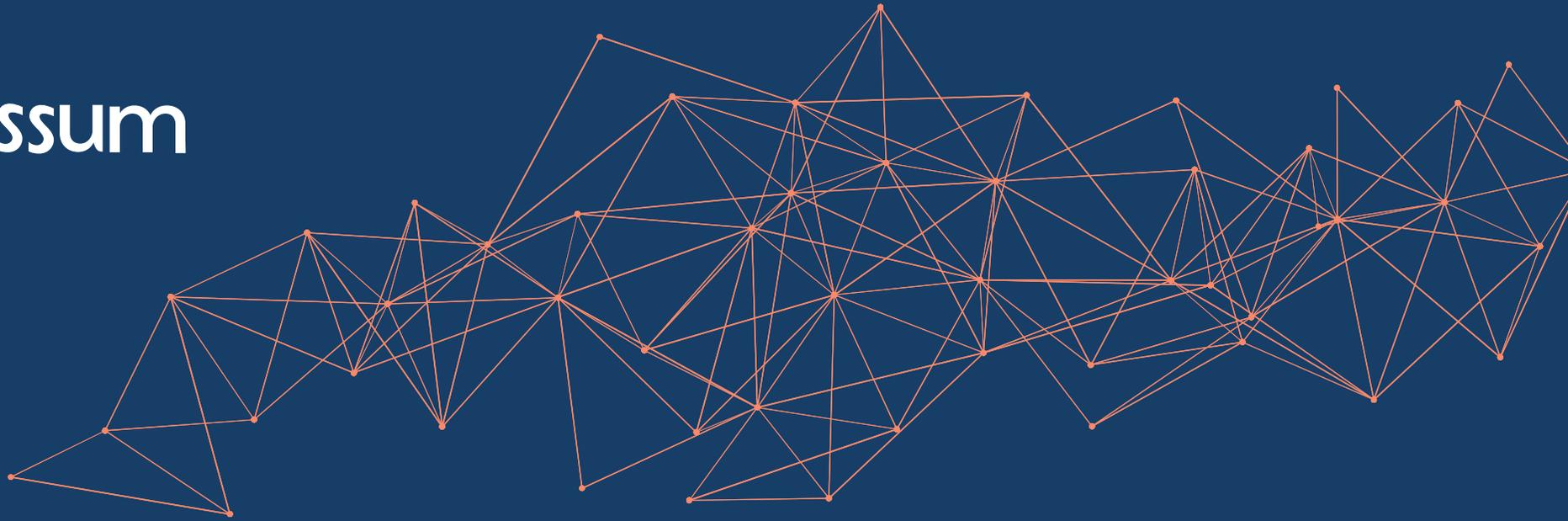# impulssum

AI & Automation in Sales Support

Customer Case

Sales people need to spend more time selling, and being enabled with effective processes around them that increase quality and reduce cost

1	ICP & target list
2	Personalization
3	Outreach automation
4	Sales collateral creation

Sales activities

Sales needs to have more time to have sales conversations

9	Contract Mgmt.
10	Handover to Customer Success
11	Post-sales insights

5	Pipeline Mgmt.
6	Forecasting
7	Sales Coaching
8	Performance Mgmt.

Automations and AI
can help to deliver

- Better quality communications

- Higher volume communications

- Lower cost of sales (time reduction)

Customer case: How to increase quality of outreach, heartbeat volumes and reduce time at the same time when approaching (new) customers

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Important: There are two schools when using AI for more process steps

vs.

Keeping the Human in the Loop

Customer example: ICP & Target list creation

Identify ICP

Select your Ideal Customer Profile (ICP) from LinkedIn.

Set individual filters (demographics and firmographics) to identify potential prospects
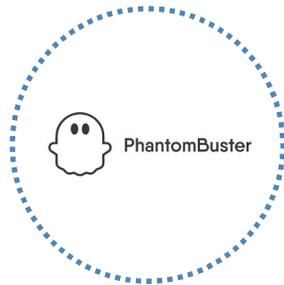
Scrape target list

Scrape the target list from LinkedIn with a tool

Sharpen ICP list

Add additional information to the target list that sharpens your ICP list to the ones that really matter

Example for an MSP: Which antivirus software is used by company?

Add contact info

Add contact information with enrichment tools

Upload to CRM

Upload the target list incl. contact details and first personalization factors (e.g. which antivirus software is used) into the CRM for further activities

Customer example: ICP & Target list creation

This customer is a CRM add-on, that wants to know which prospect has Salesforce, Hubspot or MS Dynamics as they naturally integrate with these CRMs

By identifying individual factors that make a prospect a better fit, we can reduce the noise of prospects in our target list that are not ideal customers
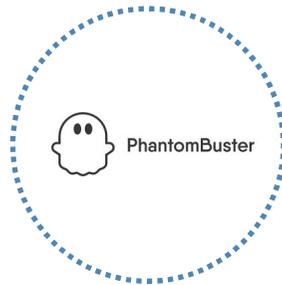
Customer example: Personalization

Research company
Take your target list and have ChatGPT look for open available information about the company

Research person
Take your target list and have ChatGPT look for open available information about the prospect

Scrape LinkedIn
Scrape the last 2-3 months of posts and comments posted by the company and the prospect

Form personalization
Based on the available information, create a list of hooks you could use when approaching this person

Example: "Your recent post over digital sovereignty was spot on, in particular the nuance over extraterritorial regulations"

Upload to CRM
Upload personalization into CRM for further execution

For your profiles we scraped 10 LinkedIn posts and 10 comments that you posted in the last year and then created comment proposals for me

	A	B	C	AA	AB	AC
1	First Name	Last Name	Company Name	Personaliering 3	Personalisering 4	Personalisering 5
2						"Sicherheit für die Energie von morgen" raakt precies de kern van technologische innovatie. Hoe belangrijk zijn digitale tools voor jullie dagelijkse werk? [LinkedIn post 3]
3						Great to see leadership and culture so central at your Executive Event, how do you leverage digital tools to help your teams share best practices and accelerate growth across the portfolio [LinkedIn post 2].
4						Gefeliciteerd met je nieuwe rol bij ▓▓▓▓▓▓▓. Zie jij technologie als een belangrijke aanjager om de ambitie van Europees marktleiderschap te realiseren? [LinkedIn post 1]
5				[LinkedIn post #7]	#8]	Inspirerend hoe jullie in Colombia niet alleen letten op kwaliteit, maar ook investeren in duurzaamheid en lokale gemeenschappen. Het laat echt zien dat fruit bij jullie mensenwerk is. [LinkedIn post #2]

We cannot show real customer results, so we created this quick and dirty personalization in 30-60 minutes. Processing time was longer but worked automatically in the background. Mainly the human in the group checking activities that took time to ensure it is high quality

Once the flow is worked out, tested and proven, you can automate the process using tools like n8n

Once proven, processes can be automated with tools such as n8n

- Work out the flow and get it live

- Track the performance and adjust the process along the way

- Test different topics to see which ones deliver the highest conversion

- Once proven, automate the process using tools such as n8n
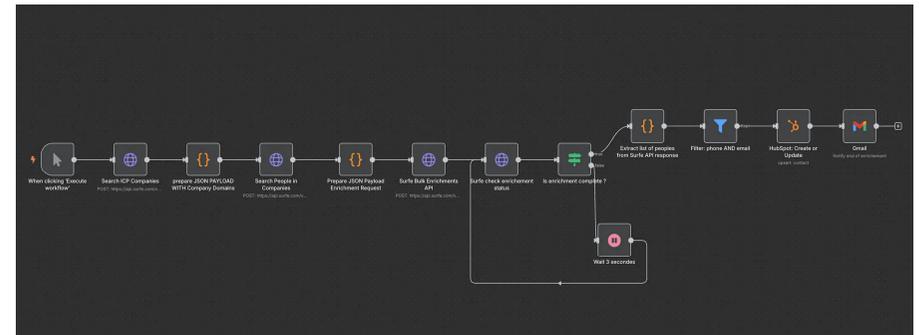
Customer example: Outreach automation

Load leads

Load leads from the CRM into the sales outreach automation tool

Research person

In your sales automation tool, create an outreach automation flow that ideally includes personalization (for conversion reasons)

Automated outreach

The sales automation tool takes over the sales outreach in the name of the sales person
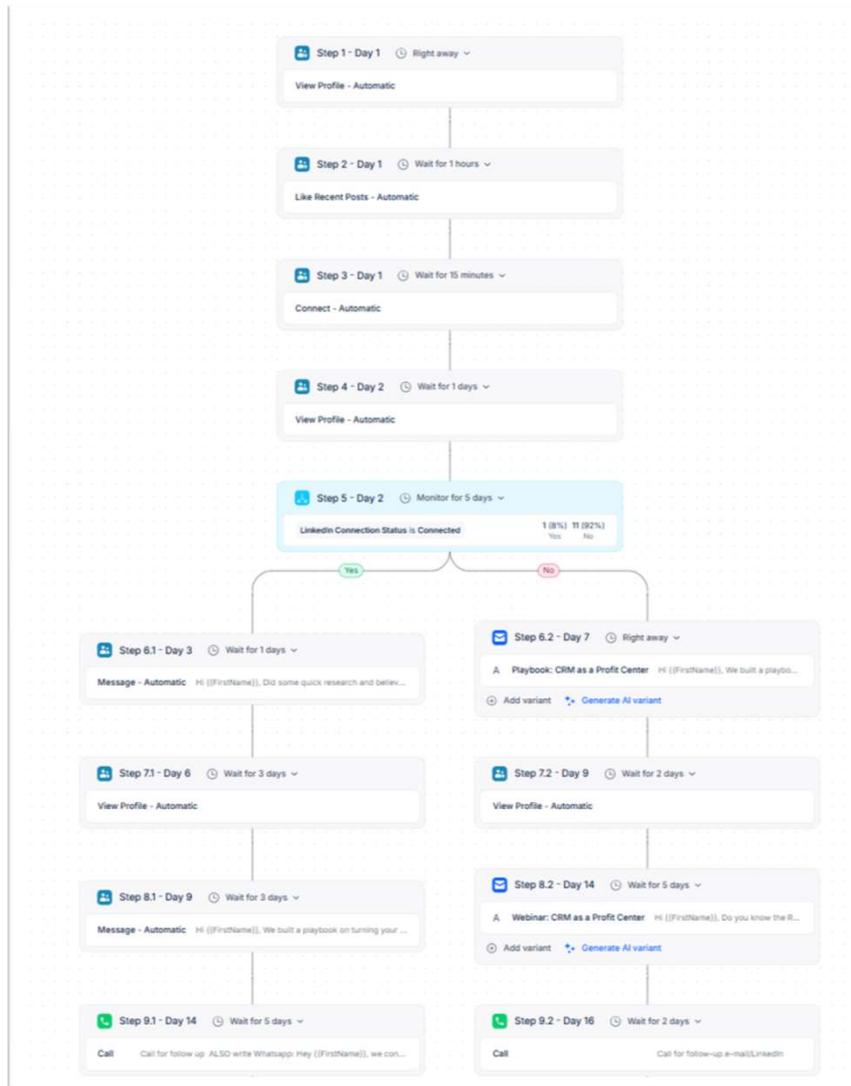
Lead Scoring

Based on reactions and interactions of customers, the CRM can identify the warmest leads for sales to take over

Sales to take over

Sales to take over the outreach to prospects, starting with the warmest leads based on the lead scoring

Example automated sales outreach flow

We see two different routes to go with these tools: Either high volume or high quality
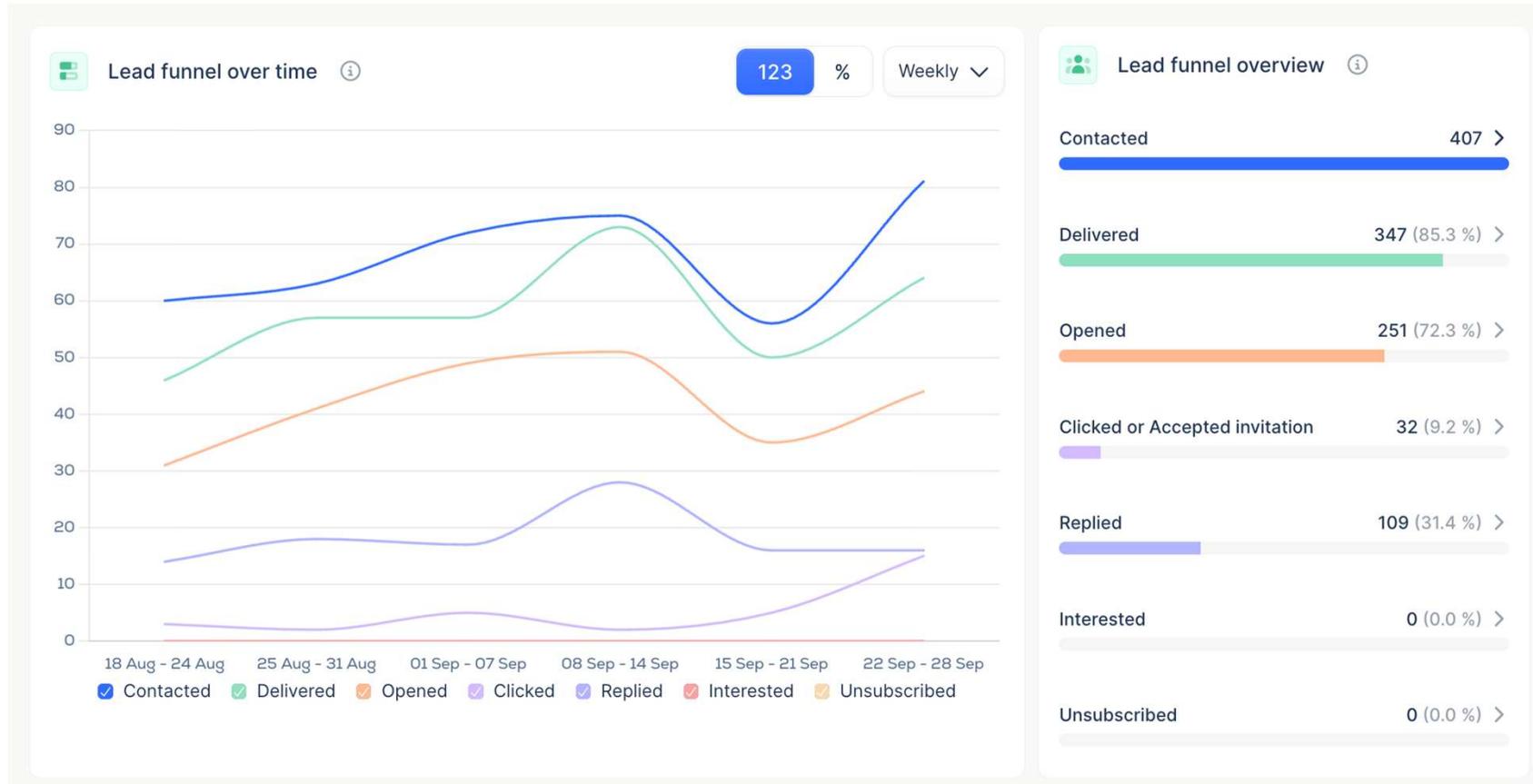
High Volume

High Quality

AI has the potential to combine those two approaches

There are hundreds of tools available for different use cases, it is important to chose the right one with a natural integration to your CRM
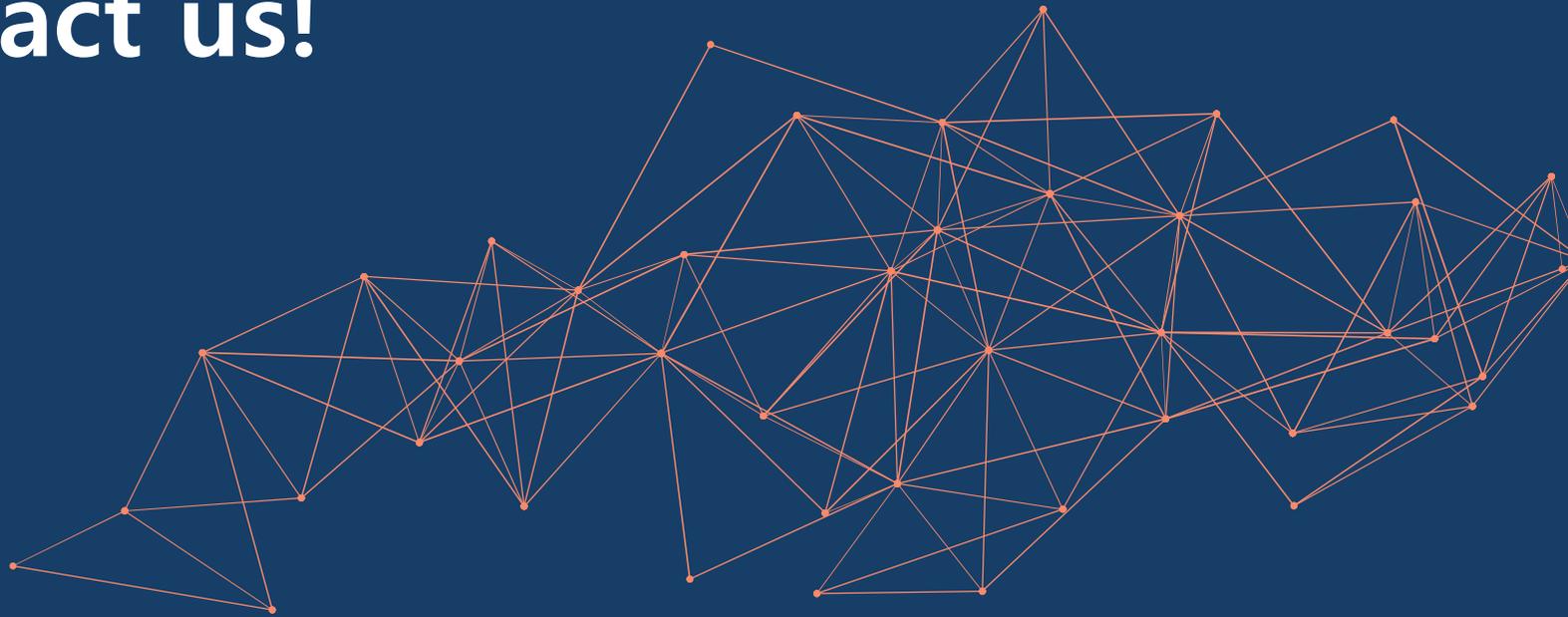
Customer results: Achieving above market answering rates by matching proposition to ICP and personalized high quality outreach

If you would like to discuss this approach for your business, please contact us!

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