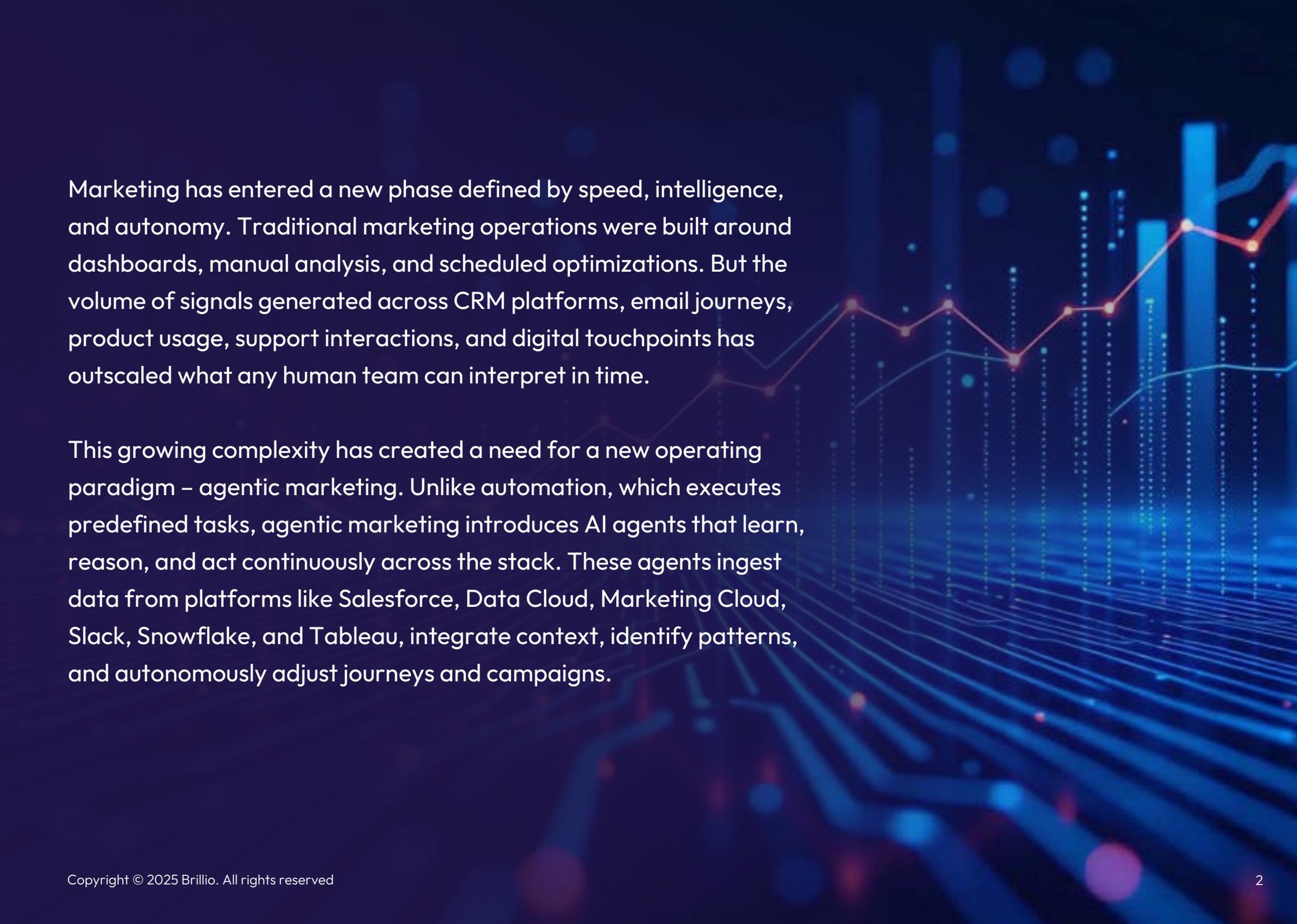# Reinventing Marketing in the Age of AI.
How Agentic Intelligence Redefines Performance

brillio

Marketing has entered a new phase defined by speed, intelligence, and autonomy. Traditional marketing operations were built around dashboards, manual analysis, and scheduled optimizations. But the volume of signals generated across CRM platforms, email journeys, product usage, support interactions, and digital touchpoints has outscaled what any human team can interpret in time.

This growing complexity has created a need for a new operating paradigm – agentic marketing. Unlike automation, which executes predefined tasks, agentic marketing introduces AI agents that learn, reason, and act continuously across the stack. These agents ingest data from platforms like Salesforce, Data Cloud, Marketing Cloud, Slack, Snowflake, and Tableau, integrate context, identify patterns, and autonomously adjust journeys and campaigns.

The Core Challenge: Fragmentation, Manual Work, and Technical Debt

Marketing data lives in multiple systems, each with different retention windows, access constraints, and levels of completeness. Marketing Cloud provides operational execution but limited historical depth. Snowflake stores richer datasets but requires harmonization. Tableau dashboards exist, but many are disconnected, inconsistent, or difficult to maintain due to underlying ingestion issues.

Analysts spend meaningful time reconciling definitions, accessing the right datasets, and resolving inconsistencies in performance, campaign-level tracking, and ingestion reliability. Visualizations are often delayed because of gaps in underlying data and limited visualization capacity.

Subscriber/customer visibility is another challenge: access constraints and retention limits restrict how confidently teams can analyze behavior over time. This limits the accuracy of performance interpretation and complicates efforts to compare results across campaigns and time periods.

These issues create an environment where marketing teams work hard but spend too much time fixing data, validating dashboards, and reconciling fragmented views – instead of using insights to optimize performance.

Brillio's Agentic Marketing Framework

Brillio's approach to agentic marketing transforms the marketing function into a self-improving system – where insights become action, action becomes learning, and learning improves performance. This is how modern enterprises deliver personalization at scale, reduce operational friction, and unlock new levels of marketing performance.

To move from fragmented workflows to an intelligent, autonomous marketing engine, Brillio follows a four-pillar framework:

1. Building a Unified Data Platform

Brillio strengthens the marketing data foundation by standardizing how performance is defined and ensuring that key datasets flow into Snowflake for longer-term visibility. This resolves retention constraints within Marketing Cloud and provides a stable, consistent source of truth for reporting.

2. Enhancing Analytics and Insights

With foundational alignment in place, Brillio improves how performance is analyzed. UTM-based tracking provides clearer attribution, and Tableau dashboards offer multi-dimensional views of campaign activity, comparisons across time ranges, anomaly detection, and richer insights into engagement patterns.
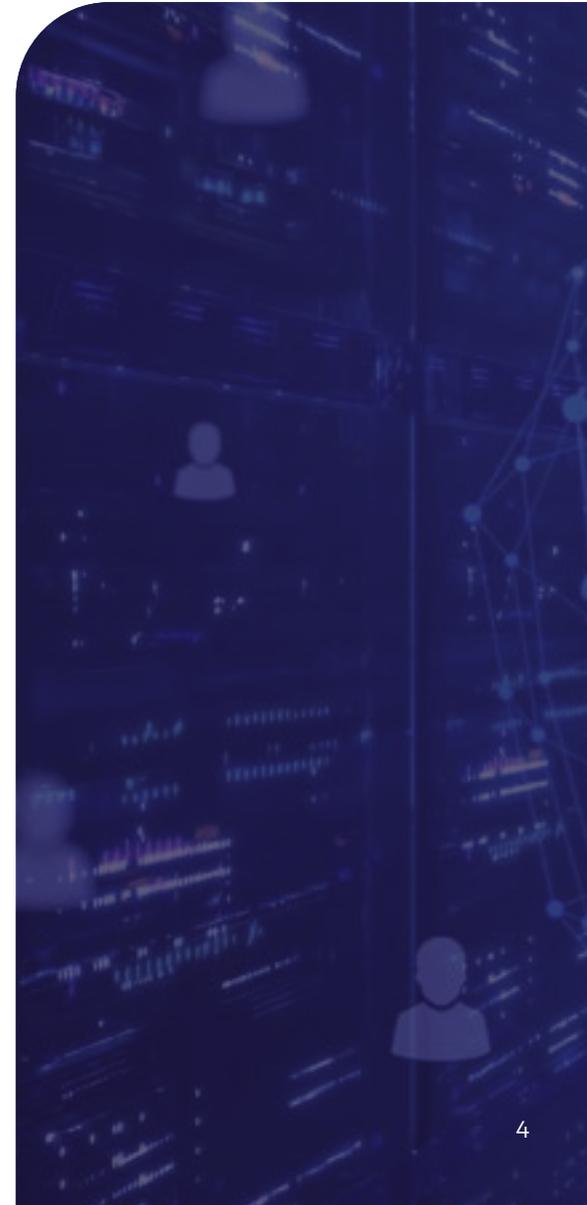
3. Strengthening Subscriber & Customer View

Brillio improves how subscriber behavior and engagement data are accessed and interpreted within Marketing Cloud. By addressing historical and access limitations, teams gain a clearer view of subscriber interactions over time.

4. Addressing Dependencies, Fixes & Technical Debt

Brillio resolves multiple foundational issues that hinder analytics reliability and dashboard accuracy. This includes stabilizing ingestion processes, addressing issues such as subject line reporting inconsistencies, clarifying campaign-level data flows, and mitigating retention-driven data loss.

Brillio's Execution Journey: From Design to Scale

Transforming a traditional marketing operation into an agentic, intelligence-driven ecosystem requires more than technology – it requires a structured path that moves organizations from fragmented data and manual workflows to continuous, AI-assisted decision-making. Brillio's execution approach is built to deliver exactly that.

Rather than deploying isolated tools or one-off optimizations, Brillio orchestrates a step-by-step journey that aligns teams, stabilizes the data foundation, implements advanced analytics, and gradually introduces AI-powered automation where it creates the most measurable impact. Each phase builds on the last, ensuring that the transformation is not only successful at go-live but continues to scale and mature in the weeks that follow.

Discovery & Assessment

Brillio engages with marketing, CRM, and analytics teams to map existing data landscapes, identify bottlenecks, and align on key business goals. Workshops uncover journey triggers, retention levers, churn signals, and upsell behaviors. The result is a unified understanding of objectives and KPIs.

Solution Design

Brillio architects a unified data model that merges Salesforce, Service Cloud, product usage metrics, and Marketing Cloud. Journey blueprints are created for onboarding, engagement, personalization, and upgrades. Predictive model requirements are defined across churn, engagement scoring, journey segmentation, and product analytics.

Build & Configuration

Engineering teams configure connectors, ingestion workflows, marketing journeys, and AI models. Product analytics dashboards and predictive scoring engines are deployed. Agentforce automations begin orchestrating tasks like data quality checks, content updates, and campaign adjustments.

Testing & UAT

Every journey, trigger, dashboard, and model is validated for accuracy, compliance, and business fit. Stakeholders review scenarios end-to-end, ensuring confidence before go-live.

Deployment & Enablement

Agentforce, Salesforce, and Marketing Cloud environments are activated. Teams receive role-based training, performance dashboards are installed, and monitoring routines are configured.

Optimization & Scale

With the system live, Brillio enhances AI models, adds cross-channel journeys, scales personalization, and embeds continuous feedback loops between marketing and product teams.

Agentic Use Cases: Intelligence in Action

Agentic marketing only becomes meaningful when intelligence translates into real outcomes. The true value emerges when AI can analyze signals in real time, surface insights with context, and activate changes that improve engagement, retention, and overall performance.

## Agentic Use Cases: Intelligence in Action

Across the marketing landscape – from campaign behavior to product interaction patterns – there are countless micro-decisions waiting to be automated, optimized, or completely re-imagined through AI. Brillio brings these opportunities to life through a set of concrete agentic use cases that demonstrate how intelligence enhances visibility, improves targeting, and drives measurable business value.

Intelligence That Elevates Marketing Performance

Audience & Behavior Intelligence

Feature Adoption Tracking
AI ingests usage and interaction signals through Snowflake, normalizes them into feature-level metrics, and explains why behavior rises or declines across audience segments. This helps teams identify friction points, refine messaging, and trigger targeted nudges.
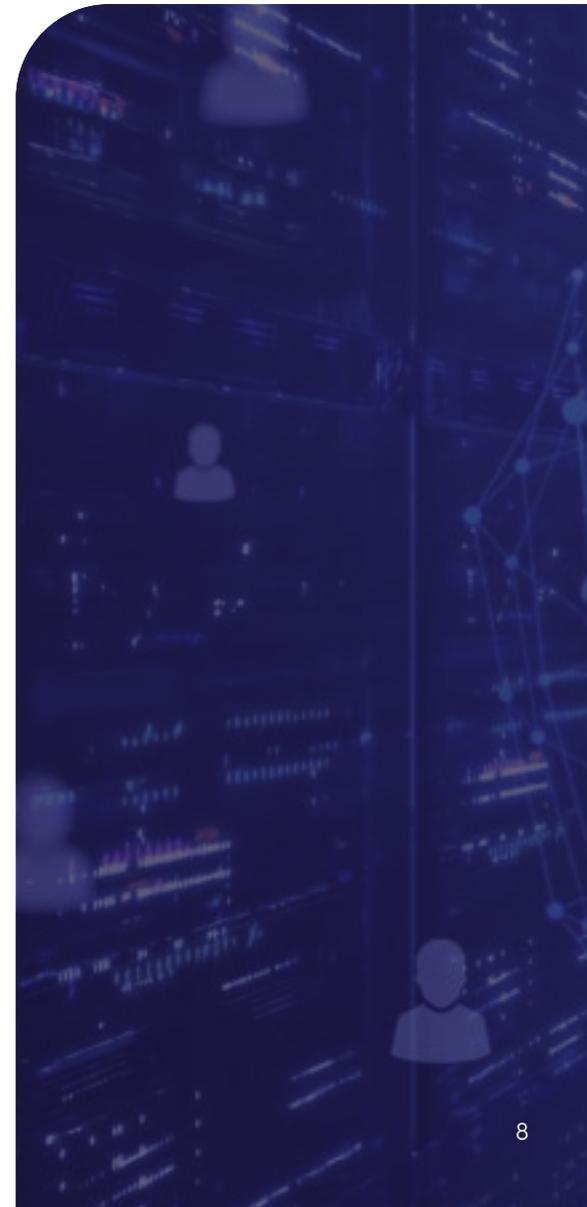
Customer Churn Prediction

Combined CRM and behavioral datasets feed churn models that proactively surface at-risk customers. Agentforce alerts teams with recommended actions, helping reduce churn and improve Net Revenue Retention.

Journey & Funnel Intelligence

Conversion Funnel Optimization

AI analyzes drop-offs across trial, onboarding, paid conversion, and upsell journeys. Tableau visualizations enriched with Agentforce insights highlight which steps require intervention – often driving conversion improvements of 10–15%.

Usage-Based Billing Forecasting

Forecasting models project consumption patterns, helping teams anticipate renewal risks or upsell opportunities. When customers near usage limits, AI recommends timely outreach to prevent revenue leakage and improve satisfaction.

Campaign & Engagement Intelligence

AI-Driven Campaign Performance Insights

Agentforce provides conversational analysis on campaign performance – identifying top conversion drivers, surfacing underperforming subject lines, and recommending optimal send times.

Predictive Engagement Scoring

Models trained on Snowflake data estimate the likelihood of customer engagement, enabling dynamic targeting that reduces unsubscribes and increases relevance.

Automated Anomaly Detection & Alerts

AI monitors engagement baselines in real time – detecting CTR drops, bounce spikes, and delivery issues – and instantly alerts teams via Slack or Teams.

Revenue Intelligence

Revenue Attribution for Campaigns

Engagement data – including email, web interactions, and product signals – merges with Sales Cloud opportunities to reveal which campaigns influence pipeline and revenue through multi-touch attribution.
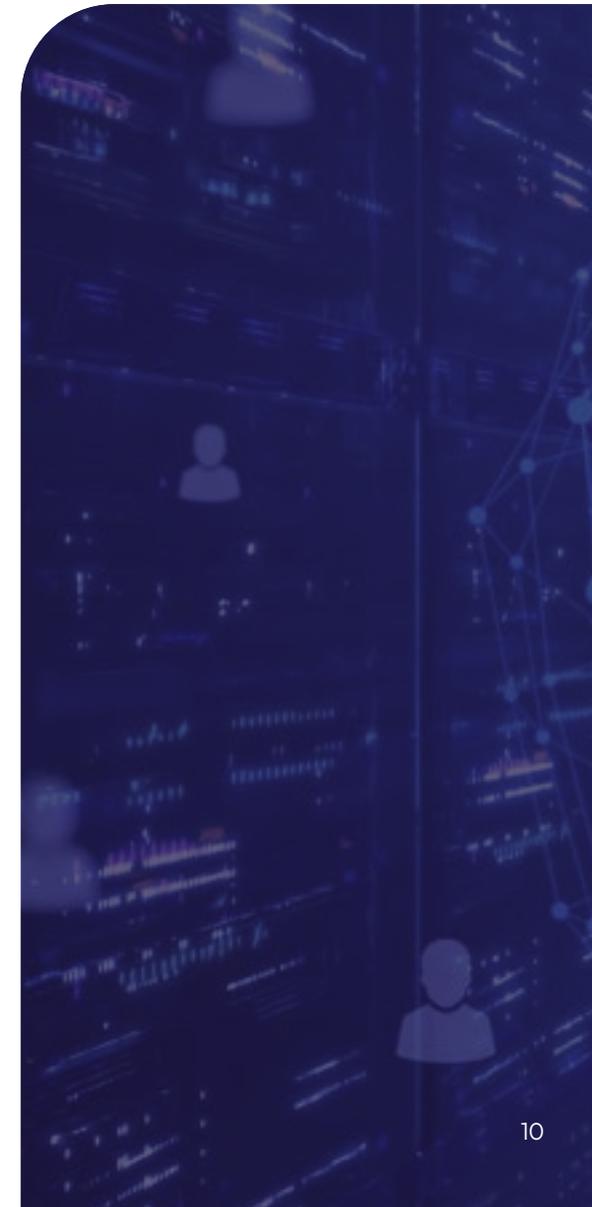
Agentic Architecture: The Brain Behind the Marketing Engine

Modern marketing operations rely on fast-moving data, consistent intelligence, and the ability to turn signals into targeted, measurable action. Yet for many organizations, the operational backbone behind campaigns remains deeply manual. Teams still configure campaigns by hand, reconcile fragmented datasets, and struggle with dashboards that don't reflect real-time performance. The result is a system that works – but slowly, with high effort, and at the cost of meaningful profitability.

Brillio reimagines this landscape through an agentic, AI-led architecture powered by Salesforce DET, Agentforce, Cortex, Einstein, Slackforce, and MCP. It shows the shift from manual, error-prone workflows to a self-orchestrated, autonomous marketing system where agents coordinate data ingestion, transformation, analysis, activation, and continuous optimization.

The Before State: Manual, Siloed, and Difficult to Scale

In the traditional setup, marketing teams rely on heavy operational involvement at every step.

Marketers manually create and update campaigns, configure contact lists and customer groups, and schedule audience pushes. Data ingestion is equally labor-intensive – teams handcraft ingestion jobs from Salesforce Marketing Cloud, S3, and Snowflake, relying on staging and parsing layers managed manually.

Once data lands, the transformation layer becomes another bottleneck. Analysts spend significant time cleansing data, reconciling schemas, and preparing it for KPI reporting, audience scoring, and dashboarding.

Dashboards multiply as teams try to keep up with daily reporting needs. Missed KPIs, inconsistent datasets, and misaligned metrics are frequent pain points. Ultimately, marketing operations deliver value, but at the cost of heavy human involvement, slower cycles, and lower profitability.

The Reinvented Process: Agentic Intelligence Orchestrating Every Step

Brillio completely overhauls the process to a fully agent-assisted flow, where autonomous agents handle ingestion, transformation, harmonization, and analytics.

A Salesforce Agent collaborates with Cortex Snowflake Agents to manage data ingestion from SFMC, S3, and Snowflake. Instead of writing pipelines or troubleshooting processes, the agent simply generates the new ingestion and transformation layer as needed. If an error is detected, the agent instantly feeds that insight back to the originating agent, closing the loop without human escalation.

The next stage introduces the Golden Layer in Data Cloud and Tableau. An agent constructs this unified analytical layer, ensuring harmonized metrics, consistent KPI definitions, and seamless traceability back to the source data. From here, the agentic system handles visualization, optimization, and continuous feedback.

The After State: A Self-Optimizing, AI-Led Marketing Ecosystem

Once the agentic intelligence has orchestrated the foundational data layers, the entire operating model for the marketing team transforms. In the transformed environment, the marketer's role shifts from operator to strategist.

Campaign processes become one-time or personalized: agents create, update, or adjust campaigns autonomously based on rules, signals, and preferences. Data ingestion and storage pipelines are generated,
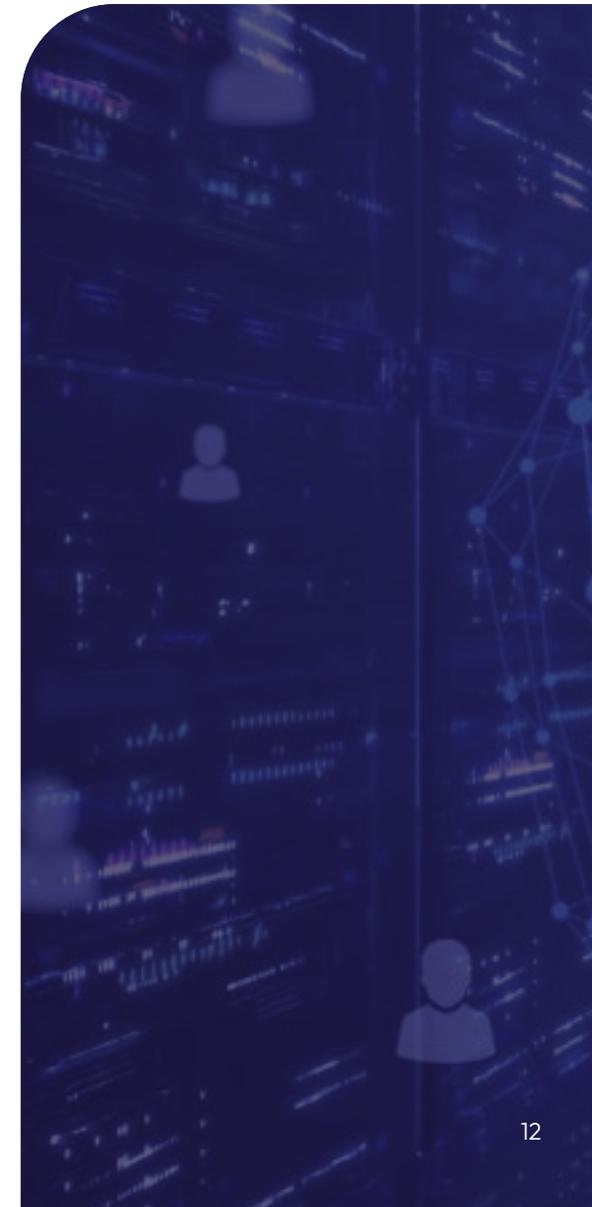
validated, and monitored automatically. Transformation and harmonization are handled by AI, producing consistent KPIs, clear attribution visibility, and error-free schemas.

Einstein's analytics layer expands the system's intelligence – running pipelines, surfacing anomalies, recommending actions, and enabling auto-remediation. Insights flow directly, ensuring every team member operates with real-time clarity.

Visualization and optimization become continuous. Agents push insights directly into marketing workflows, enabling faster experimentation, improved segmentation, and more profitable campaign decisions.

The result is a marketing organization that works faster, with fewer manual touches, and with significantly higher profitability, powered by seamless automation across products and platforms.

The Intelligent Marketing Organization

Agentic marketing is not a future concept – it's an emerging operational standard. By unifying data, applying advanced analytics, integrating predictive models, and empowering autonomous agents across campaigns, enterprises unlock a self-improving marketing engine.

Brillio's architecture, delivery model, and Agentforce expertise help organizations achieve this quickly, safely, and at scale. In an era where speed and relevance determine market leadership, agentic marketing offers the clearest path to outperforming competitors and exceeding customer expectations.

ABOUT BRILLIO

Brillio is a digital technology services company that drives AI-first engineering and design-led experiences for global enterprises. Born digital in 2014, its consulting-led services span Customer Experience, Data & AI, Product Engineering, and Digital Infrastructure. With an industry-leading NPS of 71, Brillio accelerates time to market through its proprietary BrillioOne.ai platform, powered by AI-ready talent with deep domain expertise. Brillio is the official Digital Transformation Partner and the official Data and AI Services Provider of Atlassian Williams Racing. Brillio partners with leading technology providers including Microsoft, AWS, Google Cloud, Salesforce, Adobe, Databricks, and Snowflake and operates with 6,000+ "Brillians" across 15 global delivery centers. Consistently recognized as a Great Place to Work® since 2021, Brillio blends innovation, talent, and purpose to deliver measurable outcomes for clients and fulfilling careers for employees.

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