between business-driven automation and true customer centricity](#).

Managing marketing automation through predefined campaigns triggered by rigid schedules is an outdated approach that has become increasingly obsolete. It often results in delayed responses or misaligned messaging, leading to a disconnect between businesses and customers.

Relevant, real-time, scaled communication has become a marketing standard. Companies must understand and respond to the full, cross-channel customer journey. [It is not possible for a human team to analyse and decide at such scale](#).

[Fortunately, artificial intelligence is here to work with us](#). Because AI can understand, reason and learn from massive and diverse data inputs, thus help marketers' make better decisions and deliver quick automated responses. And customers' experiences can thrive.





# Imagine ...

... you could depend on human and AI capabilities to identify your customers' intentions and determine the best next step, adapted in real time for the best ROI.

... you could “talk” with your customer, by analysing their feedback in real time and responding promptly and with true relevance.

... you had a trusted marketing “nervous system” that senses customers' latest channel preferences and directs the journey to where customers really are.

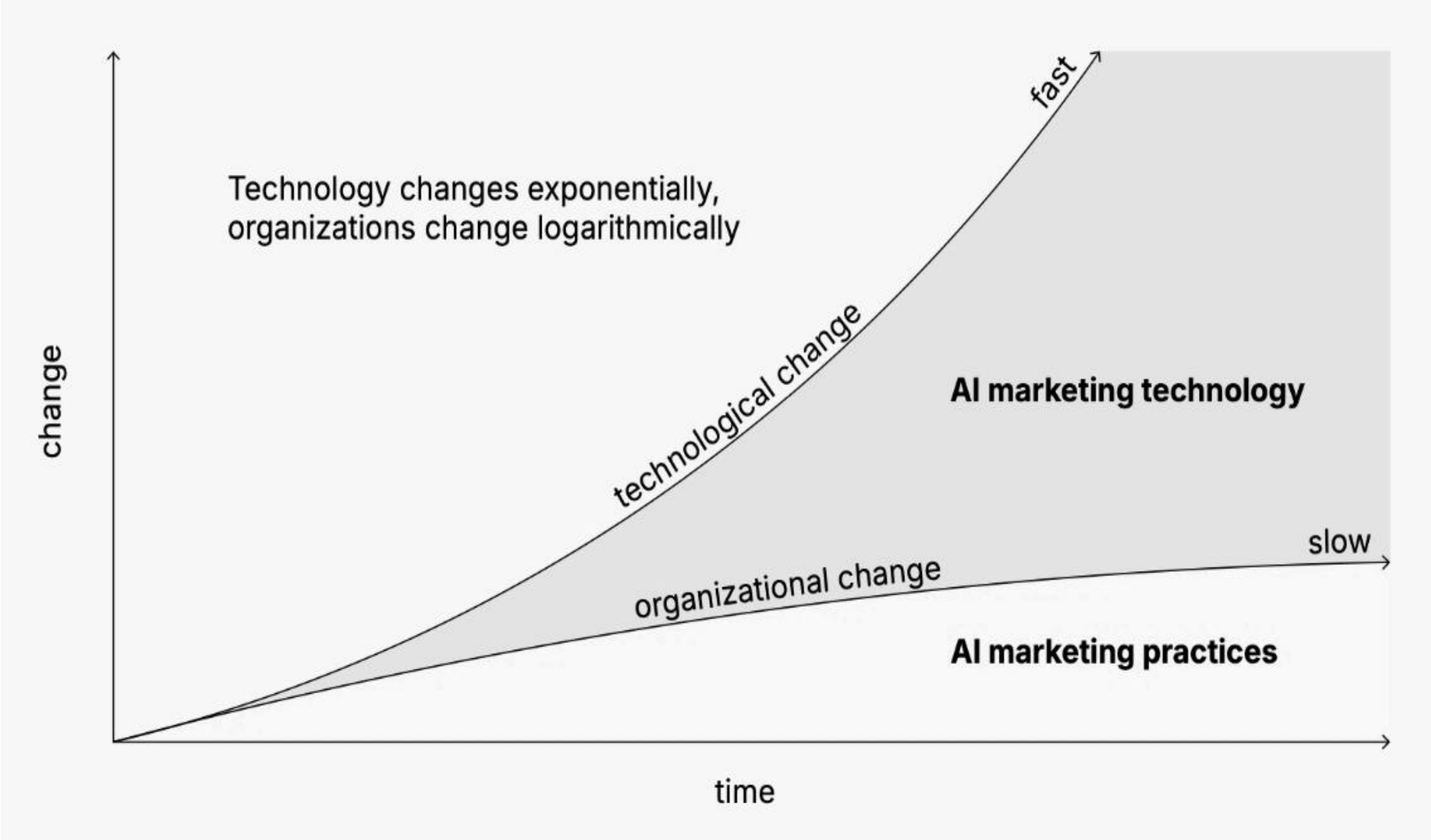




# The situation „on field“

Marketing infrastructure capacities are far ahead and developing much faster than organisations’ capabilities.

AI is changing marketing and MarTech, and fast. We should ride this wave and find ways to make the best of the great opportunities it brings.



“If AI development stopped today (and no indication that is happening), we have a couple of decades of figuring out how to integrate it into work, education, & life.”

**Ethan Mollick, PhD**  
Author of “Co-Intelligence: Living and Working with AI”

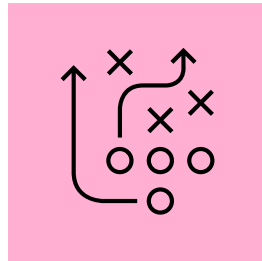
85%

of executives believe that by 2026, their workforce will make real-time, data-driven decisions using AI agent recommendations. These decisions will span the entire customer journey, from segmentation and targeting to ongoing relationship management.

# „We have everything, but the expected change is not happening!“

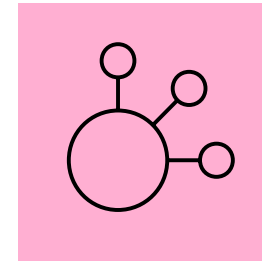
Which issues prevent a customer-oriented transformation?

## Pushing customers to planned journeys



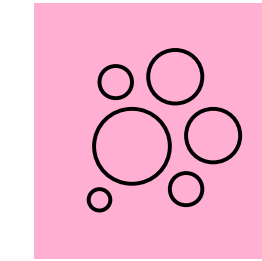
- Most companies manage marketing automation through predefined campaigns, triggered according to their fixed schedules. Customers are not aware of such schedules.
- **Linear customer journeys are a thing of the past.** Companies that follow a rigid campaign logic in their communication management often react too late or with misplaced messages.

## Data is here, but left unused



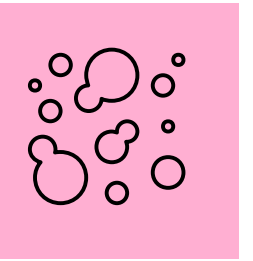
- The hype around collecting customer data has led to companies having a wealth of data at their disposal, yet still failing. This time, not because of a lack of data, but because of its **inadequate integration into decision-making processes**.
- Without a clear strategy for leveraging available customer signals, data-driven engagement remains a mere phrase.

## Hard money shift is not fuelling change

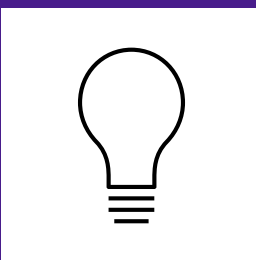


- With millions still being invested in traditional campaigns, there is often a lack of resources for developing long-term, data-driven engagement strategies, testing and learning.
- Companies still **prioritise mass campaigns and short-term KPIs** over sustainable customer relationships.

## Collaboration is not honest



- In many companies, we still have separate teams for CRM, website, social media and email marketing. This makes it difficult to utilise customer data holistically and design a cross-channel customer journey.
- **KPIs are not unified and collaboration is situational.** This not only creates organisational friction, but also a distorted picture of customer interactions and needs.



**Result:** a fragmented customer journey, inefficient data utilisation and a suboptimal customer experience.  
**The price to pay:** loyalty decrease and revenue loss.

# Unlocking brand-new experiences

From business-driven automation  
to customer centricity

### 3 pillars of marketing automation: The groundwork for your AI boost

How to shift from pre-defined sequences towards dynamic experiences

## Data is here.

- The opportunity for us: Modern customers gather information, interact and engage with brands in dynamic, fragmented, channel-hopping ways.
- They leave a wealth of data, often happily, but expect something in return. However, marketers cannot keep up with all these signals, behaviours and channels.
- Technology has to support.

## Technology is here.

- Real-time engagement features in modern automation solutions open up new possibilities. We have the right tools and the capability to leverage available data and shape better experiences for customers and employees.
- AI can help orchestrate journeys with greater precision, enhancing CX, customer satisfaction and loyalty.
- Strategy needs to leverage it.

## Strategy? Is struggling.

- Even with abundant data and advanced technology, strategic realignment still often lacks. A shift in mindset and corresponding strategies is needed: the task is to implement and leverage these advanced opportunities.
- It needs a clear strategy, decisions and actions to connect and utilise data and automate it specifically for relevant customer interactions.

### 3 marketing automation core capabilities to enable the AI boost

How to shift from pre-defined sequences towards dynamic automation

These capabilities are not only features and tools, but also relate to business values and objectives. Interactions should not only be timely, but also resonate deeply with the customer, thereby driving loyalty and maximising business value.

**The role of AI** is to drive a deeper understanding of customers, offer real-time decision support, enable true multi-channel marketing and continuous learning and optimisation.

## Real-time responsiveness

Strategic realignment and commitment is required to identify and react to customers' needs even before they explicitly express them.

## Multi-channel experience

Technology and organisational efforts working hand in hand to drive seamless cross-channel interaction at scale.

## Strategic data integration

Use of customer signals (identified, structured, and governed data) to react with relevant offers and communication.



# Orchestrating customer journeys together with humans

## How AI can help



## Marketing workflows reshaped by AI

### Personalised communication at scale in the third wave of AI



Marketing automation journey orchestration involves **multiple critical decision-plus-action points**. In business reality, where marketers should oversee multiple, overlapping campaigns and event-triggered journeys, it is hard to retain **true insight and control at every stage**.

Intelligent AI workflows can examine millions of audience members, analyse customer journeys of similar individuals and help marketers determine their next move.

**AI is here not to replace, but to work alongside humans.**

While marketers go about their day, AI-powered models work alongside them, crunching through customer performance data to anticipate not only customers' habits and preferences, but also their motivations at any given moment and how they prefer to engage.



# Strategies to nurture customers and increase productivity

Marketing use cases enhanced by AI capabilities

<p>The capabilities of advanced AI technology are vast, enabling numerous use cases that drive customer engagement, enhance retention, and boost overall business performance.</p>	<p><b>Predictive analysis for customer intent</b></p> <ul style="list-style-type: none"><li>– AI identifies patterns and behaviours indicative of churn or purchase intent</li><li>– anticipate customer needs before they arise</li></ul>	<p><b>Persona creation and real-time segmentation</b></p> <ul style="list-style-type: none"><li>– dynamic approach to reflect the ongoing changes</li><li>– AI adapts organically, not limited by fixed attributes</li></ul>	<p><b>Dynamic actions using native data</b></p> <ul style="list-style-type: none"><li>– real-time journey adjustment based on engagement within the flow</li><li>– each interaction contributes positively to the overall UX</li></ul>
<p><b>Real-time feedback response</b></p> <ul style="list-style-type: none"><li>– AI-powered tools analyse customer feedback in real-time</li><li>– AI agents drive changes in timing, channel or content of subsequent communications</li></ul>	<p><b>Dynamic channel preference</b></p> <ul style="list-style-type: none"><li>– AI identifies and adapts journeys to customers' preferred communication channels</li><li>– optimized UX, minimised operational costs</li></ul>	<p><b>Intent-triggered journeys</b></p> <ul style="list-style-type: none"><li>– leveraging signals of intent allows for 'right-on-time' action</li><li>– AI can detect and initiate a customer journey to improve CR and churn rate</li></ul>	<p><b>Performance and visualisation</b></p> <ul style="list-style-type: none"><li>– native-language prompts to AI agents for insights on recent campaigns</li><li>– Personalised dashboards for different management levels</li></ul>

## B2B marketing use cases enhanced by AI capabilities

In B2B, AI-enabled marketing automation offers additional opportunities for better productivity and marketing-sales collaboration.



### Real-time lead scoring

- AI can score your leads in real-time
- relevant information transmitted instantly to improve conversion rates and interaction relevance
- dynamic lead management appreciated by sales teams
- organisational buy-in for marketing investments

### High-value prospects and predictive action

- AI to synchronise sales and marketing efforts
- identify high-potential prospects to prioritise resources effectively
- anticipating customer needs and proactively engaging as USP in B2B
- understanding and proactiveness to enhance customer loyalty

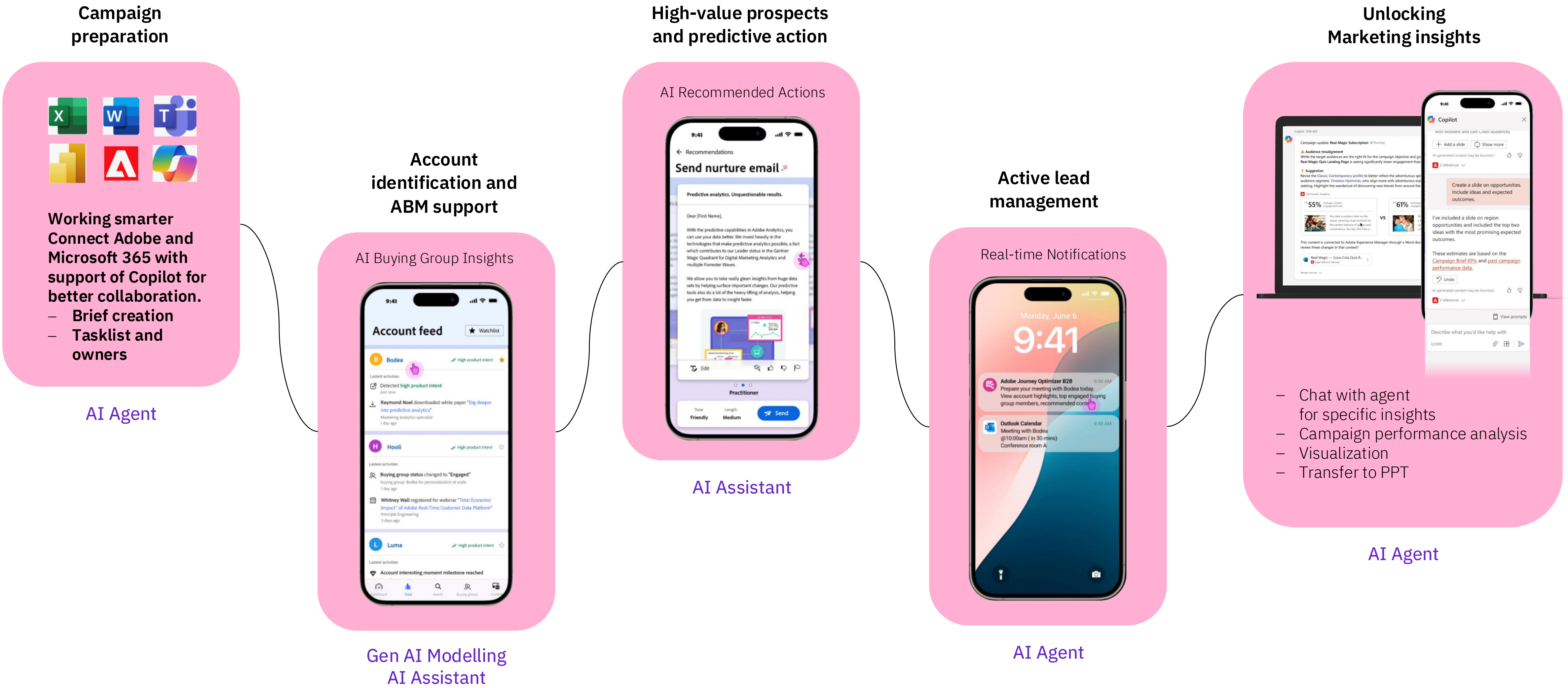
### Account identification and ABM support

- AI models analyse large amounts of customer data
- identify buyer groups within accounts
- key stakeholders for each communication
- agentic AI to personalise marketing content and orchestrate multi-channel campaigns



# Inspiration

B2B marketing workflow enhanced by AI capabilities

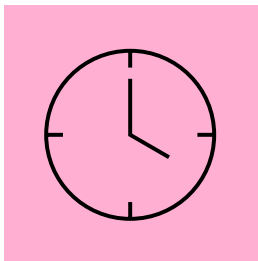


# Operational levers

Journey orchestration with AI as your sparring partner

Get inspired by AI features  
shaping customer-centric  
experiences

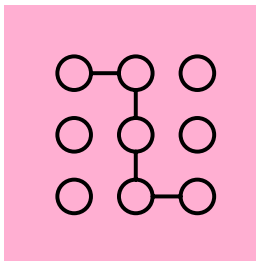
## Timing



AI can optimise the timing of communications by analysing typical customer activity and preferences to send marketing messages when they are most likely to engage.

Use AI to determine the optimal deployment time of an email campaign to a specific customer, increasing the likelihood of high open and click-through rates.

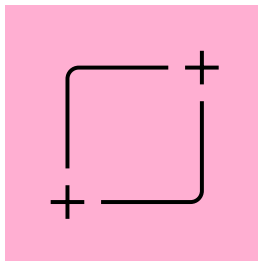
## Journey steps



AI can adapt the sequence of steps in a customer journey based on real-time customer interactions.

In a B2B context, if a prospect downloads a whitepaper, AI might push them to the next step—a sales call—earlier than usual if it detects high engagement with other content.

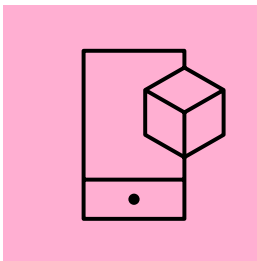
## Entry and Exit criteria



AI can track performance and determine the best criteria and thresholds to include or exclude segments from a particular journey.

In a retention campaign, AI might identify a customer showing signs of disengagement (e.g., decreased product usage) and automatically add them to a re-engagement journey.

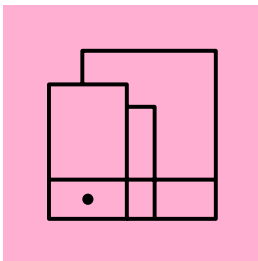
## Multiple campaigns



AI can optimise customer journeys by learning from performance data and adjusting so that the customer does not get caught in a "campaign crossfire".

AI analyses the audience qualifying for multiple campaigns at the same time. It can determine the best option for specific customers to prevent redundant communications.

## Channels



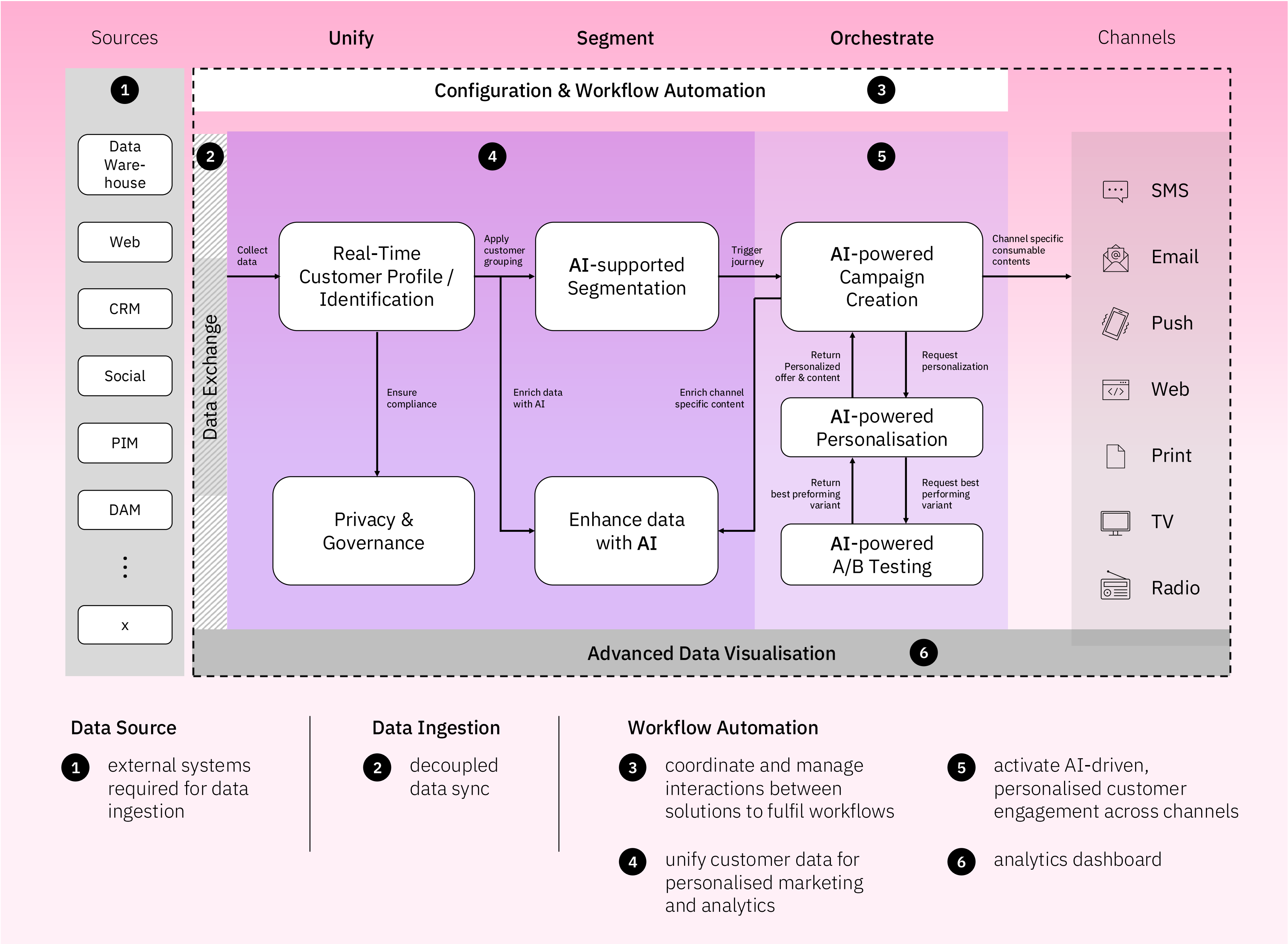
AI can determine the most effective communication channels for each customer.

In a multi-channel campaign, AI could identify that a customer prefers email communication to text messages and automatically route subsequent messages to their email.

Campaign insights, reporting and self-optimisation



AI enables journey orchestration by enhancing various process steps in the stack



# Let's look at some examples

Agentic AI: autonomous decision-making in marketing

AI systems can independently run campaigns, adjust budgets and personalise interactions using real-time data. Unlike rule-based tools, they employ reinforcement learning to self-optimize.

## Which AI solutions do our technology partners offer?

- Adobe GenStudio: personalised campaign content for your target personas, products, and more.
- Salesforce Agentforce: hyper-personalised marketing campaigns at scale
- Microsoft 365 Copilot: campaign briefs, meeting summaries and reports
- IBM Watson Orchestrate: multi-AI workflows for campaign execution

## Real-life examples



Client contact management for faster and targeted customer engagement across different touchpoints.

[Learn more](#)



Consumer experience innovation for hyper-personalised marketing and stronger direct-to-consumer connections.

[Learn more](#)



AI-supported customer engagement including in-car MBUX Virtual Assistant.

[Learn more](#)



Action Guide

From input to impact:  
transforming valuable data  
into real-time experiences

How to start your AI journey



Now

Define goals and scale  
what works

- set goals and priorities
- leverage high-impact cases
- start small, but smart
- integrate predictive AI and assistants before piloting AI agents
- dedicated agile team to try out and learn

Next

Build a strong, trusted  
data foundation

- invest in reliable data
- be compliant and transparent about AI models and data usage
- support a 360-degree customer view
- do not underestimate complexity
- prioritise scalable systems and strategies

Soon

Drive an agile culture  
focused on learning

- empower your team
- prioritise speed, flexibility and continual iteration
- promote a culture of experimentation
- actively manage organisational change
- evolve and adapt together with AI



## The takeaway

In essence, the journey towards AI-enabled marketing automation orchestration is one of strategic metamorphosis.

By moving from static, scheduled campaigns to dynamic, data-driven, AI-orchestrated customer journeys, businesses can effectively bridge the gap between business-driven automation and genuine customer centricity. AI can support this change and make it sustainable.

Ultimately, remember that this transformation is not just a technological endeavour, but a cultural shift that prioritises customer experiences and building long-term relationships over immediate returns.

The journey may be challenging, but the potential benefits make it an essential goal for any forward-thinking organisation.





What are you waiting for?  
Let's get started together.

Let's discuss how to start preparing today.  
Get in touch directly or write us at: [contact@ibmix.de](mailto:contact@ibmix.de)

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