

A NO-BS REPORT

The state of AI in CRM in B2B





IN OCTOBER 2024, GARTNER SAID:

"By 2025, AI will be a standard component of CRM platforms, fundamentally changing how companies interact with and understand their customers."

So were they right? Not quite...

According to our survey of 247 sales and marketing leaders, as of November 2025, AI in general is popular – **91% are regular AI users.**

But, at the same time, adoption of AI tools within CRM systems remains low (**38%** of respondents use it to some degree, and just **17%** use more than two features).

Is it 'fundamentally changing how companies interact with and understand their customers' for these early adopters, though?

And should other CRM users jump aboard? Let's find out.



Executive summary

This research zooms into how business-to-business (B2B) firms are adopting AI tools, and whether this is inside or outside of a CRM.

AI and CRM have a larger potential for improving commercial outcomes in B2B organizations, as their commercial success hinges heavily upon the relationships between sales teams and their business customers in a way that is less pronounced in B2C enterprises.

The research focuses most heavily on **mid-sized organizations**, which have between 50 and 1,000 employees, and which generally have less internal resources than enterprises for new projects, but can move faster.

It looks more deeply into whether mid-sized firms:



Are taking advantage of new AI tools inside or outside of their CRM system.



Are seeing a difference in productivity and performance (those which have integrated AI with CRM).



Are seeing a difference between those which have enabled one or two tools, or those that have gone further.

Workbooks ran an independent market research survey during October 2025 to answer these questions.



Executive summary

HIGHLIGHTS

The story so far with AI and CRM



Limited CRM AI adoption to-date

The adoption of AI functionality within CRM systems to-date is limited to about **38%** - far less than the **91%** adoption of AI for other purposes, by the same people (C-suite and sales/marketing leaders from midmarket B2B organizations – see appendix).



Lack of internal expertise was the main barrier

Those who have successfully unlocked the potential of AI in CRM say internal expertise was the main barrier (cited by **49%**), but the degree of impact they have enjoyed suggests they have successfully found this expertise externally.



Early adopters are seeing benefits

Most notably increased productivity (the most highly scored benefit at 2.3; 3 = substantial impact, 0 = no impact).



There are signs of a correlation between the number of AI features adopted and the impact on productivity

Those using more than half of the listed features rate the impact as 2.6 and those who have only used one feature, 1.9 (3 = substantial impact, 0 = no impact).



Executive summary

What's working (according to the early adopters)

AI in CRM needs context

It's clear that successful deployments implement AI in a way that's specific to an organization's tech stack and cultural context, rather than simply using the functionality out of the box.

It's not just about turning it on

Practices such as thorough training of AI, sensitively addressing internal resistance, cleansing the dataset, integration with other platforms, and not rushing the process, all contribute to a greater likelihood of AI-led CRM deployments becoming success stories.

What future plans do people have?

62% of respondents intend to increase their use of AI in CRM in the next year.

Hampering increased adoption is often the legacy CRM system

22% of those looking to adopt AI in CRM for the first time in the next year say their current CRM system doesn't support this.

CRM vendors have a key role to play

CRM vendors have a part to play by providing the missing expertise, building in privacy and security safeguards, and ultimately (one of the most requested features, selected by 36%) helping to prove the ROI to sceptics.



What is AI being used for in CRM?

When we listed the most popular AI-based tools/features within CRM systems, each of them saw dismal adoption levels, dragged down by the low overall adoption of AI in CRM.

The table below lists common AI features offered by CRM platforms, sorted by popularity (highest on the left), alongside the figures for how interested respondents were in terms of adopting them next.

Adding AI to lead scoring functionality (which has been around without AI for many years in various guises) is the most used tool, but AI for customer service, email outreach and content generation will likely be the most popular in a year or so:

FEATURE	DESCRIPTION	ADOPTED CURRENTLY	MOST INTERESTED IN ADOPTING NEXT
AI Lead Scoring	Where AI improves sales performance by prioritizing leads by value and likelihood of conversion.	15%	57%
AI Co-Pilot for Sales	An AI tool that supports sales teams to maximize conversions through email assistance, CRM insights, content creation, etc.	13%	25%
AI Predictive Analytics	Harnesses AI to subject large data sets to various statistical techniques that will yield evidence-based predictions.	13%	3%
AI Automated Email Outreach	Where AI supports users in generating/sending emails to improve campaign efficacy.	12%	41%
AI Content Generation	Generative AI responds to user prompts to create text, image, audio or video content.	11%	48%
AI Chatbot – Website / Customer Service	An AI tool that provides dynamic responses to customer queries and supports issue resolution.	9%	39%
AI Reporting & Forecasting	A tool enhancing strategic decision-making by using dynamic forecasts that adapt in real time to varying conditions.	9%	35%
AI for Customer Service	Enhanced AI tool that automates resource-intensive tasks such as online chat, email composition, call transcription and case management.	6%	54%

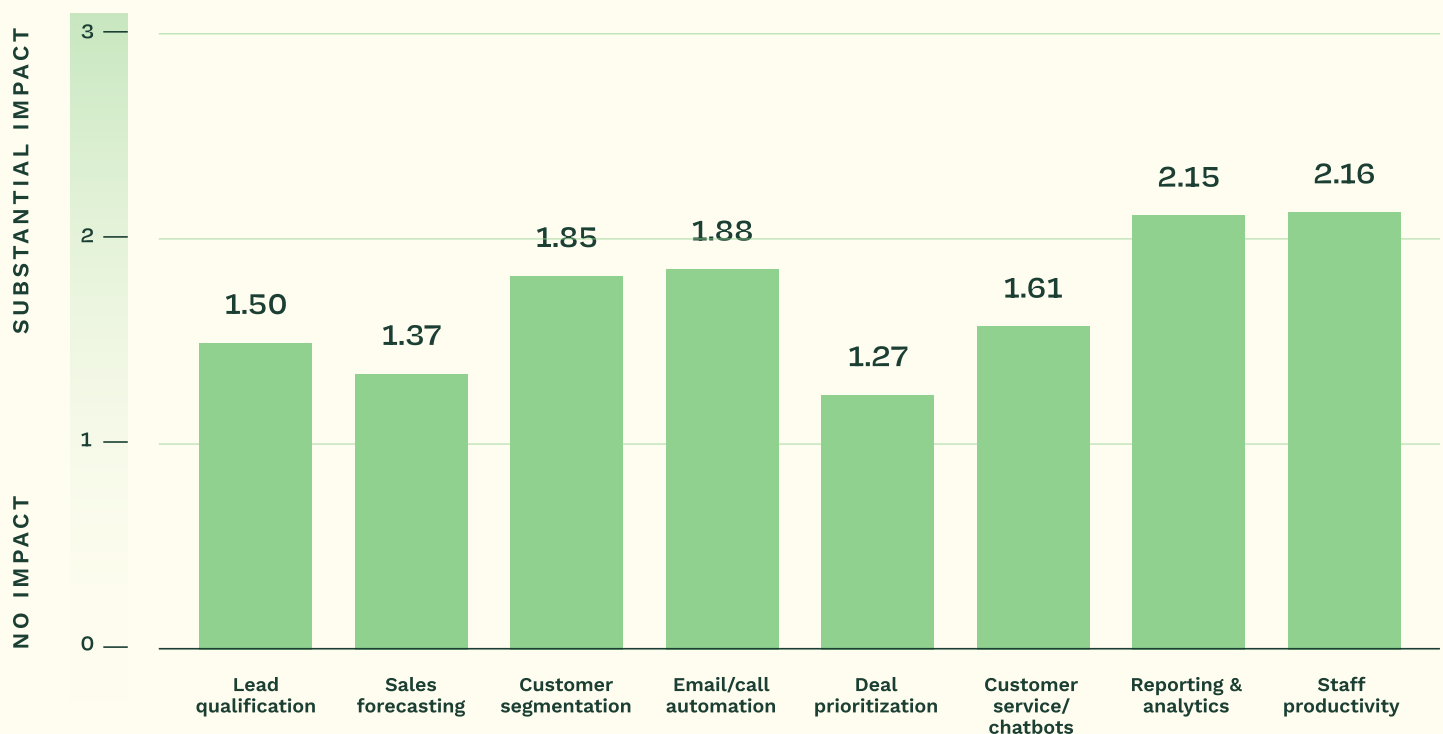


Are early adopters benefiting?

We asked AI in CRM adopters to quantify the impact these (and other) tools were having on their sales and marketing productivity. The average impact cited for this broad question was between 'significant' and 'substantial'.

Separately, we drilled into the impact on specific areas within the function such as reporting, automation, and lead qualification. The average score for each area of impact can be seen below:

How much impact has AI had on each of the following performance areas within your sales and marketing operation? (AI in CRM users only)





Are early adopters benefiting?

One respondent (UK, Sales Manager and AI in CRM adopter) commented:

“ AI unlocks efficiencies for our business that help us compete better”.

→ But does this additional productivity and efficiency translate into improved performance?

For respondents, the responses were validated by a separate question which concluded that 88% said it is valuable ‘in helping your sales/marketing teams improve performance’, with 38% saying ‘very’ or ‘extremely’ valuable.

A feature and impact area we’d like to highlight here is ‘AI Reporting and Forecasting’. As mentioned earlier, this has low current adoption (9%) but very high likely future adoption (35%), which implies that survey respondents recognize its critical role in business planning and decision making – particularly important during these challenging macroeconomic times.

Yet the low impact score above (1.4/3) suggests that early implementations aren’t quite hitting the mark.

If done well, this has the potential to create a far more meaningful and actionable sales and marketing funnel by automating the analysis of numerous data sources.

It is a great example of where just turning the feature on ‘out of the box’ doesn’t appear to be the right approach – those considering it should reach out to their CRM vendor, or external consultants, to ensure the process automation and reporting is aligned to their unique needs. And these do tend to be very business-specific.

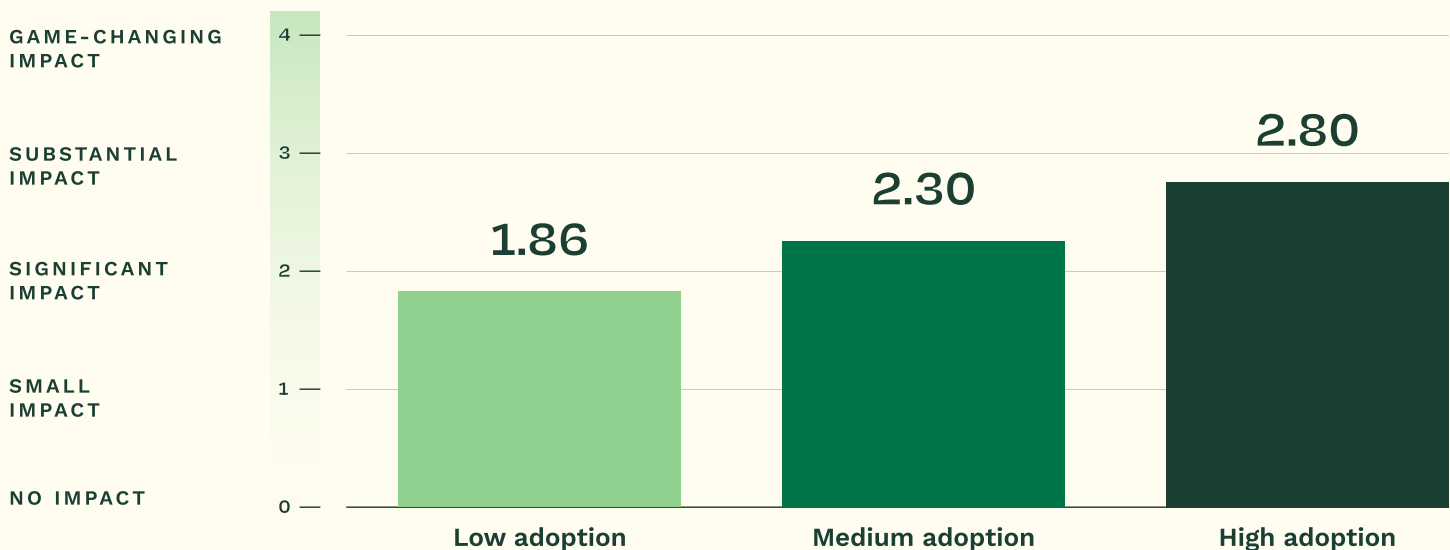


Is it a case of 'the more features the better'?

When we compared the scores for those who used just one feature (low adopters), with those who used two or three features (medium adopters) and those who used four or more features (high adopters), a pattern emerged.

All levels of adoption experienced significant impact, with those adopting more features more likely to describe this impact as 'substantial'.

Impact on staff productivity vs. degree of feature adoption



To illustrate how blending functionality together delivers combined impact, here is an example from a UK IT manager:

“ AI-powered tools helped us identify high-value leads, reduce response times, tailor communications, and identify trends in customer churn and campaign performance that we may have otherwise missed.”



Was adoption easy?

There are several components involved in adoption. To differentiate them, we asked about seven of the biggest factors and compared the scores of those who had made the change (and testified to their experience), versus those who had not (and testified to their fears).

Interestingly, there was agreement between both camps.

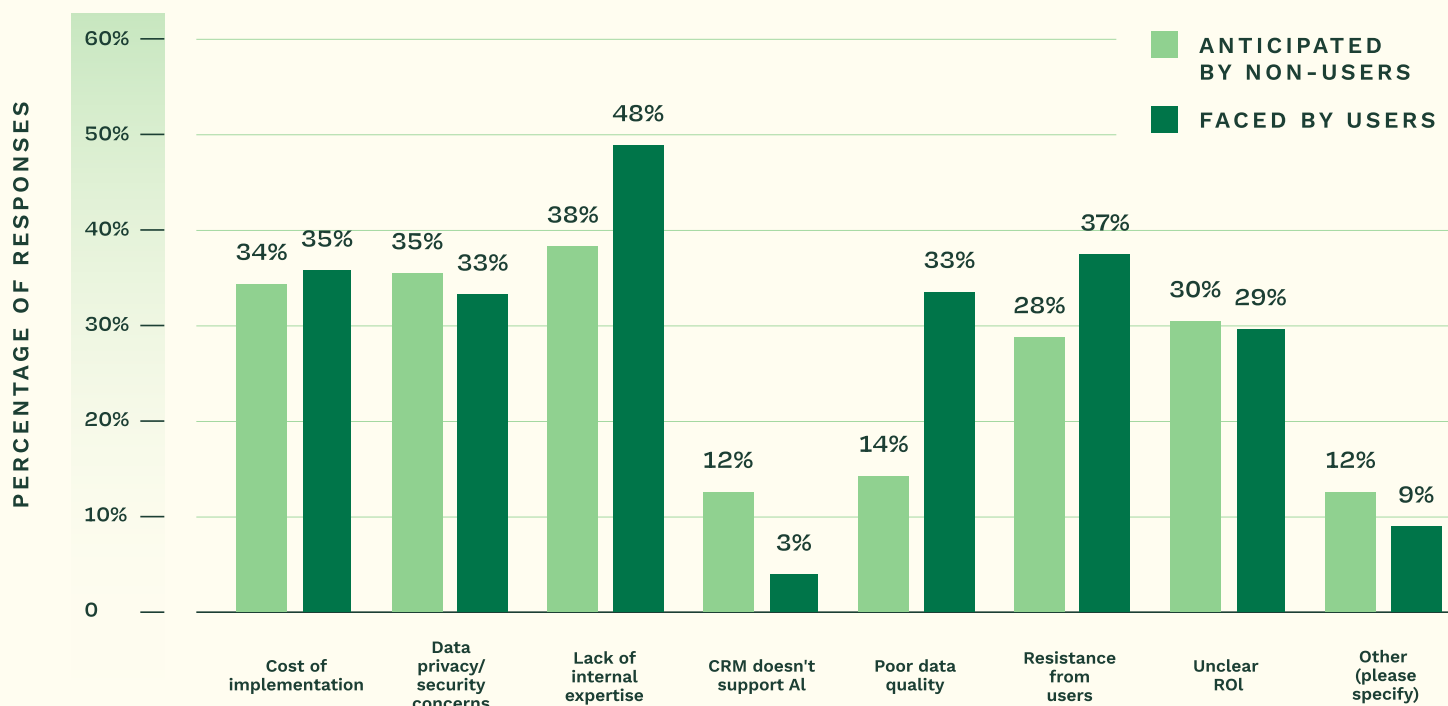
01

The primary challenge to adoption was a lack of internal expertise.

02

The second most significant problem was user push-back, which is often a challenge with technology deployments more broadly. Training and stakeholder engagement is key here – see ‘top tips’.

Q18 What are the biggest challenges you've faced / anticipate facing with using AI in a CRM?





Top tips: The lessons learned by those who have embraced AI in CRM

What can you learn from the experiences of early adopters? The most popular theme related to taking a strategic approach. For example:

“ Know what you want out of the system prior to research, it is a deep rabbit hole with many promises made and few kept. See where you have weakness in your implementation of a CRM and look for a single AI solution, then expand as you see other opportunities”

USA, MARKETING LEADER

“ Streamline the things you already do efficiently and use that knowledge to train the AI. Don't train AI to do something you can't do yourself.”

UK, MARKETING MANAGER

“ The key is not to hurry into something that is not adequately trained; deadlines are great, but not if they sacrifice excellence.”

UK, SALES MANAGER



Top tips: The lessons learned by those who have embraced AI in CRM

The second most popular theme relates to the cultural dimension.
A UK-based Commercial Director said:

“ It has to be a top-down commitment, with bottom-up understanding and support. You need to change both culture and processes to fully embrace AI. But don't be scared – it's a support service, not a takeover.”

There was also an excellent tip from a USA-based Sales Leader regarding data:

“ It's important that your foundational data is clean and for some AI models you will need to train them extensively to obtain clear themes when interpreting complicated messaging. We continue to centralize content generation through a central team even though AI is used to prime initial messaging, a human is still used to evaluate message content and relevance.”



Why are AI users not using AI in CRM?

Along with the perceived challenges, three other themes emerged as barriers to adoption:



Time

The most popular adoption timeframe is the last six months. It is clearly a very new thing for most, so we are still among the innovators and early adopters. A later question asked, “Do you plan to increase your use of AI in CRM within the next 12 months?” **62%** said ‘yes’ and **5%** said a categorical ‘no’.



Support from their existing platform

Of the **61%** of respondents that are not using AI in CRM, **22%** of these non-users (**14%** of all survey respondents) plan on adopting AI in CRM in the next year (as per point one), but they say their current CRM system doesn’t support it. This suggests that AI functionality could be a major driver of people changing their CRM systems – something organizations previously shied away from.



Data reliability

Data quality was identified as a key challenge earlier (referencing data within the system and business), but there are also concerns in response to the separate question: “How confident are you in the accuracy of AI-generated insights in your CRM?” Here, the most common phrase used was ‘somewhat confident’. Hardly a ringing endorsement.





What would make people more likely to adopt AI in CRM?

The research shows that AI in CRM is slower to hit the mainstream than other AI tools, but the industry could do more to facilitate adoption.

The main wants from those who have not yet adopted AI in CRM are:



44%

More proven ROI

38%

Better integration with existing tools

40%

Easier setup/user interface

29%

Stronger data privacy controls

33%

Lower cost

The future

We asked, 'Do you plan to increase your use of AI in CRM within the next 12 months?'



62% said 'yes'.

We are clearly still early in the technology adoption curve for AI in B2B CRM, about to see a major uptick in adoption.



Conclusion



AI in CRM is already changing how organizations engage with their customers and delivering benefits to early adopters – all without substantial pain in terms of change.

As AI tools continue to evolve, the benefits will increase at the same pace – whether this is operational benefits like improved reporting and reduced administration, or improved customer interactions, which will become more intelligent, predictive, and personalized.

Success will ultimately be measured in terms of achieving more for less: more customer acquisition, and more customer retention, for less time and money. In other words, eventually, and more likely than not, achieving the fundamental change that Gartner predicted.



Appendix: who was surveyed?

Geography

The survey received 247 responses, with an almost equal split between US and UK respondents.

Role /Responsibility level

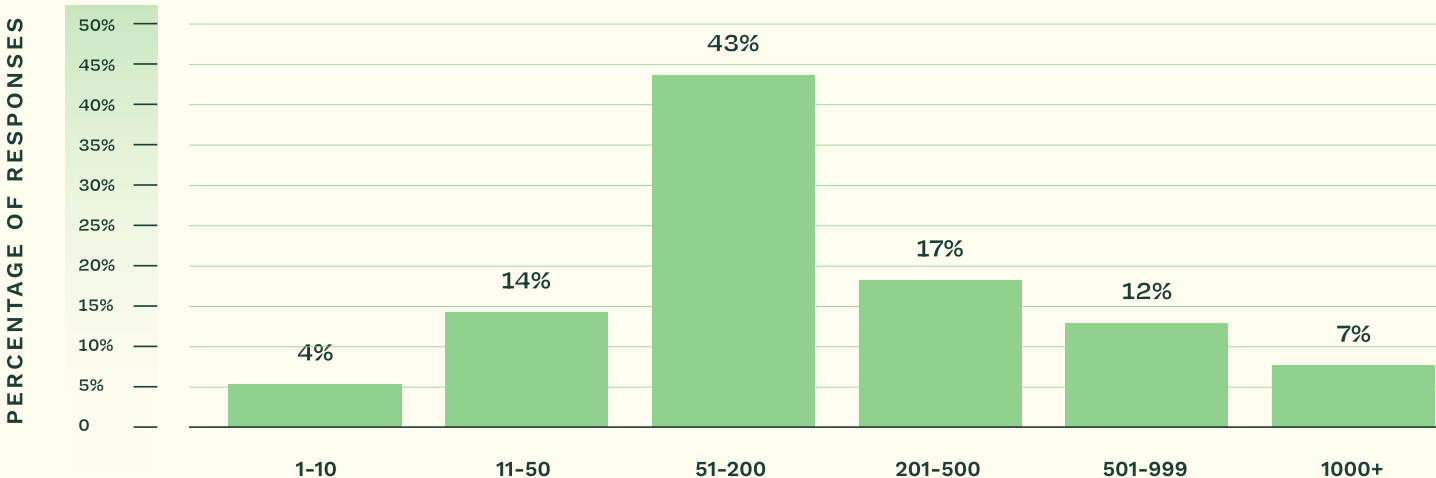
Those taking part in the survey were weighted towards those in marketing roles (44%), with ‘Marketing Leader’ being the most common role at 34%.

Sales (mostly leaders) represented 22% of respondents, CEOs/ Founders were 9%, and tech roles like CRM Administrator represented 5%.

Company size

- 1-10: 4%
- 11-50: 14%
- 51-500: 61%
- 501-999: 13%
- 1000+: 7%

Q6. What is your company size (number of employees)?



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