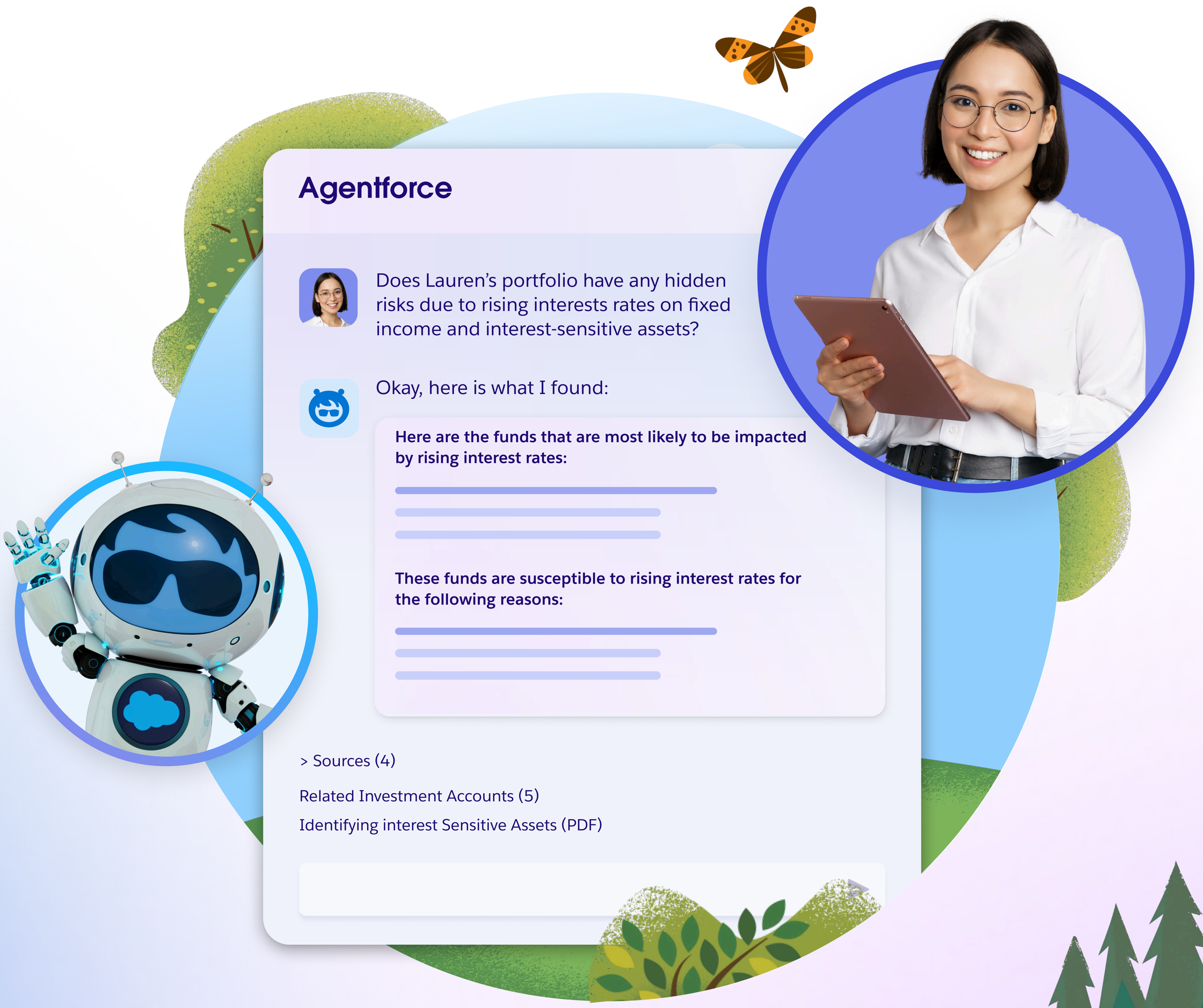
Grow Your Small Business with AI Agents

How autonomous AI can streamline and scale your business for efficient growth.



GROW YOUR SMALL BUSINESS WITH AI AGENTS

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Introduction

In today's fast-paced and competitive business landscape, staying ahead of the curve is more critical than ever. The key to sustainable growth lies in leveraging cutting-edge technology, and one of the most transformative tools at your disposal is autonomous AI.

According to our recent Small and Medium Business Trends Report, small businesses that adopt artificial intelligence (AI) technologies can see a productivity increase of up to 40%.

The truth is that AI agents are helping small businesses achieve levels of performance and scalability that were previously unattainable. What a time to be alive – and to be in business.

This e-book is designed to be your complete guide to understanding and implementing AI agents in your business. We'll break down the technology behind AI agents and how they work. You'll discover how AI agents can improve efficiency, reduce costs, and enhance customer satisfaction. And you'll get some actionable advice on how to integrate AI agents into your growing business and explore what it means for your future.

By the end of this e-book, you will:

- Understand the fundamentals of AI agents and their capabilities.
- Identify areas in your business where AI can make the most impact.
- Gain insights from real-world success stories and best practices.
- Build the knowledge and tools to navigate the future of AI in your business.

01 The Evolution of AI Models: Predictive, Generative, and Agentic

Artificial intelligence is here to stay and has become a cornerstone of modern business operations everywhere – fueling innovation, efficiency, and growth for businesses of all sizes. And there are different AI models that provide different values to business.

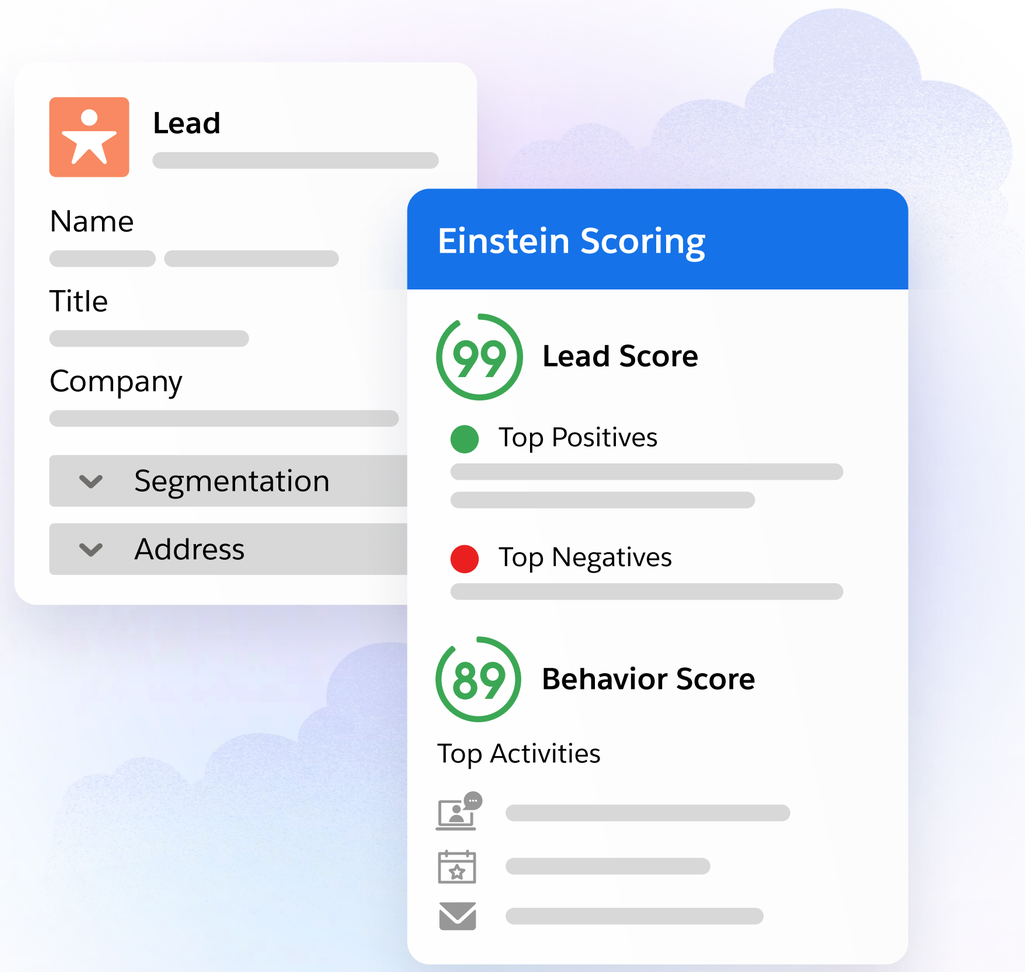
Understanding these different models of AI – predictive, generative, and agentic – can help you make informed decisions and harness the full potential of these technologies. As AI technology continues to evolve, understanding the different models of AI can help businesses stay ahead of the curve.

Let's cover the three key models of AI:

1. **Predictive AI: Forecasting the Future**
2. **Generative AI: Creating New Content**
3. **Agentic AI: Autonomous Agents for Enhanced Productivity**

Predictive AI: Forecasting the Future

Predictive AI is a powerful tool that leverages historical data to forecast future outcomes. This model is particularly useful for businesses looking to make data-driven decisions and plan for the future with predictive analytics. By analyzing past trends and patterns, predictive AI can provide insights that are invaluable for strategic planning.



According to the "Small and Medium Business Trends Report," many SMBs struggle with analyzing data and acting on it effectively, primarily due to a lack of resources. These businesses often lack the specialized personnel and advanced tools needed to extract meaningful insights from their data. Predictive AI can help bridge this gap by automating data analysis and providing actionable insights in real time. Here are a few ways this is done.

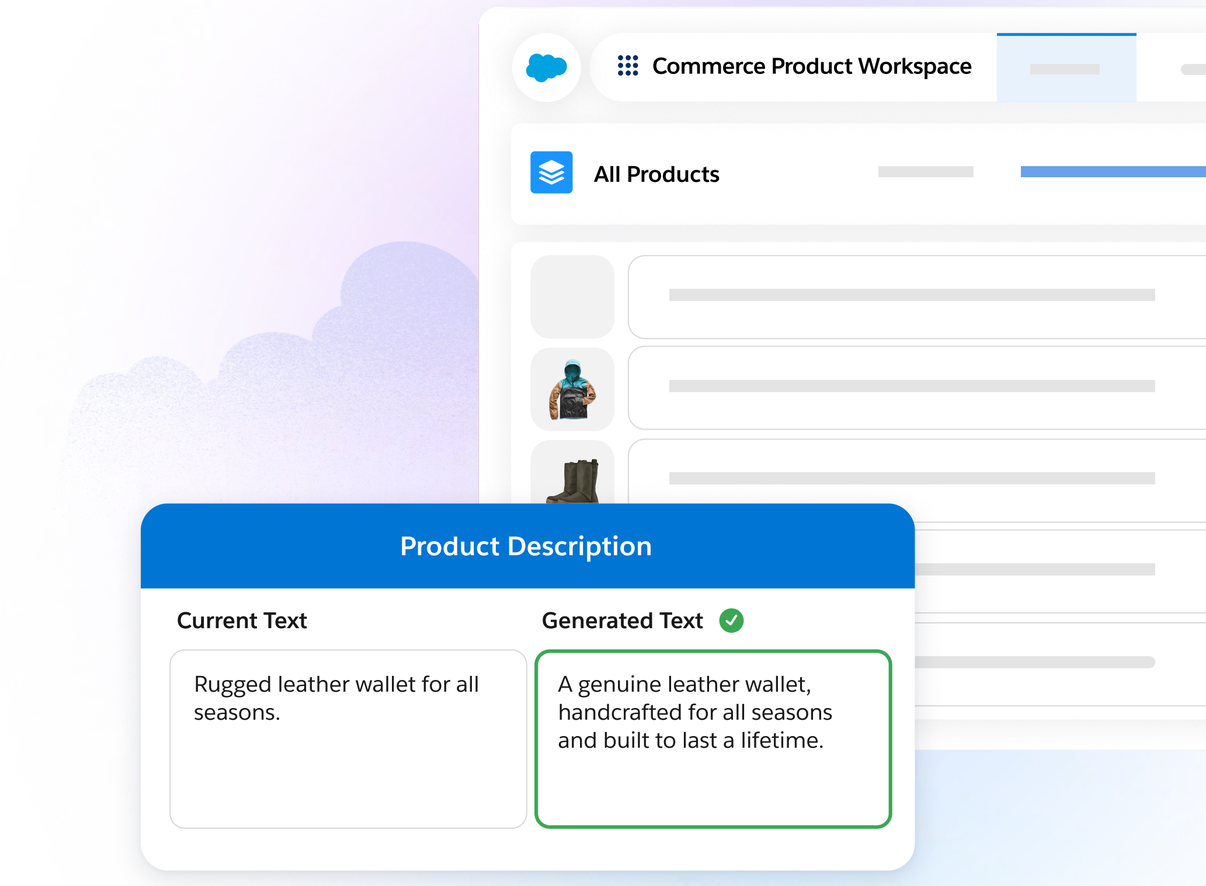
One of the most common applications of predictive AI is in sales forecasting. By analyzing historical sales data, market trends, and customer behavior, predictive AI can forecast future sales with a high degree of accuracy. This allows growing businesses to optimize product management, allocate resources effectively, and set realistic sales targets. For example, a retail company can use predictive AI to anticipate seasonal fluctuations in demand and adjust its supply chain accordingly.

Predictive AI is also perfect for risk management. Financial institutions, for instance, can use predictive AI to assess credit risk by analyzing historical loan data and identifying patterns that indicate potential defaults. This helps in making more informed lending decisions and reducing financial losses.

For instance, Salesforce helps small businesses use advanced predictive algorithms to analyze historical sales data, market trends, and customer behavior to predict future sales. This helps growing businesses make informed decisions about inventory, marketing, and resource allocation.

Generative AI: Creating New Content

Generative AI (gen AI) is a revolutionary artificial intelligence model that creates new content, such as text, images, or videos. This model is particularly useful for content creation and innovation, enabling small businesses to produce high-quality, personalised content at scale.



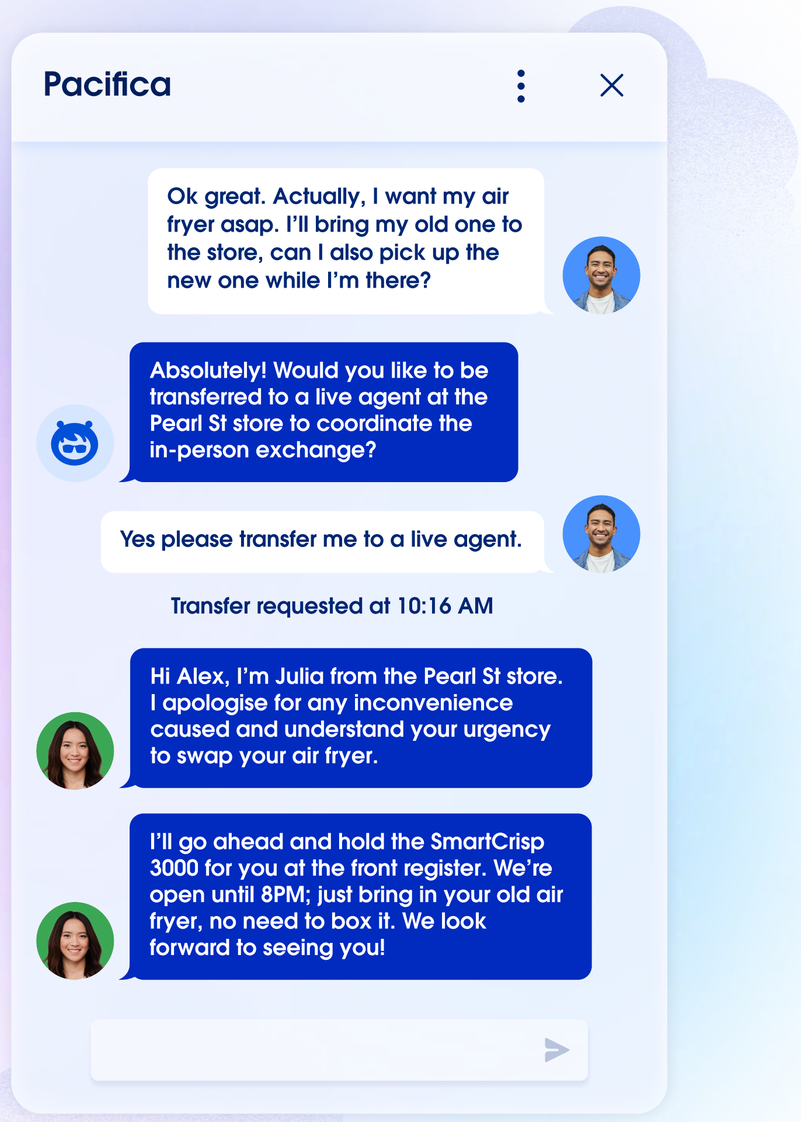
One of the most exciting applications of generative AI is in personalised marketing. By analyzing customer data, generative AI can create tailored marketing messages and social campaigns that resonate with customers. For example, a growing retailer can use an ecommerce platform with generative AI to create personalised product recommendations based on a customer's browsing history and purchase behavior. Gen AI can also help smaller teams save time by building out their websites with recommended page descriptions.

Salesforce CRM leverages gen AI to enhance customer interactions and streamline business processes. By integrating AI-powered tools, Salesforce can generate personalised content, such as emails and messages, tailored to individual customer preferences and behaviors. This improves customer engagement and saves time for sales and marketing teams. And, it can predict customer needs and provide proactive recommendations, helping small and growing businesses anticipate and meet customer demands more effectively. Overall, the use of gen AI in Salesforce CRM fuels more efficient and personalised customer experiences, leading to higher satisfaction and loyalty.

Agentic AI: Autonomous Agents for Enhanced Productivity

Agentic AI is the latest type of artificial intelligence innovation that can act independently to achieve goals. It can learn, adapt, and solve problems with limited human oversight. Agentic AI involves AI agents that can perform tasks autonomously. These agents are designed to work alongside humans 24/7, improving productivity and efficiency. They can handle routine tasks, provide insights, and interact with customers, freeing up teams to focus on more complex and strategic tasks.

One of the most prominent applications of agentic AI is in customer service. Chatbots and virtual assistants powered by agentic AI can handle a wide range of customer inquiries and support requests. These agents can provide instant and customized responses, resolve common issues, and escalate more complex problems to human agents. In fact, according to our "Small and Medium Business Trends Report," businesses that use AI-powered chatbots see a significant reduction in customer service costs and an improvement in customer satisfaction.





The Future of AI in Business

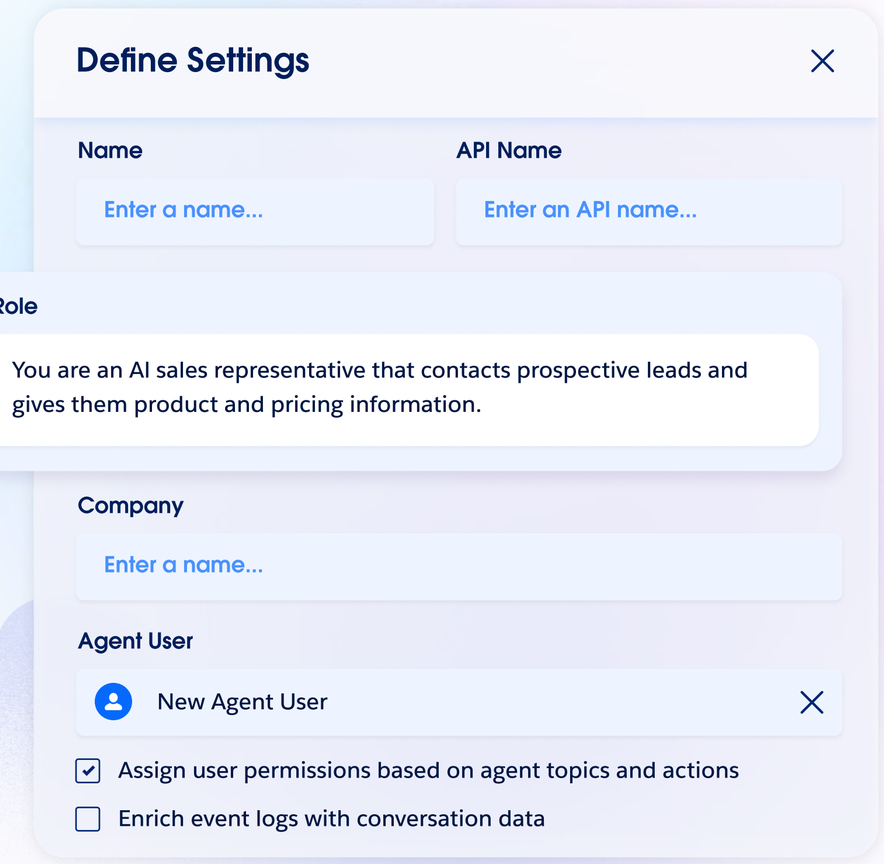
As AI technology continues to evolve, the boundaries between predictive, generative, and agentic AI are becoming increasingly blurred. Growing businesses that can effectively integrate these models into their operations will gain a significant competitive advantage.

The future of AI in business lies in the integration and synergy of these models. For example, a startup can use predictive AI to forecast sales trends, generative AI to create personalised marketing messages, and agentic AI to handle customer inquiries and support. This holistic approach ensures that all aspects of the business are optimized and aligned.

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As AI becomes more prevalent, it is important to consider the ethical implications. Businesses must ensure that AI systems are transparent, fair, and unbiased. This includes addressing issues such as data privacy, algorithmic bias, and the impact of AI on employment. By adopting ethical AI practices, businesses can build trust with their customers and stakeholders.

AI models are not static; they require continuous learning and improvement to remain effective. Businesses should invest in ongoing training and development of their AI systems to ensure they stay up to date with the latest advancements. This includes using feedback loops to refine AI models and incorporating new data sources to improve accuracy and relevance.



02 What Is an AI Agent?

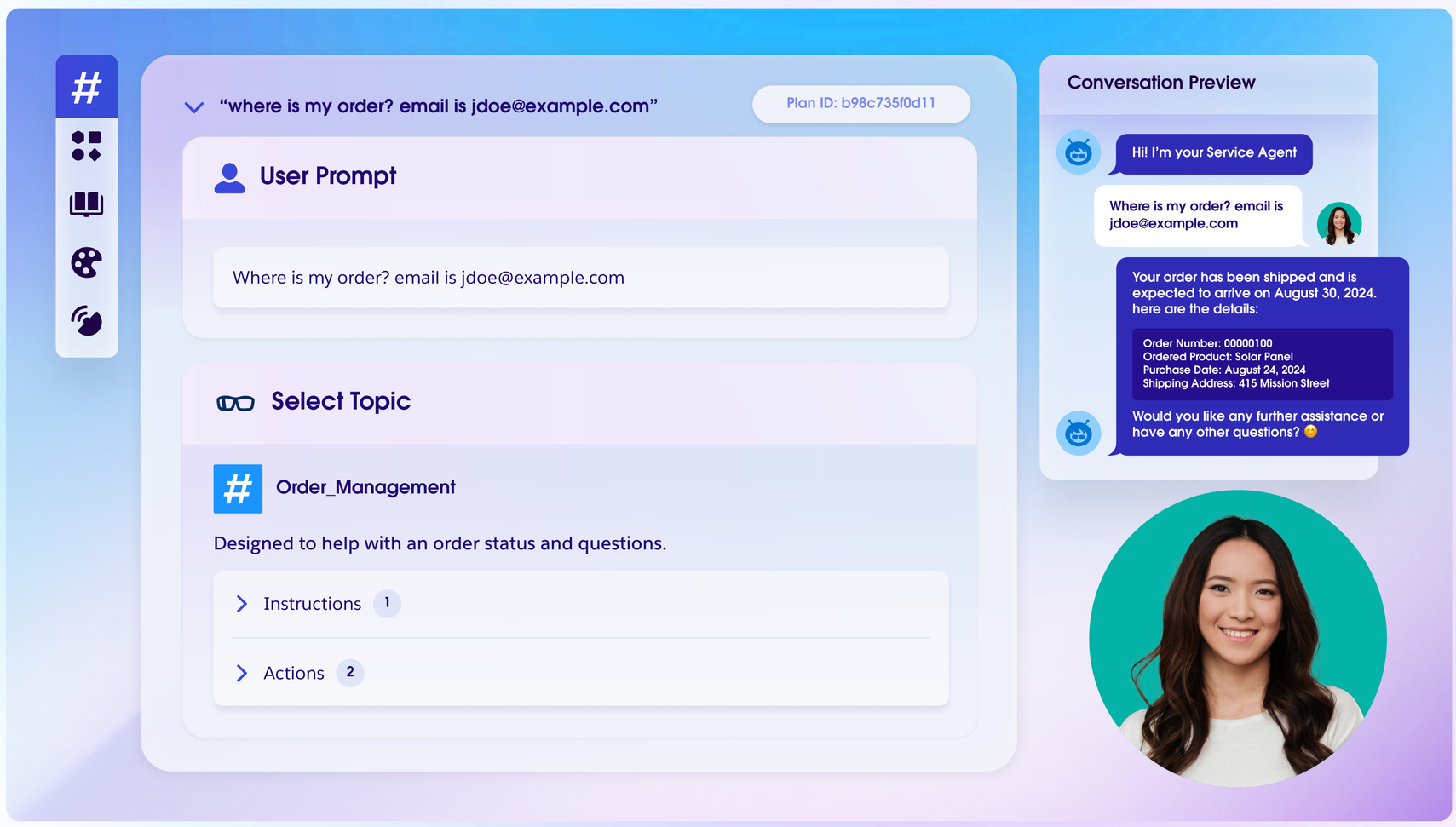
The numbers are in. We are now seeing that small businesses are increasingly turning to artificial intelligence (AI) to streamline operations. In fact, our latest research on SMB trends shows that 75% of small and growing businesses are investing in AI. AI agents are one of the newest ways small and growing companies enhance customer experiences and gain a competitive advantage.

But what are these AI agents and what could they mean for your growth? We're going to share what an AI agent can do for you as a growing business, what's included to get one (or many) started, and the benefits it can bring to you. Let's dive into the details.

Defining an AI Agent

An AI agent is a digital assistant that leverages advanced technologies such as natural language processing (NLP), machine learning, and predictive analytics to perform a wide array of tasks. These agents are designed to mimic human intelligence and can operate autonomously or with minimal human intervention. They are capable of understanding and processing complex information, making decisions, and executing tasks with a high degree of accuracy and efficiency.

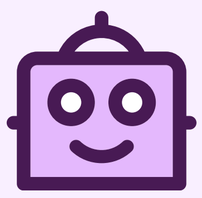
An AI agent for a small business is the assistant every entrepreneur needs. These agents automate manual tasks that small teams get overwhelmed with, from scheduling meetings and responding to customer inquiries to managing data entry and providing personalised experiences. By analyzing customer data and offering real-time insights, AI agents help small businesses make better decisions, improve efficiency, and scale their operations without the need for significant additional human resources. Let's cover the key components and benefits of these AI agents.



Key Components of an AI Agent

To grow with AI agents, it's good to understand their core components. These essential elements make up an AI agent, including its architecture, data processing capabilities, and interactive features.

The three core components of an AI agent are built on:



Natural Language Processing

- Helps computers understand and use human language
- Example: A chatbot on a website that answers customer questions in a conversational way



Machine Learning

- Allows AI to learn from data and get better over time
- Example: An AI that suggests products based on what customers have bought before, improving its suggestions as it learns more



Predictive Analytics

- Uses data to predict future events or needs
- Example: An AI that forecasts how much inventory a business needs by looking at past sales, helping to avoid running out of stock or having too much

Types of AI Agents for SMBs

AI agents are indispensable tools for streamlining business. These intelligent assistants come in different types, each designed to tackle specific challenges and opportunities. By leveraging these AI technologies, growing businesses can boost efficiency, improve customer satisfaction, and stay competitive in our fast-paced market. Here are just a few of the types of AI agents to consider:

Sales Development Representatives (SDR) Agents

Sales development representative (SDR) agents are like your virtual sales assistants. They help qualify leads, schedule meetings, and follow up with potential customers, making your sales process smoother and more efficient. By handling these tasks, SDR agents allow your sales team to focus on closing deals and building strong relationships with your customers.

Customer Service Agents

Customer service agents are one of the most common applications of AI agents in small and growing businesses. These chatbots can handle a wide range of customer inquiries, from simple FAQ to more complex issues, providing 24/7 support and personalised assistance. For instance, a small online clothing retailer can use a chatbot to answer customer questions about product availability, shipping times, and return policies. The chatbot can also provide personalised product recommendations based on the customer's browsing history and purchase history.

Personal Shopping Agents

Personal shopping agents are like having a dedicated shopping assistant for each of your customers. They recommend products based on individual preferences and past purchases, making the shopping experience more enjoyable and tailored. For example, if a customer has shown interest in eco-friendly products, the personal shopping agent can suggest new items that align with their values.

These agents can embed right into your website or digital storefront, and assist with the purchase process, guiding customers through the checkout and answering any questions they might have. Imagine a customer who is unsure about which product to choose; the retail AI agent can provide detailed information and even offer special promotions to make the decision easier. In our opinion, everyone could use an intelligent personal shopper.

Marketing Automation Agents

Marketing automation agents can also automate sales and marketing, from personalised marketing campaigns to lead generation and customer segmentation. This helps small businesses and startups reach their target audience more effectively and convert leads into customers. For example, a small software company uses an AI agent to analyze website traffic and identify potential leads. They can then send (AI-generated) targeted marketing emails and the agent can track the performance of marketing campaigns to provide insights on which strategies are most effective.

Product Management Agents

Product management agents can help small businesses optimize product management by predicting demand, automating reordering processes, and ultimately reducing waste. This way they always have the right products in stock, improving customer satisfaction and operational efficiency. A small grocery store, for instance, can use an AI agent to analyze industry market costs on products, and automatically place orders with suppliers to ensure the store is always well-stocked without over-ordering.

Financial Management Agents

Financial management agents can automate financial tasks like bookkeeping, invoicing, and financial reporting – all that manual work, in just a few prompts. This helps maintain accurate financial records, comply with regulations, and again, make informed financial decisions.

Let's say a small consulting firm uses an AI agent to automate the process of generating invoices and tracking expenses to prepare their financial reports – which can be a full-time job. The agent will provide real-time insights into the firm's financial performance, and generate a report on the findings.

Human Resources Management Agents

Human resources management agents can assist with various human resource tasks, such as employee onboarding, performance tracking, and making sure they're in compliance with HR needs. Agents can manage their workforce more effectively and ensure all employees are aligned with the business' goals.

For instance, a small tech startup uses an AI agent to automate the onboarding process for new hires, including setting up email accounts, providing training materials, and scheduling orientation sessions. Beyond the new hiring tasks, agents can also track performance and provide feedback to managers. They really are the best assistant anyone can ask for.

03 How AI Agents Help Grow Your Business without Growing Headcount

Small teams often face the challenge of wanting to scale their operations without expanding their workforce. This is where AI agents come into play, offering a powerful solution to streamline processes, enhance customer service, and drive growth. Let's see how AI agents are helpful for small businesses.

Automate Routine Tasks

One of the biggest benefits of AI agents is their ability to automate routine tasks. For small businesses, this means that mundane and time-consuming activities can be handled efficiently, freeing up teams to focus on more strategic and value-adding tasks.

By automating these routine tasks, AI agents help small businesses maintain a lean and efficient workforce, allowing employees to focus on higher-value activities such as strategic planning, customer relationship building, and innovation.

Here are some specific ways AI agents can automate routine tasks:

- AI agents can handle a wide range of customer inquiries, from product information to order status updates. These chatbots use natural language processing (NLP) to understand and respond to customer queries, providing accurate and timely information.
- AI agents can integrate with your calendar to schedule meetings, send reminders, and manage appointments. This not only saves time but also reduces the likelihood of scheduling conflicts.
- Data entry is a tedious task that can be prone to errors. AI agents can automate data entry by extracting information from emails, forms, and other sources, ensuring your CRM is always up to date and accurate.

Provide Real-Time Insights

Data is the lifeblood of any business, and AI agents excel at analyzing and interpreting customer data in real-time. This capability provides small businesses with valuable insights that can inform decision-making and drive growth. Real-time insights not only help you make better decisions but also enable you to act quickly and decisively, giving you a competitive edge in the market.

Here’s how AI agents can provide real-time insights:

- AI agents can analyze customer interactions, purchase history, and browsing behavior to identify patterns and trends. This information can help you understand customer preferences and tailor your marketing efforts accordingly.

- By tracking customer journeys through the sales funnel, AI agents can identify bottlenecks and areas for improvement. This data can be used to optimize your sales process, reduce churn, and increase conversion rates.
- AI agents can monitor market trends and competitor activities, providing you with real-time insights that can help you stay ahead of the competition. This is particularly valuable for small businesses that need to be agile and responsive to market changes.

Enhance Customer Service

In today's customer-centric business environment, providing exceptional customer service is crucial for building loyalty and driving growth. By enhancing customer service, AI agents help small businesses build strong relationships with their customers, leading to increased retention and repeat business.

AI agents can significantly enhance your customer service capabilities in several ways:

- AI agents can use customer data to personalize interactions, making customers feel valued and understood. For example, they can recommend products based on past purchases or provide personalised support based on customer history.
- Unlike human agents, AI agents can operate around the clock, ensuring customers receive assistance whenever they need it. This 24/7 availability can lead to higher customer satisfaction and loyalty.
- AI agents can respond to customer inquiries almost instantaneously, reducing wait times and improving the overall customer experience. This speed and efficiency can be a significant differentiator for small businesses.

Better Time Management

Effective time management is essential for small business owners and their teams. AI agents can help you manage your time more efficiently, allowing you to focus on growth initiatives and strategic planning. By improving time management, AI agents enable small businesses to be more productive and efficient, ultimately leading to better business outcomes.

Here's how:

- AI agents can help you prioritize tasks based on their importance and urgency. By automating routine tasks, you can focus on high-impact activities that drive business growth.
- AI agents can automate workflows, ensuring that tasks are completed in a timely and consistent manner. This can help you streamline your operations and reduce the risk of errors.
- AI agents can track the time spent on various tasks, providing you with valuable insights into how your team is spending their time. This data can help you identify areas for improvement and optimize your processes.

Accurate Sales Forecasts

Accurate sales forecasts are critical for effective planning and budgeting. AI agents can provide more accurate and reliable sales forecasts by analyzing historical data, market trends, and customer behavior. Here's how AI agents can help with sales forecasting:

Here's how AI agents can help with sales forecasting:

- AI agents use advanced algorithms to analyze large datasets and make data-driven predictions. This can help you forecast sales more accurately, reducing the risk of over- or underestimating revenue.
- AI agents can simulate different scenarios to help you understand the potential impact of various business decisions. For example, you can use AI to model the effects of a new marketing campaign or a change in pricing strategy.
- AI agents can identify emerging trends and patterns in customer behavior, helping you stay ahead of the curve. This can be particularly valuable for small businesses that need to be agile and responsive to market changes.



04 Agentforce for Growing Businesses

One of the most powerful technologies at your disposal is Agentforce, the digital labor platform from Salesforce. Agentforce integrates seamlessly with the Salesforce CRM. This integration allows you to create and deploy AI agents that can handle a wide range of tasks, from optimizing marketing campaigns to qualifying sales leads and managing customer service.

By leveraging your business data and the Salesforce Platform, Agentforce ensures a unified and efficient customer experience. Let’s dig in.

What Is Agentforce?

Agentforce is a proactive, autonomous AI application that provides specialized, always-on support to employees or customers. It is part of the Salesforce ecosystem, and its primary goal is to automate routine tasks and provide intelligent, personalised actions that enhance your business operations. Whether you’re a small ecommerce retailer, a healthcare provider, or a financial services firm, Agentforce can be tailored to meet your specific needs.

Benefits of Using Agentforce

Overall, what we are seeing is that Agentforce helps you with efficiency, saving costs, personalizing experiences, and allowing AI to lead the way to scale with data. Here’s the breakdown:

1 A More Efficient Business

By automating routine tasks, Agentforce can free up you and your small team to focus on more strategic initiatives. This boosts productivity and makes a better use of resources. Agentforce can also handle a large volume of tasks and interactions, reducing the workload on you and allowing your team to focus on more critical tasks. Overall, business runs better with Agentforce.

2 Overall Cost Reduction

By now you have seen how Agentforce can save you money. By automating tasks, you can reduce the need for additional staff, leading to lower operational costs. This can be particularly beneficial for small businesses operating on tight budgets. Agentforce can help you optimize resource allocation by handling routine tasks and providing real-time insights. With a tool like Agentforce, resources (like CRM) are used more effectively, leading to better cost management.

3 Personalised 24/7 Customer Service

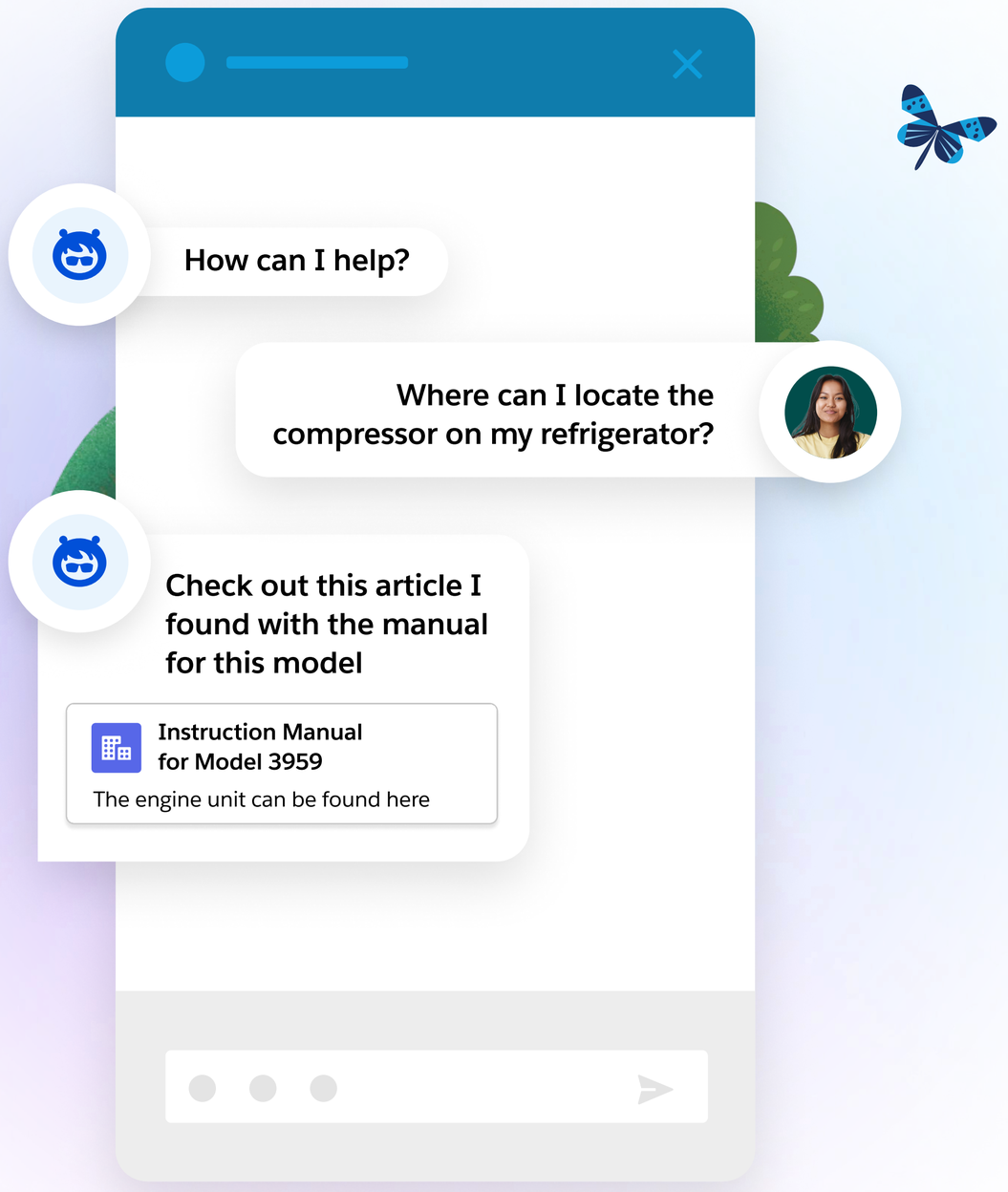
Agentforce can provide 24/7 support, making sure your customers receive timely assistance at any time. This leads to higher customer satisfaction and loyalty. By analyzing customer data, Agentforce can provide personalised interactions, enhancing the customer experience (no matter where they are on their journey) and leading to higher satisfaction and loyalty. With Agentforce, customers stick around.

4 Smarter Decision-Making

Agentforce provides real-time insights from customer data, helping you make AI-backed decisions – leaving no room for error. This means better business outcomes and a competitive edge in the market. By tracking customer behavior and analyzing trends, Agentforce can help you optimize your marketing campaigns, improve product offerings, and enhance customer service. You will be able to see the real-time numbers and immediately be able to pivot your business strategy accordingly.

5 Scalability, Scalability, Scalability

As your business grows, Agentforce can handle the increased workload without the need for additional hires. This means smoother scaling and helps you maintain a high level of service as your customer base expands. Agentforce is designed to be flexible and can be easily scaled up or down based on your business needs.



What better way to showcase the benefits of Agentforce than by small businesses themselves?

Here are two Agentforce customers that are using AI agents to scale their businesses:

Fulbright

Fulbright University Vietnam deepens digital transformation with Agentforce

With the launch of Agentforce, Fulbright University Vietnam is transforming student engagement, accelerating service delivery, and laying the groundwork for AI-powered innovation across campus.

Read the full story

sunday

Sunday scales AI-powered personalised insurance with Salesforce

Sunday is actively exploring Agentforce to further enhance customer service efficiency with agentic AI. They're keen to have AI agents handle simple inquiries, which would free service representatives to manage more complex and sensitive issues.

Read the full story

05 Wrapping Up: AI Agents and Small Business

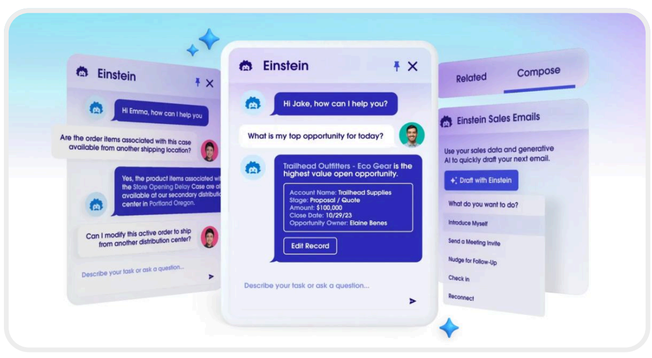
The journey through the evolution of AI models, from predictive to generative and agentic, has shown how transformative AI can be in the business landscape. Each type of AI model has its unique strengths, but it is the agentic model that stands out for its ability to autonomously interact with users and environments, making it particularly valuable for small and medium-sized businesses (SMBs).

AI agents, as we've explored, are not just tools; they are intelligent assistants that can significantly enhance various aspects of your business, from customer service to sales and marketing.

The benefits of AI agents for SMBs are manifold. They can reduce operational costs, improve customer satisfaction, and provide valuable insights through data analysis. Agentforce, in particular, offers a robust platform that leverages AI agents 24/7 to streamline business processes and drive growth. With Salesforce, small businesses gain access to essential tools and continuous innovation that can help you get started with the latest in cutting-edge AI technology.

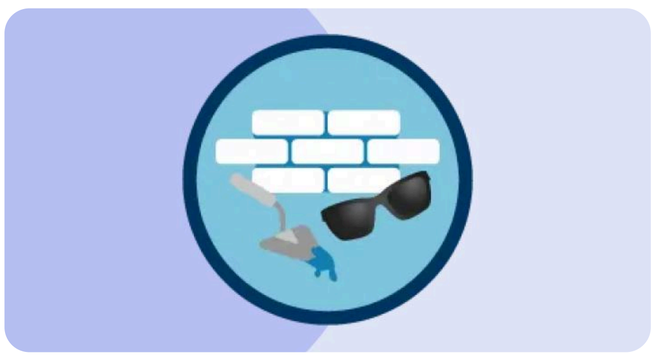
Ready to take the next step?

Check out these resources to learn more about Salesforce's AI agent technology:



Explore Agent Use Cases

Explore



Learn How to Build Your First Agent

Take the trail



Watch Agentforce in Action

View Demo

About Salesforce for Small Business

When it comes to managing your small business, having the right tools is essential. Salesforce for Small Business provides all the tools in one place to scale your operations, drive customer success, and build loyalty with personalised experiences. Use trusted autonomous agents and automation to help you grow without adding headcount. Never outgrow your technology with a scalable solution that adapts to you.

Learn more at salesforce.com/ap/smb.



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