

Tool: Design a Compelling AI Vision That Improves Sales Outcomes

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Chief sales officers often focus on AI efficiency gains without considering the positive impact on the sales process and the buyer's journey. This tool helps to align AI use cases and technology investments to buyer journey stages and improve buy-in from stakeholders to achieve better sales results.

When to Use

AI investments for the sales team are often planned around the ways they create efficiencies for sellers, such as reducing administrative tasks, without considering the role they play in reducing complexity for both buyers and sellers during a purchase journey. Chief sales officers (CSOs) must strategically plan AI investments in alignment with the buying journey to demonstrate how such investments will drive tangible business outcomes and enhance the overall customer experience. Designing AI initiatives around the buying journey allows for:

- **Increased conversion rates** — AI can identify and address buyer and seller pain points that improve the likelihood of a deal converting.
- **Data-driven decision making** — Leveraging AI to supplement a selling strategy with predictive and real-time analytics allows you to reveal actionable insight into customer preferences, improving seller and organization decision making.
- **Resource optimization** — Focusing AI plans around the most optimal scenarios for supporting or improving buying ensures a more effective resource allocation and higher sales performance.
- **Strategic alignment** — Ensures that all commercial functions work toward a common goal, fostering collaboration and understanding.

This starts with being able to define your AI ambition. Sales AI ambition is how the commercial organization intends to use AI to improve productivity and the customer experience. Ambition consists of multiple initiatives, supporting a larger AI strategy, that describe how AI should simplify specific areas in the buying journey by either being customer-facing or operational behind the scenes.

However, defining your AI ambition isn't enough. While the tool allows you to create a structured vision, additional work must be done to make it a complete story that can be shared throughout the organization. When designing your change story, consider the following elements:

- **Align Stakeholders** — Ensure all relevant functions, such as marketing, IT, data and analytics and finance, are aligned on sales' AI strategy and understand their roles and contributions by considering the relevant metrics and/or business outcomes that connect your strategy to their goals. This prevents other functions from impeding sales' ability to invest in solutions, creating conflicting initiatives and potentially hindering adoption due to incomplete implementation planning.
- **Define AI Projects** — Clearly outline and prioritize sales AI initiatives, ensuring each project is well-defined for stakeholders with specific hypotheses, expected outcomes and measurable metrics that tie in to desired organizational outcomes.
- **Secure Buy-In** — Build consensus with stakeholders on a route forward by presenting a well-structured and compelling case for sales AI investments, highlighting the strategic value and anticipated impact.

The tool is designed to assist CSOs in leading a collaborative workshop with key stakeholders, including sales, marketing, sales operations, sales enablement, IT and data and analytics teams. The end goal is to develop a comprehensive AI plan built around how AI can best impact buying needs and seller activities that can be communicated throughout the organization. Each slide represents an individual AI initiative, encompassing critical elements such as:

- The buying job(s) that the investment is intended to positively impact
- Hypotheses on how AI investments will lead to desirable outcomes
- The sales AI use cases that align
- Key seller actions AI use augments or automates

- The sales technology that delivers the AI experience
- Sales-focused strategic initiatives that connect ambition to its impact on organizational goals

The end result provides a structured foundation for communicating AI ambitions effectively.

Consider investments that are both everyday AI — focused on task automation and streamlining processes — and game-changing AI — centered around innovation and transformation. Doing so empowers the sales function to strategically allocate resources, ensuring that incremental improvements and disruptive innovations are pursued to maximize sales performance and competitive advantage.

Directions for Use

To effectively use this tool, CSOs should follow these steps:

- **Prepare workshop content** — Create a draft-level point of view that will be refined in the workshop on the following:
 - **Define sales AI use cases** — Identify and prioritize sales AI use cases based on value and feasibility.
 - **Audit sales technology stack** — Review existing technologies and identify potential new investments that support AI initiatives.
 - **Mine key seller actions** — Analyze seller workflows to pinpoint actions that could benefit from AI integration.
 - **Gather sales strategy initiatives** — Use frameworks like Gartner's AIBSV to align AI projects with strategic goals.
 - **Metrics** — Determine the right metrics for measuring sales AI project success.

- **Conduct workshop** — This should be a collaborative session with stakeholders across various functions. Plan for the following:
 - **Kickoff** — Begin with an overview of the workshop objectives, the roles and responsibilities of each stakeholder, and the important role AI will play in driving sales and buyer experience transformation.
 - **Collaborative discussions** — Facilitate discussions among stakeholders to refine hypotheses, validate use cases and identify key seller actions. Build consensus on stakeholder actions and support needs.
 - **Technology assessment** — Evaluate current and potential AI-driven tools, ensuring their usage aligns with identified use cases and fit within seller workflows.
 - **Strategic alignment** — Ensure that each sales AI project aligns with sales' overall strategic objectives and demonstrates a clear value as it relates to the seller and buyer experience.
- **Document AI vision** — This is not intended to be one slide. On the contrary, the idea is to walk away with a multislides deck of various desired initiatives/projects that can be built into a communication plan to gain buy-in and consensus from stakeholders. Each use case should have its own slide.

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