

salesforce

The Sales AI Playbook: 7 Ways AI Can Help You Close More Deals

A guide to the cutting edge
of AI, with use cases and best
practices to get started

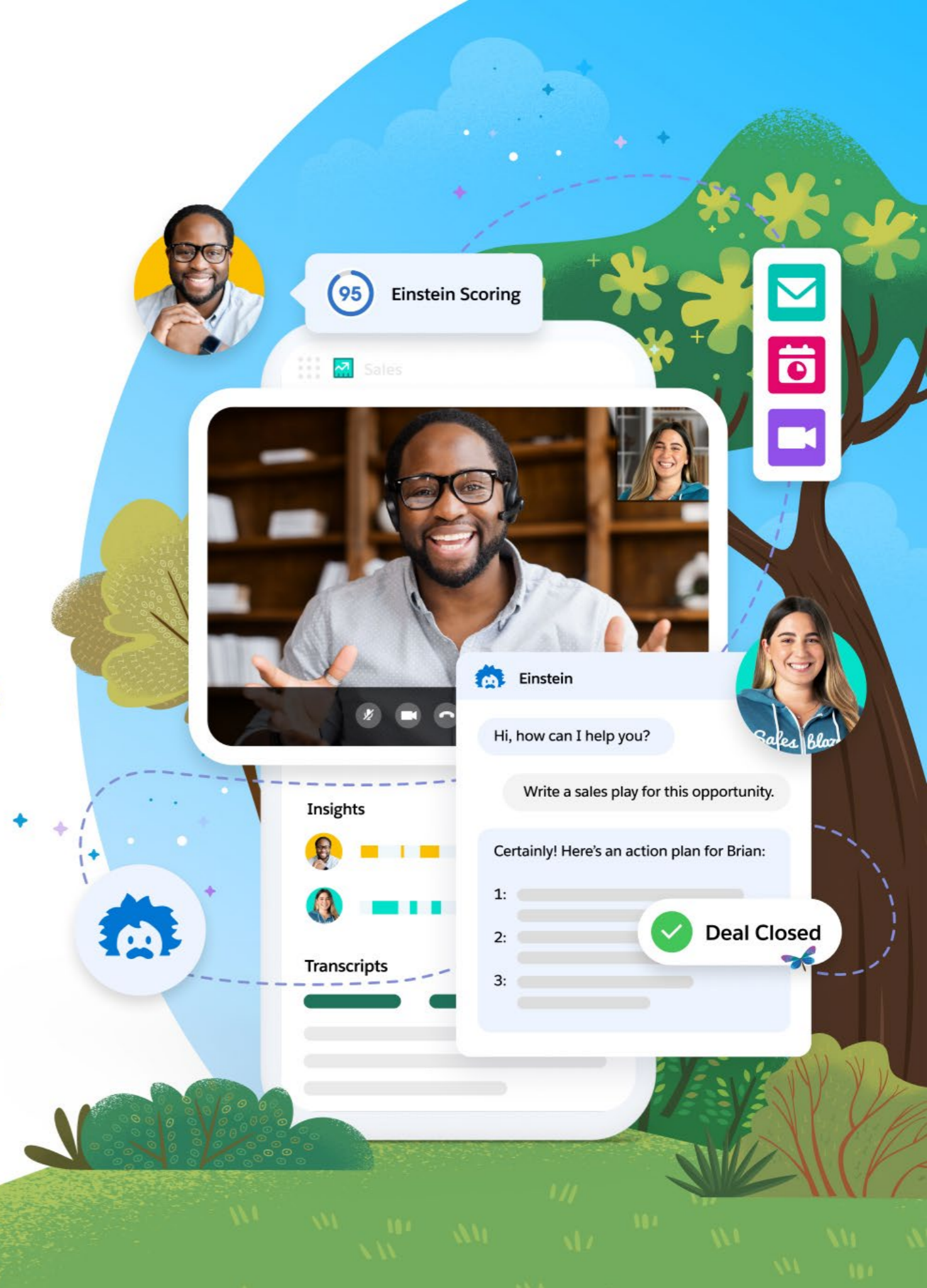


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The AI coworker accelerating sales.

Artificial intelligence for sales is at a tipping point, with high-performing sales teams [nearly twice as likely](#) to use AI than low-performing teams. But this technology didn't emerge overnight.

Predictive AI came first, a decade ago, with tools that monitor customer data and deliver insights and recommendations to sellers: the hottest leads, the deals at risk, and whether you're on track to hit your forecast.

When **generative AI** burst onto the scene in 2022, AI wasn't just telling us things anymore. It was creating content for us. It was summarizing calls, writing emails, and creating sales plays. We could talk to AI in conversations, not code.

Even more recently, **autonomous AI** performs complex tasks like an assistant, such as chatting with website visitors and qualifying them into leads.

What AI innovation looks like for sellers:

PREDICTIVE AI

Getting AI-powered insights and next steps.

"Which of these prospects should I sell to?"

GENERATIVE AI

Asking AI to generate content for you.

"Please write an email to these prospects introducing me."

AUTONOMOUS AI

Trusting AI with more complicated tasks.

"Please call the prospects who responded to schedule a meeting."

This means AI is starting to feel less like a computer program and more like a coworker. It knows the customer as well as you do. You can invite it over to huddle at your desk, talk to it in plain English, and ask for help. The benefits? Prospect faster, sell smarter, and close more deals.

Still, with all the AI progress and excitement, sales teams feel unprepared. Only 47% saying they [know how to get the most value](#) out of generative AI at work. This guide can help. We'll share examples of the most important uses of AI for sales, along with best practices to bring it to your company.



USE CASE
01

Automate lead qualification.

Sales reps [spend 72% of their time](#) on non-selling tasks, and prospecting is one of the most time-consuming. What if you could turn your website into a sales rep, and use AI to send you qualified leads?

What AI can do:

AI does away with your website's old-fashioned form and replaces it with live conversations, using a chat tool that talks to leads and asks questions to qualify them at that critical moment when they're researching what you're selling.

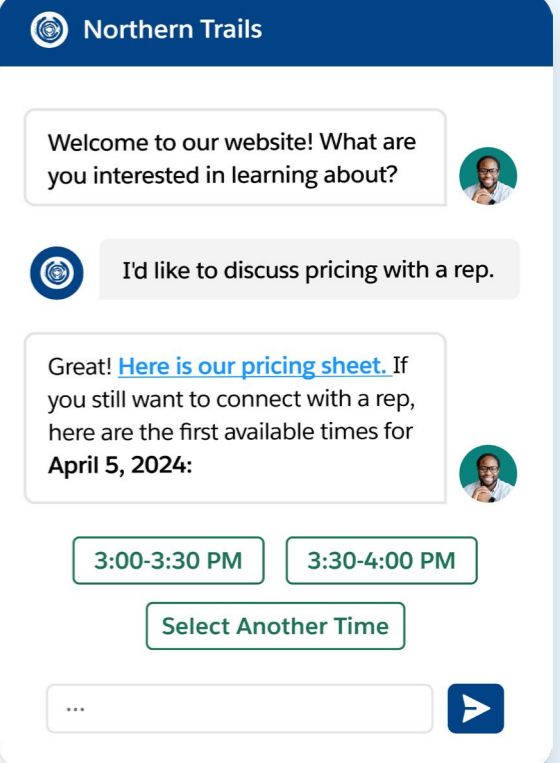
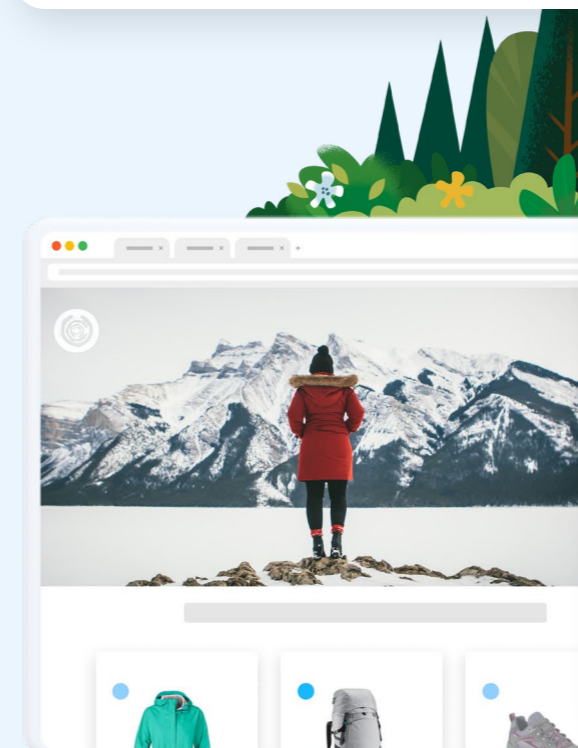
Example of AI in action:

A lead visits your company website to do product research and launches a live chat to learn more. [Buyer Assistant](#), a chat tool from Sales Cloud, greets them and asks questions to understand their profile and interest level. It turns out this lead meets the buyer persona criteria set by sellers, so Buyer Assistant qualifies them as a prospect and captures their contact information. The AI then cross-checks CRM data to see if there are any other records related to them or their company, gathering context for sales reps down the line.

At the end of the chat, the chat tool offers the buyer the option to connect with a sales rep instantly or with a scheduled meeting. The prospect makes their selection, and the sales rep receives all the intel they need to have a successful conversation: the chat transcript, lead record, and other relevant CRM data.



Capture qualified leads directly from your website with [Buyer Assistant](#).



USE CASE
02

See the future of your deals.

Before you can predict the future of your deal outcomes, you have to understand all the signals in your pipeline. Which leads will become deals, and which ones are duds? Answering this is tedious, time-consuming, and requires making judgment calls based on a large volume of data. In other words: It's the kind of task that's best left to AI.

What AI can do:

AI studies historical CRM data to find the characteristics of successful and unsuccessful deals. Then it predicts the likelihood that future leads will close, and ranks them with scores. As reps continue to interact with customers and log data in the CRM, the AI tool updates lead profiles to ensure the scores are always accurate.

Example of AI in action:

It's the beginning of the quarter and a sales rep is determined to focus on the right leads to meet quota. They pull up a list view of their current leads and sorts them based on their [Opportunity Scores in Sales Cloud](#), which ranks them between 1 (very unlikely to close) and 99 (very likely).

The rep wants to learn more and clicks on the score to look through the positive and negative factors behind each one. This helps the rep understand why certain deals are hotter than others. The rep gets to work reaching out to the ones considered most likely to close.

Einstein Scoring 95

- Top Positives**
 - Past wins with this account
 - Actively works with partner
- Top Negatives**
 - Close date pushed 5 days

Opportunity Acme

Amount	Score
\$125,249.00	95

Proposal/Quote

Average Sales Cycle	Win Rate
87 Days	76%

Identify the deals that are most likely to close with [Einstein Opportunity Scoring](#).

USE CASE
03

Write personalized emails with a sales assistant.

You didn't get into selling to write emails. Thankfully, AI can write sales emails as effectively as humans can, freeing up more of your day to sell. It's no wonder why 82% of sales teams [are already using generative AI](#) to create content like emails.

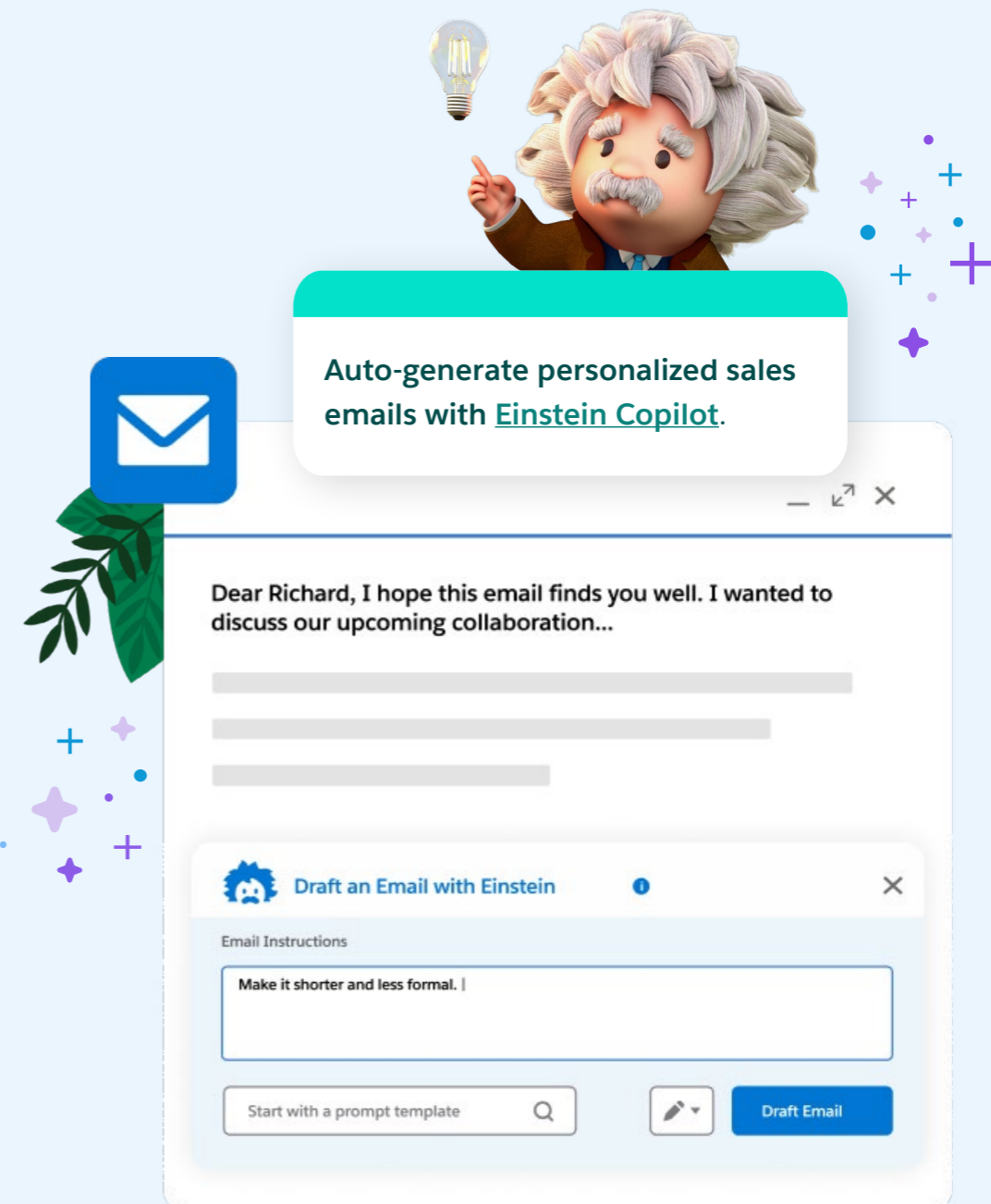
What AI can do:

Generative AI wowed us in 2022 with its ability to write like a human. Those early models used public data, but today, generative AI can look at your internal customer data as well. This allows your team to go beyond generic emails and personalize their outreach using information already stored in your CRM.

Example of AI in action:

A sales rep wants to email a customer about a product launch. The rep opens Outlook in [Sales Cloud](#) and gives Einstein a prompt: "Email Richard Reed about our new product launch." Einstein pulls up the customer's record and sees the rep has previously worked with them. In seconds, Einstein drafts an email that shares the latest product information with a nod to their previous interactions: "Dear Richard, I hope this email finds you well. I wanted to discuss our upcoming collaboration ..."

The seller sees the email is too long and a bit stuffy, and asks Einstein to make it shorter and less formal. Einstein rewrites the email to introduce the new product in a way that will keep the customer hooked. That's generative AI, helping sellers move fast with personalized content while the customer is still engaged.



USE CASE
04

Prepare for meetings instantly.

Sales is a relationship game, which is why reps spend hours every week researching lead interests, needs, and behaviors they can use to build stronger connections. Imagine having a tool that does this for you, giving you the superpower to get up to speed in seconds.

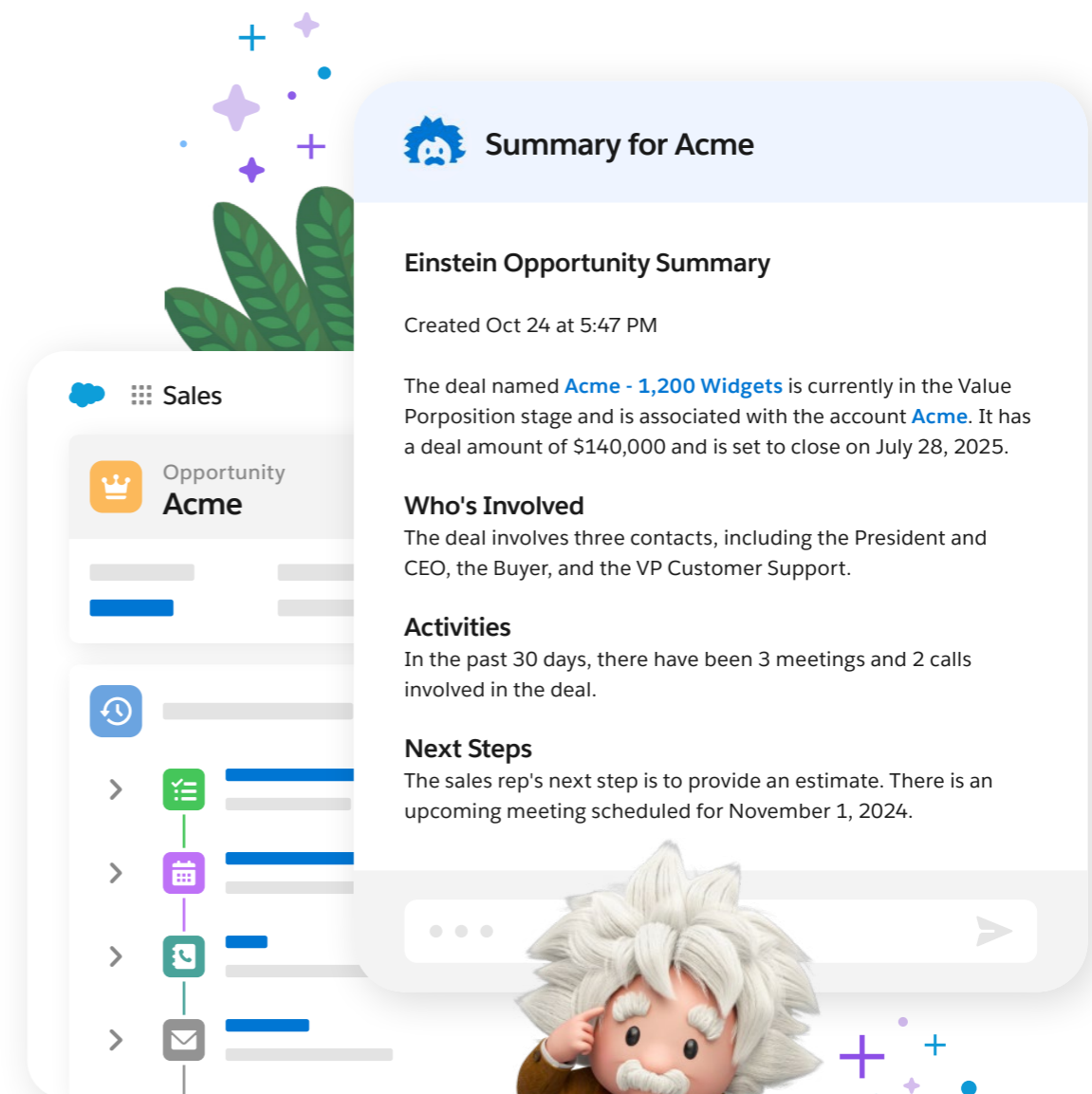
What AI can do:

AI can do the research heavy lifting, looking at both public data and CRM data and summarizing critical prospect information you need to know before every meeting. If there's something specific you're looking for, just type in a question and get an AI-powered response.

Example of AI in action:

A sales rep begins covering for a colleague who's gone on leave and wants to get up to speed on the biggest accounts. They filter for deals in Sales Cloud with a revenue amount of over \$100,000. Many of these deals have data going back years – a lot of information to sift through. Einstein helps by serving up deal summaries with key information like who's involved, recent activities, risks to be aware of, and recommended next steps.

Einstein then flags that one of the customers has sent an email with pricing questions and is waiting for a response. The rep asks Einstein: "What are the key things I need to know about this customer before responding to this email?" Einstein summarizes the deal in plain English with key account details and notes from prior meetings to help the rep pick up where the conversation left off.



Summarize your deals and customers with [Einstein Copilot](#).

USE CASE
05

Get call support with automated note-taking.

Sales calls are chock-full of critical information, but that intel is hard to capture manually and even harder to explore later. Sales reps who want to find that one key thing that was said have to listen back through the entire call – a time sink.


What AI can do:

AI can transcribe sales calls into structured summaries, flag key moments, and identify the best actions to take next. This richly annotated documentation transforms your sales calls from dark data into clean data that you can mine for insights.

Example of AI in action:

During a call, a sales rep uses [Einstein Conversation Insights](#) (ECI) to take detailed notes so they can focus on the customer. Shortly after the call, ECI compiles exactly what the rep needs: a transcript, a summary of customer sentiment and topics discussed, such as goals, objections, and mentioned products. ECI also includes recommended actions to take next.

The customer disappears for a while after the call, but then reappears with an email: “Are you free now to compare the purchase options we discussed a few months ago?” Uh-oh. The sales rep, drawing a total blank, asks Einstein: “What were the purchase options we discussed in that call a few months ago?” In seconds, Einstein replies: “The customer wanted to compare the subscription package with a one-time purchase, and raised a pricing objection over the cost of the subscription.” The rep picks up the phone, ready with a pitch.



Einstein

Call Summary
Pricing was discussed

Customer Impression
The customer seemed satisfied

Next Steps
Meeting for tomorrow was set

Add meeting to calendar

Transcripts

Pricing

Next Steps

Impression

“Let’s compare **Subscription pricing** with **one time**. And can you provide a **discount**? We have **budget constraints**.”

Create Call Summary

Summarize calls and explore past conversations with [Einstein Conversation Insights](#).

USE CASE
06

Eliminate data entry.

AI needs visibility into all your sales activities in order to provide insights and guidance. But logging all that data can feel like another full-time job at a time when 69% of sales pros say [their job is harder than before](#). The solution? Have AI log this data for you, giving you more time to sell.

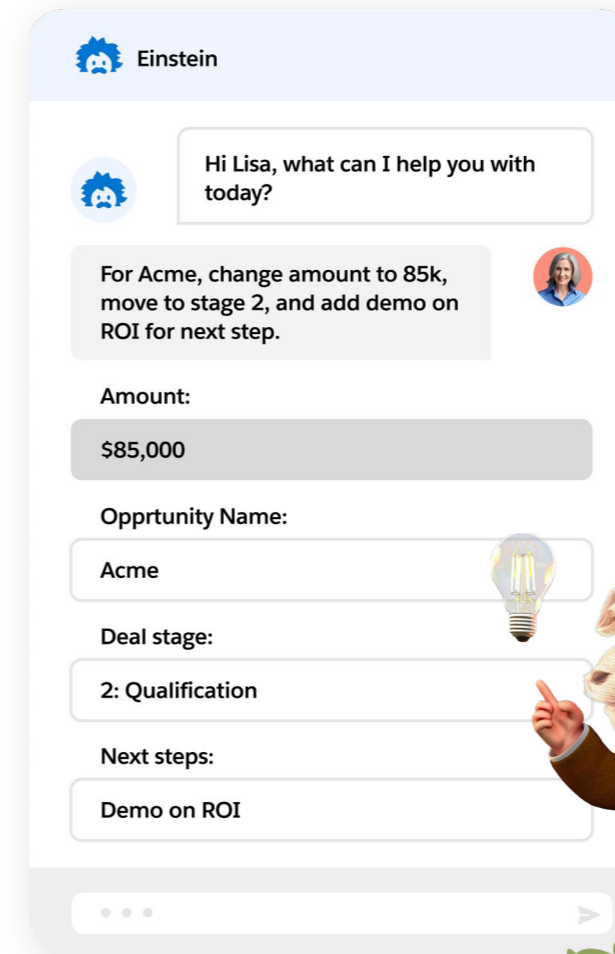
What AI can do:

As sales reps go through the sales process, AI captures all the data it needs from customer interactions – calls, emails, and messages – to analyze behavior, flag deal risks, and identify opportunities.

Example of AI in action:

A sales rep reaches out to a lead using Outlook and begins a sales conversation. Einstein creates a new deal record in [Sales Cloud](#), and as the rep and prospect go back and forth over email, Einstein updates the record with email summaries. The rep and prospect eventually meet on a call and then schedule a demo, and Einstein keeps up with every step – moving the deal to the next pipeline stage and adding call transcripts and summaries to the deal record.

Before the rep presents the demo, they research the prospect on LinkedIn and discover that the prospect is interested in cost-savings and productivity. The rep asks Einstein to make a note in the deal record to highlight these topics in the demo. When it's time to present the demo, the rep feels confident the tailored demo will deliver exactly what the prospect is looking for.



Einstein

Hi Lisa, what can I help you with today?

For Acme, change amount to 85k, move to stage 2, and add demo on ROI for next step.

Amount:
\$85,000

Opportunity Name:
Acme

Deal stage:
2: Qualification

Next steps:
Demo on ROI

...

Automatically capture sales activities and update your CRM with [Einstein Activity Capture](#).

Close deals faster with guided selling.

“Tell me what to do to close this deal.” It’s one of the most important questions a seller can ask and today, AI is equipped to answer it.

What AI can do:

Generative AI can give your sales team close plans: specific step-by-step instructions on how to close deals. The reason these plans are so difficult to automate is that they need to change all the time, based on buyer activity and your team’s evolving tactics. But now that generative AI can keep up with all these changes – looking at internal and external data – recommended actions can be personalized to both buyer and seller and updated as new information comes up.

Example of AI in action:

A sales rep is working on a deal that has stalled. No problem. The rep simply asks Einstein for a close plan to unstick and seal the deal quickly. Einstein does an instant analysis and isolates the problem: The sales rep is up against a competitor’s pricing.

Einstein recommends a close plan to outmaneuver the competitor: Send an offer for a discounted bundle of two specific products that can beat the competitor’s offer. The sales rep asks Einstein to send an email with a datasheet comparing the details of the discounted bundle to the competitor’s products and pricing.



Give reps instant feedback and personalized programs for closing, using [Einstein Copilot](#).

 Einstein

Hi, how can I help you?

Write a close plan for this opportunity

Certainly! Here’s an action plan for Acme:

1: Re-engagement call, 5/4/24

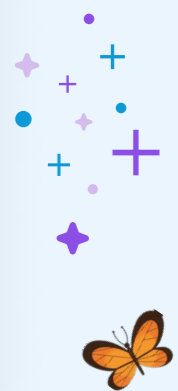
Action: Call Chandra Patel (CTO).

Focus: Acknowledge the lack of communication and describe the value of our widgets given their new acquisition. Propose a meeting.

2 . In-person meeting, 5/8/24

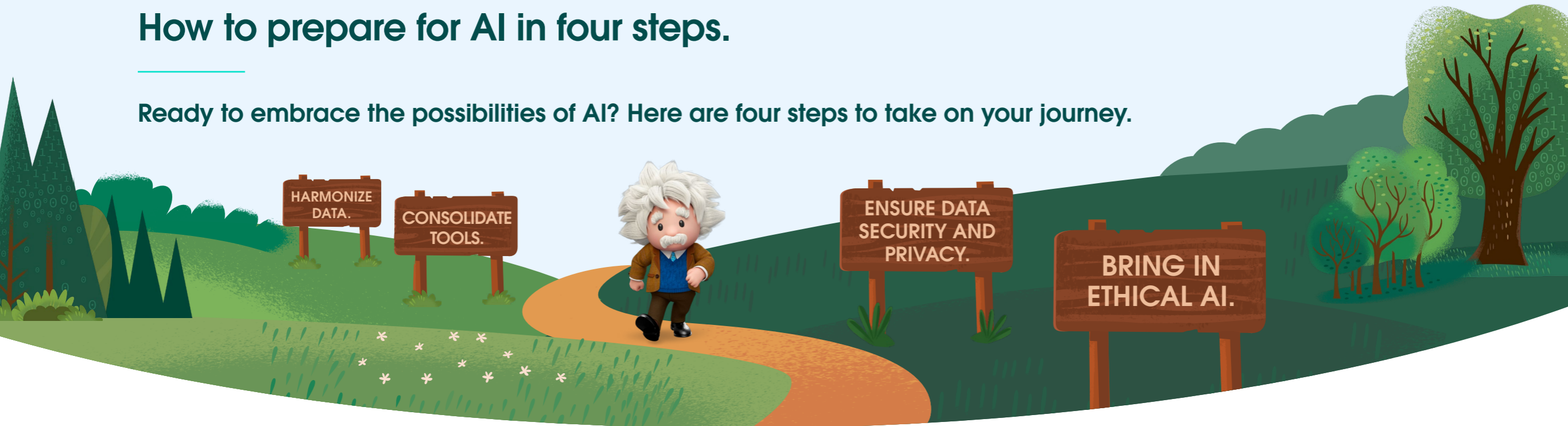
Action: Meet at Acme HQ. Invite Chandra Patel (CTO) and Jeff Steen (VP of Operations).

Focus: Demonstrate the widgets in the context of...



How to prepare for AI in four steps.

Ready to embrace the possibilities of AI? Here are four steps to take on your journey.



1 Unify and harmonize all your data for AI to see. AI needs to see the same customer data you do in order to work effectively. The challenge is that this customer data is often spread out across internal and external systems, using different formats. Bring all of this rich data together using [technology](#) that standardizes, or “harmonizes,” disparate data sources into one unified stream of clean data. This will ensure that AI has a 360-degree view of your customer.

3 Protect your customer data. Many customers don’t trust companies with their data, and now 71% of IT leaders say generative AI [will introduce data security risks](#). Before you start using AI, ensure data security and privacy by using industry-standard security measures. These include: encrypting prompts, stripping data of personally identifiable information, and never storing data outside your CRM.

2 Consolidate AI tools in one place — your CRM. Now that you’ve cleaned up your customer data for AI to see, simplify your tech stack by [consolidating AI tools within your CRM](#). This ensures your data and AI capabilities are in one central place, and makes reps more efficient by delivering insights and generative tools in the same system where they already sell. It also saves money otherwise spent maintaining a cumbersome tech stack.

4 Ensure the ethical use of AI. Over half (54%) of sales professionals say [ethical use guidelines are critical](#) for using generative AI, because AI outputs carry the risk of misinformation, toxicity, and bias. As AI for sales becomes more powerful and widespread, it’s critical to bring in checks and controls such as asking humans to scan results and provide feedback on models to help them improve.

More resources to help you sell with AI.



Want to take Sales Cloud for a test drive?

Go on our guided tour of these 7 use cases, and see for yourself how Sales Cloud helps you sell faster with trusted AI.

TAKE THE TOUR



Learn how Salesforce uses AI to boost productivity.

Join a discussion about how we use AI at Salesforce to push the limits of business productivity and selling.

WATCH THE WEBINAR





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