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Three Steps to Boost Your Presales Process Using AI

AI is here to stay. With the sales landscape becoming more competitive, presales resources are more precious than ever. We found three steps for integrating AI effectively into your presales process. Follow these steps to boost your presales process.

Step 1:
Identify where AI is currently utilized in your organization

- Common uses of AI include analyzing recordings, coaching, or predicting future revenue.
- Keep a record of this and update it as you add to your tech stack.

Step 2:
Identify areas and the specific roles that could benefit from AI or automation.

- Educate employees and increase their overall product knowledge with Chatbots.
- Power repetitive tasks for sales engineers to get back valuable time.
- Gather customer insights to increase the quality of customer discovery sessions.
- Mitigate security risks by leveraging predictive analytics.
- Amass buyer intent data to see how buyers are conducting their research.
- Educate buyers for a more independent buying journey.

Step 3:
Implement AI to support Sales without removing the human element.

- Be clear about AI usage throughout the buyer journey.
- Stay informed about ethical guidelines and potential AI regulations.
- Apply AI cautiously to avoid overcoaching or strategy shifts without a complete understanding.
- Stay abreast of advancements and adapt your skills accordingly.

Based on Consensus' 2023 DEMOFEST
Panel of Presales Superstars