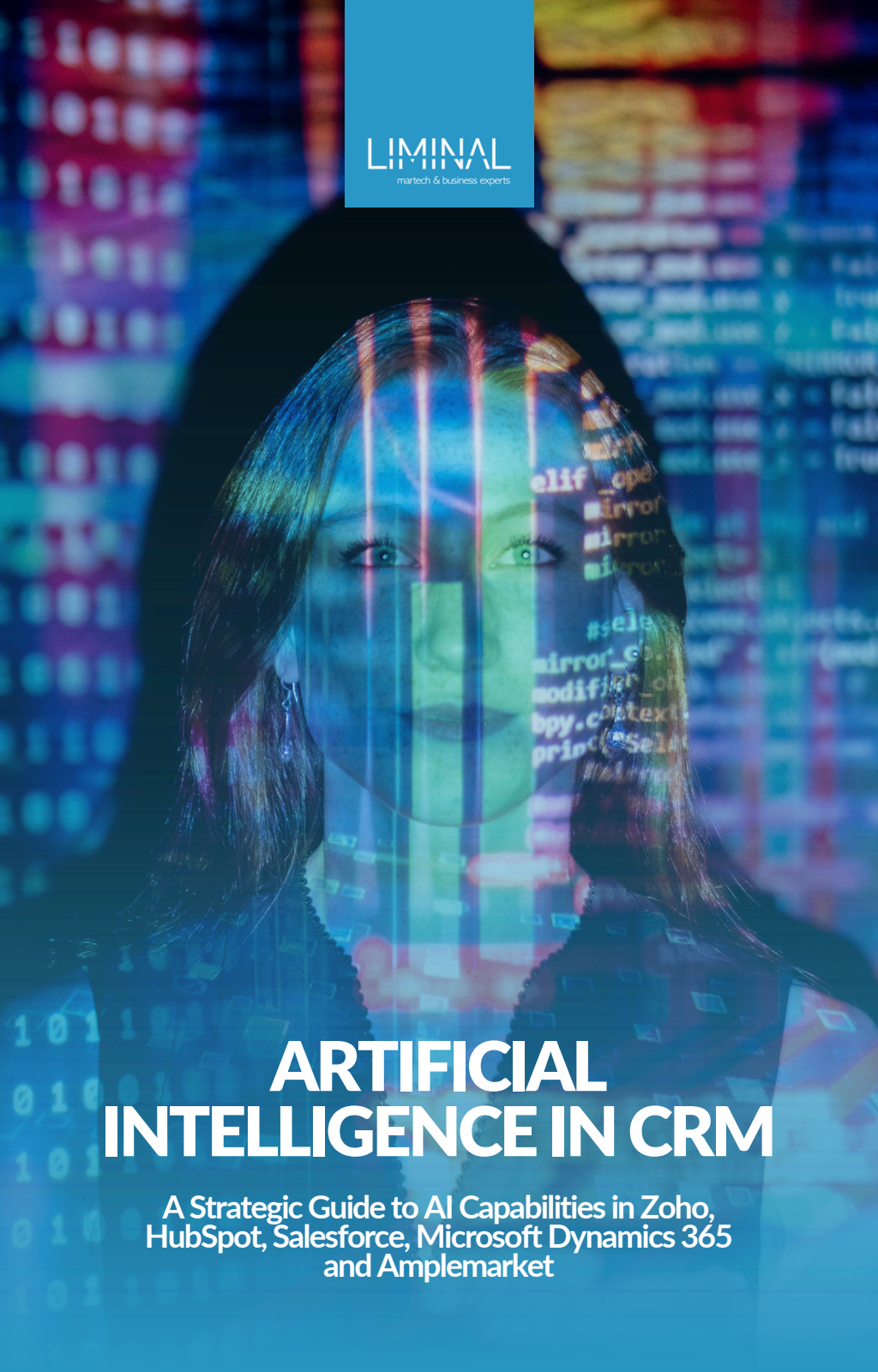


A woman's face is the central focus, partially obscured by a digital overlay. The overlay consists of vertical lines of light in blue, green, and red, and various snippets of code and data. The background is a blurred grid of colorful numbers and text. The overall aesthetic is futuristic and tech-oriented.

LIMINAL
martech & business experts

ARTIFICIAL INTELLIGENCE IN CRM

A Strategic Guide to AI Capabilities in Zoho,
HubSpot, Salesforce, Microsoft Dynamics 365
and Amplemarket

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INTRODUCTION

Artificial intelligence is changing the role of CRM platforms. Traditionally, CRM systems were mainly used to store customer information, manage sales opportunities and record interactions. Today, they are increasingly able to analyse data, summarise conversations, predict outcomes, recommend actions and automate parts of the customer journey.

This evolution creates new opportunities across marketing, sales and customer service. Sales teams can use AI to prioritise leads, prepare for meetings and identify opportunities that require attention. Marketing teams can generate and personalise content more efficiently. Service teams can respond to recurring questions, summarise cases and improve access to knowledge. Managers can use predictive insights to improve forecasting, monitor customer health and support decision-making.

However, not all AI capabilities are the same, and the leading platforms approach them differently. Zoho uses Zia across CRM configuration, forecasting, scoring and communication analysis. HubSpot brings its AI tools together under Breeze, combining assistants, agents, content generation and data management. Salesforce connects Einstein, Agentforce and Data Cloud to support more complex enterprise processes. Microsoft integrates Copilot and AI agents across Dynamics 365 and the wider Microsoft ecosystem. Amplemarket applies AI more specifically to B2B prospecting, intent signals, account research and outbound pipeline generation.

The value of these capabilities depends on more than the technology itself. AI performs best when companies have reliable data, clearly defined processes and a strong understanding of which tasks should be automated and which decisions still require human judgement.

This guide examines the main AI capabilities available in each platform, the business processes they support and the conditions required to generate measurable value from their implementation.



WHAT DOES IT REALLY MEAN TO HAVE ARTIFICIAL INTELLIGENCE IN A CRM?

Artificial intelligence in CRM can refer to several different capabilities. Some tools generate content, others analyse information or predict outcomes, while more advanced systems can recommend and execute actions. Understanding these differences is essential when comparing platforms, because not every AI feature delivers the same level of complexity, autonomy or business value.

The main categories of AI in CRM are:

- **Generative AI**, which creates or transforms content.
- **Analytical AI**, which interprets information and identifies patterns.
- **Predictive AI**, which estimates the likelihood of future outcomes.
- **Prescriptive AI**, which recommends the most appropriate next action.
- **Agentic AI**, which executes tasks within predefined rules and permissions.

Generative AI is usually the most visible capability. It can write sales emails, summarise meetings, create marketing copy or prepare customer service responses. Its main benefit is increased productivity, as teams can reduce the time spent on repetitive content creation.

However, generated content still requires review. A message can be well written and remain factually incorrect. This is particularly important when content includes pricing, contractual information, technical claims or commitments to customers.

Analytical AI works with the information already available in the CRM. It can summarise the history of an opportunity, analyse the sentiment of an email, identify recurring topics in customer conversations or highlight changes in commercial activity. Instead of requiring users to review multiple records and interactions manually, the system extracts the information that appears most relevant.

Predictive AI uses historical and behavioural data to estimate the likelihood of a future result. It may predict whether a lead will convert, whether an opportunity will close, whether a customer is at risk of churn or how much revenue is likely to be generated from the current pipeline.

These predictions help teams prioritise their work and allocate resources more effectively. They should not, however, be treated as definitive conclusions. Predictive models

reproduce patterns found in historical data. If a company enters a new market, launches a different product or changes its sales strategy, past behaviour may no longer be a reliable indicator of future results.

Prescriptive AI goes one step further by recommending what should happen next. It may suggest contacting a specific decision maker, sending relevant content, scheduling a follow-up meeting or starting a retention process. The usefulness of these recommendations depends on the quality of the underlying data and the amount of context available within the CRM.

Agentic AI represents the most advanced stage. AI agents can receive an objective, access authorised information and execute several related tasks within predefined limits.

For example:

- A sales agent may research accounts, identify contacts, prepare outreach and update CRM records.
- A service agent may answer customer questions, consult the knowledge base and escalate complex cases.
- A marketing agent may prepare campaign assets, create audience segments and recommend next actions.

The main difference between an agent and a traditional automation is the ability to interpret context. An automation follows fixed rules. An agent can work with unstructured information and adapt its actions to the situation.

This flexibility creates greater potential value, but it also increases risk. As the level of autonomy grows, companies need stronger controls over permissions, information sources, authorised actions and human approval.

ARTIFICIAL INTELLIGENCE DEPENDS ON OPERATIONAL QUALITY

A company should not begin an AI project by selecting a feature. It should begin by identifying the operational problem it wants to solve.

An organisation may want to reduce the amount of time salespeople spend preparing for meetings. It may want to improve forecast accuracy, respond more quickly to customer requests or identify cross-selling opportunities. Each objective requires different data, processes and levels of automation.

A meeting summary depends on a transcript being correctly associated with the relevant contact and opportunity. A churn model requires sufficient historical information about customers who stayed and customers who left. A prospecting agent depends on clear criteria for the ideal customer profile, priority segments and authorised messaging.

When data is incomplete, artificial intelligence works with a partial view. If teams do not record activities, the system cannot understand how the relationship is developing. If duplicate contacts exist, the interaction history may be fragmented. If opportunity values and close dates are not updated, forecasts become unreliable.

The most common conditions required for AI to produce useful results are:

- Reliable and sufficiently complete CRM data.
- Clearly defined commercial and service processes.
- Consistent use of the platform by the teams.
- Defined rules for automation and escalation.
- Clear ownership of data quality and knowledge management.
- Metrics that allow the company to evaluate business impact.

AI does not replace data governance or process design. Its effectiveness comes from the combination of technology, information and operational discipline.

Before granting autonomy to an agent, the company must define which actions can be executed automatically and which require human validation. A response to a frequently asked question may be automated. A contractual amendment, a financial commitment or a complex commercial proposal should continue to be reviewed by a person.

ZOHO AND ZIA

Zoho presents its artificial intelligence capabilities through Zia. Within Zoho CRM, Zia supports areas such as system configuration, forecasting, scoring, communication analysis, data enrichment and next-action recommendations.

One of the most distinctive aspects of Zoho's approach is the use of artificial intelligence in the administration of the CRM itself. Zia does not only assist sales and marketing users. It can also help administrators create modules, configure workflows and build reports.

This is relevant because many CRM implementations require processes that go beyond the standard structure of leads, contacts, accounts and deals. A company may need to manage applications, distributors, contracts, technical requests, equipment or other specific business objects.

NATURAL LANGUAGE MODULE CREATION

Zia allows users to describe a new CRM module in natural language. The user explains what needs to be managed and which information should be stored. The platform then proposes an initial structure, including fields and data types.

For example, a company could ask Zia to create a module for distributor requests containing the company, request type, priority, owner, deadline and status.

This reduces the time required to build the first version of the module and helps connect business users with CRM administration. The process owner can explain the operational need without having to define every technical detail from the beginning.

The result should still be reviewed. The administrator must confirm that the fields are appropriate, that unnecessary duplication has not been introduced and that the new module is correctly related to the remaining CRM records.



WORKFLOW CREATION WITH ZIA

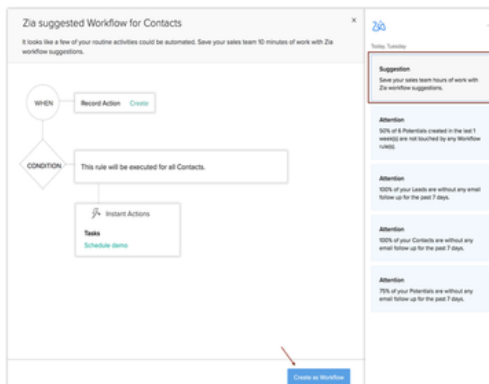
Zia can also help convert a business instruction into a workflow. A team might ask the CRM to create a task when a lead has had no activity for three days, provided that it is assigned to a salesperson and does not already have a meeting scheduled.

The platform interprets the request and creates the initial workflow structure. Depending on the configuration, Zia can support actions such as:

- Creating tasks.
- Updating fields.
- Assigning owners.
- Sending notifications.
- Scheduling calls or meetings.
- Applying tags.
- Triggering webhooks or custom functions.

The main benefit is speed, but the generated automation must be reviewed carefully. A lead may have no activity because the team is waiting for a response. A task may already exist. The lead may belong to a strategic account with different rules.

AI can accelerate workflow creation, but it does not replace process analysis.

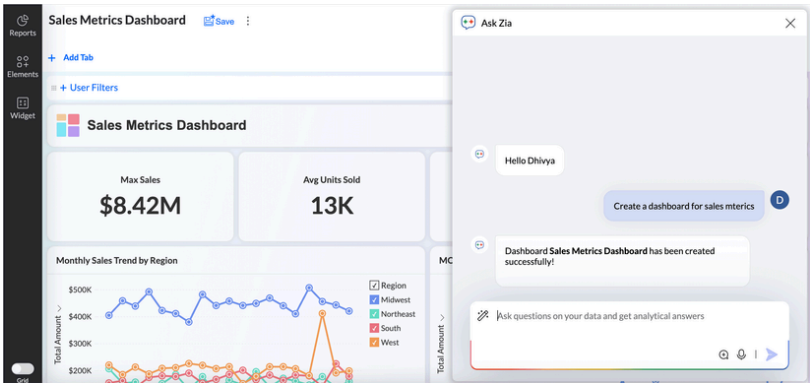


NATURAL LANGUAGE REPORTING

Zia also allows users to create reports by describing the business question they want to answer.

A sales director could request a report showing revenue generated by customers in a specific segment, divided by industry and compared with the previous period. The system identifies the available fields and produces an initial report structure. This improves user autonomy and reduces the dependency on administrators for basic reporting requests.

However, AI cannot correct inconsistent business definitions. If one team defines an active customer differently from another, the report may be technically correct but commercially misleading.

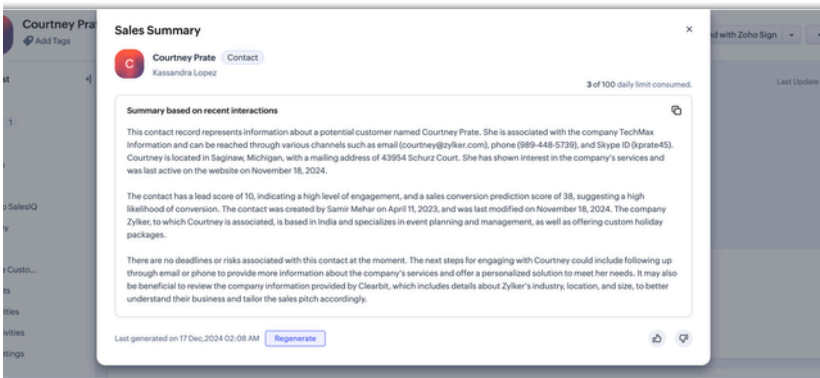


RECORD SUMMARIES

CRM records often contain large volumes of information, including emails, calls, meetings, notes, field changes and tasks. Before a customer meeting, a salesperson may need to review the complete history to understand the context.

Zia can create a summary of the main interactions, identified needs, decisions and outstanding activities. This is particularly useful when an account changes owner, when an opportunity is reactivated after a long period or when a manager needs to review the pipeline quickly.

The summary should be used as an overview rather than a substitute for the original records. Important details related to pricing, contractual conditions or commitments should still be confirmed in the underlying activity.



Sales Summary

Courtney Prate Contact
Kassandra Lopez

3 of 100 daily limit consumed.

Summary based on recent interactions

This contact record represents information about a potential customer named Courtney Prate. She is associated with the company TechMax Information and can be reached through various channels such as email (courtney@zyliker.com), phone (989-448-5793), and Skype ID (cprate45). Courtney is located in Saginaw, Michigan, with a mailing address of 43954 Schurz Court. She has shown interest in the company's services and was last active on the website on November 18, 2024.

The contact has a lead score of 10, indicating a high level of engagement, and a sales conversion prediction score of 38, suggesting a high likelihood of conversion. The contact was created by Samir Mehar on April 11, 2023, and was last modified on November 18, 2024. The company Zyliker, to which Courtney is associated, is based in India and specializes in event planning and management, as well as offering custom holiday packages.

There are no deadlines or risks associated with this contact at the moment. The next steps for engaging with Courtney could include following up through email or phone to provide more information about the company's services and offer a personalized solution to meet her needs. It may also be beneficial to review the company information provided by Clearbit, which includes details about Zyliker's industry, location, and size, to better understand their business and tailor the sales pitch accordingly.

Last generated on 17 Dec, 2024 02:08 AM Regenerate

WRITING ASSISTANCE AND SMART PROMPT

Zia can generate or improve content directly within the CRM. A user can ask it to create a follow-up email, shorten a message, adjust the tone or adapt the communication to the recipient. The main advantage compared with a standalone AI tool is the proximity to CRM data. The email can consider the company, job title, opportunity stage and previous interactions. Possible uses include:

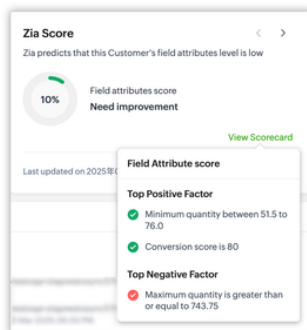
- First-contact emails.
- Meeting follow-ups.
- Opportunity reactivation.
- Objection responses.
- Renewal reminders.
- Internal record summaries.

ZIA SCORES

Zia Scores analyses historical data, activities and record information to calculate the probability of a lead converting or a deal closing.

The score helps sales teams prioritise their work. A lead with a high score may share characteristics with other leads that converted in the past. It may belong to a relevant industry, have a certain company size or demonstrate greater engagement. The score can support several operational actions:

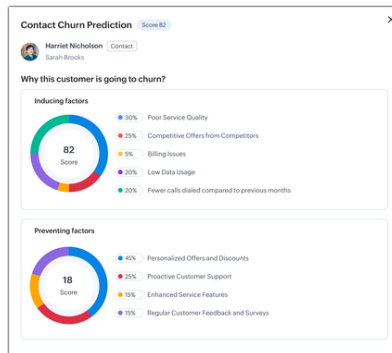
- Ordering lead or opportunity lists.
- Creating alerts.
- Assigning records to specific teams.
- Triggering workflows.
- Prioritising daily sales activity.



CHURN PREDICTION

Zia can analyse customer data and estimate the likelihood of churn. Depending on the process and data available, the model may consider changes in activity, purchase patterns, communication history and other relevant signals. The objective is to allow customer success and account management teams to intervene before the customer formally decides to leave.

The prediction only creates value when it is connected to a retention process. The company must define who reviews the risk, which information should be checked and what actions may be taken.



PREDICTION BUILDER

The Prediction Builder allows companies to create predictive models for processes that go beyond standard lead or opportunity scoring. A business may want to predict:

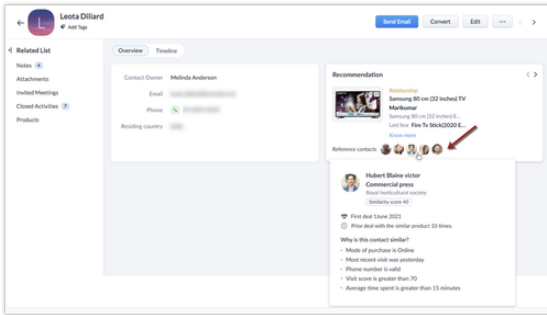
- The probability of a customer purchasing a product.
- The expected result of a request.
- The likelihood of a contract renewal.
- The most probable value of a field.
- The likely category of a new record.

This flexibility is particularly useful for organisations that use custom modules. A training provider might predict whether a customer will renew a programme. An industrial company might estimate which product category a customer is most likely to purchase. The quality of the model depends on the consistency and volume of historical data.

RECOMMENDATION BUILDER

The Recommendation Builder analyses patterns to suggest products or services. It can support cross-selling, upselling and next-offer strategies. A recommendation may consider previous purchases, customer profile, interests and the behaviour of similar accounts.

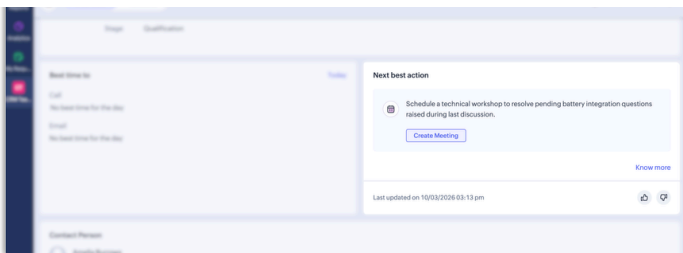
The recommendation should be combined with commercial rules. A product may be statistically relevant and still be inappropriate at that stage of the relationship.



NEXT BEST EXPERIENCE

Next Best Experience attempts to recommend the most appropriate action for a particular record. Rather than only presenting data, Zia may suggest a call, meeting, email, offer or another commercial action.

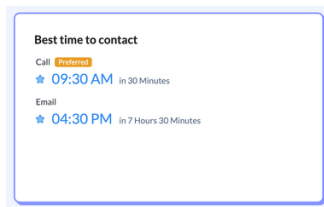
This is especially useful for account managers with large customer portfolios. The system can help identify where intervention is most urgent or potentially valuable. The team should monitor the quality of the recommendations and compare them with actual outcomes.



BEST TIME TO CONTACT

Zia can analyse previous interactions and suggest the periods when a contact is more likely to respond to an email or call.

This can help sales teams organise their activity more efficiently. The value of the recommendation depends on the quantity of historical information. New contacts will naturally have less individual data available. The recommendation does not replace consent, contact preferences or time-zone considerations.

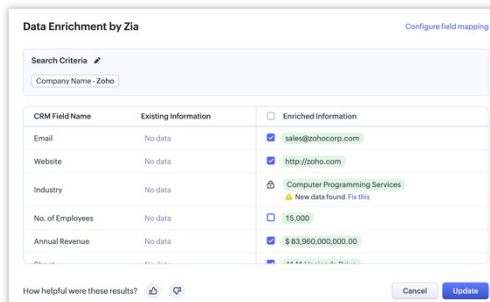


DATA ENRICHMENT

Zia can help complete CRM records using information from available sources and email signatures. It may suggest data such as:

- Website.
- Telephone number.
- Location.
- Company.
- Job title.
- Public profile information.

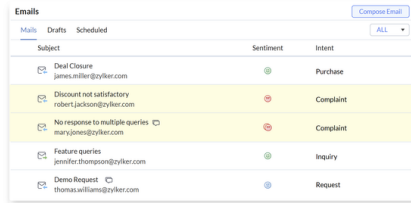
This reduces manual research and improves segmentation. Enriched information should still be reviewed, as roles and company details may have changed.



EMAIL INTELLIGENCE

Zia can analyse the content of emails and identify sentiment, intent, emotion and references to competitors. Imagine a customer email that expresses dissatisfaction, mentions a delay, requests a meeting and states that another provider is being evaluated. Zia can separate these signals and help the team recognise that the message requires urgent attention.

Email intelligence can support prioritisation, routing and follow-up, especially in teams that manage a high volume of communications.



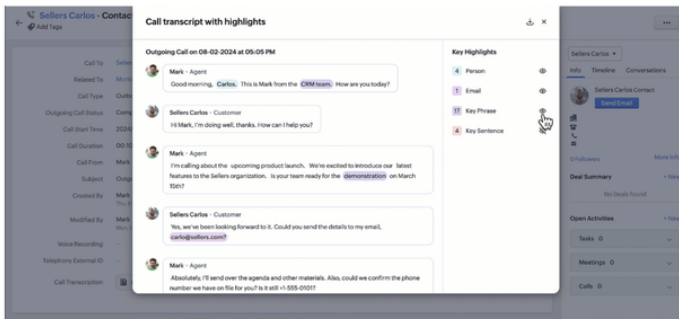
Emails		
Subject	Sentiment	Intent
Deal Closure james.miller@zyler.com	😊	Purchase
Discount not satisfactory robert.jackson@zyler.com	😡	Complaint
No response to multiple queries mary.jones@zyler.com	😡	Complaint
Feature queries jennifer.thompson@zyler.com	😊	Inquiry
Demo Request thomas.williams@zyler.com	😊	Request

CALL INTELLIGENCE

Zia can transcribe calls and analyse elements such as topics, sentiment and intent. This reduces dependence on manual note-taking and can support:

- Meeting follow-ups.
- Sales coaching.
- Quality control.
- Objection analysis.
- CRM record completeness.

Companies must define appropriate consent, access and retention policies before recording and analysing conversations.



Sellers Carlos - Contact

Call transcript with highlights

Outgoing Call on 08-02-2024 at 09:09 PM

Key Highlights

- Person
- Email
- Key Phrase
- Key Sentence

Call Transcript:

Mark - Agent: Good morning, Carlos. This is Mark from the CRM team. How are you today?

Sellers Carlos - Customer: Hi Mark, I'm doing well, thanks. How can I help you?

Mark - Agent: I'm calling about the upcoming product launch. We're excited to introduce our latest features to the Sellers organization. Is your team ready for the demonstration on March 15th?

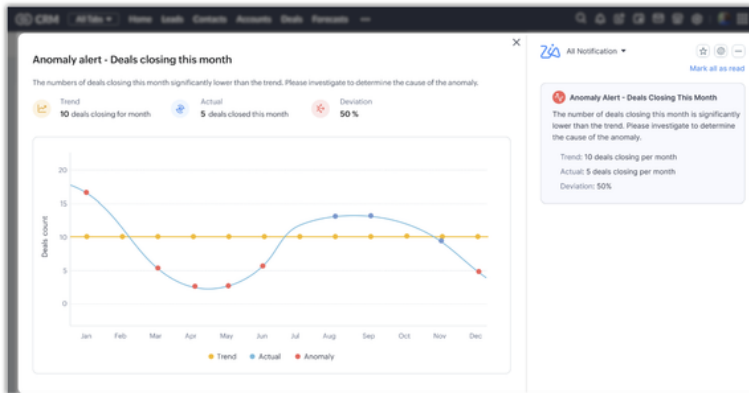
Sellers Carlos - Customer: Yes, we've been looking forward to it. Could you send the details to my email, carlos@sellers.com?

Mark - Agent: Absolutely! I'll send over the agenda and other materials. Also, could we confirm the phone number we have on file for you? It's still +1 555 0001?

ANOMALY AND TREND DETECTION

Zia can identify unexpected changes in performance, such as a sudden drop in conversion, an increase in the sales cycle or a reduction in commercial activity. The platform identifies that a metric is behaving outside its normal pattern. It does not necessarily identify the exact cause.

The team must investigate whether the anomaly results from data quality, seasonality, process changes or a genuine business issue.



WHERE ZOHIO DELIVERS THE MOST VALUE

Zoho offers a broad combination of configuration support, predictive intelligence, communication analysis and recommendations.

It is particularly relevant for organisations that want to customise the CRM and create processes that go beyond standard sales management. Its main strengths include:

- Extensive CRM customisation.
- AI support for administrators and business users.
- Predictive models for standard and custom processes.
- Communication intelligence.
- Integration with the wider Zoho ecosystem.

The main challenge is understanding which capabilities are available in each edition and what data volumes are required. Companies should confirm licensing, regional availability and configuration requirements before making a decision.



HUBSPOT AND BREEZE

HubSpot brings its artificial intelligence capabilities together under the Breeze brand. Its strategy is to integrate AI across marketing, sales, service, content and data management rather than treat it as a separate tool.

The main components include Breeze Assistant, Breeze Studio, specialised agents, knowledge sources, content generation and data enrichment capabilities.

BREEZE ASSISTANT

Breeze Assistant acts as a conversational interface across the HubSpot platform.

Users can ask questions about contacts, companies, deals, campaigns and reports. They can request summaries, create content, prepare for meetings or analyse CRM information.

Within a deal record, a salesperson might ask:

- What are the main risks associated with this opportunity?
- What changed during the last seven days?
- Which activities are still pending?
- Who are the main stakeholders?
- What should be addressed during the next meeting?

The assistant reduces the need to navigate through multiple tabs and activities. The quality of the response depends on the clarity of the question and the quality of the CRM data.

The image shows a user interface for the Breeze Assistant. On the left, a card titled "Breeze Assistant" with a star icon and the text "Your meetings today" displays details for a meeting with Bobby Smith, VP Partnerships, titled "Meeting about Closing the Deal". The meeting is scheduled for today from 8:30 to 9:00 AM, with 4 guests (2 yes, 1 no, 1 awaiting). Below this are "Join Zoom" and "Prepare" buttons. To the right, a larger pink card provides context and objectives. It lists the "Objective" as reviewing and discussing an updated pricing proposal for a Q2 contract renewal. The "Key Context" includes the last discussion centered on the deal Q2 contract renewal, the user's assigned action of preparing an updated pricing proposal, and a note that Bobby Smith recently closed a 2-billion funding round. The "Prep Focus" is to bring a finalized pricing proposal tailored for Q2 renewal.

Breeze Assistant
Your meetings today

Bobby Smith, VP Partnerships
Meeting about Closing the Deal
Today, 8:30 - 9:00 AM
👤 4 guests: 2 yes, 1 no, 1 awaiting

[Join Zoom](#) [Prepare](#)

Objective
Review and discuss the updated pricing proposal for Q2 contract renewal.

Key Context

- The last discussion centered on the Deal Q2 contract renewal.
- You were assigned the action of preparing an updated pricing proposal for this meeting.
- Bobby Smith recently closed a 2billion funding round.

Prep Focus
Bring a finalized pricing proposal tailored for Q2 renewal.

BREEZE STUDIO

Breeze Studio allows companies to create and configure assistants and agents for specific business processes. The organisation can define:

- Instructions.
- Knowledge sources.
- Available tools.
- Authorised actions.
- Escalation conditions.
- Expected output format.

A proposal assistant may receive guidance about service structure, positioning and commercial limitations. A qualification assistant may analyse form submissions and assess whether a lead meets specific criteria. A service assistant may consult internal documentation and prepare responses. This creates a more controlled experience than a generic assistant because the AI works with company-specific knowledge and instructions.

KNOWLEDGE VAULTS

Knowledge Vaults provide the information used by assistants and agents. They may contain product documentation, commercial messaging, processes, policies and frequently asked questions.

The quality of the knowledge source directly affects the quality of the response. If the information is outdated or contradictory, the agent may produce incorrect results. Knowledge management therefore becomes an operational responsibility. The company needs to define who reviews the sources, how often they are updated and which version should be treated as authoritative.

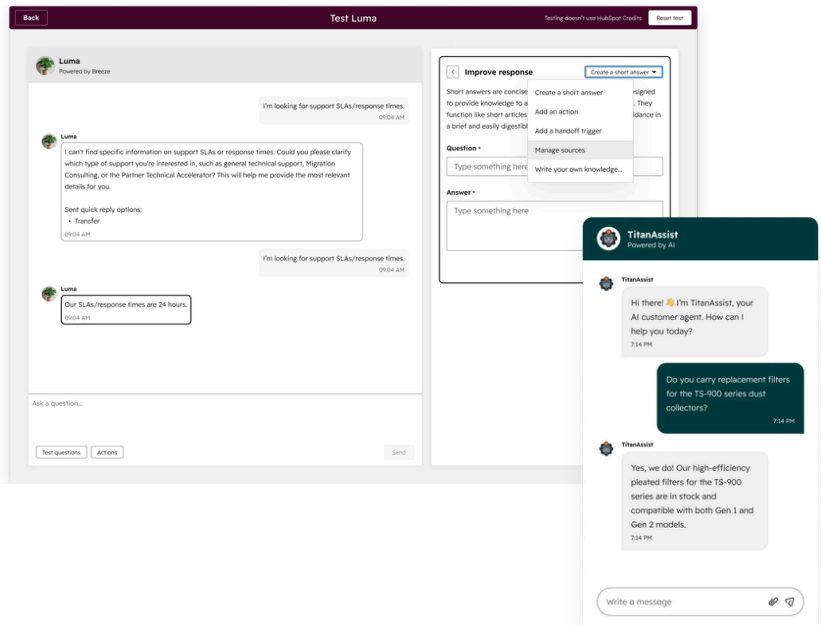
The image shows two overlapping screenshots from the HubSpot Breeze Studio interface. The background screenshot is the 'Internal FAQ Assistant' configuration page, which includes sections for 'Instructions' (with a rule to maintain a friendly tone), 'Set the information this assistant can access' (with checkboxes for 'Web browsing' and 'What this assistant knows'), and 'About this assistant' (with fields for 'Access', 'Assign to teams and users', and 'Description'). The foreground screenshot is a 'Create Knowledge Vault' modal dialog. It has fields for 'Name' and 'Description', both with placeholder text and red error messages. Below these fields is a file upload section with a red error message and a list of supported file types: 'Files (.pdf, .txt, .md, .html, .pptx, .docx)'. At the bottom, there is an 'Upload' button and a section for 'CRM Objects' with a message 'There are no CRM objects added yet.' and an 'Add' button. The modal also features 'Cancel' and 'Create & Add' buttons at the bottom right.

CUSTOMER AGENT

The Customer Agent is designed to answer customer questions through configured service channels. It can use approved content, CRM context and authorised actions to respond to requests. Depending on the configuration, it may also update information, retrieve customer-specific data or transfer the conversation to a human agent. The Customer Agent is particularly relevant for repetitive questions such as:

- Product information.
- Service availability.
- Account access.
- Order or request status.
- Standard processes.
- Basic troubleshooting.

The agent must have clear escalation rules. It should transfer the conversation when it lacks sufficient information, detects frustration, encounters a sensitive issue or reaches an action that requires human approval.



PROSPECTING AGENT

The Prospecting Agent supports commercial research and outreach preparation. It can analyse accounts, gather relevant information, identify potential opportunities and create recommendations for sales engagement. A salesperson may use it to understand:

- What the company does.
- Whether it matches the ideal customer profile.
- Which contacts may be relevant.
- What recent events could create a sales opportunity.
- What type of message should be used.

The agent reduces research time, but it does not replace targeting strategy. If the ideal customer profile is unclear, it will simply generate a larger volume of low-relevance recommendations.

The image displays the HubSpot Prospecting Agent interface, showing various tabs like Overview, Visitors, Research, Signals, and Configuration. The Research tab is active, displaying a list of companies with filters for Research Intent (High) and Visitor Intent. Overlaid on the main interface are several smaller screenshots showing specific features: a 'Sales Prospecting' sidebar with 'Target accounts' and 'Leads'; a 'Contacts' list for Amazon with names like Sally Ride, Jenny Tutone, and Jimmy Neutron; a 'Monitored Companies' section for Amazon, Reddit, Meta, and Disney; and a 'Reason to Reach Out' section with specific insights for each company, such as Amazon's growth and funding, and Disney's product launches.

DATA AGENT

The Data Agent focuses on CRM data quality. It can identify missing information, inconsistent values and opportunities for enrichment. This is strategically important because every AI capability depends on the quality of the underlying data. Missing industries, job titles, deal values or associations affect segmentation, reporting, personalisation and prediction.

The organisation should define which corrections may be automated and which require human validation. A formatting issue may be corrected automatically, while changing the industry or business classification of a company may require review.

The screenshot displays the HubSpot Data Agent interface. The main panel shows a list of smart properties with columns for Object Type, Field Type, Data Source, and User. A specific smart property is selected, showing its details and a list of associated records. A 'Data Agent prompt' sidebar is open, showing a prompt to 'Return exactly one value: High End / Luxury, Mid-end, Low-end, Unknown'. Below the prompt is a 'Preview result' table with columns for RECORD and SMART PROPERTY. The table lists records for 'Made Goods', 'Alstons', and 'Kavet Hospitality', each with a red triangle icon. A 'Data Agent' sidebar is also visible, showing a list of companies: Vello Technology, Newton Logic, Nexory, Foster & Quinn, Ingrid Mikkelsen, and Jasmine Ellington. A 'Data Agent, by HubSpot' sidebar is also visible, showing a 'Create a Smart Property' form with a question 'Does this company sell Marketing software? I want this to be a yes or no answer.' and a 'Which record type do you want to create a smart property for?' section with radio buttons for 'Companies' and 'Contacts'.

Data Agent VIEW HUBSPOT CREDITS

Overview Prompt Library Manage

Search smart properties

You can only remove prompts from smart properties here. To delete properties, go to [Properties Settings](#)

Object Type	Field Type	Data Source	User
SMART PROPERTY			AUTO-FILL
Dining sets, bar stools, buffets, Desks, office chairs, shelving, Patio sofas, dining sets, loungers, Desks, cubicles, task chairs, conference tables, Guest room beds, lobby seating, banquet chairs, waiting room chairs, hospital beds, institutional tables, Cabinets, bookcases, shelving units, Cabinets, bookcases, shelving units, Console tables, benches, room dividers, Expandable tables, modular sofas, storage beds, Wood, metal, plastic, upholstery).			
Go to a primary furniture category page (e.g., Sofas, Sectionals, Furniture).			
Extract visible prices (including MSRP if shown).			
Ignore financing and clearance.			
If price range shown, use average number.			
If MSRP is shown and no other price exists, use MSRP.			
If no pricing on official site, check third-party sites.			
Apply thresholds:			

Data Agent prompt

Return exactly one value:

High End / Luxury
Mid-end
Low-end
Unknown

No quotes. No explanation. One value only.

+ Insert property token + Suggest prompt

Preview result

RECORD	SMART PROPERTY
Made Goods	
Alstons	
Kavet Hospitality	

+ Regenerate

Save prompt Cancel

Data Agent New

Edit Properties
Manage Duplicates
Fix formatting issues
Restore records

Data Agent, by HubSpot

Create a Smart Property

Does this company sell Marketing software? I want this to be a yes or no answer.

Which record type do you want to create a smart property for?

☒ Companies ☐ Contacts

+ Generate property

Recommended Smart Property Templates

Core business
Identifies the fundamental business of the company -- what it does.

Key offerings
Describe the main products, services, or solutions the company provides to its customers.

SPECIALISED BREEZE AGENTS

HubSpot has introduced or tested agents focused on specific processes, including company research, RFP analysis, lost deals, customer health and cross-selling. The logic behind specialised agents is important. A single generic agent is unlikely to perform every task equally well. A narrow agent can be given more specific instructions, knowledge and permissions. Examples of specialised use cases include:

- Analysing lost opportunities and identifying recurring reasons.
- Summarising an RFP and mapping requirements.
- Identifying cross-selling opportunities.
- Reviewing customer health signals.
- Transferring feedback between sales and marketing.
- Researching target companies.

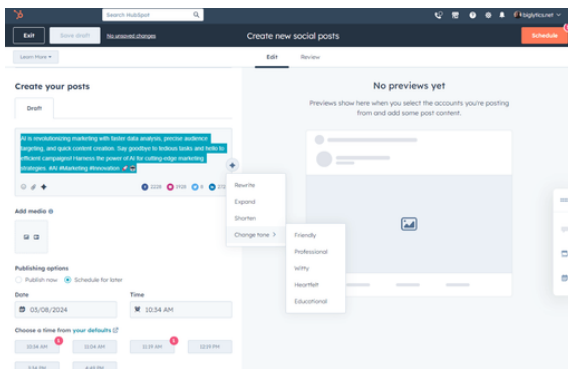
Feature names and availability may vary by edition and release stage.

AI CONTENT GENERATION

Breeze can generate content across marketing, sales and service. It may support the creation of:

- Emails.
- Landing pages.
- Blog articles.
- Social media posts.
- Calls to action.
- Website copy.
- Sales templates.

The main benefit is speed. Teams can create initial drafts, variations and translations without leaving the platform. The risk is increased production of generic content. AI reduces the effort required to publish, but it does not define the strategy, positioning or message. Human review remains essential.

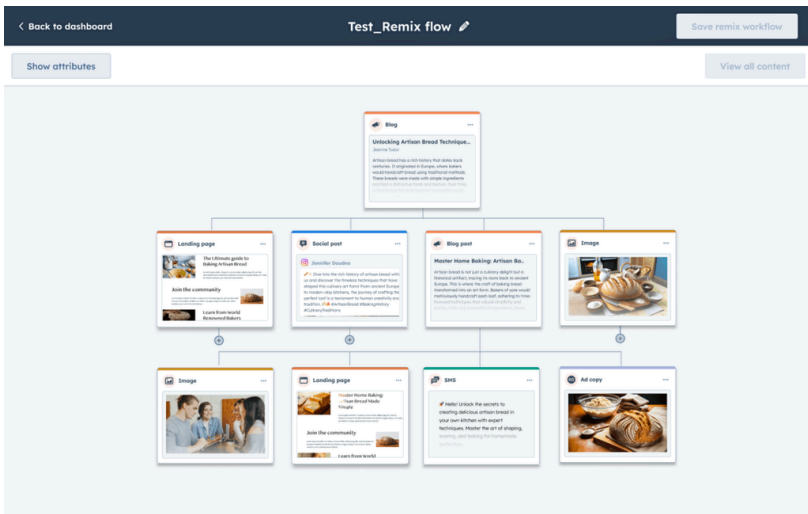


CONTENT REMIX

Content Remix transforms one asset into several formats. A webinar can be converted into an article, an email sequence, social media posts and a landing page. A long-form guide can be transformed into shorter sales and marketing assets.

This helps companies extract more value from existing content.

The output should be adapted to the logic of each channel. An email should not simply reproduce a section of an article, and a social post should not read like a shortened webpage.



AI PERSONALISATION

Breeze can help create different versions of content for specific audiences. Traditional personalisation uses tokens such as first name, company or job title. AI-supported personalisation can adapt the message to the industry, segment, buying stage or customer context.

A campaign may have different versions for Finance leaders, Marketing Directors, Sales managers, existing customers, new prospects or strategic accounts. This increases relevance but also creates more versions to manage. The company must monitor performance and ensure that the AI does not introduce incorrect assumptions.

SMART PROPERTIES

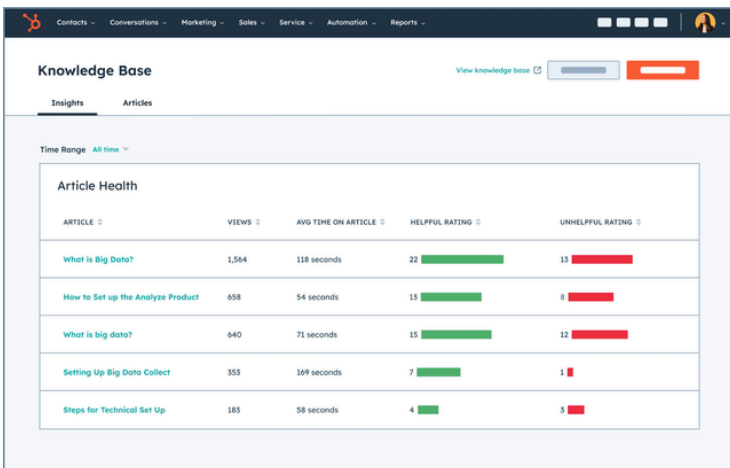
Smart properties use AI to convert unstructured information into CRM fields. A property may summarise a company's positioning, classify its business model, identify its main market or analyse its website. The resulting field can be used in:

- Lists.
- Workflows.
- Segmentation.
- Reporting.
- Lead routing.
- Personalisation.

This makes previously unstructured information operational. Accuracy should be validated before the property is used for high-impact decisions.

KNOWLEDGE BASE AGENT

The Knowledge Base Agent helps create new articles based on identified gaps. When customers repeatedly ask a question that is not properly answered, the system can analyse resolved tickets and prepare a draft article. This creates a continuous improvement cycle. Customer interactions reveal gaps, and those gaps become new documentation. The article should be reviewed before publication, as it becomes an official source for customers, employees and AI agents.



WHERE HUBSPOT DELIVERS THE MOST VALUE

HubSpot stands out for its integrated experience and relative ease of adoption. It is particularly relevant for organisations that want to connect marketing, sales, service, content and data within the same platform.

Its main strengths include:

- User-friendly AI assistance.
- Native connection between CRM data and content generation.
- Specialised agents across different departments.
- Strong alignment between automation and AI.
- Accessible configuration for business teams.

The main areas of attention are feature availability, subscription requirements and credit consumption. As usage increases, companies should calculate the real cost of running agents and AI-powered processes at scale.



SALESFORCE, EINSTEIN AND AGENTFORCE

Salesforce combines several layers of artificial intelligence. Einstein provides predictive and generative capabilities. Agentforce allows organisations to create and operate AI agents. Data Cloud brings together customer data from multiple sources.

This architecture is designed for complex enterprise environments, where AI may need to work across sales, service, marketing, data and custom business processes.

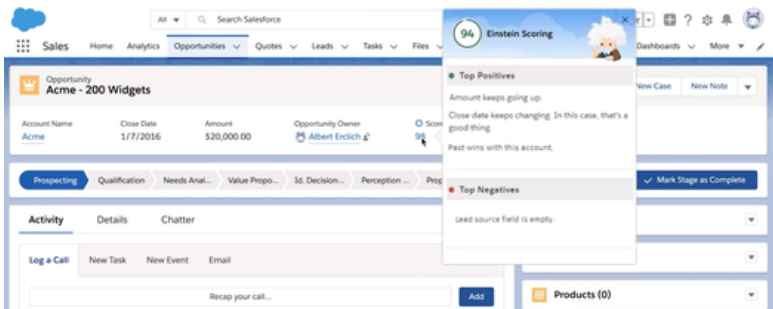
The depth of the platform is an advantage, but it also increases the requirements for architecture, integration, administration and governance.

EINSTEIN LEAD AND OPPORTUNITY SCORING

Einstein Lead Scoring analyses historical conversion patterns and assigns a score to leads. Opportunity Scoring estimates the probability that a deal will close successfully. The scores can present positive and negative factors, helping users understand the reasoning behind the result. An opportunity might receive a lower score because:

- There has been little recent activity.
- The decision maker is not involved.
- The close date has been postponed several times.
- Similar opportunities were previously lost.
- The level of engagement is declining.

Explainability is important because users are more likely to trust a score when they understand what influenced it. The score can support prioritisation, but it should not replace the commercial judgement of the team.

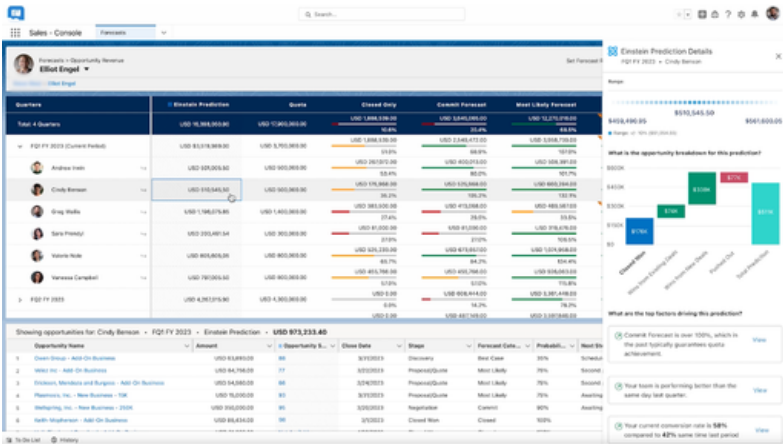


EINSTEIN FORECASTING

Einstein Forecasting adds a data-driven estimate to the forecast prepared by the sales team. The platform can compare the prediction generated by the model with the forecast submitted by managers or salespeople. A significant difference may reveal:

- Excessive optimism.
- Opportunities that are not progressing.
- Deals that are being undervalued.
- Inconsistent stage management.
- Data quality issues.

The objective is not to replace the team forecast. It is to create a more informed discussion and identify where the pipeline requires deeper review.



GENERATIVE SALES EMAILS

Einstein can help create emails using the context available in Salesforce. A salesperson may generate:

- An initial outreach message.
- A meeting follow-up.
- An objection response.
- A reactivation email.
- A renewal message.
- A summary of next steps.

The proximity to CRM data allows the message to consider the contact, opportunity and previous activity. Commercial messages should still be reviewed, especially when they include pricing, commitments or product claims.

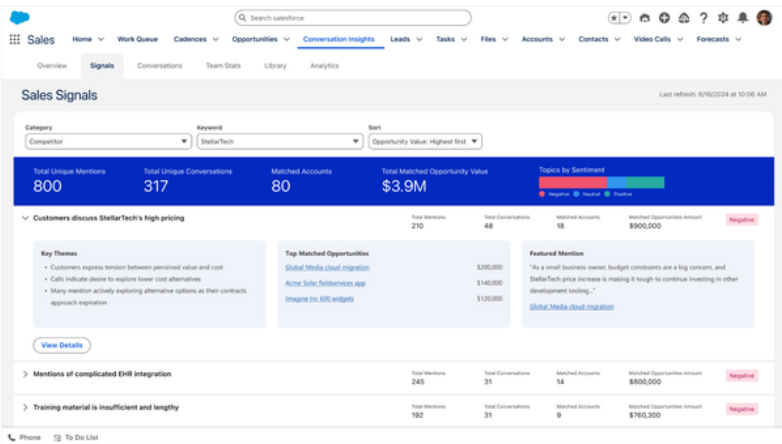
EINSTEIN CONVERSATION INSIGHTS

Einstein Conversation Insights analyses calls and meetings. It can provide:

- Transcripts.
- Summaries.
- Next steps.
- Topics discussed.
- Objections.
- Talk-to-listen ratios.
- Customer feedback.

This information can support coaching and help managers understand how commercial conversations are developing.

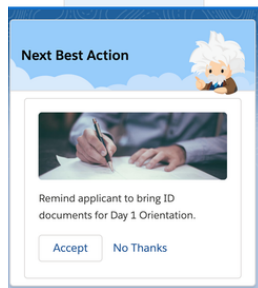
Metrics should be interpreted in context. A discovery call and a contract negotiation require different conversation dynamics. A single metric should not be used to determine whether a call was successful.



EINSTEIN NEXT BEST ACTION

Einstein Next Best Action presents recommendations inside Salesforce records. A recommendation may suggest a product, retention action, renewal step or commercial follow-up.

It can also connect the recommendation to a Flow, allowing the user to execute the action directly. This creates a link between insight and execution. Instead of only receiving an alert, the user can immediately start the relevant process. The company must define eligibility and exclusion rules. A statistically relevant offer may not be appropriate for every customer.



AGENTFORCE SALES DEVELOPMENT REPRESENTATIVE

The Agentforce Sales Development Representative can support lead qualification and nurturing. The agent may answer questions, manage objections, send communications, qualify interest and schedule meetings. It can operate outside normal working hours and transfer qualified opportunities to a salesperson. This creates potential for increased capacity, but commercial autonomy requires strong controls. The agent must know:

- Which products it may discuss.
- Which pricing information it may disclose.
- Which claims it may make.
- When it should request human approval.
- When it must transfer the conversation.

Implementation should begin with a limited scope and expand only after the company has validated the quality and safety of the interactions.

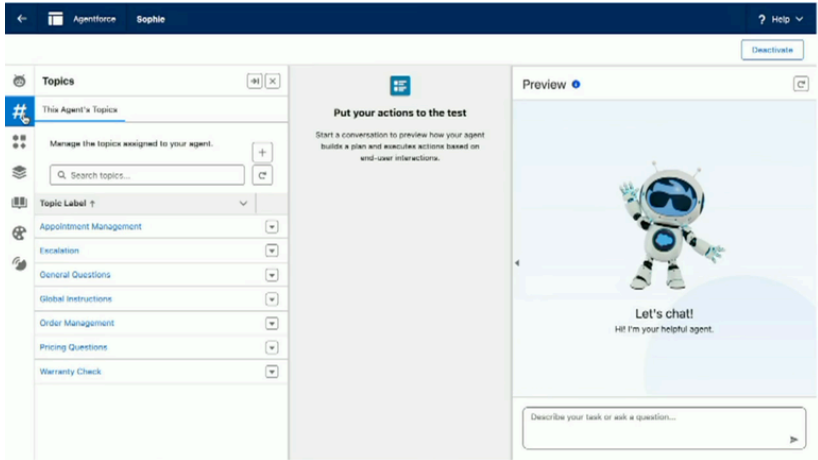
AGENTFORCE BUILDER

Agentforce Builder allows organisations to configure and test agents. The company can define:

- The role of the agent.
- Instructions.
- Topics.
- Available actions.
- Accessible data.
- Escalation conditions.
- Testing scenarios.

This is essential in enterprise environments. An agent cannot depend only on a general prompt. It needs controlled access to systems, specific instructions and deterministic processes for critical actions.

Salesforce can combine flexible reasoning with fixed workflows. The agent may interpret an unstructured request but execute a controlled Flow when the action involves sensitive data or business rules.



AI IN SERVICE CLOUD

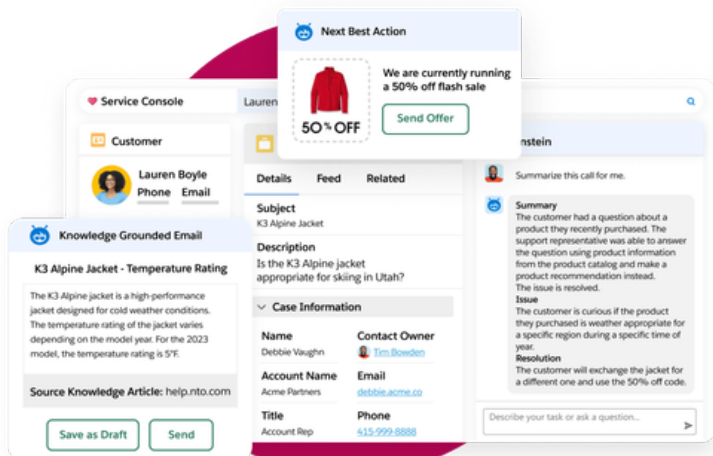
Within Service Cloud, artificial intelligence can support case classification, routing, response creation and closure.

Einstein Case Classification can recommend field values based on similar historical cases. This reduces administrative work and improves routing accuracy.

Einstein Service Replies can suggest responses using the case context and approved knowledge.

Case Wrap-Up can prepare information about the issue, cause, resolution and result. These capabilities reduce the time agents spend documenting and updating cases. AI can also support:

- Case summaries.
- Knowledge recommendations.
- Agent assistance.
- Escalation decisions.
- Customer intent analysis.

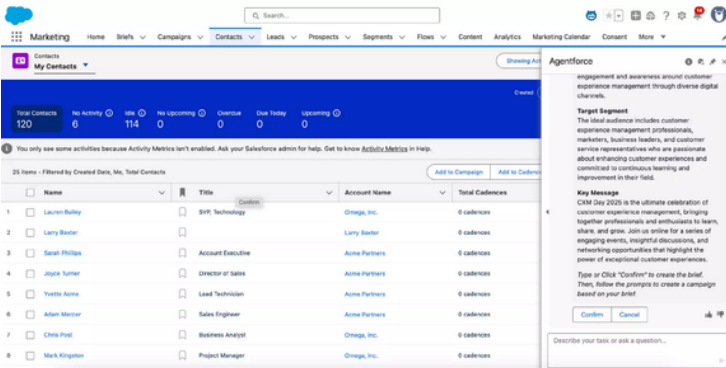


AGENTFORCE MARKETING

Salesforce is extending agentic capabilities into marketing. Agents can support the creation of campaigns, segments, content and customer journeys. A marketing agent may help transform a campaign objective into an initial structure by suggesting:

- Target audiences.
- Messages.
- Channels.
- Journey steps.
- Personalisation rules.
- Next-best actions.

The potential increases when the agent has access to unified customer data.



DATA CLOUD

Data Cloud is designed to connect data from CRM, digital behaviour, transactions, service interactions and product usage. This unified view can be used by Einstein, Agentforce and Salesforce applications. For example:

- A sales agent may consider website behaviour.
- A service agent may consult transaction history.
- A marketing journey may react to product usage.
- A retention model may combine service and commercial data.

Implementing Data Cloud requires integration, identity resolution and governance. A company should not attempt to unify every data source without a clear business objective. It should begin with specific use cases where the additional context creates measurable value.

WHERE SALESFORCE DELIVERS THE MOST VALUE

Salesforce provides significant depth for enterprise operations. It is particularly appropriate for organisations with:

- Complex processes.
- Multiple departments.
- Several customer data sources.
- Advanced customisation needs.
- Enterprise security and governance requirements.
- Resources for administration and development.

Its main strengths include predictive sales intelligence, configurable agents, strong process automation and access to unified customer data.

The main risk is operational complexity. Without strong architecture and governance, the flexibility of Salesforce can create a platform that is difficult and expensive to maintain.



MICROSOFT DYNAMICS 365 AND COPILOT

Microsoft Dynamics 365 differentiates itself through its connection with the wider Microsoft ecosystem. Many users already work daily in Outlook, Teams, SharePoint, Excel and Power BI. Copilot and Microsoft's sales agents are designed to bring CRM information into these applications and reduce the separation between the CRM and everyday work.

A salesperson can receive an email in Outlook, consult CRM information, prepare a response and update the opportunity without moving repeatedly between systems. A meeting in Teams can generate a summary, next steps and a follow-up email. This connection can improve adoption because users interact with CRM data inside familiar tools.

COPILOT IN DYNAMICS 365 SALES

Copilot in Dynamics 365 Sales allows users to ask questions about leads, accounts and opportunities. It can summarise records, highlight recent changes and prepare information for meetings. A salesperson may ask:

- What changed in this opportunity during the last week?
- What are the main outstanding activities?
- Who are the key stakeholders?
- What should be discussed in the next meeting?
- Which opportunities require immediate attention?

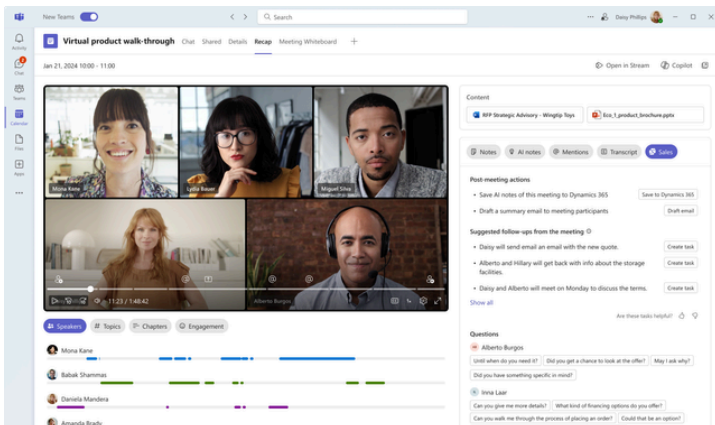
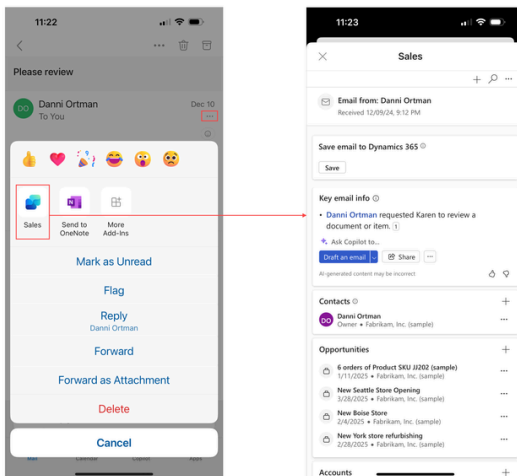
The assistant reduces the amount of time required to review the CRM manually.

The screenshot displays the Microsoft Dynamics 365 Sales interface. The main window shows a lead record for 'Maya Robinson' in the 'Qualify' stage. The record includes contact information (First name: Maya, Last name: Robinson, Job title: Operation Executive, City: New York, Mobile phone: 842-1235-2341, Email: maya@fictive.com) and a timeline. The 'Up next' section lists upcoming activities: 'Introduction call' (today), 'Conference outreach - Step 1' (today), and 'Share product details and check availability for a meeting' (today). The 'Lead score' is 95, Grade A, with a status of 'Improving'. The 'Assistant' section provides notifications and suggestions. On the right, the 'Copilot' sidebar is open, showing 'Chat' and 'Compose' options, and a list of 'Sales meetings for next 7 days' including 'Meeting for 10 Ks coffee machine...', 'Weekly catchup with Maya Robins...', and 'Catchup with Laurence Gilbertson'.

SALES AGENT IN OUTLOOK AND TEAMS

The Microsoft Sales Agent brings CRM information into Outlook and Teams. Within Outlook, a user can access contact and company information, generate a response and record the interaction. Within Teams, the agent can support meeting preparation, opportunity review and collaboration.

This integration reduces administrative work. It also introduces the need for accurate association rules. If messages and meetings are stored against the wrong opportunity or contact, the CRM history becomes unreliable.



MEETING PREPARATION AND FOLLOW-UP

Microsoft's AI capabilities can combine information about participants, opportunities, emails, tasks and previous meetings to prepare the salesperson for a conversation. After the meeting, the transcript may be used to identify:

- Main topics.
- Decisions.
- Objections.
- Next steps.
- Tasks.
- Follow-up messages.

This creates continuity between communication and CRM documentation. The quality of the output depends on the meeting being correctly connected to the relevant records.

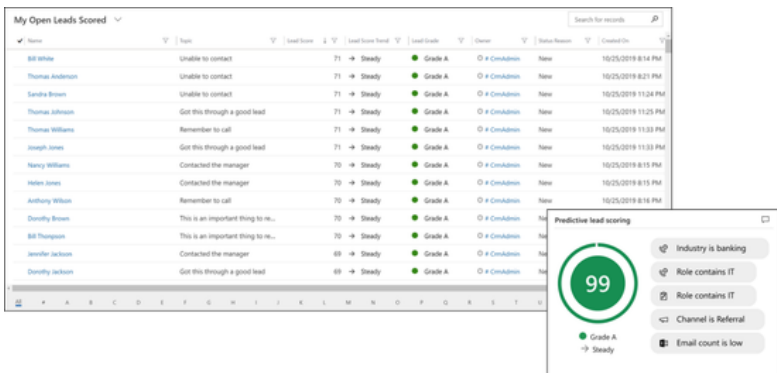
PREDICTIVE LEAD AND OPPORTUNITY SCORING

Dynamics 365 can apply predictive models to leads and opportunities. The models analyse historical data and assign a score that represents the likelihood of conversion or success. The score can be integrated into Sales Accelerator, allowing salespeople to work from a prioritised queue.

This is important because the prediction becomes part of the daily process rather than remaining as an isolated field. Teams can use the score to support:

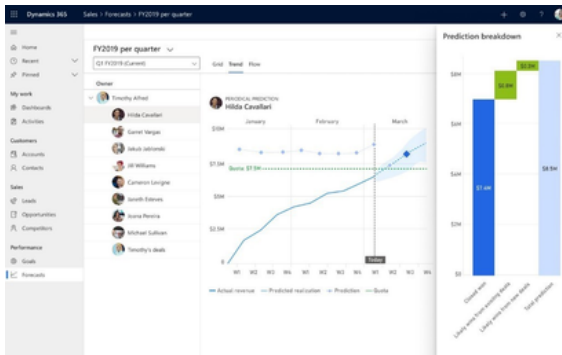
- Activity prioritisation.
- Lead distribution.
- Opportunity reviews.
- Sales sequences.
- Manager alerts.

The scoring model depends on consistent historical data and CRM usage.



PREDICTIVE FORECASTING

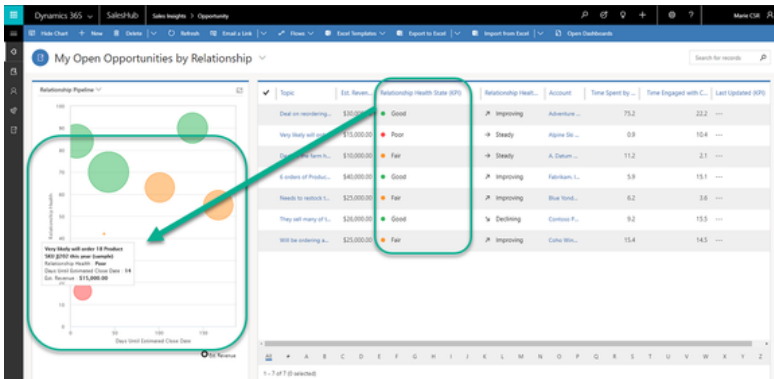
Predictive forecasting uses historical patterns and current pipeline data to estimate commercial results. Management can compare the model prediction with the forecast submitted by the team. This helps identify deviations, weak opportunities and possible overconfidence. The accuracy of the model depends on the quality of the pipeline. Opportunities with outdated close dates, incorrect values or no activity reduce the reliability of the forecast.



RELATIONSHIP ANALYTICS

Relationship Analytics assesses the strength of relationships with contacts and accounts. It may consider activity levels, communication frequency and recent changes. A health score can help identify accounts where engagement is declining.

The platform can also show connections between people. This is especially relevant in complex B2B sales, where dependence on a single contact creates risk. The sales team can use this information to develop broader relationships within the account.



CONVERSATION INTELLIGENCE

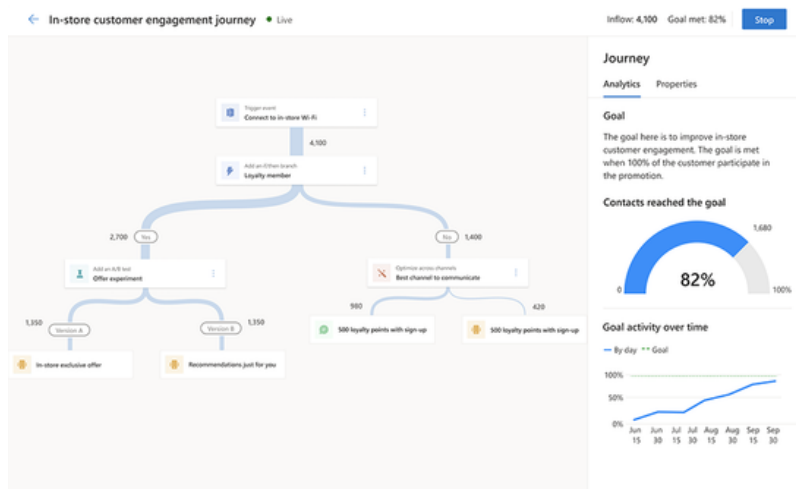
Conversation intelligence analyses calls and meetings. It may provide transcripts, summaries, sentiment, topics, objections and next steps. The information can support sales coaching and help management identify recurring patterns. Possible use cases include:

- Analysing common objections.
- Reviewing discovery quality.
- Identifying missed follow-ups.
- Comparing successful and unsuccessful conversations.
- Improving onboarding and training.

Metrics should not be interpreted without context. Different types of calls require different conversation structures.

COPILOT IN CUSTOMER INSIGHTS JOURNEYS

Within Customer Insights Journeys, Copilot can help users create segments, emails and journeys through natural language. A marketer can describe the target audience and objective, and the system proposes a structure. For example, the user may request a segment of customers who purchased a specific product, have not engaged for several months and belong to a particular region. The platform can then support the creation of a reactivation journey. Natural language makes configuration more accessible, but the team must validate the criteria, exclusions and audience size before activation.

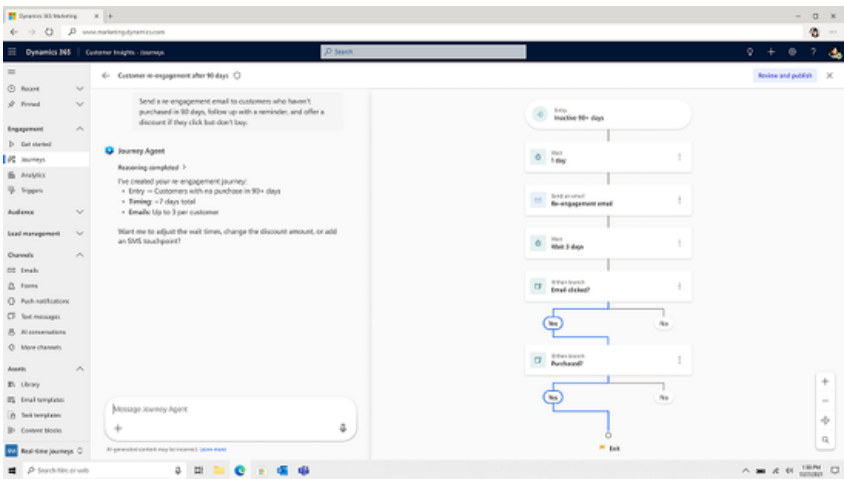


JOURNEY CREATION AGENT

The Journey Creation Agent allows users to build customer journeys through a conversation. The user describes the objective, audience, channels and timing. The agent creates an initial journey. This can accelerate campaign design, although the logic must still be reviewed. A journey may require:

- Waiting periods.
- Exit conditions.
- Frequency controls.
- Consent checks.
- Exclusions.
- Branches.
- Sales handoff.

These requirements may not be fully captured in a short initial instruction.



CUSTOMER INSIGHTS DATA

Customer Insights Data brings together customer profiles and behavioural information. Copilot can help business users ask questions, analyse patterns and create segments. A team might ask:

- Which customers show signs of declining engagement?
- How many customers purchased one product but not another?
- Which segments have the highest long-term value?
- Which accounts have recently changed behaviour?

This reduces the dependency on technical teams for some analytical requests. The organisation still needs consistent business definitions. Concepts such as active customer, risk or value must be clearly established.

The screenshot displays the 'Customer Insights - Data' application interface. On the left, a navigation pane includes links for Home, Customers, Data, Insights, Discovery, Segments (selected), Measures, Predictions, and Settings. The main workspace is titled 'Untitled segment' and contains a rule editor. The rule 'Rule 1' is defined with two conditions: 'Customer : CustomerInsights.LoyaltyID is not empty' and 'Customer : CustomerInsights.State is equal to WA'. Below the conditions are buttons for 'Add condition', 'Add subrule', and 'Add rule'. At the bottom of the workspace are 'Run', 'Save', and 'Cancel' buttons. On the right, a 'Copilot' panel is open, showing suggestions for natural language queries to create segments, such as 'Customers who have a loyalty ID' and 'Customers who live in WA'. The panel also includes a 'Create manually' button and a 'Refresh' button.

COPILOT IN CUSTOMER SERVICE

Within Dynamics 365 Customer Service, Copilot can help agents understand and resolve cases. It may summarise the issue, previous actions and current status. It can also prepare responses using the available context and knowledge sources. Possible capabilities include:

- Case summaries.
- Conversation summaries.
- Email response drafting.
- Knowledge search.
- Resolution notes.
- Next-step recommendations.

This reduces the time required to understand long or complex cases and improves continuity when responsibility moves between agents. Sensitive or high-impact responses should remain subject to human validation.

The screenshot displays the Dynamics 365 Customer Service workspace. The main case title is "A Mineral Build Up in Water Supply". The case details on the left include the customer "R. Claudia Serrano", priority "Normal", and status "In Progress". The central timeline shows a message from "Erica Cattaneo" dated 3/10/2023 12:45 AM, stating: "I'm very sorry to hear you are having an issue with your Breville Coffee Maker. Breville Coffee strives to deliver the best customer experience, and it makes our day to hear we have accomplished that. We want to ensure you are satisfied with your purchase and will work with you to resolve your issue as quickly as possible. I was hoping to set up a phone call with you if you are available to get a service warranty replacement going while we work to solve the issue. That way you will get a working machine no matter what in the shortest amount of time. The number we have on record is 1-800-450-7865, is this still the correct number? Please let me know if you are open to our having a conversation. We appreciate you and look forward to getting this problem solved. Thank you again, Erica Cattaneo, Customer Service Team". The right sidebar shows "Smart assist" suggestions and a list of knowledge articles related to the case.

POWER PLATFORM AND COPILOT STUDIO

Power Platform and Copilot Studio allow organisations to create their own agents and automations. Agents can interact with Dataverse, Dynamics 365 and external systems. They may consult data, execute Power Automate flows and support internal or customer-facing processes.

This flexibility is a significant advantage of the Microsoft ecosystem. It also creates a governance challenge. If several departments build agents, flows and applications independently, the environment can become difficult to manage. The organisation should define standards for:

- Ownership.
- Security.
- Naming.
- Testing.
- Documentation.
- Monitoring.
- Retirement of outdated components.

Power Platform Get started ▾ Products ▾ Guidance ▾ Troubleshooting ▾ Release plans ▾ Resources ▾

Microsoft Power Platform and Copilot Studio Architecture Center

Guidance for architecting solutions with Microsoft Power Platform and Copilot Studio using established patterns and best practices.

 **ARCHITECTURE**
[Browse reference architectures](#)

 **WHAT'S NEW**
[Learn what's new](#)

 **HOW-TO GUIDE**
[Power Platform Well-Architected](#)

Architecting workloads on Power Platform and Copilot Studio

 **Architecture key concepts**
Auditing in Dataverse
ExpressRoute and Power Platform
Distributed tracing across multiple services
[More...](#)

 **Reference architectures**
Integrate Microsoft Fabric Lakehouse data using Dataverse virtual tables
Perform predictive data analysis using Dataverse, Fabric, and Azure AI services
Secure Power Platform access to Azure resources
[More...](#)

 **Solution ideas**
Healthcare Patient Support Agent
Property rental portal with AI-driven search and payment processing
Revolutionize vehicle inspections with EVIVE
[More...](#)

WHERE DYNAMICS 365 DELIVERS THE MOST VALUE

Dynamics 365 is particularly relevant for organisations that already use Microsoft 365, Teams, Outlook, Power BI and Power Platform. Its main strengths include:

- Integration with everyday productivity tools.
- Strong connection between meetings, emails and CRM.
- Predictive sales capabilities.
- Customer data and journey tools.
- Extensibility through Power Platform.

The main difficulty lies in fragmentation across products, licences and user experiences. Companies should map the required architecture and licensing model before implementation.



AMPLEMARKET AND ARTIFICIAL INTELLIGENCE FOR PROSPECTING

Amplemarket has a different position from the other platforms analysed in this guide. It is not a complete CRM. It focuses on outbound pipeline generation, commercial research, signal identification and sequence execution.

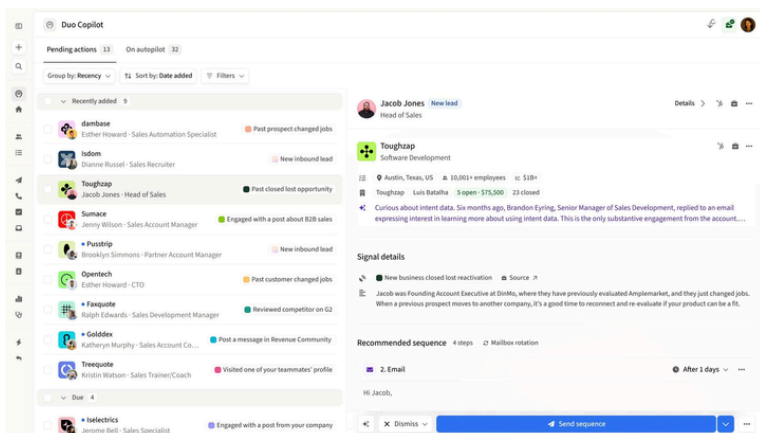
Amplemarket can integrate with a CRM such as HubSpot or Salesforce. The CRM continues to manage opportunities, customers, activities and reporting, while Amplemarket acts as a specialised prospecting and sales engagement layer. This distinction is important. Amplemarket should not be treated as a direct replacement for a complete CRM platform.

DUO COPILOT

Duo Copilot supports salespeople in identifying and contacting potential customers. It can help determine who should be approached, why the account is relevant and what message should be used. Traditionally, an SDR may need to:

- Research the company.
- Find the right contacts.
- Analyse recent news.
- Identify relevant signals.
- Understand the technology stack.
- Write the outreach message.
- Create a sequence.

Duo automates or accelerates part of this process. The quality of the output depends on the definition of the ideal customer profile. If targeting criteria are too broad, the platform may generate more prospects without improving relevance.

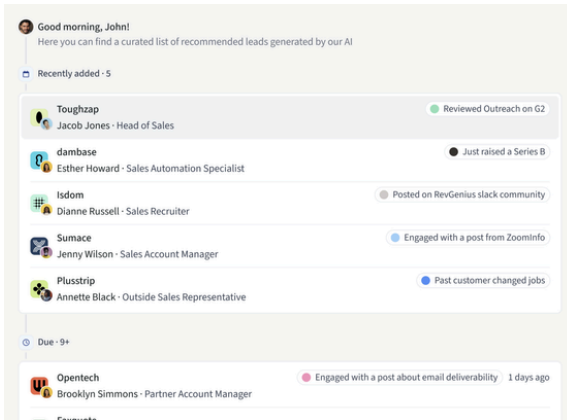


INTENT AND BUYING SIGNALS

Amplemarket uses signals to identify accounts or contacts that may be more likely to engage. Signals may include:

- Website visits.
- Job changes.
- Company news.
- Social activity.
- CRM changes.
- Previous lost opportunities.
- Product or engagement data.
- Competitive signals.

A single signal does not prove purchase intent. A website visit may be casual, and a job change may not create an immediate need. The value increases when the signal is combined with the correct account profile. For example, a priority account that has appointed a new commercial director and recently visited product pages may represent a stronger opportunity than an isolated website visit.



CONTACT-LEVEL SIGNALS

Knowing that a company is showing interest is not enough. The sales team needs to identify the relevant person. Amplemarket can associate certain signals with specific contacts.

This reduces the time required to determine who should be approached within a large organisation. The signal can then be combined with the contact's role, seniority and responsibilities to create a more relevant message.

AUTOMATED ACCOUNT AND CONTACT RESEARCH

Duo can gather information about companies and contacts. It may analyse:

- Recent news.
- Job roles.
- Company activity.
- Technologies.
- Business model.
- Competitors.
- Potential challenges.

This information supports message personalisation. Personalisation should remain relevant to the value proposition. Mentioning an unrelated personal or company detail merely to demonstrate research can make the message feel artificial. The signal or insight should create a credible reason for contact.

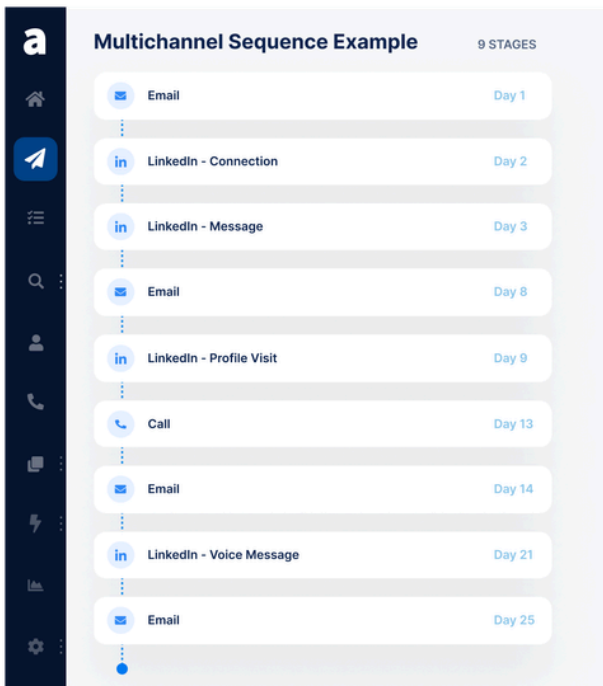
The screenshot displays the 'Searcher' interface with a sidebar of filters and a main results area. The sidebar includes sections for INTELLIGENCE (Job Change Alerts, Buying Intent Signals, Personas), PERSON (Name, Titles, Recent Job Changes, Locations, Keywords, LinkedIn Networks), and COMPANY (Current Company, Past Company, Keywords, Industries). The main area shows search results for 'People (228)' and 'Companies (176)'. Results are sorted by 'Relevancy' and include details like name, role, location, and company size. For example, Jonathan Stoller is a VP of Sales at Human Interest in the United States. Other results include Daniel Chamone, CJ Deng, Paula Lindstrom, Barry Lieberman, and Ted Ferris.

MULTICHANNEL SEQUENCES

Amplemarket can use AI to create and adapt multichannel outreach sequences. The sequence may include different steps, timing and communication formats. The AI can help adjust:

- The opening message.
- The value proposition.
- The call to action.
- The number of steps.
- The time between steps.
- The tone.
- The reference to the signal.

The salesperson can review the sequence before activation. An effective outbound strategy does not depend only on the message. It depends on the targeting, offer, timing, channel and frequency. AI should be used to increase relevance and efficiency, not simply to increase volume.



MESSAGING SETTINGS

Messaging Settings allow the organisation to define how Duo should communicate. The company can provide:

- Value propositions.
- Tone-of-voice guidance.
- Messaging by persona.
- Approved claims.
- Prohibited expressions.
- Sequence instructions.
- Examples of successful outreach.

This helps maintain consistency across different salespeople and campaigns. The quality of the instructions directly affects the quality of the generated messages.

Messaging Settings

These are the general messaging guidelines that apply to multiple Duo products.

Company value proposition Tone of voice Sequence instructions **Enforcement rules**

Enforcement rules

As an account admin, you can enforce your messaging settings on all users in your organisation. Only account admins will be able to edit enforced fields.

Available enforcement rules	
Enforce company value proposition	☒
Enforce tone of voice	☐
Enforce sequence instructions	☐

COMPETITIVE INTELLIGENCE

Competitive Intelligence allows companies to monitor competitors and identify relevant contacts or signals. This may support campaigns aimed at companies that use, evaluate or express dissatisfaction with an alternative solution. A replacement campaign needs more than a generic claim that one product is better than another. The message should explain a relevant difference, such as:

- Integration.
- Cost.
- Usability.
- Service.
- Specific functionality.
- Implementation requirements.

CRM SIGNALS

Amplemarket can use CRM information as a trigger for research or outreach. Examples include:

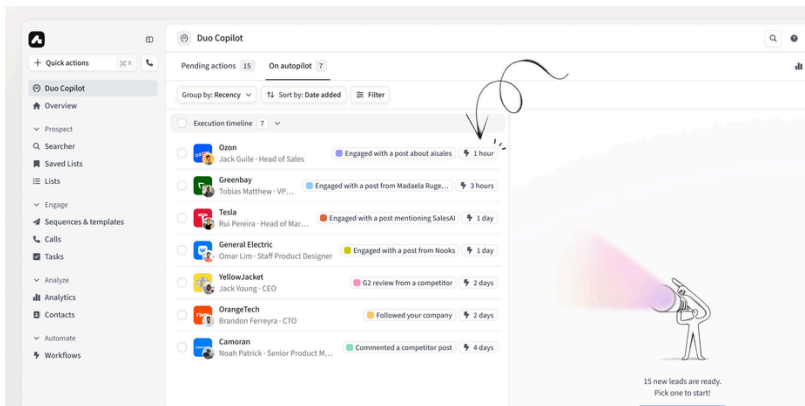
- Reopening a lost opportunity after a defined period.
- Contacting a customer approaching renewal.
- Reactivating an inactive account.
- Starting a cross-sell process.
- Responding to a change in lead score.
- Acting when an opportunity changes stage.

This transforms the CRM into a source of commercial signals rather than only a destination for new prospect data.

DUO AUTOPILOT

Duo Autopilot increases the level of autonomy. It can start research and outreach when defined conditions are met. Implementation should be gradual. A company may begin with AI-generated recommendations, followed by messages that require approval. Autonomous outreach can then be introduced for controlled segments where risk is lower and messaging has already been validated. The expansion should depend on metrics such as:

- Positive reply rate.
- Meeting rate.
- Unsubscribe rate.
- Bounce rate.
- Spam complaints.
- CRM data quality.
- Conversion to opportunity.



REPLY CLASSIFICATION AND FOLLOW-UP

AI can help classify replies and determine the appropriate next step. Replies may be categorised as:

- Positive interest.
- Objection.
- Request for information.
- Temporary absence.
- Referral to another person.
- Future interest.
- Request to stop contact.

This classification can update the CRM, pause sequences and prioritise salesperson activity. Requests to stop receiving communications must be processed immediately and consistently.

Recipient	Content	Engagement	Label	Date
Esther Howard	Really like Amazon website design Hello, I...	4 2	Interested	08:59 AM
Robert Fox	Marketing Hello, You must have been ver...	2 1	Hard no	08:53 AM
Arlene McCoy	Innovative UI at Netflix Hi Alex, I find the...	6 3	Introduction	Apr 28 · 12
Wade Warren	Amazon // Apple Hi, The product launche...	3 5	Not interested	Apr 27 · 3:4
Jenny Wilson	Amplemarket • Dropbox Hey, I was thinki...	1 4	Out of the Office	Apr 26 · 9:1
Ralph Edwards	Outbound sales managers Hello, You mus...	7 2	Asked to Circle B...	Apr 25 · 11
Darrell Steward	Collaborations at Google Hello Alexandre...	0 0	Not the Right Pe...	May 7 · 10:
Darlene Robertson	Marketing for John Doe Hey, Great stuff! L...	5 6	Forward to the R...	Apr 30 · 7:4
Evelyn Ruiz	Amplemarket • Dropbox Hey, Something...	8 1	Introduction	Apr 30 · 10

WHERE AMPELMARKET DELIVERS THE MOST VALUE

Amplemarket is particularly relevant for B2B organisations with a structured outbound strategy. Its main strengths include:

- Signal-based prospecting.
- Contact and account research.
- Personalised outreach.
- Multichannel sales engagement.
- Integration with CRM.
- Greater SDR productivity.

It does not necessarily replace the CRM. The strongest architecture often assigns a clear role to each platform. Amplemarket identifies, researches and contacts. The CRM manages the opportunity, pipeline and customer relationship.



HOW TO CHOOSE BETWEEN THE PLATFORMS

There is no universally superior platform. The correct choice depends on the organisation's processes, data, existing technology and operational priorities.

Zoho is particularly relevant for organisations that require CRM customisation, predictive models and a broad ecosystem at a controlled cost. **HubSpot** is a strong option for companies that want an integrated and relatively accessible platform across marketing, sales, service, content and data. **Salesforce** provides greater depth for enterprise organisations with complex processes, multiple data sources and advanced customisation requirements. **Dynamics 365** is especially relevant when the organisation already relies heavily on Microsoft 365, Outlook, Teams, Power BI and Power Platform. **Amplemarket** is more specialised. It is suitable when the main challenge is outbound pipeline creation, signal identification and personalised commercial outreach.

A high-level comparison can be summarised as follows:

- **Zoho:** flexibility, customisation and broad AI capabilities across CRM processes.
- **HubSpot:** ease of use, integration and AI across the full customer platform.
- **Salesforce:** enterprise depth, advanced agents and complex data environments.
- **Dynamics 365:** strong Microsoft ecosystem integration and productivity alignment.
- **Amplemarket:** specialised AI for prospecting, intent signals and outbound sales.

A company may combine platforms. HubSpot or Salesforce may operate as the central CRM, while Amplemarket supports outbound prospecting.

The architecture should avoid duplication and unclear ownership. Each platform must have a defined role, and the organisation should determine which system is the source of truth for contacts, companies, opportunities, consent and activities.

HOW TO IMPLEMENT ARTIFICIAL INTELLIGENCE IN CRM

An AI implementation should begin with a specific operational problem.

“Using AI” is not a business objective. Reducing the time required to prepare for meetings is an objective. Improving forecast accuracy is an objective. Increasing the outbound response rate is an objective.

The clearer the problem, the easier it becomes to select the right capability and measure its impact.

1. Define the Baseline – Before implementing AI, the company should measure the current situation. This may include time spent on manual tasks, current conversion rates, forecast accuracy, response times or data quality levels. Without a baseline, it is difficult to prove whether AI created real business value.

2. Prepare the Data - AI depends on reliable CRM data. The organisation should review duplicates, missing fields, inconsistent values, record associations and activity logging before deploying assistants, agents or predictive models. Poor data quality will limit the usefulness of summaries, recommendations and predictions.

3. Define the Level of Autonomy - AI should start with low-risk tasks such as summaries, drafts and recommendations. Autonomous execution should only be introduced when the data, rules and escalation paths are clear. This gradual approach reduces risk and allows teams to build confidence in the system.

4. Establish Instructions and Guardrails - Agents need clear rules on what data they can access, what actions they can execute, what topics they can discuss and when human approval is required. These guardrails protect the company from incorrect actions, inappropriate claims and inconsistent customer experiences.

5. Test Real Scenarios - Testing should include incomplete information, ambiguous requests, sensitive topics and integration failures. The goal is to understand how AI behaves when the context is not ideal, not only when the request is simple and predictable.

6. Measure Business Impact - Success should be measured by business improvement, not by AI activity. A high number of prompts, summaries or automated actions does not prove value. The relevant question is whether AI saved time, improved conversion, increased forecast accuracy, enhanced customer experience or reduced administrative effort.

RISKS AND LIMITATIONS

Artificial intelligence can create significant value, but it also introduces new risks.

The first is incorrect information. A well-written answer may still contain false or unsupported statements.

The second is the automation of poor processes. If a workflow contains unnecessary steps or contradictory rules, AI will execute the problem more quickly.

The third is lack of context. Information stored in personal inboxes, spreadsheets or external applications may not be available to the CRM or agent.

The fourth is excessive autonomy. Agents should not make legal, financial or contractual commitments without appropriate controls.

The fifth is cost. AI features may depend on credits, additional licences, model consumption or data processing.

The sixth is adoption. A capability creates no value when teams do not use it, do not trust it or do not understand how to interpret the result.

The main risks companies should monitor are:

- Hallucinations and factual errors.
- Unauthorised access to data.
- Incorrect automated actions.
- Outdated knowledge sources.
- Biased predictions.
- Unexpected consumption costs.
- Low user adoption.
- Poor integration with existing processes.

Risk management should be part of the implementation from the beginning rather than added after deployment.



CONCLUSION

Artificial intelligence is transforming CRM from a system of record into a system of interpretation, recommendation and execution.

Zoho applies Zia to CRM configuration, forecasting, communication analysis and recommended actions. HubSpot uses Breeze to connect artificial intelligence with marketing, sales, content, service and data. Salesforce combines Einstein, Agentforce and Data Cloud to support complex enterprise operations. Dynamics 365 integrates Copilot, agents and customer data across the Microsoft ecosystem. Amplemarket applies artificial intelligence to signal identification, commercial research and outbound pipeline generation. None of these platforms removes the need for strategy, process definition and governance. Artificial intelligence can reduce administrative work, improve decision-making and increase team capacity. It cannot compensate for disorganised data, weak value propositions or unclear processes.

The objective should not be to automate everything. The objective should be to identify where technology can eliminate low-value work, improve the quality of decisions and allow people to focus on tasks that require judgement, creativity and human relationships.

START WITH LIMINAL





THE IMPORTANCE OF MARTECH CONSULTANTS

The speed at which Gen AI is evolving makes it nearly impossible for internal teams to keep up with all the trends, evaluate tools, and integrate technologies without expert support. This is where MarTech consultants — like Liminal — make a difference.

The role of the consultant is not only technical. More than mastering tools, it is necessary to understand the business, teams, objectives and existing work processes. This is the only way to ensure that the adoption of Gen AI no longer creates a technological silo, but rather a real lever of value.

In practice, consultants help to:

- Diagnose the company's degree of digital maturity and its readiness for Gen AI;
- Identify the use cases with the greatest potential impact and least implementation complexity;
- Select the most appropriate tools for the context and budget of the organization; Integrate these tools with existing systems (CRM, automation, BI, eCommerce, etc.);
- Train teams and establish adoption and continuous improvement processes.

Most importantly, the consultant offers an unbiased and strategic view, free from commercial software pressures, and focused on the results the client wants to achieve.



ABOUT LIMINAL

As specialists in martech (Marketing Technologies), Liminal has been able to improve marketing results and sales of several companies, ensuring the conditions for the success of marketing automation programs.

With Liminal, you will have access to experts who will analyze, design and implement marketing and sales strategies and operations, supported by technological systems, such as Automation of Marketing, which guarantee the growth of your business. Schedule a free diagnosis with a Liminal specialist now.



Strategy & Design

Diagnosis of your company's digital maturity and marketing and sales performance, to design a strategy for growth and transformation, involving people, processes, and technologies.



Roll-Out

We customize low-code/no-code software for Artificial Intelligence, CRM, Automation and Analytics, to support strategies, operations, repeatable and scalable Sales Outreach, Go-to-Market, Nurturing processes and RevOps.



Continuous Improvement

Monitoring, optimization and continuous improvement of processes and systems, ensuring that MarTech actively contributes to business growth and success.

LET'S TALK



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WHERE
MARTECH
MEETS BUSINESS