MERKLE

The Agentic AI Playbook

How to Build Smarter Automated Experiences

The next era of marketing is already taking shape—and it's more exciting than we imagined.

Picture a world just a few years from now. Personalized experiences that shift in real time. AI agents so fluent and humanlike, you'll forget you're not talking to a person. Consumers relying on their own digital agents to manage purchases, switch providers, and filter messages. Brands doing the same.

This isn't a leap. The building blocks are already here. AI, real-time data, automation, and identity management are advancing so fast that most teams can't keep up. What's coming is not just smarter tools, but systems that can think and act on their own, and with each other.

It's a thrilling shift. But it's also a challenge.

Because while the potential is enormous, the path forward can feel unclear. Where do you start? What's hype, and what's real? How do you move from experiments to value at scale?

We'll explore the first steps toward an agentic future: where to focus, what to build, and how to prepare your team for a world where agents no longer just assist—they act.

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Understand the Agentic AI Landscape

What are agents?

Agents combine the power of generative AI, chatbots, and inputs such as text, images, and video to act autonomously on behalf of a user or business.

Before we jump into the agentic future, let's ground ourselves in **the agentic present**.

Think of agents as digital workers. They pursue defined goals without constant human intervention, and are self-learning and self-correcting.

Agents work independently to perform specific tasks such as data analysis or content creation. Those agents can also team up to handle more complex, cross-functional tasks. This is referred to as "agentic AI."

Here's an example of what an agentic-enhanced experience could look like:

1. **A user browses a hotel's website.** The CDP logs this interest and user profile data then shares it with AI.

2. **Upon leaving, the AI dynamically generates and places a personalized retargeting ad** that highlights specific hotel features relevant to the user's browsing pattern or past purchases.

3. **When the user returns, the website instantly adapts,** displaying a personalized banner or offer related to their interest.

4. **The user starts the booking process but leaves.** The AI analyzes the user's value, package details, and behavior to determine the best intervention.

5. **Instead of a generic email, the AI crafts a personalized abandon cart message.** It may mention the specific property, offer relevant upgrades, or provide a tailored incentive based on predicted price sensitivity. The message is delivered via the optimal channel — whether that's email, push notification, or SMS — at the most opportune moment.

6. **The AI continues to monitor engagement and adapts** follow-up actions based on user response or inaction.

In this use case, agents connect marketing and ecommerce interactions to build better, efficient, and more autonomous customer experiences.

This level of adaptive experience technically is possible today, and leaders are excited for agentic AI's potential. But are they ready to implement it?

Many companies are still getting their **tech and data infrastructure** in order.

The agentic AI use cases that make the biggest splash tend to be the most complex. But for most companies, they're not yet achievable. The gap between where their data and tech infrastructures are now, and where they need to be, is still too wide.

Only 51% of organizations report having data that's rich and accessible to all teams. Sixty-nine percent of companies cite inadequate or disconnected technology as a major challenge to digital transformation. These are huge issues that can feel insurmountable and lead to inaction.

Companies often want to go big, without realizing that starting small is the smartest way to get there. A simpler use case gives companies a lower-stakes environment to test and learn. It gets teams familiar with new workflows, and highlights data gaps to fill before investing in something bigger, all while adding value to the organization.

But the first step in any AI agent implementation, big or small, is to figure out why and how you want to use it.

To what extent are the following factors preventing you from successfully executing your digital transformation initiatives?

Inadequate or disconnected technology systems or infrastructure

This is a major challenge	22%
This is a minor challenge	47%
This is not a problem	31%

Please indicate how each of the following data transformation capabilities ranks in terms of priority for your organization.

Our organization's data is rich and accessible by all teams, and we are making the most of customer and business insights

This was a high priority for us and we achieved it	51%
This is a high priority for us, but we have yet to achieve it	42%
This is a nice-to-have for us	7%

Design Agentic AI for the Real World

AI agent success starts with the right use case.

That means defining the need you wish to meet, how you'll judge success, and the steps that will get you there. We've compiled some do's and don'ts as a starting point. While there are always exceptions, these are patterns we see across industries.

DO:

✓ **Consider internal use cases to gain momentum.** Though not as splashy, internal agents add value without the risk of a poor customer experience.

✓ **Define KPIs early.** Know what success looks like for your particular use case so you can judge it fairly. This grounds expectations for stakeholders across the business.

✓ **Use a framework to find use cases that align with your organization and its customers.** You can find one that we've developed [here](#).

DON'T:

⊗ **Start with automating complex or emotional moments.** Customer loyalty can be won—but more often lost—in highly emotional interactions. Don't entrust AI agents with those precious touchpoints until you have other agent experiences under your belt.

Need inspiration for use cases that build momentum?

Here are just a few of the ways we've seen clients start with AI agents to gain efficiency while improving customer engagement:

- **Audience management:** Analyze customer behaviors to create and activate new audiences across various channels.

- **Analytics:** Summarize performance across campaigns, identify insights, and take action based on those findings.

- **Content:** Improve workflows across the supply chain in areas such as briefing and content generation.

- **Email:** Generate new content, optimize send times, and enhance subject lines based on performance.

Consumers still prefer humans
in certain interactions.

It's tempting to automate as much as possible, but don't go too far when you use AI agents for customer interactions. Our research found that companies overestimate consumers' preferences for digital experiences. There is still a strong desire for human interaction, especially when it comes to complex purchase processes and customer service.

This doesn't mean that AI has no place in these areas. It just means that you need to take extra care to strike the right balance between AI-based and people-based help. Agents and humans can work in harmony to deliver experiences that make the customer feel valued.

As perceptions change and consumers become more comfortable with AI, agents can play more of a starring role. And remember that your unique customer base may be ready for AI sooner than the average consumer in your industry.

Take B2B: a space full of complexity. Buyers and sellers want more efficient procurement processes. This creates more demand for automation, and an opportunity for B2B to lead B2C with AI agents.

JOURNEY STAGE	INDUSTRIES							
	Retail & CPG	Tech & Telecom	Media & Entertainment	Travel & Hospitality	Auto & Mfg.	FinServ & Insurance	Healthcare	Nonprofit
Researching	More Human (+6%)	More Digital (+16%)	More Digital (+21%)	Equal Split (+/-5%)	More Digital (+11%)	More Digital (+7%)	More Human (+19%)	Equal Split (+/-5%)
Evaluating / Selecting	More Human (+13%)	More Digital (+20%)	More Digital (+12%)	Equal Split (+/-5%)	Equal Split (+/-5%)	Equal Split (+/-5%)	More Human (+21%)	Equal Split (+/-5%)
Purchasing	More Human (+21%)	Equal Split (+/-5%)	Equal Split (+/-5%)	More Human (+17%)	More Human (+20%)	Equal Split (+/-5%)	More Human (+27%)	More Human (+13%)
Paying	More Human (+7%)	More Digital (+30%)	More Digital (+31%)	More Digital (+8%)	More Digital (+11%)	More Digital (+28%)	Equal Split (+/-5%)	More Digital (+10%)
Requesting Support	More Human (+42%)	More Human (+34%)	More Human (+32%)	More Human (+44%)	More Human (+21%)	More Human (+38%)	More Human (+48%)	More Human (+42%)

■ Digital Experiences Strongly Preferred (+20% or more)   ■ Human Experiences Strongly Preferred (+20% or more)

Design pathways that **plan for human intervention**.

Since many consumers still want that personal touch, marketing leaders must design for humans and AI, especially when the use case is customer facing. A helpful agent might answer questions faster, but empathy and reassurance still belong to people. Knowing when it's time to reroute to a human (and how) preserves the trust you've worked so hard to build.

- **Design for the handoff:** Blended experiences work best when transitions feel intentional. Give customers visibility into what's happening. Tell them when a person is stepping in, and why. Then back that promise with a clear process: Who will respond? When? What kind of help can they provide?

- **Know when to escalate:** Every interaction should come with clear rules for when and how to hand off to a person. Delay or confusion at this point frustrates customers. Define escalation triggers up front. Is the agent struggling to resolve the issue in three turns? Does the customer use certain phrases that suggest urgency or emotion? Route accordingly.

- **Provide clarity for the business:** Escalation should never be a free-for-all. Define service levels, team responsibilities, and routing logic early.

- **Test and optimize:** Make sure the handoff is working as expected. Are customers satisfied in their post-support surveys? Are interactions getting longer or shorter? Monitor success through analytics and make changes when a process isn't driving the desired results.

# See how **agents and humans** can work in harmony.

Meet Susan. She needs a dress for her son's college graduation. Casual online searches haven't turned up much.

01. After clicking an Instagram post from a luxury retailer, an AI-powered style agent greets her. It asks a few quick questions—occasion, fit, budget—and curates a shortlist based on her taste, size, and browsing history.

02. Susan saves a few options but hesitates. The AI notices and offers to book a styling appointment at her local store. It also invites her to chat with a live associate, who confirms availability and sets aside her top picks.
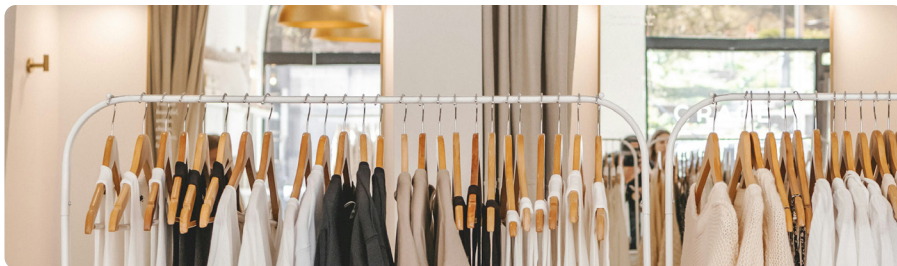
03. In store, Susan is greeted by name. The stylist, pre-briefed by the AI, suggests accessories to complete the look. She buys the dress and shoes, adds tailoring, and chooses next-day delivery.

04. Days later, the AI triggers a follow-up message through Susan's demonstrated channel of choice. It checks on the fit, recommends new pieces based on her historical preferences, and invites her to a loyalty event next month.

The AI handles discovery, recommendations, logistics, and follow-up, making decisions rooted in data and easily managed by guardrails to drive efficiency. The human associate steps in to add trust and emotional intelligence in critical moments. Susan gets a seamless, helpful experience across channels—and the perfect outfit for her son's big day.

Create a Data Environment and Ecosystem for Agentic Success

Agents need empowerment to succeed as digital workers.

Imagine you're training a new hire to build and launch a media campaign. What resources would you give them? What information do they need? You might tell them things like who to target, where to find creative assets, and how to judge success.

What are frameworks?

Frameworks are the rules that help AI agents communicate clearly, work together smoothly, think through problems, choose actions, carry them out, and learn from the results.

Think of an AI agent as a new hire that you're trusting to act on your behalf. It must be able to understand its environment, make decisions, and act independently.

Clean, connected, comprehensive data is a must—but that's nothing new, and it's not enough. There are other tech and resource requirements for AI agents and agentic AI to work.

Frameworks provide the essential rules and guidelines for AI agents to effectively:

- **Communicate:** Exchange data and instructions clearly.

- **Coordinate:** Collaborate on tasks, manage dependencies, and avoid conflicts.

- **Reason:** Interpret context and information to make sense of situations.

- **Decide:** Select appropriate actions based on objectives and available data.

- **Act:** Perform tasks in a specified environment.

- **Reflect:** Observe the outcome of each action and decide on the next one.

The framework landscape is evolving too fast to mention names here. But the best frameworks share three key traits: **pre-built components** that speed up development; **interoperability for agents** on different platforms to work together; and **scalable architectures** to support growing workloads.

Agents also need **rules of engagement**.

Agents don't work in isolation. Protocols define how they communicate with each other and with external systems like data sources or end users.

There are two notable emerging standards:

- **Model Context Protocol (MCP):** MCP is an open standard designed to provide a universal way for AI assistants (such as chatbots or agents) to securely access relevant information from content repositories, business software, and development tools. MCP aims to simplify integration, so AI can tap into necessary data without complex, custom connections.

  Key elements include specifications/SDKs for developers, local server support, and open-source connectors for common platforms (e.g., Google Drive, Slack). The result: more accurate responses, better context, and more personalized marketing.

- **Agent-to-Agent (A2A) Protocols:** These protocols govern communication between specialized AI agents within a system. This collaboration powers complex workflows and multi-step actions that go beyond rule-based automation.
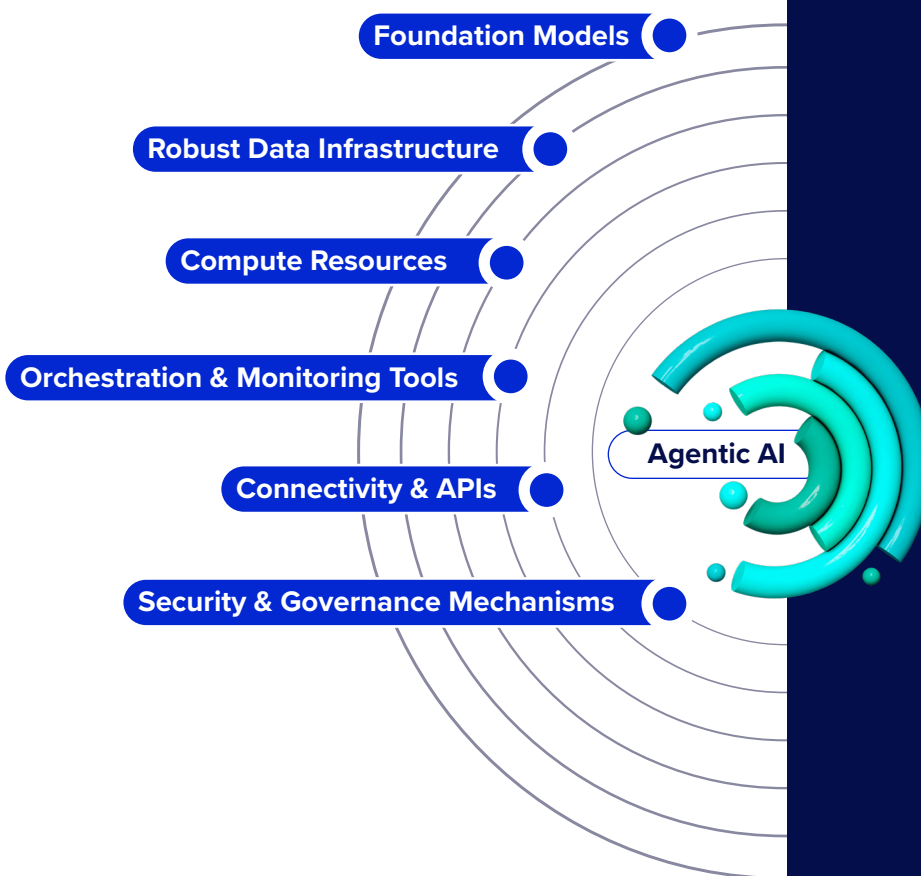
Frameworks and protocols are essential building blocks. But agentic AI requires more than just structure and communication.

Agentic AI needs a robust **supporting cast**.

There are a host of other components that fuel agentic AI success. A few of those include:

Foundation Models

Robust Data Infrastructure

Compute Resources

Orchestration & Monitoring Tools

Connectivity & APIs

Agentic AI

Security & Governance Mechanisms

When real-time personalization is the ultimate goal, basic data and data infrastructures don't cut it. You need sufficient power, connectivity, and safeguards to avoid poor outcomes. That's a tall order when many companies are still trying to break down data silos and connect their technology.

- **Foundation Models:** Access to capable underlying AI models (such as large language models) for reasoning and decision-making.

- **Robust Data Infrastructure:** High-quality, accessible, and often real-time data pipelines and storage.

- **Compute Resources:** Sufficient processing power (CPU/GPU) to run the agents and models.

- **Orchestration & Monitoring Tools:** Systems to manage, coordinate, and observe the behavior of multiple agents.

- **Connectivity & APIs:** Reliable ways for agents to interact with various tools, data sources, and platforms.

- **Security & Governance Mechanisms:** Oversight to ensure agents operate safely, securely, and within defined boundaries.

Partner infrastructures and resources simplify AI agent implementation.

When it comes to implementing an AI agent, you have two options. You can build it yourself, which gives you full control. Or you can work within your tech partner's infrastructure. Merkle can support either path. But in most cases, we recommend building within a partner ecosystem. Here's why:

- **They'll handle adaptation.** This is a rapidly changing arena, and the architecture that's necessary to keep up will continue to evolve over the coming years. Your tech partner has the resources—and motivation, thanks to thousands of customers like you—to adapt quickly and carefully. Let them shoulder that burden for your team.

- **It's easier and quicker to market.** The major technology partners have pre-built agents with defined use cases. If you're already invested in their tech stack, getting started with AI agents could be as simple as clicking a few buttons. If you build agents independently, you may already be behind by the time you're ready to go live.

- **The backend guardrails are ready.** Oversight and governance are critical for agents and agentic AI to work. Your partner has likely built those out already and has the resources to test for compliance.

- **Reporting and tracking are at your fingertips.** These elements are similarly available out of the box and fully vetted for accuracy.

- **You can customize.** Get the best of both worlds with bespoke agentic solutions and the security, structure, and scale of a partner. We can create custom agents within a partner ecosystem to meet your enterprise needs. Take advantage of your tech stack investments while moving beyond pre-built agent options.

When might it make sense to build agents on your own? If you're dealing with data that's very sensitive or has high-stakes legal ramifications, full control may be non-negotiable. Otherwise, we see partners as the way to go.

Use **Salesforce Agentforce and Merkle** to shorten your on-ramp.

If your business already runs on Salesforce, Agentforce is the fastest way to bring AI agents to life.

Our 1,000+ certified Salesforce AI professionals help you identify high-impact use cases and launch agents that work. You can start with a proven model or build something custom. Either way, you're not starting over. You're moving forward—smarter and faster.

Plus, Agentforce connects directly to Merkle's identity solution, giving agents access to robust customer profiles. That makes interactions more timely, personal, and precise.

For marketing leaders ready to pilot agents for impact, Agentforce offers a clear path to maximize agentic use cases while keeping data secure. See real results, built on what you already have.

Curious where to start? We'd love to talk.

The Perks of Agentforce

- **Starts where you are.** Integrates with your existing Salesforce environment.

- **Flexible build options.** Use a ready-made agent or design your own for your specific goals.

- **Data-aware by design.** Connects directly to Merkle's identity solution to personalize every interaction.

- **Expert-led delivery.** Supported by 1,000+ certified Merkle Salesforce AI specialists.

- **Security you can trust.** Features such as data masking and zero copy data federation keep your assets safe.

- **Saves time and resources**. No need to build out the full infrastructure agentic AI requires — Salesforce has done it for you.

It's time to realize the promise of agentic AI.

Agentic AI makes adaptive experiences that are responsive, personal, and data-driven real—and repeatable—at scale.

The potential is here. But reaching that level consistently takes more than advanced tools; It takes structure. Clean, connected data. The right technology. Clear use cases that deliver early value and create space to grow.

The path forward starts now. Begin with one focused AI agent use case. Test, learn, and build momentum. With the right foundation, each step makes the next one easier—and more impactful.

Merkle can help you assess your readiness and build a roadmap tailored to your goals. And if your business runs on Salesforce, Agentforce offers a direct, practical path to deployment with prebuilt agents, integrated data, and the governance needed to scale responsibly.

Agentic AI isn't just part of the future of adaptive experiences, it's the engine that powers them. Every smart move you make today brings that future within reach.

ABOUT MERKLE

Merkle, a dentsu company, powers the experience economy. For more than 35 years, the company has put people at the heart of its approach to digital business transformation. As the only integrated experience consultancy in the world with a heritage in data science and business performance, Merkle delivers holistic, end-to-end experiences that drive growth, engagement, and loyalty. Merkle's expertise has earned recognition as a "Leader" by top industry analyst firms, in categories such as digital transformation and commerce, experience design, engineering and technology integration, digital marketing, data science, CRM and loyalty, and customer data management. With more than 16,000 employees, Merkle operates in 30+ countries throughout the Americas, EMEA, and APAC. For more information, visit www.merkle.com.