



## **Harnessing AI in Account Engagement: Real-World Applications for Maximum ROI**

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# About this session...



Provide me 10 session ideas for MarDreamin!



Certainly! Here are 10 session titles for MarDreamin, a marketing automation and Salesforce event:



1. "Demystifying Marketing Automation: Strategies for the Modern Business"
2. "The Evolution of CRM: How Salesforce is Redefining Customer Relationships"
3. "Maximizing Lead Conversion: Proven Tactics for Effective Nurturing"
4. "Harnessing AI in Account Engagement: Real-World Applications for Maximum ROI"
5. "Omni-channel Marketing: Bridging the Gap Between Online and Offline Touchpoints"
6. "Data-driven Decisions: Using Salesforce Analytics to Drive Growth"
7. "Creating Seamless Customer Journeys: Best Practices in Automation Workflows"
8. "Beyond Email: Leveraging SMS, Chatbots, and More in Your Automation Strategy"
9. "The Future of Marketing Automation: Trends to Watch in the Next Decade"
10. "Salesforce Integration Mastery: Tools and Tips for a Unified Marketing Ecosystem"

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Provide me a session abstract for number 4



See the extraordinary power of AI when paired with Account Engagement. Reviewing live examples and case studies, you'll see firsthand how AI is reshaping marketing strategies and boosting ROI.



To make it even more exciting, this session includes an interactive demo. You'll have the opportunity to engage directly with AI-powered Account Engagement processes and gain a practical understanding of how to apply these features in your marketing efforts.

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## Harnessing AI in Account Engagement: Real-World Applications for Maximum ROI

Date **November 2, 2023**

Time **2:30 – 3:00 PM ET**

Skill Level  Beginner

Learning Track **Account Engagement**

### Overview

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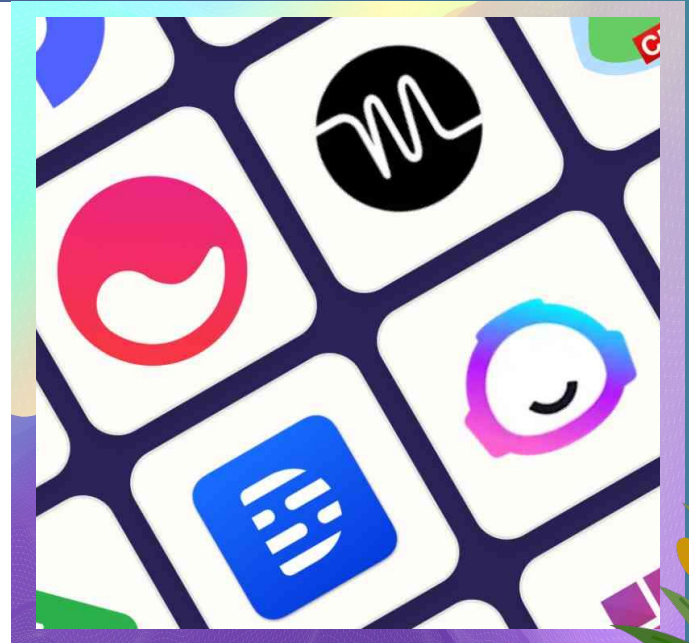
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# What is AI?

## What is AI?

AI, or Artificial Intelligence, is the ability of machines (like computers) to perform tasks that typically require human intelligence.

This includes problem solving, understanding natural language, recognizing patterns, and making decisions.



# THE VALUE OF AI

- **Efficiency and Speed.** AI can process vast amounts of data much faster than humans. This makes tasks like data analysis, research, and certain calculations incredibly efficient.
- **Availability.** Machines don't need to rest. An AI system can be available 24/7, making it useful for continuous tasks or services.
- **Reliability.** Once programmed correctly, AI can perform repetitive tasks without making mistakes, ensuring consistency..
- **Data Handling.** AI can analyze huge datasets that would be impossible for humans to sift through, uncovering patterns and insights that can be beneficial for various industries.
- **Personalization.** AI can adapt to individual user needs and provide personalized recommendations or solutions, enhancing user experience.
- **Cost Reduction:** In the long run, AI can reduce costs by automating tasks that would require multiple humans, especially in areas like customer service, data entry, or even manufacturing.

# Real-World Use Case



## The Problem

- LinkedIn Lead Gen Forms do not allow for picklists
- With open text fields users can type in anything...
- State and Country Values are critical to lead routing
- 60% Form submissions were incorrect.
  - Incorrect Values: Texass, TX, 75007, TEX, United States.
  - Correct Value: Texas
- **Manual Review (1-2 Week Processing)**
- Values from 'State' 'Country' were passed to ChatGPT
- **Prompt: Take the following value and convert it to a Full State or Country Value. For unknown values, populate 'Unknown'**
  - **Output: Texas**
- We went from a 60% incorrect values to a 97% correct values.
- **Time from submission to sales: 2 Seconds.**
- Close rates increased by 30%.

# Other Ideas



**Email / Nurture Copy:** Crafting tailored content for emails or nurture campaigns to engage and guide potential clients through the sales funnel effectively.

**Proofreading / Copy editing:** Ensuring content is free from grammatical, punctuation, or spelling errors, while also checking for clarity, coherence, and consistency in style.

**Data Correction:** Identifying and rectifying inaccuracies or inconsistencies in datasets to maintain data integrity and reliability.

**Code Creation / Editing: JS, HTML, CSS:** Writing or refining web-based scripts and structures, using JavaScript, HyperText Markup Language, and Cascading Style Sheets to enhance website functionality and design.

**Ideation:** Brainstorming and generating creative concepts or strategies for campaigns, content, or other marketing initiatives.

**Calendar / Planning:** Organizing and scheduling marketing activities, campaigns, or tasks to ensure timely execution and optimal resource allocation.

**Scoring / Grading Model Creation:** Developing algorithms or criteria to evaluate and rank leads or customers based on their potential value or fit for a business.

**Personalization:** Tailoring content, offers, or user experiences based on individual preferences, behaviors, or historical data to enhance engagement and relevance.



# Live Demo



# Auto Reply Handling

## Option 1

### Out of Office - Please include:

1. First Name
2. Last Name
3. Email
4. Return Date
5. Emergency Contact

“ Hi, my name is Stephen Stouffer - [Stephen@saascend.com](mailto:Stephen@saascend.com). I'll be OOO until next Tuesday! Please contact [marketing@saascend.com](mailto:marketing@saascend.com) for help! ”

## Option 2

### Unsubscribe Request

1. Email address

“Please remove me from your mailing list: [stephen@saascend.com](mailto:stephen@saascend.com)”

## Option 3

### No longer with company

1. First Name
2. Last Name
3. Replacement Contact information

“You've reached Stephen Stouffer, I'm not longer with the company, please contact [jane@saascend.com](mailto:jane@saascend.com) for support. “



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**Questions?**