Re(AI)magine Conversations

Building Intelligent, Invisible CRMs with GenAI

Ashish Shajapurkar, Tim Willemsen and Nelson Rodriguez

Ashish Shajapurkar: Hello everyone and welcome to Re(AI)magine Conversations where we explore AI technology and bold thinking, which are transforming the enterprises. I'm Ashish. I'm your host today. I'm the Senior Vice President for the Microsoft Business Unit at Persistent.

In each episode, we sit down with change makers, right from industry leaders to tech disruptors, to uncover the real stories behind innovation, whether it is re-imagining how we build software or how we serve customers. Or how we make decisions. This is where the future takes shape, and this is what Re(AI)magine Conversations is all about.

In today's episode, we are exploring how GenAI is redefining customer relationships, how we interact with customers, and how customers interact with us, turning traditional CRMs into more intelligent adaptive systems that can understand intent, emotion and context in real time.

So, let's dive right in! Joining me today are two incredible voices shaping the future of customer engagement. I'm joined by Tim Williamson. Tim is the manager of IT applications at Medline, responsible for IT systems and processes across sales, e-commerce, customer service, marketing, etc. Medline is a global healthcare company, manufacturer and distributor of medical and surgical supplies to the healthcare providers worldwide.

So Tim, we'd start with you. Would you love to share more about your role? How do you spend your day making it simpler and smoother for your stakeholders internally and externally?

Tim Willemsen: Thank you, Ashish. What you say is right. I work as manager IT applications, responsible for customer service, sales, e-commerce and marketing.

I even have an internal role, managing our internal Medline customers, including Medline employees. I would say the most important part of my role is to listen carefully to my business owners, listen carefully to business and make sure that I try to translate all their wishes and their needs into the best IT solutions so that they can do their work, their daily work.

So I try to be as close as possible to business, and really understand them. That's the most important part of my job.

Ashish Shajapurkar: Wonderful! Welcome to the podcast, Tim. And we also have got Nelson Rodriguez from Microsoft, who is the product go-to-market leader for AI business processes in the North Americas.

Nelson, tell us a little bit more about your role. How are you helping to make AI a bigger part of experience for your customer centre partners?

Nelson Rodriguez: Yeah. My job is a complicated job in the sense that Microsoft is a complicated organization and we serve so many companies across the world. My team is responsible for the Americas.

I work explicitly on the dynamics business, and we have three jobs on my team. The first job is to make sure that we understand the products, not from a technical perspective, but from a customer utility perspective. Why are these products useful and helpful for customers?

The second job is to help salespeople find the right tools and information across our company to make it easier for them to have good conversations with customers and help customers solve problems.

And then, the third thing we do is we interface with customers both online and also in person. This includes speaking at events and interacting with both customers and partners, which for me is one of the most exciting parts of the job because we get to see what our work really means in real life when we're out there with customers.

Ashish Shajapurkar: Wonderful! Welcome to the conversation again. So, Nelson, we'll start with you. CRM has been around for decades. But the real question is how is it transforming to deliver truly intelligent, predictive insights and the complete 360-degree view of the customer?

So how do you see CRMs evolving from a system of record to the system of intelligent and now system of action for customer relationships?

Nelson Rodriguez: Yeah, I'm reminded of a time about 10 years ago when I was at a big analyst conference on stage. The whole point of the conference was that salespeople were going away, that in a couple years there would be no salespeople and everything would be handled digitally and in an automated way.

It was really about the power of Big Data. I think at that moment, the notion was Big Data was going to make it possible for every customer to make every decision on their own. And obviously customers are much smarter than they've ever been, and they're able to access information in a way that they've never been able to access before.

But in some ways, there's almost too much data and there's almost too much inference without that human element being involved. And so, of course, the job of a salesperson has never gone away, but the role of the CRM has continued to get more and more nuanced and in some ways complicated, but in other ways.

I think the job of CRM, or the evolution of CRM is to make itself simpler and less visible to everyone who's interacting with it. So that the core experience of a CRM is for a seller to understand a customer well and for the customer to feel that. That to me is what CRM evolution has been.

Ashish Shajapurkar: So Tim, from your perspective at Medline, how has deeper understanding of customer intent changed the way you and your teams engage with your customers, whether it is in sales, marketing or customer service?

Tim Willemsen: We achieved one of the most impactful changes during the Dynamics CRM case management project by redefining how we handle our customer inquiries. What we did is together with our (Madeline) customer service leadership team, our partner organization, Persistent, and us, we analyzed all the incoming customer requests across the market. So, whether it's an order entry, whether delivery issues, billing questions, whatsoever with the goal of leveraging AI driven functionalities for automatic classification.

This capability enables us to respond in a way that is professional, targeted and fast, ensuring that every interaction is managed in a structured and consistent manner. In the short term, we will also introduce Co-pilot's summary function, which allows the customer service employees to see concise contact rich summaries of cases. And this feature will help, the team to grasp the full history of the customer interactions without going through all the lengthy threats, saving time and of course also minimizing errors, combined with automatic classification. It creates a more efficient workflow and supports for better decision making.

The result is not only faster response times, but also greater relevance and personalization in our outreach. Customers benefit from quicker resolutions and communication that feels tailored to their needs. Ultimately these enhancements also strengthen trust and elevate overall customer experience.

Ashish Shajapurkar: Wow! What a great example of context, intelligence and the human elements coming together, right? When CRMs really start predicting what matters most to the customers, that leads to make the systems better, intelligent, modernized and contextual, right? Every company talks about modernization, but the urgency feels sharper now than ever before. Nelson, what is driving the

current way of CRM modernization? What are you seeing in the market? What do you hear from your customers and why is it more strategic now than before?

Nelson Rodriguez: I think reality is driving modernization. You know, we think about modernization sometimes as a quirk or a gimmick of technology. I like to think of it as it as a highway trip. We've got a road trip we want to take. We set a destination and we're going to modernize our way to it. The truth is that modernization is more like sailing. The seas change. The winds change. You do your best to try to kind of take advantage of the circumstances that you're in, but you're constantly having to adapt to the world as it changes. So as you seek to modernize, the world is modernizing around you.

Modernization for us within CRM means that customers have different expectations about what companies know about them. Salespeople have much more complicated patches of business that they have to manage. Just managing flows of information is more complicated.

So, modernizing has meant figuring out how to tame data. It's meant figuring out how to adapt to the expectations of customers in terms of what those interactions look and feel like. And it changes every day. You know, we think we come up with a new perfect solution for what customers want in terms of their interactions, and then it changes. Customers get grow tired of a way that we're doing things and we have to continue to adapt.

So that, I think, at least at Microsoft, has constantly shaped the modernization that we drive and what we see our customers doing.

Ashish Shajapurkar: And Tim, how does the urgency of modernization show up in the large organization like yours, where legacy systems are fragmented, workflows are still discreet, and that's a very common pattern.

How are you dealing with it?

Tim Willemsen: In large enterprises like ours, these pressures often service as operational friction. So legacy systems that don't talk to each other, to communicate fragmented workflows across departments and silo data, which slows down the decision making, this complexity can turn even simple customer interaction into very time-consuming processes.

To address this, we transitioned to a connected CRM environment powered by AI. By integrating data across systems and applying AI driven insights, we've broken down silos between sales, customer service, and marketing. All information is now accessible in one place, creating one single source of truth. And this shift accelerates decision making. It also improves collaboration and it ensures every team works with complete, accurate data. The result eventually is faster, more informed responses and a seamless customer experience. Even within the complexity of our large enterprise, it's truly transforming the way you are re-imagining. You are connected, to a CRM with a future perspective.

Ashish Shajapurkar: Great example, Tim. And when you talk about the transformation, it's very easy to focus on the technology, right? But from my experience at Persistent, success often depends on the business of alignment. It is about agility and how well do you adopt. And adoption change management becomes a very critical part to the success of the entire transformation.

So, from your experience of driving the connected CRM modernization, what does it take to deliver a large transformation at pace and still keep it on track. How are you dealing with that in Medline?

Tim Willemsen: So, delivering transformation at pace, requires three key elements. You have alignment, you have engagement, and you have enablement. It always starts with strong leadership alignment and a clear vision that sets the direction and removes ambiguity. So, engagement means involving the business teams early and continuously to gather their feedback, to drive adoption and to ensure the solution meets the real work needs. This creates ownership and also keeps the stakeholders aligned throughout the full journey. Enablement focuses on equipping the teams with the right tools, training them and supporting them so they can confidently use the new CRM and of course, realize its full value.

Those three elements keep the transformation on track and accelerate success.

Ashish Shajapurkar: It's very heartening to see how you're transforming these three elements through your connected CRM journey. And Nelson, when you see from the Dynamics 365 platform perspective, how do you see these three elements of the journey cut across the apps platform.

What patterns do you see behind successful transformation where these three elements or more can come together?

Nelson Rodriguez: I mean, Tim made the perfect explanation in terms of what needs to happen within an organization, and we see it all the time. As you can imagine, we see hundreds and hundreds of organizations transforming, and we are transforming ourselves as a company.

And the key is, Tim talked about ownership, he talked about alignment, and I think the reality for all of us in all of our lives is that transformation is powerful and exciting when you drive it by choice. Transformation can be horrifying and something to resist if it is imposed on you. So, organizations that we see transform successfully, whether that's in a CRM or ERP space or really any technology, that transformation has to be led from strategy.

It has to be clear to the organization that they need to transform, why they need to transform and how they need to go about it; and then what benefit they're going to see. But it has to be visible to everyone involved. Anyone that you need to be a participant in transformation has to understand that. They need to understand that it has to happen, why it has to happen and the role that they get to play that makes all the difference.

You'll see organizations that buy technology and wait for the transformation to happen. They wonder, "But we bought the tool and how come the transformation didn't occur?" When you go and you talk to their teams, they say, "I didn't really understand it. No one really told me what I was supposed to do. You know, they never asked me, about this transformation."

That's the kind of thing you hear from organizations that are struggling to transform. It's not just about the new systems. But you know, essentially, it's all about how people, data, the different processes can come together, with the purpose of transformation.

Ashish Shajapurkar: Right. So, when it comes to Medline, Tim, let's talk about the human side of the change that you are seeing. You spoke about the connected system, the technology and the business side of the changes of three elements, right? When it comes to the human side of change, how do you approach the change management,or adoption of the new CRM mindset within your organization?

Tim Willemsen: First of all, what I wanted to say is that I am fully aligned with the answer that Nelson just gave. We also at Medline knew that real transformation would only happen if people feel like they are part of the journey. That's why we prioritize clear communication and consistently show the teams the "Why" behind our new CRM, basically behind all the projects that we do. So, we invested also in practical hands-on training and ensured that support was always accessible. Most importantly, I would say we gave the teams the autonomy to shape how they use the tool. And this is really crucial because this eventually turns adoption into true ownership.

And I think that cultural shift is what makes the technology stick.

Ashish Shajapurkar: Wonderful! Because as you rightly said, it's not just about the system, but how do you really bring the whole culture of the empowerment and adoption that matters. Nelson, I really like when you said modernization is a road trip. So, building on top of that adoption perhaps could be enjoying the driving experience on that road trip?

Nelson Rodriguez: Well, if I think about it again in terms of sailing, I think it's everyone having a job as part of it. Every person understanding that they have a role to play on this ship that you're steering. It makes it a lot easier for people to not just kind of sit on the sidelines or complain about or feel like they're being pushed around. That if everyone has a role to play in the transformation or in the modernization journey I just think you end up with a much better experience.

Ashish Shajapurkar: So, talk to us about how, a technology partner like Persistent can make the whole adoption journey much easier for our customers.

Or, how we can have the driving experience much smoother for our customers.

Nelson Rodriguez: Yeah. Well, I think what is important about an organization like Persistent is that the average organization goes through a major transformation once in two years, five years, or in 10 years, depending on the nature of your platform.

Organizations like Persistent see these transformations, these modernizations every day, every week, every month. So, you're going through experiences at scale that is going to be really hard for any organization to do on their own. And so having someone, having a partner who can be with you on that journey, I think it's super important.

Maybe if we keep mixing our metaphors, it's the G in GPS system that really understands where a lot of the positions are on this journey; and also even where the hazards are. That is the kind of thing that you don't want to test by yourself as a big organization, going through some big modernization project. Having somebody there with you, who knows it and is doing it all the time, I think it just makes a big difference.

We at Microsoft Partners believe this is so vital to us and we co-learn. We learn from partners and partners learn from us. It's a constant back and forth. Partners aren't waiting for Microsoft to land all the technology vision to them. We land a vision and then the partners say, actually, you know, we've noticed that customers are using our CRM a little bit differently.

We notice that an implementation is a little bit different than how it was maybe designed up front. That to me is what's so important about a partner like you.

Ashish Shajapurkar: Great insights. So when people feel the ownership, the CRMs stop being a software and it becomes pretty much interesting part of the journey of how.

An organization serves to their customers.

So now that brings us to the final part of our, Re(AI)magine conversations. Let's look ahead to the next decade of the CRMs. How it feels very different, feels more adaptive, self-learning, more intelligent and almost human in nature as both of you spoke about.

So Nelson, how do you define the CRM of the future as AI continues to evolve?

Nelson Rodriguez: Very, very rapidly, you know. Not in years, but in a quarter, months and days.

I have a son in college and my expectation is that when he's steadily in the workforce in 10 years, he won't know what a CRM is probably because it will be an invisible part of the data stack, or the tech stack, or the tools that his company is using, wherever he works.

I'm expecting he'll end up being a salesperson. He is a very compelling and convincing person when he is in that role. We know the technology will have advanced well enough when he's just in Outlook

and he's in Teams and he's communicating with customers and it's a natural experience rather than this sense that he's going to some discreet tool.

I think that invisible CRM is the perfect CRM of the future, and it's going to come. Largely in part because of GenAI, because GenAI has the tendency to, in very positive ways, make all technology invisible, and you're just having a conversation. You're just asking questions and you're getting information back rather than pulling up a spreadsheet, pulling up a SQL table. That's not how you think about when you're interacting with GenAI, or when you're interacting with something like Co-pilot.

Ashish Shajapurkar: Wonderful! Great analogy of invisible CRM. So, it's all about interacting with the CRM without knowing that there is a system behind doing all the intelligence and the whole measuring the entire customer engagement in a 360-degree manner.

Right. Tim, how do you see the whole evolution of invisible CRM as Nelson spoke about? Is it going to change the way you interact with your customers at Medline? How will the whole relationship change?

Tim Willemsen: You mentioned the new CRM thinks AI automation; but I think everything is fundamentally reshaping the enterprise customer relationship.

We're really moving from reactive support to proactive service, basically anticipating the needs before they even arise. I think this evolution creates deeper trust because the customers really feel understood and valued at every interaction. It's no longer just about speed.

It is about delivering smarter and also personalized experiences that feel human even at scale. By combining predictive insights with automation, enterprises can shift from transactional interactions to meaningful ongoing relationships where basically every touchpoint reinforces loyalty and confidence.

Ashish Shajapurkar: Wonderful.

Ashish Shajapurkar: Very nicely said. It is all about customers feeling understood, and as organizations, how we can be more human in interacting with the customer and truly serve the customers much better. Much more holistically, powered by the connected CRM, powered by the AI and the technology wave that we are riding on.

Wonderful! So, as we look ahead, it is very clear. AI is not just changing the CRM economy, but it is shaping a future where customers experiences are more predictive, personalized, truly intelligent.

Tim and Nelson, thank you for sharing your insights on how technology, culture, and leadership all come together to make CRMs not just intelligent, but more human and empathetic.

Right from system of record to system of collaboration, to system of understanding, to system of actions now. Right? That's the real evolution that we are seeing. Thank you both of you again for joining me at Re(AI)magine Conversations.

Tim and Nelson, viewers, thanks for joining this conversation.

If today's discussion spark new ideas, follow the series and spread it in your network. If you have a story to tell, or any guest you'd love to hear from, drop us a note at **podcast@persistent.com**.

This has been the Re(AI)imagined Conversation Series brought to you by Persistent where we explore the ideas and innovations which are shaping tomorrow's enterprises.

Until next time, stay curious, stay inspired. Thank you very much.

Re(AI)magining™
the World

About Persistent

Persistent Systems (BSE: 533179 and NSE: PERSISTENT) is a global services and solutions company delivering AI-led, platform-driven Digital Engineering and Enterprise Modernization to businesses across industries. With over 26,000 employees located in 18 countries, the Company is committed to innovation and client success. Persistent offers a comprehensive suite of services, including software engineering, product development, data and analytics, CX transformation, cloud computing, and intelligent automation. The Company is part of the MSCI India Index and is included in key indices of the National Stock Exchange of India, including the Nifty Midcap 50, Nifty IT, and Nifty MidCap Liquid 15, as well as several on the BSE such as the S&P BSE 100 and S&P BSE SENSEX Next 50. Persistent is also a constituent of the Dow Jones Sustainability World Index. The Company has achieved carbon neutrality, reinforcing its commitment to sustainability and responsible business practices. Persistent has also been named one of America's Greatest Workplaces for Inclusion & Diversity 2025 by Newsweek and Plant A Insights Group. As a participant of the United Nations Global Compact, the Company is committed to aligning strategies and operations with universal principles on human rights, labor, environment, and anti-corruption, as well as take actions that advance societal goals. With 468% growth in brand value since 2020, Persistent is the fastest-growing IT services brand in 'Brand Finance India 100' 2025 Report.

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