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ANZ launches agentic AI-powered CRM to transform business banking

ANZ is investing in its business banking experience by deploying Salesforce's Agentforce 360 platform within its new Customer Relationship Management (CRM) tool, the first bank in the APAC region to deploy this technology at scale.

The new CRM platform helps deliver improved customer outcomes and helps bankers work smarter and automate routine tasks. The rollout follows the release of ANZ's 2030 Strategy to deliver a simpler, faster bank which puts customers first. Alongside the nearly 50% increase in ANZ business bankers by 2030, the technology will support in boosting banker capability and productivity – allowing more time for bankers to focus on customers.

Replacing a legacy system, the new CRM consolidates data from 20 different platforms into a single, intuitive dashboard, significantly reducing the time spent navigating systems.

Now powered by Salesforce's industry leading agentic AI capability, Agentforce, the platform will carry out value-adding tasks, rather than simply providing information. Bankers will be able to access real-time account summaries – expected to save bankers the equivalent of around one working month per year – and a new chat interface will make searching for and accessing customer data easier and more insightful.

The deployment of Agentforce follows a successful national rollout of the new CRM across ANZ business bankers and frontline teams.

Clare Morgan, ANZ Group Executive, Business & Private Bank, said the platform will transform how ANZ Business & Private bankers manage customer relationships, and deliver better experiences for customers, brokers, and bankers.

“Our new platform is a game changer – simplifying systems, saving time, and helping bankers focus on what matters most: building strong relationships and helping customers run and grow their businesses. It’s one of several major investments we’re making to uplift our frontline and deliver on our customer-first strategy.

“We’re also accelerating our digital roadmap, bringing forward the launch of the ANZ Plus front end for most small to medium business customers to late 2027. That means a more seamless, connected experience for our customers on a market leading platform.

“We know running a business is hard. Our job is to make banking easy and simple.”

Agentforce will support automation of tasks, organise information, and streamline workflows. By supercharging the CRM to handle more complex, multi-step tasks, bankers can better manage data-enabled opportunity leads, visualise customer insights, and effectively prioritise daily activities.

Banker feedback is being used to shape the platform and its development, ensuring the CRM system and agentic actions and outputs are continually enhanced.

The rollout follows ANZ's recognition as Canstar's Small Business Bank of the Year for a record-breaking tenth time, and reinforces its leadership in business banking and commitment to supporting small-to-medium enterprises across Australia.

For more information on ANZ Business & Private Bank, visit the [ANZ Business Hub](#)

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