



## CHECKLIST

# Build an AI-First Sales Org with the Right Tech Stack

Revenue operations leaders everywhere are under pressure to make sales faster, smarter, and more predictable. But the biggest impact opportunity today doesn't come from piling on endless tools. It comes from **integrating AI into the systems, workflows, and processes** your sales org uses every day.

With so many point solutions flooding the market, though, how do you separate hype from real operational value?

Use this checklist to evaluate exactly where and how AI can drive the biggest impact across your sales motion—and how to cut through the clutter to pick the tools that will make it happen.

## The new execution layer

Agents aren't here to replace people, they're here to help people work faster and smarter. And the way teams work typically covers two areas: **knowledge and action**. You're either learning or planning how to do a task, or you're doing it. These are the areas where agents have the biggest opportunity to make an impact. Let's explore them a bit more (and how you can use both):

### Knowledge agents

Knowledge agents help research and assemble information faster and with far greater reach. For example, you could build custom GPTs to practice a sales pitch, improve your outbound messaging, or surface key account information to prep for a call. Tools like LLM chats and copilots can return synthesized knowledge and analysis so you can go take action yourself.

- ☐ Simulate real-world sales conversations and provide feedback
- ☐ Analyze and improve emails for tone, clarity, and relevance
- ☐ Pull and summarize CRM, email, and call data into Slack before key meetings

#### TOOLS

Gong, Clari, ChatGPT, Clay

### Action agents

Action agents can automate and meaningfully complete real activities beyond surfacing knowledge (with speed and accuracy, too). Think: creating a quote, updating CRM notes, issuing a discount, or transferring a lead. They're taking actions in software themselves, right within your tools and workflows.

- ☐ Automate activity capture (calls, emails, meetings)
- ☐ Auto-update opportunities based on signals
- ☐ Enrich contact and account data in real time

#### TOOLS

Tango.ai, Zapier, Make, n8n

# Top-of-funnel acceleration

Tango

## Outbound prospecting

Outbound is still the top-of-funnel engine for many teams—but time-consuming and hard to personalize at scale. Sales reps often waste hours researching prospects, guessing at personalization, or sending low-conversion messages. AI can help turn cold outreach into a smarter, higher-yield effort.

- ☐ Automate prospect research with enrichment and insights from CRM and the web
- ☐ Write personalized outbound emails based on persona, firmographics, or triggers
- ☐ Suggest optimal send times and sequences

### TOOLS

Clay, ChatGPT, Lavender, Regie.ai, Apollo, Seamless.ai

## Lead scoring & routing

When sales teams rely on static, rules-based scoring, they miss hot leads and waste time on bad ones. Lead behavior changes fast, and your scoring needs to keep up.

AI-powered lead scoring models adapt to real-time behavior and firmographics, routing leads to the right rep based on potential to close.

- ☐ Predict lead quality based on behavioral and firmographic data
- ☐ Auto-route leads to the right rep based on likelihood to close

### TOOLS

MadKudu, Qualified, Salesforce Einstein

# Mid-funnel sales enablement

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## Content recommendations

Reps often spend hours hunting for the right case study, email template, or deck—which slows down their outreach and reduces impact. AI tools can surface the right content at the right time, recommending messaging and materials based on deal context, persona, and past performance.

- ☐ Suggest next-best actions based on deal stage or persona
- ☐ Recommend winning content based on similar past deals

### TOOLS

Highspot, Seismic, Drift, Showpad

## CPQ & contracting automation

Deals often stall in the final mile when they're bogged down by pricing complexity, approval chains, or legal redlines. These delays hurt momentum and increase the risk of slippage. Dedicated CPQ tools can be customized to build quotes faster and new AI functionality can auto-complete key fields, spot blockers in the approval process, and suggest shortcuts to get contracts over the finish line faster.

- ☐ Auto-fill quote fields and product configs
- ☐ Detect approval delays and recommend the fastest path through red tape

### TOOLS

Conga, DealHub, Salesforce CPQ with AI, Tango.ai (as an action agent)

# Future forecasting and visibility

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## Pipeline health & risk detection

Manual forecasting is riddled with gut feelings, bias, and inconsistency. That creates a shaky foundation for revenue planning, which puts leaders at risk of missing targets without knowing why.

AI solutions can monitor pipeline health in real time and give leaders a more objective and data-driven forecast—removing bias and improving forecast accuracy at a deal-by-deal and a pipeline level.

- ☐ Use predictive models trained on historical data
- ☐ Identify risk early in the deal cycle
- ☐ Generate forecast accuracy insights and strategy recommendations

### TOOLS

Clari, BoostUp, InsightSquared, Tango.ai (as an action agent)

## Reporting & analytics

Static dashboards hide nuance and trends that matter to your forecast and strategy. That's why leaders struggle to extract the insights they need fast enough to take action.

AI analytics can answer plain-language questions on the fly and surface unexpected trends—making your dashboards more interactive and decision-ready.

- ☐ Answer natural-language queries (e.g. "What deals are at risk this week?")
- ☐ Proactively surface anomalies and performance trends

### TOOLS

Salesforce Tableau Pulse, ThoughtSpot, Looker with AI

# How to prioritize your AI investments

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Ask yourself:

- ✓ Where is your team wasting the most time?
- ✓ Where are manual processes causing revenue leakage?
- ✓ What systems already have clean, structured data to build on?

Becoming an AI-first revenue org isn't about stacking point solutions; it's about enabling smarter execution across your entire go-to-market engine. If you're not sure where to start, remember that the real impact of AI lies in the systems your org uses every day. So start with the biggest one: your CRM. It's the single source of truth, but also the single source of mess.

And the good news is you don't need a giant rollout. You just need fast, focused wins that show results and create momentum. By implementing AI directly in your CRM, you can quickly solve high-friction bottlenecks, clean up data, and automate execution where it matters most.