



Building AI Agents for Sales

Build and deploy AI agents that automate prospecting, accelerate deal prep, and give your sales team more time to sell.

LEVEL 3



25 participants



Virtual or F2F



2x 3.5-hour sessions



Why do you need this?

Sales teams lose too much time to research, admin, and repetitive prep, work AI agents can now handle. Free your sellers to focus on relationships and closing deals.

This hands-on workshop teaches your team how to design, build, and deploy real AI agents for everyday sales tasks. You'll leave with a working prototype and a clear plan for what's next.

Business outcomes

- Offload repetitive sales admin to AI agents.
- Remove bottlenecks in prospecting, proposal generation, and CRM updates.
- Boost team productivity and deal velocity.
- Turn sales playbooks and CRM data into automated, intelligent workflows.

By the end of this program you will

1. Understand the capabilities and limitations of AI agents for sales.
2. Identify and prioritize high-value agent use cases across the sales cycle.
3. Design and build a working AI agent prototype using your authorized tools.
4. Leave with a clear plan for building and scaling AI agents in your sales team.

Delivered in your tech stack:



94%

of participants built and deployed an AI agent during this workshop, using company authorized tools.

How it Works

- Structured workflow that takes you from idea to deployment of an AI agent for your sales team.
- Two expert facilitators to guide you through with tips, tricks, and examples.
- Hands-on activities using your company authorized tools (Copilot, Claude, Lovable etc).
- Application task between sessions to embed practice into your work.
- Includes a takeaway prompt pack and simple frameworks to repeat the process.
- Adapted to your AI maturity and selling motion.

Application Task:

Between Part 1 and Part 2, test your prototype agent with your peers and team. Gather early stage feedback to help you improve.

“Very well balanced, with great delivery. Knowledgeable facilitators, read the room well.”

Erik Laes, Keepit



keepit®

Learner Journey



Part 1: Design & Build

1. Intro to AI Agents

Learn what AI agents are, where they deliver value, and how they differ from AI assistants. Introduce the sales brief we will work on.

2. Define Your Agent

Map your sales workflows to identify high-impact ideas. Then create a clear agent use case and map out its scope, role, and boundaries.

3. Give Your Agent a Brain

Ground your agent in relevant sales knowledge: playbooks, CRM data, product docs, and competitor intel using retrieval (RAG) patterns.

4. Give Your Agent Tools

Connect your agent to sales tools and CRM systems. Define triggers, actions, and simple workflows so the agent can take meaningful action.

Part 2: optimize & Deploy

5. Rebuild Your Agent

Take feedback from testing with your team and peers, and run through the agent build process again, refining and improving.

6. Test and Optimize Your Agent

Test your agent against realistic scenarios then finalise its prompts, rules, and guardrails to improve reliability and performance.

7. Live Demos and Feedback

Demo your working agents to the group. Reflect and share lessons learned. Get extra power user tips from the expert facilitators.

8. Roadmap

Identify your next priority agent opportunities and define a clear, practical plan for piloting and scaling agents in your sales team.