

Agentic AI: From readiness to results

A four-step guide for marketers





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Agentic AI is here: Are you ready?

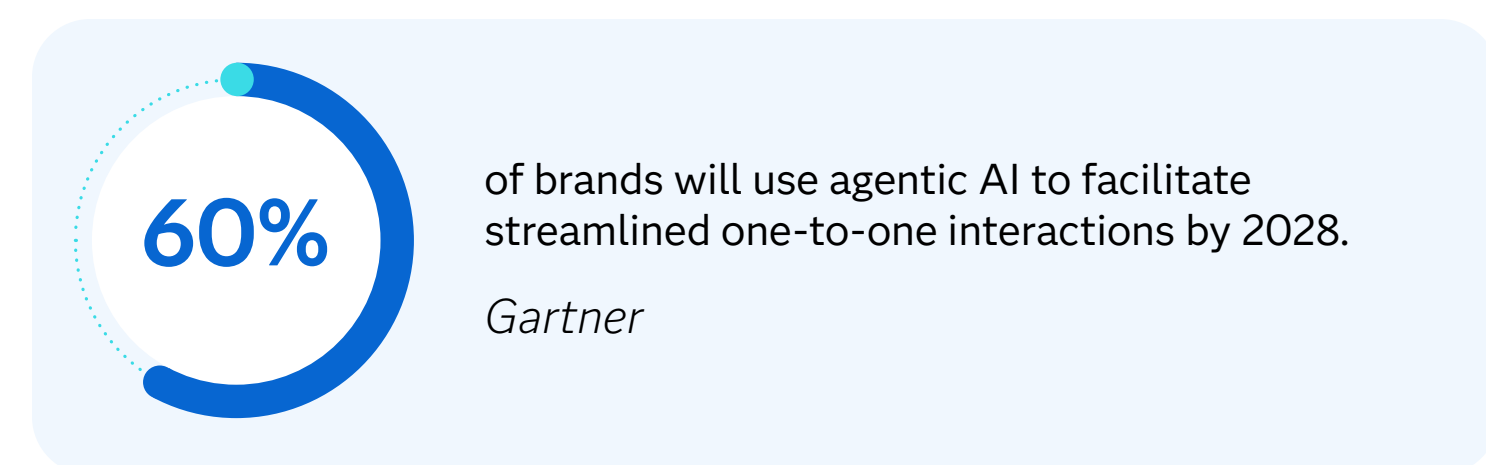
Although the statistics vary from analyst to analyst, one thing is undeniable: Marketers' interest in agentic AI is skyrocketing.

Agentic AI is on the minds of most marketers

Gartner predicts that **by 2028, 60% of brands will use agentic AI to facilitate streamlined one-to-one interactions**. As a result, marketing strategies will shift from channel-based efforts to AI agents that seamlessly span marketing, sales and support to create truly hyperpersonalized experiences.

In their *State of Martech report*, Scott Brinker and Frans Riemersma found that 68.7% of their survey participants had one or more LLM or agentic AI use cases implemented, largely focused on working more intelligently with incoming and outgoing customer communications.

And here's more data to back up the belief that agentic AI is on the minds of most marketers. Our research report with Coleman Parkes, *Marketers and AI: Navigating New Depths*, found that over half of marketers are planning to invest in agentic AI in the next year, while 21% are already testing agentic AI in live environments and 73% are planning to implement it within two years.



Don't overlook these two things

While these numbers look quite promising, it's also important to put these two things into perspective:

- Most marketers are still getting their feet wet with **agentic AI** use.
- There is a logical progression along the AI maturity curve from **GenAI** and AI assistants to agentic AI – with the potential to progress to **quantum computing** in the future.

Marketers are progressing at different paces

Our research found that agentic AI usage splits marketers into three groups: **Observers** who are two years out from agentic use (40%); **Planners** who intend to move into agentic within a year (33%); and **Adopters** who are using agentic today (21%).

Speaking of the logical progression from GenAI to agentic, we also found that 80% of Adopters have a good understanding of GenAI, compared with 60% of Planners and 54% of Observers.

Agentic AI is close to crossing the chasm

Brinker and Riemersma echo these findings, highlighting that while AI assistants and standalone AI tools are now regularly used by most marketers, only innovators and early adopters are using AI agents and AI agent workflows. However, they predict that due to accelerated adoption rates across the AI field, agentic AI may “cross the chasm” and be used by the majority of marketers fairly soon.

What does agentic AI look like?
Autonomous Can operate independently, making decisions and taking actions without requiring constant human, step-by-step guidance.
Context aware Understands the “bigger picture,” such as the environment, business context and customer signals, to make informed decisions and adjust on the fly for optimal impact.
Self-improving Learns continuously from real-time data, past outcomes and uses techniques like reinforcement learning, refining its decision-making capabilities over time.
Proactively adaptable Acts proactively, identifying when to act and adapting in real time to changes rather than waiting for inputs or approvals.

What to consider before implementing agentic AI

Agentic AI has garnered some much-deserved hype and interest recently. But marketers can't merely throw caution to the wind and forge ahead – unless they've got a solid strategy in place.

There's a fine line between risk and reward

Enthusiasm and early examples of ROI aside, marketing organizations must understand that implementing agentic AI can be challenging – and success is not a slam dunk.

In fact, Gartner predicts that over **40% of agentic AI projects will be canceled** by the end of 2027 due to escalating costs, unclear business value or inadequate risk controls.

Gartner has also placed agentic AI at the “Peak of Inflated Expectations” in its latest **Hype Cycle for Artificial Intelligence**, saying that “the complexity of AI agents makes them vulnerable to access security, data security and governance issues. Organizations also exhibit a lack of true trust in AI agents' ability to operate without human oversight and concern about the significant impact of potential errors.”

Roadblocks and challenges along the way

Our research backs up these observations. As the adoption gap widens, other groups of marketers are struggling to keep up with Adopters. Planners and Observers are encountering challenges as they implement **AI**.

Four primary areas stand out as impediments to agentic AI success, including:

- Lack of critical infrastructure and organizational understanding of agentic AI.
- No coordinated strategy for agentic deployment.
- Inadequate emphasis on AI governance.
- Too much process automation.

Beyond our research, there are real-world examples of implementation challenges. MIT Sloan professor Kate Kellogg participated in **a project that used an AI agent to detect adverse effects** based on clinical notes. The biggest challenges revolved around data engineering, stakeholder alignment, governance and workflow integration.

Improving the odds of agentic AI success

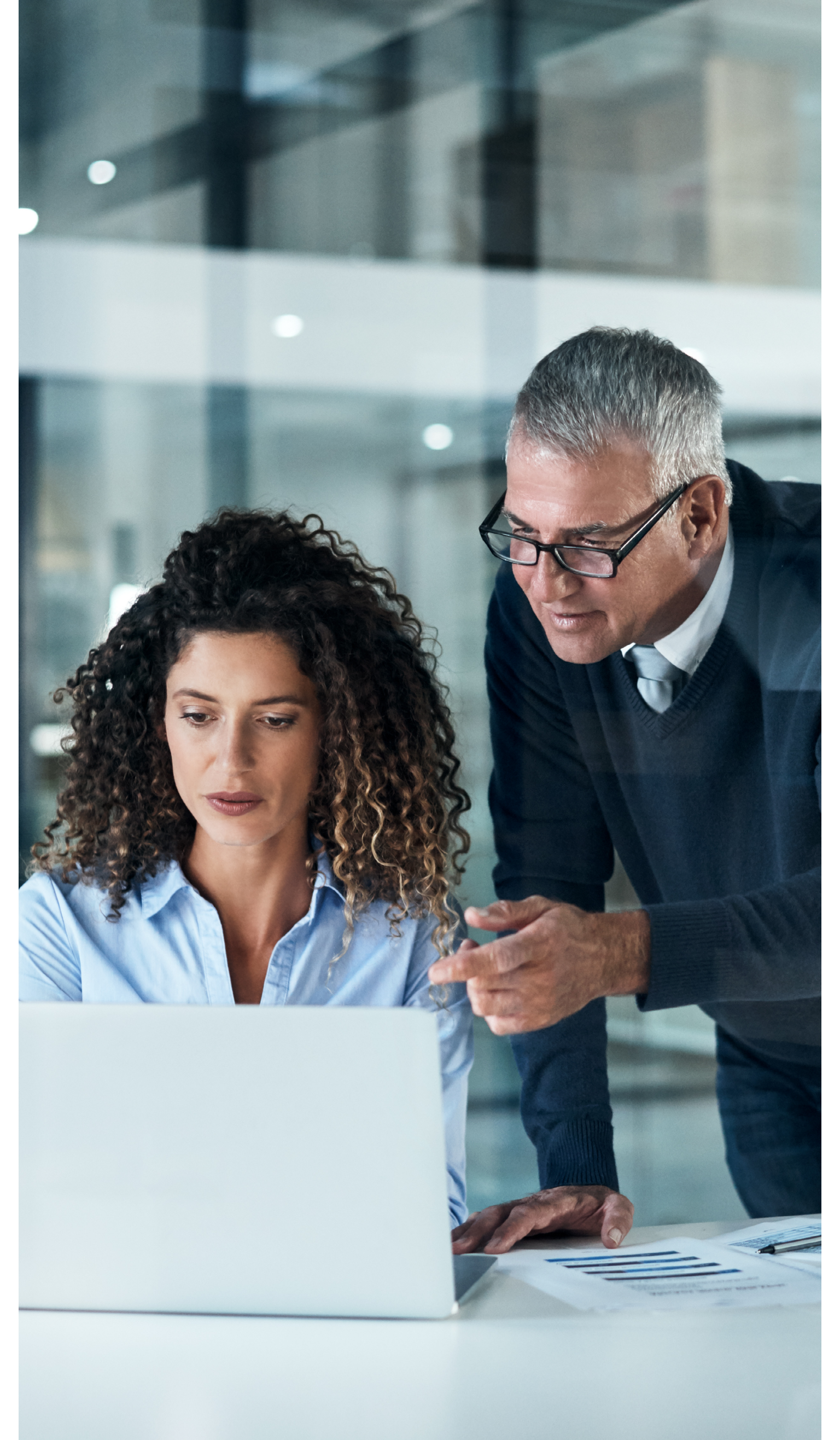
The good news? Addressing these critical impediments drastically improves chances for agentic AI success – regardless of where organizations sit on the AI maturity curve. Focus on these four steps for a successful agentic AI journey:

- **Get AI infrastructure and knowledge in place** – forging a path from GenAI to agentic.
- **Deploy agentic AI strategically** – understanding its powerful use cases.
- **Go beyond governance** – embedding confidence and ethical awareness.
- **Ensure trust by keeping humans in the loop** – employing one key safeguard for agentic AI.



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Gartner press release



STEP 1 Get AI infrastructure and knowledge in place

Many marketers don't have the AI infrastructure, knowledge and processes in place to adequately support their adoption of GenAI. As a result, they lack the practical skills to progress to agentic.

Workflow fundamentals are key

In an interview with SAS on how marketers can succeed with agentic AI, MarTech analyst, advisor and author Scott Brinker said many organizations lack a clear, concise definition of their existing workflows. Plus, these workflows tend to be institutionally learned rather than detailed in documentation. This is a problem because the typical first step for organizations implementing agentic AI is to plug the agent into these existing workflows.

To overcome this, Brinker suggests focusing first on the basic "blocking and tackling" work (i.e., the fundamentals) around discovery and possibly redesigning workflows where agentic AI is being considered.

It's an iterative process

Next, Brinker recommends focusing on iterative learning and experimentation, suggesting that adopting agentic AI is an iterative process. Expect some experiments to fail, but treat each attempt as a learning opportunity. The most successful adopters are those who embrace trial and error and continuously refine their approach.



Tip: Ensure workflows are understood and foster a culture of experimentation. The only way out is through: Get your team comfortable with hands-on exploration.

Experimentation, AI knowledge get things rolling

Our research corroborates Brinker's recommendation, finding that Adopters have gained greater capability and confidence through AI experimentation. Observers and Planners should expand their organizational knowledge of GenAI to smooth the transition from GenAI to autonomous AI models.

AI knowledge and requisite skills must also be addressed. In a [recent report on how to rewire MarTech for AI](#), McKinsey suggests that technology has outpaced talent as the pace of change in marketing technology has advanced faster than marketers' capabilities. They found that 34% of MarTech buyers and decision-makers cited underskilled talent as a key hurdle to their organization getting value from technology.



Tip: Closing capability gaps through robust onboarding and ongoing training is critical for success. Also pay attention to the C-suite: Senior leaders need fluency in MarTech and a clear understanding of how AI will impact the future.

AI-ready data management is the foundation

Beyond shoring up AI knowledge and skills, AI-ready data infrastructure is also critical. According to a survey by [Gartner](#), "63% of organizations either do not have or are unsure if they have the right **data management** practices for AI." The survey also revealed that organizations failing to "realize the vast differences between AI-ready data requirements and traditional data management will endanger the success of their AI efforts."



Tip: Take a detailed look at your data infrastructure and data governance practices. The infrastructure should be able to handle various types of data, including structured (databases), semistructured (JSON) and unstructured (images, video, text) data, with automated pipelines (data ingestion, cleaning, normalization) that continuously feed fresh, labeled data to models. Governance practices should cover all aspects of lineage, security and observability.



of organizations aren't confident they have the right data management practices for AI.

Gartner study



STEP 2 Deploy agentic AI strategically

As marketers start to put the infrastructure for agentic AI in place and become more comfortable with it, the sky's the limit for its use cases in marketing.

Comprehensive AI strategy is a missing piece

The good news is that with an agentic AI infrastructure, marketers can build use cases for everything from planning, designing and optimizing customer journeys to various aspects of campaign management (end-to-end campaign management, autonomous campaign execution), real-time **personalization**, dynamic offer optimization, scaled hyperpersonalization, and all facets of performance monitoring and reporting.

Unfortunately, many marketers are not taking a strategic approach to AI. They are unaware of possible use cases or the potential impact agentic AI could have on their bottom line. Just 25% of Observers are implementing an enterprisewide AI strategy, compared to 63% of Adopters. Only 3% of Observers report a strong understanding of agentic AI, while it's 61% for Adopters.

Integration isn't a seamless process

Scott Brinker sees many organizations looking to plug in agentic components into existing workflows, which is a reasonable approach. However, he also cautions that integration is still a challenge. Brinker says, "The number one challenge MarTech has had for the 18 years that I've been writing about it is how well the MarTech tools actually integrate with each other. While standalone AI tools like ChatGPT are widely adopted, embedding agentic AI into MarTech platforms is still finding its footing."

Brinker's advice is to integrate "piece by piece," advocating that marketers don't need to overhaul their entire organization overnight. Instead, start by bringing AI into specific workflow components, especially those involving unstructured data such as call recordings or email threads. This approach allows for gradual evolution and minimizes risk.

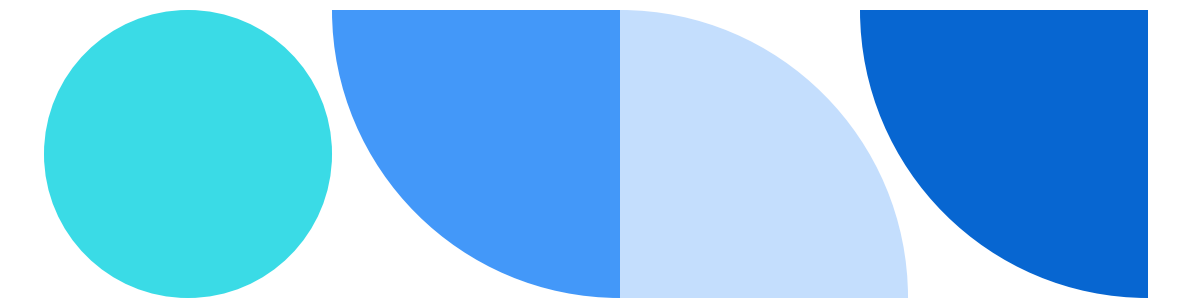
Gradual evolution is a good thing

He also suggests being choosy about change. "One of the worst things you can do is try to embrace every possible use case at once. Strategy is so much the art of deciding what not to do," notes Brinker.

Our research on the adoption of specific agentic AI use cases dovetails Brinker's advice on gradual evolution, finding that Adopters are deploying advanced use cases (such as continuous learning agents and performance reporting), while Planners focus on simpler functions (such as automated journey design) and Observers look to agentic AI conversational agents as their first step.



Tip: Look for "low-hanging fruit" areas where AI can quickly improve efficiency or effectiveness. Also, focus on building organizational agility at all levels. Sometimes, being a little bit more agile than the competition is all it takes to stay ahead.



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Scott Brinker, MarTech analyst, advisor and author

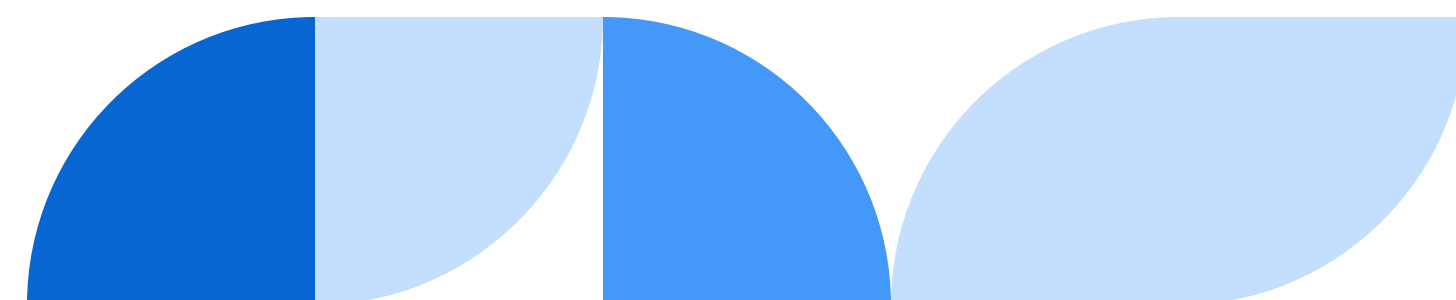
Progress lies in the right KPIs

When developing an agentic AI strategy and use cases, keep in mind the importance of laying the foundation for measuring use-case ROI.

MIT Sloan professor Kate Kellogg highlights that **defining clear outcomes and key performance indicators at each phase of deployment is critical** to sustaining agentic AI progress. Metrics should align to key business goals because benefits from agentic AI can be misconstrued. "Just because an agentic AI model reclaims 20% of someone's time, that doesn't mean it's a 20% labor-cost savings," Kellogg said.



Tip: Accurately assessing the value of agentic AI is about understanding the strategic leverage these technologies provide. Look to measures that show that the agents are enhancing customer lifetime value, accelerating product development cycles or providing a substantial competitive edge in rapidly evolving markets. Speed to outcome, cost to serve and net-new capabilities are also worth considering.



STEP 3 Go beyond governance

As agentic AI matures, governance must evolve with it. Moving beyond rules and policies means building trust, transparency and ethical guardrails directly into AI-driven marketing operations.

Governance is a blind spot for marketers

AI governance has been a recurrent issue for marketers. In 2024, our research revealed that fewer than 1 in 10 organizations had a well-established and comprehensive AI governance framework (7%), while half of marketers (48%) stated that their main concern about GenAI usage in their organization was governance.

Currently, while 79% of marketers feel somewhat confident in their organization's marketing AI governance, less than 10% are strongly confident. A significant gap exists between Observers and Adopters, with 73% having no agentic AI governance in place while 52% of Adopters are developing that framework.

Trust is a major issue

Emily Weiss, Senior Principal Researcher at Gartner, also emphasizes **the importance of governance and trust accompanying agentic AI efforts**, "This marks the end of channel-based marketing as we know it. Marketers must prepare by putting strong data governance in place, tracking customer journey changes weekly and integrating agentic systems into MarTech stacks to enable secure, ethical personalization at scale."

Scott Brinker also acknowledges AI governance challenges are holding back organizations from going all in on agentic AI. Brinker notes, "Many organizations still don't fully trust where they can deploy AI within production processes or customer experiences, partly because they're still developing the governance frameworks and evaluation frameworks needed to build and monitor that trust."

Changing priorities over time

And as marketers progress on their AI journey, their priorities evolve. While Observers and Planners prioritize governance and data privacy, Adopters also prioritize internal trust and ethical implications for AI.

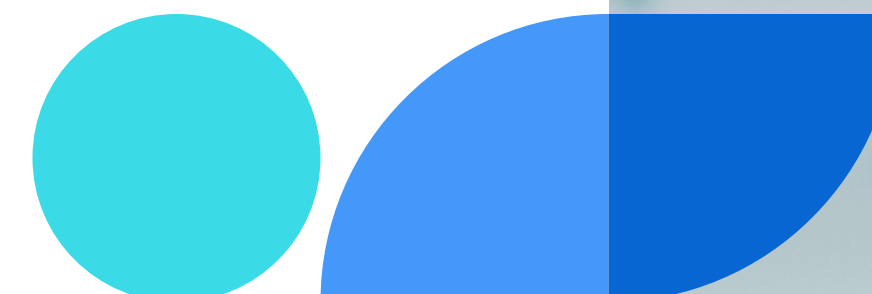
What a good governance framework looks like

Agentic AI governance should be an integral component of a broader AI governance initiative that provides a framework of policies, procedures and ethical standards to oversee the entire life cycle of artificial intelligence systems – from development to deployment.

This governance framework should promote **responsible innovation** while ensuring AI technologies are safe, fair, transparent and accountable. The framework should also mitigate risks, such as bias and privacy breaches, while fostering trust and aligning with human values.



Tip: Implement an AI governance framework that categorizes AI risk levels and implements controls (risk management); mitigates bias and promotes transparency (ethical principles); follows data privacy regulations (compliance and privacy); and defines clear responsibilities and auditing mechanisms for AI decisions (accountability).



STEP 4 Ensure trust by keeping humans in the loop

It's clear from our research that marketers have spotted one possible safeguard for the risks inherent in AI deployment. Collaborative approaches that keep humans in the loop (HITL) are the key to successful projects.

Trust is a must for agentic AI

While a significant majority of marketers (90%) trust agentic AI to some extent, it's conditional on human oversight, with only 5% expressing full trust. Nearly half of marketers (48%) believe humans should approve AI-generated decisions.

Adopters (36%) are more likely to say that human override features increase their trust in AI tools.

Human-centered decisions matter

MIT Sloan professor Sinan Aral advocates strongly that organizations embrace a human-centered approach to decision-making as **research indicates that AI agents can struggle with tasks that are usually easy for humans.**

Plus, agent decision-making is poorly understood. "You have to make sure the agentic decision-making is aligned with a human-centered decision process," Aral says.

Scott Brinker concurs and notes that "the reason we embrace a lot of this technology is because we want to meet customers where their expectations are."

AI isn't simply about turning everything over to machines. Some of the things that we've seen really make significant strides forward are due to AI being used behind the scenes to help humans better serve other humans.

Scott Brinker, MarTech analyst, advisor and author

AI is central to this mission, not just automating interactions but empowering humans to deliver better service. Brinker adds, "AI isn't simply about turning everything over to machines. Some of the things that we've seen really make significant strides forward are due to AI being used behind the scenes to help humans better serve other humans."

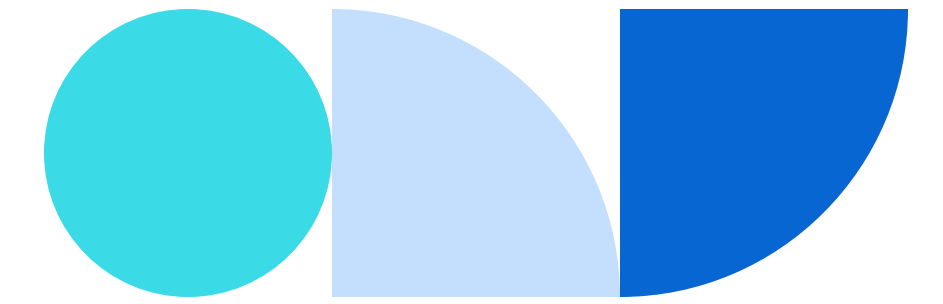
HITL guardrails improve trust

Some human-in-the-loop guardrails to consider implementing include:

- **Building in fallback processes** that allow humans to take control if the agentic AI agent fails.
- **Placing controls** on the types of queries the agent can access.
- **Installing checkpoints or processes** that require human approval before a task can proceed or be completed.



Tip: Acknowledge that agentic AI won't replace marketing professionals' judgment. The human-in-the-loop safeguard is essential to both the success of the agentic AI initiatives and to fostering trust throughout the marketing organizations implementing them.



Prepared to move forward with confidence

The advice from industry analysts and experts is conclusive: There's only so much you can do in your head. To truly understand what's possible with agentic AI, you need to get your fingers on the keyboard and start experimenting.

Remember: The only way out is through

By prioritizing existing workflows, embracing iterative learning and using AI for research and analysis, marketers can accelerate their journey from experimentation to full-scale integration.

Here are three key points to zero in on as marketers begin or further their agentic AI journey:

- **Use case focus.** Start with high-impact use cases that deliver ROI and build confidence in agentic AI.
- **Autonomy with boundaries.** Define how much decision-making power agents should have and build in safeguards.
- **People still matter.** AI oversight, training and human collaboration are key to long-term success.

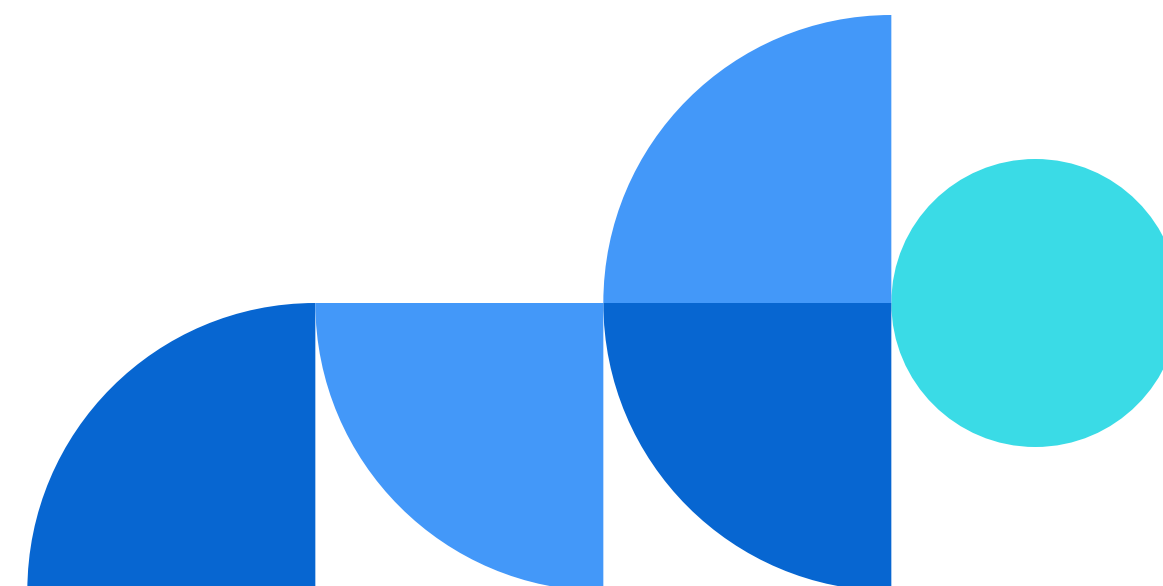
To scale AI effectively, leaders must have a blueprint. A well-defined strategy that prioritizes productivity, performance and trust is critical.

Manisha Khanna, Product Marketing Lead for AI and Emerging Tech, SAS

Ready to take the next step

As marketers prepare to take the next step with agentic AI, readiness is what makes the difference. SAS helps marketing teams build the right foundation – combining strategy, trusted data, governance and human oversight – so agentic AI can be applied confidently and responsibly.

With the right approach in place, marketers can move from experimentation to results and use agentic AI to drive smarter, more connected customer experiences.





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