The AI adoption game board SALES EDITION

SCALE

Use cases on this game board are organized by level of complexity. We recommend starting with level 1 before graduating to more complex use cases.

PERSONALIZED SALES MESSAGING

Use ChatGPT or Regie.ai to generate email copy, sequences, LinkedIn messages, and call scripts tailored to specific personas, verticals, or buyer stages.

AUTOMATED MEETING PREP & FOLLOW-UP

Connect LLMs to email to summarize past interactions, generate key insights, and draft follow-up emails.

INDUSTRY-LEVEL RESEARCH

Use Deep Research to help reps understand and synthesize industry trends, market drivers, and competitive positioining to elevate prospect conversations.

ACCOUNT-LEVEL RESEARCH

Use Deep Research to generate tailored account overviews and map key stakeholders.

LEVEL 2

Once your team has mastered LLMs, graduate to incorporating more specialized tools.

COMPLEXITY
LOWEST

LLM-DRIVEN

These use cases involve minimal cost, risk, and IT involvement.

Start with a general purpose LLM to enhance productivity.

LEVEL 1

START

COMPLEXITY
MEDIUM

BEYOND LLMS ALONE

These use cases typically involve workflow tools or paid software. Teams may need training and alignment to fully unlock value.

ICP & SEGMENTATION OPTIMIZATION

Use Enlyft or MadKudu to analyze ICP data and signals, prioritize fit, and identify lookalike accounts.

BUSINESS CASE GENERATION

Use Symbe or Storydoc to standardize value selling by turning ROI/TCO models into buyer-ready decks with prospect data and relevant case studies.

COMPETITIVE INTELLIGENCE

Use Klue or Crayon to analyze win/loss data, track competitor mentions in conversations and news, auto-update battlecards, and push real-time counter-messaging to reps.

TERRITORY PLANNING & ASSIGNMENT

Use Gradient Works or Relevvo to assign and prioritize the highest-potential accounts by fit and rep capacity.

DYNAMIC PRICING & APPROVALS

Use DealHub or Nue.io to steer reps through configurations, pricing, and discounting, enforcing rules while recommending next-best actions.

ACCOUNT INTELLIGENCE PLATFORM

Use Actively or proprietary LLMs to create a custom account intelligence platform that ranks accounts and surfaces next best actions for reps to take.

COMPLEXITY
HIGHEST

FULLY INTEGRATED WORKFLOWS

These use cases require broader system integration and more sensitive data, often requiring substantial IT and data governance support.

REP PERFORMANCE MANAGEMENT

Connect LLMs to CRM and conversational intelligence platform to surface insights on rep/team performance across call transcripts, emails, and CRM activity.

FORECAST ANALYSIS

Connect LLMs to CRM and engagement platforms to surface insights across your pipeline and support deal acceleration.

Begin integrating systems and data streams to unlock strategic applications for AI.

LEVEL 3

DEAL REVIEWS & COACHING

Use LLMs and call recordings to analyze sales conversations and generate coaching insights, according to defined assessment criteria and methodology guardrails.

REAL-TIME CALL ASSIST

Use Docket or Aircover to develop a virtual SME trained on talking points, competitive battlecards, and technical content to support reps in real time.

ONBOARDING & ENABLEMENT

Use Grw.ai or SecondNature to simulate role plays with buyer push-back and help reps practice handling objections.