

AI and the Future of CRM for Small to Medium Sized Businesses

Sales Enablement, Automations, and My Own Career Path

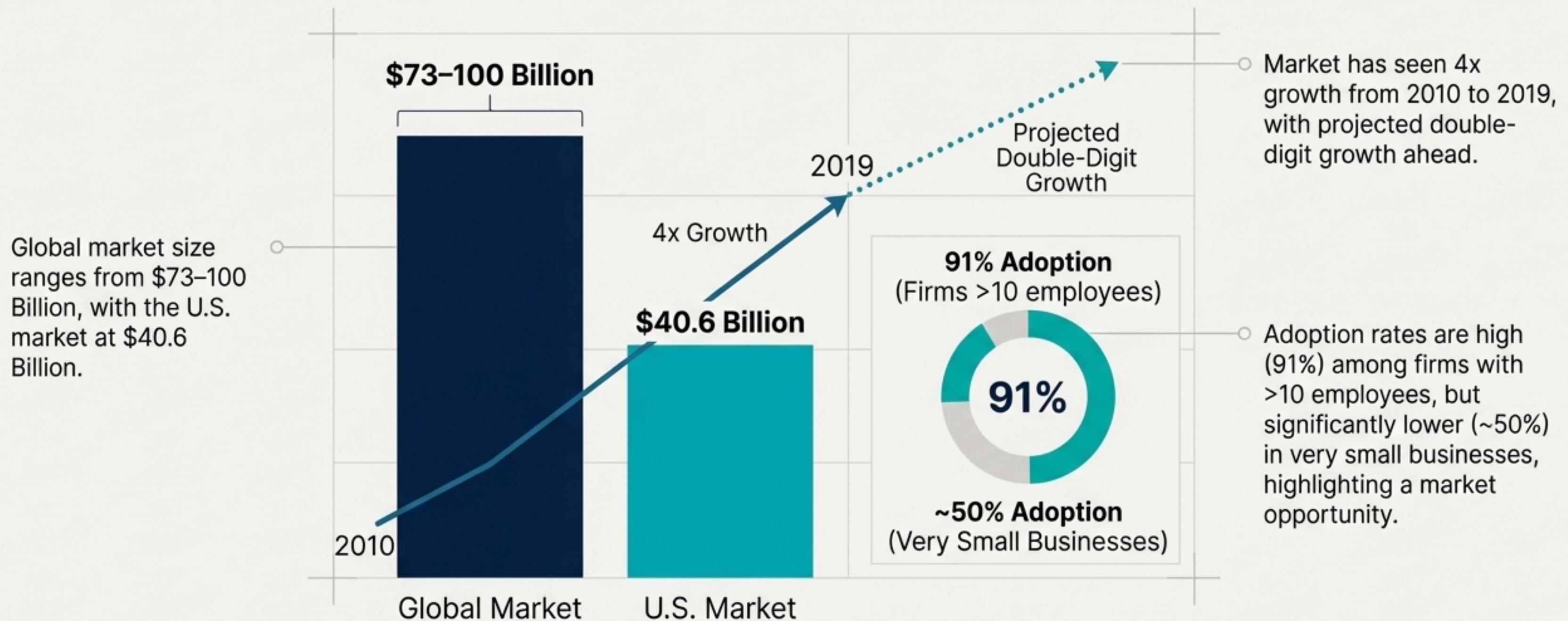
Matt Lavoie
RESECON 490AI – Fall 2025
UMass Amherst

Why I Chose U.S. SMB Sales Enablement & CRM

- Freelance real estate videography: realized I didn't want to stay in that business long term
- After building out my own CRM and automations, I realized I could sell this as a service to others
- Spent the past month building out a product built for contractors; now getting ready to start marketing

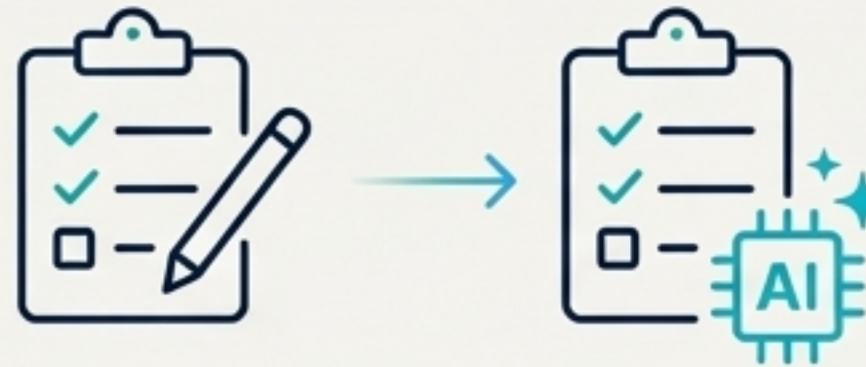


U.S. SMB Sales Enablement & CRM at a Glance

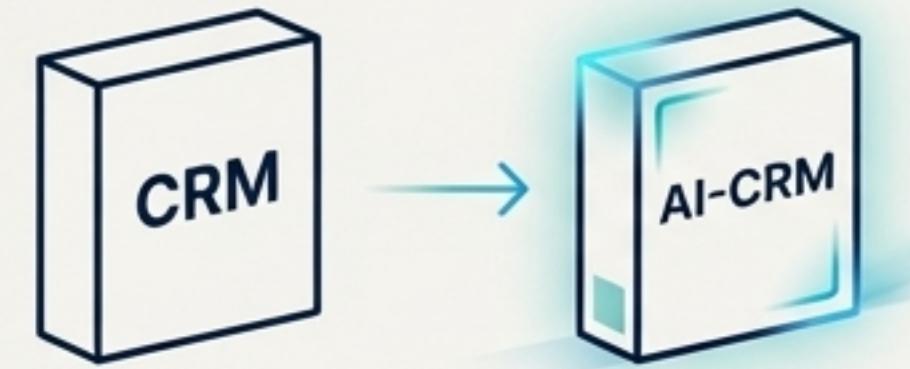


Based on market size and adoption this looks like a clear growth-stage industry.

How GenAI Is Reshaping CRM (Now and Next 2–5 Years)



From Manual Processes to
AI-Integrated Features



From Optional Feature
to Default Expectation



From Manual Hours to
Automated Operations

But it also creates risks around:



Bad Data



Over-
Automation



Platform
Dependence

My Plan



Launch & Learn (Now – 3 Months)

In the short run, I plan to keep working in a sales role over winter break while starting to market my software on the side.



Refine & Retain (Next 6–12 Months)

Over the next 6–12 months, my goal is to land and keep a small group of around 10 clients on a recurring subscription while I continue to refine my product.



The Product Vision

The goal is a simple built-for-you CRM with valuable automations and systematized delivery

What I Learned



Industry Insight

This project let me dig into the actual industry I'm building a product for.



AI as Partner

AI tools like ChatGPT and NotebookLM helped me find data, draft text, and sketch visualizations.



Human Ownership

I still owned the final product by iterating on creative details **over and over** until I was happy with it and it felt like my work.