



# AI for Sales Mini Lab

Prospect smarter, prepare faster, and close with confidence using AI in every stage of the sales process.

LEVEL 2



50 participants



Virtual or F2F



3.5 hours



## Why do you need this?

Sales teams are under constant pressure to hit targets, but too much time is lost to admin, research, and prep that AI can now handle.

The best sellers are already using it to sharpen their outreach and free up time for the work that actually closes deals.

This hands-on program runs your team through the full sales process with AI, from prospecting and proposals to pipeline analysis and follow-up. Everyone leaves with a playbook and a plan to sell smarter starting this week.

## Business outcomes

- Reduce time spent on research, outreach drafting, and admin tasks.
- Improve proposal quality and personalisation without slowing down.
- Surface sharper pipeline insights and forecast with greater accuracy.
- Free up selling time by automating low-value preparatory work.

## By the end of this program you will:

1. Know what gen AI can and can't do reliably in a sales context.
2. Apply AI to core sales workflows: prospecting, outreach, proposals, and pipeline analysis.
3. Build reusable prompts for your most time-consuming sales preparation tasks.
4. Leave with a prioritized implementation plan tailored to your team and selling motion.

94%

of participants reported increased productivity in using AI

## How it works

- A half-day program built around the workflows sales teams use every day.
- Runs virtual or face-to-face, based on your preferences.
- Led by two expert facilitators with practical tips, live demos, and real-time support.
- Every activity uses company-authorized tools on sales-relevant scenarios.
- You'll get a takeaway playbook so the learning doesn't stop when the session does.
- Customised to your organization's AI maturity, tools, and CRM environment.

## More Selling, Less Admin

Your sales team will know exactly where AI saves them time, and where their expertise and relationships still matter most.



"Really interesting and made AI feel a lot more manageable. I've come away with so many ideas about how to implement this in my role"

**Poppy Morris, Pan Macmillan**

## Program Breakdown



### Setting the Scene

Where AI is genuinely useful for sales, and where it isn't. A grounded look at what top-performing teams are doing differently. Quick pulse check on your starting point.

### Module 1: Prospecting & Research

Use AI to build richer prospect profiles, identify buying signals, and prepare for calls in minutes instead of hours.

### Module 2: Outreach & Proposals

Generate personalised outreach sequences, tailor proposals to specific prospects, and handle objections with AI-drafted responses you can refine and send.

### Module 3: Pipeline & Forecasting

Use AI to analyze your pipeline data, spot deal risks early, and build clearer forecasts from the information you already have.

### Module 4: Meeting Prep & Follow-up

Automate meeting briefs, generate agendas, and draft follow-up emails that land. Learn how to turn call notes into structured action plans instantly.

### Module 5: Personal Action Plan

Choose 2-3 concrete sales tasks and define exactly which AI tools you'll use, when, and how you'll judge success.

### Wrap-up

Recap the topics covered. Final time for Q&A. Share the final survey which unlocks the Playbook takeaway.

### Takeaways

*AI for Sales Playbook with workflows, prompt templates, and an implementation roadmap to take back to your team.*