1 What is Generative AI for Sales?

There isn't a revenue leader out there that isn't trying to make their teams more efficient: equipping them to sell better, faster.

Driving efficiency is a cornerstone to scaling sales engines. The more time sales teams can spend interacting with customers, the more their pipeline will benefit. However, great sales also requires process alignment and a discipline that aligns solution value to the customer's business challenges.

While we have now moved into what some are calling the Artificial Intelligence era, there are plenty of organizations who are still trying to determine how best to incorporate the vast benefits into their sales engine while maintaining the value of human knowledge and execution. An easy way to incorporate AI in your sales engine is through Generative AI.

Generative AI

is a category of artificial intelligence (AI) models that are designed to generate new content, such as images, text, music, or even entire virtual environments, based on patterns and examples learned from existing data.

AI tools like ChatGPT can expedite and automate activities like discovery, call prep and email follow-up. **But, as with any technology, a strong understanding of sales fundamentals is necessary to use them to your advantage.**

The tool may summarize your call for you, but did it capture the high-level business issues correctly? Can it distinguish between technical issues and those business problems? Will it tell you how to access the Economic Buyer? It's important that sales leaders help their teams drive efficiency while still focusing on solid sales fundamentals. **Sales leaders should define clear processes around these tools** to ensure they enhance, rather than distract from, effective sales execution.

2 Helping Your Teams Use AI Effectively

The key to using developing tools like Chat GPT effectively is writing great prompts. While it can be a great asset when trying to research companies, summarize meetings or even craft great follow-up emails, the AI assistant will only output information equal to your input. Ensure your team is crafting great prompts to help the technology return ideal results.

In our webinar with Matt Payne of Sales Boost Consulting, he shared these three steps for how to write the best AI prompts for sales:

Step 1: **Determine the role you want AI to play.**	**Assistant:** Find research on [Insert Topic] **Idea Generator:** Generate ideas for [Insert Topic] **Editor:** Make this text shorter and more clear [Insert Text] **Teacher:** Explain [Insert Topic] to me **Critic:** Present objections to my argument [Insert Argument]
Step 2: **Request the right tone.**	**Examples of possible tones to use in a sales context:** Persuasive, professional, firm, informative, confident, friendly, or technical. Also try combining multiple tones, such as persuasive professional.
Step 3 **Instruct the tool on how to present the information.**	**Possible formats include:** Report, email, table, narrative, script, roleplay, social media post, or bulleted list.

There are many tasks in the sales process that AI can help expedite or automate. Below are four tasks that new generative AI tools can help with and sample prompts for each:

Research

Use AI to compile data and background on prospects, competitors and industries.

Sample AI Prompt: "What are the current trends, challenges, and opportunities in the [Industry Name] industry, and how might they impact companies like [Prospect's Company Name]?"

Role Playing

Use AI as a sales coaching tool by asking it to mimic real-world scenarios.

Sample AI Prompt: "I am a sales rep at <name of your company> trying to sell<your product>. You are the <title> at <name of business> and currently using <name of competitor>. I will cold call you and try to convince you to take a discovery or demo meeting with me. You should not be interested in learning more about <your product>. Give as many objections as possible."

Communication

Use AI to summarize meetings and draft outreach or follow-up.

Sample AI Prompt: "I recently had a productive sales call and have attached the transcript. Help me draft a follow-up email. I'd like the email to reflect key points we discussed during the call, ensuring it accurately captures the client's needs and concerns. Additionally, the email should outline the next steps we agreed upon. This will help in maintaining clarity and momentum in our sales process."

Brainstorming

Use AI to generate ideas for sales strategy and outreach.

Sample AI Prompt: "Using the information available on <company>, its executive leaders, and current challenges and opportunities in its industry, help me strategize ways to prospect into <company> to sell <X solution> that provides <X benefit.>"

3 Using AI to Support a Strong Sales Process

Tools won't make bad sellers great sellers. They may increase productivity, but it's still important for your teams to understand the fundamentals of great selling so they can use AI tools to be more efficient. Technology is only as valuable as its inputs.

If your sales team doesn't have a strong, repeatable process for executing a value-based sales motion, AI is likely to do more harm than good.

> "Think of AI like a player on your team. It's got skills, but it needs a coach to show it where to play and how to make the biggest impact."

Matt Payne
Founder
Sales Boost Consulting

Sales reps should maintain a curious mindset; research can set the context for their conversations and demonstrate initiative, but it's no replacement for a customer-led sales process that uncovers true internal pains and desired outcomes.

Consider how an understanding of your typical customer organization can guide the use of AI tools.

Rather than just requesting all background information on a company, reps can pose specific questions about the executive-level decision-makers that typically hold weight in your deals.

Remember that with AI tools, **more specific directives can often yield richer results.** Your team needs to understand who they are targeting as buyers and why before they can point AI in the right direction.

AI tools are still evolving. If you're a sales leader, you're probably already hyper-aware of the potential risk that AI could present if misused. Privacy and ethics concerns, data accuracy, and overreliance on technology can all hurt your sales momentum. To ensure AI tools are applied constructively, **leaders must give their organization a clear roadmap for how the technology fits into their overall sales strategy.**

Encourage reps to strike a balance between efficiency tools and personal relationship-building. Cultivate a culture around accountability and outcomes; AI is a tool for research and preparation, but not a replacement for elite sales execution. The human element of sales is, and will remain, the heart of our success.

Most of us are inundated with sales messages daily; only the messages best aligned with buyer needs will truly connect.

AI has the potential to empower sales reps to focus more on the human element and less on the tasks in between, but **this makes the enablement of great selling by leaders all the more crucial.**

> "The **most powerful thing you can do** is getting ready for the customer conversation before it happens **in a way that most people don't**."

Brian Walsh
Managing Director
Force Management

As a sales leader, you can provide a blueprint to ensure your team's AI utilization enhances your sales process. It starts with giving a clear idea of what excellence looks like in various elements of your sales process, and how AI can support your existing strategy.

Provide a great context for the use of AI tools by building out a framework so that everyone in your organization understands the use case for your product - the business problems your solution solves, the people who are typically invested in solving those problems, and the ROI your solution has provided in the past.
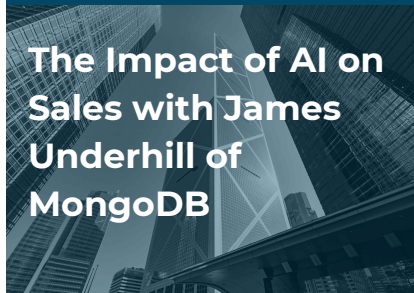
More AI Resources

ARTICLE ▶

Four Ways to Use Generative AI to Maximize Sales Rep Efficiency

PODCAST ▶

The Impact of AI on Sales with James Underhill of MongoDB

ARTICLE ▶

Sample Generative AI Prompts for Sales Teams

Your Partner in Sales Execution

Force Management has worked with sales organizations for over 20 years, helping them to build a sales discipline that drives results amongst an ever-changing technological landscape. As new tools emerge, we know **the fundamentals of great selling remain constant**. Our methodologies have resulted in bigger wins, greater quota attainment, more accurate forecasting and higher talent retention for hundreds of clients across industries including Cybersecurity, FinTech, Business Intelligence, and DevOps.

We partner with each sales organization to custom-tailor our signature methodologies to their solutions and the current landscape, helping them maximize their talent with a repeatable and aligned process that paves the way to growth.

START A CONVERSATION ▶

"Our team already had tremendous rock stars with tribal knowledge of how to win. Force Management helped us capture that knowledge so everybody has access and is trained on what Force Management calls a Value Framework. I call it our sales bible."
- Craig Lewis, CSO of Project44 during FM Engagement

SEE OUR RESULTS ▶