



Applying AI in Sales Workflows

A Practical Guide



Introduction:

AI's Sales Operations Potential

Your sales process is an intricate machine; keeping it running smoothly is hard work.

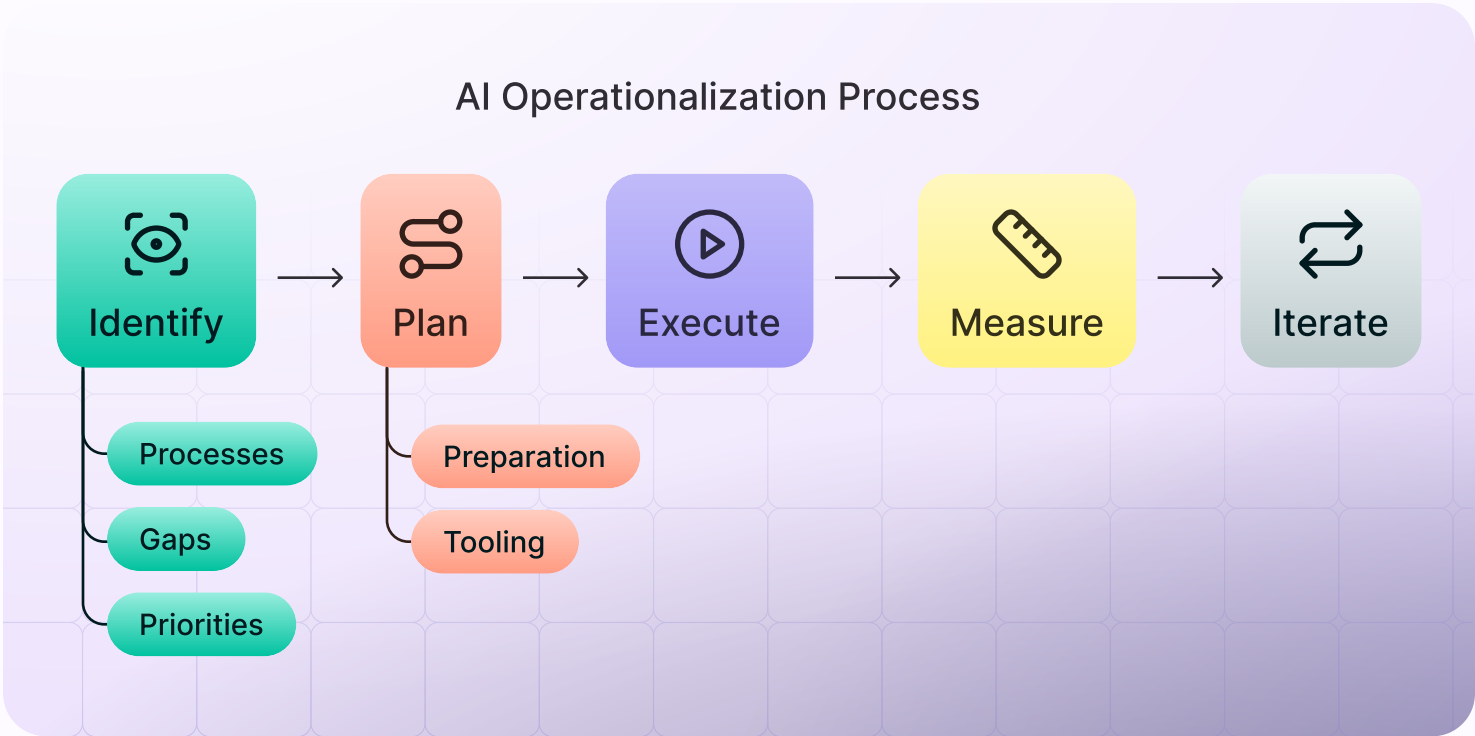
Generative AI technology has been making news for a while. But do you know what hasn't been fully explored? Its massive potential to improve your sales operations. You've probably experimented with GenAI, but its operational uses are still unclear. You need **efficient processes** and **predictable outcomes**, and the right AI applications can make that happen.

After decades of sales experience, thousands of hours, and countless operational experiments, we've developed a proven 10-step process for using AI to optimize systems and processes for growth. This workbook outlines strategic approaches, processes, and frameworks that will help you operationalize AI. We hope this guide helps you on your journey to **accelerated and sustainable revenue growth**.

Table of Contents: The AI Operationalization Process

Below you will find an overview of the approach we have used to effectively apply AI to sales operations. We will walk you through each step of the AI operationalization process with practical frameworks and examples.

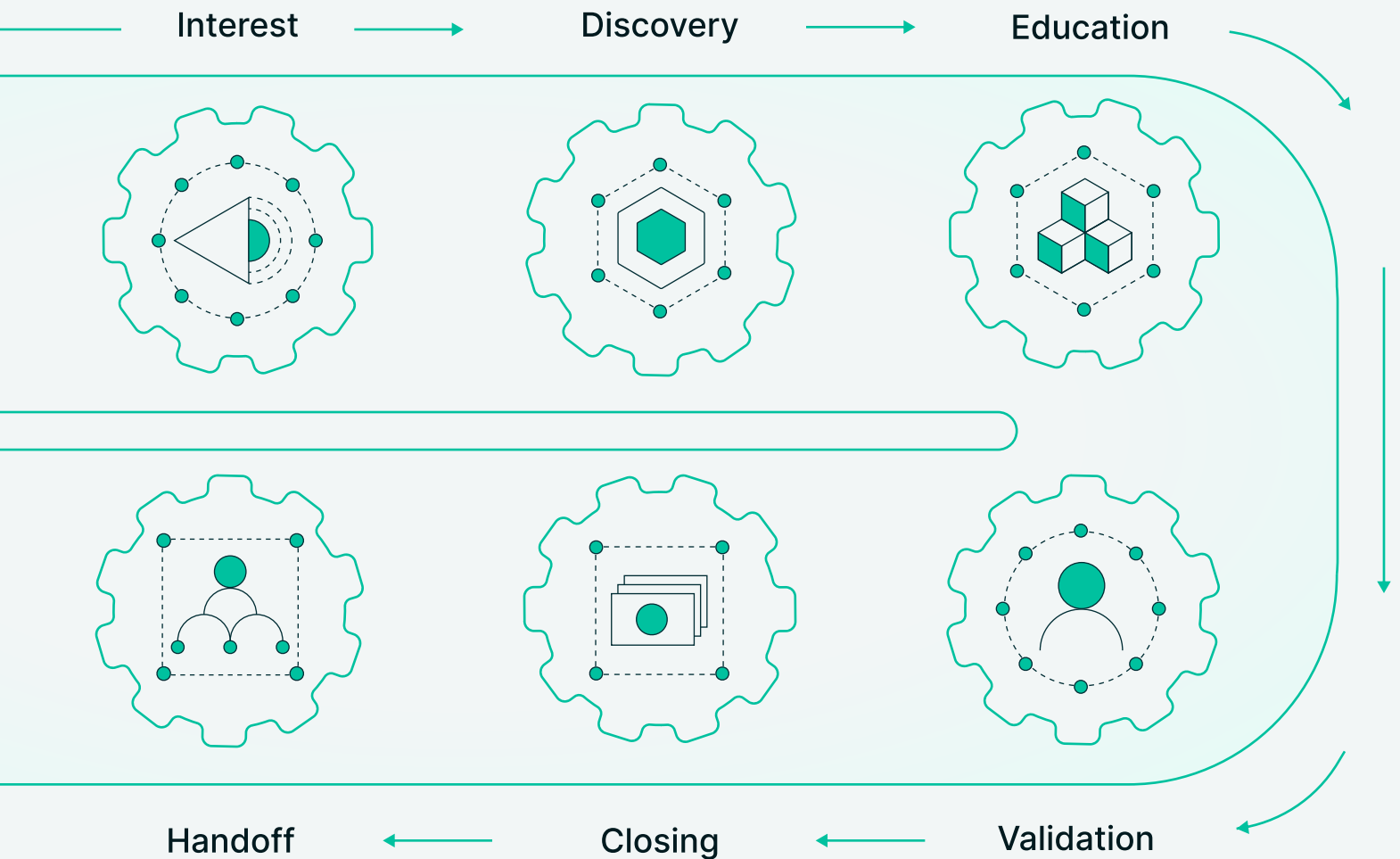
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1. Identify Processes: What Processes Should You Optimize with AI?

Map Your Revenue Factory

A sales workflow is essentially an assembly line for manufacturing revenue. The first step of operationalizing AI is making sure you have a clear understanding of **your** revenue factory. To do this, define the outcomes of each stage of the pipeline process and identify the microprocesses that deliver those outcomes.



Example Process Map

The end result should be a rough model of your revenue manufacturing line.
Your revenue factory processes should look something like this:

1. Interest	4. Validation
Outcome: Advancement to discovery	Outcome: Confirmed purchase decision
Processes:	Processes:
Cold outreach	Product demonstration
Content distribution	Decision tree outlining
Lead qualification	Timeline confirmation
Social selling	ROI calculation
2. Discovery	5. Closing
Outcome: Scheduled product demo	Outcome: Closed deal
Processes:	Processes:
Needs assessment	Negotiation
Content distribution	Contracting
BANT qualification	Approval
Stakeholder identification	Process mapping
3. Education	6. Handoff
Outcome: Completed product demo	Outcome: Successful implementation
Processes:	Processes:
Product demonstration	Handoff call
Content distribution	Scheduling
Objection handling	Timeline confirmation
Workshops	Information gathering

This map will help you identify the specific processes where you can implement AI.

***Pro Tip:** use this editable [process map template](#) to get started.

Detail Your Sales Processes

After you have an overview of your sales processes, it will help to detail each one. For a deeper dive, define the following:

- ✓ **Who** is responsible for the process
- ✓ What **tools** are used to execute, track, and facilitate the process
- ✓ The **value** each process brings to the organization
- ✓ The **cost** of each process

By systematically analyzing these four elements for every process, you can get a clear understanding of its strategic importance to your sales operations.

Example Process Detail

Let's use **lead qualification** as an example. A detailed view of an individual process should look something like this:

- ✓ **Responsible party:**
Head of sales
- ✓ **Tools:**
Hubspot CRM
- ✓ **Value:**
High-potential prospects identified, conversion rates increased, resource allocation optimized, improved sales productivity, revenue growth
- ✓ **Cost:**
Personnel time, software fees

Defining and listing these details will help you prioritize AI use cases in your sales organization.

2. Identify Gaps: Where Will AI Make the Biggest Impact in Your Organization?

Once you've mapped the processes and outcomes of each pipeline stage, you can identify the problems that prevent the processes from efficiently delivering the intended outcomes.

Score Stages for Prioritization

Before identifying specific gaps in each process, prioritize pipeline stages. For each stage, rate the following criteria on a scale of 1-5:

Criteria	Score
1. Impact on Revenue: How directly does this stage affect closed won revenue?	
2. Customer Satisfaction Influence: To what extent does this stage impact customer experience and retention?	
3. Operational Inefficiencies: How many bottlenecks or inefficiencies exist in this stage's processes?	
4. Scalability Potential: How much room for growth and improvement does this stage have?	
5. Resource Utilization: How efficiently are we using resources in this stage?	
6. Strategic Alignment: How much does optimizing this stage align with overall company goals?	

Criteria	Score
7. Interdepartmental Dependencies: How much do other departments rely on stage for their success?	
8. Technology Gap: How outdated or inefficient is the current technology stack in this stage?	
9. Competitive Advantage: How much could optimizing this stage set the company apart from competitors?	
10. ROI Potential: What's the expected return on investment for optimizing this stage?	
Total Score:	

Identify which stage has the largest gaps (and optimization potential) by taking these steps:

- 1. Calculate the total score** for each department by totaling the ratings for all criteria.
- 2. Rank the departments** based on their total scores, with the highest score indicating the highest priority for optimization.
- 3. Weight certain criteria more heavily** based on your company's specific goals and challenges.

By systematically evaluating each stage using this score sheet, you can make data-driven decisions about where to focus your optimization efforts. This approach helps ensure that resources are allocated to the areas that will have the most significant impact on the company's overall performance and growth.

People, Processes, Tools: Categorize Process Gaps

Think of all of the operational problems your team is experiencing right now. In our experience, every problem will fit into one of the buckets in this matrix framework. Each problem will involve People, Processes, and/or Tools.

Starting with the priority stage you identified in the previous step, categorize each problem into one or more of these boxes to understand what kind of problem it is and how to approach solving it.

***Pro Tip:** Get started with this [process gap map template](#).

People	Process	Tools
Skill Do they have the skills they need to get the job done?	Outcome Is the process geared to deliver the right outcome?	Automation Should the tool perform its task(s) automatically?
Motivation Are they motivated to get the job done?	Workflow Is the process designed to deliver the intended outcome?	Use Is the tool being used appropriately?
Capacity Do they have the capacity to get the job done?	Bottleneck Is any part of the process slowing or stopping operations?	Purpose Is the tool a good fit for its intended purpose?

Example Gap List: Lead Qualification

Here's what a list of the gaps in the lead qualification process could look like. We focused on this process for clarity, but ideally your list will span all of the sales activities your team engages in.

People	Process	Tools
Skill Team members lack the training to effectively qualify leads.	Outcome The qualification process is resulting in poor quality leads.	Automation Leads get routed manually to sales reps in the CRM instead of automatically segmented on specific criteria.
Motivation Ineffective incentives lead team members to prioritize lead quantity over lead quality.	Workflow The outlined lead qualification workflow is unclear.	Use The CRM is not appropriately leveraged to access and add to qualification notes in lead records.
Capacity Certain team members have too many responsibilities to properly qualify leads.	Bottleneck The qualification process relies on complex manual scoring models that slow lead flow and hurt data quality.	Purpose The process relies on automation tools that are not fit for lead qualification purposes and often require manual fixes.

3. Identify Priorities:

How Do You Prioritize AI Applications?

You have a solid categorized list of operational problems that AI could help you solve. To execute the solutions, you need to decide which applications to start with. We recommend first identifying which process gaps are mission critical. These are the do-or-die applications that address existential business threats.

In your gap list, evaluate each operational problem you identified on the effort required to implement AI to solve it and potential impact the solution would make.

Rate Use Cases for Effort

To rate each gap for the effort required to fill it with AI, use a formula like the one below. Be as scientific as possible, but estimates will work for some variables.

$$E = (C_d + C_i + C_m) * (1 + R) * (1 + T)$$

- E** = Effort score
- C_d** = Development cost (normalized on a scale of 1-10)
- C_i** = Implementation cost (normalized on a scale of 1-10)
- C_m** = Maintenance cost (normalized on a scale of 1-10)
- R** = Risk factor (0-1, where 0 is low risk and 1 is high risk)
- T** = Time factor (0-1, where 0 is short-term and 1 is long-term)

Rate Use Cases for Impact

To rate each gap for the impact of an AI solution, use a formula like this one below. Again, make your ratings as scientific as possible to ensure quality results, and make estimates where exact figures are unavailable.

$$I = (P * S * A) + (ROI * W)$$

- I** = Impact score
- P** = Performance improvement (percentage increase)
- S** = Scale of application (1-10, where 1 is limited and 10 is company-wide)
- A** = Alignment with strategic goals (1-10, where 1 is low alignment and 10 is high alignment)
- ROI** = Return on Investment (percentage)
- W** = Weighting factor for financial impact (0-1)

Prioritize Use Cases with the Effort / Impact Matrix

To prioritize use cases, first set a threshold for high impact and low effort. With the scores you've assigned to each use case, place each problem in the corresponding box in the table below.



Example Priority List

Here's what a categorized and prioritized use case list could look like after you've done this exercise. Note that this list will vary depending on the context of your specific business. You may even prioritize the same example use cases in a completely different order.

Low Effort							
Priority #3	Impact	Effort		Priority #1	Impact	Effort	
Meeting scheduling	10	10		Lead routing	16.5	10	
Lead follow up	9.5	8		Lead scoring	15	11	
				Data entry	14.5	11	
				Content distribution	13.5	10	
Low Impact				High Impact			
Priority #4	Impact	Effort		Priority #2	Impact	Effort	
Onboarding	9	20		Intent detection	15.5	17	
				Next step recommendations	14	19.5	
				Opportunity & Risk Scoring	16.5	20	
			High Effort				

Now that you've prioritized AI applications, move immediately to planning and preparation for mission critical use cases. Once those use cases have been addressed, you can start tackling the items in the P1 and P2 sections. Don't worry too much if you don't get to P3 use cases, as low impact applications are less critical.

Pro Tip: Use this editable [effort impact scorecard](#) to rate your AI applications.

Remember, the purpose of this exercise is identifying and executing the applications that will have the most impact. We recommend not pursuing P4 use cases at all. The juice (impact) just isn't worth the squeeze (effort).

We recommend revisiting this exercise on a regular basis. Usually, a quarterly or annual review will be often enough, depending on your operational cadence and capacity for implementing and operationalizing AI.

4. Plan Preparations: How Do You Get Ready for AI Operationalization?

A successful technology implementation requires preparation. AI is no different. To get an optimal time-to-value when you operationalize AI, you may want to run these preparation activities as a parallel process to identifying use cases. That you'll be ready to launch sooner.

Take these steps to prepare for AI operationalization:

- ✔ **Make sure your systems accurately reflect business strategies and operations.**

This comes back to the outcomes and processes we defined in the first step of this guide. If your systems don't align with the way the business actually runs, no AI solution can provide useful and valuable analysis.

For example, you could have a clear pricing strategy and review process, but maybe your CRM isn't set up to track target deal values and actual deal values for comparison. Your AI solution won't have the context it needs to model the business, analyze operations, and deliver useful insights.

- ✔ **Make sure your data is accurate.**

This may involve manually reviewing your data and fixing all of the errors you find. While this will take some time and effort, data quality is essential for a successful AI implementation.

For example, you might find close dates preceding entry dates in your CRM system. Implementing the CRM may have even reset close dates to the implementation date. Resolving this issue will make sure the analysis your AI does is accurate and useful.

At the heart of all of these activities is the evergreen **GIGO principle**: Garbage In, Garbage Out. Without clean, structured, comprehensive data, you'll get no value from your AI solutions.

- ✔ **Make sure your data is comprehensive.**

Tracking all relevant data in your systems improves the quality of AI analysis and automation.

For example, we've seen companies track some of the stages of their sales process in their CRM, and the rest in a spreadsheet or other system. Everyone has their reasons for the system setup. The key is ensuring that as much data as possible is accessible for analysis and automation.

- ✔ **Make sure to implement and enforce effective data policies.**

Without rules about how to structure, verify, and record data, it will be difficult to maintain quality in AI insights.

For example, you might hold regular training and review sessions to ensure your sales reps properly input lead information in the CRM after every interaction. Without some form of accountability, you won't get consistent, reliable results from your AI solutions.

***Pro Tip:** use this [AI preparation checklist](#) to make sure you're ready.

5. Plan Tooling:

How Do You Evaluate AI Solutions?

When you've effectively prepped for the AI applications you've identified, the next step is to evaluate and select an AI solution to address the operational problems you've prioritized. You could use any mixture of homegrown and third-

party AI solutions to accomplish the goals you've selected. While different tools are better suited for various use cases, when it comes to operationalized AI, there are some essential criteria for success.

AI Solution Evaluation Rubric

Use this rubric to evaluate any AI solutions you're considering. For each feature, assign a weight for how important it is to solving your operational problems.

We recommend using a total weight of 100 to get a score in a percentage format. You can also add any other critical items for your use cases and use the scores to compare different solutions side by side.

AI Features and Functionality Fit	Weight	Score
1. AI Maturity Fit? (See TACO model below.)		
2. Natural Language Processing?		
3. Predictive capabilities?		
4. Machine learning capabilities?		
Infrastructure		
1. Compatibility with current systems and APIs?		
2. Scalability?		
3. Ease of implementation and maintenance?		

Purpose		
1. Designed for use in your industry/vertical?		
2. Use case alignment?		
Pricing		
1. Priced within budget?		
2. Pricing model: per head, flat fee, usage?		
3. Contract terms?		
Data Security		
1. Proper protocols?		
2. Security systems?		
3. Certifications?		
Implementation		
1. Timeline		
2. Time to value?		
Total:	100	

This evaluation is subject to your own judgment. However, we recommend not selecting an AI solution that doesn't satisfy roughly 80% of these requirements.

***Pro Tip:** use this [AI solution scorecard](#) to rate potential tools.

Where Is the Tool on the AI Operationalization Curve?

If you're having a hard time conceptualizing the operational capabilities of an AI solution, consider this simple framework. We use the TACO model to visualize AI operationalization as a progression of four distinct phases:

1. Tasker:

AI functions as a basic utility, performing specific tasks on command without proactive engagement.

Example: Using Generative AI to summarize lengthy documents and emails.

2. Automator:

AI becomes more interactive, offering reminders and support on a predefined cadence, but still primarily responds to direct requests.

Example: Automatically generating routine reports such as weekly sales summaries or monthly user engagement metrics.

3. Collaborator:

AI evolves to proactively anticipate needs and execute actions without explicit prompting, functioning as a partner and cooperater.

Example: Proactive chatbots that initiate conversations based on user behavior.

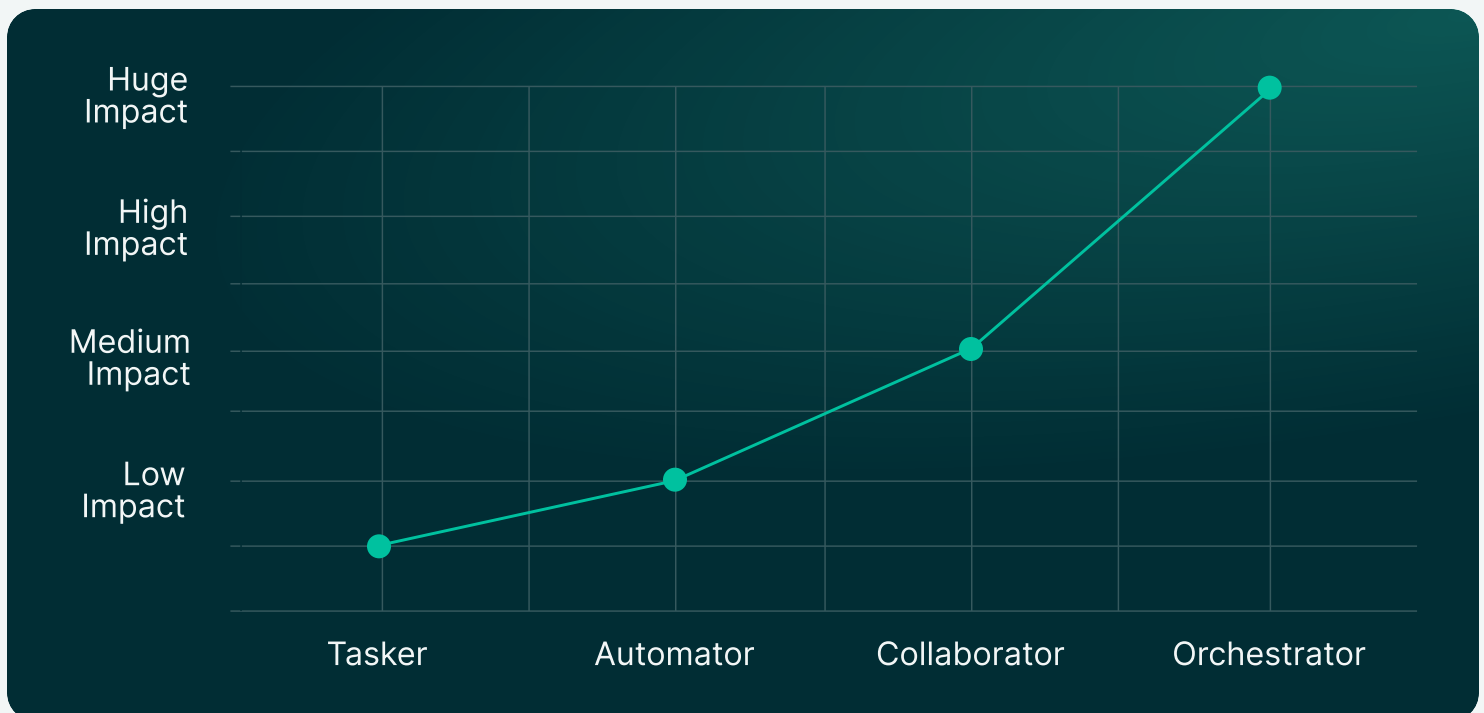
4. Orchestrator:

AI reaches a level where it can autonomously make capabilities in operational capabilities.

Example: Managing ecosystems where multiple human employees and AI agents collaborate with each other to achieve complex tasks at scale.

As you evaluate any AI tools you plan to use in your operations, make sure you consider the maturity of the solution. Are most of the use cases in the tool phase? Then you might not see as much impact as a solution with more collaborator and orchestrator functionality. Rate any AI tools you look at accordingly.

Stages of AI Maturity



6. Execute:

How Do You Implement AI Successfully?

You've put in the work to get all of your ducks in a row. It's finally time to push the launch button. Here's a practical breakdown of AI implementation steps:

1. Identify Data Sources

Assess available internal datasets and external APIs relevant to the AI solution. Evaluate data quality, quantity, and accessibility to ensure sufficient information for model training and operation.

2. Prepping for integration

Clean and standardize data, addressing inconsistencies and missing values. Set up data pipelines and storage systems to handle the volume and velocity of data required for AI processing.

3. Integrating

Develop APIs or connectors to link the AI system with existing SaaS infrastructure. Implement security measures and access controls to protect sensitive data during integration.

4. Testing

Conduct thorough testing of the AI model's performance, accuracy, and reliability using diverse datasets. Perform user acceptance testing to ensure the AI solution meets business requirements and end-user expectation.

5. Training

Educate employees on AI capabilities, limitations, and ethical considerations. Provide hands-on training for technical teams on model maintenance and for end-users on effectively utilizing AI-enhanced features.

6. Beta Release

Launch a limited release to a select group of users or clients for real-world testing. Gather feedback on user experience, performance, and any unforeseen issues to address before full deployment.

7. Go Live

Deploy the AI solution to the entire user base, ensuring scalability and performance under full load. Monitor system performance and user adoption closely during the initial launch period.

8. Communicate

Develop clear messaging about the AI implementation's benefits and limitations for stakeholders. Provide ongoing support and education to users to maximize adoption and address concerns.

9. Iterate

Continuously collect user feedback and performance metrics to identify areas for improvement. Regularly update and refine the AI model based on new data and evolving business needs.

Pro Tip: use this [implementation checklist](#) to plan a smooth AI launch.

7. Measure:

How Do You Set KPIs and Calculate ROI?

If you can't measure the impact of solving a problem, it's not worth executing. Operationalizing AI is no different. We recommend tracking a few KPIs to understand and optimize the value an AI solution delivers.

Defining KPIs to Evaluate AI Success

There are two primary KPIs you can track to quantify the value of operationalized AI:

✔ Time Saved:

Estimate the time each automated task or process takes. Then track how many of these actions the AI performs. A simple multiplication function will show the total time saved in each use case. You can use this metric to estimate the amount of money you saved as well.

✔ Revenue Impact:

Whenever possible, track the revenue generated from automated activities. Adding this to the time saved will give you a comprehensive view of the value generated by each use case.

Not only will combining these two metrics will help you understand the financial impact of each application, it will also help you calculate the return on the investment.

Calculating ROI

With the time saved and revenue generated metrics, you can perform a simple ROI calculation to evaluate any AI application's effectiveness. Calculate ROI on a regular basis to ensure optimal performance and test tweaks you make to systems and processes.

Use the form below to estimate the ROI of an operationalized AI application:

Return	
Time Saved	
Labor Cost	
Attributed Revenue	
Total Return	= Time Saved * Labor Cost + Revenue
Investment	
Total Investment	[solution cost]
ROI	= (Total Return - Investment) / Investment

While some of these measures are rough estimates, this calculation will still give you a clear sense of the value any AI application delivers.

Pro Tip: Use this [editable ROI calculator](#) to estimate the return on your AI investment.

Evaluating AI as a Team Member

The more mature an AI application is, the more you can think of it as a member of your team. You can evaluate its performance accordingly, on metrics like the following:

1. Sales-related metrics (for customer-facing roles):

- ✔ Quota attainment percentage
- ✔ Demo-to-close rate
- ✔ Average deal size
- ✔ Sales cycle length

2. Product-related metrics (for technical roles):

- ✔ Number of features/products successfully launched
- ✔ Bug resolution rate
- ✔ Code quality metrics (e.g., test coverage, code review scores)

3. Customer success metrics:

- ✔ Customer satisfaction score (CSAT)
- ✔ Net Promoter Score (NPS)
- ✔ Customer retention rate
- ✔ Time to resolution for support tickets

Evaluation will look different depending on your company and the applications you employ. However you do it, make sure to regularly measure and review the performance of AI applications.

8. Iterate on the Plan:

How Do You Consistently Improve AI Applications?

No AI solution or application is perfect. You will find areas for improvement and fine tuning. Iterating on an AI application is similar to the process you'd use for any system in your business:

- ✔ **Hypothesize:**
Review available data and come up with ideas for changes to make to your system and/or processes. Choose one change or variable to test.
- ✔ **Experiment:**
Change the variable and run the process.
- ✔ **Review Results:**
Track the results to see results of the test reflected in the KPIs. If you get the desired result, continue on. If not, repeat the process.

Tuning and testing your AI applications like this will help you get the most value over time.

Pro Tip: Use this [AI iteration brief template](#) to continuously improve your AI applications.

9. Manage Risk:

How Do You Avoid Common AI Pitfalls?

AI is not a magic bullet. There are real risks to consider in any application of operationalized AI. Consider the following to avoid common problems down the road:

- ✔ **Information Security:**

Whenever possible, regulate access to proprietary data and make sure AI models operate on your servers. This will mitigate the security risks of AI use.

- ✔ **Stakeholder Alignment:**

We've already mentioned clear communication, and it's worth repeating. Make sure everyone affected by your project understands its goals and the processes implemented. This will prevent future mixups and objections to AI applications.

- ✔ **Workforce Readiness:**

Educate and train employees to work with AI. This will help you and your team effectively implement all of the steps for operationalizing AI, realizing more value sooner.

- ✔ **Data Quality:**

AI is only as good as its context. Dirty data will give you dirty results. Your data must be comprehensive, structured, and accurate to get the desired results.

By taking these steps to mitigate risk, you can save yourself a lot of trouble as you operationalize AI.

Pro Tip: Use this [pre mortem brief and agenda template](#) to help you continue improving your AI applications.

10. Learn More about Operationalized AI

At Chief, we've developed a predictive operations platform that gives sales leaders the answers to their performance questions.

We're helping growing sales teams use AI to make their operations more **predictable** and **efficient**.

[Schedule a consultation with us](#)

to learn how we can help you operationalize AI and make better, faster decisions.