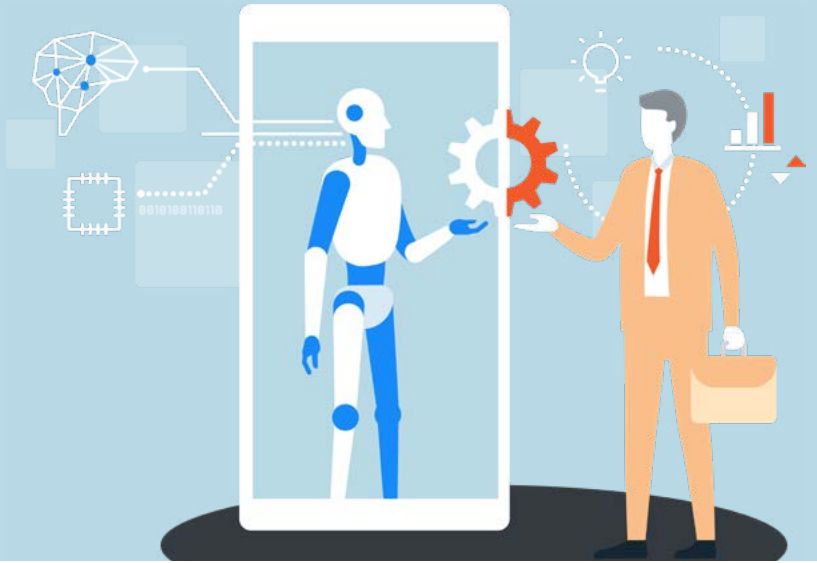


Take the Road to AI-Guided Selling

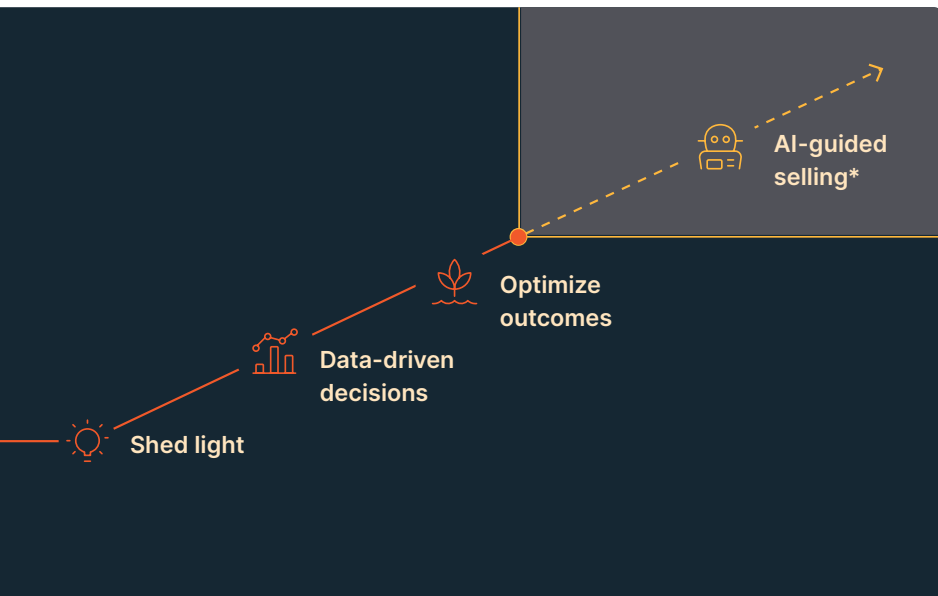
AI-guided selling is here and early adopters are beginning to use it.



Where are you on the road to AI-guided selling?

And how can you prepare your business to take full advantage of it? If you're already using a Sales Enablement solution, you're on the right track. AI-guided selling requires data based on integration with multiple sources. For sellers to take advantage of AI-guided selling, your systems need

to be integrated, your sellers need to use them consistently, and you need to have a data-centric mindset. The more comfortable your sellers are with the idea of data leading to improved sales performance, the more comfortable they'll be with AI-powered recommendations.



Here are the stages organizations can use to fully prepare for the new AI-guided selling solutions.

Shed Light

Organizations start with in-application reports and out-of-box dashboards that provide a snapshot in time. This historical information about what content was used by sellers and how buyers engaged with it can be analyzed to improve future performance.

Step up by:

- Acquiring an executive sponsor
- Making dashboards and reports available to teams
- Asking teams to present data-based reports
- Basing future planning on reviews of historical data
- Establishing KPIs and reporting against them
- Measuring platform use by teams

Goal: Build a data-focused and data-use culture

Goal: Break down team silos and incorporate data use in processes, all of which drives the integrations and builds the habits that will enable rich data for your AI

Data-driven decisions

As organizations become more sophisticated, they use customized dashboards and reports that focus on specific teams, industries, segments, or stages of the customer journey and use the information to make tactical or strategic changes that bring tangible results.

Step up by:

- Making cross-team reports based on data a requirement
- Educating users on how to fish for data
- Driving platform adoption
- Defining guidelines for using all sales and sales support systems in a similar manner to capture consistent information at each sales stage
- Integrating the sales enablement platform with your CRM, email, and other key sales systems
- Defining cross-team common KPIs and beginning to hold teams accountable to them
- Requiring sellers to keep account records in the CRM updated at all times

Optimize outcomes

Organizations at this stage start to take full advantage of existing AI capabilities, such as those built into reporting, to enable your revenue-generating teams. They can then leverage data from all sources, integrate it with the data in the sales enablement platform, and use the platform and BI tools to answer even very specific business questions.

Step up by:

- Dedicating resources to reporting and analytics
- Using revenue-based data to set targets
- Using reporting and employee performance review targets to ensure that team members across the organization are using systems regularly and according to the guidelines
- Incrementally improving on targets, using data and the derived insights to make constant changes
- Delivering team level and individual insights at least weekly
- Fully integrating the sales enablement platform with other core sales engagement solutions (Outreach, Salesloft, etc.)
- Fully integrating it with CRM systems (Salesforce, CRM Dynamics, etc.)
- Fully integrating it with email, calendaring, and conversational intelligence platforms



Goal: Ensure full integration of systems and use of them in a way that will continually enrich buyer and seller data, to ensure a solid foundation for your AI



AI-guided selling

Your sales enablement platform will bring AI-guided selling to your organization. The AI will bring with it learnings, but it delivers benefits based on the information fed to it by your integrations and your sales people as they follow the good habits you've established.

Take full advantage by:

- Educating sellers and others on AI-Guidance and how the AI comes to its conclusions
- Showcasing the benefits and revenue impact of AI-Guidance
- Integrating new systems quickly

AI-guided selling brings significant benefits to your sellers by:

- Proactively providing recommendations based on past engagements, similar buyers, and interests specific to each contact.
- Empowering sellers to more effectively engage with buyers and at the right time.
- Keeping sellers up-to-date without having to do excessive coaching and training, by delivering the latest playbooks, engagement history, and content.

Goal: Get sellers comfortable with and fully using AI-guided selling. Build the virtuous cycle of use-data-guidance to continuously improve your AI and the results it delivers



This content is based on the larger white paper, *Preparing for AI-Guided Selling: A Roadmap for Forward-Thinking Businesses*. To fully prepare your business to take advantage of AI-guided selling, [read the white paper.](#) →