

Client Brief #8

Company



Summary

Enxoo is a Salesforce implementation partner helping organisations transform their customer relationship management. With clients increasingly curious but cautious about AI, Enxoo wants you to propose how an AI assistant could add value to routine CRM processes, specifically in customer relationship tracking. You should identify a process that could be improved or automated, explain the benefits, outline at least five guardrails to ensure safe and effective use, and suggest how Enxoo could showcase the value of this AI solution to clients.

Industry

Technology, CRM, Digital Transformation, Artificial Intelligence, Professional Services

Focus

This brief relates to CRM and digital transformation, with a focus on demonstrating practical, safe, and innovative uses of AI for customer relationship management.

Key Words

AI Assistants, CRM, Customer Relationship Management, Salesforce, Agentforce, Digital Transformation, Automation, Data Privacy, GDPR, Client Engagement, Business Efficiency

Brief

Hi – I'm Sarah Davies, Head of Recruitment at Enxoo, and I'd like to introduce you to our challenge.

At Enxoo, we're a Salesforce implementation partner based in Liverpool. Our team helps organisations digitally transform by optimising workflows, reducing waste, and creating better customer experiences. We work with a wide range of clients, from broadband providers to microbiology labs, all united by a need to manage their customer relationships more effectively.

Increasingly, clients are asking us about Artificial Intelligence. Salesforce recently launched Agentforce, their AI assistant platform, and while it's a powerful tool, many businesses remain cautious about how to use AI safely and effectively in their daily operations.

That's where you come in. We'd like you to step into the role of consultant and think about how an AI assistant could add real value in a Customer Relationship Management (CRM) system. You don't need to be a Salesforce expert – just think about the everyday processes businesses use to track relationships with their clients.

We'd like you to:

Identify a routine customer relationship tracking process (like logging client interactions, following up on leads, scheduling meetings, or recording customer feedback) that could be improved or automated by AI.

Explain why you've chosen this process and what benefits it would bring to staff, clients, or both.

Suggest at least five guardrails or rules the AI should follow to ensure it works effectively and responsibly – things like respecting data privacy, escalating complex queries to humans, or maintaining GDPR compliance.

And finally, suggest how Enxoo could showcase this use of AI to clients in a way that's clear, engaging, and builds confidence in adopting the technology.

For us, the right solution will not only improve efficiency, but also demonstrate to our clients the potential of AI in transforming how they manage relationships with their customers.

We're excited to see your ideas – and how you think AI can turn a routine process into something smarter, faster, and more valuable!