

salesforce

The Guide to AI for Small Businesses

Breaking down Artificial Intelligence (AI) and how you can incorporate it into your business.



Contents

Introduction: AI Can Transform Your Small Business for the Better 3

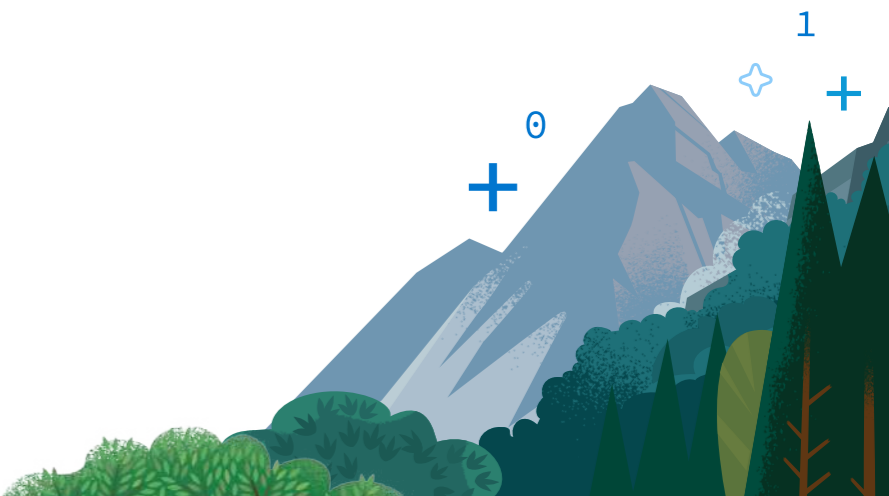
Chapter 1: Exploring Use Cases for Integrating AI into Your Operations 4

Chapter 2: An Effective AI Strategy Is Built on Data and Trust 8

Chapter 3: AI In Action – Stories from Small Business Trailblazers 12

Conclusion: How You Can Apply AI + Data to CRM 15

Learn More 16



Introduction: AI Can Transform Your Small Business for the Better

AI is a game-changer for marketing, sales, and customer service, and companies of all sizes are racing to take advantage of it. Technological breakthroughs, like [generative AI](#), unleash new possibilities for what your teams can accomplish, while also freeing up their capacity to concentrate on strategic business tasks. With AI, SMBs (small and medium businesses) can amp up support and personalization, and keep up with customers' rising expectations.

With any new technology, establishing data regulations and guidelines upfront is essential. AI cannot exist without data, and AI's success is dependent upon trust. Despite that, 52% of customers don't believe AI is safe and secure¹, AI is the number one priority for many CEOs, so bridging the trust gap should be a priority. Having reliable data and being transparent with its use and management are key facets to bolstering trust from your customers and building a good foundation when introducing AI functionalities. With a thoughtful data strategy in place, putting AI into practice is simpler than it seems.

AI sometimes has the perception of being a daunting technology, however, it's not here to replace humans, but to accelerate the work of your employees and amplify your customer experience. AI makes everything about your customers' experience more personalized, efficient, and friction-free. And organizationally, it helps your teams work smarter and faster by automating and optimizing routine tasks.

¹ Source: [Mitre-Harris Poll Survey on AI Trends, September 2023](#).



AI is the broad concept of having machines think and act like humans.

Predictive AI uses past events and data to predict future outcomes or actions.

Generative AI creates net new content based on provided information and data.



1

Exploring Use Cases for Integrating AI into Your Operations



01

To make the most out of AI in your small business, it's important to figure out which departments and tasks can achieve the biggest gains. Take a close look at what's going on in different parts of your operations to spot tasks and processes that could benefit from smart AI tweaks. By finding the areas where AI can give you useful insights, improve decision-making, make customers happier, or save money, you'll be able to align the tech with your overall business goals and create real value for your customers.

SMB Marketers Can Benefit by Using AI to Automate and Optimize

Marketing is a natural fit for AI as it can involve tedious manual tasks such as editing, tailoring messages, and filtering through customer data. But imagine the time that your small business marketing teams could have for more strategic responsibilities if you use AI to expedite these time-consuming tasks.

Two ways you can begin integrating [AI into your marketing](#) department are through automation and optimization. With the upcoming [phase out of third-party cookies](#), your teams will likely pivot to a stronger dependence on first-party data. If you have accurate, unified (not siloed) data, you can use generative AI to identify customer patterns and automatically surface recommendations. Employing AI, you'll be able to ask almost any question about your customers, past content, future campaigns, ROI – you name it – and get an answer instantly from first-party data.



With new data regulations around third-party-data, cookies are expected to be phased out in 2024.

01

On top of that, SMB teams can save countless hours by improving efficiency across the entire marketing campaign lifecycle. Not to mention the personalization AI can provide you by building out customer journeys and creating content based on real-time customer data profiles. You'll save time and your customers will receive the personalized experience they desire.

Some ways your marketing teams can begin practicing with AI today are through:

- Researching customer opportunities
- Writing campaign briefs
- Generating copy with your brand voice
- Optimizing internal workflows (such as reporting, email send times, or content management)



The Adoption of AI Can Help Your SMB Sales Reps Focus on Their Customers

Building relationships is critical for SMB sales reps, but there are many other tasks that your sales team needs to complete to be successful. Analyzing market data, researching accounts, and creating sales reports are just some of the tasks that take away from your reps' selling time. But what if AI could do the background work for you, so that you could focus more on your customers? Good news, it's very possible.

Your small business can use AI to help build such comprehensive [sales strategies](#), that you can diminish the gap between your junior and senior sales representatives. Your sales professionals will save time, increase productivity, and improve precision by using generative AI for writing prospecting emails, building relevant and unique sales plans, and creating tailored sales materials. Plus, much of their preparation and reporting can be accelerated, diminishing the time spent on mundane tasks.

A few of the most common [sales AI](#) use cases that reps currently explore include:

- Prioritizing opportunities
- Summarizing calls and identifying best next-step actions
- Generating personalized communications

01

SMB Service Agents Can Save Time by Delegating Tasks to AI

These days, there are multiple ways for customers to contact you – from phone to email to chat to SMS. Customers expect service agents to provide accurate and relevant information, reply in a timely manner, and resolve issues quickly. On top of all the other tasks on your agent's plate, these standards can become overwhelming – especially when done manually.

Cue AI. SMB [service agents can utilize AI](#) to streamline tasks such as responding to customers. Generative AI can automatically construct a human-like reply to any question. When grounded in your customer data and knowledge base, you can personalize these generated replies, making them more trustworthy and aligned with your company's voice. Your agents can review the suggestions from the AI and easily send. Similarly, generative AI can take the most complex email and chat conversations and produce a wrap-up summary on behalf of your agents, saving tons of time and effort on data entry.

AI can also speed up your service in live time. When assisting a customer, there is typically limited time to read through pages of documentation or locate every detail of a knowledge base article. Yet, agents aren't off the hook for identifying the right information to solve your customer's query. Generative AI can help your agents and customers find the answers they need faster and easier. Ultimately, saving time for all parties and reducing frustration.

Check out some of these use cases SMBs are currently using for their customer service:

- Producing case summaries
- Generating reply recommendations
- Personalizing chat bots
- Generating knowledge articles



2

An Effective AI Strategy is Built on Data and Trust

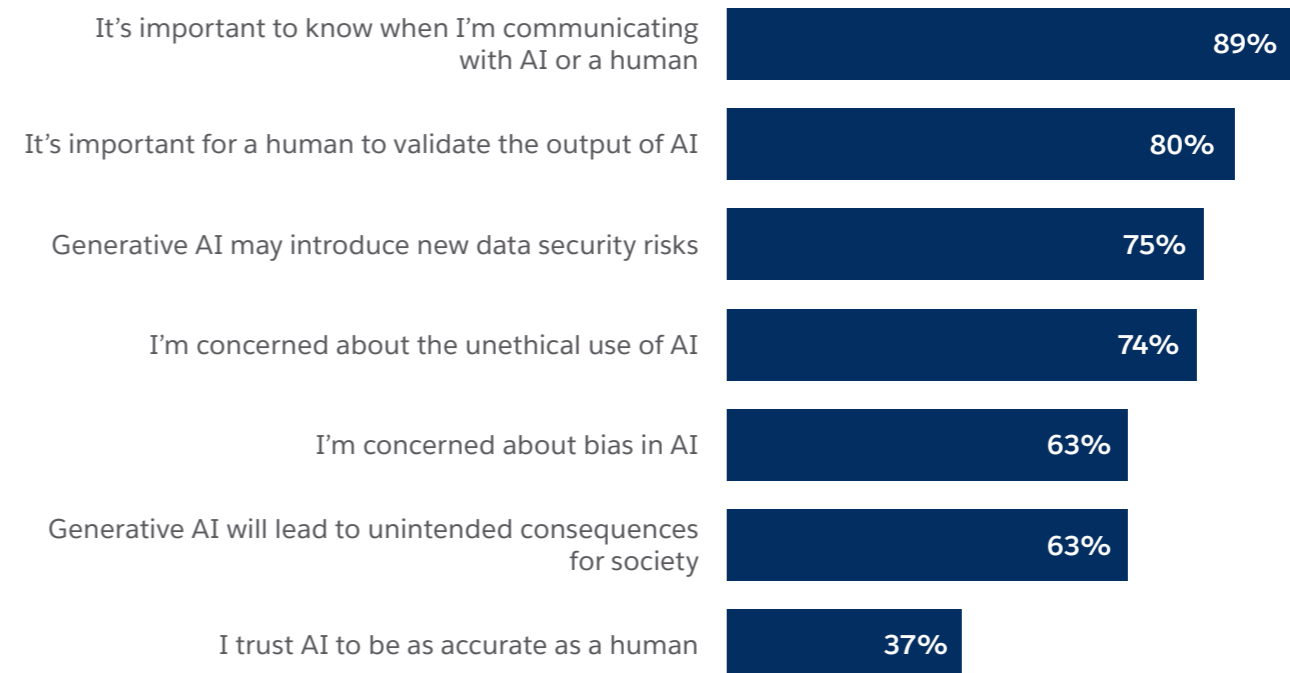


02

When it comes to technology, transparent use of data is essential. When you use data effectively, you can make your customers feel known, but you can also risk their loyalty if misused. So, when beginning to use AI, trust needs to be the foundation. Some customers are hesitant about AI due to concerns about the security, ethics, and bias of generative AI. As a result, nearly 90% of them expect it to be very clear whether they're communicating with a human or a bot. And the majority – around three in four customers – expect assurances that their interaction with AI is secure and that the company is using the technology ethically.² AI – and specifically how you wield your customer data – represents an opportunity for your SMB to put customers at ease and build trust.

Customers Show AI Usage Requires Trust

Customers Who Agree With the Following



Source: Salesforce State of the Connected Customer, Sixth Edition, August 2023.

² Salesforce State of the Connected Customer, Sixth Edition, August 2023.



02

That's why setting up a trusted [AI strategy](#) is important. You will only earn your customers' trust if you can demonstrate that outcomes and decisions made by generative AI models are effective, accurate, and free of bias and toxicity. It's important to put ethical guardrails and guidance in place to help you innovate responsibly, stay ahead of potential issues, and create safe, trustworthy practices for your business.

Start [building trust](#) with generative AI:

- Define and align on ethical [principles and guidelines](#) for your business
- Establish a diverse team to lead routine risk reviews and use tools to detect bias
- Provide employee [education](#) to spot bias and reduce risk
- [Offer transparency](#) into your model's inputs, outputs, and potential biases
- Ensure large language models (LLMs) do not retain your data

With a foundation of trust, you can shift your focus to preparing your technology and data. Every AI project starts as a data project. And that data? It can't live in silos. If it does, you risk lower quality outputs from your gen AI. Determining the best department(s) for you to introduce AI, then connecting, organizing, and harmonizing your data is essential for a thriving AI model. Additionally, clearly defined company policies surrounding AI tech and tool usage must be communicated to avoid ambiguity and protect company confidentiality. So, readying your technology is the next step to ensure your AI success.

Start [readying your technology](#):

- Define data metrics, customer value principles, and use cases for [incorporating AI](#) in your departments
- Prepare your data environment by connecting your [customer data/profiles](#) and establishing one unified source of truth
- Ensure your usage of [clean data](#) – free of inaccuracies, duplications, and blanks
- Update your security and purchasing guidelines to include trust standards like [data masking](#) and zero retention to ensure your data remains safe



While there's much excitement about the benefits of AI, training for [proper and ethical usage is vital](#). To increase your employees' confidence in utilizing AI within their role, they must first feel comfortable and educated on how to use it. Trainings can include improving general knowledge around AI, or sharpening your employees' skill sets in data literacy, analytical thinking, and even prompt writing. When deciding which AI use cases to experiment with, available training and considering your employees' experience can be a good place to start. Even if AI is a completely new concept to your company and workers, upskilling doesn't have to be an intimidating or expensive task due to offerings of [free training](#).

Ideas for how you can effectively [equip your people](#):

- Determine which skills your workforce needs and already has, then [set priorities](#)
- Allow time and resources for employees to receive [training](#)
- Encourage your workforce to continuously [upskill](#) as AI technology evolves



Check out [Trailhead](#), the fun, free online learning platform from Salesforce to learn all about AI.

GET STARTED WITH AI

3

AI In Action: Stories from Small Business Trailblazers



03

Wonolo agents get 20% of their time back with AI-generated replies

AI is rapidly transforming business operations both externally and internally. But don't just take our word for it, hear from companies who are currently implementing AI in their organizations.

Wonolo, which means "Work Now Locally," is a company based in Oregon that serves two customers: people looking for work and businesses looking for workers.

Before introducing AI, Wonolo needed a more efficient solution that could handle its data volume and customization needs. Now, Wonolo is improving agent efficiency, confidence, and consistency with their AI-generated chat replies.

When business customers need help promoting new jobs or employees need paperwork assistance, AI-generated chat dialogues help agents reply in seconds and reduce handle times by 20%. The prompts also make it easier for agents in other countries to confidently provide answers in English.

Wonolo AI results:

20%

decrease in average
handle time

2-3

seconds for AI
replies, compared
to 5-10 seconds

5+

hours saved in
one week with
11 agents

Wonolo

[Read the full story of Wonolo](#)

03

PaySauce takes the leap to experiment with AI in their internal operations

PaySauce is a New Zealand-listed B2B start-up that strives to make payroll simple and easy for small businesses. Now, they are breaking into AI capabilities to further enhance their customer service and support.

PaySauce has begun developing AI capabilities to help augment their employees' technical knowledge, ensuring customers are provided with effective and efficient support. Serving a diverse range of small business industries, the Support Team was previously constrained by each employee's own area of expertise and learned knowledge to answer customer queries. Mathew Stokes, Chief Operating Officer of PaySauce, was intrigued by the ways AI could improve PaySauce's business. Stokes started experimenting with AI and realized it would allow employees to broaden their capabilities by leveraging a centralized company-wide knowledge base.

PaySauce implemented an internal chatbot, powered by [Service Cloud Einstein](#), to assist with framing cross-industry RFPs, research, and customer responses. Now, they don't have to rely on industry specialists; rather any employee can feel confident tackling any query by using the chatbot's AI abilities to shape answers and respond to customers in a timely manner. By introducing AI internally first, it allows the team to "fact check" the responses before communicating back to the customer – maintaining their values of prioritizing the customer experience.

Tips for getting started with AI:



Start every AI project as a data project.

Stokes shared that the amount of work they put into refining their data and knowledge was as much of an investment as implementing AI.



Be proactive with AI experimentation.

PaySauce established a strong knowledge base and KPIs for future data to adhere to – you don't want to start late AND not have your data ready.



Experiment with AI internally first.

This allows employees to adjust while also protecting customers from a negative experience.

While they are still in the beginning stages of their experimentation with AI, PaySauce leaders are enthusiastic. In fact, they are already identifying areas to further explore utilizing AI.



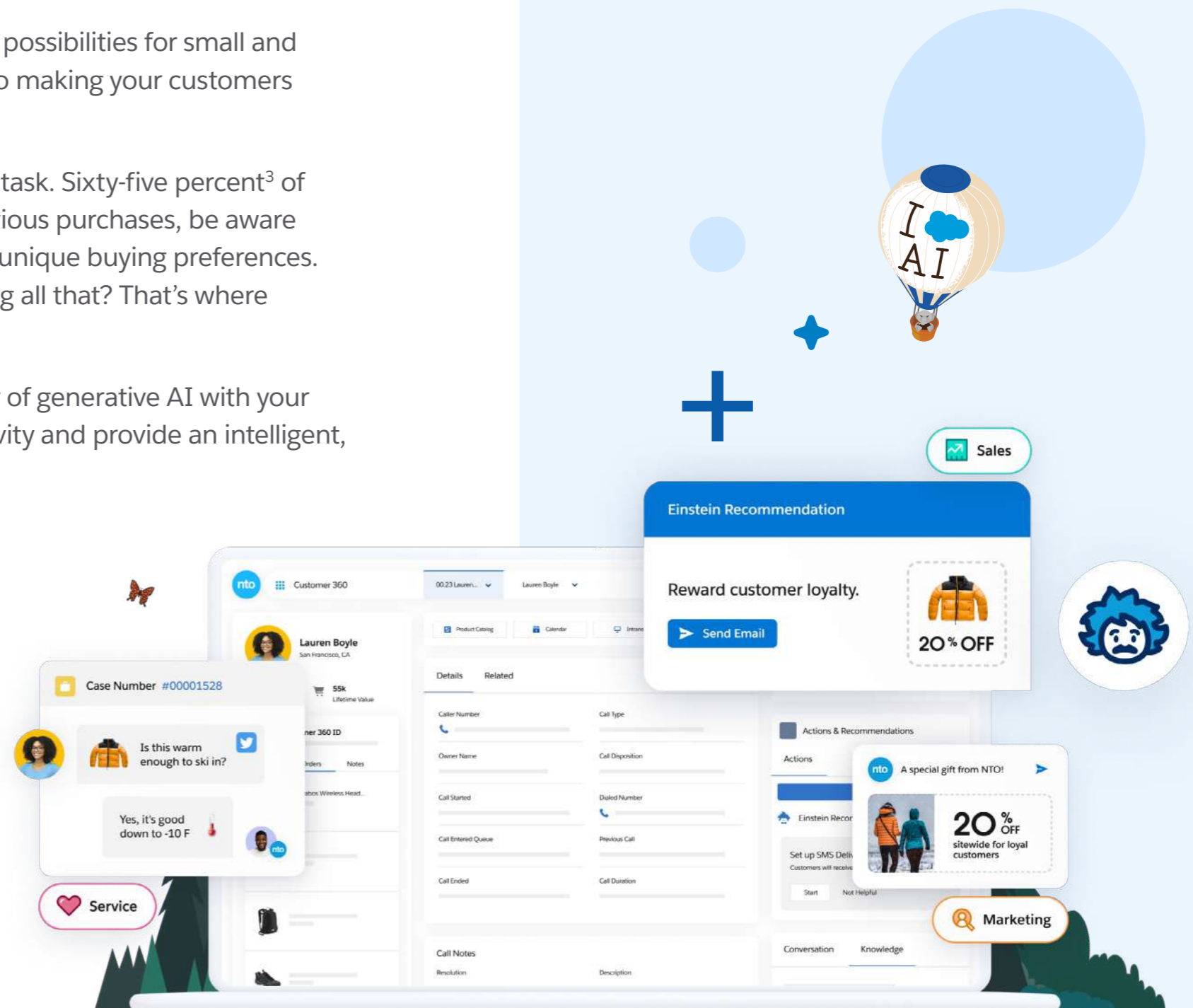
[Read more about PaySauce's digital transformation](#)

Conclusion: How You Can Apply AI + Data to CRM

Generative AI, and AI in general, is full of possibilities for small and growing businesses. But when it comes to making your customers happy, an intelligent [CRM](#) is key.

Keeping customers satisfied is no simple task. Sixty-five percent³ of customers expect you to remember previous purchases, be aware of seasonal needs, and understand their unique buying preferences. Wouldn't it be nice to have help managing all that? That's where [AI-enabled CRM](#) comes in.

An AI-enabled CRM combines the power of generative AI with your customer data to enhance your productivity and provide an intelligent, [360 degree view](#) of your customers.



³ Salesforce State of the Connected Customer, Sixth Edition, August 2023.



Learn More

About Salesforce

Salesforce is the customer company. From the day we opened our doors, focus on our customers drove our every decision. It fueled our growth and powered our customers' success. We make cloud-based software designed to help businesses connect to their customers in a whole new way, so they can find more prospects, close more deals, and wow customers with amazing service. With hundreds of thousands of customers and millions of users, Salesforce is a proven choice and the #1 CRM in the world.

Questions? We'll put you on the right path.

Ask about Salesforce products, pricing, implementation, or anything else. Our knowledgeable reps are standing by, ready to help.

CONTACT US

AI at Salesforce

Salesforce AI delivers trusted, extensible AI grounded in the fabric of our Platform. With [Salesforce Einstein](#), you can empower sellers, agents, marketers, and more with AI tools grounded in your customer data to make every customer experience more impactful. Utilize our AI in your customer data to create customizable, predictive, and generative AI experiences to fit all your business needs safely. Bring conversational AI to any workflow, user, department, and industry with Einstein.





Additional Resources

- [Salesforce Artificial Intelligence](#)
- [AI Strategy Guide](#)
- [3 Things Marketers Can Do Faster with Generative AI](#)
- [4 Ways Your Contact Center Can Get Started With Generative AI](#)
- [Trends in Generative AI for Sales](#)
- [What is Generative CRM – And What Will It Mean For Your Business?](#)
- [AI From A to Z: The Generative AI Glossary for Business Leaders](#)
- [State of the Connected Customer, Sixth Edition](#)





The information provided in this report is strictly for the convenience of our customers and is for general informational purposes only. Publication by Salesforce, Inc. does not constitute an endorsement. Salesforce.com does not warrant the accuracy or completeness of any information, text, graphics, links, or other items contained within this guide. Salesforce.com does not guarantee you will achieve any specific results if you follow any advice in the report. It may be advisable for you to consult with a professional such as a lawyer, accountant, architect, business advisor, or professional engineer to get specific advice that applies to your specific situation.