



# Pulse Check: AI in the Sales Process

## *Key Research Takeaways*

# AI Is Everywhere



STAMFORD, Conn., September 21, 2023

**Gartner Expects 60% of Seller Work to Be Executed by Generative AI Technologies Within Five Years**

# Many Ways to Use AI In Sales

- **Large Language Models (LLMs):** In late 2022, ChatGPT released the largest LLM, demonstrating the power and capability of these tools.
- **Integrations:** Many AI integrations can help improve seller productivity and efficiency.
- **Einstein in SFDC and/or ChatGPT integration with CRM:** Automate entry of prospect names and titles, tie to opportunities, qualify leads, schedule reminders, etc.
- **Copilot & Viva Sales:** Draft email replies, integrate with SFDC knowledge, store an update insight back into CRM, call notetaking, conversation intelligence, etc.

**Where do you start?**



**ChatGPT**



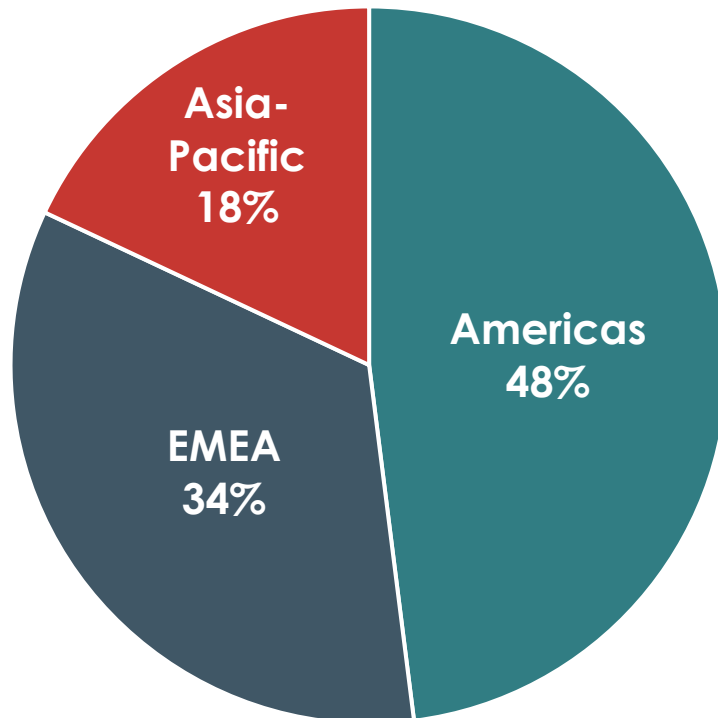
**Bing**



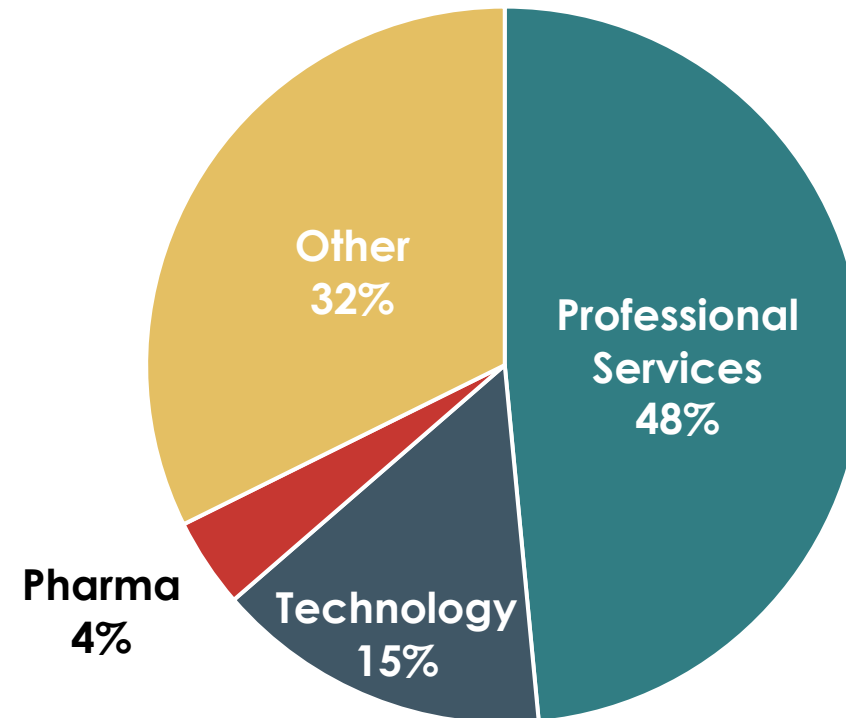
# Research Background

We analyzed 251 survey responses from sales leaders, sellers, sales managers, sales enablement, and sales training professionals to get a snapshot of their use of AI in the sales process. Respondents represented a range of regions and industries.

**Regions**



**Industries**





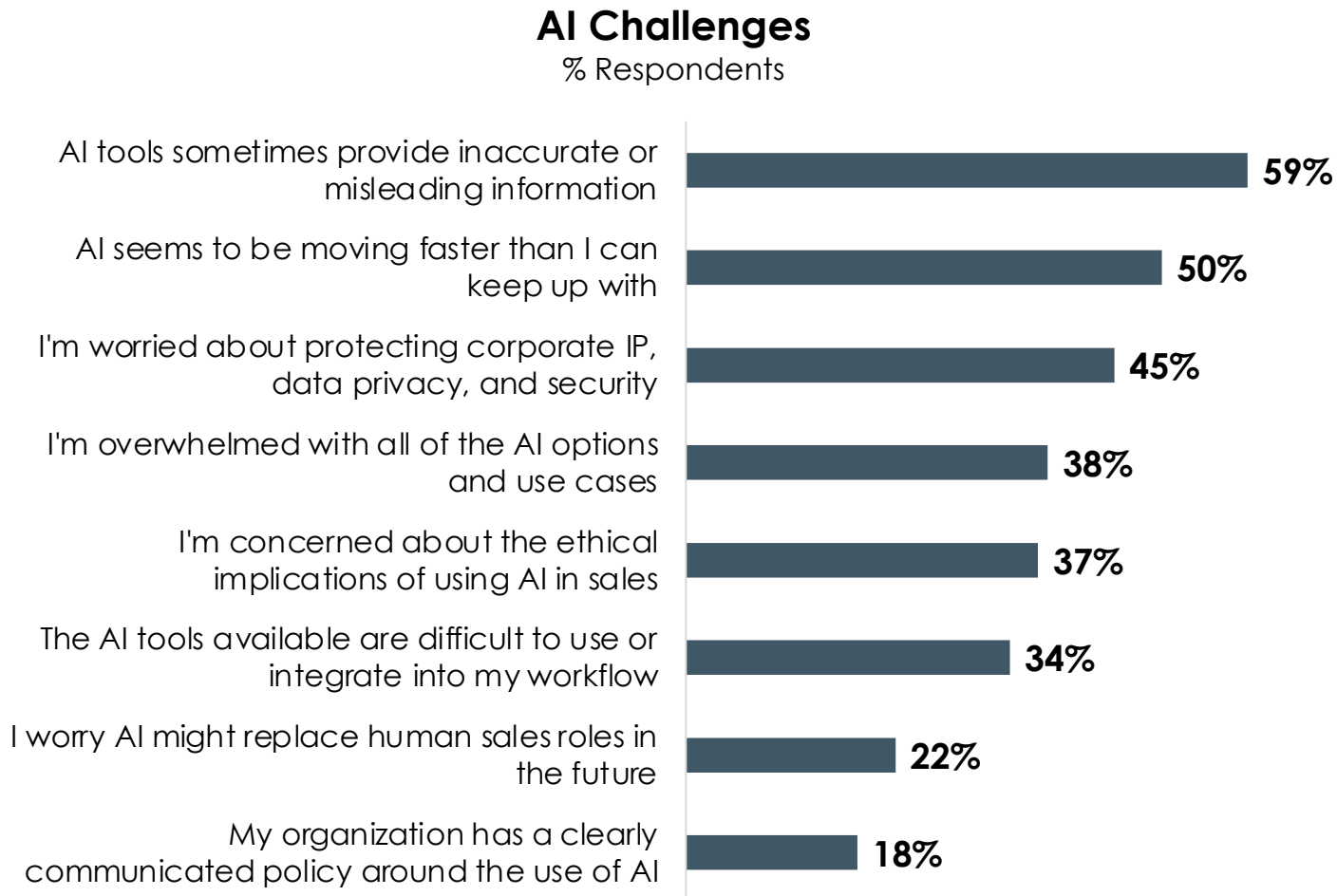
# Research Objectives

We wanted to learn how AI is being used in the sales process and explore its impact on sales organizations:

- How is AI used to move prospective buyers from the early stages of the buying process to purchase?
- What challenges are sales organizations facing with AI?
- Are sales teams getting value from their use of AI?



# Sellers Are Struggling to Keep Up



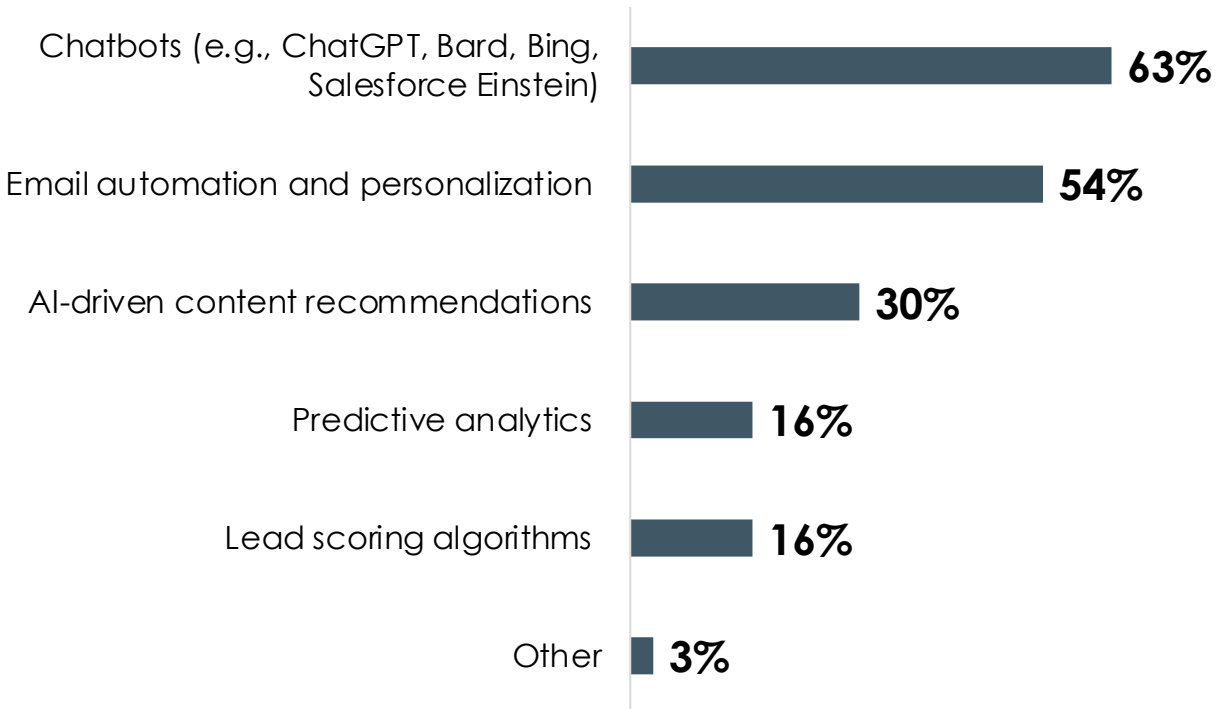
Even respondents seeing the **greatest impact** from AI on sales performance are **overwhelmed by the AI options and use cases** (45% vs 35% for others).

Source: Use of AI in the Sales Process, RAIN Group Center for Sales Research.

# AI Tools in the Sales Process

**Which of the following AI tools or technologies do you/your sales team currently use in the sales process?**

% Respondents



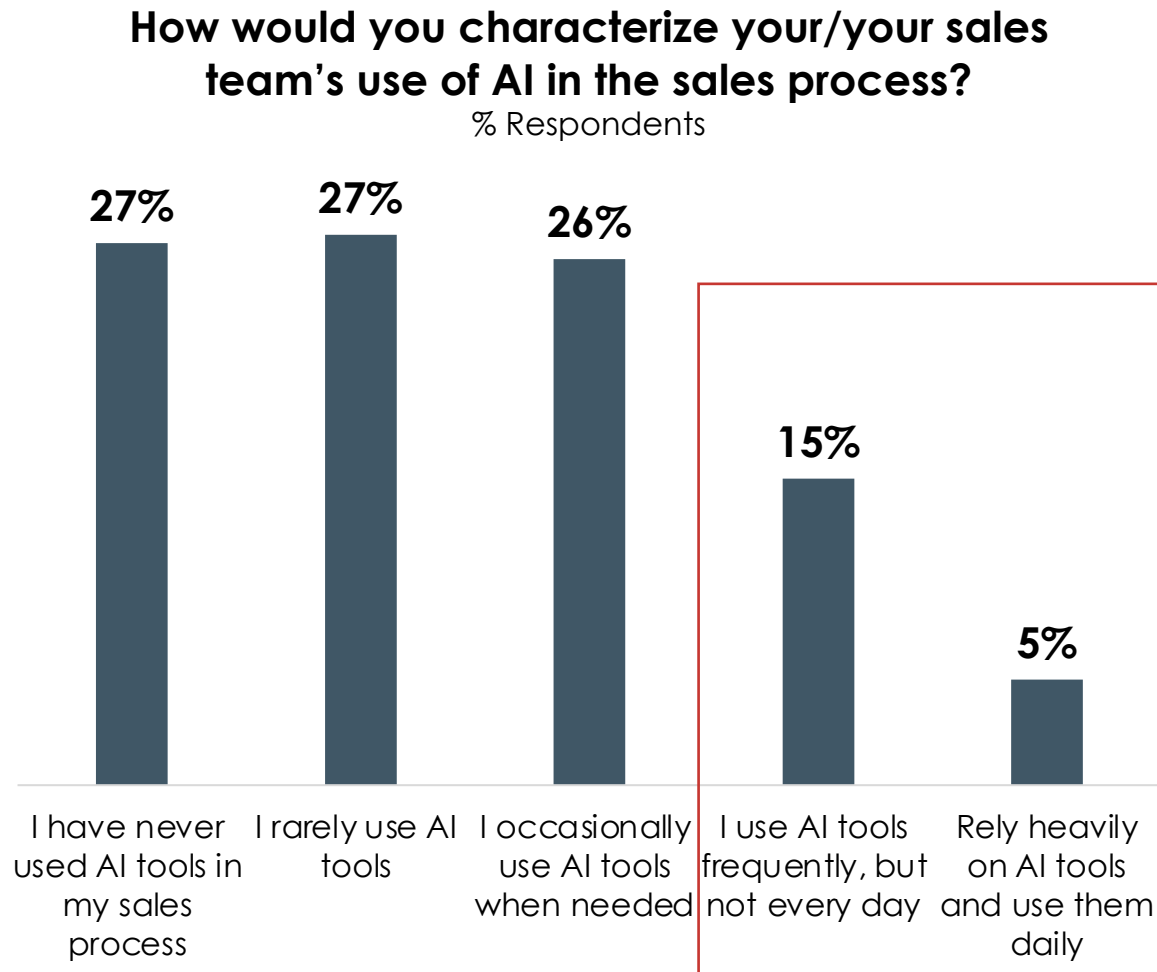
Those reporting the **greatest impact of AI on sales performance** are

**1.3x**

**more likely** to use chatbots.

Source: Use of AI in the Sales Process, RAIN Group Center for Sales Research.

# Frequency of AI Use in the Sales Process



# 20%

of respondents use AI tools **frequently** or **daily** in the sales process.

And they're more likely to see the greatest impact. ➡

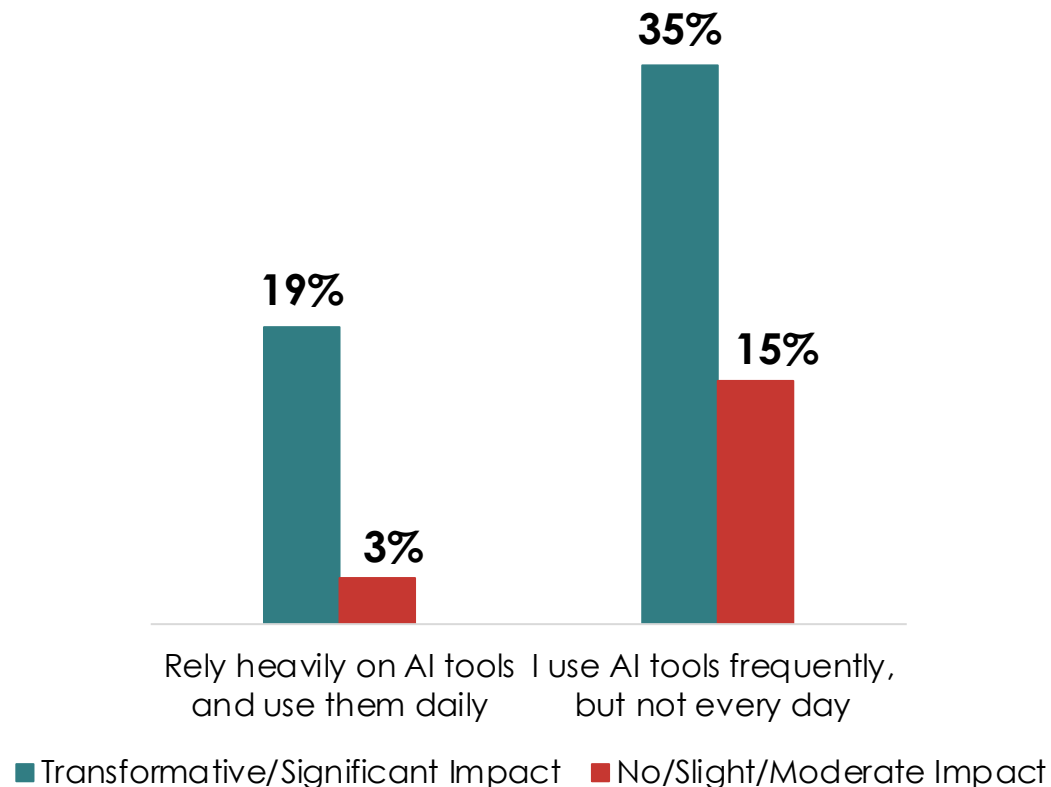
Source: Use of AI in the Sales Process, RAIN Group Center for Sales Research.



# Correlation of Frequency of AI Use and Impact

How would you characterize your/your sales team's use of AI in the sales process?

% Respondents



Those reporting the **greatest impact** from AI on their sales performance and productivity are

**3x**

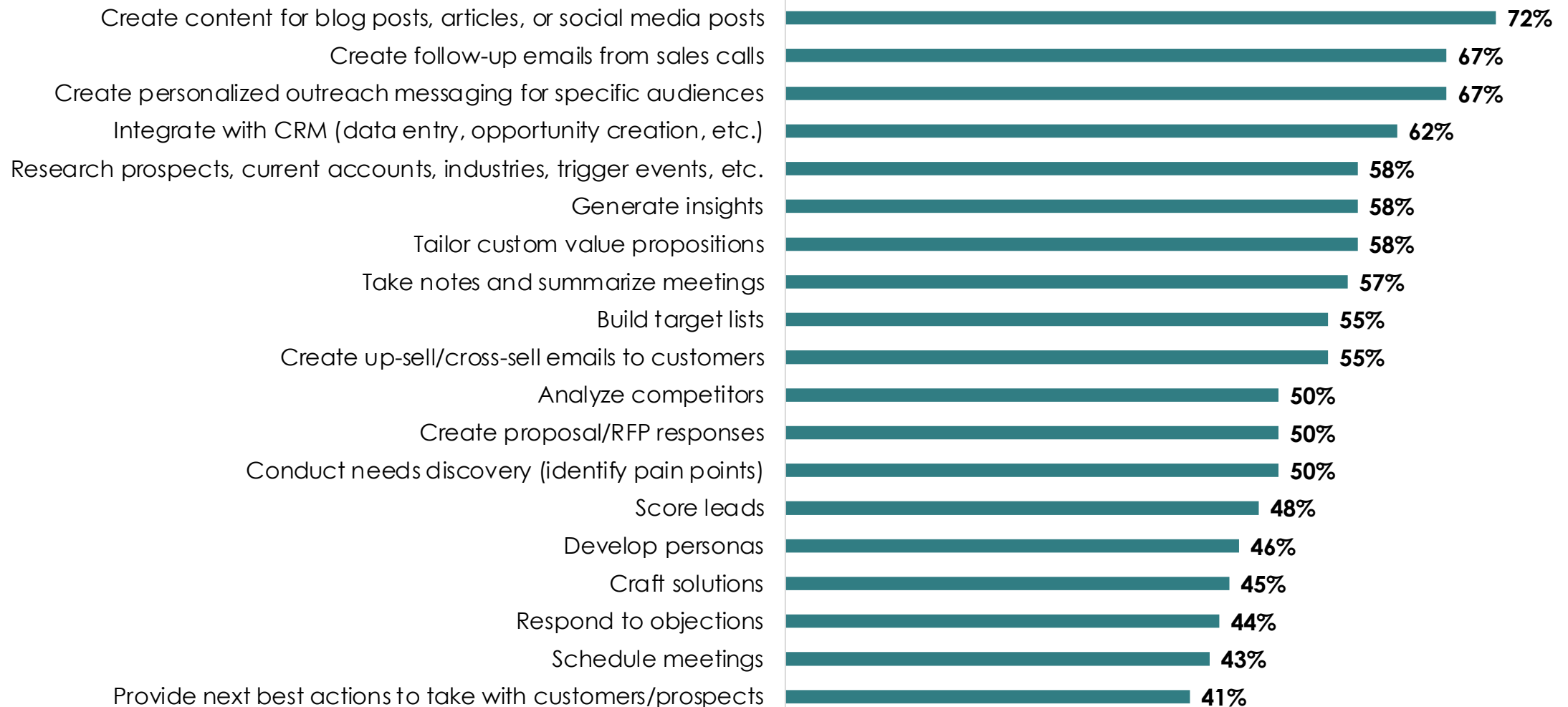
**more likely** to use AI tools daily or frequently.

Source: Use of AI in the Sales Process, RAIN Group Center for Sales Research.

# How Sales Teams Are Getting Value from AI

## I/My team get(s) value by using AI in the sales process to...

% Strongly Agree/Agree

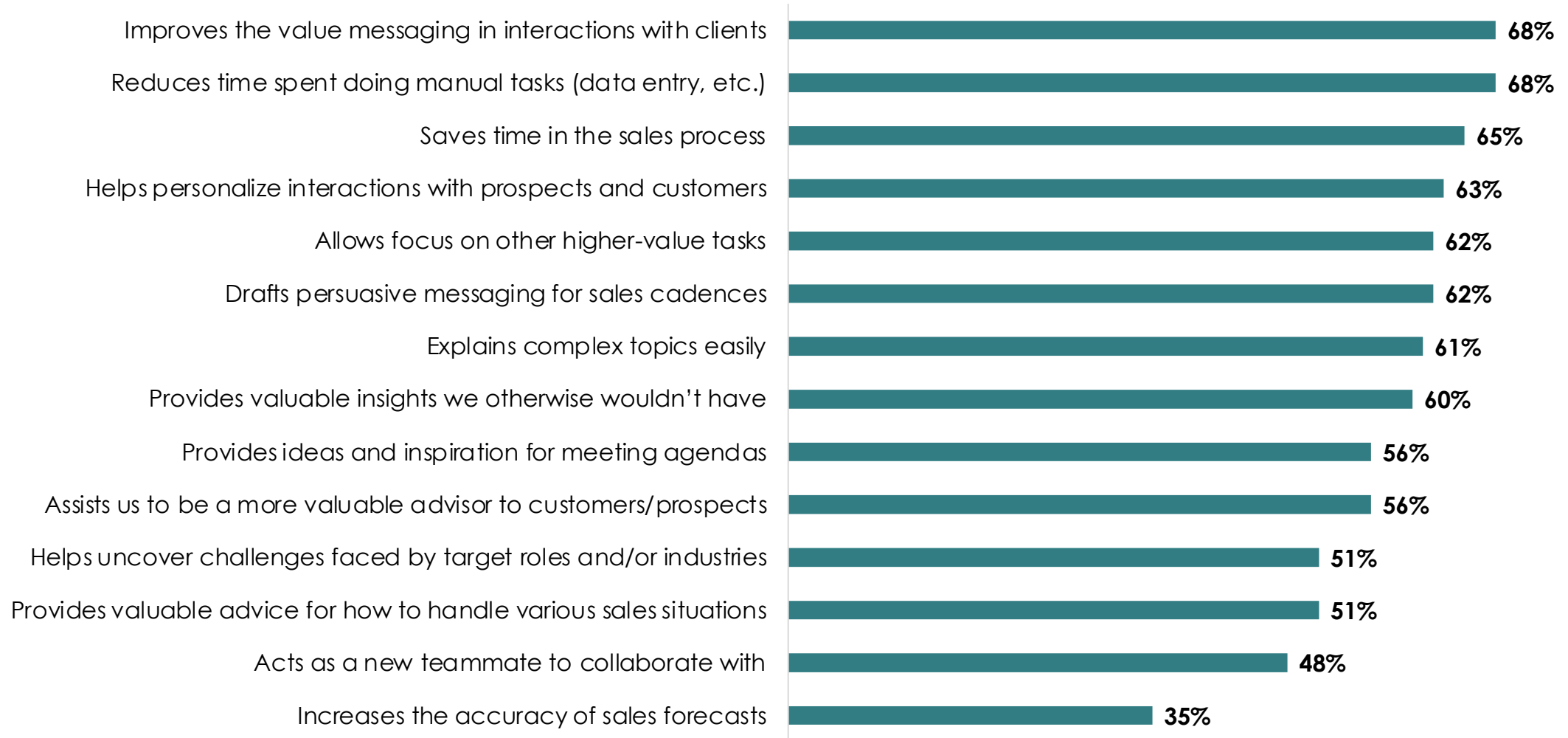


Source: Use of AI in the Sales Process, RAIN Group Center for Sales Research.

# Benefits of AI for Sales Teams

## I/My team's use of AI in the sales process...

% Strongly Agree/Agree



Source: Use of AI in the Sales Process, RAIN Group Center for Sales Research.

# How Do AI Advocates Use It?

Respondents reporting the greatest impact on sales performance and productivity from AI are significantly more likely to strongly agree:



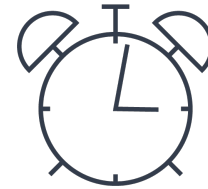
**4.8x**

AI acts as a **new teammate** to collaborate with



**3.4x**

AI helps **uncover challenges** and pain points



**3.3x**

AI **reduces time** spent doing manual tasks



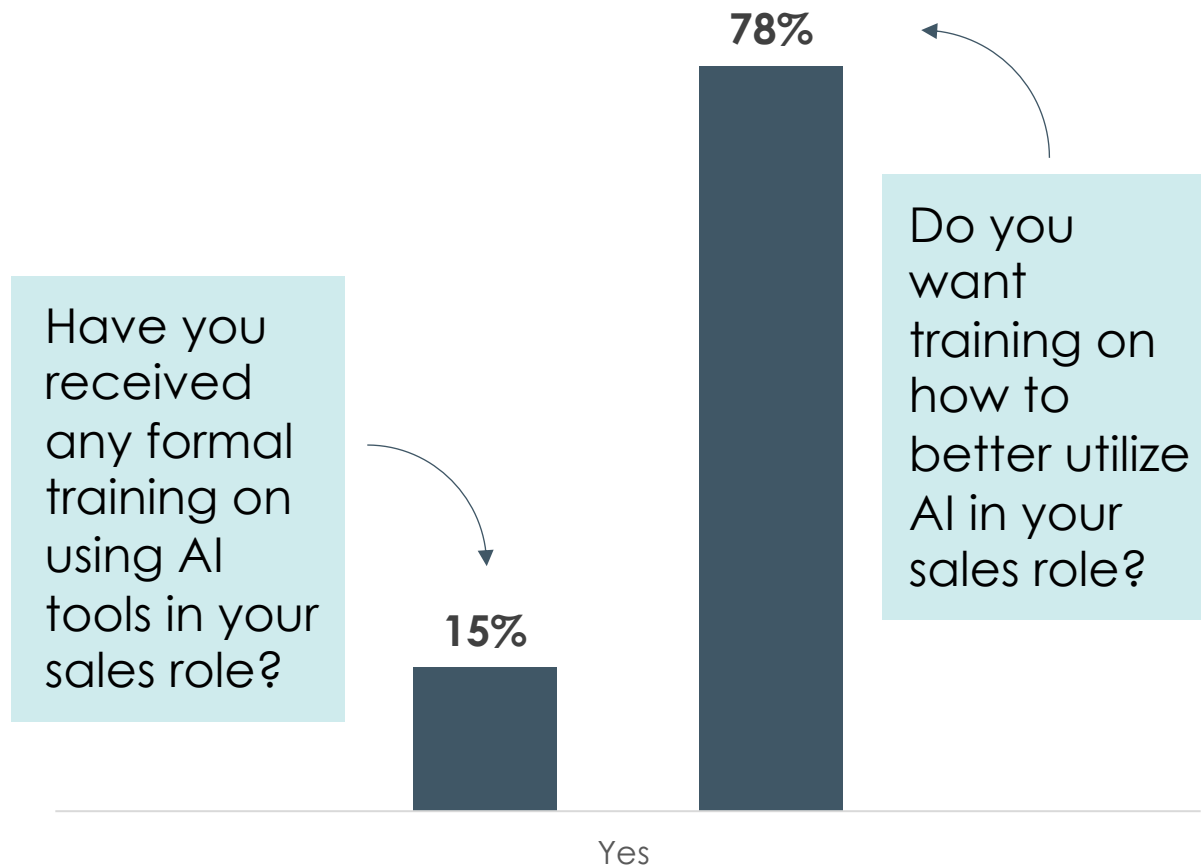
**3.1x**

AI allows focus on other **higher-value tasks**

# Sales Teams Want Training on How to Use AI

## AI Training: Received and Desired

% Respondents



Those reporting the **greatest impact** on sales performance and productivity from AI are

**1.7x**

**more likely** to have received training on using AI tools in their sales role.

Source: Use of AI in the Sales Process, RAIN Group Center for Sales Research.



# Our Top 4 Recommendations Based on the Findings

- 1. Explore AI and Use Frequently:** Get started by using chatbots. Chatbots are used most often and are a good starting point to explore how AI can help your sales process. Then, expand to explore other tools suitable for your sales process, e.g., email automation and personalization, AI-driven content recommendations, predictive analytics, lead scoring, and so on.
- 2. Communicate an AI Policy:** Clearly communicate a policy around the use of AI, including data privacy, security, corporate IP, recommended tools, etc. Respondents reporting the greatest impact of AI on sales performance are 1.8x more likely to say their organization clearly communicates such a policy.
- 3. Gain a Competitive Advantage:** Some sales teams are already seeing an impact on their sales performance and productivity from the use of AI. The benefits of those reporting the greatest impact range from saving time, being a more valuable advisor to customers and prospects, providing valuable insights they otherwise wouldn't have, and improving the value messaging with clients. Don't get left behind.
- 4. Promote Continuous Learning:** Enablement and sales leaders can invest in and deliver training to help their sales teams achieve the benefits and address the challenges around AI use. In the absence of company-sponsored training, sellers and sales managers can develop their own skills in the use of AI.

# Bring AI Training to Your Organization

- **90-minute seminar on AI for Prospecting**
- **Includes:**
  - Access to 2 online prospecting training modules
  - Attraction Campaign Brief Template
  - Using AI in Sales Prospecting Checklist
- **Customization options**, including small-group coaching, custom prompts, and content tailored to your organization

Contact us at [info@raingroup.com](mailto:info@raingroup.com) or call 508-405-0438 to learn more.





We are leaders in sales research and intellectual capital. We've published 5 books, including the Bestseller *Rainmaking Conversations*, *Insight Selling*, *Virtual Selling*, and *Not Today: The 9 Habits of Extreme Productivity*. We've won multiple awards for our sales white papers, our industry-leading blog has been featured on dozens of "Top Sales Blog" lists, and we've written for hundreds of well-known business publications.

Each year we launch groundbreaking new studies in sales—from both buyers' and sellers' perspectives—through the RAIN Group Center for Sales Research.

## RAIN Group Center for Sales Research

We research sales relentlessly to uncover what works, what top performers do differently, and how buyers make decisions.

Research focus areas include:

- The Top-Performing Sales Organization
- Sales Prospecting
- What Sales Winners Do Differently
- The Value Driving Sales Organization
- Sales Productivity
- Strategic Account Management
- Sales Negotiation
- Virtual Selling
- Sales & Sales Management Skills

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