

5 Steps to Implementing AI Agents for Small Businesses.



Learn how to get your AI agents up and running.



 **Select Topic**

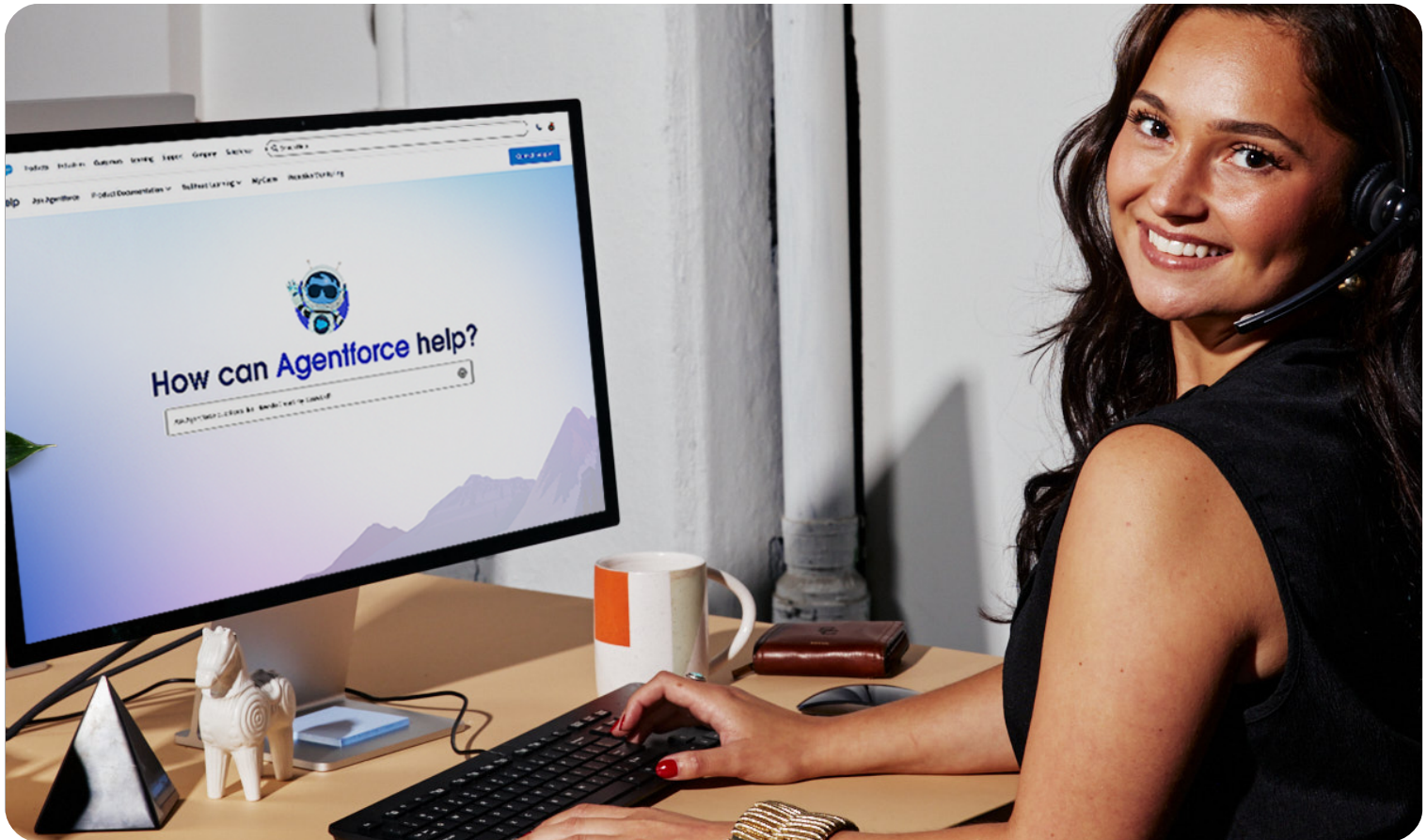
 **Order_Management**

Designed to help with an order status and questions.

> Instructions **1**

> Actions **2**

Introduction



Ready to implement your very own AI agent? Join the hundreds of other [small and medium businesses \(SMBs\)](#) just like yours who are already turning to [artificial intelligence \(AI\)](#) to simplify their workday. And while the journey to implementing an AI agent can seem overwhelming, it's been done before, many times.

With tools like [Salesforce's Agentforce](#) on the market, growing businesses now have unprecedented access to AI agents for building all new operational workflows and to grow — fast. This e-book will guide you through the types of AI agents available to integrate into your [customer relationship management \(CRM\)](#) tool, and how you can begin developing your own AI agents with Agentforce to help your small business grow big — fast.

Table of Contents

03

Step 1: Determine an AI Strategy For Your Business

06

Step 2: Choose the Perfect AI Solution

07

Step 3: Build And Deploy Your AI Agents

12

Step 4: Review Best Practices for Agentforce Implementation

15

Step 5: Get Started: Build Your Own AI Agent with Salesforce

16

Agentforce Use Case Workshop

Step 1: Determine an AI Strategy For Your Business

To make the right choice for your business, you should outline what your approach to AI will be. Here are some important considerations to flesh out with your team before choosing an AI solution:



Did You Know?



41% of time is lost to low value and repetitive tasks.

Source: ["New trends in AI use at work," Workforce Lab at Slack \(2024\)](#)

Define Your Objectives and Business Priorities

Begin by clearly outlining what specific goals and challenges you aim to address with AI. This first step involves a deep dive into your business processes, identifying bottlenecks, areas for improvement, and opportunities for automation. What tasks can you take off your plate that you've been doing over and over, and over? Let an agent tackle those for you.

Consider quantifiable metrics such as reducing operational costs, improving [customer satisfaction scores \(CSAT\)](#), increasing sales conversion rates, or streamlining internal workflows. A well-defined set of objectives will serve as your guiding light throughout the entire implementation process, ensuring that your chosen AI solution directly contributes to your strategic business outcomes.

Create Your Strategic Vision Statement



Try this worksheet to create a powerful Agentic AI Vision Statement for your journey. Ask your team to participate, and you might be surprised by the results.

[Download now](#)

Get Stakeholders on Board

If you aren't the final say in implementing AI agents, gaining strong leadership buy-in is the next logical step for your business. This initial support sets the tone for the entire implementation process, so here are a few steps to get started:

- 01 Identify key stakeholders:** Understand their individual concerns and priorities.
- 02 Communicate potential benefits:** Highlight how AI agents can solve specific business pain points and boost efficiency.
- 03 Develop an implementation plan:** Outline resources, challenges, and a realistic timeline.
- 04 Demonstrate capabilities:** Use pilot programs or case studies to build confidence and gather feedback.
- 05 Establish clear communication:** Provide ongoing updates, training, and address concerns during adoption.

Build An Alignment Plan

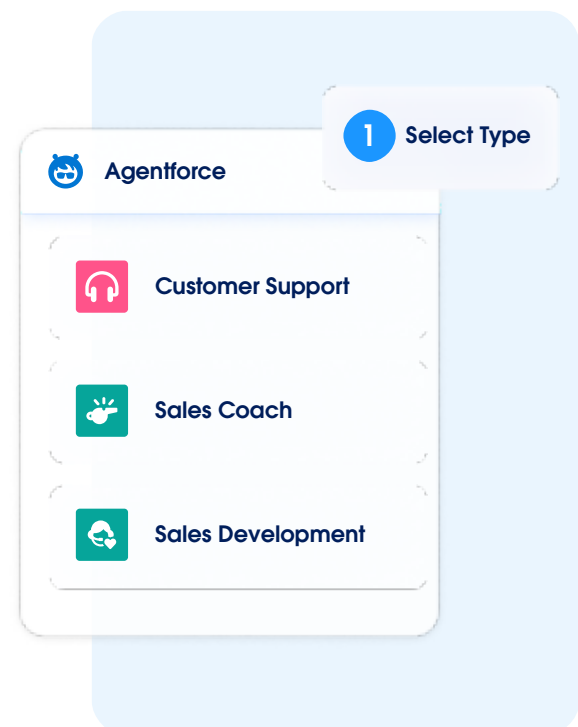
- ✓ **Genuine alignment comes from involving people in the process. Use this worksheet to prepare your team for agentic AI.**

[Download now](#)

Research Potential Solutions

Once your objectives are clear and you have stakeholder buy-in for your AI investment, do your own research of various AI solutions available in the market. This phase requires a look into different AI technologies, their capabilities, and their track records with businesses similar to yours.

Pay close attention to case studies, [customer testimonials](#), and industry recognition to gauge the effectiveness and reliability of each potential solution. Don't limit your search to well-known vendors; research emerging solutions that might offer different approaches to your needs.



Evaluate Compatibility

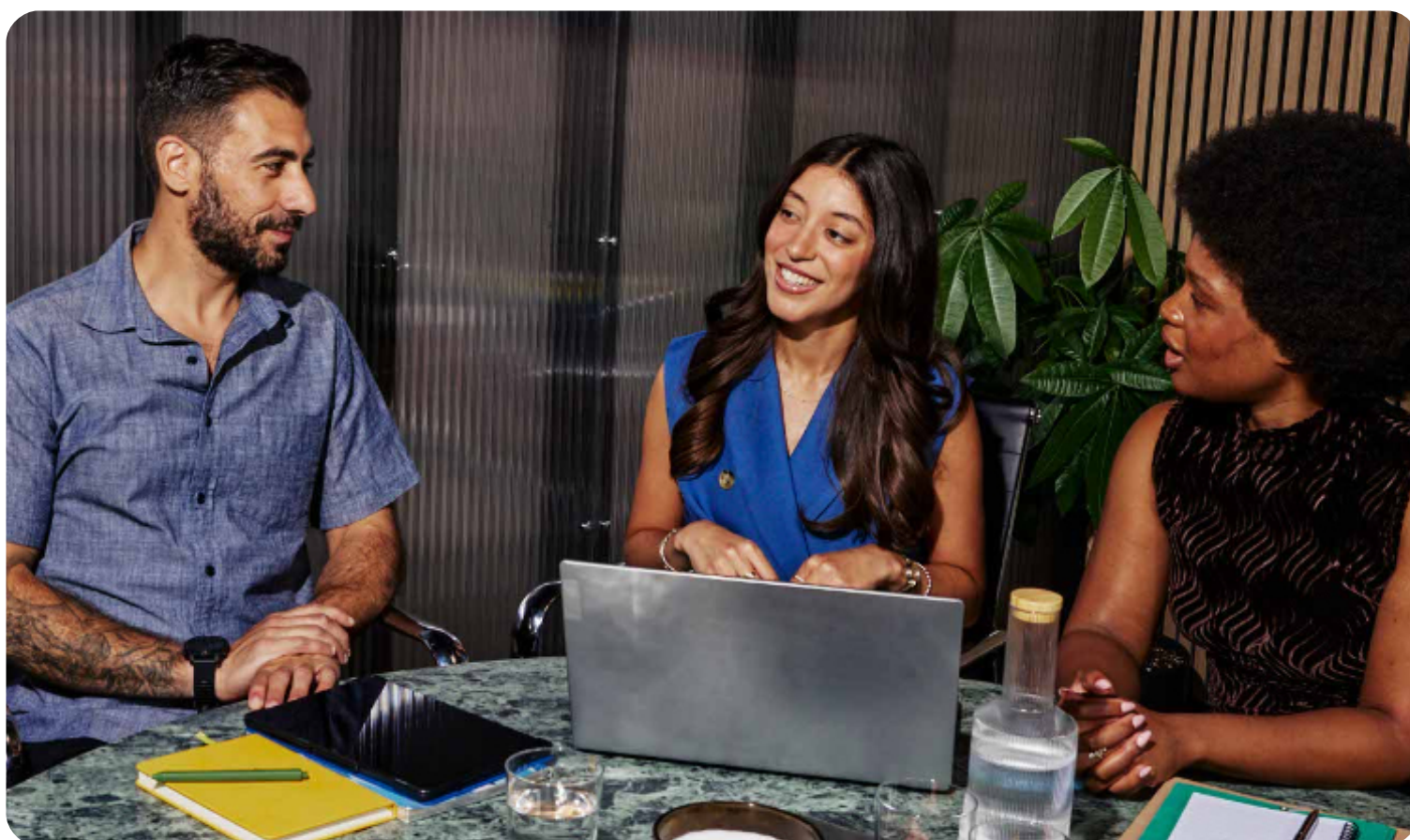
After compiling a list of potential AI solutions, assess how well each option aligns with your existing business needs, your infrastructure, and operational systems. This goes beyond just technical specifications; consider how these tools will work with your current suite or team, scalability, data security protocols, and compliance with relevant [industry regulations](#).

A successful AI partnership hinges on seamless integration with your current workflows, minimizing disruption and maximizing efficiency. Consider factors like the learning curve for your team, the level of technical support offered by the vendor, and the overall long-term viability of the partnership. It's important to ensure that the AI solution can grow and adapt with your business as your needs evolve.

Team Buy-In

Beyond leadership endorsement, securing team buy-in is equally vital for successful AI agent implementation in any type of business. Involving your team early in the process allows you to deeply understand their daily challenges, pain points, and specific needs.

This collaborative approach ensures that the AI solutions are tailored to genuinely assist the team, addressing their biggest needs rather than imposing a top-down solution. When everyone feels heard and has seen how AI can directly improve their workflows and alleviate burdens, it builds a sense of ownership and excitement, significantly easing the onboarding process.



Step 2: Choose the Perfect AI Solution

Some SMBs believe that just adopting a [Large Language Model \(LLM\)](#) will solve all their operational challenges. The truth is that an LLM alone isn't sufficient: AI needs to be integrated with a powerful CRM platform to guarantee accuracy, security, and the capability to move your business forward. While LLMs provide the intelligence, a CRM like Salesforce provides the foundational data, the secure environment, and the operational framework necessary for AI to truly deliver on its promise and move your business forward in a meaningful and secure way.

Before selecting an AI solution, you must first understand what you need the AI to accomplish. Are you looking to automate routine tasks, analyze complex datasets, or enhance the [customer experience](#)? Different tasks require different capabilities.

When evaluating potential AI solutions, consider the following factors:

- 01 Capabilities:** Some AI tools are designed for specific tasks, such as natural language processing or image recognition. Ensure the AI you're considering is suited for your intended application.
- 02 Customization:** Depending on your needs, you may require an AI that can be customized or fine-tuned for your specific use case. Some AI solutions offer more flexibility than others
- 03 Integration:** Consider how well the AI integrates with your existing systems and infrastructure. Seamless integration can save time and reduce costs.
- 04 Scalability:** Choose an AI partner that can scale with your needs. As your project grows, your AI solution should be able to handle increased demands.
- 05 Security:** Ensure that your AI partner adheres to relevant security standards and compliance regulations, especially if you're handling sensitive data.

Meet Agentforce

[Agentforce](#) is the agentic layer of the Salesforce Platform that lets users either build and deploy agents or select from a variety of templates. These agents provide specialized, always-on support to employees or customers, automate routine tasks, and carry out intelligent, personalized actions that enhance your business operations. Whether you're a small ecommerce retailer, a healthcare provider, or a boutique financial services firm, Agentforce can be tailored to meet your specific needs – without the high cost or need for a team of AI experts.

At its core, Agentforce is the solution for small businesses looking to use the power of AI. It offers an easy to use platform with prebuilt templates, easy integration, and powerful security. With Agentforce, you can integrate disconnected systems that allow you to automate tasks, improve customer experiences, and grow your business.

Step 3: Build And Deploy Your AI Agents

Choosing the right type and role of AI agent for your small business is the first step in implementation

To make an informed decision about the best type of AI agent for your small business, evaluate your customer base to understand their needs and preferences. Here are a few questions to get you started, kickstarting your core list of business needs for an AI agent:

- 01 What would your customers benefit from that you can't do 24/7?
- 02 What needs do they have that could eat up your time?
- 03 What things can you automate to save you resources?

Next, consider the cost-effectiveness of each [agent role](#) in relation to your budget. Broadly speaking, there are five different AI agent roles to choose from. Here's a cost-benefit analysis for each type:

AI Agent Type	Description	Costs	Benefits
 Sales Development Rep (SDR)	Automate outreach and qualification of leads.	Initial setup and CRM integration, training, data management, subscription fees for AI platforms.	24/7 availability, faster response times, reduced support costs, improved customer satisfaction.
 Customer Service (Chatbots)	Provide instant support and resolve common customer queries.	Development and integration with support systems, ongoing training, ongoing maintenance.	Higher conversion rates, personalized customer experiences, optimized ad spend, improved campaign ROI.
 Marketing Campaign	Optimize campaign performance and personalize customer interactions.	Integration with marketing automation, data collection and analysis, setup and training, ongoing monitoring.	Personalized product recommendations, improved customer engagement, increased sales, streamlined checkout processes.
 Ecommerce (Shopping Assistant)	Enhance the online shopping experience and simplify sales processes.	Integration with ecommerce platforms and databases, product information, and sales training, initial development and customization.	Automate outreach and qualification of leads.
 Collaboration	Facilitate team communication and project management.	Integration with project management tools, configuration for workflows, team training, information retrieval, data privacy, and security.	Improved team productivity, streamlined workflows, better knowledge sharing, reduced communication overhead.

Finally, plan for scalability and adaptability as your business grows by taking into account your goals and needs. Thorough planning for these phases is important as your business evolves. This means anticipating future growth and understanding your current and future goals. As you expand, your AI agents must handle more data, complex tasks, and users – without sacrificing performance.



Customer Story

Delivering Bespoke Service at Scale: The Boat Bike Tours Story

Boat Bike Tours’ manual processes made it difficult for them to deliver the concierge service they’re known for. Now, Agentforce delivers instant quotes and answers for fast, 24/7 service at scale. [See how they did it.](#)

Ready to choose your agent? The two main types of AI agents are [autonomous and assistive](#). Each type has its own set of benefits and is suited to different business needs.

Autonomous Agents

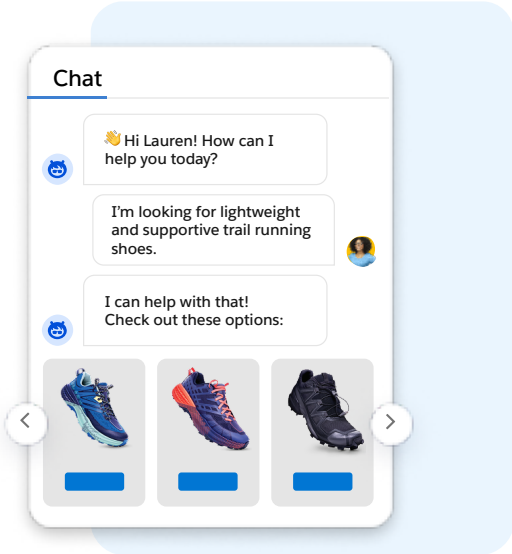
Autonomous agents are designed to perform tasks independently, learning and adapting to achieve specific goals without constant human intervention.

- 01 Best for:** high volume of simple inquiries, cost-effectiveness, and 24/7 availability.
- 02 Key features:** handles routine tasks, provides instant responses, and operates without human intervention.
- 03 Use cases:** answering frequently-asked questions, processing simple orders, and managing basic customer service tasks.

Assistive Agents

Assistive agents enhance human capabilities by automating repetitive tasks, providing real-time information, and offering intelligent support, allowing small businesses to improve workflows and boost productivity.

- 01 Best for:** Fewer but more complex issues, personalized customer interactions, and human oversight
- 02 Key features:** Enhance human capabilities, provide context-aware support, and handle sensitive or complex tasks.
- 03 Use cases:** Qualifying leads, providing tailored product recommendations, and coaching sales reps.



Define and Tailor Your Ideal Agent

When designing an AI agent for your small business, consider these critical factors for effectiveness, safety, and integration:

Aspect	Defenition	Examples
 Task Definition	Clearly define the agent's exact tasks.	Define the agent's specific functions, such as automating customer service or internal data analysis.
 Channels	Identify where the agent will interact (website, social media, email).	For internal use, consider email or project management tool integrations.
 Data Access	Specify the necessary datasets for the agent.	Restrict access to sensitive employee information or financial records.
 Guardrails	Set clear ethical boundaries for the agent to follow.	Ensure the agent's tone is always professional and helpful, consistent with your brand guidelines.



Worksheet: Ready to apply this to your own business? Try the Agent Planning Worksheet (p. 16-17).

Human Involvement: The Key to AI Success

Human involvement is still the most important factor for successful AI implementation – AI augments human capabilities; it doesn’t replace them. Here are five parameters to discuss with your team when determining the scope of human involvement with your AI agents.

Strategic Decisions

Most important of all, leadership must maintain control over important strategic choices related to AI implementation. This includes deciding the scope of AI agent integration, setting performance metrics, and ensuring that AI initiatives align with the overall business vision and long-term goals.

Escalation

Define clear parameters for when an AI agent should defer to a human. This ensures that complex or sensitive issues are handled by humans with the appropriate expertise and empathy, preventing customer frustration and maintaining service quality.

Supervision

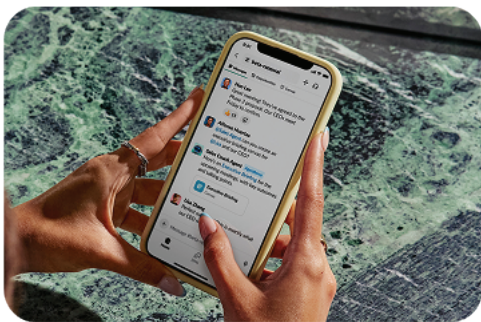
Your team should actively monitor the performance of AI agents and provide regular feedback to stakeholders. This ongoing oversight is important for identifying areas where the agent can improve, ensuring accuracy, and maintaining alignment with business objectives and brand voice.

Exception Handling

Establish protocols for humans to address unexpected situations that AI agents aren't programmed to handle. This can include unusual customer requests, technical glitches, or scenarios that require nuanced judgment.

Training

Your AI solution should be responsible for training and refining AI agents – but you'll soon learn how to as well. This involves training the agent on relevant data, correcting errors, and updating its knowledge base to ensure it remains effective, accurate, and up-to-date with evolving business needs.



Did You Know?



25% of customers expect AI to match human capabilities in five to 10 years from now.

Source: ["State of the AI Connected Customer" \(2024\)](#)

Test, Refine, and Go Live

Once an AI agent is deployed, it's important to monitor its performance and make adjustments as needed. Conduct thorough testing to identify and fix any issues, and refine the AI agent's performance based on feedback.

As you evolve, so does your agent. Here are a few things to monitor:

- 01 Track Key Metrics:** Regularly monitor performance metrics such as response time, accuracy, and customer satisfaction.
- 02 Collect User Feedback:** Gather feedback from customers and employees to identify areas for improvement.
- 03 Analyze Data:** Outline resources, challenges, and a realistic timeline.
- 04 Update Training Data:** Continuously update the AI agent's training data to reflect new information and changing customer needs.
- 05 Implement Enhancements:** Make necessary adjustments and enhancements based on feedback and performance data.
- 06 Conduct Regular Audits:** Perform regular audits to ensure the AI agent is compliant with data privacy and security standards.



Pro tip: Stay AI-informed. Keep up-to-date with the latest AI advancements and best practices to ensure your agent remains effective. Business moves fast, but AI moves faster.

Set Your AI Agent Up for Safe, Seamless Growth

The next step is to effectively set up and integrate it with your existing team and workflows. This ensures that your team is ready to embrace the new AI capabilities. A successful implementation hinges on a smooth transition, clear guidelines, and continuous support for your human workforce.

Team Integration

Consider how your teams will work with the agent, assessing current team structures and identifying how the AI agent can complement their efforts, rather than replace them.

Process Changes

Plan for changes in processes and workflows. Implementing an AI agent will likely alter existing operational procedures. Map out these changes in advance, identifying areas where the agent's capabilities and outputs need to be adjusted.

Policy Alignment

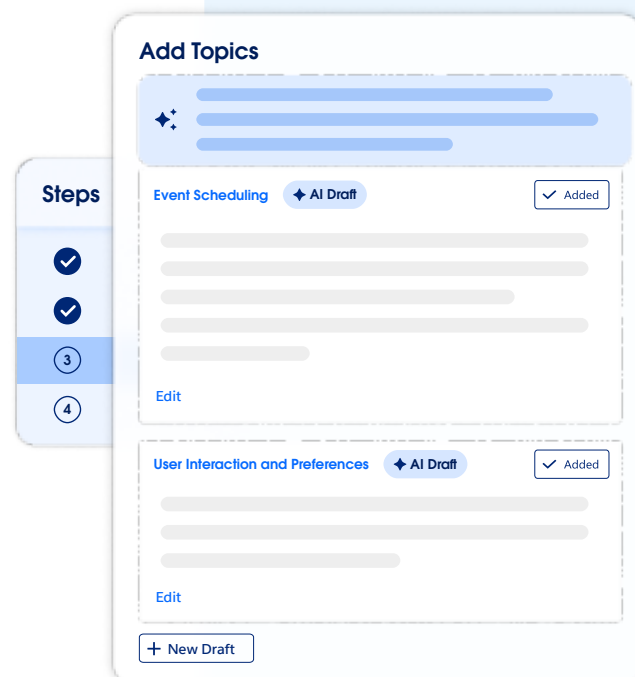
Ensure the agent's actions align with your business policies. The AI agent must operate within the ethical, legal, and operational boundaries set by your organization. This requires a thorough review of existing company policies and, if necessary, the development of new guidelines to govern the AI agent's behavior.

Training and Support

Provide the necessary training and support for your team. To ensure successful adoption and effective use of the AI agent, your team members will require comprehensive training on its functionalities, limitations, and how to interact with it. Ongoing support should also be in place to address any issues or questions that arise.

Regular Reviews

Regularly review and update guardrails to ensure safe and ethical operation. Periodic reviews allow for adjustments to its operational parameters and policies, ensuring the agent remains effective, compliant, and aligned with evolving business needs and ethical standards.

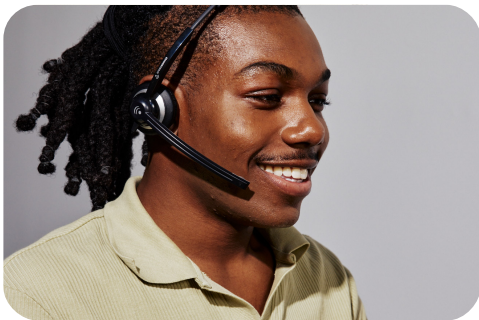


Step 4: Review Best Practices for Agentforce Implementation

It's important to have some rules to guide you through your Agentforce implementation process, from initial planning to ongoing optimization. These practices are designed to boost efficiency, minimize disruptions, and ultimately help your small business use the full potential of AI agents.

Maintain High Data Quality and Security

The effectiveness of any AI agent is directly proportional to the quality of the data it processes. Therefore, maintaining high data quality is a top priority. Implement continuous data governance policies, including [data validation](#), cleansing, and deduplication processes, to ensure accuracy, consistency, and completeness.



Did You Know?



85% of SMB IT professionals say AI's outputs are only as good as its data inputs.

Source: [Salesforce SMB Trends Report, Sixth Edition, 2024](#)

Salesforce's [Data Cloud](#) is built right into the platform and brings together all your data sources to fuel Agentforce. It does this by unifying all your Salesforce data as well as data from any third-party system or data lake, in any structure, and in any format (even emails and PDFs). This seamless connectivity eliminates data silos, allowing different systems to communicate effortlessly and share critical data points.

Bad data quality can lead to flawed insights and poor decisions from your AI agents. Equally important is data security. Salesforce houses sensitive business and customer information, necessitating strong encryption, access controls, and compliance with relevant [data privacy regulations](#) (like [GDPR](#) or [CCPA](#)). Implementing multi-factor authentication, regular security audits, and data loss prevention strategies are essential to protect against breaches and maintain customer trust.

Implementing AI agents in your small business requires a strong focus on risk management and ethical behavior to ensure successful and responsible initiatives. Business guardrails benefit everyone—here's how:

- 01 Your employees:** Guardrails address job displacement concerns by reskilling and upskilling, ensure adequate training, guard against bias and discrimination in AI outputs, and consider the psychological impact on employee wellbeing.
- 02 Your business:** They also protect against reputational damage from malfunctioning or unethical AI; prevent financial loss due to AI errors, develop contingency plans for operational disruption from AI failures, and avoid competitive disadvantage by ensuring effective AI implementation.
- 03 Your technology:** Guardrails implement strong cybersecurity measures for AI systems, plan for continuous monitoring and updates to address system malfunctions, ensure seamless integration with existing systems, and design for scalability and performance.
- 04 Your data:** And, they protect privacy and confidentiality, ensure high data quality and integrity, establish clear data governance policies, and define data ownership and usage rights.

[Ethical behavior](#) is equally important for building trust with your customers, your teams, and your stakeholders. By proactively addressing these risk management and ethical considerations, small businesses can use AI's power while building a responsible, sustainable, and trusted future.

Here are a few pro tips:

- Strive for transparency and explainability in AI decisions.
- Incorporate privacy by design from the outset and consider the broader positive societal impact.
- Clearly define accountability when AI makes errors and maintain appropriate human oversight for bigger decisions.

Compliance: Navigating the Rulebook

Beyond your internal data practices, you have to follow industry standards and regulations. The rules for data and AI are always changing, with new laws popping up to deal with privacy, ethical AI, and data protection. Think HIPAA for healthcare or PCI DSS for payment cards.

Staying compliant means being proactive. You should:

- Periodically review your data handling and AI against the latest compliance rules.
- Build privacy into all your AI systems and data processes from the get-go.
- Document everything about your data processing, how you get consent, and your compliance efforts.
- Make sure your employees know the [best practices for data privacy](#) and what their compliance duties are.
- Consider hiring a [Data Protection Officer \(DPO\)](#) to provide counsel and establish best practices for teams sensitive data.

Build in Feedback to Improve Your Agents

User feedback is absolutely critical for constantly improving your AI agents. Don't think of launching an agent as the end; it's actually the start of a continual process of making it better. Regularly collecting and truly acting on user feedback is key to boosting your AI's performance, accuracy, and overall helpfulness.

This feedback can come from lots of places: direct surveys, analyzing user sentiment, observations from your internal teams, and performance data. Analyzing this information helps you spot where the agent might not be doing so well, misunderstanding requests, or not meeting user expectations.

Making changes based on this feedback – whether it's tweaking algorithms, smoothing out conversations, or adding more to the agent's knowledge – ensures your agent grows in a way that truly helps its users and your business. This constant cycle of feedback and improvement is vital for getting the most out of your AI investment and making sure it works well long-term.

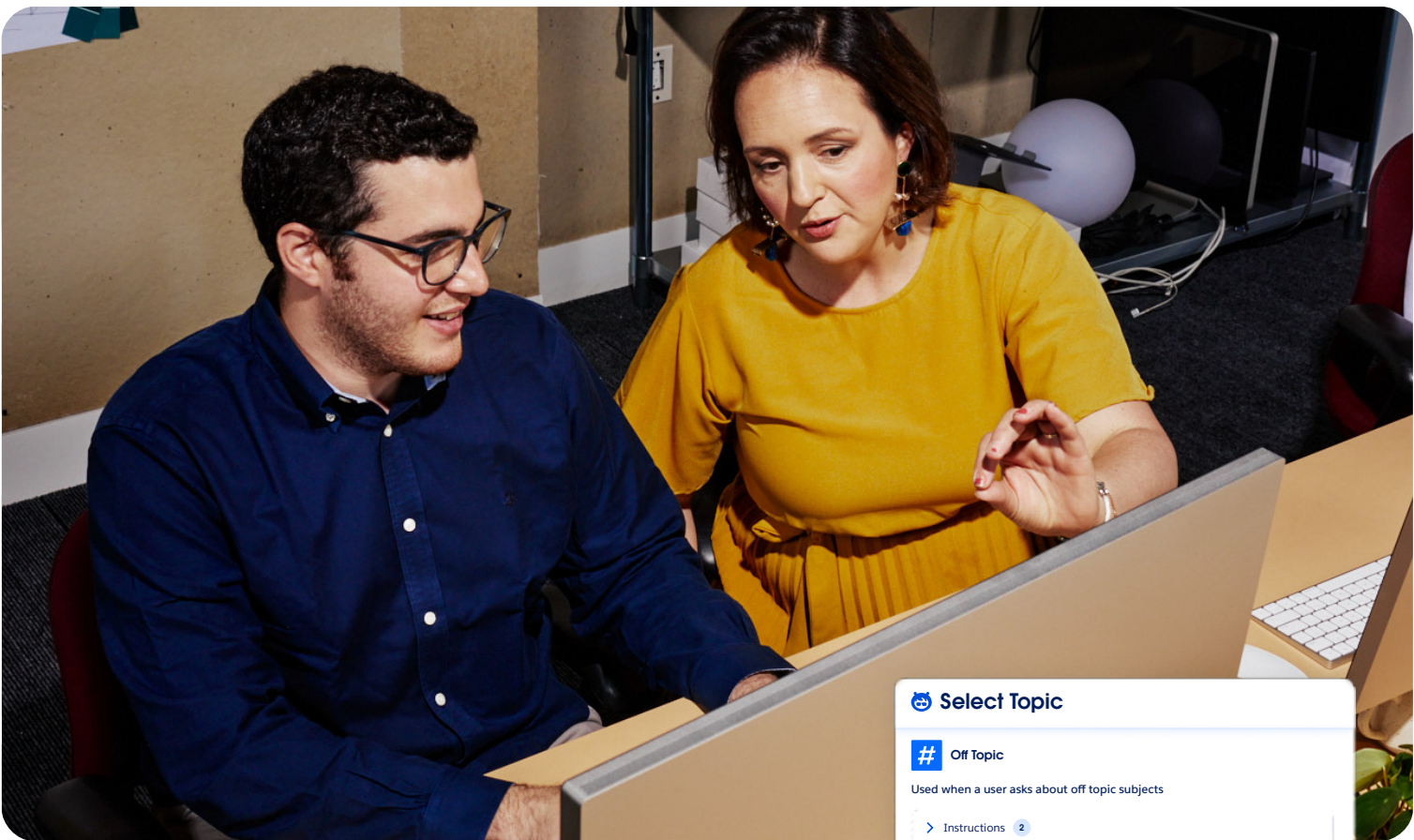


Did You Know?



71% of customers believe it's important for a human to validate the output of AI.

Source: ["State of the AI Connected Customer" \(2024\)](#)



Select Topic

Off Topic

Used when a user asks about off topic subjects

> Instructions 2

1. The user request is off topic. NEVER answer general knowledge questions. Only respond to general greetings and questions about your capabilities.

2. Do not acknowledge the user's question and redirect the conversation by asking how you can help with questions related to the pre-defined topics.

▼ Actions 0

Step 5: Get Started on Building Your Own AI Agent with Salesforce

For startups and SMBs looking to apply the power of artificial intelligence, building an AI agent can seem like a daunting task. However, with the right tools, like Salesforce’s Agentforce, and a structured approach, it's more accessible than ever.

By following the steps outlined in this e-book, you can build a strong Agentforce strategy that aligns with your business goals and values. Start with a clear plan, define your ideal agent, lay the foundation for success, configure your agent for peak performance, and ensure safe and seamless growth. With Agentforce, your small business can thrive in the AI age.

Here are resources to get you started:



Get Ready for Agentforce.

[Take the trail](#)



Watch Agentforce in Action.

[View demo](#)



Reach out to an Agentforce expert.

[Contact us](#)



Agentforce

Agent Planning Worksheet



How to Use This Worksheet

Start with the example below to see the framework in action. Then, move to the blank worksheet to define your own ideal agent step by step.

01 Define the Use Case

When (moment)	A customer visits help.salesforce.com
I Want (action)	Help them easily find what they need - product support & AE info and availability
So That (goal)	They have a smooth customer service experience

02 Plan the Agent

Actions What can they do?	• Provide answers and surface links to appropriate articles • Allow option to schedule time with AE • Escalate to support rep
Data What can they reference?	• Salesforce product information • Customer Account Executive information • Calendar information
Channels How can they be engaged?	This agent is accessible when individuals go to help.salesforce.com via a front and center chat prompt
Instructions What should & shouldn't it do?	• Use a casual, friendly tone • Do not guess • Always provide a link when giving information
Metrics How will you measure success?	• Increase case resolution rate by 15% • Decrease human agent escalations by 10%

Agentforce

Agent Planning Worksheet

Your Turn
Put together a plan to implement AI agents. Fill in each section and map out your own ideal agent. Find out how you can set your team up for AI success.

01 Define the Use Case

When (moment)	
I Want (action)	
So That (goal)	

02 Plan the Agent

Actions What can they do?	
Data What can they reference?	
Channels How can they be engaged?	
Instructions What should & shouldn't it do?	
Metrics How will you measure success?	

