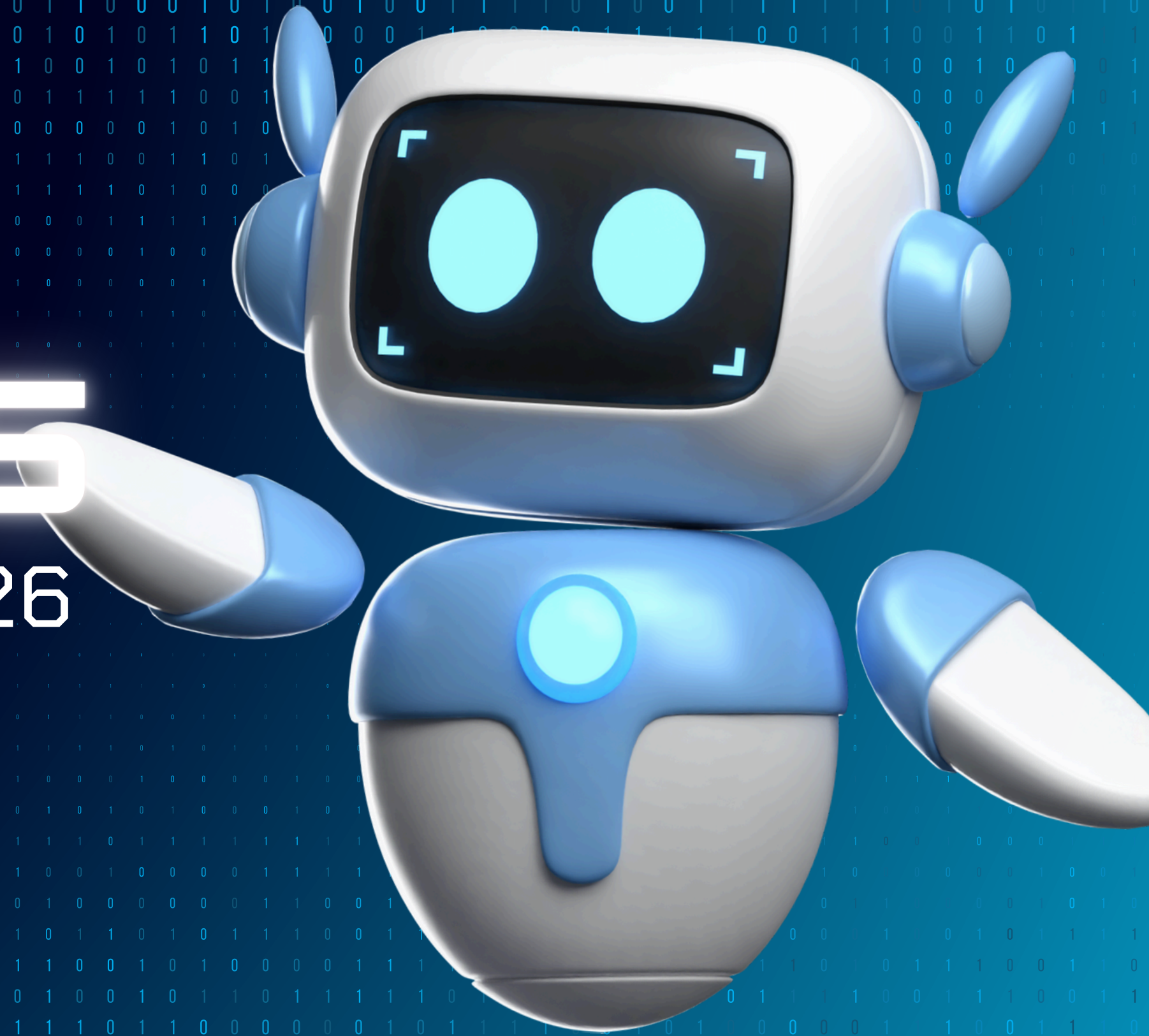


AI AGENTS

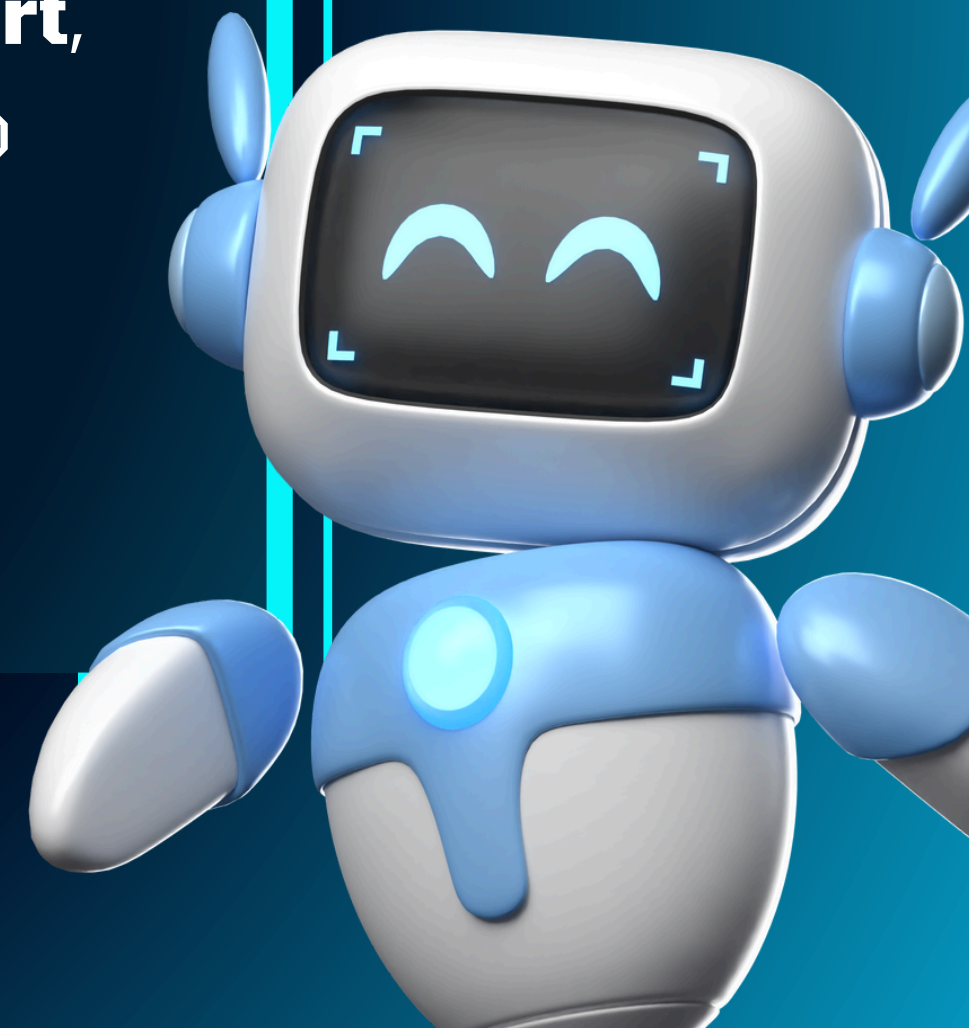
BBB AI STRATEGY 2025-2026





BBB AI STRATEGY OVERVIEW

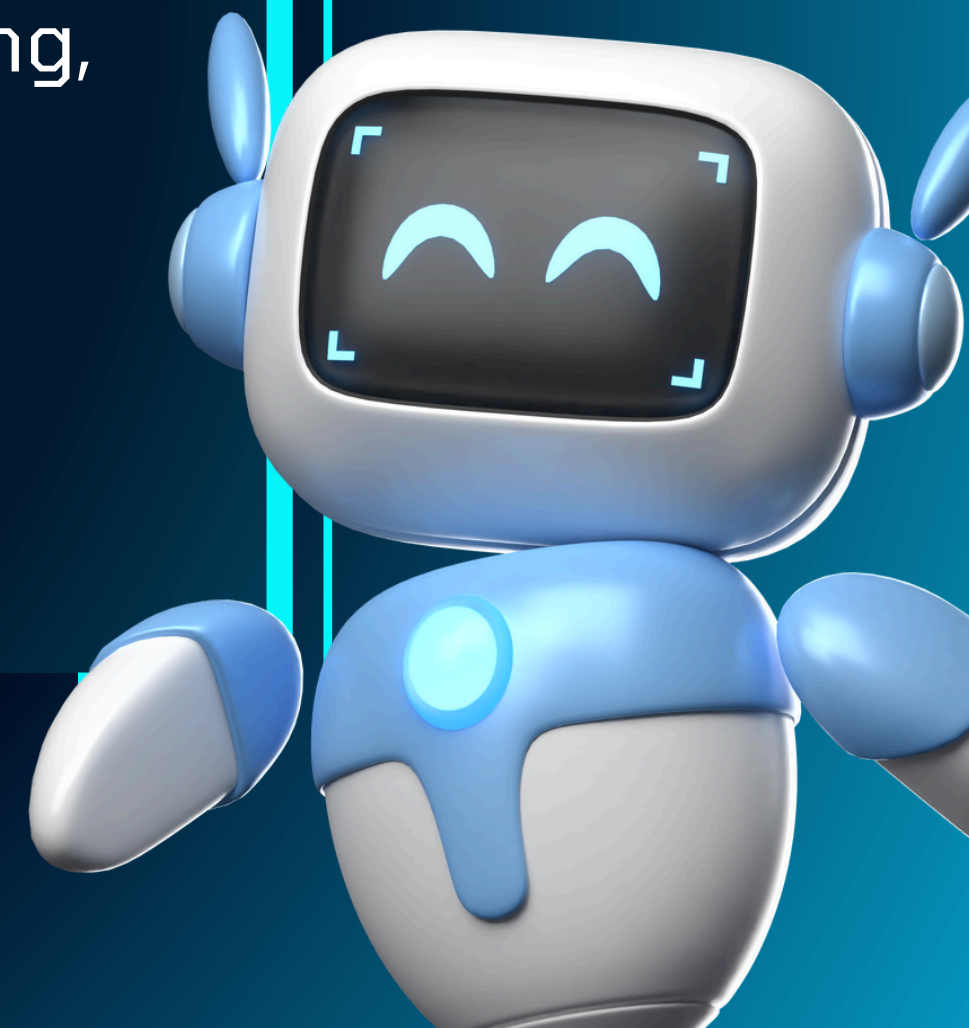
Equip every BBB workstream with a dedicated RAG-based AI Agent that operates **in real-time**, pulling from **internal + external data**, delivering **assistive support**, and producing **predictive & prescriptive insights** to improve decision-making, efficiency, and outcomes.



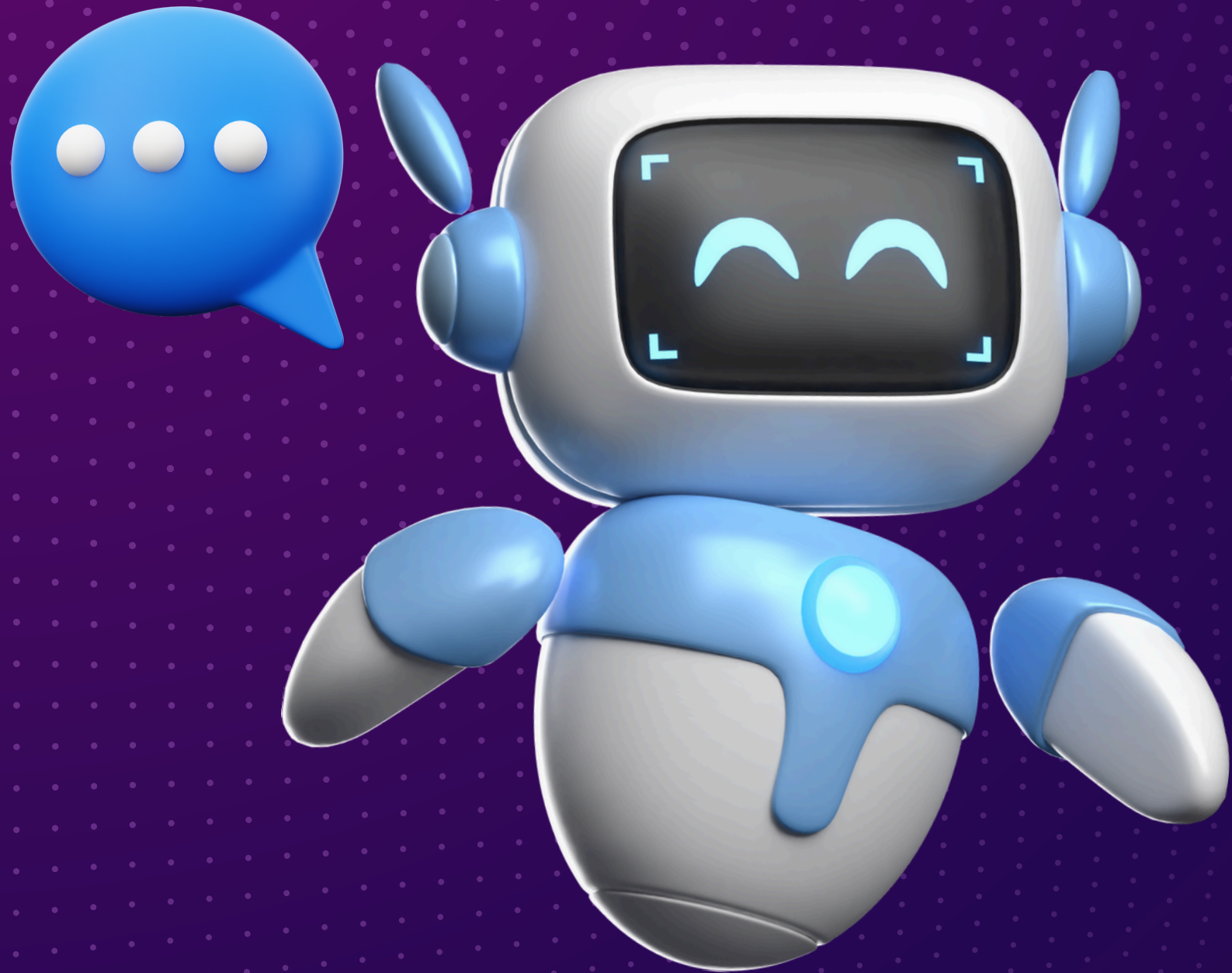


BBB AI STRATEGY OVERVIEW

Agents will support **CRM workstreams** (Marketing, Sales, Content, Customer Success, Marketing Solutions, Billing/Renewals) and **internal functions** (HR, Training, Coaching).



③ CRM: MARKETING AGENT



Assistive: Generate campaign ideas, optimize content for SEO, and provide competitor intel.

Predictive: Identify trending topics before they peak based on search, social, and industry signals.

Prescriptive: Recommend campaign timing, channels, and audience targeting for highest ROI.

④ CRM: SALES AGENT

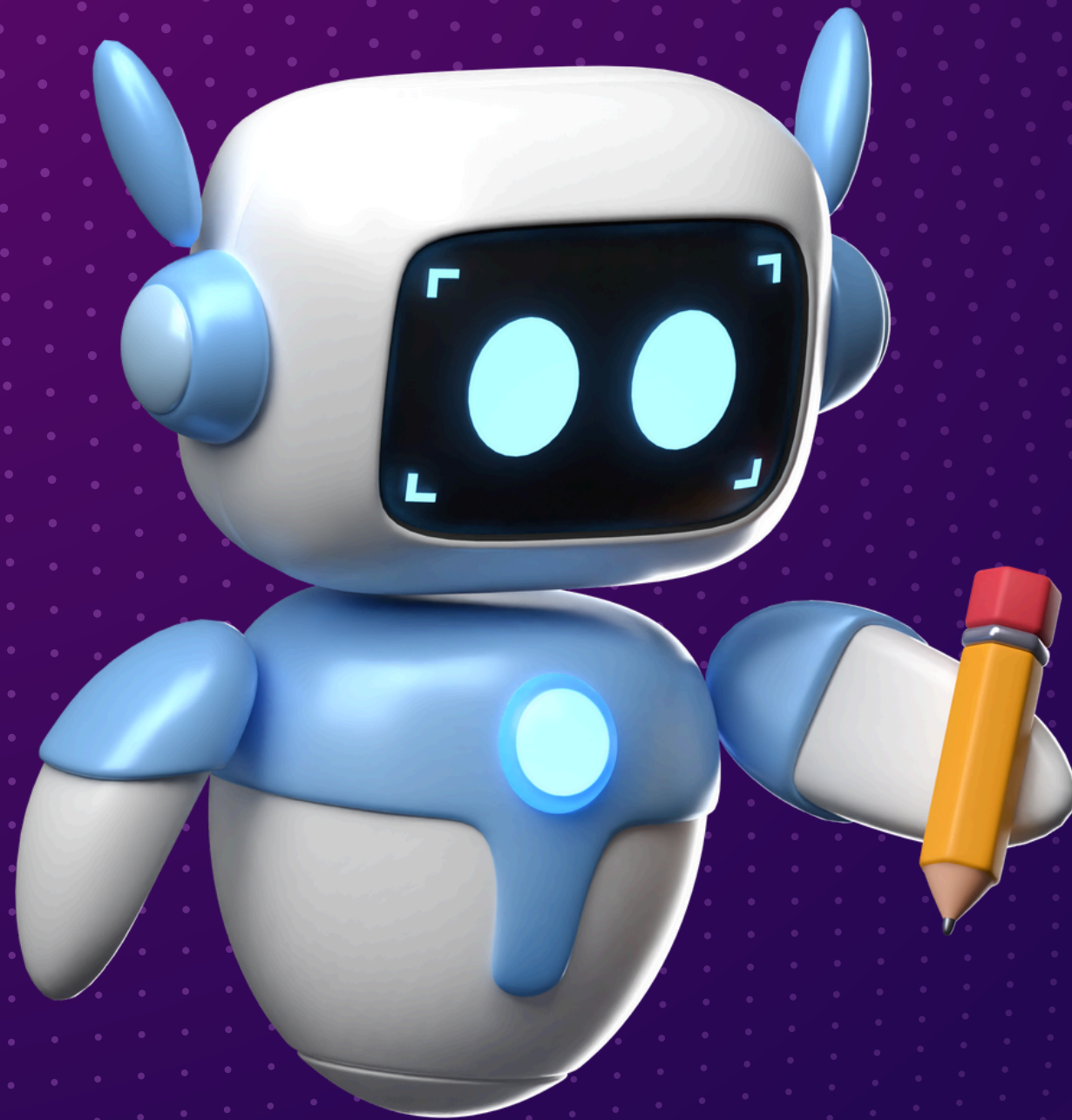
Assistive: Auto-generate call briefs with lead history, news, and competitor updates.

Predictive: Score leads in real time using CRM engagement data + external market cues.

Prescriptive: Suggest next-based actions, optimal contact times, and conversational paths.



⑤ CRM: CONTENT AGENT



Assistive: Draft and repurpose content for BBB.org, social channels, and email.

Predictive: Forecast content topics that will resonate with upcoming consumer trends.

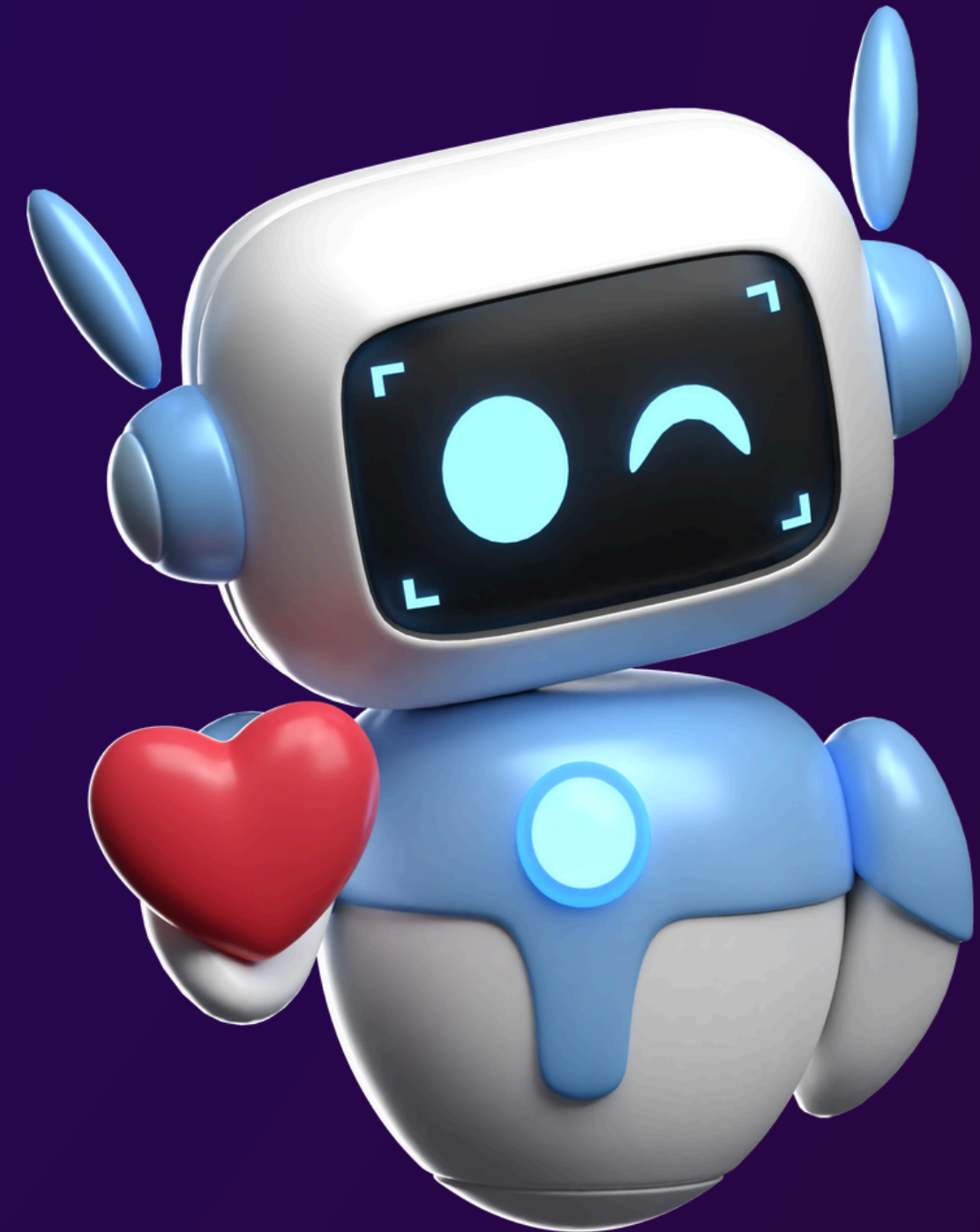
Prescriptive: Recommend tone, format, and distribution for maximum engagement.

⑥ CRM: CUSTOMER SUCCESS AGENT

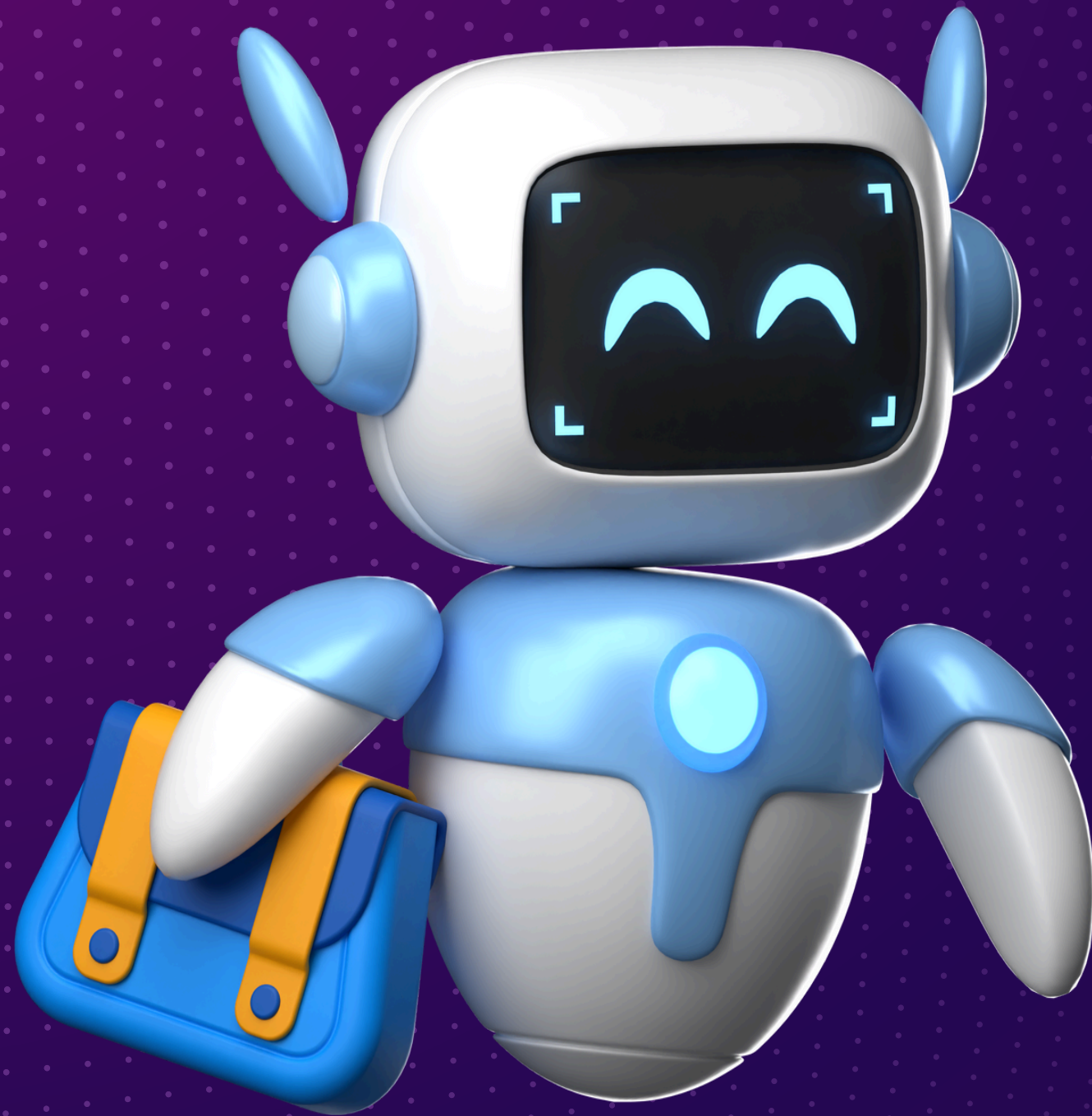
Assistive: Provide on-call access to BBB knowledge, policies, and customer history.

Predictive: Identify at-risk members/consumers based on engagement drop or complaint patterns.

Prescriptive: Recommend personalized retention actions and proactive outreach.



⑦ CRM: MARKETING SOLUTIONS AGENT



Assistive: Pull success stories, proof points, and ROI examples for sales pitches.

Predictive: Identify businesses most likely to benefit from marketing solutions.

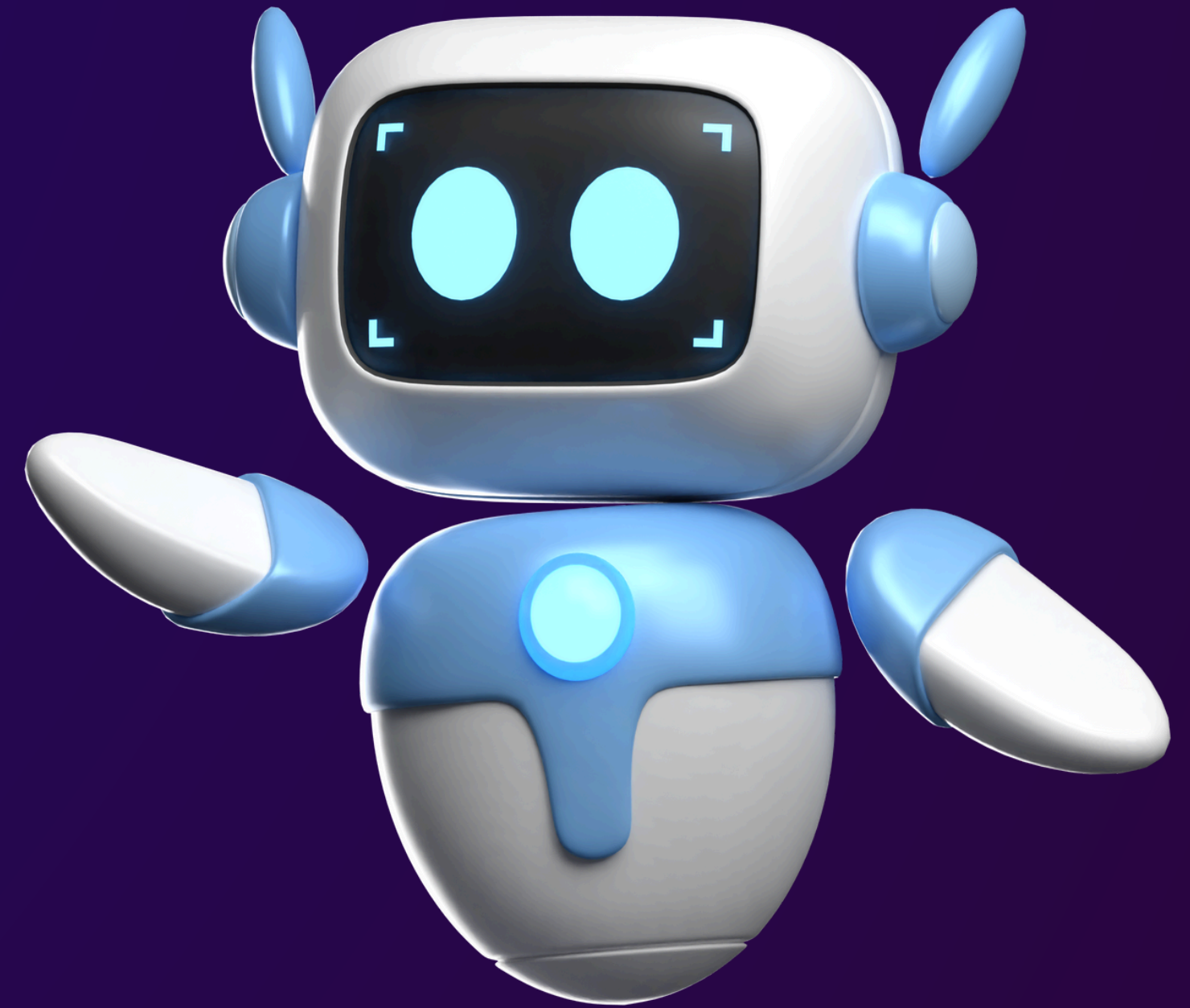
Prescriptive: Suggest custom solution packages based on client profile and goals.

⑧ CRM: BILLING/RENEWALS AGENT

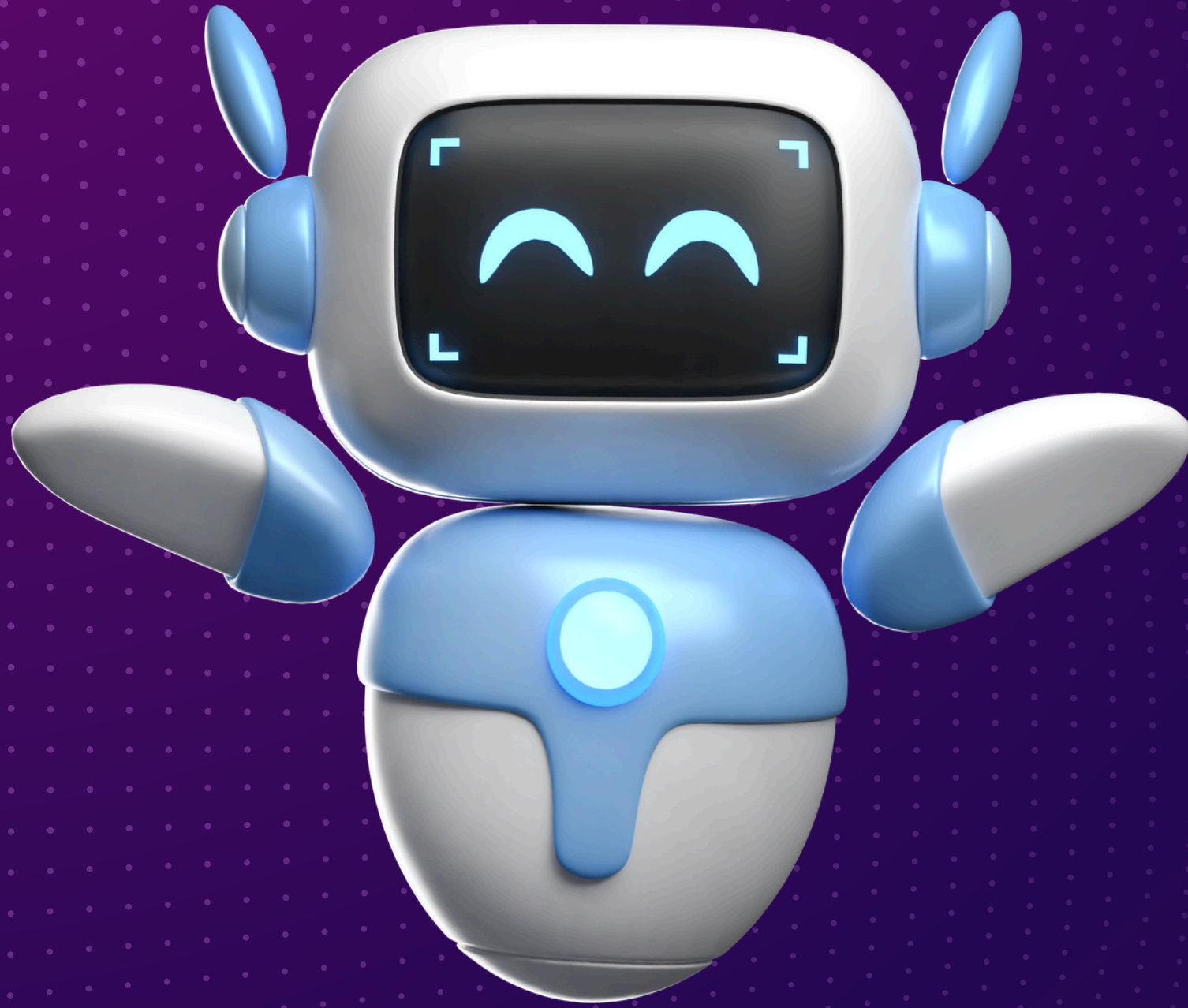
Assistive: Generate billing summaries, payment reminders, and FAQ answers on calls.

Predictive: Flag accounts likely to churn based on payment patterns or reduced engagement.

Prescriptive: Recommend tailored retention offers or service adjustments.



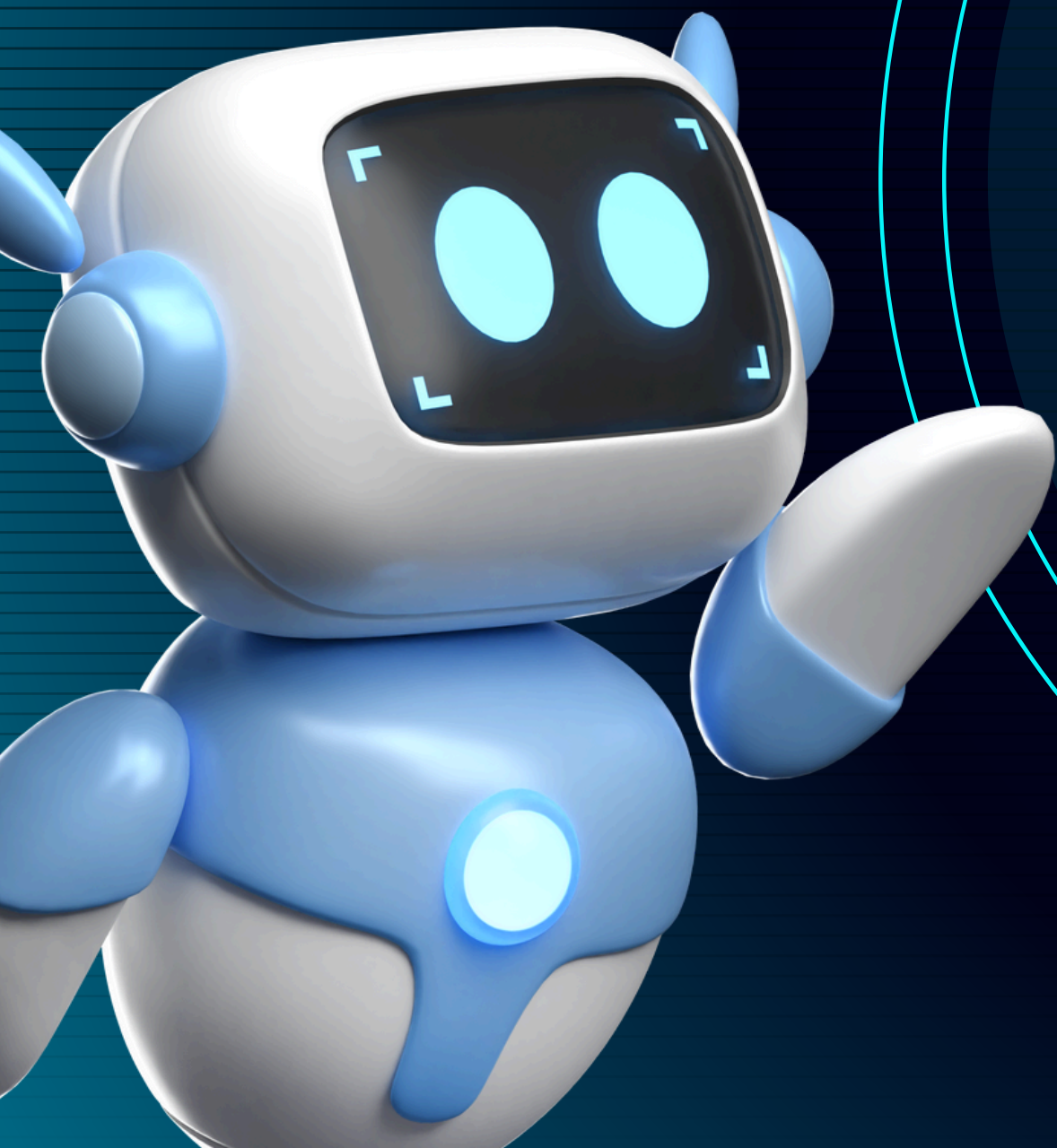
⑨ LIVE CALL COACHING LAYER (ALL)



Assistive: Real-time transcription and suggestion prompts during calls.

Predictive: Detect intent, sentiment, and likely objections mid-call.

Prescriptive: Coach reps live on optimal responses, upsell cues, and de-escalation tactics.

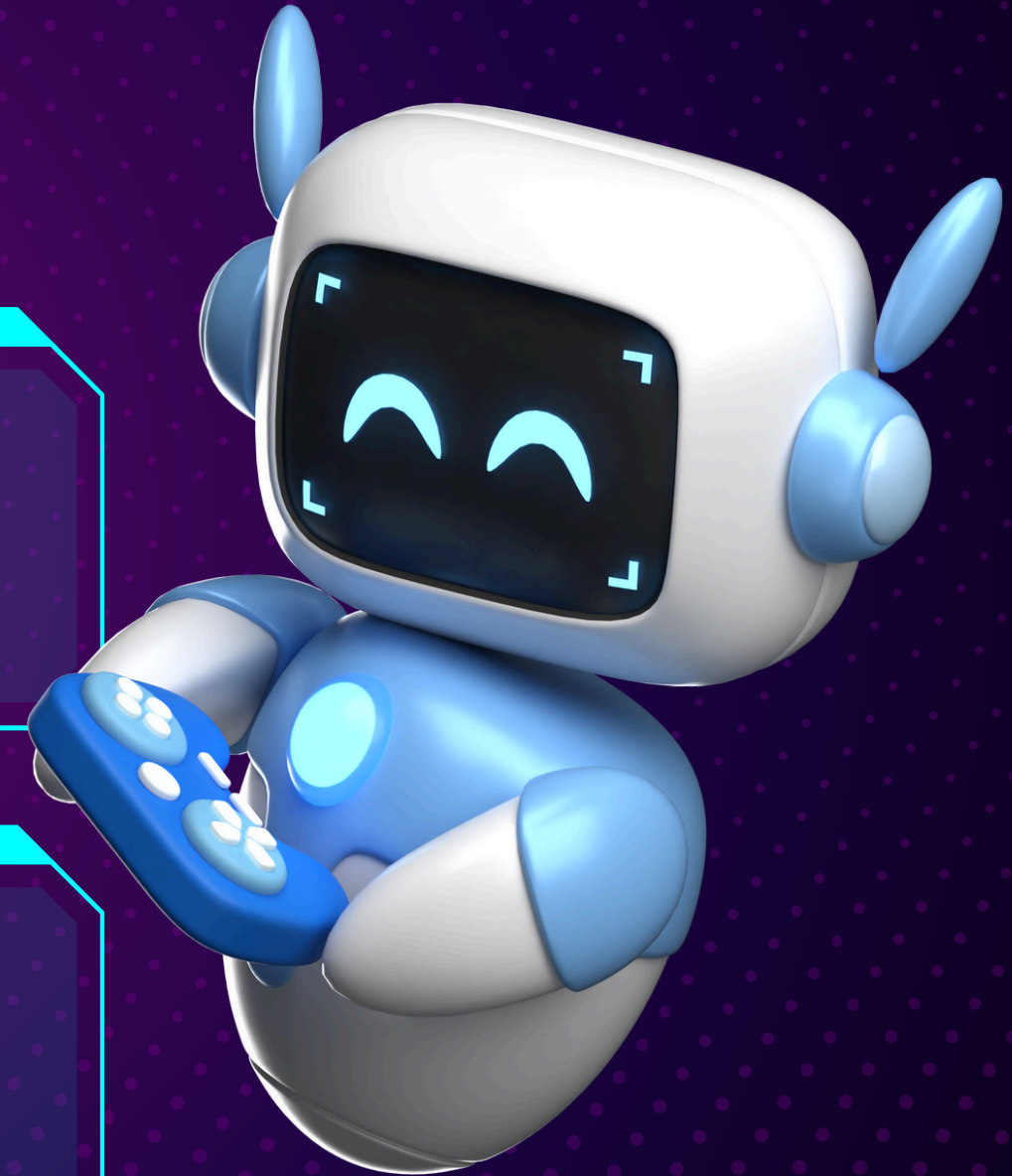


FUTURE & INTERNAL AGENTS

11 SALES COACH ENABLEMENT AGENT

Analyzes top-performing sales calls and generates best practice guides.

Creates personalized coaching plans for reps based on performance patterns.

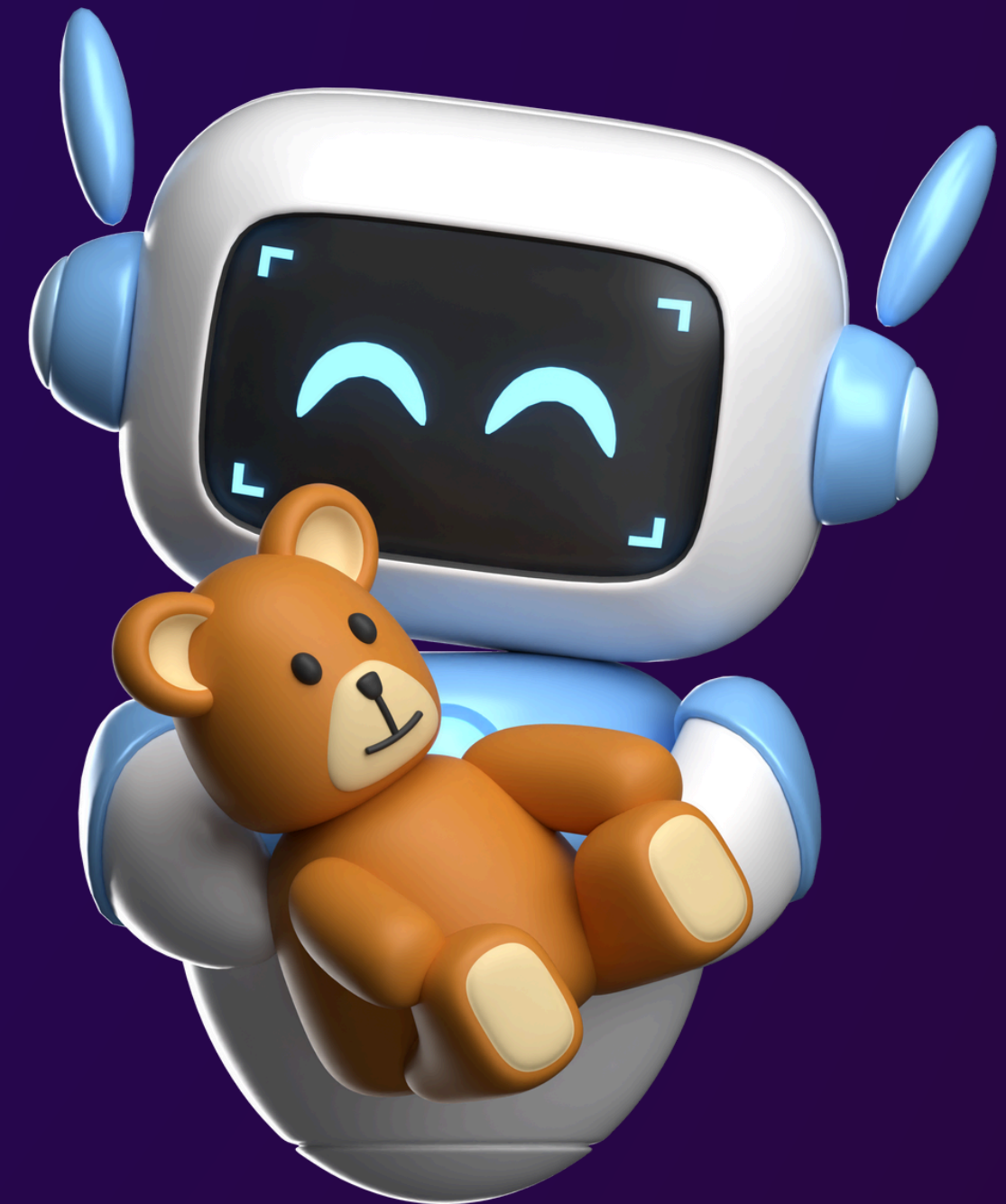


12 HR AGENT

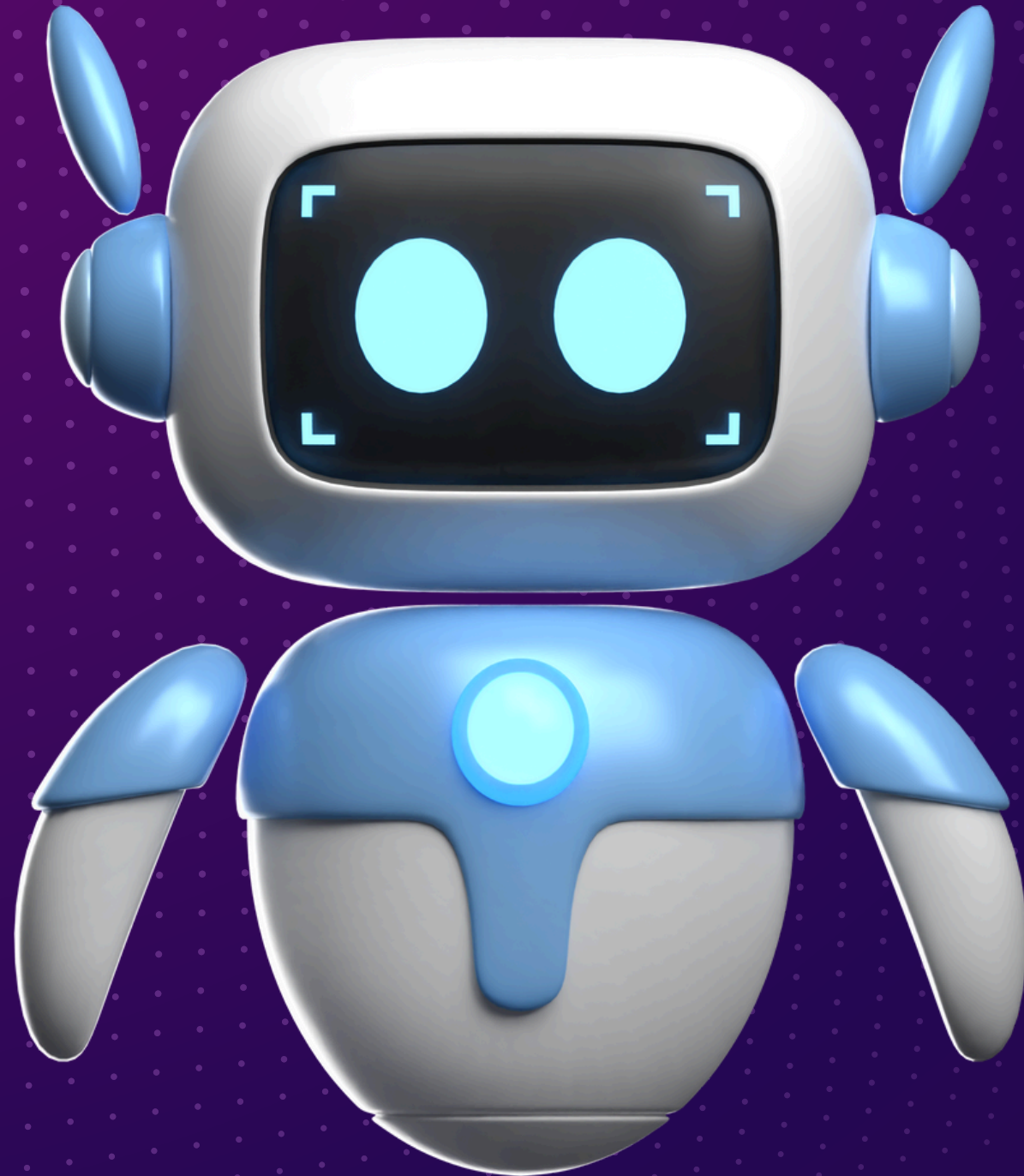
Assists with recruitment, onboarding, and employee engagement surveys.

Predicts attrition risks and skill gaps within team.

Prescribes targeted training and retention strategies.



TRAINING & COACHING AGENTS



Assistive: Aggregate knowledge from top calls and case resolutions.

Predictive: Identify skills that correlate with higher close rates or satisfaction.

Prescriptive: Build custom training modules and scenario-based coaching.