



Implementing AI in sales cycles

Using AI to make discovery, qualification, account research, proposals, and follow-up more deliberate and customer-relevant.

WORKS WITH THE ASSISTANTS TEAMS ALREADY USE



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AT A GLANCE

Using AI to make discovery, qualification, account research, proposals, and follow-up more deliberate and customer-relevant.

Buyers can tell when outreach is generic, and sellers lose hours to preparation, note-taking and CRM upkeep. AI can help with both, but only when it serves customer relevance rather than volume. This playbook shows sales leaders and sellers how to use AI across the cycle: account preparation, discovery, qualification, proposals, follow-up and pipeline hygiene. It includes request templates, the information rules that protect customers and prospects, verification habits that keep claims honest, and simple measures of whether the effort improves outcomes.

WHO IT IS FOR

Sales leaders, account executives, sales development and sales operations staff who want AI to improve preparation and follow-through.

TIME TO USE

55 minutes to read; one sales team session to apply

What you will have at the end

- A map of sales tasks by AI fit and the seller checkpoint each needs
- Request templates for account research, discovery prep, call notes, proposals and follow-up
- Rules for customer data, recordings and prospect information
- Verification habits that keep claims, pricing and commitments accurate
- Measures that show whether AI is improving sales quality and not only activity

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EXECUTIVE BRIEF

AI should make sellers more relevant, not just more prolific

01



The advantage lies in better preparation and cleaner follow-through. Mass-produced personalization wastes buyers' time and damages trust.

It is easy to point an assistant at a prospect list and generate hundreds of emails. It is also easy for buyers to recognize them. The better use of AI in sales is quieter: a sharper account brief in ten minutes instead of forty, a discovery plan that targets what matters to this buyer, call notes that become accurate next steps the same day, and a CRM that reflects reality because updating it takes less effort.



Sales has particular risks. Sellers handle customer confidential information, make claims about products and prices, and create commitments. An assistant does not know your current pricing, your contract terms or what is true about your product. If it fills the gap with something plausible, a seller may promise what the company cannot deliver.

- Use AI for preparation, structure, drafting and note-taking. Keep relationships, judgment and commitments with the seller.
- Anchor every claim about your product, price and terms in approved sources, not in the assistant's memory.
- Treat prospect and customer information as confidential; follow consent and recording rules that apply.
- Measure outcomes such as meeting quality, conversion between stages and cycle length, not only emails sent.
- Keep a human reading every external message before it goes out.



THE WORKING PRINCIPLE

Use AI to understand the buyer better and to remove admin. Do not use it to scale messages the buyer did not ask for.



Below is a task map, setup rules, step-by-step playbooks with request templates, verification habits and routines for the team. Adapt the language to your market and sales motion, and confirm obligations on marketing outreach, recording and privacy with your own legal and compliance contacts.

WORKING QUESTION

Where do your sellers lose the most time today that does not involve talking to a buyer?

THE WORK MAP

Which sales tasks suit AI and where the seller decides

02

Preparation and admin are strong fits. Anything that sets expectations with a buyer needs the seller's eyes and judgment.

TASK	GOOD FIT FOR AI	HUMAN CHECKPOINT
Account research and briefing	Strong: organizes public information and open questions	Seller verifies facts and drops anything unsupported
Discovery preparation	Strong: draft question sets by role and stage	Seller chooses and sequences questions
Call notes and summaries	Strong with consent and approved tools	Seller corrects and confirms before CRM entry
Qualification against your criteria	Good as structured analysis	Seller or manager makes the call on fit and stage
Proposal drafting	Good for structure and first drafts from approved content	Seller and deal desk verify scope, price and terms
Follow-up emails and mutual action plans	Strong	Seller reads and confirms every commitment
Pricing, discounts, legal terms, forecasts	Do not delegate	Authorized people decide, per policy

The strongest early gains tend to come from preparation and from follow-up, the bookends of every interaction. Both reward consistency, and both are easy to verify because the seller knows what was said and what is true.

Where AI helps by stage



- Prospecting: briefs on the account and role, and questions worth asking, not mass messages.
- Discovery: preparation, note capture, and a structured record of needs, stakeholders and criteria.
- Evaluation: tailoring proof points from approved material to the buyer's stated priorities.
- Proposal: assembling and adapting approved content, with checks on every number and term.
- Close and handover: summarizing what was promised so delivery teams start with the same facts.
- Pipeline hygiene: prompts that flag stale deals, missing fields and unanswered next steps.



WORKING QUESTION

In your own cycle, which stage would benefit most from better preparation, and which from faster follow-up?

SETTING UP SAFELY

Information rules for prospect and customer data

03



Sales teams hold personal data, confidential deal details and competitive information. Decide what may go where before habits form.



Treat what customers and prospects tell you as confidential. Use approved tools with settings your organization has reviewed. Rules on recording calls, consent, storing personal data and outreach vary by region and sector, so check current requirements with your legal and

compliance contacts and apply your own policies.

INFORMATION	RULE	PRACTICE
Prospect personal data (names, contact details)	Use approved tools; minimize	Use role and company only where the task allows
Customer contract terms and pricing	Approved tools only; restricted access	Do not paste into general chat tools
Call recordings and transcripts	Only with consent and permitted tools	Tell participants; follow local rules and policy
Competitive notes and win-loss detail	Internal only	Avoid sharing outside approved tools
Public company information	Generally fine	Cite sources and check dates

Setup for each seller

- Approved tools and accounts, with settings on retention checked
- A source-of-truth folder for current product, pricing and case material
- Clear guidance on recording and transcription consent for your calls
- A rule that no commitment, price or term is taken from an assistant
- CRM fields and permissions that match who may see what
- A contact for questions and incidents

COMMON MISTAKE

Letting the assistant describe your product from its general knowledge. It may mix your offer with a competitor's or describe features you do not have. Always supply approved product text and tell it to use only that.

Keep a short list of approved claims, proof points and case summaries that sellers can feed to an assistant. This both speeds preparation and keeps statements consistent and accurate.

WORKING QUESTION

Do your sellers have one trusted place to find current claims, pricing rules and case material?

TASK PLAYBOOKS

Account prep, discovery, proposals and follow-up, step by step

04



Give the assistant real context and constraints, and insist that it separate what is known from what is assumed.

Playbook 1: account briefing

01 Gather sources

Collect the prospect's public pages, recent announcements and any notes from earlier contact. Paste the text you want used.



02 Ask for a brief with labels

Request what is stated, what is inferred and what is unknown, with likely priorities and open questions.

03 Verify

Check key facts against the source. Remove anything you cannot trace.

04 Choose your angle

Decide which two or three points are worth raising and why they matter to this buyer.



REQUEST TEMPLATE: ACCOUNT BRIEF

Using only the text below, write a one-page brief on this company for a first meeting with its [role]. Sections: what the text says about their business; likely priorities, labeled as inference; five open questions to ask; risks or sensitivities. Quote the passage behind each fact. If the text does not say, write UNKNOWN.

Playbook 2: discovery prep and notes

01 Draft a plan

Ask for a discovery outline with goals for the call, questions by theme, and signals that suggest fit or poor fit.



02 Run the call yourself

Listen. The assistant does not replace attention to the buyer.

03 Structure the notes

After the call, paste notes or an approved transcript and ask for needs, stakeholders, criteria, timeline, budget signals and risks, with unknowns marked.

04 Confirm and file

Correct the draft, then update the CRM. Send a recap to the buyer for confirmation.

REQUEST TEMPLATE: CALL NOTES

From the notes below, produce: stated problems in the buyer's words; stakeholders and roles; decision process and timeline as stated; criteria; objections; agreed next steps with owner and date. Write NOT DISCUSSED where the notes are silent. Do not infer budget or authority.

Playbook 3: proposals

Provide the buyer's stated needs, your approved content blocks and the scope that has been agreed. Ask the assistant to arrange and adapt, not to invent. Then check every number, date, deliverable and term against the quote or deal desk record. Never let a proposal go out with scope, pricing or legal wording that an authorized person has not approved.

REQUEST TEMPLATE: PROPOSAL DRAFT

Using only the approved content below and the buyer needs listed, draft a proposal outline with an executive summary, how our approach addresses each stated need, and next steps. Use the buyer's own words where possible. Do not state prices, guarantees or timelines; leave placeholders marked [TO CONFIRM].

Playbook 4: follow-up

Within a day of each meeting, draft a short recap: what you heard, what you agreed, what each side does next and by when. Keep it brief and specific. A recap that mirrors the buyer's words shows listening and gives them something to correct, which surfaces misunderstandings early.

WORKING QUESTION

Which playbook would improve the quality of your next five buyer conversations the most?



QUALIFICATION AND PIPELINE

Using AI for qualification and pipeline hygiene without fooling yourself

05



Structured analysis helps. Optimistic summaries do not. The aim is a pipeline that reflects buyer reality.

Assistants are good at organizing evidence against criteria you define, such as problem, impact, access to decision makers, process, competition and timeline. They are not good at telling you the truth about a deal the buyer has not revealed. The risk is a tidy summary that turns a hopeful assumption into a confident-looking field.

01 Define criteria in writing

Use your qualification framework, with what counts as evidence for each element.



02 Ask for evidence mapping

Request, for each criterion, the quotes or notes that support it and where evidence is missing.

03 Rate yourself

The seller scores the deal, then compares to the assistant's gap list.

04 Plan the next step

Turn the gaps into questions for the next conversation.



 REQUEST TEMPLATE: QUALIFICATION GAPS

Here are my criteria and my notes. For each criterion list direct evidence from the notes and rate it as supported, weak or missing. List the three most important gaps and a question to close each. Do not assume anything the notes do not state.

 Pipeline hygiene

- Flag deals with no activity for a set number of days and draft a question for the owner.
- Check for missing next steps, close dates in the past and fields left blank.
- Compare stage with evidence in the notes and list mismatches for manager review.
- Summarize pipeline changes for the weekly review from CRM data, with figures taken from the CRM and not recalculated by the assistant.

 NEVER DELEGATE

Forecast calls, discount approvals, contract terms, competitive claims about named rivals and decisions to pursue or drop a deal. These rest on judgment, authority and accountability.

 WORKING QUESTION

How often does a deal in your pipeline sit in a stage that the notes do not actually support?

VERIFICATION HABITS

Keeping claims, numbers and commitments accurate

06



A buyer remembers what you wrote. A single wrong claim can cost more than a week of saved time.

Before any external message or document leaves

- Every product claim traces to approved material
- Prices, discounts, dates and deliverables match the quote or deal record
- The buyer's name, role, company and facts about them are correct
- No confidential information from another customer appears
- Commitments are ones the company can keep and authorized people have agreed
- The tone sounds like you, and the message says something specific to this buyer
- You could explain every sentence if the buyer called to ask



TYPICAL ERROR	EXAMPLE	CHECK
Invented capability	Feature your product lacks is described as available	Compare to the approved product sheet
Wrong fact about the buyer	Outdated leadership or funding detail	Open the source and check the date
Leaked detail	Another client's situation reused as an example	Search the draft for names and specifics
Over-warm personalization	Flattery that sounds scripted	Cut anything you would not say in person
Assumed budget or authority	Notes inferred a decision maker	Mark unknowns and ask



Treat compliance rules on outreach, consent and claims as part of the checklist. Your legal and compliance contacts can tell you what applies to your channels and markets, and these rules change, so check current requirements rather than relying on a general summary.



ILLUSTRATIVE EXAMPLE

A seller asks an assistant for a customer-story paragraph. It blends two real stories from the pasted material and attributes a result to the wrong customer. A search for the customer name in the source text exposes the error before the proposal is sent.

WORKING QUESTION

Which three items on this checklist are most often skipped when your team is under deadline pressure?

MEASURING RESULTS

Measuring whether AI improves selling, not just activity

07

More emails are not a result. Look for better meetings, faster follow-up and cleaner pipeline data.

Define baselines on a few measures before the change. Compare groups or periods fairly, noting that seasonality, territory and deal mix affect results. Be careful with claims of cause. Treat early numbers as signals to investigate, not proof, and avoid rewarding sellers for volume that AI makes cheap.

MEASURE	HOW TO CAPTURE IT	WHAT GOOD LOOKS LIKE
Prep time per meeting	Seller log or sample	Falling with brief quality steady
Time from meeting to recap sent	CRM or email timestamps	Same day
CRM completeness	Share of deals with next step, stakeholders, criteria	Rising

MEASURE	HOW TO CAPTURE IT	WHAT GOOD LOOKS LIKE
Stage conversion	Share moving from discovery to evaluation and beyond	Stable or improving, interpreted with care
Cycle length	Days between stages	Not lengthening because of rework
Buyer feedback	Short check-in or win-loss notes	Fewer complaints about generic outreach
Corrections to claims or proposals	Count caught in review	Falling over time

ILLUSTRATIVE NUMBERS ONLY

If account briefing drops from 40 to 20 minutes across 10 meetings a week, a seller recovers about 200 minutes weekly. The figures are illustrative. Count your own, and only credit the time if it goes into customer-facing work.

Ask buyers when you can. A simple question at the end of a deal, win or loss, about whether outreach felt relevant, tells you more about quality than any activity count.

WORKING QUESTION

Which single metric would tell you first if AI were making your outreach worse rather than better?

TEAM ROUTINES

Coaching, shared libraries and manager habits

08

The best results come when managers coach with the same artifacts sellers use and when good methods are shared.

- Shared library: approved claims, case summaries, objection notes and request templates, with an owner.
- Deal review use: managers ask for the account brief and the evidence map before a review, not just the stage.
- Weekly share: one seller shows a brief or recap that worked and what was edited.
- Call review: coaching on discovery quality, using notes and recaps rather than volume of activity.
- Quarterly refresh: retire stale proof points and update templates against win-loss lessons.

01 Pilot with a small group

Pick a team and two playbooks, such as account briefing and follow-up, for six weeks.

02 Collect examples

Save good briefs, recaps and template edits, with the corrections sellers made.

03 Coach

Review examples in team meetings and agree standards.

04 Scale deliberately

Extend to proposals and qualification once the checks work.

Working with other teams

Align with marketing on approved messaging, with legal on claims and terms, with sales operations on CRM fields and with delivery on handover notes. A seller using AI to summarize what was promised helps delivery only if the summary is accurate and the buyer has seen it. Agree one handover format so nothing depends on individual style.

WHAT TO NEVER DELEGATE

The relationship itself, listening in discovery, honest judgment about fit, and every commitment or price. Buyers deal with people, and sellers answer for what is said.

**WORKING QUESTION**

What would a manager need to see in a deal review to be confident the seller prepared well?

PITFALLS

Common failure patterns, with one illustrative scenario

09



Most problems come from volume, unchecked claims and unclear boundaries rather than from the tools themselves.



- Mass personalization that reads as a template to the buyer.
- Sending claims or numbers that nobody verified against approved sources.
- Recording or transcribing without the consent and notice your rules require.
- Pasting a customer's confidential details into an unapproved tool.
- Letting AI summaries inflate deal stages and the forecast.
- Measuring activity so that cheap volume looks like progress.



**ILLUSTRATIVE SCENARIO (HYPOTHETICAL)**

A seller at a fictional software company uses an assistant to draft a proposal and does not check the delivery timeline. The draft says six weeks, a figure borrowed from a different product. The buyer plans around it. The deal team now has to renegotiate. A review step that checked timelines against the deal desk record would have caught it.

The remedy was procedural: placeholders marked TO CONFIRM for anything commercial, and a named approver. Most of these issues are avoided by declining to let the assistant state facts it was not given.

Warning signs

- Buyers reply with confusion about claims you do not recognize.
- Reply rates fall while outreach volume rises.
- Managers see polished notes with no buyer quotes.
- Sellers cannot say where a statement in a proposal came from.

If you see these signs, tighten the source-of-truth rules, cut volume and return to preparation and follow-up. Review outreach, recording and privacy obligations with your legal and compliance contacts as your use grows.

**WORKING QUESTION**

If a buyer questioned one sentence in your last proposal, could the seller point to its source?



30 / 60 / 90

A first quarter that produces evidence

10



Start with preparation and follow-up, protect customer data and claims, and measure meeting quality before scaling.

First 30 days: ground it

- Set information rules for prospect and customer data and name approved tools
- Build a source-of-truth folder of approved claims, cases and product text
- Baseline prep time, recap speed and CRM completeness for a pilot team
- Try the account brief and follow-up templates on live deals



Days 31 to 60: test it

- Add discovery notes and qualification gap templates
- Start the weekly share and a shared template library
- Introduce the external message checklist
- Review corrections caught and update templates



Days 61 to 90: decide

- Add proposal drafting with TO CONFIRM placeholders and deal desk approval
- Compare baseline and current measures and gather buyer feedback
- Extend to the wider team where checks hold
- Review recording, outreach and privacy practices with legal and compliance



GLOSSARY

Terms used in this publication

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TERM	MEANING
Discovery	The conversation stage where a seller learns the buyer's problems, priorities and process.
Qualification	Judging whether an opportunity fits your offer and is likely to proceed, against defined criteria.
Account brief	A short document summarizing what is known about a prospect before a meeting.
Source of truth	The approved location for current product facts, prices and case material.
Mutual action plan	A shared list of steps, owners and dates agreed by seller and buyer.
Pipeline hygiene	Keeping CRM records complete, current and consistent with reality.
Deal desk	The function that reviews pricing, terms and approvals for deals.
Stage conversion	The share of opportunities that move from one pipeline stage to the next.
Win-loss review	A structured look at why deals were won or lost, ideally informed by buyer feedback.
Personalization	Tailoring communication to the specific buyer's situation, as opposed to inserting a name into a template.
Hallucination	A confident statement from an assistant that is false or unsupported by the material provided.
Consent	Permission from participants to record or process their calls and data, as your rules and local requirements demand.

A note on use

This playbook offers general working guidance and is not legal advice. Check current requirements on recording, outreach and privacy, and your own policies.

TAKE THE NEXT STEP

Take the free Halden assessment at halden.company/assessments, or talk to us at halden.company/contact about turning this into a plan for your organization.

