


AI Solutions Sales Blueprint

A Conversation Framework for MSPs Selling AI to SMB Clients

For Managed Service Providers

Structured Approach: Prep → Discovery → Framing → Pilot → Close

Produced in collaboration with peers of the ASCII Group AI Committee

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Introduction

This is a conversation blueprint MSPs can use to confidently sell AI solutions to SMB clients.

It's structured like a real client meeting, following a logical progression from preparation through to closing:

- Pre-meeting preparation
- Discovery
- Framing and positioning
- Use case exploration
- Risk and governance
- Pilot project design
- Proposal and close

Key Principle: The best way to understand and sell AI is to be using it yourself. Use AI prompts and collaboration at every step of the journey.

Pre-Meeting Preparation

How to Use AI for Preparation

Use AI prompts to help you prepare for the meeting. The prompts should help you research the client's industry, understand their likely challenges, and identify relevant use cases.

Walk In With 3 Likely Use Cases

Before the meeting, use AI to prepare:

- Their industry pressures (margin, staffing, compliance, customer demands)
- Their known stack (M365/Google, accounting, PSA, CRM, LoB apps)
- 2-3 use cases that are common and safe for SMBs

Pro Tip: Bring 1 use case that is operational (saves time) and 1 that is customer-facing (revenue protection/growth).

Common SMB AI Use Cases

- Internal knowledge assistant (policies, SOPs, HR/IT FAQs)
- Email and document drafting with guardrails (quotes, proposals, responses)
- Ticket triage and summarization (support efficiency)
- Meeting actions (minutes, tasks, follow-ups)
- Invoice/PO extraction (AP efficiency, fewer mistakes)

The Meeting Flow

Opening and Positioning

Start With the Customer in Mind

Prompt the AI for this type of client and business vertical: concerns, objections, and wins for others in their industry.

Remember the Client Perspective

What SMBs fear: buying "AI" and getting chaos, risk, and no ROI.

What they want: less work, fewer errors, faster decisions, happier customers—safely.

What to Avoid Saying Early

- "We implement AI across your org" (too big, scary)
- "Agents will transform everything" (sounds experimental)
- "It's easy" (they've been burned before)
- "Just connect your data and go" (security alarm bells)

Focus on Business Problems

Use the pre-meeting prompt results to start with the right positioning:

Business strategy is WHAT you want to solve. Technology (including AI) is HOW you solve it.

Sell them the answer to a business problem. Don't sell a shiny tool.

"We help you solve business problems, saving you time and money or increasing capacity and outputs while also making sure that the solution is sustainable and secure."

Discovery Framework

Most MSPs lose AI deals because discovery stays at the "features" level. You need to get to economic pain and operational bottlenecks.

"Most SMBs don't need 'AI everywhere.' They need one or two workflows where time is leaking, done with controls and measurement. If you're open, I'll ask a few questions to find the best starting point, then I'll recommend a small pilot with clear success metrics."

Reframe AI for the Client

Clients don't buy "AI." They buy outcomes with safety.

"In one session we'll identify the top 3 workflows worth automating and what it will take to do it safely. If we can improve one workflow by 30-50% with controls and measurable results, it pays for itself quickly and then we expand."

The 11 Discovery Questions

Time + Labor

0. What work is repetitive?
1. Which 2 roles are struggling with admin work right now?
2. If we gave your team back 10 hours a week, where would it go?

Revenue + Customer Experience

3. Where do delays cost you deals: quotes, follow-ups, onboarding, support?
4. What does a 'slow response' cost you in churn or reputation?

Knowledge + Risk

5. Where does knowledge live: people's heads, email, SharePoint/Drive, or nowhere?
6. What happens when your best person is off sick for a week?
7. What data would be catastrophic if it leaked?

Systems + Readiness

8. Which systems are the source of truth: M365, CRM, accounting, PSA, Line of Business apps?
9. Do you have SOPs written down, or do people 'just know'?

The Magic Follow-Up: Quantify time and AI becomes a business case, not a gamble.

"How many hours per week does that consume, and what's the fully loaded hourly cost?"

Problem Prioritization

Select the top 1-3 problems to solve using a prioritization methodology:

Priority Methodology	Action
High Value, Low Effort, Low Risk	START HERE - Quick wins that build confidence
High Value, High Effort, High Risk	Plan for later - Requires more resources
Low Value, Low Effort, Low Risk	Nice to have - Consider if time permits
Low Value, High Effort, High Risk	Avoid - Not worth the investment

Recommendation: Start with items that are High Value, Low Effort, Low Risk. These quick wins set the stage for what is possible, build confidence, and show clear ROI right away.

Solution Design

Where AI Can Help

Use the client's answers to guide them into categories that match common AI value:

Ask These Selection Questions

- Do you want to reduce time spent writing, summarizing, or responding?
- Do you want faster decisions based on internal information?
- Do you want fewer mistakes and more consistency?
- Do you want better customer response times and follow-up?
- Do you want to capture and reuse knowledge, so it doesn't walk out the door?

Explore with Targeted Questions

Communication and Writing

- Which emails or documents do you write repeatedly?
- Which responses need to be consistent across the team?
- Where do staff struggle to get the tone right or include the right details?

Search and Knowledge

- What questions do staff ask repeatedly?
- What information is hard to find quickly?
- What do customers repeatedly ask that staff answer manually?

Operations and Workflow

- Which tasks involve checking steps, updating records, or routing work to the right person?
- Where does work get stuck waiting for a person to triage or assign?
- What reports are produced each week or month manually?

Customer Service and Tickets

- What types of tickets are most common?
- Which tickets require summarizing long threads or past history?
- Where do technicians spend time writing notes that are rarely read?

Prioritize the Best First Use Case

Use these questions to pick a first project that will succeed:

- Which problem has the highest volume? (happens daily or weekly)
- Which problem is easiest to measure? (time saved, cycle time reduced, fewer errors)
- Which problem is lowest risk? (minimal sensitive data, low chance of harm)
- Which problem has a clear workflow? (defined steps and inputs)
- Which team is most willing to adopt and provide feedback?
- If we could solve only one thing in the next 30 days, what should it be?

The Pilot Project

Making It Easy to Say Yes

SMBs often can't approve large unknown projects. Prove value and iterate.

"Based on what you said, the best first workflow is X because it's high-volume and low risk. We'll implement it with permissions and approvals, measure time saved, and review results in 2-4 weeks. If it's working, we roll into a monthly improvement plan."

Key Messages:

- "We start small, prove value, and scale."
- "Let me take this away and come back with a full project plan and quote."

AI Readiness and Use Case Workshop

A 60-90 minute workshop with the following goals:

- Remove perceived risk and complexity
- Prove value through concrete examples
- Take the shortlist of 3 workflows and get granular: departments, owners, current SOPs, data
- Choose one workflow in one department to start with
- Identify all people to be engaged in the project

AI Starter Project Structure

Get practical and detailed with 1 workflow (maximum of 3):

Document Processes and Governance

- Mapped workflow with clear and very detailed steps
- Known systems, infrastructure and data sources involved
- Risks, requirements and approval points
- Where humans need to be for interaction, breaking down silos, approvals
- Rough time and cost estimate for the current state (the pain they are experiencing)

Define Success Metrics and ROI

- Current state (time, money)
- Future state projections
- Clear measurement methodology

Select the Right AI Solution

- AI policy compliance
- Business risk assessment
- Data classification requirements
- Regulatory considerations
- Budget alignment
- Features and functionality match

Pilot Rules

A strong pilot is a controlled experiment with these elements:

Workflow Owner	One business stakeholder who owns the process
Baseline Metrics	Current time/cycle/error rates before AI
Success Definition	e.g., "reduce quote creation from 60 min to 20 min"
Guardrails	Permissions + human approval checkpoints
Training	30-60 minutes for users
Go/No-Go Checkpoint	Review at week 2

"If we hit the success metrics, we expand. If we don't, we stop. No guessing."

Define Success and the Pilot

Turn the conversation into an offer that feels safe and measurable:

- What does success look like in plain terms?
- What metric will prove it? (hours saved per week, response time, backlog reduction, error rate)
- What baseline do we have today for that metric?
- Who will own the process on your side?
- What guardrails are required? (permissions, approved sources, human approval, audit log)
- What is in scope and out of scope for the pilot?
- What would cause you to stop the pilot?

"Let's choose one workflow, set a baseline, implement AI with clear guardrails, and measure results over 2 to 4 weeks. If it meets the success metric, we expand. If not, we stop."

Handling Objections

Objection	Response
"AI is risky / we don't want data leaking"	That's exactly why we implement it with guardrails: permissions, data boundaries, logging, and approval steps. We can also limit AI to internal content only and keep sensitive data out of scope in phase one.
"We tried AI and it wasn't accurate"	Totally normal. AI without context, grounding, and process design is unreliable. We focus on workflow design, approved knowledge sources, and human review where needed—so accuracy improves and risk stays controlled.
"We don't have time"	That's why this works—we remove time-consuming tasks. The pilot needs 60-90 minutes to pick the workflow and 30 minutes for training. Everything else we handle.
"What's the ROI?"	We'll baseline it. If we save 10 hours/week in one role, that's roughly 40 hours/month. Multiply by loaded cost and compare to the monthly fee. We'll show ROI in the first month or we don't expand.
"Is this just another tool?"	Tools come and go. We're building a repeatable capability: workflow + controls + measurement.
Security concerns	We treat AI like any other system: least privilege, data boundaries, auditing, and human approval for high-risk actions.
Replace-staff fear	This isn't about replacing people. It's about removing the low-value work so your team can do the work customers actually pay for.

Meeting Summary Framework

At the end of the meeting, summarize using this structure to convert answers into a clear recommendation:

1	Business problem in their words
2	Current impact in numbers
3	Recommended first workflow
4	Why this is the best starting point
5	Required data and systems
6	Risk controls and approvals
7	Success metrics and timeline
8	Next step and owner on both sides

Appendix: Deep Discovery Question Bank

These comprehensive questions help you dig deeper when needed. Use them to clarify the business problem, understand processes, assess data readiness, and build trust around risk and control.

Clarify the Business Problem

10. What is the business problem you want to solve?
11. What happens if this stays the same for the next 3 to 6 months?
12. Who feels the pain the most: customers, staff, or both?
13. Where do delays, rework, or errors show up most often?
14. What work feels repetitive or manual and should not require a human to do it?
15. Which tasks require people to search for information, summarize, or write the same thing repeatedly?
16. What are the top three bottlenecks that slow down revenue, delivery, or support?
17. What is already being measured today that reflects this problem? (response time, cycle time, error rate, backlog, customer satisfaction)

Follow-Up Questions to Quantify

18. How often does this happen each day or week?
19. How long does it take each time?
20. How many people are involved?
21. What is the approximate cost of this time? If you do not know, what is the fully loaded hourly cost range?
22. What does a mistake cost you? (money, time, customer trust, compliance risk)

Identify the Process Behind the Problem

AI works best when there is a repeatable process. These questions expose the workflow:

23. Walk me through the process step by step from start to finish.
24. What triggers the work to start?
25. What inputs are used? (emails, forms, tickets, documents, spreadsheets, chat messages, calls)
26. What outputs are produced? (quotes, proposals, invoices, reports, ticket updates, client emails)
27. Where does the process slow down?
28. Where do handoffs happen between people or teams?
29. Where do approvals happen and who approves?
30. Where do people copy and paste, retype, or recheck information?
31. Which parts require judgement and which parts are routine?
32. What is the most common reason the process fails or needs rework?

Understand the Information and Systems

AI needs clear sources of truth and permissions:

33. Where is your source of truth for customer information?
34. Where is your source of truth for policies and procedures?
35. Where does operational work live? (ticketing system, CRM, accounting, project tool, shared drive)
36. Which systems must be included for this to work?
37. What information is scattered across email, chats, and people's heads?
38. Do you have written SOPs or checklists for this process?
39. How do new staff learn this process today?

Data Readiness Questions

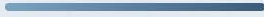
40. Is the information mostly structured, like spreadsheets and forms, or unstructured, like emails and documents?

41. Is the information clean enough to reuse, or is it inconsistent?
42. Are files labeled and organized in a way people can find quickly?

Risk, Privacy, and Control

These questions build trust and define guardrails:

43. What information is sensitive or restricted? (personal data, financials, health data, legal documents, client contracts)
44. What would be unacceptable if it happened? (data exposure, wrong advice to a customer, incorrect invoice, compliance breach)
45. Are there regulatory or contractual requirements that affect data handling?
46. Who can access what information today, and is it enforced?
47. What actions must always require human approval? (sending customer communications, changing financial records, approving refunds, modifying contracts)
48. Do you need audit logs for who accessed what and what was produced?



AI Sales Blueprint

A Framework for MSP Success

Remember: The best way to sell AI is to use it yourself.

