

Building a Sales Pipeline with AI

Artificial intelligence (AI) tools streamline the key steps of building a sales pipeline, targeting, researching, and outreach, making the process more efficient and effective.

Before you start using AI to drive your business, it's important to make sure you're using AI responsibly. Without proper protocols, your business and client relationships could be at risk.



Using AI Responsibly

To ensure your organization is using AI responsibly, we strongly recommend creating an **AI usage policy to keep proprietary information safe, remain compliant with regulations, and avoid data leaks.**

Building Your Policy:

- 1 Define acceptable vs. unacceptable use cases.
- 2 Specify what types of data can be entered into AI tools. Address client confidentiality, IP protection and ethical concerns.
- 3 Include rules for public AI vs. approved vendor tools.



TIP: Not sure where to start? Our sales experts can walk you through the process and help you build a custom AI policy for your sales team.

Suggested Guidelines:

- ✓ Do not share private company or customer information.
- ✓ Always keep the human element.
- ✓ Always validate the accuracy of information.
- ✓ View AI as a teammate to collaborate with.
- ✓ Know the limitations of your tools.



Targeting Prospects

Identifying the right prospects is the foundation of effective sales prospecting. Simple prompts can help you construct an ideal customer profile (ICP) and buyer personas.

Sample Prompts

- 1** I am in sales at [company name]. Our typical clients are in [industry] and [location], as well as [include size, revenue, or other data points]. Use this information to create an ideal customer profile and define the companies likely to use our product.
- 2** [Company name] provides [insert product or service], to [insert typical titles]. What are their pain points?
- 3** I am in sales at [company name], providing [insert product or service]. List company types (startups, SMEs, large corporations) that typically need our product or service.

Based on your ICP, AI can further enhance the process by building a list of names and targets and analyzing and segmenting target lists.

Sample Prompts

- 1** I am a sales leader for [company name]. Our top clients are [insert client size, revenue, industry, etc.]. Use this information to determine emerging sectors that might find our offering relevant.
- 2** Our top clients are [insert client size, revenue, industry, etc.]. Use this information to find other companies that match this profile.



TIP: Explore AI-driven prospecting tools that integrate with your CRM. Utilize the tool to research, gather, and analyze your current client data to refine your ICP further.



Researching Prospects

Once you have identified potential leads, understanding them can mean the difference between a lackluster outreach attempt and a meaningful engagement. Use AI to find relevant information about your prospects and their organizations, helping you enter the conversation with knowledge and insight.

Sample Prompts

1

I am a sales leader for [company name]. What are the current trends in [industry] that could affect customer preferences for our product/service?

2

[Company name] provides [insert product or service]. What are the main challenges faced by clients who use our type of service?

3

Our top clients are [insert client size, revenue, industry, etc.]. What factors influence the buying decisions of our ideal customers?



TIP: Use a chatbot to ask about the Company's history, key markets and products. You can also ask if there are any insights into the company's strategic priorities to understand how your products/services may fit in.





Building an Outreach Plan

With your prospects identified and thoroughly researched, it's time to craft an outreach plan that connects with them on a personal level. Scheduling and automating outgoing communications allows you to spend more time adding new opportunities to the pipeline.

Sample Prompts

- 1** Create an outreach plan for [time frame] that includes [X number of unique messages] via [email, LinkedIn, phone, etc.] to entice my prospects.
- 2** Create [X number] of LinkedIn posts around [insert buyer pain points] and tie them to [insert solutions].
- 3** Create a series of [X number] of follow-up emails based on my initial outreach [insert first email].
- 4** Create a call and voicemail script for prospects with these [insert pain points] tying it to [specific product/service].



TIP: Ask the Chatbot to help you test subject lines, create A/B messages for testing, and what the most effective marketing channels to reach your target audience are.

Connect with our team to learn how a Fractional Sales Leader can help your company accelerate sales growth.

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