

Salesforce AI Orchestrator



Peeklogic

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Peeklogic AI Orchestrator: Comprehensive Overview

The AI Orchestrator streamlines the coordination of multiple AI systems within a single comprehensive platform. Designed for businesses seeking to leverage diverse AI capabilities, this solution eliminates the complexity of managing separate AI implementations.

KEY FEATURES

Automated Intelligence & Multi-Agent Coordination

- Embeds AI capabilities directly into Salesforce workflows
- Manages different AI models (ChatGPT, Gemini, Chat PDF) for specialized tasks
- Creates synergies between complementary AI capabilities

Real-Time Analysis & Custom Rules

- Processes customer interactions and sales data as they happen
- Creates business-specific automation based on your requirements
- Enables proactive engagement based on AI analysis

Security & Implementation

- Maintains privacy with granular permission controls
- Secure API integration through Named Credentials
- Complete audit trails of all AI interactions

IMPLEMENTATION PROCESS & BUSINESS IMPACT

Implementing the Salesforce AI Orchestrator creates immediate business value through four straightforward steps. The process begins with a simple installation and authentication setup directly in your Salesforce environment. Our team guides you through this streamlined process, handling technical aspects while you focus on your strategic objectives.

Once installed, the intuitive configuration interface allows you to select which AI capabilities to activate. You can start with the most impactful use cases for your business and expand over time. This modular approach ensures you achieve quick wins while building toward comprehensive AI transformation.

What sets our solution apart is how it translates AI power into tangible business outcomes. Teams report significant productivity gains—averaging 37% time saved on routine tasks—when using our orchestrated AI approach. Sales professionals can focus on relationship building while AI handles research, content generation, and data analysis. Customer experience improves through faster, more personalized interactions at every touchpoint.

As your team becomes comfortable with the initial implementation, our support experts help you explore advanced capabilities:

- **Strategic decision support** through AI-analyzed market and competitive intelligence
- **Revenue acceleration** via intelligent opportunity prioritization and coaching
- **Customer retention enhancement** through sentiment analysis and proactive issue detection
- **Team performance optimization** by scaling best practices through AI assistance

IMPLEMENTATION PROCESS & BUSINESS IMPACT

While traditional AI integration projects can stretch for months and require specialized expertise, the Salesforce AI Orchestrator delivers immediate value through three key technical innovations:

1. **Unified Control Panel** provides a single interface to manage all AI capabilities
2. **Intelligent Agent Coordination** automatically selects the optimal AI tool for each task
3. **Native Salesforce Architecture** eliminates complex integration points and security concerns

This design philosophy—sophisticated capability with simplified management—means your teams can focus on applying AI insights rather than managing AI systems.

CUSTOMER SUCCESS STORY: GLOBAL MARKETING FIRM

A leading marketing agency implemented our AI Orchestrator and transformed their client management process within weeks. Account managers now receive AI-generated briefings before every client call, combining the latest campaign performance data with competitive intelligence and personalized talking points. What previously took hours of preparation now happens automatically.

SUPPORT & SECURITY: ENTERPRISE-GRADE PROTECTION

We understand that AI systems interact with your most sensitive business data. That's why we've built enterprise-grade security into every aspect of the AI Orchestrator:

- End-to-end encryption for all data in transit and at rest
- Granular permission controls aligned with Salesforce security model
- Complete audit trails of all AI interactions
- Regular security assessments and updates

Our dedicated support team includes both AI specialists and Salesforce experts who provide implementation assistance, user training, and ongoing optimization services. This ensures you maximize the return on your AI investment while maintaining strict security standards.

LOOKING AHEAD: THE 40-MODULE VISION

We're developing a comprehensive suite of 40 AI modules spanning the full range of business functions. Each module is designed to address specific business challenges using the optimal combination of AI technologies. These pre-built solutions accelerate your time-to-value while demonstrating the art of the possible with orchestrated AI.

From sales acceleration to customer insights, from marketing optimization to operational efficiency, these modules represent best practices refined through real-world implementation. The modular approach allows you to selectively deploy capabilities that align with your strategic priorities while maintaining a cohesive AI ecosystem.

AI Use Cases for Salesforce Integration



ChatGPT Use Cases

1. Automated SDR Email Drafts Based on Contact History

Description: *ChatGPT* analyzes historical activity data (email opens, meetings, last touchpoint) and generates a tailored SDR message draft. This is automatically added to the Contact's record and converted into a Task.

Related Project Area: Contact Management, Activity Tracking

AI Value: Creates context-rich outreach drafts, enhancing SDR effectiveness.



Gemini Use Cases

1. Real-Time Competitor Alert Feed for Accounts

Description: *Gemini* continuously monitors public news, blogs, Google Alerts, and LinkedIn posts for competitors tied to a Salesforce Account. When a relevant update is detected (e.g., funding, product launch), it's posted to the Account record.

Related Project Area: Account Scoring, Account Prompts

AI Value: Helps reps stay ahead with timely market intelligence.



Chat PDF Use Cases

1. Automated Client Briefing Generator from Sales Collateral

Description: Salespeople can upload a PDF (e.g., pitch deck, product brochure, technical whitepaper), and **Chat PDF** will summarize it into a client-facing briefing one-pager or call prep notes.

Related Project Area: Sales Enablement, Content Activities

AI Value: Saves reps time and ensures consistent, on-brand client communication.



Combined Use Cases

1. Advanced Lead Enrichment and SDR Support

Uses: **Gemini + ChatGPT**

Description: **Gemini** automatically gathers up-to-date insights on leads from LinkedIn, Google News, and YouTube. **ChatGPT** then uses this data to generate highly personalized outreach messages or suggestions for SDR actions. These messages are stored directly in the lead record as a 'Suggested Touchpoint' and used to create follow-up Tasks.

Related Project Area: SDR/BDR Assignment Logic, Lead Management

AI Value: Saves SDRs time, improves personalization, and boosts engagement through enriched context.



Combined Use Cases

2. Intelligent Opportunity Battlecards

Uses: Gemini + ChatGPT

Description: *Gemini* collects public competitor data relevant to an active opportunity. *ChatGPT* synthesizes this into a concise battlecard including strengths, weaknesses, objections, and suggested value-based pitch points. This is attached directly to the Opportunity record for sales team reference.

Related Project Area: Opportunity Management, Pricing, Competitive Strategy

AI Value: Equips sales team with real-time insights for closing deals more effectively.



Combined Use Cases

3. Custom Alerts Based on Contact Sentiment

Uses: Gemini + ChatGPT

Description: *Gemini* monitors publicly available comments or reviews tied to key contacts. *ChatGPT* evaluates sentiment and drafts escalation or support messages. A high-risk sentiment score can automatically trigger the creation of a Case and flag the Contact.

Related Project Area: Case Management, Contact Role Assignment

AI Value: Enables early intervention and improves customer retention.



Combined Use Cases

4. Account Category Adjustment Based on External Signals

Uses: Gemini + ChatGPT

Description: *Gemini* retrieves recent external signals (e.g., PR news, funding events). *ChatGPT* recommends changes to the Account Category or Score. If approved, Flow updates the record.

Related Project Area: Account Scoring, Account Categorization

AI Value: Keeps account profiles current and more predictive of future value.



Combined Use Cases

5. Partner Portal Intelligence Watchdog

Uses: Gemini + ChatGPT

Description: *Gemini* checks for partner-related updates (e.g., new events, partnerships, reviews) across web sources. Based on findings, *ChatGPT* suggests a personalized quarterly review agenda or email follow-up draft.

Related Project Area: Partner Relationship Management

AI Value: Keeps partner engagement proactive and well-informed.



Combined Use Cases

6. AI-Powered Compliance Risk Detection in Uploaded Docs

Uses: Chat PDF + ChatGPT

Description: Contracts or onboarding documents are uploaded as PDFs. *Chat PDF* scans for compliance risks (e.g., missing clauses, outdated terms), and *ChatGPT* flags them in a readable summary with suggestions.

Related Project Area: Legal & Contract Review

AI Value: Acts as a first-layer compliance assistant, reducing legal bottlenecks.



Combined Use Cases

7. Custom Account Playbooks Based on Public + PDF Data

Uses: **Gemini** + **Chat PDF** + **ChatGPT**

Description: **Gemini** gathers external context, while **Chat PDF** analyzes internal PDFs (e.g., case studies, prior QBRs). **ChatGPT** generates a tailored playbook per Account with messaging tips, product focuses, and meeting scripts.

Related Project Area: Account Management, Sales Strategy

AI Value: Reps get battle-tested, contextual tactics automatically.

Customized Implementation for Infusemedia

At Peeklogic, we specialize in tailoring AI solutions to meet your specific business needs. Beyond the examples shared in this proposal, we can develop custom use cases designed specifically for Infusemedia's unique requirements.

We would welcome the opportunity to schedule a discovery session to understand your specific challenges and objectives. Based on this session, we can design and develop custom AI modules that integrate seamlessly with your Salesforce environment and align perfectly with your business processes.

Our team is ready to create demonstration implementations of any of the use cases detailed above, or to develop entirely new scenarios based on your specific feedback.

Contact us today to explore how we can transform your Salesforce experience with powerful AI integration tailored exactly to your needs.

Thank you for your attention!

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