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THE ROLE OF AI IN SALES

Balancing your team and technology

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Meet Calldrip

From speed-to-lead software to sales coaching, we're here to help you grow.

Calldrip is a global leader in Conversational Sales solutions, with an emphasis on rapid lead response, coaching, and sales acceleration. Above all, we're committed to helping our customers grow.

We have the experience to prove it:

- 10K users around the world
- 1M+ leads distributed annually
- <1 minute average lead response time
- 6M+ connected calls per year
- 25M+ conversations

We're leaders in the AI sales technology space. Learn more about how we help growth-focused sales teams improve performance.

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Introduction

The sales landscape has never changed more rapidly than it is right now, fueled by the adoption of AI, remote and hybrid work, and buyer empowerment.

In this resource, you'll learn how to balance Artificial Intelligence technology with your sales team to enhance the power of the human connection.

AI is transforming the way business is done. With its ability to provide accurate answers faster than humans ever could, and to automate mundane tasks like data entry or lead generation, AI can be an invaluable asset for businesses looking to increase efficiency and drive growth.

For sales specifically, AI opens new pathways that we couldn't have imagined even six months ago. AI-driven insights help sales teams to create more meaningful interactions with customers, while still maintaining their personal touch, thereby creating relationships that will last long after the sale is made.


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From our perspective as experts in the sales space, we see AI as a tool to support human connection. After all, people (still) buy from people, especially when making complex decisions.

In this resource, we'll explore how your sales team can leverage AI to improve customer experiences, improve efficiency, and empower them to make better decisions in less time.

3 Steps for Sales Managers to Lead with AI

Today's sales managers can learn to lead with AI in a modern sales environment. While technology can never replace genuine human interaction, it can help make the sales process more efficient and effective.
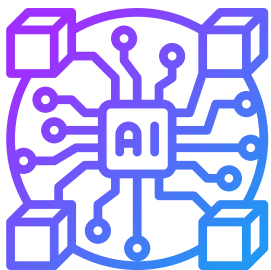
Step 1: Define How You'll Use AI

The first step is define how you'll use AI. You need to understand where AI will help your team and what kind of impact it will have on their roles.

Think about use cases and desired skills, and allow that to guide your journey. We'll share a few powerful use cases later, such as automation and analytics.

Ultimately, knowing how you'll use AI technology - and why - will help you measure success, and also enable you to communicate changes effectively.

Step 2: Train Your Team How to Use the Technology

Once you've identified what you want AI to do for your team, it's important to find the <u>right technology for your business</u>, and make sure that your team knows how to use it.

They'll need to understand the basics of how AI works, as well as more specific training like how to write an effective query. Using AI to get quality results and insights does require a new set of skills.

Step 3: Find the Balance of Team & Technology

As a sales leader, your goal is to strike the balance between your team's talents and skills, and the available emerging technology.

It should be made clear that AI is there to support them—not replace them. Even more, AI technology can extend your sales representatives' availability, responsiveness, and reach.

In addition to coaching for skills like active listening, sales managers can also coach their teams to use AI as a tool that helps develop connections.

Again, AI isn't and can't be used as a replacement for human empathy and understanding. Communicate this with your sales team, so they know AI isn't there to take away their jobs, just to make them easier and more efficient.

7 Benefits of AI in Sales

AI is revolutionizing the sales process. Today, you'll learn a few of the most powerful benefits of AI in the modern sales environment.

INCREASE EFFICIENCY & PRODUCTIVITY

AI unlocks complex automations, so salespeople can focus on higher-value activities such as building relationships with prospects.

IMPROVE AVAILABILITY

With AI, your brand can be available, even when members of your team are on holiday or asleep.

RESPOND MORE QUICKLY

AI-powered rapid lead response means you can respond to leads, prospects, and customers in seconds.

IMPROVE CUSTOMER EXPERIENCE

With AI, sales teams can gain access to real-time customer data that can be used to personalize experiences and drive better results.

DEVELOP DEEPER INSIGHTS

AI tools like sentiment analysis, customer profiling, and coaching provide insights that unlock strategic insights for managers and team members.

SUPPORT BETTER SALES PERFORMANCE

It also provides actionable insights into customer behavior, enabling them to target the right leads at the right time while optimizing lead conversion rates.

ENCOURAGE US TO BE MORE HUMAN

The rise of AI can motivate us to focus on doing what only humans can do - connect about our experiences, emotions, and perspectives.

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7 Use Cases for AI in Sales

AI can be used in a wide range of situations to improve your sales, from lead generation to backend automation and everything in between. So, let's dive in!

1. Lead Generation

AI can help sales teams generate leads by analyzing vast amounts of data to identify potential customers. By leveraging predictive analytics and machine learning algorithms, AI can analyze customer behavior patterns and help sales teams target the right audience with the right message.

AI-powered lead generation tools can help you:

- Generate more traffic.
- Convert more leads.
- Re-engage cold prospects.
- Spark more conversations.
- Open more opportunities.

By balancing this technology with you team's unique ability to build relationships, you'll be empowered to truly scale your sales.

35%
of businesses worldwide used AI in 2022. (Source: IBM)

2. Rapid Lead Response

Once a lead has been generated, it's essential to respond quickly. Studies show that leads are more likely to convert when contacted within 5 minutes of submitting a form or making a phone call. AI-powered chatbots can provide instant responses to customer queries, while automated lead routing systems can ensure that leads are immediately directed to the right salesperson.

Unfortunately, even though the data is clear, most businesses are still too slow to respond to their internet leads. A core part of our Calldrip product is designed to fix this. We do this by connecting businesses to shoppers in less than 60 seconds - and we do this literally faster than anyone else on the planet.

But what happens when the sales team isn't available to answer the phone? Or after hours? Or even more importantly, what happens to leads that require weeks of follow-up to commit to an appointment, and it's really just become too tedious for the sales team to follow-up?

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This is where automation and AI can really come into play, and be an enormous help to any business by helping you automatically respond, even when you're not available.

We're proud to introduce Calldrip's AI-Powered Sales Assistants.

You can have up to 5 assistants that are named differently and trained differently. For example, you could have one for sales, one for success. We'll walk you through the process of setting up your assistant, including name, department, and goal. This means you can instantly respond to leads - automatically - even when you're out of office or away. How's that for efficiency? Try it out for yourself:

SEE IT IN ACTION

3. Lead Nurturing

Once a lead has been identified and contacted, it's crucial to keep them engaged with relevant content and personalized communication. AI can help sales teams automate the lead nurturing process by analyzing customer behavior patterns and providing personalized content recommendations based on their interests and preferences.

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Lead nurturing solutions that are powered by AI may automatically follow-up, until the lead engages in certain activities that signal they're ready for a live sales conversation.

If you don't immediately connect with a prospect, our AI assistant will follow up, creating and executing a unique lead nurturing sequence designed to connect with and convert leads. Even better, Calldrip's lead nurturing solutions are customizable; we work with you to set up your assistant based on your needs.

4. Listen to Your Customers

To effectively nurture leads, sales teams need a deep understanding of their customers' needs and preferences. AI can help sales teams build detailed customer profiles by analyzing customer behavior data, including purchase history, website interactions, and social media activity.

One way to build these insights is with AI-powered call monitoring.

Manually monitoring every call is tedious and time consuming. AI Monitoring automatically reveals actionable insights on every conversation, and alerts you to those situations that need attention in real-time.

Calldrip's AI-powered call monitoring solution automatically records and transcribes sales calls, conducts sentiment analysis, and generates call summaries. Take it a step further with tags that highlight calls for deeper review and strategic analysis, and red flags that indicate problems as they're happening.

5. Backend Automation

AI can help sales teams automate the backend processes involved in sales, such as data entry, lead scoring, and lead prioritization. By automating these processes, sales teams can focus on building relationships with customers and closing deals.

Calldrip's sales enablement solutions include unique automations. In addition, we provide detailed insights and empower you to build extended automations in your own CRM.

6. Call & Lead Scoring

The full lifecycle of sales performance improvement is: respond, nurture, score, and coach. Scoring leads and responses helps you understand what's working, and assess your overall team's performance to customizable KPI's.

Our AI-powered technology helps you at every step, including scoring and analysis. Calldrip's AI Scoring will automatically measure and score every call to align performance and pinpoint opportunities for improvement.

Respond

Nurture

Score

Coach

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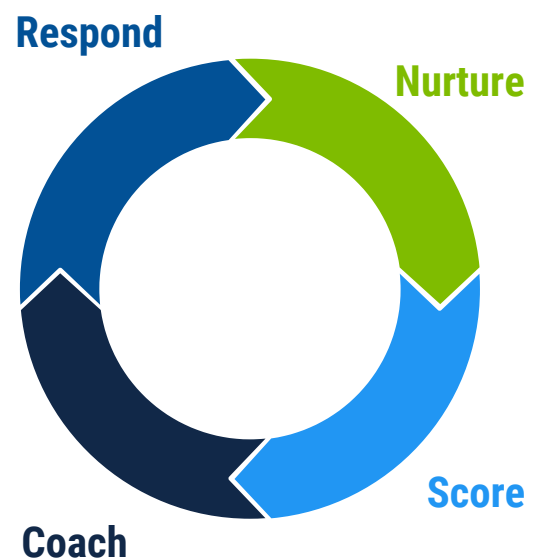
Even better, our AI solution generates call scorecards that automatically evaluate sales calls on the 5 key factors of great sales calls (more on these later in the resource). With these scorecards, sales managers are empowered to lead more effective coaching sessions. We'll spend more time exploring AI in sales coaching next.

7. Sales Coaching

AI can also be used to coach sales teams by analyzing their interactions with customers and providing feedback on areas for improvement. By analyzing customer conversations and providing real-time feedback, AI-powered coaching systems can help sales teams improve their communication skills and close more deals.

We leverage AI throughout our all-in-one conversational sales enablement software, and coaching is no exception. With AI, we generate call scorecards that automatically evaluate sales calls on the key elements. That way, sales managers are empowered to lead more effective coaching sessions.

With AI, sales teams can increase efficiency, productivity, and customer satisfaction while freeing up time to focus on building relationships and closing deals. At the end of the day, this empowers salespeople to develop even stronger connections.

A Note of Caution about Leveraging AI

The human connection is maybe more important now than ever before. Many people are anxious about the role of AI in the future, and don't want to lose the interpersonal moments that make every day special.

That's why it's still critical to deliver a quality, personalized experience, and build a personal connection - even and especially when leveraging AI. This is particularly true in high value purchases. A chatbot simply can't close that deal.

AI isn't the end-all, be-all solution. After all, 60% of customers feel brands have used tech to de-prioritize the human element of customer experience.

The risk with AI is that your customers have the uncomfortable feeling of not being able to "actually talk to a real person." That's why we strongly believe that AI shouldn't replace people, but instead support and enhance the skills and personality of your team.

60%

of customers feel many brands have used tech to de-prioritize the human element of customer experience. (Source: PwC)

Human interaction still matters - and always will. Research shows that human conversations continue to drive complex purchases and important decisions. More than 80% prefer to interact with a real person even as technology improves.

35%

of consumers would be willing to pay more for some sort of human interaction. (Source: PwC)

Even as AI becomes embedded in everyday interactions, we believe that it can help facilitate one-on-one conversations, but it can't replace human connection. After all, people (still) buy from people.

6 Principles for Salespeople in an AI World

Success with AI isn't guaranteed.

At Calldrip, we've been working to develop AI solutions that support human connection and conversation. In doing this work, we've identified six principles that we believe should guide decision-making in a sales environment that's transformed by artificial intelligence.

EDUCATION

We need to educate ourselves. It's our responsibility to understand these new tools, including how they work, risks, and opportunities.

PREPARATION

We need to prepare ourselves. We're living through a paradigm shift. Now is the time to prepare for change and design a strategy that reflects the new reality.

PROFESSIONAL DEVELOPMENT

We need to have the proper tools and skills. While this will be different for each business, know that both services and solutions like Calldrip exist to empower you with the right tools and skills.

COMMUNICATE

We need to communicate. Navigating big changes gracefully - even uncomfortable ones - is all about being intentional, and communicating clearly throughout the process.

PIVOT

We need to understand what works - and what doesn't work. Not every new AI widget will be a win, and that's okay. Be prepared to test, learn, and pivot when necessary.

EMBRACE CHANGE

We need to make changes to get the result we want. The world is changing, and we need to change with it in order to achieve our growth goals.

We hope that embracing these principles allows you to be even more successful with artificial intelligence as time moves on.

AI is a new technology that is also evolving rapidly, so if you experience "growing pains," know that you're not alone. As we've seen time and time again, knowing what to expect makes it easier to anticipate and navigate challenges. That's why we'll share a few common challenges you might experience when implementing AI next.

3 Challenges of AI Adoption in Modern Sales

There are a few common challenges that sales leaders face when trying to adopt of AI technology in their company. Our hope in sharing these challenges isn't to discourage you. It's simply to help you plan for hiccups and navigate them more easily. Know that if you experience frustration, you're not alone. With that said, here are three challenges you may experience:

1. Adopt New Skills

Implementing AI in sales requires new skills, like learning how to develop, analyze, and optimize these solutions. At Calldrip, we navigate this challenge by doing most of the heavy lifting for our customers. We're there to create your AI tools with you, for your business, based on your input.

2. Healthy Skepticism

Some sales teams may resist using AI in their workflows, citing risks about poor quality, losing control or jobs being replaced. This is fair, but the truth is that there are tight boundaries to what any AI tool can do - or can't do. With a partner like Calldrip, you're in charge.

3. Data Quality

AI systems rely on high-quality data to be effective, and many companies struggle with inconsistent or poor data quality. Again, a partner will help you gather, clean, and leverage your data.

Real-World Tips for Success Using AI in Sales

Now, it's time to share a few of our learnings from working with thousands of people around the world on implementing AI in sales.

1. Prioritize the speed of response, striking up a conversation at the peak moment of interest drives sales velocity.

Almost 80% of customers buy from the company that responds to their inquiry first. Encourage your sales team to meet prospects at the right moment, with the right information, on the right channel.

Striking up a conversation at the peak moment of interest:

- Creates a personal connection with the prospect
- Delivers a premium customer experience
- Stops shoppers from moving to a competitors website
- Takes the prospect out of the competitive market

AI supercharges your ability to respond quickly, with the right information, in a personalized and automated way.

78%

of customers buy from the company that responds first. (Source: Convolo)

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2. Have a plan when you pick up the phone.

When you actually get on the phone with a lead, prospect, or customer, it's critical to have a plan. Ask investigative questions to understand the customers needs, and have a concise script that can help drive the sale.

If you do this, you'll be ahead of the pack. Data shows that 80% of sales consultants don't have a plan when they make an outbound call. Being prepared is a competitive advantage.

There are a few steps:
- Proper Intro
- Take Control of the Call
- Book the Appointment
- Finish Strong

Once you have a plan designed, AI can help you automatically evaluate your calls versus your goals. This unlocks real-time coaching opportunities, as well as positive feedback loops.

3. Monitor customer interactions and provide continuous sales coaching rooted in reality.

This is where the combination of call monitoring and coaching can really help you level-up your game. Call monitoring provides transparency and insight about what's happening during the call, while coaching allows your team to learn from those experiences.

This is another way that Calldrip enables you to outperform the competition. Data shows that companies with dynamic coaching programs achieve 28% higher win rates. Our sales coaching software unlocks just that opportunity.

Even better, we leverage AI to help make that coaching even more effective.

The Impact of AI on Sales Jobs

AI will change everything - including the job landscape. Here are three impacts we expect to see due to AI.

01 —————— New Jobs Will Emerge

Managing AI will require new sets of specialized skills, and new higher level job roles.

02 —————— More Strategic Work

As AI automates less complex tasks, sales reps will be freed up to focus on more strategic work like relationship-building.

03 —————— Upskilling is Essential

As AI becomes more prevalent in sales, every sales rep will need to develop new skills, such as data interpretation.

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In Conclusion

Success with AI will largely come down to how well you balance your team with the available technology.

In our digital age, it's essential to prioritize the value of human connections in sales.

Whether you're a seasoned sales professional or just starting out in the industry, incorporating AI into your sales process can help you achieve greater success and open the door to new opportunities.

This is all about achieving the right balance between emerging technology and your talent, to generate more high-quality and high-value human connections. By employing these insights and best practices tips, you can cultivate more meaningful connections with shoppers and ultimately drive more sales.

"With the power of technology, we have a unique opportunity to revolutionize our customer service approach and breathe new life into those good old days of customer service, marking the dawn of a new era in sales.

Here at Calldrip, we're not just imagining this transformation – we're living and leading it."

KOBY JACKSON
CEO, CALLDRIP

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THANK YOU

We're committed to helping salespeople be successful today and tomorrow. That's why we're hard at work develop AI-powered sales enablement solutions that unlock sales potential.

So what are you waiting for? Start exploring the possibilities of AI in sales today! At Calldrip, we'd be happy to show you how.

LEARN MORE