



# Recipe for Sales AI Success

9 steps to discover sales AI use-cases  
in your organization

Implementing artificial intelligence (AI) is a top business priority across all industries. In one survey by MemSQL, 61% of respondents say that machine learning (ML) and AI was their company's most significant data initiative for the upcoming year.<sup>1</sup>

**Other findings from that survey:**

- 88% of respondents say their company has plans to implement AI and ML technologies into their organization, of those 95% said they would be implemented to make tasks or jobs easier.
- 74% say that ML and AI has the potential to transform their job and industry.
- 65% of those who've implemented or plan to implement expect it to better inform business decisions.

In 2018, the biggest challenge that sales leaders face is the productivity and performance of their sales teams.<sup>2</sup> Both SDR and AE groups have processes and tools in place that prevent them from reaching an optimal level of productivity. The results are missed quotas, lost revenue and opportunities and poor ROI of the sales team as a whole.

Smart sales leaders are looking to AI to solve this. According to Forrester, 46% of companies are looking to implement AI tools into their sales and marketing teams,<sup>3</sup> but many are unsure of where to start.

Sales AI has many uses in today's complex sales process. There's over 500 sales solutions on the market today, many with intelligent capabilities and that number is only expected to grow.<sup>4</sup>

There's no way for every sales manager or operations team to research every tools that's out there, and even they had the time, they'd first and foremost need to fully understand the need across their sales organization.

Holding a Sales AI Use-case Discovery Workshop identifies those specific needs within an organization and is imperative to the success of sales teams.

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1) [MEMSQL Survey](#)

2) [The Bridge Group](#)

3) [Forrester Report](#)

4) [Sales Tech Landscape](#)

# The Use Case Discovery Workshop

A use-case discovery workshop helps business leaders create impactful change in their organization by bringing all stakeholders together to collaborate. This format identifies high-value, low-effort business use-cases and ensures these initiatives are being driven from the bottom-up rather than top-down.

## Value

There are several benefits that organizations gain from hosting a Use Case Discovery Workshop.

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### Real strategies are put in motion

- Use cases are easily taken from idea to reality as employees identify real use cases that apply directly to the business.
- Use cases are prioritized based on a high-value and low-effort scale, meaning each objective has a high ROI with a low cost to the organization.
- All requirements and barriers of each initiative are established upfront making them easy to implement and navigate as needed.

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### Bottom-up approach to business problems

- As one member from each team/department is engaged in the group, each opinion is accounted for and carries the same value across the board.
- Psychological phenomenons that prevent lower-level employees from speaking up are eliminated and they are free to openly share opinions.
- Upon implementation, stakeholders have already seen value in an initiative and there's no need to fight for buy-off.

The bottom-up approach makes this particular workshop format so valuable in strategic organizations. All members bring their own challenges and insights to the table, and hold high-value, cross-department conversations all at once.

What often occurs in large group situations is that people in lower-level positions tend to not speak up and let management own the conversation. This workshop encourages the opposite; small group discussions encourage individual participation and input across the board.

Both the Bystander effect and conformity psychological phenomena disappear and instead organizations gain the “wisdom of the crowd.”

## Specific to sales

This particularly is important for sales teams beginning their sales AI implementation journey.

By 2020, only 30% of B2B businesses will have AI augmenting at least one of their primary sales processes.<sup>5</sup> The Kondratiev Waves of innovation explain how those who implement AI will see dramatic gains over their competition. It also highlights how the AI wave is accelerating quickly and that the critical window of implementation is shorter than other technological waves.

Automation Hero estimates this wave will leave those who fail to implement within the next 6 years struggling to catch up.

The correlation between AI and performance is apparent as top performing sales teams are 3.4x as likely to already be using AI within their process.<sup>6</sup>

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This workshop helps you find the most beneficial use cases for your team. Each of the 500+ intelligent sales tools has a specific problem it can solve; the Use Case Discovery Workshop cuts through the noise of the sales tech space and paves the way for you to implement only the most beneficial sales AI tools with the least amount of blockers.

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5) [Gartner](#)

6) [Salesforce: State of Sales](#)

# Getting Started

Before hosting a workshop, there are several steps that sales leaders must take to prepare.

## Materials needed:

Sticky notes, pens, presentation slides, mobile access to internet

### 1 Set goals.

The purpose of hosting this workshop is to find highly specific use cases within your sales organization that can help you improve your overall business goals. Do you have problems hitting revenue goals? Are you seeing poor data collection? What about lead handoffs or conversion rates? These are topics you should consider when setting objectives for this workshop.

### 2 Coordinate participants.

Organizers need to include all stakeholding teams that influence the sales process. This of course will vary depending on the size of your sales team. You'll definitely need a handful of sales reps, members of your sales operations teams, sales managers, and even enablement, revenue and lead gen teams if it makes sense to do so.

Make sure there's an equal number of participants from all teams. You will be splitting everyone into groups of 3 to 5 people and will want just one representative from each team within a group.

Also consider how many groups you'd like to have during this workshop. If you would rather only have a few use cases only invite 3 to 4 members from every team, if you'd like more you can invite up to 10 from each team.

### 3 Prepare presentation and Google form.

Each workshop begins with a presentation that outlines the goals of the workshop and what participants will be asked to do during it.

We'll dive into what to include in this presentation in the next section. But be sure to let all workshop participants know that this will take approximately three to four hours to complete.

Also create a Google form that your participants will use during the workshop and as a way to have a shareable document.

# Holding the Workshop

## 1 Presentation (20 min.)

Gather all designated participants for the presentation. This needs to clearly lay out the goals and objectives to the members of your sales organization on why they're participating in this workshop.

**Use Case Workshop presentations have the following:**

- a. **Inspiration.** Inform them about the opportunity they're getting to use their voice to drive real business change for the company.

Many of our workshops began with discussing the cycle of innovation in business and how it's mission-critical for the organization to stay ahead of the innovative curve as to not fall behind competitors, thus why sales AI needs to be discussed within your organization now.

- b. **Goals and objectives.** Review the goals that you created during your first step of preparation. This should not only reflect the goals for the workshop, but also the goals you hope to accomplish following the workshop.

Example:

- Goal 1) Collaborate with all members of the sales team to find use cases for sales AI within current process.
- Goal 2) Identify use cases that will increase team productivity.
- Goal 3) Prioritize use cases based on high value low effort implementation.
- Goal 4) Implement these use cases within 60 days of this workshop.

- c. **Agenda.** Inform participants on what activities they will be asked to perform today. This is listed out in the remaining steps.

## 2 Split up (10 min.)

Split everyone into groups of 3 to 5 people. Ensure there is one member in each sales role in each group. Give each group a stack of unused sticky notes and writing utensils.

## 3 Ask questions (20 min.)

To achieve true brainstorming without barriers; use the question: "If the world was magic" to ask participants what changes or improvements they'd like to see that can be brought about through sales technology and tools.

**Instruct each group to:**

- a. **Dream big.** There are no bad ideas and nothing is too complex or complicated. Assume there's no financial or technological restraints. Ask them to generate as many ideas as possible.
- b. **Write it out.** Each idea need to be written at the top half of a sticky note (one idea per note). Instruct them to leave room on the bottom half of the note for more content to be added later.

**4 Effort score (20 - 30 min.)**

For each idea, have every person in the group score the difficulty of implementation based on their role (0 being easy, 10 being difficult.) Each person should write their effort score toward the top of the note and next to the previous person's score (basically all effort scores should be in a single line)

For example, sales operations would say that integrating a sales AI tool with their CRM would be hard, but the sales rep may find that easy.

Then, have each group calculate the average of all effort scores given by the group members. Example: Ops = 3, manager= 7, rep = 1. The average effort score would be = 3.6

**5 Value Score (20 - 30 min.)**

Do the same thing but this time create a value score. Ask everyone in the group to score how much this would benefit their role within the organization. Again calculate the average of everyone's value score.

**6 Prioritize ideas (15 min.)**

Ask each group to sort the sticky notes based on which have the highest value score and the lowest effort score. Reserve the top two or three per group and set the rest of the sticky notes aside for now.

**7 Requirements (20 min.)**

Have each group take their top two or three "ideas" and have each member breakdown the requirements for that idea to be implemented based on their role.

Will you need a CRM to implement this project? Do you need sales data? Do you need to hire more people? Have each member write out anything that would be needed to make that idea a reality. (We can offer a templated response checklist for this stage if needed)

**8****Barriers (20 min.)**

Do the same thing but now consider what barriers would hold your organization back from implementation. Have each member break down the barriers that may slow down the implementation process based on their role.

Would your organization need to find budget? Do they lack time for proper implementation? Missing clean data? Missing a tool?

**9****Input the data (20 - 30 min.)**

Have each groups input all of the ideas (including the ones that were set aside), effort and value scores, requirements and barriers into a Google form.

Afterwards, you will have a balanced and holistic view of the use cases across your organization that can improve the efficiency and productivity of your sales team.

## We're here to help

Sales AI is a top growth area for sales teams with adoption predicted to grow 139% in the next three years,<sup>7</sup> which is why hosting a Sales AI Use Case Discovery Workshop is essential for the success of your organization. It's time to start implementing, and this allows you to do so in a smart and highly effective way.

We'd love to share our Google Sheet Forms, and example presentation slides should you need further help hosting your own Use Case Discovery Workshop.

Please email [hi@automationhero.ai](mailto:hi@automationhero.ai) with the subject line Sales Use Case Discovery Workshop with any questions you may have in addition to a request for our examples and we'll be happy to help!

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7) [Salesforce](#)