inQdo

WHITE PAPER.

Accelerating sales processes with AWS Bedrock Agents

How AI assistants bridge the gap between CRM and users

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Introduction

In a world where digital transformation has become the standard, organisations face a paradox: despite an abundance of tools and data, effectively utilising them remains a challenge. This is particularly evident in sales environments, where professionals must switch daily between CRM systems like HubSpot, internal databases and customer conversations. A simple question such as 'Who is the account manager for client X?' can require minutes of searching and switching between screens. The result: interrupted customer conversations, lost productivity and frustration.

The core of the problem lies not in a lack of information but in how it is made accessible. This is precisely where a new technology offers a groundbreaking solution: **AWS Bedrock Agents**. Launched in November 2023, these AI assistants combine advanced foundation models with intelligent orchestration. They transform complex tasks into automated workflows and make data directly accessible exactly where sales staff need it.

This whitepaper illustrates how AWS Bedrock Agents can be seamlessly integrated with systems such as HubSpot. We delve into the technology, explore a proof of concept and demonstrate how this solution enables sales professionals to work faster, more efficiently and with greater customer focus.

AWS Bedrock Agents are more than just a tool; they represent the next step in streamlining business processes and bridging the gap between data and users.

Are you ready to harness the power of AI in your sales organisation?

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The challenge: The reality of modern customer management

For many sales professionals, it's a familiar scenario: a client calls with an urgent question about an ongoing project. The employee opens HubSpot, navigates through multiple screens searching for the right contact person, switches to other systems to find additional information, and tries to maintain the conversation simultaneously. These constant context switches not only disrupt workflow but also diminish the quality of customer contact.

The problem isn't a lack of information—it's abundant. However, its fragmentation across different systems makes finding answers time-consuming and frustrating. Take that seemingly simple question mentioned earlier: 'Who is the account manager for client X?' Often, answering this question requires multiple steps: looking up company information, clicking through to specific contact details, and manually copying data. These actions are further complicated by the complexity and quantity of functionalities in modern CRM systems like HubSpot, which often aren't fully utilised.

The challenge only grows as organisations expand. Adding more tools and systems makes workflows more complex and increases the risk that valuable CRM system functions remain unused. The impact resonates throughout the entire organisation:

- **Lost productivity:** Sales professionals lose valuable time on repetitive searches, often spread across multiple tools.
- **Interrupted customer conversations:** Constant switching between systems makes it harder to be fully present in conversations.
- **Untapped possibilities:** Advanced features in CRM tools often remain unused simply because they're too cumbersome to deploy quickly.

The consequences aren't just frustrating; they directly impact revenue. Less efficient workflows mean fewer customer contacts daily and thus missed opportunities.

With the advent of AWS Bedrock Agents, a solution that goes beyond simple automation emerges. By making information accessible intuitively, sales professionals can focus entirely on what truly matters: building relationships and closing deals.

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AWS Bedrock Agents: An intelligent solution

AWS Bedrock Agents represent a new generation of AI assistants who answer questions and independently execute complex, multi-step tasks. They build upon the power of foundation models like ChatGPT and Claude but distinguish themselves through their ability to connect with business processes and systems seamlessly. This technology makes information more accessible than ever before.

One of the most impressive characteristics of Bedrock Agents is their ability to transform users' natural language requests into practical actions. Imagine a sales professional asking during a customer conversation: 'Who is responsible for project X?' The agent can interpret this question, retrieve relevant data from systems like HubSpot and present it immediately—all without the user needing to interrupt their workflow. This process utilises Retrieval-Augmented Generation (RAG), enabling agents to combine information from various sources to generate accurate, contextual answers.

Moreover, Bedrock Agents go beyond simple searches. Thanks to their reasoning capabilities, they break down complex tasks into smaller, logical steps and execute these independently. Thus, they can retrieve data and initiate follow-up actions, such as

calling an API to update a customer file. This makes them particularly suitable for streamlining business processes.

> **The result is a solution that goes beyond mere automation.**

This power is enhanced by integration with AWS technologies. Bedrock Agents run on a solid infrastructure that utilises AWS Lambda for scalable and efficient task execution. The result is a solution that goes beyond mere automation. Bedrock Agents connect technologies, teams and data, enabling sales organisations to work more effectively. For businesses, this means time savings and significant improvement in customer satisfaction and operational efficiency.

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Technical architecture

The power of AWS Bedrock Agents lies in their intelligent and flexible architecture, designed to work seamlessly with existing systems like HubSpot. This architecture combines advanced AI capabilities with reliable AWS services, allowing businesses to automate complex tasks without sacrificing speed or security.

Central to this architecture is the Bedrock Agent, which functions as an orchestrator. This agent analyses user requests, determines which actions are needed and executes these using integrated AWS services like Lambda. For example, when an employee asks a question like 'Which contacts are linked to client Y?', the agent interprets the question, retrieves the necessary data from HubSpot and presents it directly in a user-friendly display.

An essential component of the technical stack is intelligent data enrichment, made possible by Retrieval-Augmented Generation (RAG). This allows agents to combine relevant data from various internal and external sources to provide a complete and contextual answer. Thus, a sales employee can see who is responsible for an account and view relevant notes and appointments within a single interface.

The architecture also supports dynamic error handling. This means that if a particular data query fails, the agent can automatically

execute alternative actions or request additional information. Imagine a user asking for a recent contract, but the system cannot find results in HubSpot. The agent can then automatically consult an alternative source, such as PandaDoc or Confluence, to locate the needed information.

A proof-of-concept demonstrates how this architecture functions in an integration with Slack. Users can ask questions like 'Who owns client X?', after which the agent identifies the owner and presents additional information such as contact details and outstanding actions. This example shows how the architecture can be flexibly deployed but is not yet a large-scale application.

Thanks to AWS-native security, sensitive data is protected throughout the process, with strict access control and encryption built in as standard. AWS Lambda is also a connecting link, enabling scalability and real-time task execution.

With this modular and scalable setup, the technical architecture of Bedrock Agents provides a robust foundation for streamlining business processes. Whether for simple searches or complex workflows, this solution adapts to the needs of any organisation.

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Best practices for implementation

Successful implementation of AWS Bedrock Agents requires more than technical integration. Strategic choices and an iterative approach help organisations maximise the benefits of this innovative technology. The following best practices facilitate smooth implementation and maximise impact.

Start small and scale up
Begin by identifying a specific problem that is solvable with Bedrock Agents. For example, use the agent to automate repetitive tasks like retrieving contact information. This allows teams to test the technology in a controlled environment and gather feedback. Once basic functionality is proven, the technology can be expanded to more complex workflows, such as managing customer files or driving automated follow-ups.

Focus on smart API integration
Bedrock Agents excel when seamlessly integrated with systems like HubSpot, Slack or other business-critical applications. Well-designed API coupling enables real-time data synchronisation and process automation. Ensure APIs are well-documented and secured so the

agent can operate flawlessly. This prevents downtime and promotes user confidence.

Invest in effective prompt engineering
One of the most powerful functions of Bedrock Agents is their ability to interpret natural language requests. Through careful prompt design, you can optimise agent responses. Consider clear instructions and example response structures. For instance, if users frequently ask about open deals, you can set up a prompt that includes standard information about amounts, deadlines and involved account managers. This approach ensures consistent and relevant answers.

Utilise AWS tools for monitoring and optimisation
AWS offers various tools to monitor and improve Bedrock Agents' performance.

Amazon CloudWatch can be deployed to track system activities in real time, while AWS Config helps ensure compliance with security and configuration requirements. These tools enable proactive resolution of bottlenecks and continuous optimisation of agent functionality.

As Bedrock Agents have access to sensitive business data, security must be a priority during implementation

Measure and optimise continuously

After implementation, it's important to continue measuring Bedrock Agent performance. Use monitoring tools to gain insight into usage patterns, success rates and potential bottlenecks. Based on this data, you can implement improvements, such as adding new functionalities or refining prompts.

Security and compliance from day one

As Bedrock Agents have access to sensitive business data, security must be a priority during implementation. Utilise AWS-native security features such as encryption and access management. Additionally, ensure the agent complies with relevant regulations, such as NIS2, and implement best practices in data privacy.

Involve users early in the process

New technology adoption depends on end-user engagement. Train your team to use Bedrock Agents and involve them in workflow design effectively. By allowing users to test early and provide feedback, you can resolve bottlenecks and increase support.

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Security and compliance

As mentioned, security must be central when implementing AWS Bedrock Agents. The technology is designed to work seamlessly with AWS-native security measures, meaning sensitive data and processes are well-protected from the start. Bedrock Agents utilise proven AWS services such as Identity and Access Management (IAM), data transmission encryption and advanced logging via AWS CloudTrail.

Security at every step

Bedrock Agents' security begins with design. Access rights are strictly managed via IAM roles, ensuring only authorised users and systems can access specific data and functionalities. Data processed through Bedrock Agents remains protected by encryption during transmission and storage. This makes the technology suitable for processing business-sensitive information, such as customer data and contracts.

Regulatory compliance

Operating within AWS infrastructure, Bedrock Agents benefit from AWS certifications and compliance with regulations such as ISO 27001, SOC2 and GDPR. Businesses using Bedrock Agents can more easily comply with stricter guidelines, such as new requirements from the NIS2 directive.

Warning: Security is not automatic

While AWS provides a solid foundation for security, organisations remain responsible for correctly configuring their systems. Careless API configurations or lack of monitoring can create risks such as unauthorised access or data breaches. Therefore, it's essential to follow best practices and regularly audit integrations and processes that Bedrock Agents use.

Continuous improvement

One advantage of working with AWS is access to built-in monitoring tools like Amazon CloudWatch and AWS Config. These enable real-time anomaly identification and compliance assurance. These tools make it possible to improve security measures and proactively manage potential risks continuously.

AWS Bedrock Agents combine advanced AI functionality with AWS's proven security and compliance. This ensures your organisation can rely on a secure and reliable environment without worrying about data or process integrity.

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Impact and results

AWS Bedrock Agents offer promising capabilities to streamline workflows, save time and improve customer interactions. Though the technology is still relatively early, initial tests and pilots already demonstrate the impact organisations can expect from successful implementation.

Potential quantitative benefits

During internal testing, inQdo's team found that Bedrock Agents can significantly reduce the time needed to find contact information in HubSpot. Where an employee typically spends five to ten minutes searching and switching between screens, an agent can present this information within seconds. Actual impact may vary depending on workflow complexity, number of integrated systems and team adoption rates.

> **Beyond time savings, users see benefits in work quality.**

Qualitative improvements

Beyond time savings, users see benefits in work quality. By automating repetitive tasks, staff can focus on customer conversations and strategic activities. This increases productivity and employee satisfaction, as they spend less time on manual processes and gain more space to add value.

Another key advantage is output consistency. Bedrock Agents ensure answers to questions are always based on current and accurate data, increasing reliability towards customers. This can contribute to better customer relationships and stronger brand perception.

The potential of Bedrock Agents

While impact figures are based on limited tests, they demonstrate how Bedrock Agents can contribute to more efficient working methods within sales organisations. As more businesses adopt and expand the technology to broader applications, the true impact will become more apparent.

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Future vision: The evolution of AI-driven sales support

AWS Bedrock Agents are still in early development, but technological progress and growing adoption promise an impressive future. While current applications focus on automating specific workflows and providing quick access to information, this technology opens the door to a new way of working.

Short term (2024-2025): Optimisation and adoption

In the coming years, organisations will refine Bedrock Agents and apply them within existing processes. Expect improvements in how agents interpret prompts, handle complex questions and expand integrations with other platforms. Most applications will remain focused on supporting operational tasks like customer management. Meanwhile, new use cases, such as generating strategic insights from combined datasets, will gain increasing attention.

Medium-term (2025-2026): New levels of integration

As businesses increasingly embrace Bedrock Agents, the technology will become more deeply anchored in business processes. Agents can be deployed to proactively deliver insights, such as predicting customer behaviour based on historical data. Additionally, they can be used for cross-functional integrations, combining data from sales, marketing and support to create complete customer profiles. This deepening strengthens team collaboration and paves the way for more personalised customer interactions.

Long-term (2026 and beyond): AI as a strategic partner

In the long term, Bedrock Agents have the potential to play a strategic role in organisations. Through further integration with emerging technologies

such as IoT and real-time analytics, agents can respond to requests and act proactively. Consider autonomous handling of routine tasks, such as scheduling follow-ups or identifying opportunities in the sales pipeline, without requiring employee intervention.

Additionally, the evolution of the foundation model will ensure that agents become increasingly capable of performing complex reasoning and in-depth analyses. This enables them to play an essential role in strategic decision-making, for example, by providing market analysis or scenario predictions.

AI-driven solutions like AWS Bedrock Agents will permanently change how organisations work.

A future full of possibilities

While we're only beginning to explore this technology's boundaries, one thing is clear: AI-driven solutions like AWS Bedrock Agents will permanently change how organisations work. By making processes more intelligent, faster and more accessible, businesses can shift their focus to what truly matters: building strong customer relationships and achieving sustainable growth.

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Getting Started with Bedrock Agents

AWS Bedrock Agents offer organisations a unique opportunity to transform their processes using advanced AI technology. Whether you want to improve sales staff productivity, optimise customer experience or automate repetitive tasks, this technology provides a solid foundation to achieve those goals.

Follow this 3-step plan for a smooth start:

1. Start small and test

Begin with a proof-of-concept to test Bedrock Agents' capabilities in your specific environment. Choose a clearly defined use case, such as accelerating simple searches in a CRM system. This helps quickly experience the technology in practice and gather initial insights about its impact.

2. Scale gradually

Expand Bedrock Agents' functionalities to broader workflows. Consider coordinating customer communication or integrating data from multiple systems. By scaling gradually, you maintain control over implementation and can optimise functionalities based on user feedback.

3. Build for continuity

Ensure user training, performance monitoring and periodic evaluations. Use insights from daily use to refine prompts and workflows further. With a proactive approach, you can extract increasing value from the technology and strategically deploy Bedrock Agents within your organisation.

With AWS's scalable architecture, you can flexibly and securely integrate Bedrock Agents into your existing systems. By starting small and expanding gradually, you ensure successful and sustainable implementation.

Want to discover how your organisation can benefit from AWS Bedrock Agents? inQdo is ready to support you at every step, from proof-of-concept to full implementation. Contact us today and discover how we can transform your organisation with this innovative AI solution.

About inQdo

inQdo is an AWS Advanced Consulting Partner specialising in cloud solutions and digital transformation. With a team of experienced cloud developers, we help organisations implement innovative solutions that create business value.

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