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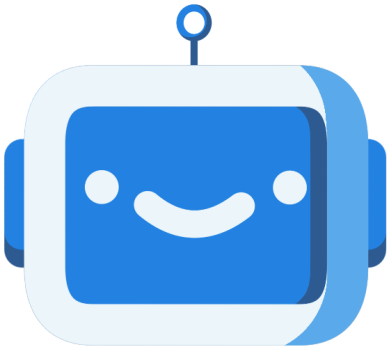

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B4B Transition Pathways

AI Transition Roadmap for SMEs

Introduction

This roadmap provides a structured path and timetable for small and medium-sized enterprises (SMEs) wishing to adopt artificial intelligence (AI) technologies. It outlines a **five-phase framework**, that can be applied across all SMEs:

1. Assessment and Readiness
2. Technology Selecting and Planning
3. Implementation and Integration
4. Monitoring and Optimisation
5. Compliance, Ethics, and Scaling

It is a guide based on the best practices taking into account the regional disparities of AI adoption across EU analysed in the partner countries **France, Spain, Croatia, Austria, Italy, Ireland**: each partner has chosen **3 national and 1 EU example from a country not represented within the consortium.**

The research revealed a list of SME sectors where AI has been applied in various processes and activities, as follows:

- Commerce, Marketing and Sales
- Industry and Manufacturing
- Digital and Information
- Technology Healthcare and Life Sciences
- Business and Professional Services
- Finance and Fintech
- Logistics and Hospitality

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However, we recognise that SMEs may find it challenging to see how these phases apply in practice to their specific industries. For this reason, the roadmap is organised into two parts:

1. Core framework : a general transition model applicable to all SMEs.
2. Specific pathways for sectors: subsections that illustrate, with concrete examples, how the framework can be tailored to different industries identified in the analysis.

This dual approach ensures that SMEs can benefit from a structured transition model while also accessing practical, sector-relevant guidance for AI adoption.

The Core Framework

The Core Framework outlines a step-by-step path for small and medium-sized enterprises (SMEs) to adopt artificial intelligence (AI). It is designed to be applicable to all types of SMEs, regardless of their sector of activity. The framework is structured in five progressive stages, each providing practical guidance and key activities.

Phase 1: Assessment and Readiness

In this initial phase, SMEs evaluate their digital maturity, identify operational challenges, and assess their readiness for AI adoption.

Key activities:

- conduct internal audits to identify inefficiencies and opportunities for AI;
- engage staff to understand digital skill levels and reduce resistance to change;
- explore sector-specific AI applications.

The main goal is to understand where your company stands and where AI can help. This goal is the **strategic starting point** for any AI-driven transformation initiative. It means conducting a realistic and structured analysis of your company's current situation, and then identifying exactly **where AI can create tangible value**.

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1. Assessing the current state of your organization

This phase includes:

- **business process mapping**: identify key workflows and operational procedures, with particular attention to tasks that are repetitive, manual, or subjects to errors.
- **Digital assessment**: evaluate the extent to which digital tools and technologies are currently adopted and integrated into business operations.
- **Data readiness analysis**: review the availability, quality, and the accessibility of data between the different departments to determine whether they are suitable for AI applications.
- **Organisational culture**: assess the organisation's openness to innovation and change, including the level of awareness, enthusiasm or resistance towards the adoption of AI.

2. Identifying Areas Where AI Can Add Value

Once you have a clear understanding of the current state, the next step is to:

- **Identify operational critical points**: highlight inefficiencies, bottlenecks or high-cost areas that could benefit from intelligent automation or optimisation.
- **Explore AI use cases**: identify specific areas where AI could be effectively applied, such as customer service automation, document processing, predictive analytics, or personalised marketing.
- **Prioritise initiatives** : determine which AI interventions can deliver quick, tangible results and which require long-term investment and change management.
- **Align your AI strategy with business objectives**: ensure that AI initiatives are directly aligned with the organisation's broader strategic objectives, such as improving efficiency, enhancing customer experience, promoting innovation, or supporting sustainability

To better understand how this objective can be translated into practice, consider the following examples drawn from the Case Library:

1. In Ireland, Profix identified inefficiencies in its quotation process and used this insight to explore AI solutions.
2. In Norway, Savvie helped small food businesses reduce waste by analysing real-time sales data, demonstrating how AI can address operational pain points.

Phase 2: Technology Selection and Planning

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At this critical stage, SMEs focus on identifying the AI technologies most suited to their business needs and developing a strategic roadmap for their implementation. The goal is to align AI capabilities with organisational objectives, ensuring a clear roadmap from selection to implementation.

Key activities:

- researching AI tools and platforms;
- defining objectives and KPIs;
- assessing costs and infrastructure.

To ensure successful AI adoption, SMEs must take a structured and practical approach to selecting technologies and preparing for their implementation. This phase focuses on aligning AI capabilities with business needs through collaborative planning and assessment.

- **Organise a technology scouting workshop**: bring together managers heads to discuss critical issues and explore AI solutions. Use this session to gather cross-functional input and identify priority areas for automation or enhancement.
- **Create a requirements checklist:** define essential features the AI solution must have, such as:
  a) integration with existing CRM systems;
  b) support for multilingual input;
  c) cloud-based deployment options;
  d) GDPR compliance
- **Compare vendors using a scoring matrix:** evaluate shortlisted vendors based on key criteria:
  a) cost (licensing, setup, maintenance);
  b) support (availability, responsiveness)
  c) scalability (ability to grow with your business)
  d) ease of use (user interface, training needs)
- **Define KPIs for AI success and implementation:** set measurable goals to track performance, such as:
  a) reduce customer response time by 30%;
  b) increase lead conversion rate by 20%;
  c) automate 50% of routine data entry tasks

- **Draft a pilot timeline:** develop a roadmap for testing the AI solution, including:
  a) Key milestones (e.g., tool selection, integration, testing);
  b) assigned responsibilities for each phase;
  c) feedback for continuous improvement

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To better understand how this objective can be translated into practice, consider the following examples drawn from the Case Library.

1) In Croatia, Hypefy automated influencer marketing by using AI, streamlining campaign management and securing significant funding.
2) In France, Galadrim developed custom AI solutions tailored to client needs.

Phase 3: Implementation and Integration

This phase focuses on deploying selected AI tools and embedding them into existing business workflows. The goal is to ensure smooth adoption, effective usage, and seamless integration with current systems.

- **Pilot AI solutions** and iterate based on feedback: launch a pilot project in a specific department—e.g., using an AI chatbot in customer service. Collect feedback from users and customers, then refine the chatbot's responses, interface, or escalation logic based on real-world usage.
- **Train staff** to use AI tools effectively: organise hands-on training sessions to help employees understand and use the AI tools. For example:
    a) teach sales teams how to interpret AI-generated lead scores;
    b) show HR staff how to use AI for CV screening;
    c) guide operations teams on how to monitor predictive maintenance alerts.
- **Ensure compatibility with existing systems** (e.g., CRM, ERP): work with IT to integrate AI tools with current platforms. This might include:

a) connecting the AI chatbot to the CRM to access customer history;
b) ensuring the AI analytics tool can pull data from the ERP system;
c) testing connections and data flow between AI and legacy software

To better understand how this objective can be translated into practice, consider the following examples drawn from the Case Library:

1) in Austria, Craftworks implemented predictive maintenance in manufacturing, reducing downtime.

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2) In Croatia, Rimac Technology used AI to monitor machinery and prevent failures, improving production efficiency.

Phase 4: Monitoring and Optimisation

In this phase, SMEs focus on tracking the performance of AI tools and continuously refining them to maximise business impact. The goal is to ensure that AI solutions remain effective, relevant, and aligned with evolving needs.

- **Set-up dashboards to monitor KPIs:** use tools like Power BI, Google Data Studio, or Tableau to visualise key metrics such as customer response time, lead conversion rates, or system uptime. Dashboards help teams quickly identify trends and issues.
- **Schedule periodic review meetings:** hold regular meetings with stakeholders to assess AI performance, discuss results, and decide on necessary adjustments. Include representatives from operations, IT, and management to ensure a holistic view.
- **Collect user feedback via surveys or interviews:** gather insights from employees and customers who interact with the AI tools. Use short surveys or one-on-one interviews to understand usability, effectiveness, and areas for improvement.
- **Upgrade AI models with new data every quarter:** update machine learning models using recent data to improve accuracy and relevance. For example, upgrade a recommendation engine with recent customer behaviour data or update a predictive maintenance model with new sensor readings.
- **Document lessons learned and update internal procedures:** keep a record of what worked, what didn't, and why. Use this documentation to refine internal workflows, training materials, and future AI implementation strategies.

To better understand how this objective can be translated into practice, consider the following examples drawn from the Case Library:

1) In Spain, Clictic developed internal AI dashboards and assistants, continuously improving them based on user input.
2) In Estonia, Lingvist personalised language learning using AI, adapting content in real-time to user performance.

Phase 5: Compliance, Ethics and Scaling

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In this phase, SMEs focus on ensuring that AI tools are used ethically, legally, and responsibly, while also preparing for future expansion. The goal is to build trust, reduce risks, and create a foundation for scalable AI adoption.

- **Conduct a GDPR audit using a checklist:** review data gathering practices to ensure compliance with privacy regulations. Use a checklist covering:

a) Data minimisation;
b) explicit user consent ;
c) right of access and cancellation ;
d) secure data storage and transfer.

- **Draft an AI ethics policy with staff and stakeholder:** collaborate with internal teams to define principles for responsible AI use, such as:

a) transparency in decision-making;
b) fairness and non-discrimination;
c) accountability for automated outcomes.

- **Create a risk matrix for AI use cases:** identify potential risks and mitigation strategies. For example:

a) bias in hiring algorithms, implement fairness audits;
b) data leakage in customer analytics, enforce encryption and access controls;
c) over-reliance on automation, maintain human oversight.

- **Plan for scaling AI across departments:** evaluate which areas could benefit next from AI, such as:

a) Finance (e.g., fraud detection)
b) Marketing (e.g., campaign optimisation)
c) Logistics (e.g., route planning)

- **Engage external experts for validation and certification:** consult legal advisors, data protection officers, or AI ethics consultants to validate your approach. Consider certifications or third-party audits to build credibility and trust.

To better understand how this objective can be translated into practice, consider the following example drawn from the Case Library:

1) In Italy, Exeo Lab used AI to streamline EU project management while maintaining **transparency and accountability.**

Specific Pathways for Sectors

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Commerce, Marketing & Sales SMEs

Phase 1: Assessment and Readiness

- Map your processes: draw a simple diagram of your sales funnel, customer interactions, marketing campaigns, and order handling.
- Identify critical points: note where customers are dropping out of the process (e.g., abandoned carts, low response rates, high churn).
- Review your digital tools: list what you already use (CRM, e-commerce platform, social media tools, email marketing).
- Examine your data: check if you collect customer emails, purchase history, web analytics, and how accessible they are.

Tip: Hold a short team meeting and ask: “Where are we losing the most customers or sales?’

Phase 2: Technology Selection and Planning

- Choose a priority area: for example chatbots for customer support, automated product recommendations, or campaign automation.
- Look for 2–3 tools that fit your size and budget (many SaaS tools are low-cost).

Examples include:

- **Chatbots**: Tidio, Intercom, Drift
- **Recommendations/personalisation:** Shopify AI, Clerk.io, Salesforce Einstein
- **Campaign automation:** HubSpot AI, Mailchimp AI, ActiveCampaign

- Make a checklist: integration with CRM/e-commerce, GDPR compliance, monthly costs, ease of use.
- Set clear targets and KPIs: well defined KPIs help SMEs assess if IA is generating value. These objectives must be specific, realistic and in line with the company's strategic objectives.

  Sales and growth

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- Increase online sales by 15% in 6 months
- Improve conversion rate from website visitors by X%
- Grow average order value by Y%
- Expand into one new market segment within 12 months

  Customer experience
- Cut customer response times by 30%
- Raise customer satisfaction scores by X points
- Reduce customer complaints by Z%
- Increase customer retention / repeat purchases

  Marketing performance
- Boost email open/click-through rates
- Improve return on ad spend by X%
- Achieve Y% more qualified leads from campaigns
- Reduce customer acquisition cost

  Operational efficiency
- Automate X% of routine administrative tasks
- Reduce manual data entry errors by Y%
- Lower supply chain or logistics costs by Z%
- Save X hours of staff time per week through AI tools

  Innovation and workforce development
- Launch at least one AI-driven service/product within 12 months
- Train 100% of staff in responsible AI use by year-end
- Increase employee productivity by X% through AI assistance

- **Plan a pilot** on a single channel (website, email, or social media).

Phase 3: Implementation and Integration

- Run your pilot project:
  - add a chatbot to your website for frequently asked questions;
  - try an artificial intelligence tool for personalised recommendations via email.

- **Train your staff**: 1-2 hours to learn how to read dashboards, interact with lead scores, or edit chatbot scripts.

- **Check integrations**: ensure the tool connects to your CRM or e-commerce system. Tools to consider include:

  - **E-commerce plugins:** Shopify AI apps, WooCommerce AI assistants

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- **Social media AI tools:** Meta Ads Manager AI, Google Ads Smart Campaigns
- **CRM add-ons:** Zoho CRM AI, Pipedrive Insights

Tip: ask staff to use the tool and report what works and what is confusing..

Phase 4: Monitoring and optimisation

- Track your KPIs: monitor conversions, response times and campaign ROI using a simple dashboard (Google Data Studio, Power BI).
- Get customer feedback: add a single-question survey after using the chatbot or email campaigns.
- Update and refine: regularly enter new data into the system (seasonal sales, customer trends).

- Use Expanded KPIs to measure impact, split by sectors including

  Sales and marketing
  - ROI per campaign (revenue vs. cost)
  - Abandoned cart recovery rate
  - Conversion rate from leads to customers
  - Email open and click-through rates

  Customer service and experience
  - Average handling time for queries (AI vs. human support)
  - First-contact resolution rate (how often issues are solved without escalation)
  - Promoter score "Would you recommend us?"
  - Customer satisfaction after chatbot or support interaction
  - Percentage of queries successfully handled by AI tools

  Operations and efficiency
  - Reduction in manual work hours due to automation
  - Error rate before vs. after AI implementation
  - Time saved in routine processes (e.g., order handling, reporting)
  - Inventory or supply chain optimization improvements

  Retention and growth
  - Repeat purchase rate / customer retention rate
  - Lifetime customer value
  - How many customers stop buying
  - New market segments reached (via personalized recommendations)

  Add a single-question survey after chatbot interactions or email campaigns (e.g., *"Did this solve your problem?"* or *"Would you recommend us?"*

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- **Expand gradually**: if the pilot project works, apply AI to price optimisation, social media ads or customer loyalty campaigns.

Phase 5: Compliance, Ethics, and Scalability

- **Check GDPR compliance**: ensure customer data is collected with their consent and stored securely.
- **Be transparent**: inform customers when they are talking to a chatbot.
- **Avoid bias**: verify that AI does not unfairly exclude certain customer groups.
- **Plan for scalability**:
  - Move from a single-channel pilot (e.g., website chatbot) to omnichannel AI marketing (social media, WhatsApp, in-store kiosks).
  - Expand from basic automation to predictive AI (demand forecasting, dynamic pricing).
  - Integrate with loyalty programmes and customer segmentation systems.
  - As the SME grows, explore data enrichment tools such as Clearbit or Segment.

Example: Scaling AI in a small online retailer

- **Pilot:** SME starts with a **website chatbot** to answer FAQs and cut email load.
- **Expansion:** chatbot is extended to **social media and WhatsApp**, creating an omnichannel customer support system.
- **Prediction:** AI is then used for **demand forecasting** and **dynamic pricing**, helping the SME stock smartly and adjust discounts in real time.
- **Integration:** finally, the system connects with the **loyalty programme**, sending personalised offers that boost repeat purchases.

Result: A simple pilot evolves into a scalable AI strategy that drives sales growth and customer retention.

Tip: draft a simple one-page 'AI Use Policy' for staff, covering data protection and customer trust.

AI Toolbox: Commerce, Marketing & Sales

Category	Tool Examples	Use Case

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Chatbots	Tidio, Intercom, Drift	Customer support, FAQs, lead capture
Recommendations & Personalisation	Shopify AI, Clerk.io, Salesforce Einstein	Product recommendations, tailored emails
Campaign Automation	HubSpot AI, Mailchimp AI, ActiveCampaign	Email marketing, campaign scheduling
Social Media & Ads	Meta Ads Manager AI, Google Ads Smart Campaigns	Ad targeting, ROI optimisation
CRM Enhancements	Zoho CRM AI, Pipedrive Insights	Lead scoring, sales insights
Data Enrichment & Scaling	Clearbit, Segment	Customer segmentation, scaling campaigns

Key points

- Start with a clear sales or marketing problem (e.g., abandoned shopping carts).
- Use simple, low-cost artificial intelligence tools before investing in complex systems.
- Involve sales and marketing staff from the outset.
- Monitor results and expand gradually.
- Keep customers informed and build trust.

SPECIFIC SECTORS TO BE COMPLETED

- **Industry and Manufacturing - FIPL**
- **Digital and Information - IDL**
- **Technology Healthcare and Life Sciences - CIB**
- **Business and Professional Services - BFI**
- **Finance and Fintech - POSTAL3**
- **Logistics and Hospitality - CALLIDUS**

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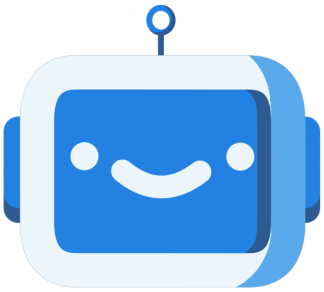

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