

# From manual data chaos to Salesforce-ready in minutes.



**How Navikenz built a six-stage agentic AI pipeline that eliminated ~80% of manual CRM data preparation for the world's leading events services partner.**



## CLIENT SITUATION

The client is the world's leading global events services partner, supporting hundreds of tradeshow, exhibitions, and live events across the UK and international markets. Its Salesforce CRM estate is the operational backbone for account management, sales reporting, and territory planning.

The sheer scale and heterogeneity of incoming exhibitor data had outpaced the firm's ability to process it reliably. The client engaged Navikenz to design and deliver a production-grade, AI-driven solution capable of replacing a largely manual and error-prone data preparation workflow with an intelligent, automated pipeline.

## THE CHALLENGE

### A data intake process that could not keep pace

Each exhibition cycle generated a new wave of exhibitor data files. Before a single record could be loaded into Salesforce, data stewards and account managers faced a time-consuming and error-prone remediation process. The work was repetitive, skilled, and entirely manual. The consequences were predictable. Transcription errors propagated directly into the CRM. Service zone and operations zone assignments were frequently mismatched, degrading the accuracy of downstream territory planning and sales routing.

Uploaded records arrived without the firmographic attributes. And without deduplication, bulk uploads periodically seeded Salesforce with duplicate account and contact records, generating reporting conflicts that were costly to unwind.

## OUR APPROACH

### A two-phase programme: clean and enrich, then automate the upload

- Phase 1 – The Agentic Data Preparation Pipeline
- Phase 2 – End-to-End Salesforce Upload Automation

## THE OUTCOMES

### Measurable gains across speed, quality, and operational scale.

The combined Phase 1 and Phase 2 delivery transformed the client's exhibitor data onboarding from a manual, error-prone operation into a fully automated, scalable capability.

The automated six-stage pipeline removed approximately 80 percent of manual data preparation effort, freeing data stewards and account managers from field-by-field Excel review and redirecting their time toward higher-value activities.

Phase 2 delivered substantial throughput improvements that scaled with file size. A batch of 100 records processed 1.6 times faster than the prior approach; at 723 records, the same pipeline ran more than ten times faster, reducing processing time from nearly five minutes to under thirty seconds.

The solution also carries strategic significance as the first deployed agentic AI application for the client's EMEA operations, establishing a proven architecture and delivery pattern that the business can extend to adjacent data intake challenges.