PRACTICAL WORKBOOK / SALES

# AI FOR SALES

From research to the next step.

01
**RESEARCH**

02
**CONVERSATION**

03
**DECISION**

METHODS / EXERCISES / EDITABLE WORKSHEETS

A complete English edition. Individual professional use.

HOW TO USE THIS WORKBOOK

# AI FOR SALES — FROM RESEARCH TO THE NEXT STEP

A full pipeline can hide stalled deals. Messages go out, proposals get written and fields get updated, yet nobody knows which decision is missing. This workbook builds a sales process you can follow: every stage has an owner, supporting evidence and a next step. AI prepares and organises the work; a person checks the facts, leads the conversation and keeps the commitments.

By the end, you will have a deal you can trace from research to delivery, a pipeline with clear progression criteria and a fourteen-day improvement plan.

## How to work

Work with one segment and one offer. Choose a real opportunity whose information you are allowed to use, or use the fictional case included here. Complete one chapter and update its worksheet before moving on. Do not put confidential information into an AI service without checking that you are permitted to use it that way. Fictional data and sanitised documents are enough for practice. Every procedure can also be carried out manually.

## What is included

Eight practical chapters, a complete fictional case, a fourteen-day plan, six CSV worksheets and editable Markdown text. The worksheets do not send messages or connect to your CRM.

## What is not included

Software, accounts, subscriptions, consulting, setup on your systems and guaranteed financial results are not included. All examples are fictional teaching scenarios: people, companies, dates and figures do not describe real customers.

## Contents

01 Design the process before choosing the tool

02 Choose prospects using verifiable information

03 Prepare a useful conversation

04 Qualify without turning the call into a form

05 Write follow-ups that move decisions forward

06 Turn the need into a proposal you can deliver

07 Practise one correction at a time

08 Measure the process for fourteen days

01 / PROCEDURE

# DESIGN THE PROCESS BEFORE CHOOSING THE TOOL

A stage name should describe what you know, not what you hope. ‘Hot’ does not explain why a sale should happen. ‘Problem confirmed and technical meeting agreed’ contains two observable facts. Given vague categories, AI can organise them neatly without making your forecast more reliable.

Start with your last completed sale and reconstruct the decisive steps. Do not hunt for the perfect process: describe one your team can actually follow. Each stage needs an entry condition, an exit condition and an owner. If two people each think the other is responsible, the handover is incomplete even when the CRM is up to date.

## Working steps

1. Define five states: needs checking, conversation started, qualified opportunity, proposal awaiting a decision, and won or lost. Keep cash received separate from a deal being won.

2. Write down the minimum evidence for each state. A friendly reply establishes a conversation; it does not establish budget or urgency.

3. Assign one owner and the next concrete event. ‘Follow up’ becomes ‘obtain confirmation of the two requirements by Friday’.

4. Decide when to pause or close an opportunity. Do not advance a record automatically just because time has passed.

## Fictional example

Fictional case: a service company sends a €1,200 proposal after a call. The contact says they need to discuss it with a colleague. The stage remains proposal awaiting a decision, with a review on Friday. Cash received stays at zero. An internal reminder is not a confirmed appointment.

## Use AI this way

Provide your process map and three anonymised notes. Ask: ‘Assign a stage only when the notes contain supporting evidence. Quote the sentence that supports it; otherwise write missing information. Do not estimate the probability of closing.’ Check each assignment against the original text.

## Exercise

Take five opportunities. Rewrite the stage, evidence, owner and next event for each. If two records receive the same generic ‘call back’, clarify which different answers you need to obtain.

DONE WHEN — A colleague can explain the stage of every opportunity by reading the evidence, without asking what you meant.