

Use-Case Prism: Generative AI for CRM

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Initiatives: [CRM Strategy and Customer Experience](#)

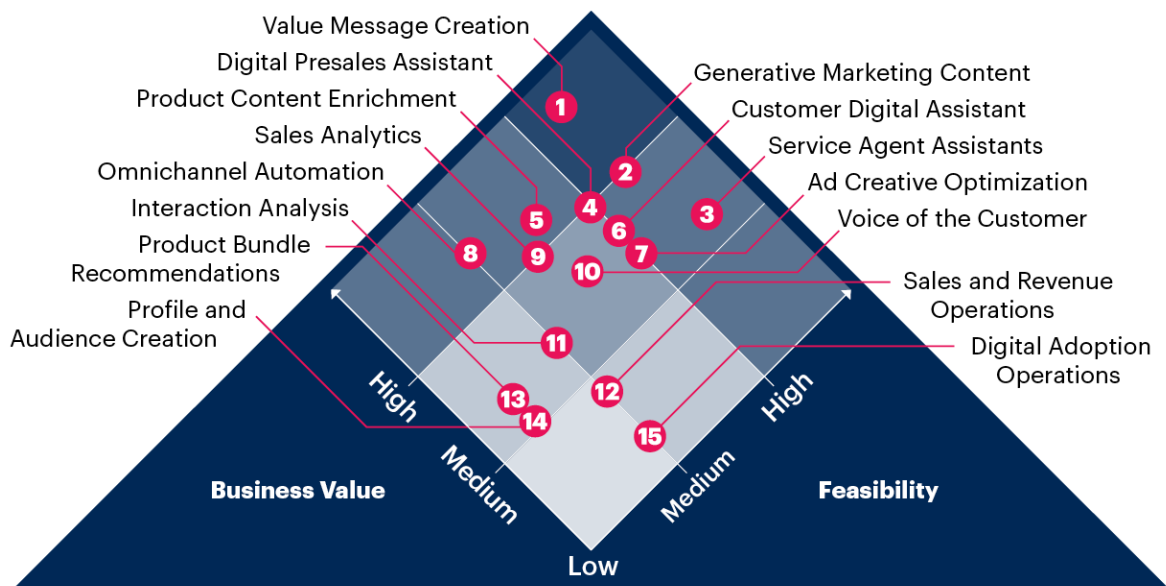
In this research, Gartner experts identify 15 top enterprise GenAI use cases for CRM solutions. Application leaders responsible for CRM strategy should use this research to target the AI investments that deliver the highest business value and are most feasible for their organizations to undertake.

Overview

Generative AI (GenAI) is an enabler of specific use cases that are now embedded in CRM solutions and across CRM technologies targeting marketers, sales teams, customer service agents, digital commerce teams and other users, such as customer experience (CX) teams. This Use-Case Prism ranks 15 use cases (see Figure 1) against business value and feasibility axes, inviting strategic conversations and driving investment decisions related to specific solutions.

Figure 1: Generative AI Use-Case Prism for CRM

Generative AI Use-Case Prism for CRM



Source: Gartner
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How to Use

Review the GenAI-enabled use cases plotted on the Prism, comparing them with the maturity and requirements of your own CRM technologies and future strategy. To assist with this task, we have a presentation summary of this research and a Toolkit.

Presentation

Download a summary presentation of this research here:

Use-Case Prism: Generative AI for CRM

Toolkit

The companion Toolkit allows you to tailor the Use-Case Prism for your organization's needs. Navigate to the Toolkit (see [Toolkit: Discover and Prioritize Your Best AI Use Cases With a Gartner Prism](#)) and download the Excel file to customize the use cases, business value and feasibility dimensions, relative weightings, and use-case scores.

Scoring Breakdown

Figure 2 shows how each use case was scored against each business value and feasibility dimension. See Table 1 just below it for explanations of each dimension.

Figure 2: Generative AI Use-Case Scorecard for CRM

Generative AI Use-Case Scorecard for CRM

		Business Value			Feasibility	
		Revenue Growth	Operational Efficiency	Customer Service Quality	Technical Feasibility	Organizational Feasibility
○ None ● Low ● Medium ● High ● Very High						
1	Value Message Creation	●	●	●	●	●
2	Generative Marketing Content	●	●	●	●	●
3	Service Agent Assistants	●	●	●	●	●
4	Digital Presales Assistant	●	●	●	●	●
5	Product Content Enrichment	●	●	●	●	●
6	Customer Digital Assistant	●	●	●	●	●
7	Ad Creative Optimization	●	●	●	●	●
8	Omnichannel Automation	●	●	●	●	●
9	Sales Analytics	●	●	●	●	●
10	Voice of the Customer	●	●	●	●	●
11	Interaction Analysis	●	●	●	●	●
12	Sales and Revenue Operations	●	●	●	●	●
13	Product Bundle Recommendations	●	●	●	●	●
14	Profile and Audience Creation	●	●	●	●	●
15	Digital Adoption Operations	●	●	●	●	●

Source: Gartner
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Table 1: Use-Case Dimension Explanations

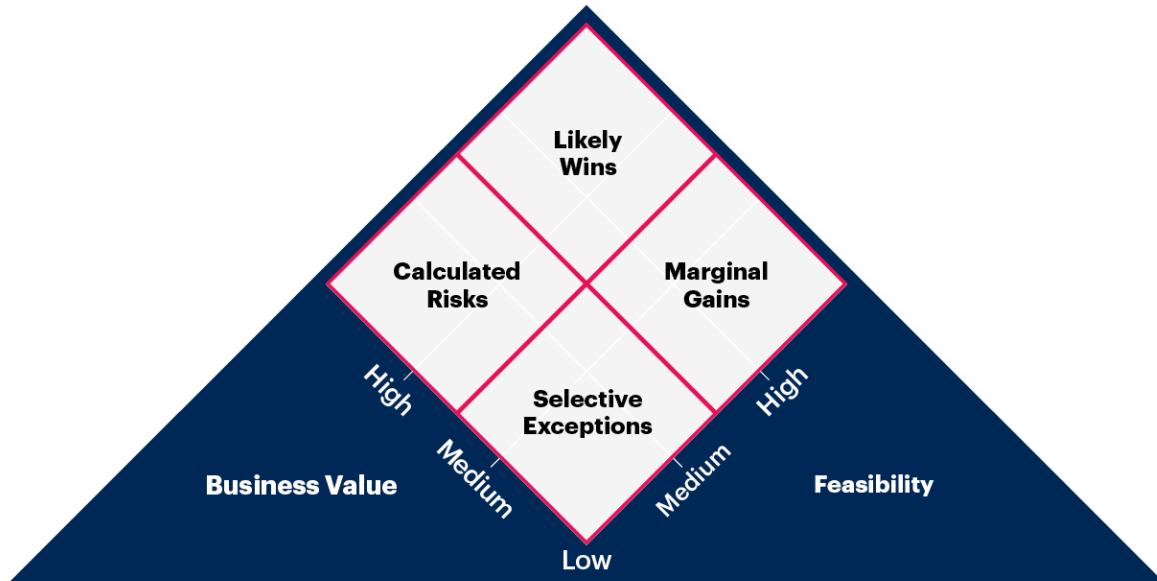
Dimension	Explanation
Revenue Growth	The ability of the use case to support existing and new business opportunities through the sale of products and services that drive top-line growth.
Operational Efficiency	The ability to meet or exceed performance goals with equal or fewer resources such as capital investments, staff, technology or time duration.
Customer Service Quality	The ability to improve the satisfaction of customers through processes, UX and product changes that support customer relationship management (such as handled by marketers, sellers, customer service agents, etc.) and face-to-face interactions.
Technical Feasibility	The availability of technology solutions and infrastructure to support the building and deploying of AI solutions at scale.
Organizational Feasibility	The ability and openness of the organization to use and incorporate AI technology and insights into its decision making. This includes how ready the organization is to rely on AI to augment or automate decision making.

Source: Gartner (November 2023)

Scoring Breakdown by Category

Figure 3 shows the Prism overlaid with the four categories we've split the use cases into. The sections that follow summarize the rationale for each use-case score.

Figure 3: Generative AI Use-Case Prism for CRM

Generative AI Use-Case Prism for CRM

Source: Gartner
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Use-Case Prism Categories

Each use case is placed into one of four categories based on its position on the Prism. Click on the category name to jump to a section summarizing the rationale for each use-case score in that category:

- **Likely Wins:** Use cases at the top of the Prism combine high feasibility and high business value, making them wins in most circumstances.
- **Calculated Risks:** Use cases on the left side of the Prism offer high business value but low feasibility, meaning they represent riskier options.
- **Marginal Gains:** Use cases on the right side of the Prism are highly feasible but offer low business value, making them low-risk but for marginal gain.
- **Selective Exceptions:** Use cases at the bottom of the Prism offer low business value and low feasibility, making them lower priority except in select circumstances.

Likely Wins

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Use cases at the top of the Prism combine high feasibility and high business value, making them wins in most circumstances.

Table 2: Scoring Breakdown: High-Value, High-Feasibility Use Cases

Use Case	Business Value	Feasibility
1. Value Message Creation <i>Ideation and creation of value-messaging narratives tailored for each buying team using customer intelligence. Draft prospecting outreach, outline meeting agendas and talking points for documents, or compose RFP response text.</i>	Automated creation of text content allows sellers to focus on higher-value activity, increasing employee performance and lifting employee and customer experience. GenAI and machine learning apply outreach best practices to increase response rates, leading to higher revenues. Customers may benefit by getting more relevant messages that help their buyer journey. However, the ease with which messages can be created can cause a massive increase in pointless communications, causing frustration.	Personalized message outreach and customer content creation applications are the most adopted of sales GenAI developments. Handling replies and building quotes are likely to gain currency. All application vendors need skilled prompt and augmented retrieval orchestration to build the quality and integrity of messages at scale. Siloed go-to-market teams must combine into revenue alliances to ensure consistency of brand messages and positioning.
2. Generative Marketing Content <i>Tailoring content variants for experimentation or personalization and localization. Iterate/update campaign briefs using the underlying audience data. Generate campaign/journey assets such as templates, landing pages and survey forms.</i>	Increased productivity, variety and velocity of content creation can improve customer engagement and response. GenAI can support market growth, entry into new markets and significant cost savings over manual processes and services.	Content marketing is leveraging GenAI for its ability to automate creation and generate effective content. GenAI uses algorithms to learn from existing data and generate new content based on that learning.
3. Digital Presales Assistant	Improving buyers' product discovery drives higher shopper completion rates, better satisfaction through reduction in regret purchases and lower returns, which all lower operational costs.	Many technology vendors have embedded GenAI capabilities into their solutions; however, be aware that GenAI requires integration with existing AI and digital commerce technologies. Organizations must develop best practice

<i>Enhance self-service journeys by summarizing product information into “how to” guides and recommendations, resolving queries, personalizing interactions, and easing product discovery.</i>	use of first- and third-party data to augment prompts to produce relevant and reliable results. Results may depend upon the organization’s ability to create collaborative teams to capitalize on GenAI outputs that can be built into customer-facing tools. Operational costs from high transaction quantities can reduce feasibility.

Source: Gartner (November 2023)

Calculated Risks

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Use cases on the left side of the Prism offer high business value but low feasibility, meaning they represent riskier options.

Table 3: Scoring Breakdown: High-Value, Low-Feasibility Use Cases

Use Case	Business Value	Feasibility
9. Sales Analytics <i>Enables synthesis and analysis of wide, large rich sources and signals offering predictive and prescriptive guidance. Natural language and visual interfaces deliver sales users self-service insight in the format desired.</i>	Enabling sales users with analytics output in a chosen format derived from richer data sources offers comprehension of customer intent and behavior, sales trends, forecasts, and sales team performance. For sellers, actionable insights tailored to each account lead to more relevant buyer engagement. For managers and leaders, analysis of large volumes of data signals creates better visibility and predictability.	Many sales tech vendors are releasing revenue intelligence functionality powered by GenAI with natural language processing (NLP) interfaces and automated workflows. Integrating data sources (mainly in front/back office and end-to-end revenue acquisition) requires better organizational collaboration than technical feasibility. Careful vendor inspection is necessary to ensure that AI functionality can access and use the desired data and signals while meeting data privacy and regulatory requirements. Technical debt in enterprise apps may complicate time to benefit realization.
8. Omnichannel Automation <i>GenAI identifies, recommends and requests permission to test new journeys, and optimize and schedule existing ones.</i>	Scaling robust experimentation of journeys to find the most effective journeys delivers productivity benefits beyond human capability. Improved journeys lift commercial outcomes and strengthen customer loyalty.	While feasible, it takes a lot of effort to equip the tools that work with CRM (MAP, PE, MMH, DXP, CMS) with a sufficient set of journeys for their embedded AI capabilities to start to be of value. Humans then need to pivot from creating journeys to guiding the systems and managing its recommendations.
10. Voice of the Customer	Mining customer feedback and first-party data, product analytics, and public sources, and synthesizing insights	Making data sources available and ensuring the protection of enterprise IP and personal data are primary complications to

<i>Through conversational Q&A, extract insights from multiple data sources and automate these insights into the customer journey at the right time and with the right content.</i>	accelerates the time to market of products and services, enhances fine-tuning, and improves outcomes for the enterprise and customer. The buyer journey across CRM domains becomes seamless through automated workflow improvements.	the access and usage of data points in VoC cases. However, without the data, the insight risks hallucination and inaccuracy. Masking personal data and retrieval augmented prompting are key risk defenses available in a number of application settings.
5. Product Content Enrichment <i>Create, update and standardize accurate product descriptions, tailored to markets, segments, or channels, or tuned for compliance, SEO and brand.</i>	Creating, optimizing and localizing a large volume of assets can be executed at reduced cost, supporting rapid deployment. Personalization increases customer engagement and satisfaction, both of which elevate revenue. Localization enables broader market penetration at lower cost. The workflow of planning ideation, design and deployment can be streamlined, reducing costs and time to market.	Application functionality for creating and managing multiple text content types and user interfaces is widely available. Organizations need to train models with company-specific data (e.g., their own catalog data) to align output to brand tone and positioning, and to detect hidden bias, plagiarism, and hallucinations. Organizations may struggle with approval and review bottlenecks arising from large volumes of content output.

Source: Gartner (November 2023)

Marginal Gains

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Use cases on the right side of the Prism are highly feasible but offer low business value, making them low risk but for marginal gain.

Table 4: Scoring Breakdown: Low-Value, High-Feasibility Use Cases

Use Case	Business Value	Feasibility
3. Customer Digital Assistant <i>Customer digital assistants are conversational interfaces using natural language processing and prediction models to assist people or automate tasks. They deliver autonomously, generating responses and answers for complex issues.</i>	Elevating the chatbot experience to the human-centric, multiturn conversation with virtual agents supports customers with fast resolution to a higher quantity of their inquiries. It helps to minimize customer frustration with cumbersome canned response templates. It enables seamless transfer to customer service agents with advanced triage information. Reducing agent call-handling volumes helps balance resources and reduce costs while serving customers effectively to protect and grow revenues.	While applications are entering the market fast for this use case, organizations must practice their due diligence in refining the customer's journey to prevent unwanted customer issues and reputation impact. Organizational and program readiness to support digital assistants can be a challenge, often requiring a variety of systems, workflows and datasets to ensure secure and accurate output of knowledge and information to the end customer.
7. Ad Creative Optimization <i>Dynamically fine-tune and swap creative content (messages, offers, calls to action, images, audio and videos) for use in advertising and media messaging relying on platform or walled garden data.</i>	Optimizing both media and creative improves advertising efficiency and effectiveness, directly supporting cost-efficiency and generating revenue and brand awareness.	Using GenAI to increase the power and personalization abilities of existing dynamic content optimization enhances feasibility. The privacy challenges to ad targeting and measurement are substantial and require widespread adoption of new market-level architecture to address.
6. Service Agent Assistants	Enterprises can improve the efficiency of average call handle time and first call resolution, as well as automate tedious and repetitive tasks, reducing manual effort. Equally, customers see increased	Workflow automation assistance has become widely available, The service market has been a leader in AI usage now positively compounded with GenAI capability. Usage is expected to become

<i>Agent assistant tools use interaction content to create messages, and surface knowledge and next best actions for personalized resolutions. They automate the after-call work of transcribing, summarizing and minimizing data entry.</i>	speed, quality and accuracy of resolution as agents have real-time access to a deeper knowledge of the content. Supporting enhanced employee and customer experience drives retention rates and reduces costs of business acquisition and staff turnover.	ubiquitous as cost-effectiveness is proven. Organizations must develop their employee experience and perceptions of technology undermining human involvement.

Source: Gartner (November 2023)

Selective Exceptions

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Use cases at the bottom of the Prism offer low business value and low feasibility, making them lower priority except in select circumstances.

Table 5: Scoring Breakdown: Low-Value, Low-Feasibility Use Cases

Use Case	Business Value	Feasibility
11. Interaction Analysis <i>Analyze at scale agent interactions, customer queries, reviews and outcomes to provide insights into contact drivers and suggest modifications to processes, service workflows and/or product issues.</i>	<p>Interpreting large volumes of unstructured data quickly uncovers opportunities to improve processes and product quality for cost savings and efficiency gains, and serves customers. Autonomously and through conversational interfaces, organizations can detect critical issues that contribute to service calls and product issues, surfacing root causes and driving accurate resolutions.</p>	<p>enterprise-level collaboration around customer data, knowledge management systems, and CRM/CSS platforms. This data fragmentation may mean organizations struggle to capitalize on GenAI-driven opportunities or acquire additional technology solutions to augment lacking capabilities. Governance of data quality inputs is needed to trust output and prevent unwanted GenAI side effects.</p>
13. Product Bundle Recommendation <i>Synthesize trends and recommendations from mass data on customer transactions, behavior and reviews to plan product bundles and promotions.</i>	<p>GenAI can derive customer behavior, choice and experience insights at lower costs. This increases the speed and precision of insights and recommendations. Meeting customer demand grants a competitive advantage that supports revenue growth and satisfied, loyal customers.</p>	<p>Organizing siloed applications, data sources and operations between and within the front and back office may limit the full benefits of enterprise collaboration. However, digital commerce teams must get started to avoid being overtaken by competitors. Vendors in commerce application markets offer GenAI capabilities to support organizations that are planning integration but need to act quickly.</p>
12. Sales and Revenue Operations	<p>Operational efficiency gains will be a primary benefit as GenAI can collaborate on process redesign, workflow automation and data governance. The effectiveness of operations</p>	<p>Revenue technology vendors are promoting GenAI capabilities designed to augment the creation of workflows, automation, and apps in no-code or low-code environments. GenAI</p>

Accelerate data management, process mining and transformation, technology design and administration. Examples include automating data preparation management tasks, sales workflow automation and business logic builder.

will indirectly drive sellers' impact on revenue retention, growth and customer loyalty.

offerings provide sales operations leaders and system administrators with a previously unheard of potential to increase their output and decrease their time to delivery without adding additional resources to their teams.

14. Profile and Audience Creation

GenAI for (CDP) enables the creation of targeted customer audiences, profiles, personas and segments at speed and scale across billions of first-party data points. CDPs interact in a human-like dialogue, maximizing user adoption.

Reduces the burden for GTM teams in assembling refined audience segments and accelerates putting processes into action for strategy, planning and measurement. Together with the reallocation of skills, it increases the ability to adapt go-to-market tactics to maximize the cost-effectiveness of acquisition.

Simplifying customer data analysis by end users was the primary GenAI benefit in Gartner's Marketing Technology Survey. ¹ Hyperscale and specialist vendors are already showing this capability. Prompt-based segmentation will quickly supersede traditional approaches. Organizations with fragmented processes and data may struggle to gain an integrated customer view and realize these benefits.

15. Digital Adoption Operations

Content generation for digital adoption platforms is developed at scale, sourcing and synthesizing knowledge, delivering multimedia outputs, and automating the publishing workflow for the digital adoption teams.

Organizations can make decisions and interventions with greater lower costs and return on investment due to enhanced data integrity and more resource-efficient production processes. Higher user interaction and adoption can increase consumption and customer satisfaction.

Content creation and knowledge management GenAI applications are widely available, if not yet fully baked into digital adoption platforms. Integrating GenAI into applications to embed the functions desired requires wider trust in large language models (LLMs) management. Governance of outputs, particularly to external users, requires human oversight, which requires resources, collaboration and training.



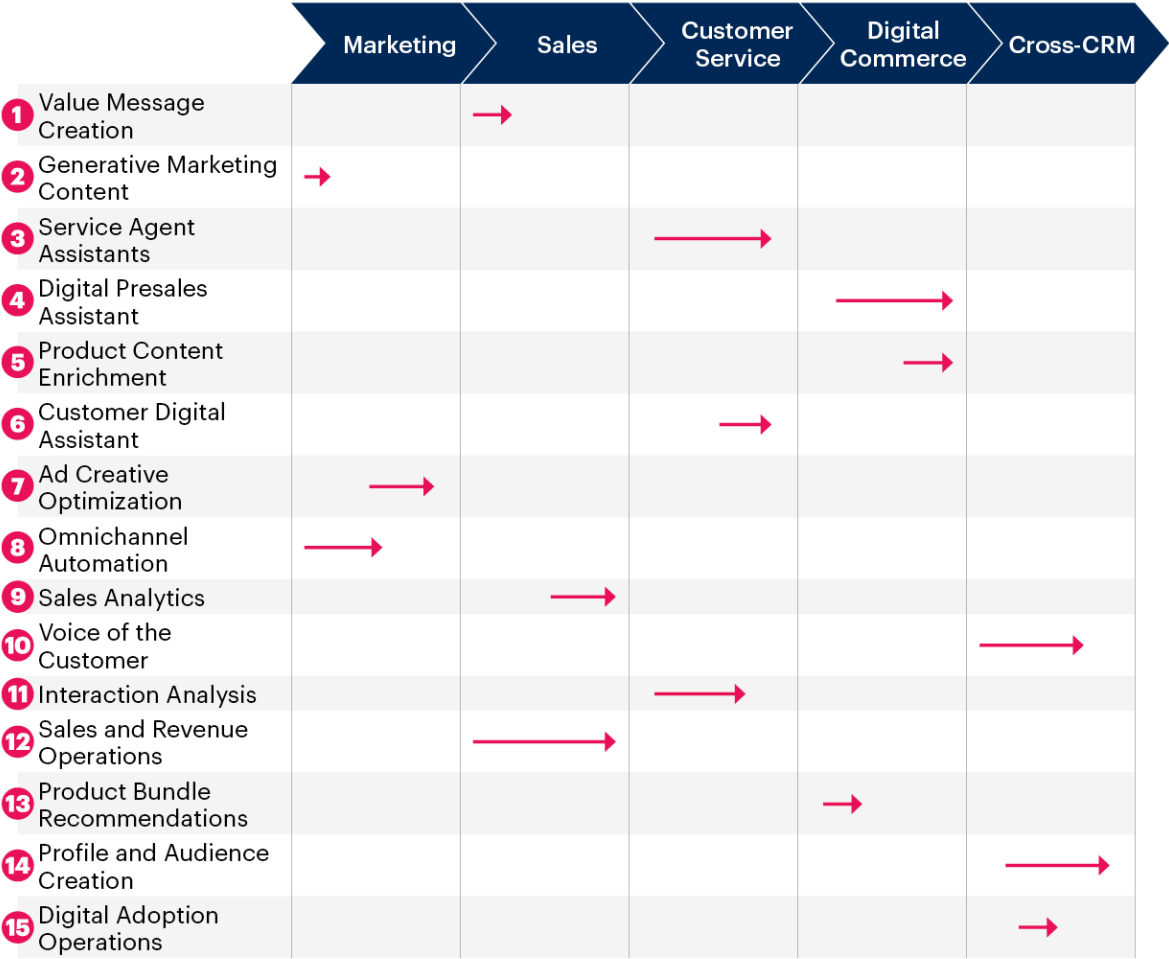
Source: Gartner (November 2023)

Pipeline

The pipeline shows how these 15 use cases are distributed across relevant business functions (see Figure 4). It allows prioritization, as you can easily see which use cases have a chance of improving marketing, sales, digital commerce, customer service, and cross-CRM. Typically, use cases that have a longer span across the pipeline should have better total business value. Finally, the pipeline serves as a map to pinpoint the relevant stakeholders to trigger desirable discussions.

Figure 4: Generative AI Use-Case Pipeline for CRM

Generative AI Use-Case Pipeline for CRM



Source: Gartner
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Evidence

These use cases have been selected, positioned and averaged out, based on an assessment by Gartner analysts and customer feedback. Their applicability may vary across organizations and industries. For detailed customization, use Gartner's [Toolkit: Discover and Prioritize Your Best AI Use Cases With a Gartner Prism](#).

¹ **2023 Gartner Marketing Technology Survey.** This survey aimed to investigate the state of technology acquisition, adoption and use, including best practices for managing the technology stack, specific technologies in use and the degree of their adoption. It was conducted online from the end of May through June 2023. In total, 405 respondents were surveyed in their native languages across North America (n = 200), Western Europe (n = 173) and the Nordics (n = 32). Qualifying organizations reported enterprisewide annual revenue for fiscal year 2022 of at least \$100 million, with 80% of the respondents coming from organizations with \$1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (n = 39), insurance (n = 39), manufacturing (n = 41), consumer products (n = 38), retail (n = 39), travel and hospitality (n = 34), healthcare (n = 38), pharmaceuticals (n = 31), media (n = 34), tech products (n = 34), and IT and business services (n = 38). All the respondents were required to be senior decision makers, where the majority of their daily responsibilities mostly aligned with either business- or IT-focused marketing. Sixty-two percent of respondents were aligned to the marketing function, 18% to brand management, 11% to product marketing and management, 9% to customer services, and 2% to IT or other business units.

Recommended by the Authors

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[Use-Case Prism: Generative AI for Marketing](#)

[3 Ways Generative AI Augments Digital Commerce](#)

[Innovation Guide for Generative AI in Sales](#)

[How Can Generative AI Be Used to Improve Customer Service and Support?](#)

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[Quick Answer: How Marketing Can Use AI and ML to Optimize B2B Lead Management](#)

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[Multidimensional CRM: How GenAI Will Revolutionize Sales Force Automation Platforms](#)

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