



**NUCLEUS**  
RESEARCH

# THE EXPECTED IMPACT OF GENERATIVE AI IN CRM

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## THE BOTTOM LINE

In early March of 2023, several leading CRM vendors including Salesforce, Microsoft, and HubSpot announced new generative AI capabilities fine-tuned on public and private organizational data to help users eliminate mundane tasks and deliver elevated customer experiences. Nucleus interviewed sales, service, and marketing professionals from a variety of industries to identify the capabilities enabled by generative AI that will most impact their day-to-day tasks. Based on these conversations, Nucleus expects service agents and marketers to benefit most from the new technology, as purpose-built generative AI is expected to improve productivity by 10 to 35 percent.

## OVERVIEW

In March of 2023, many well-known CRM vendors including Salesforce, Microsoft, and HubSpot announced the integration large language models (LLMs) into their CRM offerings. Salesforce Einstein, Microsoft Copilot, and HubSpot's ChatSpot.ai are tools that will enable users across CX to produce content tailored to each individual customer more efficiently. Unlike public LLMs like ChatGPT, these tools are purpose-built through fine-tuning on public and private organizational data. By incorporating private data, users will be able to automatically generate content that can include customer specific information. Nucleus expects generative AI specialized for CRM to help organizations elevate customer experiences and improve the productivity of users.

## EXPECTED USER IMPACT

Nucleus interviewed sales, service, and marketing professionals from a variety of industries to better understand, from their perspective, how generative AI capabilities will impact their day-to-day tasks.

### SALES

Sales-specific generative AI offers several potential benefits to sales professionals including increased productivity and the ability to draft more personalized prospect outreach. By automating repetitive tasks such as data entry and email drafting, sales professionals can focus on higher-value activities such as building relationships with clients. Additionally, LLMs can analyze customer data to automatically create personalized sales pitches, increasing the likelihood of engaging and converting prospects. However, upon talking with sales professionals, several noted that imbedding generative AI capabilities into CRM would be a "nice to have" capability, but the impact of the technology in their daily work activities would be minimal.

**Service agents are expected to decrease response times by 10% to 30% with generative AI**

### SERVICE

The most notable expected impact of generative AI for service agents will be the users ability to reduce customer response times by automatically generating responses to not only frequently asked questions or simple requests, but also more advanced customer queries.

This will enable customer service agents to focus on more complex or pertinent issues. Generative AI within CRM will be able to analyze an organization's private customer data and preferences to help agents tailor interactions and solutions to the specific needs of each customer. This personalization is expected to help organizations provide elevated experiences for customers. In addition, LLMs can handle multiple customer interactions simultaneously, reducing the workload for customer service agents and allowing them to focus on tasks that require human intervention and empathy. Also, these systems can provide consistent, accurate, and unbiased responses to customers, ensuring a high level of quality in every interaction. Generative AI also enhances agent support by suggesting relevant information, solutions, or responses in real-time, empowering agents to better address customer concerns. Since LLMs can be fine-tuned by streaming feedback, the performance of the model is refined over time, ultimately leading to better customer service experiences.

## MARKETING

The most common use case of generative AI piquing the interest of interviewed marketers is the potential to add additional automations to creating marketing campaigns and strategies. LLM generated content will enables marketers to develop personalized and targeted messages based on customer data stored within the organization's CRM, leading to improved audience engagement and conversion rates. In addition, by analyzing vast amounts of customer data, purpose-built generative AI can create content that touches on hidden trends and insights, helping marketers to make more informed decisions about their campaigns. Another key element of generative marketing tools that marketers cited was the ability to automate repetitive tasks such as social media posting or email marketing. By offloading menial tasks, marketing professionals will have more time to focus on the creative and strategic aspects of their work.

**Nucleus expects  
generative AI to  
accelerate campaign  
creation by up to 35%**

## LOOKING AHEAD

Looking ahead to the next 12 months, Nucleus expects CRM-specific generative AI to have the potential to transform the way professionals engage with customers, automate repetitive tasks, and uncover valuable insights. As these generative AI capabilities become more refined and trained on an organization's private data, organizations leveraging the technology are expected to achieve significant employee productivity gains, particularly for

service agents and marketers. Organizations across all industries are poised to benefit from these advancements as they adapt to ever-evolving customer expectations and strive to deliver elevated experiences that differentiate them in the marketplace.