SugarAI

How to get value out of your unstructured data

Find overlooked customer signals, identify revenue opportunities and turn information into action.



INTRODUCTION

Your customer information is telling you more than you think

A customer raises concerns about delivery reliability during an account review. A service representative hears a similar complaint the following week. Meanwhile, the customer's order frequency has started to decline.

Each piece of information exists somewhere in the business. But does anyone see the complete picture early enough to act?

The opportunity here goes beyond visibility. By connecting what customers are saying with what the business already knows, it's easier to identify which signals matter and turn them into commercial action.

For commercial leaders managing hundreds of customer relationships, today's challenge is knowing which accounts need attention before a missed signal becomes lost revenue.

For manufacturers and distributors, valuable commercial intelligence isn't limited to CRM records, ERP transactions and dashboards. It also exists in customer conversations, emails, meeting notes, service interactions and informal feedback.

This information is often referred to as unstructured data: information that doesn't fit neatly into predefined fields or tables.

Unlike order history or inventory records, it can be difficult to organize, compare and analyze consistently. Yet it often contains important context about what customers need, what they're planning and where relationships may be changing.

This guide introduces a practical methodology for doing that, whether you're starting with existing tools or exploring how AI could help you scale the process.



1. Start with a commercial question, not the data

One of the easiest mistakes organizations make is beginning with the information they have rather than the business decision they're trying to improve. Customer conversations, emails and meeting notes can contain thousands of observations. Reviewing everything without a clear objective quickly becomes an exercise in collecting information rather than generating value.

A better starting point is to identify a specific commercial question. For manufacturing and distribution leaders, three areas are particularly useful:

Customer retention

Which accounts are showing early warning signs of dissatisfaction or competitive pressure?

A customer might mention concerns about delivery reliability, product availability or pricing long before those issues become visible in purchasing reports.

These observations can help account teams recognize emerging risks, particularly when combined with changes in ordering behavior.

Revenue growth

Which customers are indicating new requirements, expansion plans or unmet needs?

A customer might mention opening another facility, expanding production capacity or introducing a new product line.

That information may never appear as a formal opportunity in CRM, but it could signal a future purchasing requirement.

Operational improvement

Which recurring customer complaints reveal wider issues affecting commercial performance?

If several customers raise similar concerns about delivery times, product availability or order accuracy, the issue may extend beyond individual accounts.

Recognizing those patterns can help commercial and operations leaders identify problems that affect retention, customer satisfaction and revenue.

The important principle is to start with one question that matters to the business.

Rather than asking, "What can we learn from all our customer information?" ask, "What information would help us make this particular decision better?"

2. Identify where valuable customer intelligence lives

Once you've defined the commercial question, the next step is identifying where the relevant information might exist. In manufacturing and distribution businesses, valuable customer intelligence is often spread across systems, teams and individual employees.

Common sources include:

Information source	What it might reveal
Customer emails and correspondence	Changing requirements, pricing concerns, competitive activity or expansion plans
Sales calls and meeting notes	Customer priorities, relationship changes, objections and emerging opportunities
Customer service interactions	Recurring complaints, dissatisfaction, service problems and potential retention risks
Account reviews and visit reports	Strategic plans, upcoming projects, purchasing expectations and relationship health
Internal Sales, Service and Operations communications	Issues affecting customer commitments, delivery performance or account priorities
Whiteboards, handwritten notes and informal feedback	Customer context and observations that may never enter a formal business system

Not every source will be equally useful for every commercial question.

If you're investigating customer retention, service interactions and account meeting notes may be particularly relevant. If you're looking for growth opportunities, account reviews may provide more useful information.

Where information gets overlooked

A common challenge is that important customer knowledge remains with the person who originally received it.

An account manager may know that a customer is considering another supplier. A service representative may have heard repeated complaints about delivery reliability. An operations colleague may know that the customer has changed its ordering requirements.

Each person holds part of the picture, but no one necessarily has the complete context. That creates a risk for the business, particularly when account ownership changes, employees leave or customer portfolios grow.

Making this information more accessible is the first step toward turning it into intelligence the wider organization can use.

3. Separate meaningful signals from noise

Not every customer comment deserves the same attention.

A single complaint about a late delivery doesn't necessarily indicate that an account is at risk. A casual mention of expansion doesn't automatically represent a qualified sales opportunity. The challenge is determining which observations are commercially significant and deserve further investigation.

A useful way to evaluate potential signals is through four criteria.

Assessment criterion	Question to ask
Commercial impact	Could this materially affect revenue, customer retention or operations?
Strength of evidence	Is this an isolated comment, or is it supported by multiple observations?
Recency	Is the information current and relevant to the customer's situation?
Actionability	Is there something the business can realistically do about it?

Example: When does a delivery complaint become a risk of losing a customer?

Consider a distributor whose customer mentions delivery concerns during three consecutive account meetings.

The first complaint may reflect an isolated problem. But repeated concerns deserve closer attention.

The account manager could investigate:

- Have deliveries consistently missed agreed service levels?
- Has the customer's order frequency changed?
- Are purchasing volumes declining?
- Has the customer mentioned alternative suppliers?
- Is the issue affecting other accounts?

We're not assuming the customer is about to leave, just whether the evidence justifies a conversation, an operational investigation or a change in account priority.



A meaningful commercial signal is information that could change a business decision, not anything unusual or noteworthy.

4. Connect unstructured signals with existing business data

Unstructured information becomes more valuable when it can be compared with the structured data the business already maintains. For manufacturers and distributors, that often means connecting customer conversations and feedback with ERP, CRM, service and operational information.

Consider these examples:

Unstructured signal	Structured data to investigate	Potential commercial insight
Repeated complaints about delivery reliability	On-time delivery rates, backorders, order frequency	An emerging retention risk
Customer mentions a planned facility expansion	Purchasing history, product mix, account potential	A possible growth opportunity
Buyer references competitor pricing	Margin trends, quote conversion, purchasing volumes	Competitive pressure affecting the account
Multiple customers request a new product specification	Product demand, lost opportunities, sales by category	An unmet market requirement

Neither source tells the complete story on its own.

A decline in purchasing volume may have several explanations. The customer could be experiencing lower demand, adjusting inventory levels, changing suppliers or moving purchases elsewhere. A conversation about competitor pricing provides additional context, but still doesn't prove why purchasing behavior has changed. Combining the information helps the business investigate more effectively.

A manufacturing and distribution example

Imagine an account manager visits a long-standing customer and hears that delivery reliability has become a concern.

Meanwhile, the ERP system shows that the customer's order frequency has declined over the previous three months.

Individually, these observations might not trigger action. Together, they suggest that the account deserves attention.

The account manager can now approach the customer with a more informed understanding of the situation, investigate the underlying issues and work with Operations to determine what needs to change.

This is the value of connecting unstructured and structured information. Patterns become obvious before they have commercial impact.

5. Turn intelligence into a commercial decision

Identifying a meaningful signal is only useful if the business can decide what to do with it. That requires a repeatable process for evaluating findings, assigning responsibility and measuring outcomes.

A practical framework is: **Identify → Validate → Prioritize → Assign → Measure**

Step	Key question	What happens
Identify	What signal or pattern has emerged?	Capture the observation and relevant context
Validate	What evidence supports or contradicts it?	Compare information across sources and confirm the facts
Prioritize	How significant is the potential business impact?	Determine whether the finding requires immediate action, further investigation or monitoring
Assign	Who should investigate or act?	Establish clear ownership
Measure	What would demonstrate that the action was worthwhile?	Track the resulting activity and business outcome

Putting the framework into practice

For our distributor experiencing delivery complaints and declining customer orders:

- **Identify:** The account manager recognizes repeated delivery concerns and a reference to a competing supplier.
- **Validate:** ERP and service data confirm declining order frequency and recurring delivery issues.
- **Prioritize:** The account represents significant recurring revenue, making the potential risk worth investigating promptly.
- **Assign:** The account manager takes responsibility for the customer conversation, while Operations investigates delivery performance and possible corrective actions.
- **Measure:** The team monitors whether service performance improves, customer concerns are resolved and purchasing activity stabilizes over time.

Not every finding needs to escalate to commercial leadership. Account-level issues can often be addressed by the account owner and relevant operational teams. Patterns affecting multiple customers, significant revenue exposure or wider business processes may require management involvement.

The important thing is that useful information leads to a clear decision about ownership and action.



6. Five mistakes to avoid

Turning unstructured data into useful commercial intelligence requires more than collecting and analyzing information. There are several common pitfalls that can undermine the process.



1 Mistake 1: Analyzing everything

More information doesn't automatically lead to better decisions. Start with a defined commercial question and prioritize the sources most relevant to answering it.

2 Mistake 2: Mistaking sentiment for evidence

A negative customer comment doesn't automatically indicate they're about to leave. Consider the context, frequency and supporting evidence before drawing conclusions.

3 Mistake 3: Ignoring business context

Customer conversations become more meaningful when evaluated alongside purchasing, service and operational information. Without that context, organizations risk acting on incomplete or misleading signals.

4 Mistake 4: Failing to assign ownership

An insight without a clear next step has limited business value. Determine who is responsible for investigating, acting on and monitoring each significant finding.

5 Mistake 5: Automating a poorly defined process

AI can help organizations process information at a scale that would be difficult to manage manually. But automation doesn't remove the need to define which signals matter, how they should be evaluated and when people need to review the results.

Before introducing AI-driven analysis, establish the commercial questions, decision criteria and responsibilities the technology should support.

Don't overlook data governance

Organizations also need to consider which information employees and AI systems are permitted to access.

Customer correspondence, commercial agreements, meeting notes and service records may contain confidential or commercially sensitive information.

Appropriate permissions, data retention practices, access controls and validation of AI-generated interpretations are essential.

AI-generated findings should be treated as information to evaluate, not unquestionable facts.

7. Practical exercise: Run a 30-day commercial intelligence pilot

A small pilot can help demonstrate the value of connecting customer conversations and business data before attempting to apply the approach across an entire customer base.

The objective is to identify meaningful commercial signals, understand what actions they support and measure the effort involved. This doesn't need to be led by the commercial leader personally. An account manager or small cross-functional team can run the pilot, with leadership defining the business question and reviewing the findings.

Start with 10-20 customer accounts and one clearly defined commercial question.



Week 1

Define the question

Choose the business decision you want to improve. For example: *Which existing customers may be showing early signs of declining engagement or retention risk?*

Identify the relevant customer accounts, information sources and baseline measures.

Week 2

Find and document signals

Review available customer interactions, emails, meeting notes and service records. Record relevant observations, including their source and date. Use the four signal-evaluation criteria to determine which findings deserve further investigation.

Week 3

Validate findings

Compare the observations with purchasing, service and operational data. Discuss significant findings with account owners. Identify which observations are supported by enough evidence to justify further action.

Week 4

Act and evaluate

Assign responsibilities for relevant findings. Record which observations changed an account priority, prompted a customer conversation or led to an operational investigation. Assess both the value of the findings and the effort required to uncover them.

How to evaluate the pilot

Measure	What it tells you
Meaningful signals identified	How much potentially useful information was uncovered
Percentage validated	How many observations were supported by additional evidence
Commercial decisions influenced	Whether findings changed priorities or actions
Time required	How much manual effort was needed
Follow-up actions initiated	Whether findings translated into activity
Outcomes tracked over time	Whether those actions contributed to measurable improvements

A 30-day pilot may not be long enough to demonstrate changes in customer retention or revenue. It can, however, show whether the approach uncovers useful information, improves decision-making and justifies further investment.

The scaling question

The pilot also reveals something important about the process itself. Reviewing customer conversations, meeting notes and transactional information across 10-20 accounts may be manageable.

Doing the same consistently across hundreds of accounts, thousands of interactions and multiple business systems is a different challenge.

The methodology remains valuable, but the amount of manual effort required can quickly become difficult to sustain. That's where technology has an important role to play.



8. Scaling the approach: From manual analysis to applied intelligence

The goal isn't to turn account managers into analysts. If you have completed the pilot and found value, you've identified a shortcoming in your current tech set up. It is missing valuable features, and filling that gap with extra legwork isn't the answer.

If you want to get value from your unstructured data at scale, you need tools that make valuable customer intelligence available to the people who can act on it, without requiring them to manually assemble the information every time they need to make a decision.

As organizations scale the approach, they need to assess whether their CRM can:

Bring relevant information together. Connect customer interactions, account records, service information and transactional data across the systems where they reside.

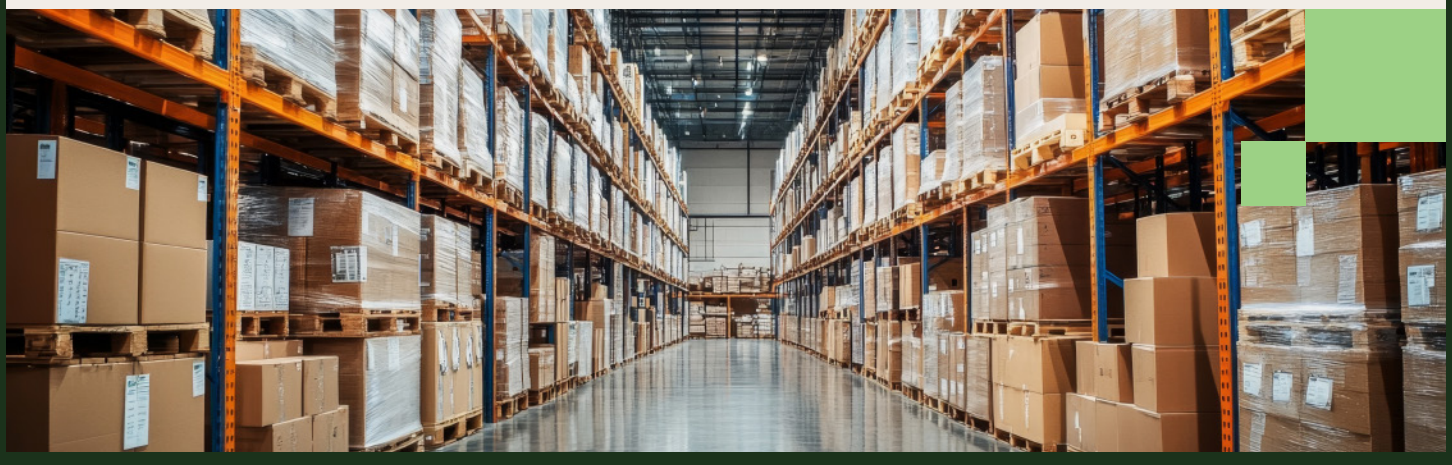
Establish business context. Interpret customer conversations alongside purchasing behavior, account history and operational information.

Identify meaningful patterns. Recognize changes that could indicate customer risk, growth opportunities or emerging business issues.

Prioritize by commercial significance. Distinguish information that requires attention from information that can be monitored or safely set aside.

Deliver guidance within existing workflows. Help the appropriate teams understand what has changed, why it matters and what they should consider doing next.

Measure the outcomes. Track whether the resulting actions improve customer relationships, operational performance and commercial results.



Where SugarAI fits

SugarAI's approach to Precision CRM is built around turning customer information into guidance that helps commercial teams know where to focus and what to do next.

By connecting relevant customer and business information and applying AI, organizations can move toward a more proactive approach to managing customer relationships, identifying opportunities and addressing risks.

The value isn't in showing employees everything the business knows about a customer. It's in helping them understand which parts of that information deserve attention.



CONCLUSION

The value is in what you do with the Information

Manufacturers and distributors already hold enormous amounts of customer information.

Some of it is structured and readily available in business systems. Much of it exists in conversations, correspondence, service interactions and the knowledge of individual employees.

The opportunity is to bring those sources together in a way that improves commercial decisions.

Start with a question that matters. Identify the relevant information. Evaluate the signals. Connect them with business context. Then determine what action is warranted.

The approach can begin on a small scale, but technology can help make it repeatable across a much larger customer base.

Ultimately, the goal is to turn the information you already have into better commercial decisions, stronger customer relationships and more opportunities for revenue growth, without adding more work for your sales teams.



Explore how SugarAI can help turn customer information into actionable commercial guidance.

Request a demo

SugarAI

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