



Precision CRM: Making good on the failed promise

A vision for our industry from David Roberts, Chief Executive Officer



Executive summary

I spent the first twenty years of my career on the other side of the table, inside Accenture, sitting across from CIOs, heads of sales, and chief customer officers, helping them stand up CRM systems meant to solve one problem: fragmented customer data. For nearly three decades, the industry organized itself around a single aspiration, the 360° Customer View. Get every system talking to every other system. Put all the data in one place. Give every seller, every service rep, every marketer the complete picture.

We succeeded. That is the part of this story I do not think we tell enough. The 360° view was not a failed promise. It was delivered, and it solved a real and expensive problem. But somewhere in that success, we created a new one. Complete information is not the same as usable information, and I have watched, first as a consultant and now as a CEO, the moment when more data stopped making our decisions better and started making them slower.

By solving the problem of the fragmentation of systems, we created a new problem: a fragmentation of attention. We have given sellers (who are already overwhelmed with large account lists and product portfolios) complete unfiltered access to data and insights that they do not have the time or ability to wade through and act on.

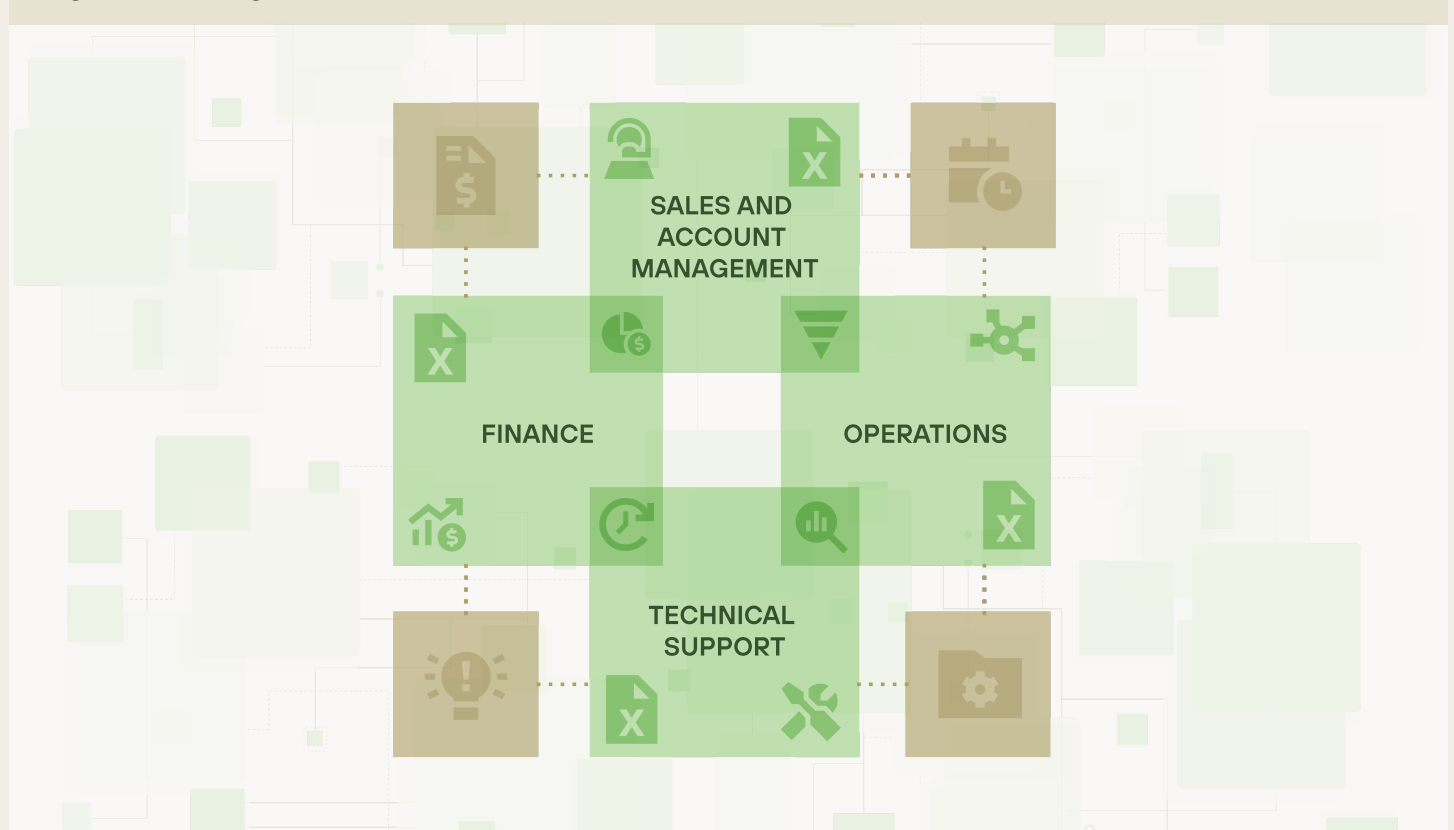
Today, artificial intelligence gives us a way out of that trap, but only if we're honest about what CRM should be for. This paper is my attempt at that honesty. I call it Precision CRM: a management philosophy built not around exposing everything we know about a customer, but around surfacing the few things that deserve a human being's attention right now. If the defining question of the last generation of CRM was "do we have the data?", the defining question of this one is "have we protected our people's attention enough to use it?"

The 360° vision delivered all it could

I remember the whiteboards. Nearly every CRM engagement I worked on started the same way: a wall covered in disconnected systems (Figure 1). A sales tool here, a support ticketing system there, marketing automation somewhere else, and an ocean of spreadsheets holding everything nobody trusted enough to put in a system at all. The customer existed in fragments, and every fragment belonged to a different department with its own definition of the truth.

The 360° Customer View was the right answer to that problem. In a world where sales didn't know what support knew, and marketing didn't know what finance knew, more context genuinely produced better decisions. Unifying that data was not a nice-to-have; it was the foundation of every serious customer strategy for a generation, and it is the reason CRM became one of the largest categories of enterprise software in the world. I built my career on the belief that this integration mattered, and I still believe it. The problem we have now is a different one, and it only exists because the first problem got solved.

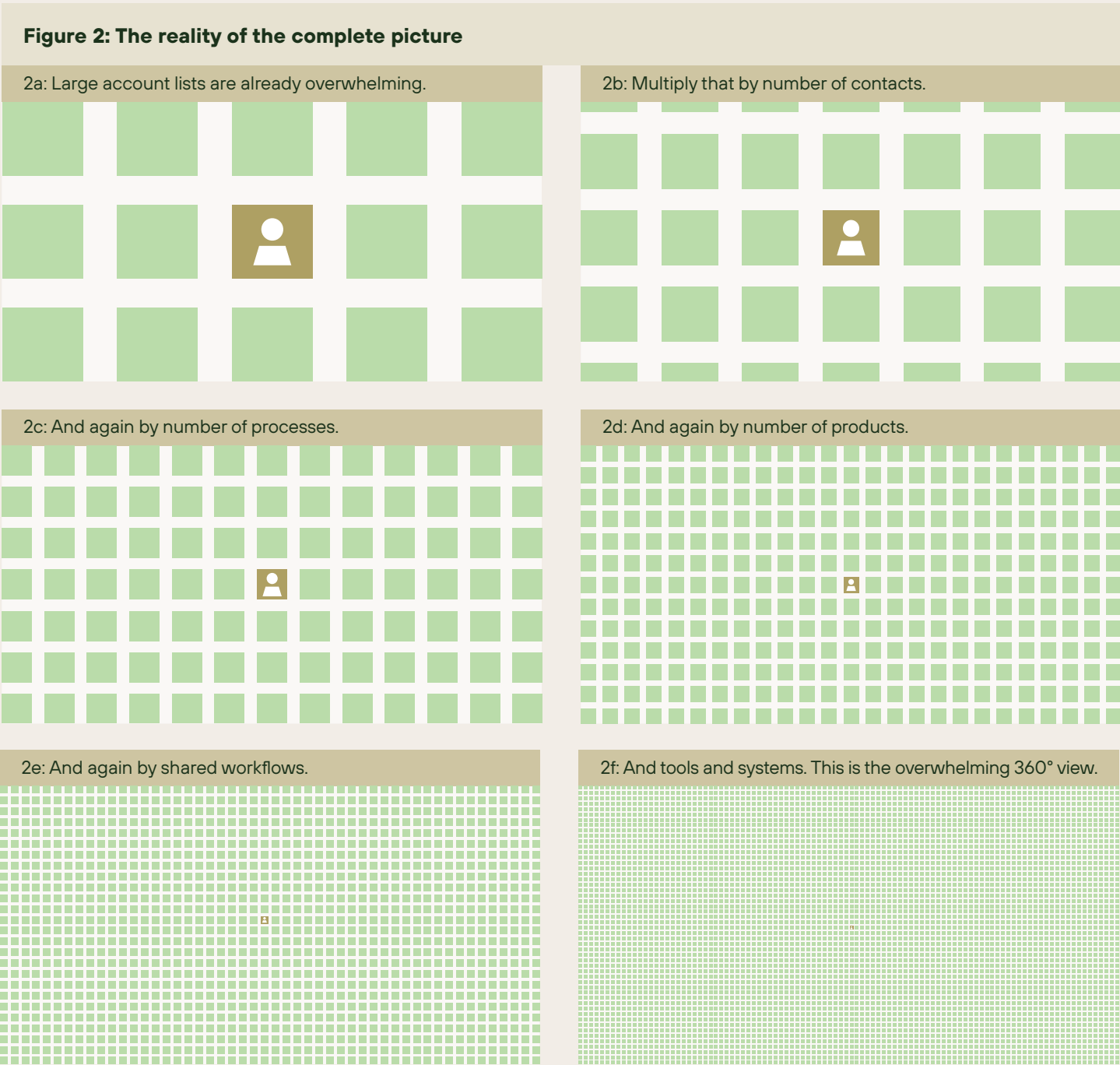
Figure 1: The fragmented customer



Success created the cognitive tax of CRM

Walk the floor of any sales or customer success organization today and you will see the cost of that success. The modern seller doesn't lack information. They are drowning in it. Dashboards stacked on dashboards. Alerts competing with alerts. Usage metrics, support tickets, call recordings, win-loss notes, competitive intelligence, news alerts, and now a growing pile of AI-generated summaries sitting on top of all of it.

When your average rep is managing 86 accounts¹ [Figure 2a], with multiple contacts at each account [Figure 2b], potentially running numerous processes (renewal, discounting, complaint escalation, expansion, etc) [Figure 2c], across a vast product catalog [Figure 2d], with a workload split between departments [Figure 2e], managed on many systems and tools [Figure 2f], giving them the full picture, and notifications of every change, is never going to lead to efficiency or efficacy.



The numbers back up what I hear anecdotally in nearly every customer conversation I have. Salesforce's State of Sales research has found that the average rep spends only 28 to 30 percent of the week on direct selling activity, with the remaining time absorbed by administrative work, internal meetings, manual data entry, and research². Forrester's Activity Study, which tracked more than 3,000 sales reps across industries, found that the average rep

loses nearly two full working days a week to administrative tasks alone³. And a September 2024 Gartner survey of more than 1,000 B2B sellers found that 72 percent feel overwhelmed by the number of technologies they are expected to use to do their job, and that overwhelmed sellers are 45 percent less likely to attain quota than their peers⁴.

By the numbers: The cognitive tax

28 – 30%:

share of the week the average rep spends on direct selling activity, per Salesforce's State of Sales research.

**~2 days/
week:**

time the average rep loses to administrative tasks, per Forrester's Activity Study of 3,000+ reps.

72%:

of B2B sellers feel overwhelmed by the number of technologies required for their job (Gartner, 2024).

45%:

lower likelihood that an overwhelmed seller attains quota, compared to peers (Gartner, 2024).

That last statistic is the one that stops me. Somewhere along the way, the system built to reduce fragmentation started producing a fragmentation of attention instead. The challenge our industry faces is no longer "can we find the information." It is "can we filter it fast enough to act."

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We did not build CRM to add administrative work for sellers. We should deliver software that makes the next best action obvious.

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¹ SugarAI, Selling in manufacturing and distribution 2026/2027 research report: sugarai.com/resources/selling-in-manufacturing-and-distribution-2026-2027-report

² Salesforce, "State of Sales" research, cited in Salesforce's Sales Statistics resource: salesforce.com/sales/state-of-sales/sales-statistics

³ Forrester, "Sales Productivity Activity Study," forrester.com/resources/sales-productivity/activity-study

⁴ Gartner, "Gartner Sales Survey Reveals Sellers Who Partner With AI Are 3.7 Times More Likely to Meet Quota," press release, September 16, 2024. gartner.com, September 2024

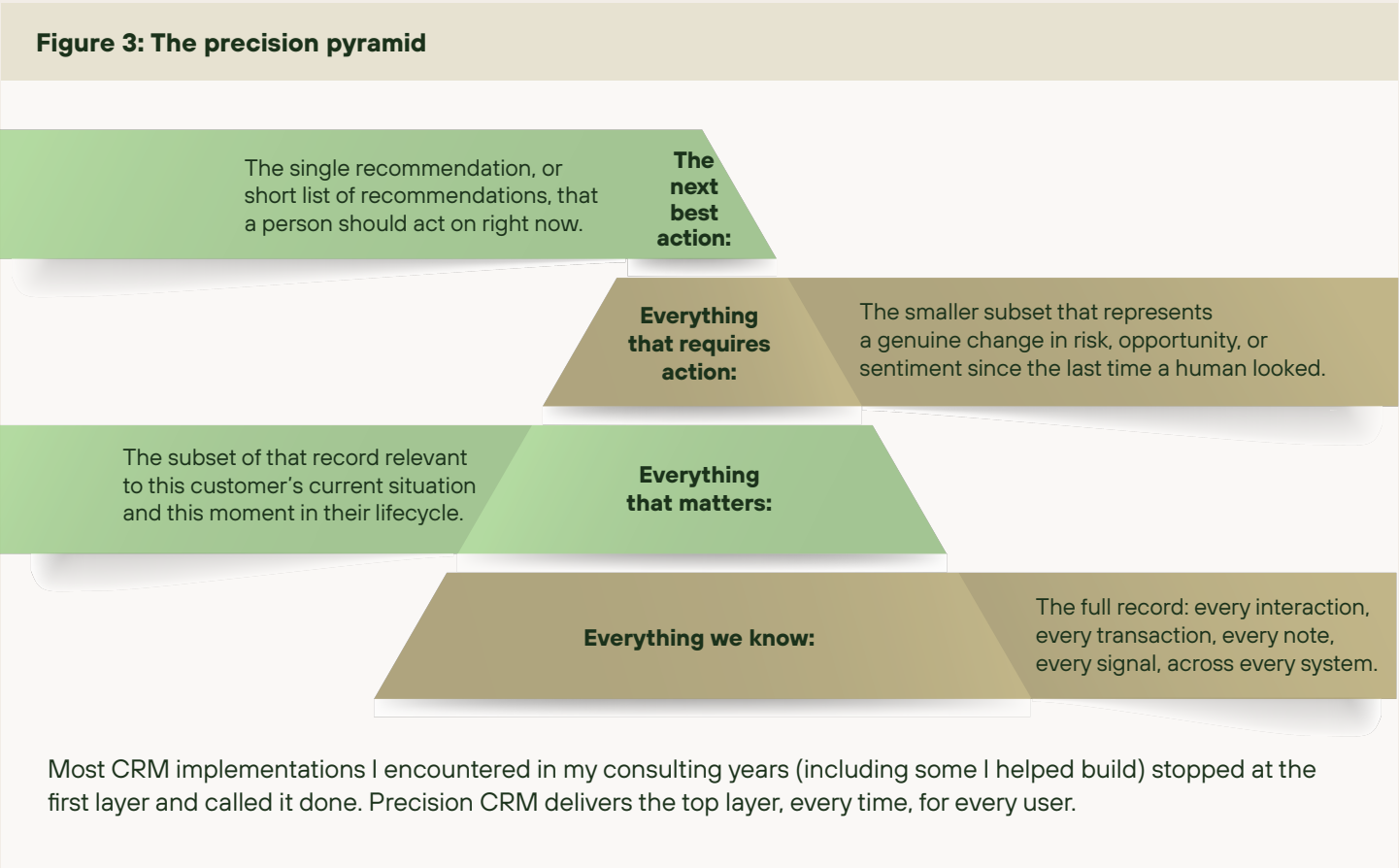
Introducing precision CRM

Precision CRM is my answer to that challenge, and it is a discipline before it is a product feature. It is the practice of delivering only the information required to make the next best customer decision: nothing more, and critically, nothing less.

I want to be precise about what this is not. Precision CRM is not about collecting less data. The underlying discipline of unifying customer information across systems remains as important as it ever was; you cannot make a good judgment

on a foundation of fragments. What changes is what we choose to expose, and to whom, and when. It is about the courage to build software that shows dramatically less than what it knows, because what a person can act on in the next five minutes is a small fraction of what an organization knows about a customer in total.

I think about this as a pyramid [Figure 3], because it forces a discipline of subtraction as you move up it:

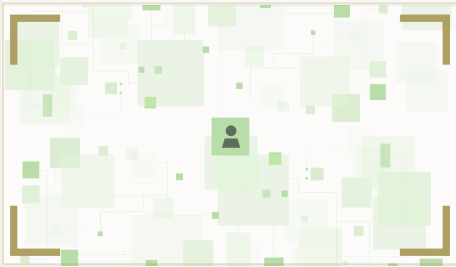


The 3.6° view

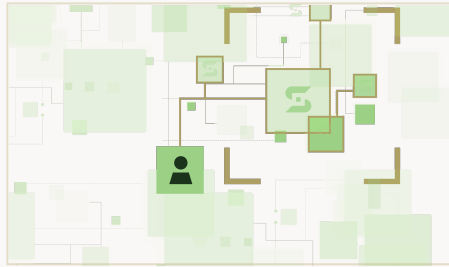
I use the phrase “the 3.6° View” deliberately, as a provocation against the very framework that defined my career. Rather than asking a system to show everything, at every angle, all at once, the 3.6° View asks a much

narrower and much harder question: out of everything the organization knows right now, what is the one-hundredth slice that actually matters [Figure 4]?

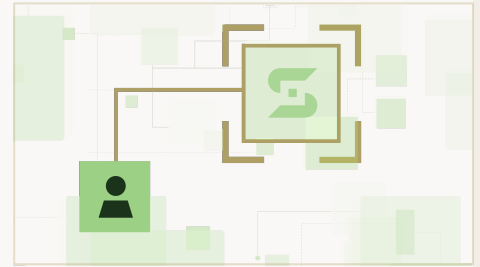
Figure 4:



A 360° view with every piece of information about every account.



A 36° view with an overview of which accounts need attention.



A 3.6° view with guidance on what to do today.

In practice, that slice tends to be built from a small, recognizable set of signals: a change in the customer’s executive sponsor, an early warning sign of renewal risk, a decline in product adoption, a new expansion opportunity opening up, or a clear recommended next action generated from the pattern across all of the above. None of this is exotic. What is different is the posture: instead of trusting a human to find these signals inside a sea of dashboards, the system takes responsibility for surfacing them, and stays quiet about everything else until it is asked.

I do not think of the 3.6° View as a rejection of the 360° View. I think of it as what the 360° View was always in service of.

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Completeness was never the goal. Completeness was supposed to be the raw material for good judgment. We just spent two decades stopping one step too early.

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AI changes the potential for CRM

Here is the honest reason Precision CRM is possible now in a way it was not five years ago: AI has changed what we can reasonably ask software to do. Legacy CRM asked human beings to be the analysis engine: to open the dashboard, scan the fields, cross-reference the history, and form a judgment. That was a reasonable design when the alternative was no data at all. It is not a reasonable design when the volume of available signal has grown the way it has.

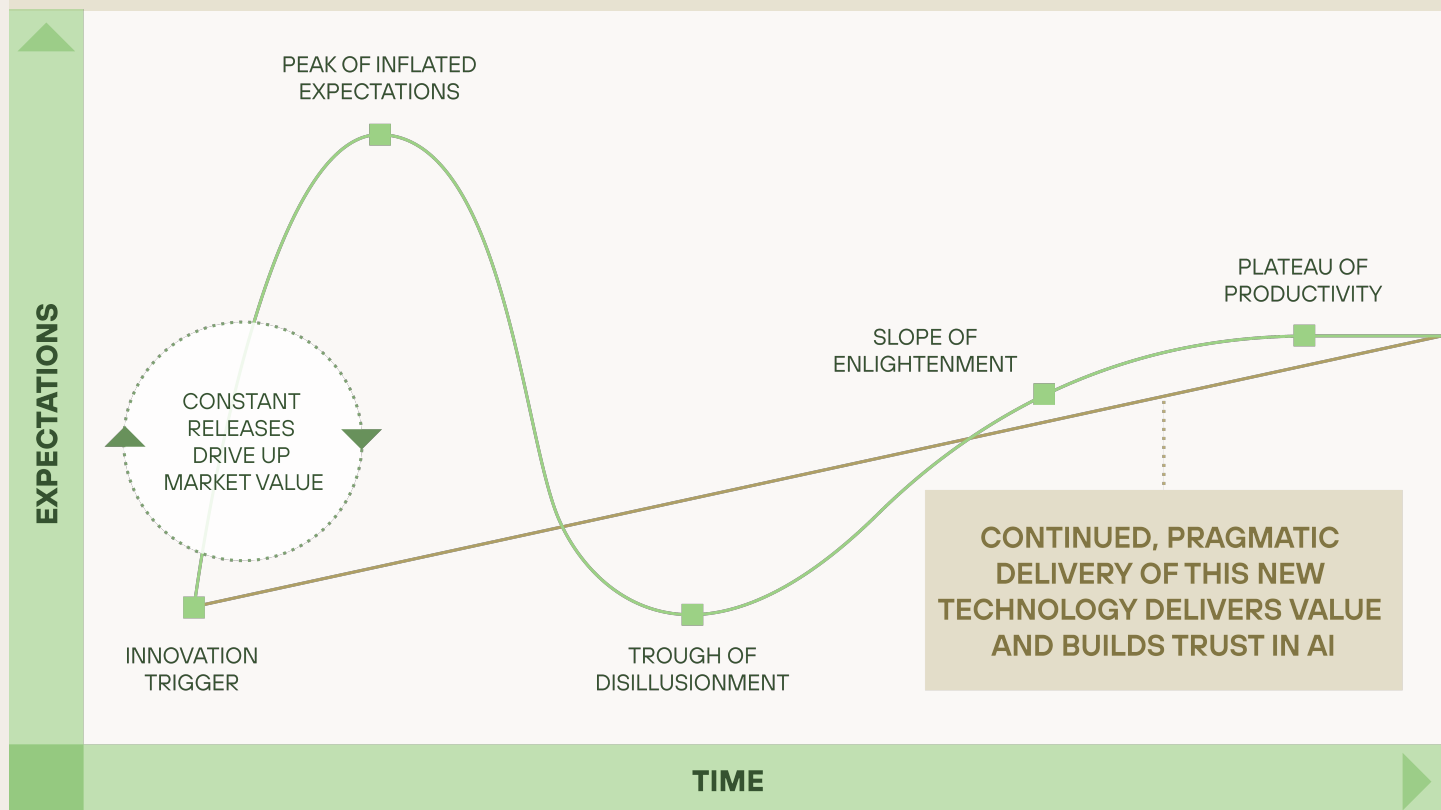
AI lets us flip that division of labor. Software can absorb the complexity (reading every ticket, every call transcript, every usage log, every email) and surface a synthesis. People are left to do the part only people can do: apply judgment, manage the relationship, and decide what to do next. Bain & Company's 2025 Technology Report found that AI has the potential to roughly double the share of a seller's week spent actually selling, from around 25 percent to as much as 50 percent, by absorbing the surrounding work that doesn't directly move a deal forward⁵. Among sellers who have adopted it well, 69 percent report that AI has shortened their sales cycle, and step-change improvements across the selling funnel are lifting win rates by more than 30 percent⁶.

I am careful here, because I have also seen this promise oversold. AI does not automatically produce precision. Left unmanaged, generative AI is just as capable of producing more summaries, more alerts, and more dashboards as the systems it was meant to replace. The organizations that will benefit are the ones that use AI deliberately to narrow what reaches a human being, not merely to generate more content about the customer. The technology is necessary for Precision CRM. It is not sufficient without the discipline this paper describes.

Practical, valuable usage of AI requires considerate application of specific technology. Because of the market dynamics of the AI space, it is easy to get caught in a never-ending loop at the start of the hype cycle [Figure 5]. Constantly trying to keep up with the latest models will invariably drive up the market value of the large AI companies, while keeping you in early-adopter mode, costing much time and resources and delivering variable results.

To drive real value, look for the technology that follows the pattern of previous innovations. After the hype dies down, productized applications surface that deliver repeatable, predictable results. This is where the AI space is now, if you can manage to look past the bluster.

Figure 5:



⁵ Bain & Company, "AI Is Transforming Productivity, but Sales Remains a New Frontier," Technology Report 2025. [bain.com, Technology Report 2025](https://www.bain.com/Technology-Report-2025)

⁶ Bain & Company, Technology Report 2025, op. cit. [bain.com, Technology Report 2025](https://www.bain.com/Technology-Report-2025)

What leaders should do

If you lead a sales, service, or customer success organization, I would encourage you to treat this as an operating discipline, not a software decision. In my conversations with customers, four actions consistently separate the organizations making real progress from those still adding dashboards [Figure 6].

Figure 6:



⁷ Gartner, "Gartner Survey Finds Sales Organizations That Provide AI-Enabled Next Best Actions Are 2.6x More Likely to Achieve Commercial Growth," press release, [gartner.com](https://www.gartner.com)

Conclusion

The first generation of CRM was built to capture customer information, and it did that job well enough to become indispensable. I spent twenty years helping organizations build that capability, and I remain proud of that work.

But I believe the next generation of CRM will be judged by a different standard entirely. It will be built to protect customer attention: the attention of the people inside our organizations who are trying, every day, to make one more good decision for one more customer, faster than they could before.

That is the promise of Precision CRM, and it is the standard I intend to hold my own company to.

So what do you do next? **This diagnostic tool** will help you identify if your company is affected by the attention fragmentation I've talked about here, and it ends with a practical workbook to make my recommended actions easy to follow.

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The organizations that win will not be the ones that know the most about their customers. They will help their people move quickly to engage the customer.

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David Roberts is Chief Executive Officer. Before moving into CEO roles, he spent more than twenty years at Accenture advising organizations on CRM strategy and implementation.



Unlock sales potential

About SugarAI

SugarAI is reimagining CRM for a new era of selling. We turn customer intelligence into action, helping sellers focus on the accounts that matter most, uncover risk and growth opportunities, and know what to do next. The result is greater precision across every customer relationship helping businesses win, retain, and grow more revenue.

Learn more at www.sugarai.com