



Practical AI for Small Businesses

Explore use cases across marketing, sales, and service to see how companies are getting more value from AI.

The image features a central collage of AI-powered Salesforce features. At the top left, a woman's face is shown in a circular frame. Below her is a chat interface with a heart icon and the text "Number #00001528". In the center, a flowchart shows a sequence of steps: a play button, a right arrow, and an envelope icon. To the right, a man's face is shown in a circular frame. Below him is a bar chart with four bars of increasing height. At the bottom right, a "Draft an Email with Einstein" dialog box is open, showing a text input field with "Make it shorter and less formal." and a "Draft Email" button. In the bottom left corner, a cartoon character of Albert Einstein is standing. The background is a light blue gradient with decorative elements like plus signs and dots.

Einstein Summary
The customer had a question about the product they recently purchased.
Copy Save

AI Journey Automation

Draft an Email with Einstein
Make it shorter and less formal.
Start with a prompt template

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Introduction

In a recent [CEO survey by Inc. and Salesforce](#), 91% of CEOs are optimistic about how artificial intelligence (AI) will help their business. So it makes sense that [almost half of small businesses](#) will try different AI tools over the next year. And one area where AI is making a big impact is in customer relationship management (CRM).

In this guide, we'll talk about AI features found in the more sophisticated CRMs and show you how they can help your team run operations smoothly, handle routine tasks quicker, and manage leads better. We'll also share real-world use cases and results from small businesses already using AI to do more with less.



Top 3 AI Use Cases for Marketing

AI is a powerful tool that provides the customer insights you need to market more effectively and create personalized content that resonates with your audience. It's now easier than ever to discover new leads and connect with existing customers.

We'll begin by exploring AI-driven marketing tools that help you identify and engage prospects.

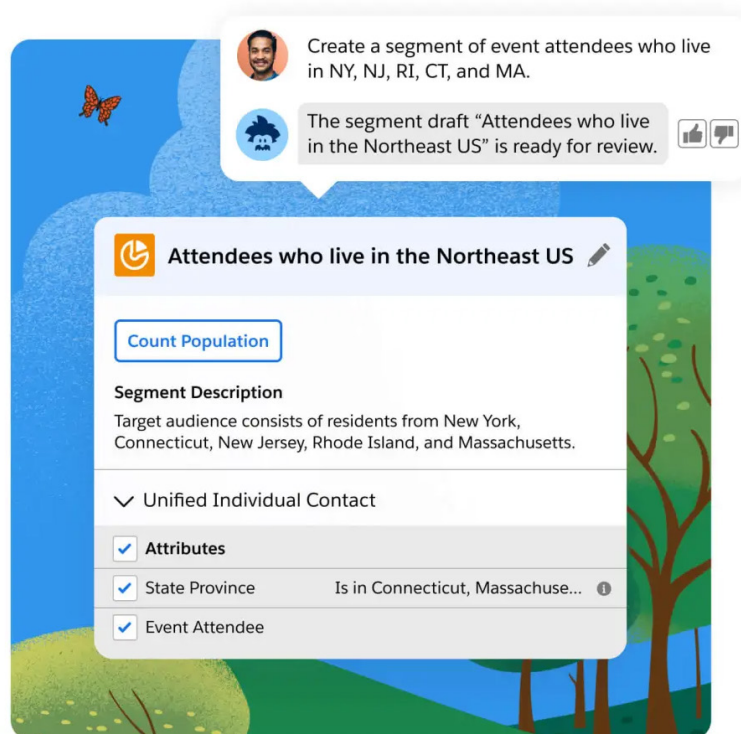


Find and reach your target audiences more efficiently

With a CRM that offers marketing functionality, you can use generative AI to segment audiences and launch campaigns to target those audiences effectively.

Suppose you're a marketing manager looking to reach out to new customers or prospects. With a marketing platform powered by generative AI, all you need to do is describe who you want to target in everyday conversational language, and AI can automatically generate an audience segment based on your customer data.

From there, you can tweak your description or the suggested attributes to further refine your intended target. Once that's finalized, you can easily launch that segment into your native workflow or to an external activation platform.

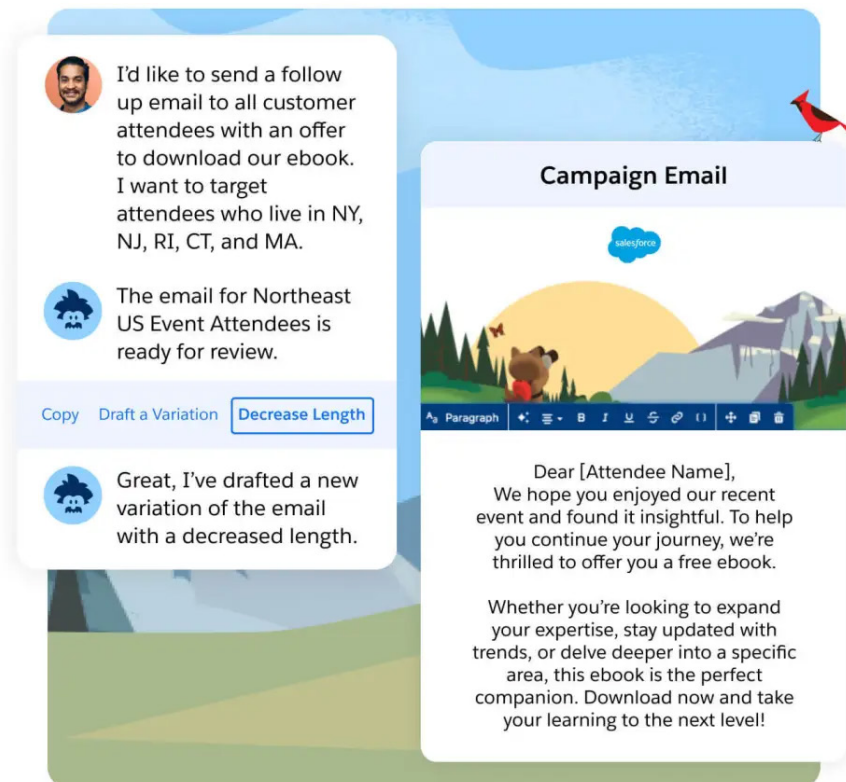


Generate personalized content faster

So now you know who you're talking to. But what do you want to say? AI can help with that, too. It can generate targeted copy for forms, landing pages, and emails – all right from your marketing automation platform.

The benefit of generative AI will become glaringly obvious as your team spends just a few minutes revising pre-populated copy instead of hours writing it themselves from scratch.

Plus, as you continue to interact with your audience, AI will gather more response data to reference. And that data will enhance its ability to optimize recommendations and improve engagement and conversion KPIs.



The image shows a user interface for generating and editing email content. On the left, a chat-style interface shows a user's request and the AI's response. The user asks for a follow-up email for Northeast US event attendees. The AI responds that the draft is ready for review and offers a 'Decrease Length' button. On the right, a 'Campaign Email' editor shows a preview of the email with a Salesforce logo and a scenic background. Below the preview is a rich text editor with a toolbar and the final draft of the email copy.

I'd like to send a follow up email to all customer attendees with an offer to download our ebook. I want to target attendees who live in NY, NJ, RI, CT, and MA.

The email for Northeast US Event Attendees is ready for review.

Copy Draft a Variation **Decrease Length**

Great, I've drafted a new variation of the email with a decreased length.

Campaign Email

salesforce

Paragraph

Dear [Attendee Name],
We hope you enjoyed our recent event and found it insightful. To help you continue your journey, we're thrilled to offer you a free ebook.

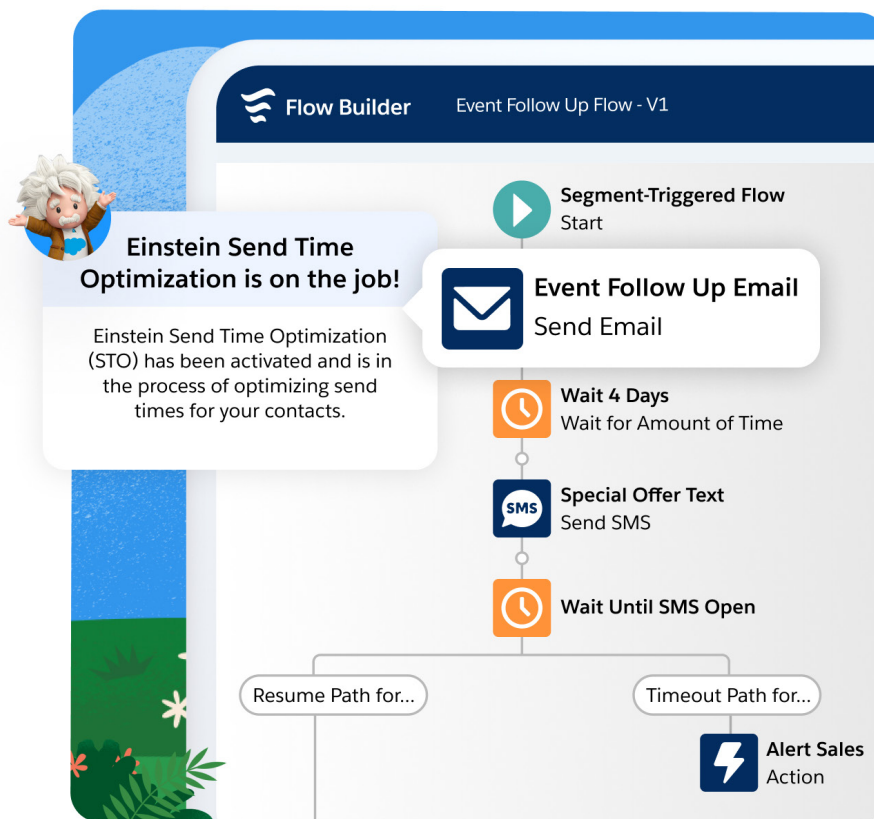
Whether you're looking to expand your expertise, stay updated with trends, or delve deeper into a specific area, this ebook is the perfect companion. Download now and take your learning to the next level!

Reach audiences at the right time

You know who you're talking to. You know what you want to say. The only question now is when to say it. AI can also be a huge help here.

For example, when you're sending an email, AI can use engagement history data to predict when each customer is most likely to click. This helps you beat out the competition and appear at the top of your customer's inbox when they're more likely to give you their attention.

Long story short: Less guesswork, more clicks.





Marketing AI in Action: Grammarly

Grammarly increases plan upgrades by 80% with sales and marketing AI.

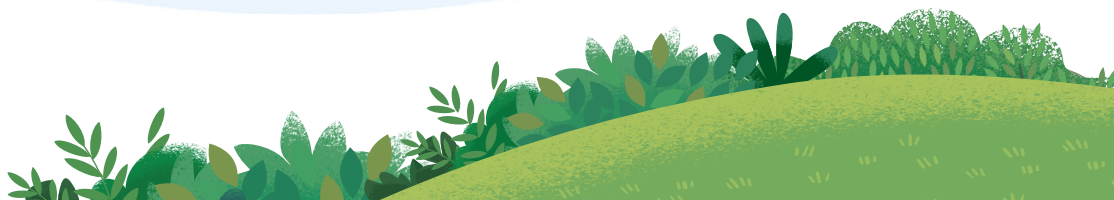
Grammarly is an AI-powered writing tool trusted by over 30 million people and 70,000 teams, including 96% of employees at Fortune 500 companies. Its goal is to help customers improve their writing while maintaining security and privacy.

Grammarly's marketing team used to spend hours making email lists, but many leads, including spam bots and unqualified accounts, were dead ends. The sales team needed better leads so they could use their time more effectively. Salesforce had the solutions. To address their challenge and improve lead quality, Grammarly turned to Salesforce Marketing Cloud. Marketing Cloud uses AI and customer data to help you connect with audiences on a personal level across every marketing touchpoint.

Specifically, Grammarly relied on a Salesforce marketing automation tool called Marketing Cloud Account Engagement. This strategy led to better leads, 30% more conversions, 80% more upgrades, and faster deal closings in just 30 days.

Grammarly also used Einstein Send Time Optimization functionality to automatically build email lists and predict the best times to email prospects. Now the unsubscribe rate is just 0.04% compared to a 2% industry average.

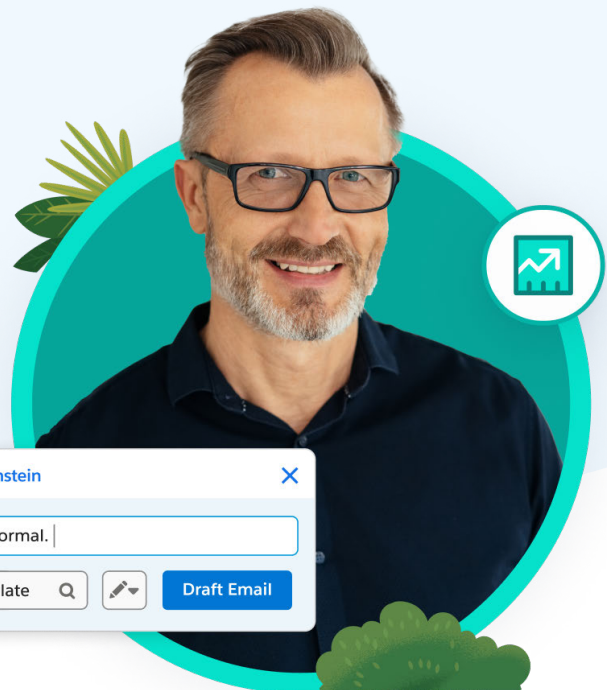
[Read the full story here >](#)




Top 3 AI Use Cases for Sales

AI can also be a game-changer for your sales team. Sales reps spend [70% of their time](#) on non-selling tasks, like sorting through leads and crafting personalized emails.

Fortunately, AI tools can automate these tasks, helping your whole sales team work smarter and faster. Recent statistics show that [83% of sales teams with AI](#) saw revenue growth this year, versus 66% without AI. Let's dive into the tools that make it happen.



 Draft an Email with Einstein ✕

Make it shorter and less formal. |

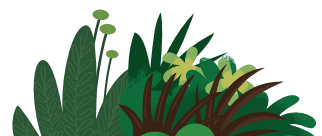
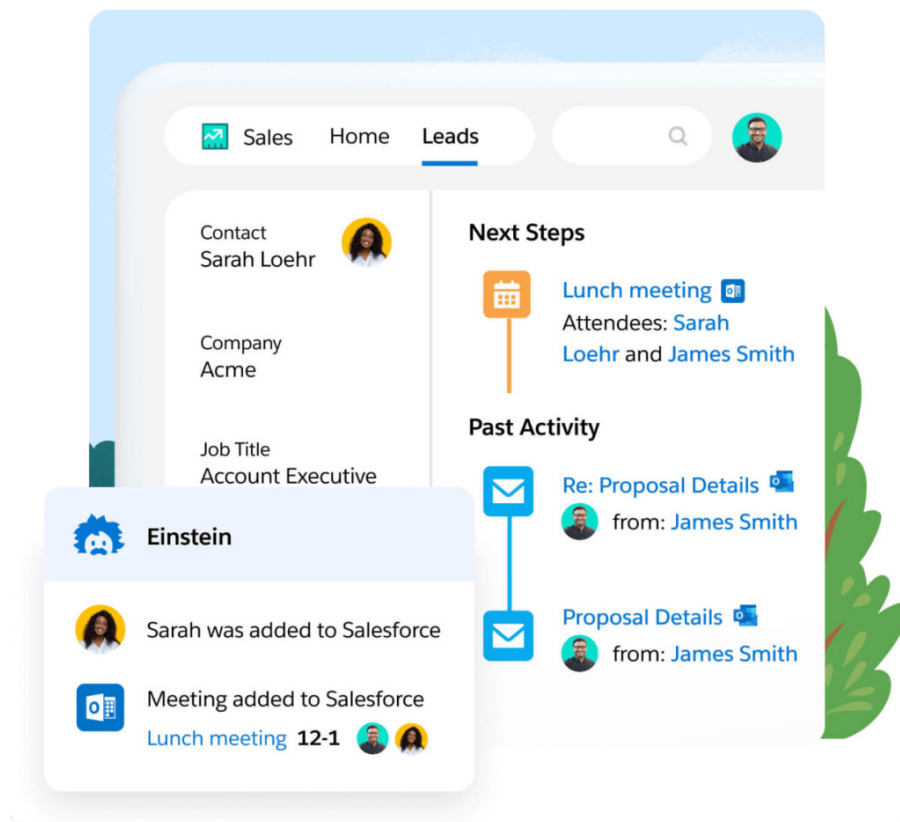
Start with a prompt template

Eliminate data entry and streamline CRM updates

If you're a sales rep, you know that data entry is a necessary but repetitive task. With AI, you can eliminate manual data entry by automatically capturing sales activities and updating your CRM. This gives you the insights you need to close deals faster and the time to focus on building strong customer relationships.

As you go through the sales process, AI captures any relevant data from customer interactions, including calls, emails, and messages. For example, when you reach out to a lead using email, AI automatically creates a new deal record in your CRM and updates the record with the corresponding email summaries.

When the deal progresses, AI is there at every step, moving the deal to the next stage, adding call transcripts, and creating notes. This saves your whole team time and ensures that nothing slips through the cracks in the sales process. It also organizes and primes the data in a way that maximizes the AI's ability to analyze behavior, flag deal risks, and identify next steps.

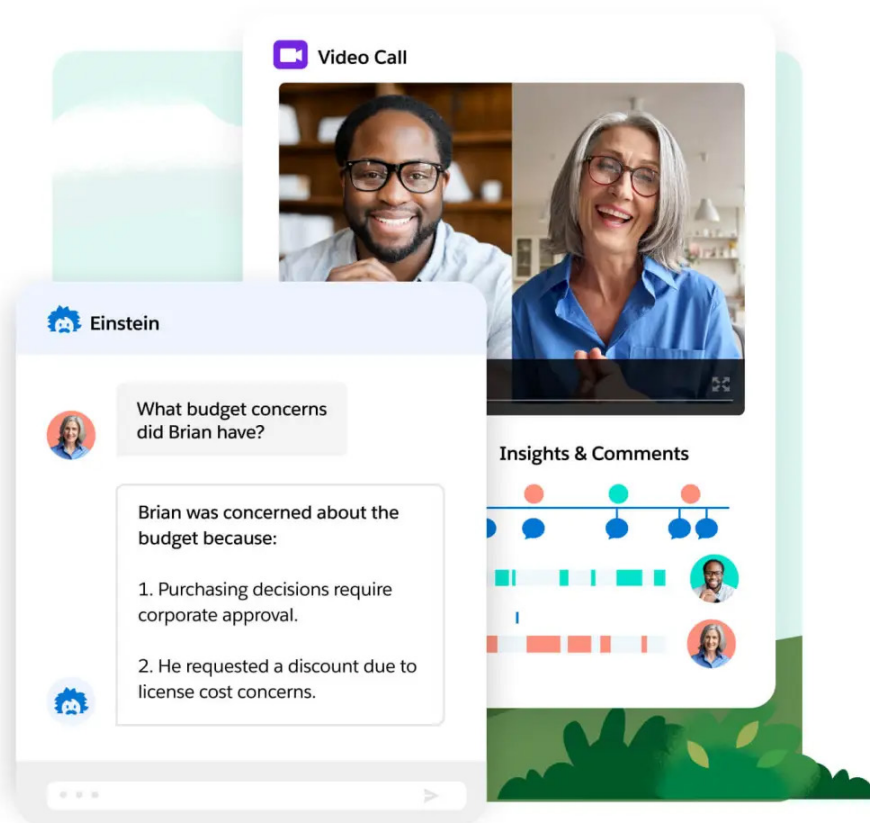


Get call support with automated note-taking

Every time you're on a sales call, you need to capture critical information right then and there. But those details are hard to document manually in the moment and can easily be lost in the shuffle. Even if it's recorded, listening back to the entire phone call takes time you just don't have.

This is where AI can do the heavy lifting. During a sales call, you can use AI to take detailed notes, so you can focus on the customer. Afterward, the AI transcribes the sales call into structured summaries, flags key moments such as pricing objections, and identifies the best actions to take next.

Now let's say you follow up after the call, but the customer takes a while to respond. When they finally resurface, there's no need to recall the conversation from memory. In seconds, the AI provides all the relevant details you need to call the customer, with a personalized sales pitch ready to go.



Automate tasks with a sales assistant in the flow of work

Putting all the necessary data at your team's fingertips is just the beginning. Using your customer data, AI can also act as your own personal assistant – or as we call it, your copilot.

Copilots are the next level of AI innovation, where you simply tell AI what to do for you, right in the flow of work. It helps sellers work faster, gain better insights into your deals, access information quickly, and accelerate deal cycles.

So instead of navigating to an AI tool that's disconnected from your CRM, you can just open up your copilot and ask it to do things like:

- Create a personalized close plan
- Generate emails
- Assist with meeting prep and follow-up
- Automate note-taking
- Find insights about opportunities in the pipeline
- Provide forecast guidance

All that means that you and your team can spend more time building relationships with customers and less time sifting through data and screens.

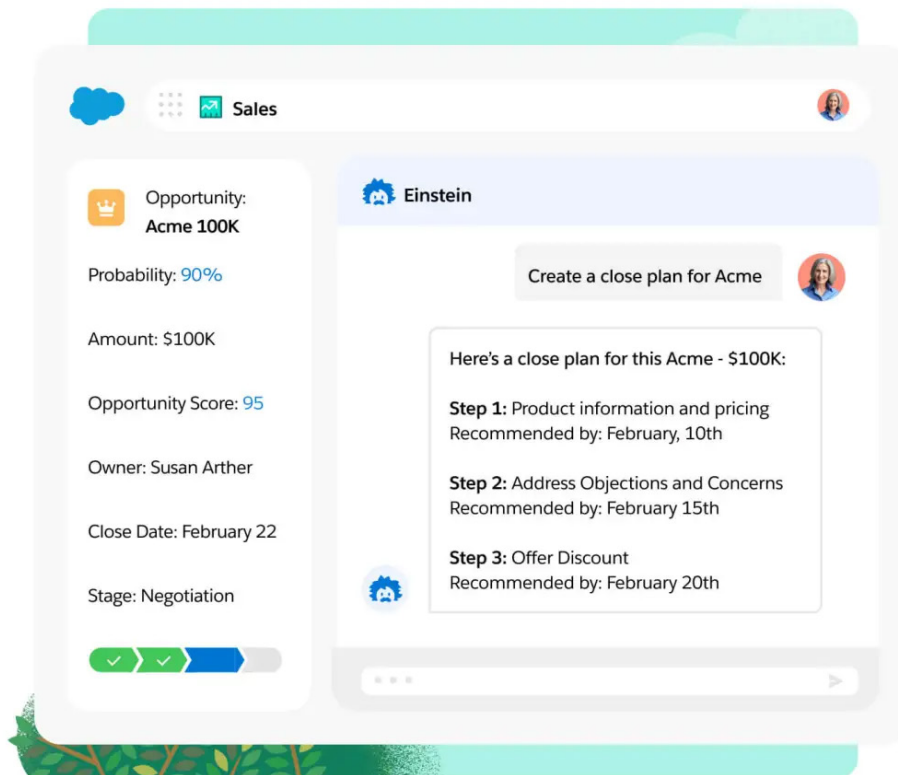
Suppose you're a sales rep for an outdoors brand, and you want to identify and research your top three leads. Even a few years ago, this could take you hours. But with an AI copilot, the work is done in minutes. Prospect quality can be quickly gauged by flagging recent news from the company, like if it plans to invest in new markets or expand its product portfolio.

Now let's say you want to email that customer about a new sleeping bag product launch. You simply write a prompt right in your CRM, using natural language like, "Email Richard Reed about our new sleeping bag line." The AI will pull up Richard Reed's record, see that you have previously worked with him and, in seconds, draft an email that shares the latest product information while referencing previous interactions.



Then when he's ready to buy, the copilot can suggest optimal meeting times based on his past preferences, generate a task list, mark the deal as closed, and update the opportunity.

That's the power of a single copilot that uses your customer and sales data to support your team.





Sales AI in Action: Crexi

Sales reps at Crexi save an average of five hours per day with Sales AI.

Crexi, a commercial real estate marketplace, struggled with sales teams spending too much time on manual tasks, like drafting emails, writing call notes, and conducting customer research. This left less time for crucial relationship-building and revenue-generating conversations. That's why the company turned to generative AI in Salesforce Sales Cloud.

Sales Cloud is a complete sales CRM platform that helps sales teams manage every aspect of how they operate – from strategy and nurturing leads to closing deals and growing revenue. By using Einstein in Sales Cloud, Crexi was able to simplify its sales processes without compromising customer data.

Now the company's sales reps get quick AI-generated customer insights and concise call summaries, helping them adjust strategies and maintain consistent communication. AI tools like Next Best Action also provide personalized follow-up recommendations, enabling faster and more accurate responses to prospects.

As a result, Crexi's sales processes have greatly improved. AI insights from top-performing reps enhance the overall sales strategy and save teams an average of five hours per day overall. Now Crexi's sales teams can focus on building stronger relationships with prospects and customers, leading to more successful outcomes.

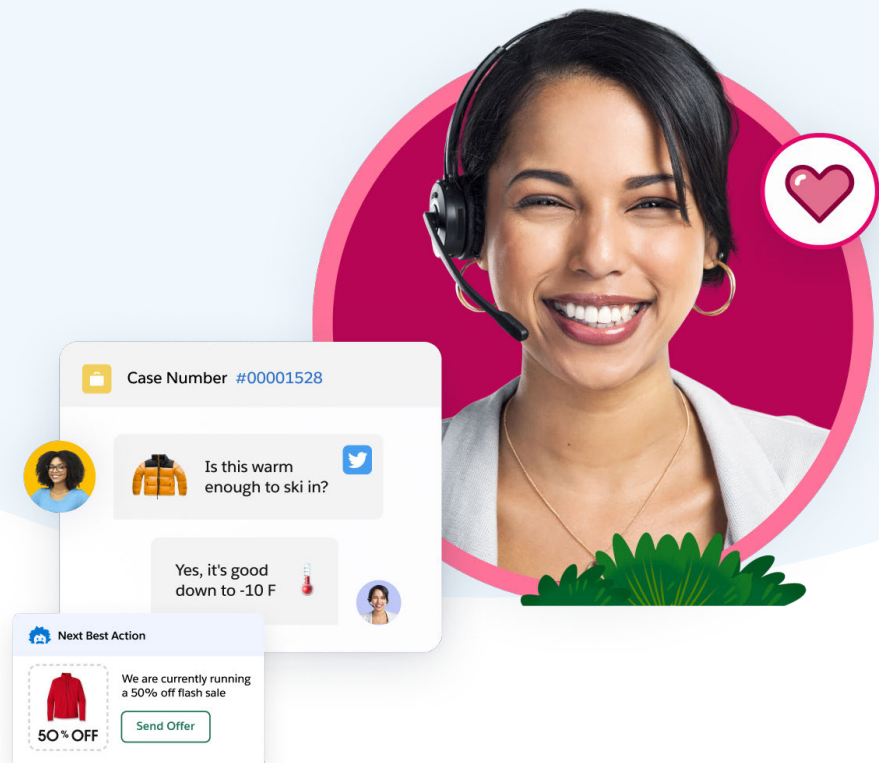
[Read the full story here >](#)



Top 3 AI Use Cases for Service

Customer expectations are higher than ever, with [72% of customers](#) staying loyal to companies that offer faster service. At the same time, [69% of service agents](#) find it challenging to balance speed with quality.

How can you address these two realities? AI can help customer service teams do more with less.



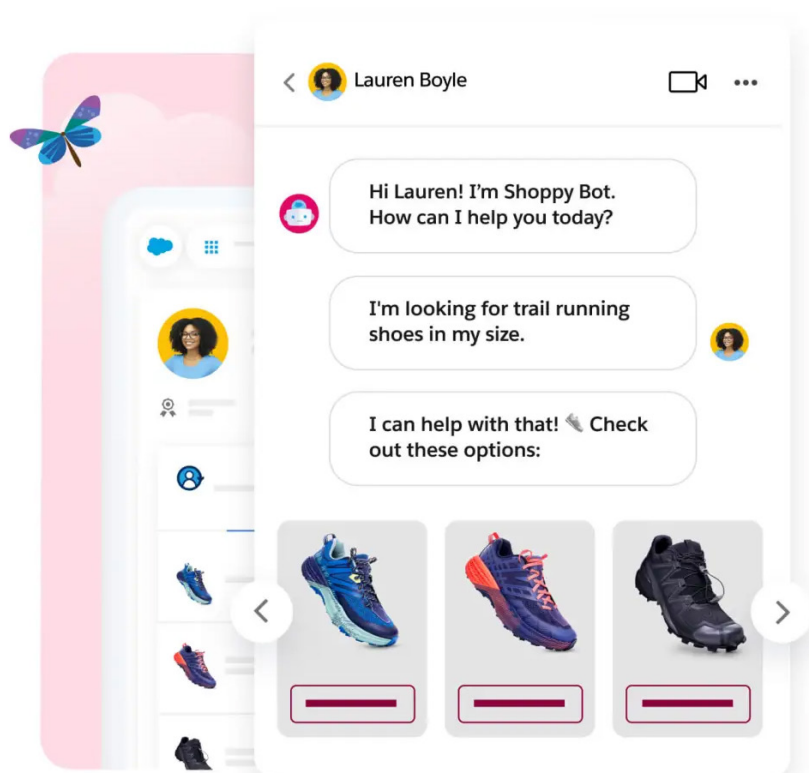
Quickly resolve simple customer inquiries without agent assistance

AI can act as an invaluable assistant for customer service teams, streamlining workflow and increasing agent productivity.

Let's say you're a service rep. You've historically spent a ton of your time working through a pile of simple requests. But AI can take those cases off your plate, reducing the number of tickets you need to resolve yourself. Here's what that looks like.

Customers chat with an AI bot to resolve simple requests – creating a seamless, friendly experience that's also highly efficient.

Only after a customer's needs exceed the AI bot's capabilities are they transferred to you, the live agent. At that point, you can see the entire conversation they were having with the AI bot and what actions were already taken.

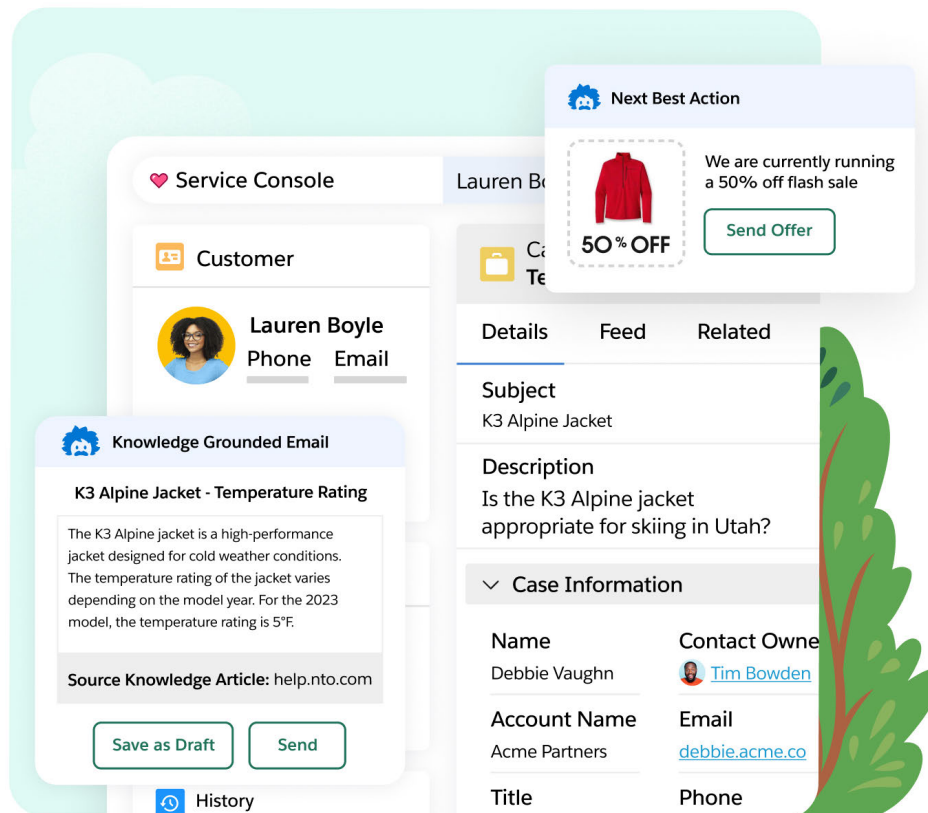


Respond to customers faster

Even when the request reaches you, AI isn't out of the equation. It's still there to assist you in searching and sorting potential resolutions, using the knowledge articles and resources in your CRM.

When you ask the AI for help with a specific case, it'll provide the information you need directly in your agent console. It'll show you a list of recommended knowledge articles for you to check out – marked by how relevant they may be to helping with this case.

And when you find the right article, the AI can auto-generate a personalized email response, which you can customize and send over to the customer. It can even detect increased negativity, offer tips for defusing a situation, and flag a supervisor to ask for additional resolution options.

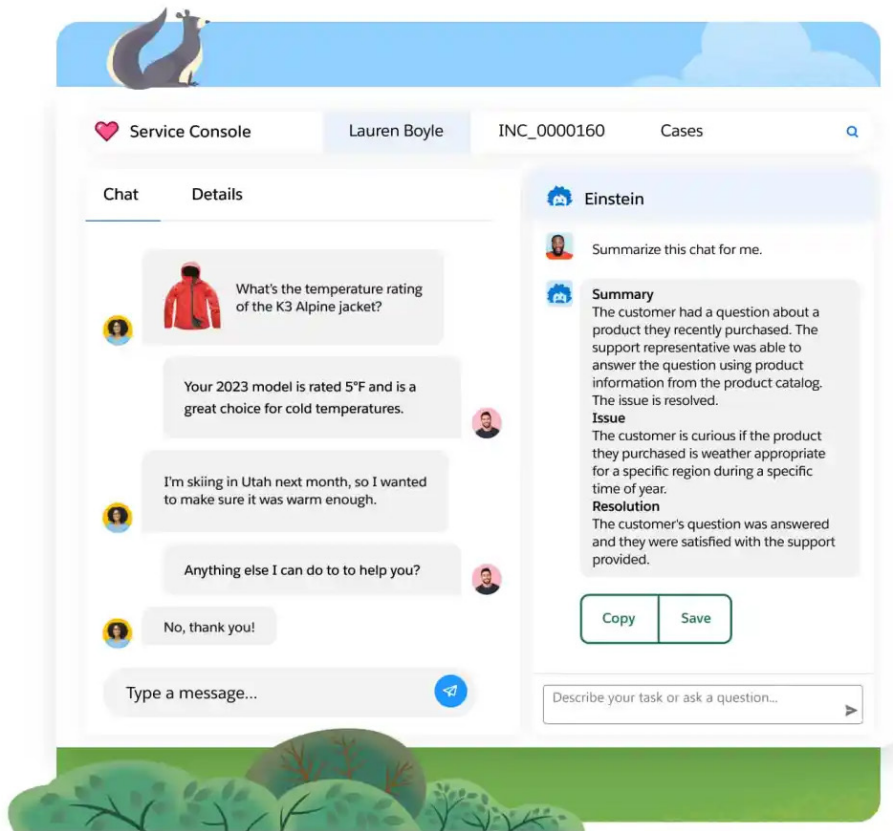


Summarize conversations and cases quickly

When it's all said and done, you need to log the case. Generative AI can automatically draft case summaries based on case data and history, saving them directly to the customer profile to help inform future interactions and replies.

This not only saves time, but also allows service operation teams to analyze caseloads, and create knowledge articles or new workflows to continuously improve service quality.

As you close out cases, you can even use generative AI to create and send customer satisfaction surveys, as well as summarize the responses from those surveys.





Service AI in Action: MadeComfy

An average of 41% of MadeComfy's daily live chat requests are resolved by AI bots without human intervention.

MadeComfy, a short-term rental management company, needed to improve its system for guest communication. Salesforce Service Cloud allowed it to integrate data from ticketing systems, booking systems, and more, to consolidate and enhance customer interactions across all touchpoints. And AI was a big part of the transformation.

Service Cloud is one complete, AI-powered platform that transforms how service teams deliver value, from the contact center to the field. With Einstein for Service, MadeComfy introduced AI bots to manage routine questions. The company was able to automate responses for common queries, resulting in 41% of chat requests being resolved without live agent interaction. This automation now allows the team to concentrate on more complex issues, boosting overall service efficiency.

Einstein for Service further supports MadeComfy's customer service team by generating concise summaries of interactions, which are saved to customer profiles. This feature ensures consistent communication and helps agents quickly review customer and case histories so they can provide high-quality customer service.

[Read the full story here >](#)




Conclusion

AI is positioned to boost small business productivity across the board – from marketing to sales to service. And when your AI is built into your CRM, you never have to waste time toggling between tabs. Everything we've talked about can be done on a single platform, giving you everything you need to:

- Reach your target audiences with the right message, at the right time
- Empower your sales team to close more deals, faster
- Close cases efficiently and allow customers to find answers on their own

To start building your AI future right now, check out these resources and use cases.

Marketing




Find out more about how you can use AI in marketing.

[Read the Report](#)

[Watch Demo](#)

Sales




Learn more about AI-driven solutions in sales.

[Get the Playbook](#)

[Watch Demo](#)

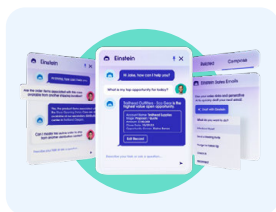
Service



Discover how AI is transforming service support.

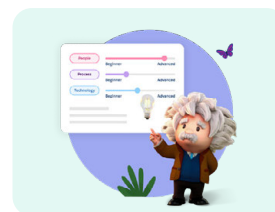
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