SBR Consulting

How to Use AI Effectively
with Sales & Marketing

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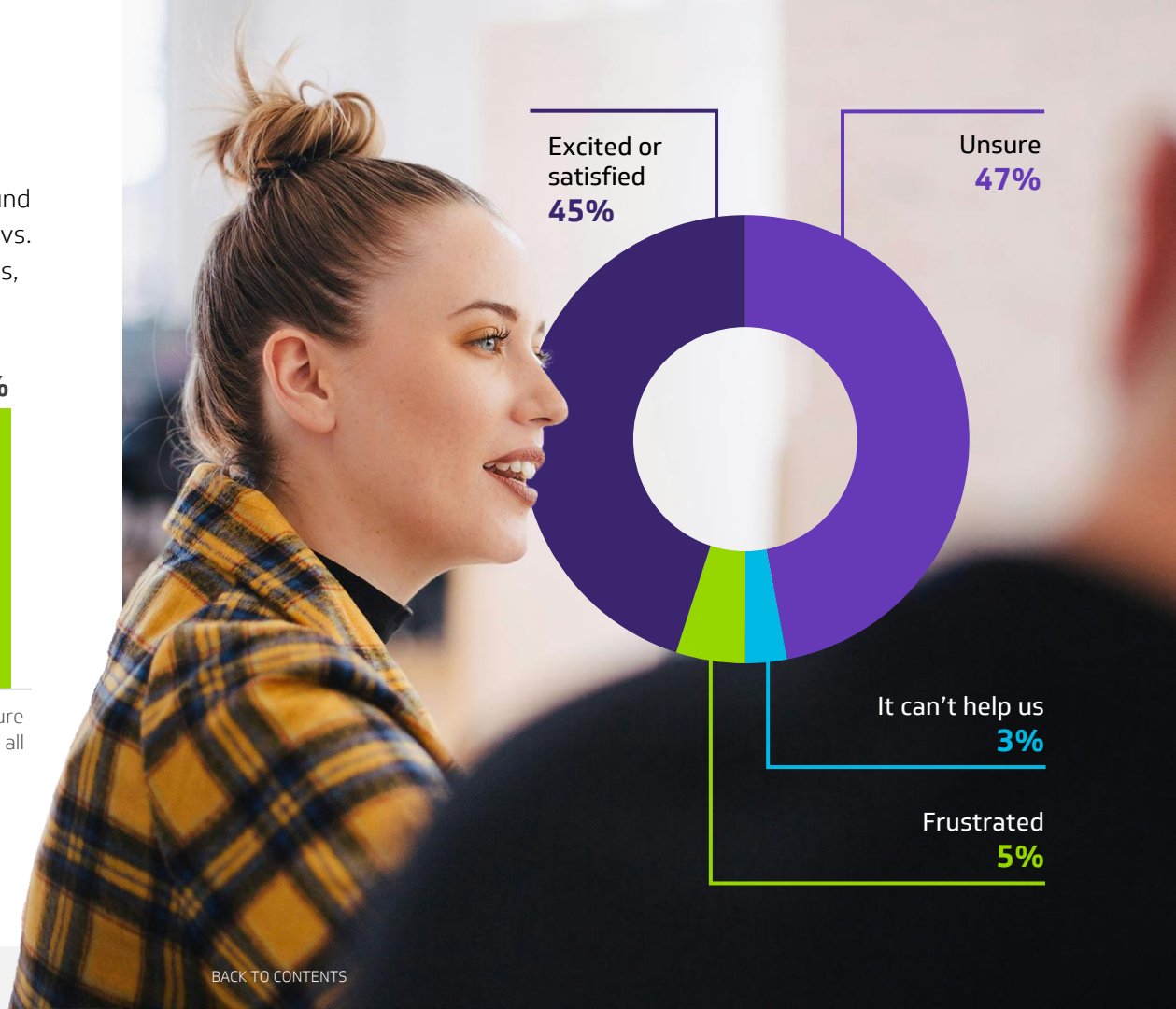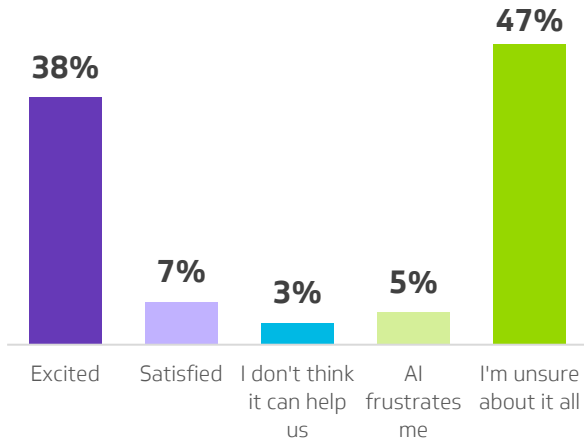
How to Use AI Effectively

with Sales & Marketing

You don't have to look into the chapters of science fiction novels anymore to see a new player on the scene of business – that of Artificial Intelligence (AI). In truth, AI has been with us for quite a while now, but its impact on business processes in the last decade has been tremendous.

AI stands at the forefront of innovation, promising to revolutionise the way we live, work, and interact with the world around us. We've seen it at work in the areas of customer service, business planning, administrative support, reporting, copywriting, GPS navigation, and more, but what specifically does it mean for the world of *sales and marketing*? And, more specifically, how can it help your team close more business and increase revenue?

What AI capability are you most excited about exploring for your sales team?

preparation
call summary
working smarter not harder
remove friction
metrics
tactically winning deals
research pain points
uncovering new insights
specific content
intelligence
client experience
risk analysis
follow up
easy
automation
time save
coaching
save time
call prep
integrated view
saving time
risk synthesis
do more with less
accuracy
consistency
time
speed
efficiency
sales colleague retention
better relationships
meeting recap
research
post call email gen
reminders
meeting notes
better win rates
not missing follow ups
productivity improvement
potential clients
admin time lowered

A recent SBR Consulting survey of clients found most organisations were equal parts excited vs. uncertain about the use of AI with their teams, with not much in the middle:

38% Excited
7% Satisfied
3% I don't think it can help us
5% AI frustrates me
47% I'm unsure about it all

Excited or satisfied **45%**

Unsure **47%**

It can't help us **3%**

Frustrated **5%**

What is AI, and how did we get here?

At its core, AI refers to the simulation of human intelligence processes by machines, particularly computer systems. These processes include learning (the acquisition of information and rules for using the information), reasoning (using rules to reach approximate or definite conclusions), and self-correction.

In simple terms, AI enables machines to mimic cognitive functions such as problem-solving, decision-making, and language understanding, that have been traditionally associated with human intelligence.

There are different types of AI, depending on how you define them. **Narrow AI** is programmed to conduct a specific task, or limited range of tasks, such as virtual personal assistants (Siri, Alexa, etc.) or chatbots who can recognise pre-programmed questions or keywords. **General AI**, the next evolution of AI, adds a layer capable of understanding, learning, reasoning, and adapting to diverse tasks and situations.
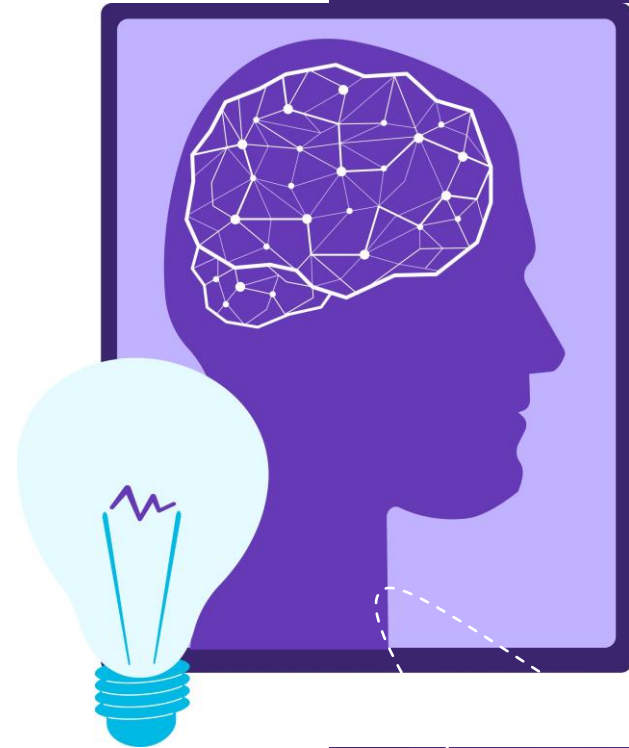
Within the broader categories of AI, there are several subsets or components:

→ **Generative AI** refers to a new class of AI that enables machines to generate new content, such as images, text, audio, or even video, that is similar to or indistinguishable from human-created content. Unlike traditional AI systems that are programmed to perform specific tasks or analyse data, generative AI models are trained on large datasets and learn to generate original content by understanding and mimicking patterns within the data.

→ **Machine Learning (ML)** is a subset of AI that focuses on developing algorithms capable of learning from data and making predictions or decisions. ML algorithms improve their performance over time, as they are exposed to more data.

→ **Natural Language Processing (NLP)** focuses on enabling computers to understand, interpret, and generate human language in a natural and meaningful way. NLP algorithms power applications such as language translation and chatbots, enabling seamless communication between humans and machines.

These three specifically make up the core of many of the AI tools that have quickly become popular in the corporate world, for all the reasons stated above. According to a 2023 article by the Harvard Business Review, generative AI has already helped writers draft content and programmers write code, boosting their productivity by 50% or more. It can do the same for salespeople, they argue. [1]

What are some of the
limitations of AI?

While artificial intelligence can come close to simulating human thoughts and interactions, in the end, it's only technology. There have been concerns about accuracy, data, privacy, copyright, and other infringements as AI has so quickly burst onto the scene.

"AI should only be used to save time" recommends **SBR Consulting Managing Director Alan Morton.** "It certainly should not write your proposals for you. It should reduce the time taken to get to where you would have got to without it."

Alan Morton
Managing Director, SBR Consulting
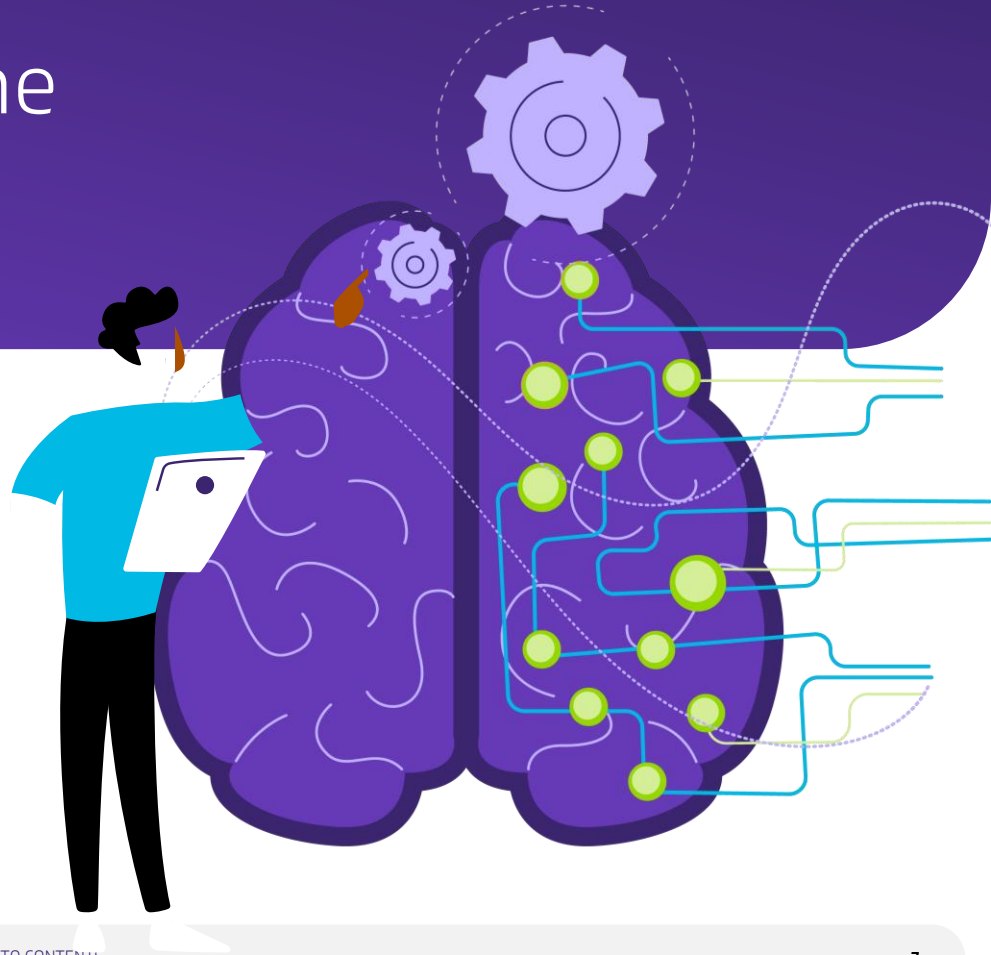
At SBR Consulting, some of the most common challenges heard from clients are:

Data Privacy and Security
By integrating AI into your CRM, safeguarding customer data and protecting it from data breaches becomes more important than ever.

Integration with Existing Infrastructure
AI integration can be complex and requires careful planning and execution.

Resistance to Change
Employees are hesitant to adopt new technologies, or unsure of the benefits of AI.

Data Quality
Poor-quality data or misinterpreted data can lead to inaccurate insights.

Cost and ROI
The cost of implementing AI and justifying the expense with a clear ROI can often be challenging.

In short, sales managers are likely thinking, *Is AI really going to make things better, or is it going to make it worse? We don't want to adopt something simply because it's interesting or exciting. We want to invest because it's going to make things better for our people.*

All valid points, says **Devang Agrawal, Founder of Glyphic**, an AI tool for sales teams. "One of the biggest challenges we've seen with the sales teams we've worked with is that each [piece of technology] feels like an additive tool. They don't integrate well with each other. And you're context-switching between a lot of tools."

Devang Agrawal
Founder, Glyphic
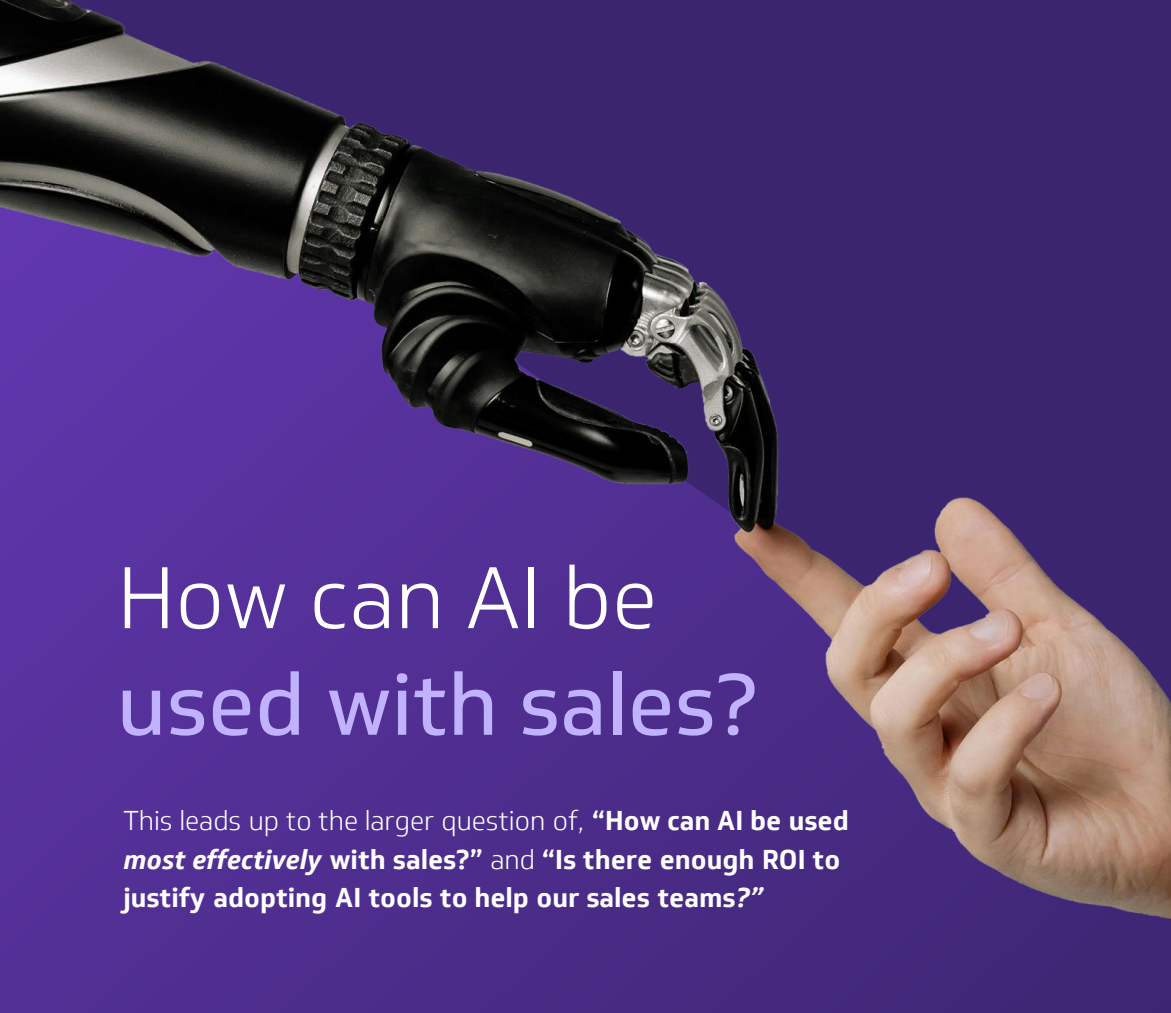
How can AI be used with sales?

This leads up to the larger question of, **"How can AI be used *most effectively* with sales?"** and **"Is there enough ROI to justify adopting AI tools to help our sales teams?"**

The simple truth is, despite its limitations, AI has the potential to revolutionise sales by providing a helping hand with some of the routine tasks and processes that keep salespeople stuck in the time-consuming mire of research, data entry, and communication and follow-up, just to name a few. First of all, you'd be hard-pressed to find a salesperson who doesn't complain about being buried in admin duties or data entry, says **SBR Consulting Director of Product Development Bill Bauer.**

"Hypothetically, sales reps working with AI effectively can work on more than 10 opportunities at a time, and can prepare for, and execute more than 15 meetings a week," Bauer says.

Bill Bauer
Director of Product Development,
SBR Consulting

A recent study by the research team at Gartner showed that:

49% of salespeople surveyed felt overwhelmed by the amount of technology required to do their jobs. This has a direct effect on productivity, Bauer of SBR argues, as salespeople who are underwater are **43%** less likely to hit their quotas. [webinar]

49%

[Click here to watch our Sales AI webinar]
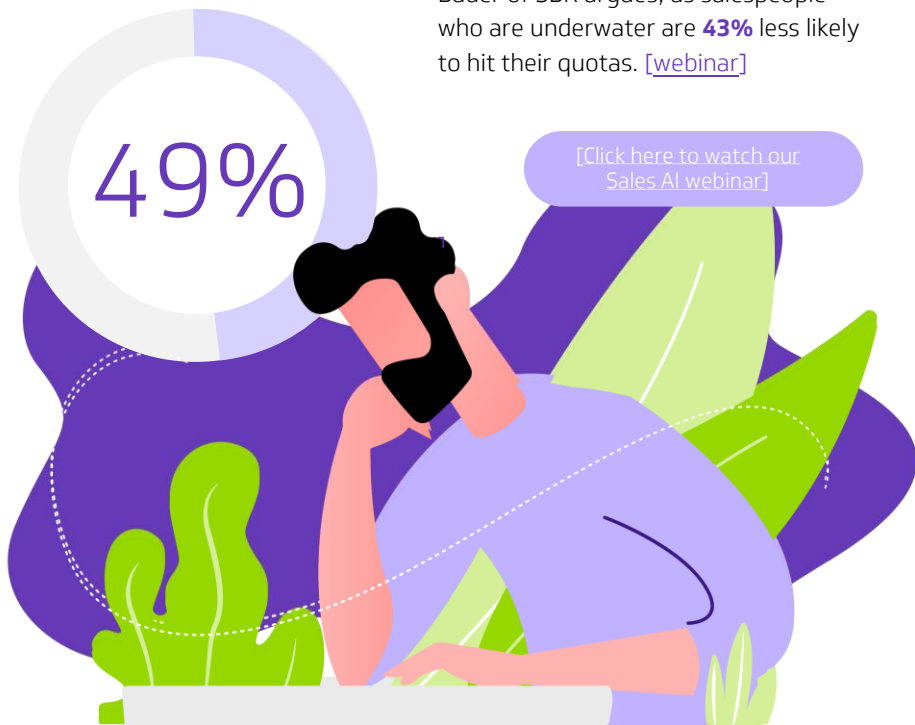
Indeed, a recent HubSpot survey found that only **37%** of sales professionals' time was spent actually interacting with clients – building connections with prospects, leads and customers – because of all the myriad administrative and lower-ROI tasks.

They also found that AI tools and automations were saving sales teams more than

2 hours

a day on average in meeting scheduling, scheduling, note-taking, editing and CRM data entry. [2]

So, what specifically can AI help sales teams with? Here are five areas to start.

See next page

① Call Prep

Customer pain point: "Salespeople don't know enough about my business and don't have enough relevant insights in their sales presentation."

Sales pain point: "It's challenging to prepare for calls effectively because it's so tedious and has to be done manually. I don't have hours to prep for one call."

Solution: AI can mine, collect, and deliver data on the prospect in less than a minute, so sales reps can have all the background they need at their fingertips.

Sample tools: Glyphic

② Call Notes

Customer pain point: "Poor or incomplete notes, creating clunky handoffs at each stage of the process. Every time a new human is involved, I have to repeat myself all over."

Sales pain point: "The SDR didn't leave enough notes I can understand in order for me to not have to ask an embarrassing amount of questions."

Solution: Integrated AI can join calls, take notes and automatically log them in a CRM. It can then automatically share that data with complex sales teams to ensure quality handoffs between SDRs, AEs, and customer service.

Sample tools: Gong, Glyphic, and Chorus

"Gartner says AI will free-up 27% of a sales rep's time in the future. AI shares highlights of your calls, what the follow-up points are, and also tell you the gaps," **says Lesley Ronaldson, VP of Sales EMEA at Gong**

Lesley Ronaldson
VP of Sales EMEA, Gong
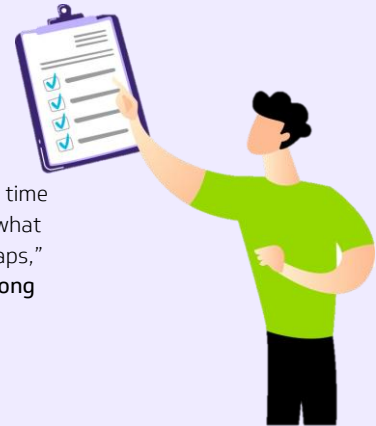
3 Client Follow-Up

Customer pain point: No follow-up, late follow-up or canned, generic follow-up emails.

Sales pain point: Not enough time or energy to keep up with client follow-up and niceties before having to move onto the next call.

Solution: AI can do everything from generating excellent client follow-up drafts in 30 seconds or less (standalone AI tools), to actually scanning the call notes and generating sample follow-up emails (integrated AI tools).

Sample tools: Gong, Glyphic, and Chorus

> "With the teams we've deployed this with, we're seeing a 15-20 percent increase in their conversion rate by having better emails, better call preparation," **says Agrawal of Glyphic.**

> "Since using AI, our win rates have gone up by 18% and it's shortened our sales cycle by 11% because time kills deals. They could be speaking to a competitor straight after us." **says Ronaldson of Gong.**

4 CRM Data Entry

Customer pain point: Incorrect info or gaps in the sales process due to incorrect information.

Sales pain point: Time-consuming to keep updated.

Solution: As mentioned, AI can automatically log emails, calls, and meetings, reducing the need for manual entry, but they can also help keep CRM data up to date by identifying and correcting inaccuracies.

- **Predictive Analytics:** AI algorithms can analyse historical data to score leads based on their conversion likelihood, helping salespeople focus on promising opportunities.

- **Behavioural Insights:** AI can track and analyse customer behaviours to identify high-intent leads.

- **Personalised Customer Recommendations:** AI can suggest the best next actions, such as which products to recommend or the optimal time to reach out, based on customer data and past interactions.

Finally, **AI** can streamline sales processes by automating routine tasks such as follow-up reminders, contract management, and order processing.

Sample tools: Salesforce Einstein, Ebsta, and Glyphic

> "Historically, sales people don't like CRMs," **says Bauer of SBR.**
>
> "They don't see it as something that helps them win deals. They see it as something that helps their boss know what they're doing, and it's not helping them. So, anything that reduces the friction that CRM data entry creates is hugely helpful. And what the sales leadership needs is visibility and an accurate forecast."

5 Coaching

Customer pain point: Room for improvement in the sales presentation

Sales pain point: Salespeople needing more coaching from their leaders. Sales leaders context switching, jumping from sales call to sales call or getting paraphrased updates on the status of an individual's pipeline.

Solution: Integrated AI can scan the data and report succinctly and objectively what are the main points of the deal, the risks associated and potential bottlenecks. It lets leaders know where the opportunities for improvement are so they can coach their sales teams more effectively.

Sample tools: Ebsta, Chorus, and Clari

"As someone who coaches salespeople professionally, the first thing we look for is their critical success factors (CFS) or sales ratios," says **Southwestern Consulting Partner and Sales Coach Gena Parker**. "It can be difficult if they haven't been keeping track of them or are unaware of their own patterns – the more data, the better we can coach. This is definitely an area where technology and AI can help."

Gena Parker
Partner and Sales Coach,
Southwestern Consulting

"One of my favourite things to do is when an AE is in the business, after six months, I'll say, 'Hey, let's watch yesterday's call and let's watch your first-ever call in Gong.' It's night and day, and great for them to see how much they've grown." **says Ronaldson of Gong.**

How can AI be used with Marketing?

It's not just sales that can benefit from AI. It can play a crucial role in aligning marketing and sales teams in complex B2B buying cycles by **fostering collaboration**, **improving communication**, and **streamlining processes**.

"By leveraging AI to align marketing and sales efforts, organisations can create a more cohesive and effective go-to-market strategy, ultimately leading to improved customer experiences, higher conversion rates, and increased revenue."

Teresa Allan
Managing Partner
Magnus Consulting

AI helps connect the dots between the teams, surfacing critical insights that should help reduced the sales cycle. How?

Enhanced Customer Insights
AI can analyse customer interactions across various touchpoints to provide deeper insights into customer needs, pain points, and preferences. These insights help both marketing and sales teams tailor their approaches and messaging to better address customer concerns and drive engagement.

Unified Data
AI can integrate data from various sources, providing a shared data repository allows both marketing and sales teams to have a consistent understanding of the customer journey, ensuring that both teams are working with the same information and insights.

Improved Lead Scoring and Qualification
AI-powered lead scoring models can assess and rank leads based on their likelihood to convert. By providing accurate and data-driven lead scores, AI helps ensure that marketing and sales teams prioritise the right leads, reducing friction and improving the efficiency of the handoff process.

Enhanced Personalisation
AI can deliver personalised content and recommendations to prospects at different stages of the buying cycle. Marketing can use AI to tailor campaigns and messages, while sales can leverage these insights to engage with prospects in a more relevant and meaningful way, ensuring a seamless transition from marketing to sales.

Real-Time Analytics and Feedback
AI can provide real-time analytics and feedback on marketing and sales activities. This continuous feedback loop allows teams to quickly identify what's working and what's not, enabling them to make adjustments and improvements on the fly. Real-time insights help both teams stay agile and responsive to changing customer needs.

Examples of
AI Sales Tools

Salespeople have been using popular tools like Salesforce, HubSpot, LinkedIn Sales Navigator, ZenDesk Sell, or ZoomInfo for years to help with CRM management, task automation, sales forecasting, lead prospecting, and more, with Salesforce arguably being the giant in the space.

Determining the best or most widely used tools can vary depending on industry, company size, and individual preferences. However, three of the more popular AI tools for sales and CRM are Salesforce, Outreach, and Chorus. Samples of other tools emerging in the space specifically for the sales team niche include **Gong**, **Clari**, **Ebsta,** and **Glyphic**.
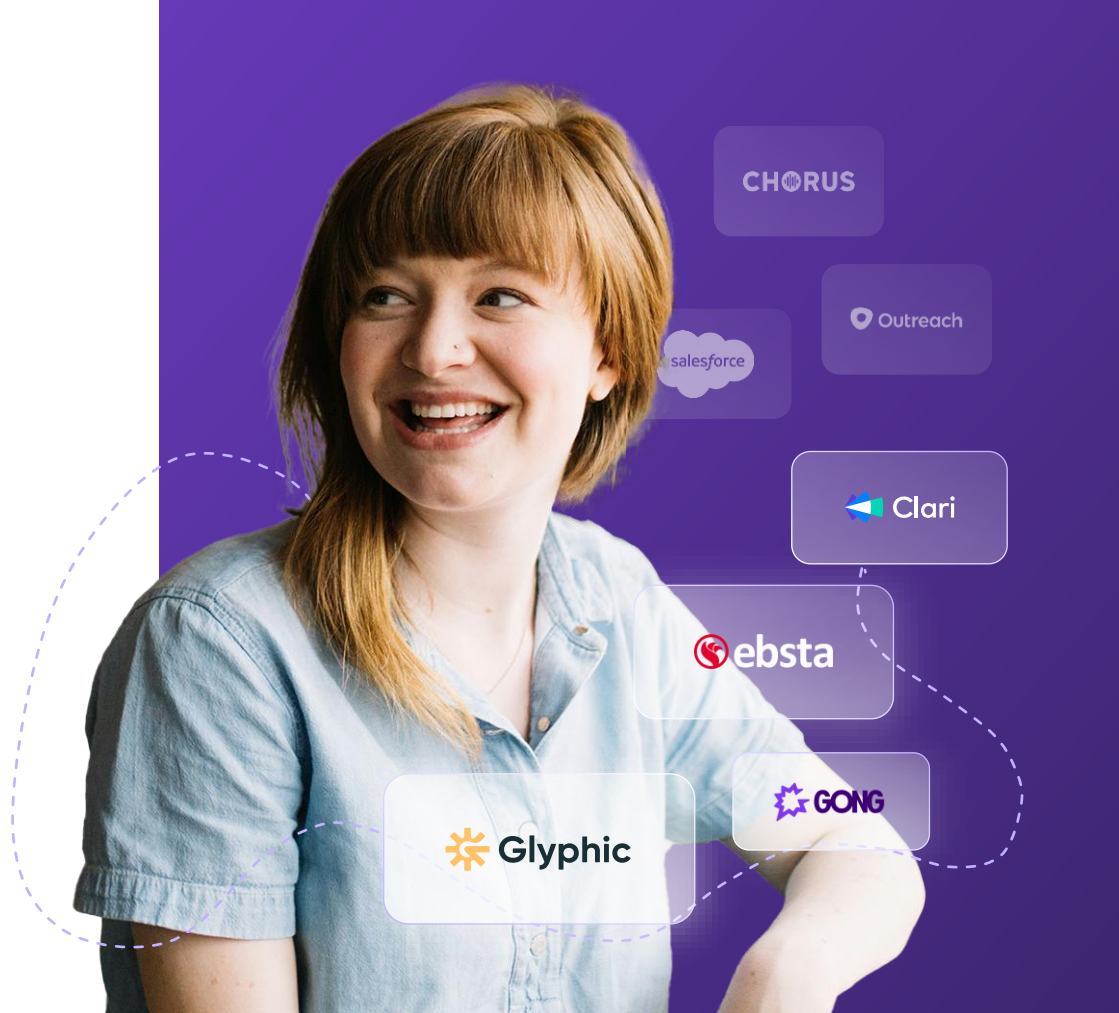
Clari

Clari provides a comprehensive view of revenue operations, helping sales teams manage their entire sales funnel with real-time insights and predictive analytics. It also offers detailed pipeline visibility and health scoring, allowing sales teams to identify risks and opportunities promptly. Like other tools, Clari automatically captures and logs sales activities such as emails, calls, and meetings, reducing the administrative burden on sales reps. One of Clari's more unique selling points is its focus on revenue intelligence, providing end-to-end visibility into sales processes and performance. It is also well-known for its advanced AI-driven forecasting capabilities, offering unparalleled accuracy in revenue predictions.

Ebsta

Ebsta integrates with email and calendar systems, ensuring that all communications are tracked and linked to the right CRM records and provide a complete picture of customer engagement. It provides insights into customer engagement by analysing email and meeting data. Ebsta's unique engagement scoring algorithm helps sales teams understand the strength of their customer relationships and act accordingly. As with other tools, Ebsta helps increase sales productivity by automating data entry and providing alerts for follow-up actions. It offers analytics to understand pipeline health and predict deal outcomes, helping sales teams prioritise their efforts effectively.

Gong

Gong is another prominent conversation intelligence platform that is widely used. Its AI-powered capabilities, including call recording, conversation analytics, and deal forecasting, make it a valuable tool for sales teams looking to gain actionable insights from their sales calls and meetings.

Glyphic

Glyphic automatically transcribes sales calls, making it easy to review and analyse interactions. Glyphic's primary focus on conversational analytics and "sentiment analysis" sets it apart, offering deep insights into the quality of sales interactions. It also specialises in analysing conversations between sales reps and clients to extract actionable insights and improve sales techniques. The tool provides real-time feedback and coaching suggestions based on the analysis of sales conversations.
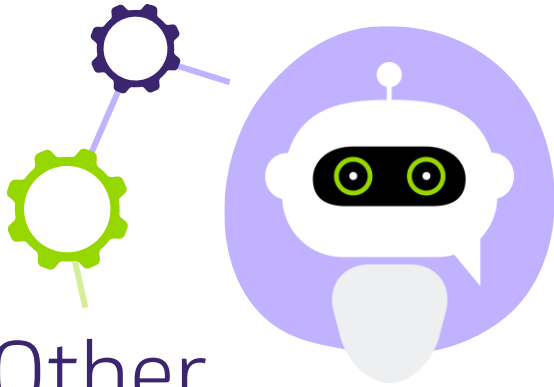
Other
Useful Tools

Here are some other tools and tips to consider when exploring the world of AI technology and prompts, many of which are aimed at the sales communication space:

→ AI can be used as a search bot on your website or integrated into your internal systems and IP.

→ If your teams use AI regularly, it's worth having a joint account with **OpenAI Playground** to share insights – this uses tokens to pay calculated on prompts inputted.

→ AI can act as a critical friend to inspire ways to repurpose content. For example, **TextFX by Google** can assist you (but not replace you).

→ **Hemingway Editor** can analyse the readability of your content – how easy your content is to digest.

→ **{Structured} Prompt** can help you create complex structured prompts for Chat GPT. For example: What's the task you want AI to perform, the particular reader it's for, the persona and perspective it's for and from, how you want the format of the response, and the purpose or goal intended?

→ **Custom GPT** can create your own AI bot like ChatGPT with your business language and branding.

Which AI-sales tool is right for your team?

The previously mentioned tools are only samples of AI-oriented sales tools – this is certainly not an exhaustive list. Determining which tool is right for you depends on your area of greatest need, starting with **"What specific pain points or challenges are we looking to address with an AI-based sales tool?"**

You also want to **consider the level of integration with existing systems**, such as your current CRM platforms and marketing automation tools. Seamless integration is essential for maximising the effectiveness and efficiency of an AI-based tool.
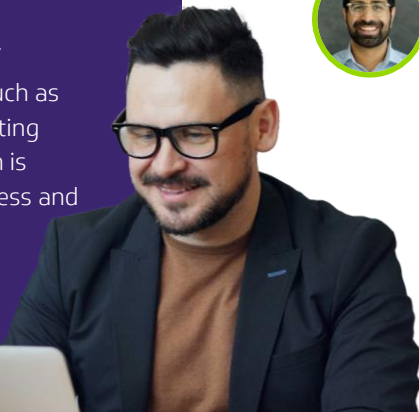
"We want to make sure AI is actually adding value and being as integrated as possible into the tech stacks that people are working with already," notes Devang Agrawal of Glyphic.

"I think the entire benchmarks of productivity of sales teams are going to change because AI is going to make the sales teams so productive."

Devang Agrawal
Founder, Glyphic

Other questions to consider:

- How does the AI-powered functionality work, and what algorithms and techniques are used for data analysis/prediction?

- What types of data sources does the tool use, and how does it ensure data accuracy and privacy compliance?

- What level of customisation and personalisation does the AI tool offer?

- How does the AI tool track key performance metrics and ROI, and what reporting and analytics capabilities are available?

- What level of training and support is provided to ensure successful adoption and utilisation of the tool?

Lastly, evaluate the total cost of ownership (or TCO) of the tool, including upfront implementation costs, licensing fees, and ongoing maintenance expenses. Consider the ROI potential of the tool in terms of increased sales productivity, improved conversion rates, and revenue growth to justify the investment.

How to Get Your Sales Team on Board with AI

OK, so if you're looking to get started with AI for your sales team, how do you get your sales team on board? Salespeople are creatures set in their ways and methods, so how do you get even the most technology-hesitant to embrace AI?

1 **First, sell the value.** Start with the "why," or the value that the new tool has – namely, the time it's going to save them. Something like, "we've heard several of you mention that you don't have time to enter all your CRM data correctly and keep up with your call quotas. We are piloting something to make that a lot easier – a tool that will automatically record your call data and crawl the conversation for detailed sales notes. There's a simple one-hour training session next week that will show you how to use it." Now you have everyone's attention.

2 **Get a few early adopters on your team to practice it and provide in-house testimonials.** Pick 2-3 of your sales team members to be pioneers of the new tool and report back. In the example above, you might say, "Carl, Becky, and Felipe have been using it for a month and are reporting that it's saving them as much as four hours each week." Let FOMO do its work.

3 **Let the leaders set the example.** Ensure that your leadership team gets early access to the tool, and is using it and modeling the behaviour. The sales team will follow the leader, and it makes it easier for managers to roll out the tool and ensure everyone knows how to use it.

4 **Have group training on the software.** How many trainings are needed? As many as it takes. Don't just announce the technology has arrived, or that "the cheese has moved" and provide sales members with a demo license and email. Consider having an admin or someone in sales support to be the designated point person on staff for any AI-related questions. It takes time, but the productivity is worth it.

5 **Provide results.** If adoption is still lagging 3-6 months in, do an audit of the producers who are using the tool and show the value in the numbers. It's easy to tell who is closing an extra 2-3 deals per week or logging 15-20 extra outbound calls due the efficiencies AI can provide them. To really make it sticky, do a one-year anniversary review from when you purchased the tool or system and showcase the numbers. The team won't be able to imagine a time before they were using the tool, and it makes confidence in rolling out future technologies easier.

CONCLUSION

# In summary, AI is an exciting new landscape that isn't going away any time soon.

Sales & marketing teams that embrace its time-saving components will be the first to see their productivity skyrocket and revenue rise as the technology behind the intelligence gets better and better. Like any other area of learned delegation, many of the long-standing pain points of sales & marketing can now be outsourced (or in-sourced) to these embedded tools, with a wide variety of choices and variations to choose from.

For more information, listen to this **complimentary webinar** on:

How to Leverage AI in Your Sales Process

Wondering how AI may be able to help your sales & marketing teams, or how to maximise your sales processes overall? SBR Consulting can help!

Click here to get in touch!
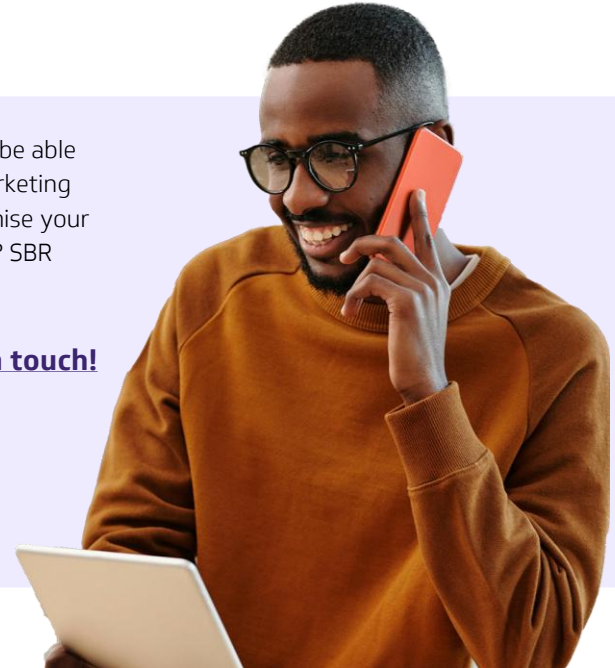
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