



Introduction to AI for Sales and Marketing

Practical Applications for Modern Teams

2-Day Course | AI Elevate



Customer Engagement



Campaign Analytics



Content Generation



Lead Scoring

Course Overview

Day 1

AI Foundations & Content Creation

Day 2

Analytics, Scoring & Implementation

What You'll Walk Away With

Practical skills to immediately apply AI tools in your daily sales and marketing workflows, plus a personalized implementation plan.

Day 1



The AI Revolution in Sales & Marketing

Understanding the Landscape

Why AI in Sales & Marketing Now?

80%

of
marketing
leaders
plan to
use AI by
2025

40%

productivity
increase
with AI
tools

3x

faster
content
creation

25%

higher
conversion
rates

The Perfect Storm

- **Technology maturity:** LLMs and generative AI are now production-ready
- **Tool accessibility:** No-code/low-code AI tools for non-technical users
- **Competitive pressure:** Early adopters are pulling ahead
- **Customer expectations:** Personalization at scale is now expected

Day 1

AI Capabilities for Sales & Marketing



AI Across the Customer Journey



Top of Funnel

- SEO content generation
- Social media posts
- Ad copy optimization



Middle of Funnel

- Lead scoring
- Email personalization
- Chatbot engagement



Bottom of Funnel

- Sales enablement
- Proposal generation
- Pricing optimization
- Churn prediction

Day 1

AI Tools Landscape

Tool Selection Criteria

- **Integration:** Does it connect with your existing stack?

- **Learning curve:** How quickly can your team adopt it?
- **ROI:** What's the time/cost savings vs. investment?
- **Data privacy:** Where does your data go?



AI-Powered Content Generation

Creating Marketing Content at Scale

Content Types AI Can Create



Written Content

- Blog posts
- Email campaigns
- Social posts
- Ad copy
- Product descriptions
- Case studies



Visual Content

- Social graphics
- Ad creatives
- Infographics
- Product mockups
- Brand visuals
- Presentations



Video & Audio

- Video scripts
- Podcast outlines
- AI voiceovers
- Video captions
- Short-form clips



Strategic Content

- Content calendars
- Campaign briefs
- Competitor analysis
- Personas
- SEO strategies
- Market research

Prompt Engineering for Marketing

The quality of AI output depends entirely on the quality of your prompts.

Weak Prompt

"Write a marketing email."

Result: Generic, unusable content that requires complete rewriting.

Strong Prompt

Role: You are a B2B email marketing specialist.

Context: Our SaaS product helps [industry] companies reduce [pain point] by 40%.

Task: Write a follow-up email to prospects who attended our webinar but haven't booked a demo.

Format: Subject line + 150-word email. Include one customer proof point and one clear CTA.

Tone: Helpful, not pushy.
Professional but conversational.

Day 1

Marketing Prompt Templates



Email Campaign

Write a [type] email for [audience].

Goal: [action]

Key benefit:
[value prop]

Include:
Subject line,
preview text,
body (under 200



Social Media

Create 5 [platform] posts about [topic].

Audience:
[persona]

Brand voice:
[tone]



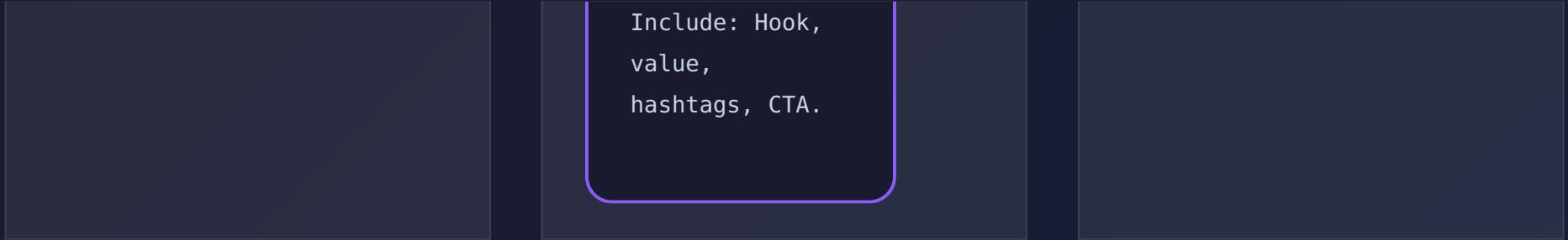
Blog Post

Write a blog post:
" [title] "

Target keyword:
[SEO keyword]

Reader level:
[beginner/
expert]

Include: H2 sections,
examples,
actionable



Include: Hook,
value,
hashtags, CTA.

Pro Tip: Create a Prompt Library

Save your best-performing prompts in a shared document. Include the prompt, sample output, and what worked well. This becomes your team's AI playbook.

Day 1

AI-Assisted Content Workflow



The Human-AI Balance

AI Does Best:

- First drafts & variations
- Research & data synthesis
- Reformatting & repurposing
- Grammar & optimization

Humans Do Best:

- Brand voice & authenticity
- Strategic decisions
- Emotional connection
- Quality control



AI for Customer Engagement

Personalization at Scale

Day 1

The Personalization Imperative

71%

expect
personalized
experiences

76%

frustrated
by generic
content

80%

more likely
to buy
with
personalization

\$20

return per
\$1 spent
on
personalization

Traditional Personalization

- "Hi {First_Name}"
- Basic segmentation (industry, size)
- Static recommendation rules
- Manual A/B testing

⚠ Limited, labor-intensive, slow

AI-Powered Personalization

- Dynamic content generation
- Behavioral micro-segmentation
- Real-time recommendations
- Continuous optimization

▢ Scalable, intelligent, adaptive

Conversational AI for Sales

Modern AI Chatbots Can:

Sample Bot Conversation

Bot: Hi! I see you're looking at our enterprise plan. What's driving your search for a new solution?

Visitor: Our current tool doesn't integrate with Salesforce

Bot: Great news - we have native Salesforce integration! Would you like me to show you how it works, or schedule a quick demo with our team?

Real Results

- 35% more qualified leads captured
- 50% reduction in response time

- 24/7 coverage without staffing costs

Day 1

Hands-On Exercise: Content Creation

Exercise 1: Create Marketing Content with AI

Using ChatGPT or Claude, create content for a real marketing campaign.

1□

Email Sequence

Create a 3-email nurture sequence for

2□

Social Campaign

Create a week of social posts promoting a new feature launch.

- 3 LinkedIn posts

3□

Ad Copy Variants

Generate 5 Google Ads variants for your top product/service.

- Headline variations

leads who downloaded
your whitepaper.

- Email 1: Thank you
+ value
- Email 2: Case study
- Email 3: Demo
invitation

- 5 Twitter/X posts
- 2 Instagram captions

- Description variations
- Different value props

Remember the CRAFT Framework

Context → Role → Action → Format → Tone

Day 2



Lead Scoring & Predictive Analytics

Data-Driven Sales Intelligence

What is AI Lead Scoring?

AI lead scoring uses machine learning to predict which leads are most likely to convert, based on historical data patterns.

Traditional Scoring

- Manual point assignment
- Downloaded whitepaper = +10 pts
- Visited pricing page = +20 pts
- Enterprise company = +30 pts

⚠ Based on assumptions, not data

AI Scoring

- Learns from closed-won patterns

Lead Score Distribution

Hot Leads (80-100)  12%

Warm Leads (50-79)  28%

Cold Leads (0-49)  60%

Key Insight: AI scoring typically improves lead-to-opportunity

- Considers 100+ signals
- Updates in real-time
- Explains why scores change

□ Data-driven, adaptive, accurate

conversion by 30-50% by focusing rep time on high-potential leads.

Signals AI Uses for Lead Scoring



Demographic

- Job title & seniority
- Department
- Company size
- Industry
- Location



Firmographic

- Revenue
- Growth rate
- Tech stack
- Funding stage
- Hiring signals



Behavioral

- Page visits
- Content downloads
- Email engagement
- Form submissions
- Chat interactions



Temporal

- Recency of activity
- Frequency patterns
- Time to conversion
- Engagement velocity
- Buying cycle stage

The Power of Pattern Recognition

AI can identify patterns humans miss. Example: "Leads who visit the integrations page, then pricing, within 3 days of signing up for a webinar convert 4x more often."

AI-Optimized Sales Funnel

AI Optimizations at Each Stage

□ → □ Traffic to Lead

AI chatbots, personalized CTAs, smart forms

□ → □ Lead to MQL

Predictive scoring, automated nurturing



$\square \rightarrow \square$ MQL to SQL

Intent signals, sales intelligence, timing



$\square \rightarrow \square$ SQL to Customer

Proposal generation, pricing optimization, churn prediction



Campaign Analytics & Optimization

Data-Driven Marketing Decisions

Day 2

AI-Powered Analytics

Campaign Performance



Conversion Rate

4.2%

↑ 18% vs last month

Cost per Lead

\$42

↓ 12% vs last month

Pipeline Generated

\$1.2M

↑ 25% vs last month

What AI Analytics Can Do

- Identify top-performing content and channels
- Predict campaign outcomes before launch
- Recommend budget reallocation
- Detect anomalies and alert you
- Generate natural language insights

Ask AI Questions Like:

- "Why did email performance drop last week?"
- "Which audience segment converts best?"
- "What should I test next?"
- "How should I allocate next month's budget?"
- "What's driving the spike in traffic?"

AI-Powered A/B Testing

Traditional A/B Testing

- Test one variable at a time
- Wait for statistical significance
- Manual hypothesis creation
- Limited by human creativity
- Slow iteration cycles

AI-Enhanced Testing

- Multivariate testing at scale
- Dynamic traffic allocation
- AI generates test variations

Example: Email Subject Line Testing

Prompt to AI:

Generate 10 email subject line variations for a webinar invitation. Our audience is B2B marketers.

Current best performer: "Join us: Marketing Automation Workshop"

- Learns from every test
- Continuous optimization

Test these angles: urgency, curiosity, benefit-focused, question, personalization.

AI-Generated Variations:

1. "Your marketing automation is costing you leads"
2. "[Name], save your seat for Thursday"
3. "What top marketers know about automation"
4. "Last chance: Only 12 spots left"
5. "The automation mistake 73% of marketers make"

Predictive Analytics for Marketing



Predict

- Which leads will convert
- When customers will churn
- Campaign performance
- Revenue forecasts
- Seasonal trends



Optimize

- Best send times
- Optimal pricing
- Channel allocation
- Content recommendations
- Budget distribution



Automate

- Trigger-based actions
- Dynamic personalization
- Real-time bidding
- Inventory management
- Customer routing

Case Study: Predictive Churn Prevention

Challenge: 8% monthly churn rate

Solution: AI model predicts at-risk customers 30 days before churn

Action: Automated retention campaigns triggered for high-risk accounts

Result: 35% reduction in churn, \$2.4M saved annually



Implementation Strategy

From Learning to Doing

Getting Started: The Crawl-Walk-Run Approach

□ Crawl

Week 1-2

- Pick ONE use case
- Use free AI tools (ChatGPT)
- Document time savings
- Share wins with team

Example: Use AI to draft all social

□ Walk

Month 1-2

- Expand to 3-5 use cases
- Create prompt templates
- Train team members
- Evaluate paid tools

Example: Implement AI email personalization

□ Run

Month 3+

- Integrate with CRM/MAP
- Implement lead scoring
- Build AI workflows
- Measure ROI

Example: Full AI-powered marketing

Quick Wins to Start Today



Email Marketing

- Generate subject line variations
- Write personalized email intros
- Create email sequences
- Summarize long emails



Content Marketing

- Outline blog posts
- Generate meta descriptions
- Create product descriptions
- Write case study drafts



Social Media

- Draft posts for multiple platforms
- Generate hashtag suggestions



Sales Support

- Research prospects
- Draft personalized outreach

- Create content calendars
- Repurpose content across formats

- Create proposal sections
- Summarize meeting notes

Common Pitfalls to Avoid

□ Don't: Publish AI Content Without Review

AI can hallucinate facts, use wrong brand voice, or include outdated information.

□ Do: Always have a human review and edit AI output.

□ Don't: Put Sensitive Data in AI Tools

Customer PII, financial data, and trade secrets shouldn't go into public AI tools.

□ Don't: Try to Automate Everything at Once

AI transformation is a journey, not a destination.

□ Do: Start small, measure results, then expand.

□ Don't: Ignore Your Brand Voice

Generic AI output sounds like... generic AI output.

□ Do: Use enterprise-grade tools with data protection or anonymize data.

□ Do: Include brand guidelines and examples in prompts.

□ Don't: Expect Perfection on First Try

AI is a draft generator, not a finished product machine.

□ Do: Iterate on prompts and refine outputs.

□ Don't: Skip the Measurement

Without metrics, you can't prove (or improve) AI ROI.

□ Do: Track time saved, quality improvements, and business outcomes.

Hands-On Exercise: Build Your AI Toolkit

Exercise 2: Create Your Personal AI Implementation Plan

Design a 30-day plan to integrate AI into your sales/marketing workflow.

Step 1: Identify 3 Use Cases

Based on what you learned, which 3 applications would have the biggest impact for you?

1. _____
2. _____

Step 3: Create Your Prompt Library

Write 3 reusable prompt templates for your top use cases.

Template 1: _____

Template 2: _____

3. _____

Template 3: _____

Step 2: Choose Your Tools

Which tools will you use for each use case?

- Free: ChatGPT, Claude, Canva AI
- Paid: Jasper, HubSpot AI, etc.

Step 4: Set Success Metrics

How will you measure impact?

- Time saved: _____ hrs/week
- Quality metric: _____
- Business outcome: _____

Ethical AI in Marketing



Privacy

- Don't feed PII to public AI
- Respect data consent
- Use enterprise tools for sensitive data
- Anonymize when possible



Transparency

- Disclose AI use when appropriate
- Don't fake human interaction
- Be honest about AI limitations
- Label AI-generated images



Fairness

- Watch for bias in targeting
- Ensure inclusive content
- Test across demographics
- Don't manipulate or deceive

The Trust Factor

83% of consumers say they want to know when they're interacting with AI. Transparency builds trust; deception destroys it. Use AI to enhance human connection, not replace it.

Resources for Continued Learning



Free Resources

- [Learn Prompting](#)
- [OpenAI Documentation](#)
- [Anthropic Prompt Library](#)
- HubSpot AI Academy
- Google AI Marketing Guide



Recommended Tools

- **General:** ChatGPT, Claude
- **Marketing:** Jasper, Copy.ai
- **Visual:** Midjourney, DALL-E
- **CRM:** HubSpot AI, Salesforce Einstein
- **Analytics:** Google Analytics 4



Next Steps

- Join AI marketing communities
- Follow AI thought leaders
- Experiment weekly
- Share learnings with team
- Measure and iterate

AI Elevate Courses

Continue your AI journey with our advanced courses: **Prompt Engineering Deep Dive**,
AI Agents for Business, and **Enterprise AI Strategy**.

Key Takeaways

1□

AI is a Force Multiplier

It amplifies your capabilities, not replaces your expertise. The best results come from human + AI collaboration.

4□

Data is Your Competitive Advantage

AI is only as good as the data it learns from. Your unique customer data creates unique insights.

2□

Prompts Are Your Superpower

The quality of AI output depends on the quality of your input. Invest time in learning prompt engineering.

5□

3□

Start Small, Scale Fast

Pick one use case, prove value, then expand.

Don't try to boil the ocean.

Ethics and Trust Matter

Use AI responsibly. Transparency and authenticity build long-term customer relationships.

6□

The Time to Start is Now

AI adoption is accelerating. Early movers are gaining advantages that will compound over time.



Thank You!

Now Go Transform Your Marketing with AI



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