Pexiva TECHNOLOGIES

Enterprise rigor, right-sized for the mid-market.

PEXIVA PERSPECTIVE · CRM INTEGRITY & FINOPS

Why most CRM programs fail on *data, not features*—and how to fix it.

Mid-market companies rarely fail with CRM because they lack features. They fail because data is inconsistent, integrations are brittle, and adoption is uneven—and AI agents now layer fresh cost and governance complexity on top of an already shaky foundation. Clean data and cost discipline have become the same problem.

Up to 70%

of CRM initiatives fail to meet their objectives

Industry research, 2026

43%

use less than half the CRM features they pay for

CSO Insights

37%

lose revenue directly to poor CRM data quality

Validity, 2025

76%

say less than half their CRM data is accurate & complete

Validity, 2025

$12.9M

average annual cost of poor data quality per organization

Gartner

~$0.10

metered cost per AI agent action under consumption pricing

Salesforce, 2025

01 Why CRM really fails

CRM rarely underperforms for lack of capability. It underperforms because the foundation beneath it is unreliable: duplicate and incomplete records, brittle integrations, and inconsistent fields that quietly erode every report and workflow built on top. Industry estimates put the share of CRM initiatives that miss their objectives anywhere from roughly 30% to as high as 70%—and the root cause is consistently weak data quality and uneven user adoption, not missing functionality.

The damage shows up as a predictable trio:

- **Revenue leakage** — bad data routes the wrong follow-ups, misses renewals, and skews the forecast leadership relies on. Roughly 37% of companies report losing revenue directly to poor CRM data quality.
- **Avoidable spend** — teams pay for seats, editions, and add-ons they never fully use; about 43% use less than half the features they already license.
- **Eroded trust** — when reps don't trust the data, they stop using the system, and adoption—the single most-cited cause of CRM failure—quietly collapses.

02 Why this matters now

Every major vendor is pushing autonomous AI agents deeper into sales, service, and operations workflows. Those capabilities depend entirely on reliable data, clean process design, and disciplined cost control. Without that foundation, organizations don't just stall—they scale their bad data, multiply inconsistent outcomes, and lose visibility into what they're spending.

The economics have changed materially, too. AI agent capabilities are no longer priced per seat. Salesforce's consumption model (Flex Credits, introduced May 2025) meters each agent action, converting a predictable subscription line into a variable cost that scales with how often agents run. Vendor pricing pages do not capture true deployment cost, because data readiness itself drives spend: an agent reading duplicate records or stale knowledge produces unreliable output—and burns metered actions doing it.

> **Dirty data makes consumption-priced AI both wrong and expensive. Integrity and cost discipline are now the same problem.**

03 What PEXIVA delivers: two pillars

PEXIVA fixes the underlying conditions—the layers most platform vendors and implementation partners leave behind—before they compound. The practice is vendor-neutral by construction: the assessment model, integrity rules, and cost framework are expressed against a portable CRM data-and-cost schema, then mapped to each platform at delivery time.

Pillar 1 — CRM Integrity

Make the CRM trustworthy enough to run the business on, and clean enough to run AI on.

- **Data quality assessment** — baseline duplication, completeness, field consistency, and cross-system drift.
- **Migration validation** — pre- and post-migration checks so replatforming or consolidation doesn't carry the rot forward.
- **Deduplication & field normalization** — structured reduction of duplicate records and standardized critical fields.
- **Enrichment controls** — governed enrichment that improves match and completeness without introducing unverifiable data.
- **Downstream reliability** — integrity tuned so reporting, automation, and AI agents produce dependable output.

Pillar 2 — CRM FinOps

Align CRM and AI spend with measurable value, and keep variable AI consumption forecastable.

- **License rationalization** — identify paid-for seats, editions, and add-ons that are underused or redundant.
- **Utilization mapping** — measure what's actually used against what's licensed.
- **AI consumption governance** — model, forecast, and control action- and conversation-based agent economics before they become opaque.
- **Cost-to-value alignment** — tie platform and AI spend to defined business outcomes rather than headcount or hype.
- **Agent Trust & Safety** (scoped add-on) — govern which external tools and MCP servers agents may reach, defend against tool-poisoning and injection, and maintain full audit trails.

Where adoption fits. Adoption is the single most-cited cause of CRM failure—so PEXIVA treats it as the outcome both pillars are engineered to produce, not a separate change-management product. When reps trust the data and leadership trusts the cost, the system gets used. We measure adoption lift as a result and partner with your enablement function rather than displace it.

04 How we deliver — and how we prove it

A four-phase engagement built for mid-market scope, without enterprise-consulting overhead. Every phase produces an artifact you own and can act on independently of PEXIVA.

- **Baseline (1–2 weeks)** — measure current-state integrity and spend. Outputs: data-quality scorecard, license/utilization map, AI-consumption baseline.
- **Diagnose (1 week)** — prioritize issues by revenue and cost impact, with effort/value scoring.
- **Remediate (2–6 weeks)** — execute deduplication, normalization, migration validation, license rationalization, and consumption guardrails.
- **Govern (ongoing, optional)** — install a recurring integrity and cost-governance cadence so gains hold instead of decaying.

Measured, not promised. PEXIVA reports against baselined metrics—no claim ships without a before/after number. We track duplicate rate, field completeness and match rate, migration pass rate, active-usage/adoption, reporting variance, license and feature utilization, and AI credits or actions per workflow. Targets are set per client against the Baseline phase; we don't publish fixed guarantees in place of measured results.

Vendor coverage — proving "agnostic."

Full-suite: Salesforce, Microsoft Dynamics 365, HubSpot, Zoho, Oracle, SAP, Creatio • **Lightweight:** Pipedrive, Close, Copper • **Open-source:** SuiteCRM, EspoCRM, Odoo, Twenty • **Transition states:** consolidation, replatforming, AI-workflow expansion. **No platform lock-in. One accountable partner. Depth behind the delivery.**

Start with a CRM Integrity & FinOps Baseline

A short, expert-led assessment of your CRM data quality, licensing, and AI-consumption exposure—scored against a clear model and prioritized by revenue and cost impact. You keep the scorecard and action one-pager whether or not we engage further.

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SOURCES

1. CRM initiative failure rate (~30–70%; root cause user adoption and data quality, not features) — synthesis of multiple 2026 CRM-statistics references.
2. CSO Insights — approximately 43% of CRM users use less than half of their system's features.
3. Validity, "The State of CRM Data Management in 2025" (n=602) — 37% lose revenue directly to poor data quality; 76% say less than half their CRM data is accurate and complete.
4. Gartner — poor data quality costs organizations an average of $12.9 million per year.
5. Salesforce — Agentforce Flex Credits consumption pricing (announced May 2025); agent actions are metered (about $0.10 per typical action), with data readiness driving true deployment cost.

All figures are drawn from the named third-party research above and are current as of publication. PEXIVA Technologies cites these sources for context; they are directional, not guarantees of outcome.