

From Manual to Magical: How AI is Redefining Agency Sales

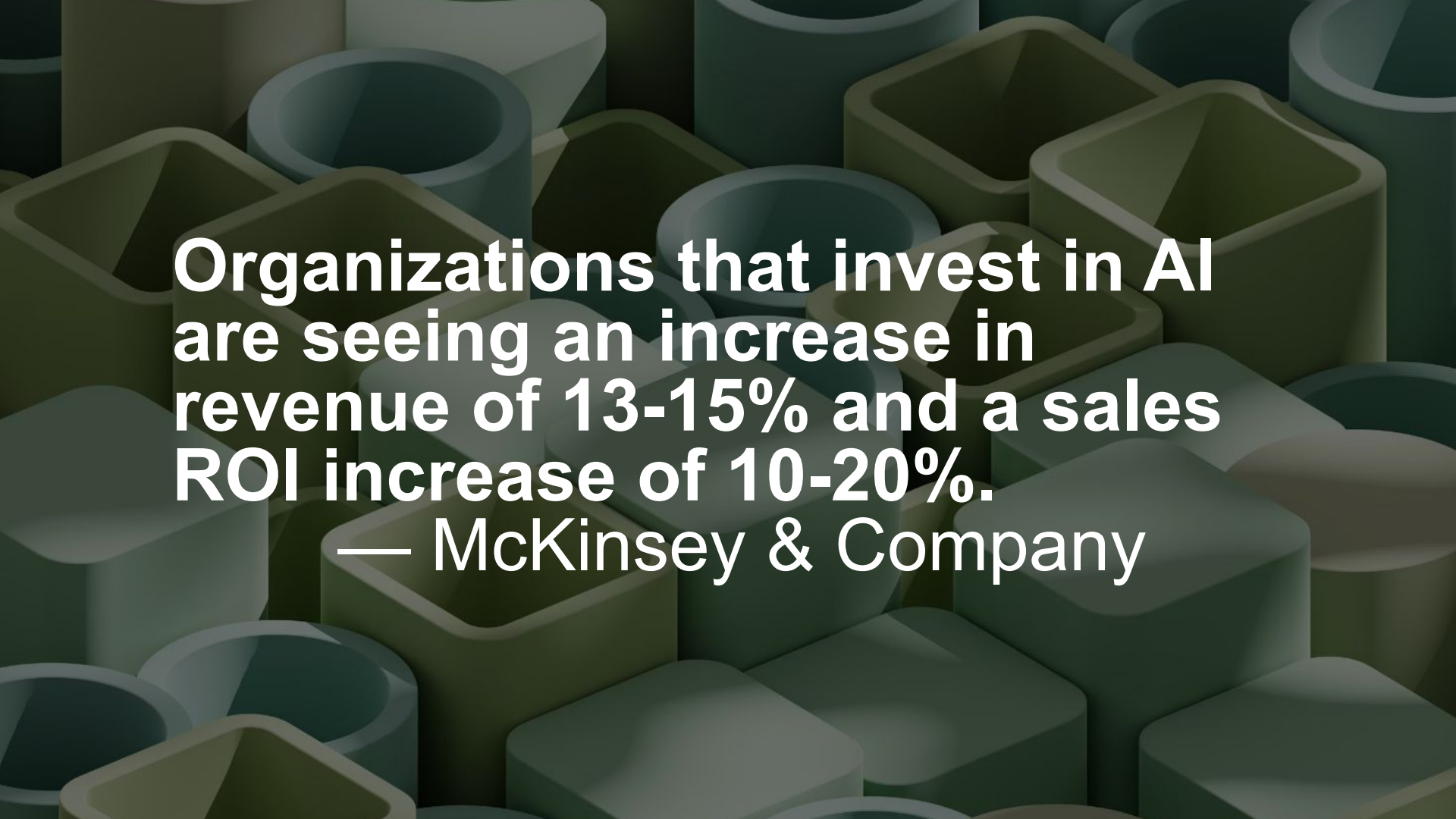
Kathleen Perley



Agenda

- ↳ 6 AI Use Cases Agency Biz Development
- ↳ How to Use AI for Research & Discovery
- ↳ Personalization & Outreach
- ↳ Training & Automation
- ↳ Q&A





**Organizations that invest in AI
are seeing an increase in
revenue of 13-15% and a sales
ROI increase of 10-20%.**

— McKinsey & Company

6 Unique Ways AI Can Be Used in Business Development & Sales

→ **Ideal Customer Profiling:** Use AI to analyze your existing customer base and market data to create detailed ideal customer profiles. This helps identify new prospects that closely match your most valuable customers.



6 Unique Ways AI Can Be Used in Business Development & Sales

- **Ideal Customer Profiling:** Use AI to analyze your existing customer base and market data to create detailed ideal customer profiles. This helps identify new prospects that closely match your most valuable customers.
- **Content Personalization:** Utilize generative AI tools like ChatGPT to craft personalized email, call scripts, and other outreach content tailored to each prospect's specific needs and preferences. This increases engagement and resonance



6 Unique Ways AI Can Be Used in Business Development & Sales

- **Ideal Customer Profiling:** Use AI to analyze your existing customer base and market data to create detailed ideal customer profiles. This helps identify new prospects that closely match your most valuable customers.
- **Content Personalization:** Utilize generative AI tools like ChatGPT to craft personalized email, call scripts, and other outreach content tailored to each prospect's specific needs and preferences. This increases engagement and resonance
- **Sentiment Analysis:** Analyze sales conversations and customer interactions using AI to extract insights about buyer sentiments, pain points, and preferences. Use this intelligence to inform more effective prospecting strategies.



6 Unique Ways AI Can Be Used in Business Development & Sales

- **Ideal Customer Profiling:** Use AI to analyze your existing customer base and market data to create detailed ideal customer profiles. This helps identify new prospects that closely match your most valuable customers.
- **Content Personalization:** Utilize generative AI tools like ChatGPT to craft personalized email, call scripts, and other outreach content tailored to each prospect's specific needs and preferences. This increases engagement and resonance
- **Sentiment Analysis:** Analyze sales conversations and customer interactions using AI to extract insights about buyer sentiments, pain points, and preferences. Use this intelligence to inform more effective prospecting strategies.
- **Lead Scoring:** AI-driven lead scoring models can automatically rank and prioritize prospects based on their likelihood to convert, using data like company size, industry, online activity, and more. This helps agencies pursue the most promising leads first.



6 Unique Ways AI Can Be Used in Business Development & Sales

- **Ideal Customer Profiling:** Use AI to analyze your existing customer base and market data to create detailed ideal customer profiles. This helps identify new prospects that closely match your most valuable customers.
- **Content Personalization:** Utilize generative AI tools like ChatGPT to craft personalized email, call scripts, and other outreach content tailored to each prospect's specific needs and preferences. This increases engagement and resonance
- **Sentiment Analysis:** Analyze sales conversations and customer interactions using AI to extract insights about buyer sentiments, pain points, and preferences. Use this intelligence to inform more effective prospecting strategies.
- **Lead Scoring:** AI-driven lead scoring models can automatically rank and prioritize prospects based on their likelihood to convert, using data like company size, industry, online activity, and more. This helps agencies pursue the most promising leads first.
- **Sales Forecasting:** Study past data and trends with AI to forecast future sales opportunities, revenue potential, and high-growth areas. Strategically allocate prospecting resources accordingly. (If you have a CRM)



6 Unique Ways AI Can Be Used in Business Development & Sales

- **Ideal Customer Profiling:** Use AI to analyze your existing customer base and market data to create detailed ideal customer profiles. This helps identify new prospects that closely match your most valuable customers.
- **Content Personalization:** Utilize generative AI tools like ChatGPT to craft personalized email, call scripts, and other outreach content tailored to each prospect's specific needs and preferences. This increases engagement and resonance
- **Sentiment Analysis:** Analyze sales conversations and customer interactions using AI to extract insights about buyer sentiments, pain points, and preferences. Use this intelligence to inform more effective prospecting strategies.
- **Lead Scoring:** AI-driven lead scoring models can automatically rank and prioritize prospects based on their likelihood to convert, using data like company size, industry, online activity, and more. This helps agencies pursue the most promising leads first.
- **Sales Forecasting:** Study past data and trends with AI to forecast future sales opportunities, revenue potential, and high-growth areas. Strategically allocate prospecting resources accordingly. (If you have a CRM)
- **Automation:** Set up AI-powered triggers and actions that automate routine prospecting tasks like follow-ups, information access, and responding to customer interactions promptly.



Try This.... Not That

Context is Key

Be clear and specific about your requirements to get the most relevant and helpful responses.

Set the Right Tone

Make sure you specify the tone you want. This way, you can match the tone of the AI's responses to your brand's voice or the tone of the client's brand.

Test Different Prompts

Experiment with how you phrase your prompts and choose the best result. Save the Winners!

Instead of....

Write an email to a prospect

Draft an email to a long-term client about our new product

Write a follow-up email to a client who hasn't responded to our previous message

Try.....

"Draft an email to a potential client named Sarah. Sarah's company is a growing startup with around 50 employees, looking to leverage advertising to drive new sales. They have shown interest in our digital media advertising services. The email should introduce our services, discuss how it can address their needs, and propose a date for a media audit review."

"Draft a friendly, warm email to our long-term social media client, John, introducing our new product around CRM management."

"Compose a gentle, friendly reminder email to a client who has missed our previous communication."

Or

"Write an quirky email that is professional but has a hint of humor that hasn't responded to a previous email."



How to Use AI for Intelligence Gathering

Prompts for Intelligence Gathering

→ When you've identified a top prospect, ask chat GPT to provide an analysis of the organization using this prompt.

“Take on the persona of a business development VP at a {insert niche} advertising agency, and provide me an analysis of {insert company name} ({insert company URL}). Outline the company's key service offerings with a short summary, any accolades or awards, and who is their target audience. Be sure to review the website in full and provide short bullet point information on the above.”



Prompts for Intelligence Gathering

- ⇒ To garner more intelligence about an industry or sector, ask chat GPT to provide analysis using some of these prompts
- Summarize industry trends in the *{insert industry category}* sector and how they impact *{insert target audience of client}*
 - Outline the demographic, psychographic, and behavioral characteristics of the target market for *{insert prospect's products or services}*
 - *Analyze the strengths and weaknesses of our {competitor name} {competitor URL} in the {digital marketing} space, and suggest potential areas to capitalize on.*
 - Summarize and pull out the key points from this transcript. *[Upload a video transcript from a call or recorded webinar]*



Prompts for Personalized Outreach + Follow-Up

→ When you've identified a top prospect, ask chat GPT to help provide a personalized outreach for a prospect.

“Take on the persona of a business development VP at a {insert niche} advertising agency, and provide me an outreach LinkedIn Message to {insert name} a {insert title} at {insert company name} ({insert company URL}). Have the message include how our {insert product or services ({insert services guide})} can help with {insert goal} in the {insert industry}. At the end of the message include a link {insert scheduling link} to schedule a 15 minute meeting with, {insert name and title} to learn how we can help grow their business. Please ensure the message has a {insert tone}”



Prompts for Personalized Outreach + Follow-Up

- ↳ To develop more personalized outreach for higher conversion rates
 - *Craft an attention-grabbing prospecting email for a salesperson at {insert agency descriptor} agency targeting {insert target audience} who need {insert product/services}.*
 - *Write an engaging introductory email for a {insert agency descriptor} agency reaching out to {insert target audience} for the first time.*
 - *Generate a friendly follow-up email for a salesperson who had a {insert interaction} with a potential client interested in {insert product/services}.*
 - *Craft a follow-up email for an {insert product/services} salesperson after a potential client attended a webinar about our platform.*
 - *Considering the content of the email below, devise ten high-impact subject lines that would intrigue the recipient and encourage them to open the email. Ensure at least half of these subject lines are personalized and address the specific needs or challenges of {insert recipient email}.*



A stylized, 3D-rendered blue rose is the central focus of the image. The petals are layered and curved, creating a sense of depth and texture. The rose is set against a dark blue gradient background. Overlaid on the center of the rose is the text "Training & Automation" in a bold, white, sans-serif font. The text is split into two lines: "Training &" on the top line and "Automation" on the bottom line.

Training & Automation

Prompts for Training + Automation

- To assist with training or sales automation, ask chat GPT to provide analysis using some of these prompts
- Act as a CMO of *{insert company size}* in this *{insert industry}*. Our agency offers *{insert products or services}*, help me put together the right pitch and messaging for you.
 - Draft a roleplay as a potential client interested in more information about our *{insert products or services}* before committing. I'll provide the necessary details to help you make a decision.
 - Act as a prospect who is hesitant about the cost of our *{insert products or services}*. Let's discuss the value and benefits it offers.
 - Generate a 60-second sales script asking if *{prospect's name and job title}* is struggling with *{problem}*. Include an anecdote about *{relevant detail about your prospect}*.
 - Compose a 3-min script to walk *{prospect name}* through the the proposal. Summarize the following *{upload or copy and paste proposal information}*. End the script by reminding with asking for any questions and discussing the date they need to agree to hit our deadline for launch.



Questions?



Connect with Me



Kathleen Perley

Kathleen, founder of DECODE advertising, which she successfully sold in 2023, is renowned for her innovative digital transformation strategies. Now, she is pivoting back to her roots in linguistics and AI, building on her distinguished career and numerous accolades as an adjunct professor at Rice University.



 /Kathleen-Perley

 @kcperley

 KP@demystifAI.com



Thank you!