AI : YOUR ~~THREAT~~ EDGE

AI is *under-utilized and misunderstood.*

Under-utilized because AI can do way more for you than you might think.

Misunderstood, because AI isn't here to replace you. Human relationships are irreplaceable—they're as vital to sales as oxygen is to life.

AI is here to help, to boost what you're already great at. It's only replacing those who don't adapt.

And if you do...You'll be ahead of the game, closing more deals and stressing way less.

So, a shake-up is coming...

Is it going to take jobs? yeah of course.
Do you have to be worried already? depends...
Are you ready to bring AI in your day to day?

You + AI = Superseller, and this is where you begin

We created this **playbook** to not only give you an overview of how AI can fit into your sales routine—whether it's prospecting, meetings, follow-ups, and more—but also to guide you with detailed, step-by-step actions to help you get started right away. You'll see why it beats the old-school ways and check out some of the best tools to help you get started.

This playbook will equip you to:

🕐 Save at least 10hrs/week, currently wasted in manual admin tasks

🎯 Build great relationships with your customers and managers

📊 Use invaluable insights, generally hidden in the ocean of data

💰 Potentially close a lot more

But nothing beats those stress-free evenings when you know the CRM is up-to-date and there are no follow-ups hanging over your head.
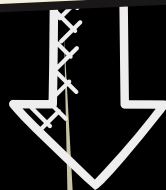
Now before we get into it, you should know that this playbook is NOT a few things

NOT !

A SHAMELESS SELF-PROMO PARADE

A BUFFET OF BLANDNESS

A DUMPING GROUND FOR RANDOM ADVICE

LET'S GET INTO IT!

ONLY WHAT YOU NEED

1 BE YOUR INBOX & CALENDAR NINJA

Keeping up with endless emails and back-to-back meetings is draining.

AI tools are transforming how you manage it all—automating scheduling, prioritizing key emails, AI-written emails, and ensuring you never miss a follow-up. This saves you hours every week and makes your day far more productive.

Without AI

- Hours spent on cleaning the inbox every week
- Delayed responses often cost deals
- Important emails missed altogether

With AI

- Ask AI to write any email you want - save time and bypass writer's block
- Reduce average response time by > 50%
- Unlock hours for more active selling

Top rated AI tools for Inbox & Calendar Management

Superhuman Reclaim.ai Motion Boomerang SaneBox Missive
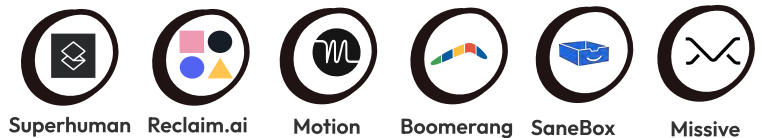
Each of these tools are great, but Superhuman stands out for its focus on sales teams

Superhuman helps you fly through your emails

HERE'S HOW IT WORKS!
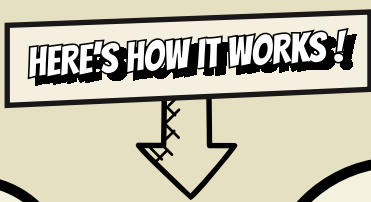
① Be more responsive to what matters most

Superhuman's Inbox Prioritization feature helps you focus on high-priority emails by organizing your inbox into custom categories like VIP senders or team messages. This ensures that urgent emails are front and center, allowing you to process key tasks more efficiently.

With automated sorting based on criteria like the sender or subject, you can significantly reduce the time spent sifting through your inbox, making email management faster and more streamlined.
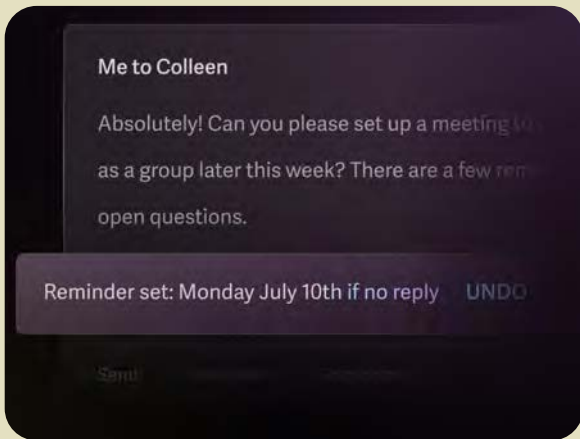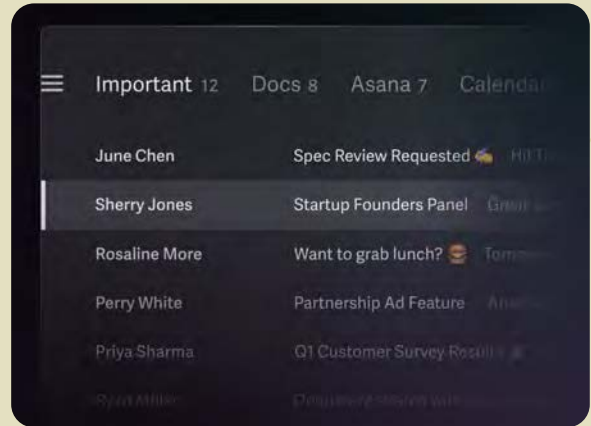
② Follow up on time, every time

When you send an email, just choose a time — say, 3 days. If you don't hear back by then, Superhuman will remind you to follow up. You'll always follow up on time, every time.

③ Built-in Calendar Scheduling

Superhuman integrates your inbox and calendar seamlessly. Quickly check availability, schedule meetings, and send invites all from within your inbox, ensuring smooth and conflict-free scheduling with just a few clicks.
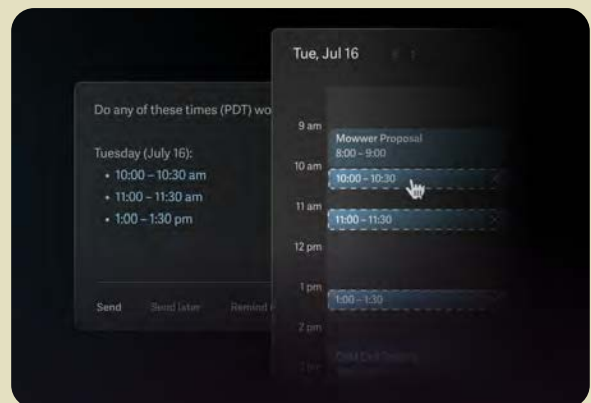
And there's a lot more that similar tools can do.

If you're still manually managing your inbox, you're missing out on the opportunity to streamline and enhance your productivity in ways that could make all the difference in achieving your goals.

2 KNOW WHICH DEALS TO PRIORITISE , BACKED BY DATA

Spending time on the right opportunities is key—you know it can make all the difference between hitting your quota or spinning your wheels. And even top researchers back this up. Forrester found that prioritizing effectively can boost win rates by 20% and productivity by 28%. Harvard says focusing on the right deals can cut your sales cycle by 30%, speeding up revenue. With AI in the mix, you can take deal prioritization to a whole new level, making smarter, faster decisions.

20% ↗ WIN RATE

28% ↗ PRODUCTIVITY

Without AI

- Up to 4 hours wasted per week deciding which deals to focus on
- Drop in win rates as you often miss high-potential deals
- Reduced sales efficiency due to misallocated resources

With AI

- Accurate deal scoring boosts close rates by 30%, as per a McKinsey report
- Save 4 hours weekly, improving productivity
- Improve ROI by focusing on high-ROI deals

Top rated tools that help with Deal Prioritisation

Salesforce   Aviso   Gong   Clari   InsideSales
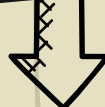

Here's one way to do it in a few steps:

① Prioritise early leads with an automation between your CRM & Clay

READ ON!

Here's how it works

ⓐ Setup Clay

Connect your CRM (e.g., HubSpot, Salesforce) to start importing lead data automatically.

ⓑ Create a New Table in Clay

Set up a table with columns for key lead data: Industry, Company Size, Persona Fit, Source, and Lead Score.

ⓒ Automate Data Import from CRM

Set up an automation to pull new leads from your CRM into the Clay table whenever a lead is added or updated.

ⓓ Enrich Lead Data with Online Databases

Use integrations like Clearbit or LinkedIn to enrich the imported leads with additional information like industry, company size, and persona details

ⓔ Tag High-Intent Sources

Define high-intent sources (e.g., referrals, inbound) and set rules in Clay to automatically tag these leads for easier prioritization.

ⓕ Set Up a Lead Scoring System

Create a scoring system based on criteria such as matching ICP, persona fit, and source intent. Use Clay's automation rules to calculate and update lead scores dynamically.

ⓖ Rank Leads Automatically

Configure the table to sort leads by the calculated lead score, ensuring high-priority leads are always visible at the top.

ⓗ Monitor and Refine

Regularly review the workflow and adjust scoring rules or enrichment parameters based on lead quality and conversion outcomes.

② Then use HubSpot's deal scoring to prioritize ongoing deals

HubSpot helps you score deals by assigning numerical values based on factors like deal stage, size, and engagement history. This automated scoring system prioritizes your deals, focusing on those more likely to close. You can set up custom scoring properties that update automatically as deals progress.

It's all about "separating the wheat from the chaff "

Regardless of the tools you use, prioritizing deals effectively can be a game changer for your sales processes, especially if you're juggling multiple deals at once.

DEAL NAME	DEAL SCORE	DEAL STAGE	CLOSE DATE (GMT+5:30)
	45	Stage 0. Lead (Sales)	--
	67	Stage 3. PoC (Sales)	Sep 26, 2024 9:02 PM GMT+5...
	44	Stage 2. Discovery (Sales)	Oct 1, 2024 4:27 AM GMT+5:30
	73	Stage 3. PoC (Sales)	Sep 30, 2024 3:11 AM GMT+5:...
	36	Stage 2. Discovery (Sales)	Sep 29, 2024 11:47 PM GMT+...

3 ROLEPLAY SALES CALL SITUATIONS WITH AI

Practicing sales calls can be tough—finding time, staying consistent, and getting useful feedback isn't easy. But it's essential for building confidence, handling objections smoothly, and sharpening your pitch. Reps who practice regularly close more deals and are 50% more likely to hit their quotas (SalesHacker).

That's where AI comes in—giving you instant feedback and on-demand role-play sessions so you can improve anytime, anywhere.

Without AI

- Fewer opportunities to improve because of limited availability

- Inconsistent feedback, depends a lot on personal preferences

- Considerable time consumed in organising practice sessions

With AI

- Practice anytime, anywhere, on demand

- Consistent, data-driven feedback

- AI can simulate any scenario you want, making it scalable

Top Rated Tools That Help with Simulating Sales Calls
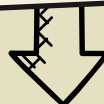
Hyperbound   SecondNature   Allego   SalesHood

If you're not looking to invest in a new tool, you can still roleplay for free. Here's how:

ChatGPT 🟢 : Your roleplay partner

HERE'S HOW IT WORKS!

① Prepare your prompt

Gather relevant details about your deal to be included in the prompt. This ensures that the simulation is as realistic as possible:

A prompt that worked well for us. Just Copy and modify it as you wish.

- **Who you're talking to:**

  Provide a quick background on the customer, like their role, industry, and any relevant details.

- **Customer's personality and potential objections:**

  Describe the customer's typical concerns, objections, and personality traits.

- **Your product details:**

  Share a brief description of your product, focusing on the key features and benefits.

- **Reason for the call:**

  Explain the objective of the conversation, what you hope to achieve, and the relevant context.

- **Roleplay instructions:**

  Outline how you wanted ChatGPT to engage with you during the roleplay— whether you want tough objections, a cooperative tone, or any such specific scenarios.

==Quick Note: We've written an entire blog about this.== Check it our here

```
                                          prompt

Who I'm talking to: I'm speaking with a VP of
IT at a mid-sized SaaS company in San
Francisco (250-500 employees). This VP has a
strong background in IT and DevSecOps, is
known for adopting new technologies, but is
also a critical thinker who may raise concerns
about setup, security, and integrations.


Customer's personality and potential
objections: However, he is also a sound
critical thinker, doesn't shy away from asking
hard questions, and can raise major objections
related to setup, security, and integrations
of our product.


My product details:  My product, Sybill, is an
AI assistant for sales reps that automates
tasks like note-taking, meeting summaries,
follow-up emails, and CRM updates, enhancing
sales efficiency and visibility across the
organization.


Reason for the call:  A few sales reps at
their company have enjoyed using Sybill during
a free trial and got their manager interested.
The manager now wants the VP of IT and the VP
of Sales to evaluate it further. The VP of IT
could either block the deal or become a
supporter, depending on this call's outcome.


Roleplay instructions:  I want you to roleplay
as the VP of IT, challenging me with tough
questions and showing skepticism while also
being open to innovation. We'll do 5 rounds of
exchange. Respond with "okay" to start.
```

② Input the prompt into ChatGPT

Enter the prepared prompt into ChatGPT.

④ Request feedback from ChatGPT

After the roleplay, ask ChatGPT for feedback on your performance. Focus on areas like objection handling, rapport building, or closing techniques to enhance your skills.

③ Engage in a 1:1 roleplay

Conduct the roleplay by conversing with ChatGPT, treating it as your prospect. Practice handling objections, refining your pitch, and navigating the conversation based on the scenario provided. You can also use the new 'Audio' feature to make it even more realistic.

Roleplaying sales calls with ChatGPT is like having a trutworthy "wingman" who's always ready to help you practice and nail your pitch. It's your reliable partner to sharpen your skills before the big game, ensuring you're ready to crush your real calls.

4 BUILD STRONG CUSTOMER RELATIONSHIPS

Building strong relationships is crucial for closing deals—trust and rapport are key. Did you know 81% of buyers are more likely to engage with reps that make a personal connection? But when you're busy with tasks like note-taking, you miss chances to connect. AI is changing that. By handling tasks like note-taking and CRM updates, AI frees you up to focus on building those connections and closing more deals.

81% ↗ BUYER ENGAGEMENT
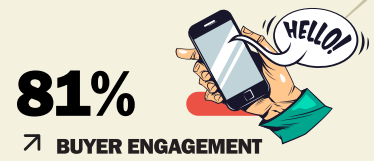
Without AI

- Manual note-taking impacts rapport-building by 50%, says HBS
- ~5 hours per week wasted on taking and managing notes
- Mistakes in notes lead to poor follow-ups, resulting in lower conversion rates

With AI

- Better relationships improve win rates by 15% as per Forrester & Gartner
- Better relationships result in a higher CLV
- 5 hours saved per week, enhancing productivity

Top Rated AI Meeting Summarisation Tools

Sybill   Gong   Chorus   Otter   Fireflies

Here's how you can get started in a few steps:

Engage a reliable AI note-taker so that you can focus on your prospects without worrying about note-taking

THIS IS WHAT A RELIABLE NOTE-TAKER LOOKS LIKE
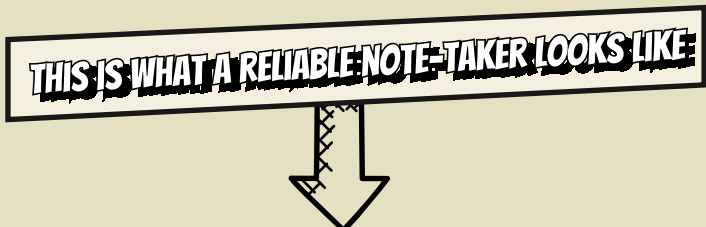
① AI note-takers can be game-changers when reliable, but a nightmare if they miss the mark.

Your note-taker should have the following non-negotiable capabilities:

Understands the context

An effective AI note-taker should understand the context based on the overall discussion and accurately summarize relevant details.

For example, if a client mentions "budget constraints" in both discovery and negotiation calls, the AI distinguishes between exploring flexibility (discovery) and a firm stance on pricing (negotiation). This context ensures the summary reflects the right sentiment, allowing you to tailor next steps, like offering financing or adjusting the proposal.

Accurate

Precisely captures all important details without missing critical information.

Provides a sales-specific meeting summary

Delivers a summary focused on key sales outcomes and points that impact the deal.

Reads buyers' expressions

Detects non-verbal cues to understand buyer sentiment during the conversation.

Captures pain points & interests

Notes down customer needs and interests that could affect the deal.

Only Sybill does all the above, letting you do just one thing - *Focusing on your prospect!*

Sales folks love **Sybill's AI notetaker.** Curious to know why?

Check it Out

---

② Follow up swiftly and in context, while not missing any next step

Swift, context-aware follow-ups are key to building strong relationships and keeping deals moving smoothly. As you know, AI handles this brilliantly. Check page #12 for a guide on using AI to write instant, personalized follow-ups in your style.

③ Go the extra mile to help them build a business case

Use ChatGPT to build a business case. You can copy and modify this prompt for your purpose:

`prompt`

```
I need help building an ROI-focused business
case for a prospect I'm selling Sybill to.
Here's the context:

Prospect Information: Mid-sized SaaS company
(250-500 employees), San Francisco-based,
tech-forward but concerned about cost, setup
time, and integration challenges.

Current Situation: Their sales team spends 10
hours per week on manual tasks like note-
taking, CRM updates, and follow-ups, leading
to inefficiencies and missed opportunities.

Key ROI Metrics They Care About:
Time Saved: Reduction in hours spent on manual
tasks per week.
Increased Win Rates: Due to better follow-ups
and sales insights.
Enhanced Productivity: Measured by the number
of additional deals closed per quarter.
Cost Savings: Reduced operational costs by
automating manual processes.

Objective: Demonstrate how Sybill can save
time, improve win rates, increase
productivity, and reduce costs through AI-
driven automation of sales workflows.
Highlight specific ROI metrics, like
percentage improvements in productivity and
potential revenue increase.

Can you help me craft a compelling business
case, including these details and any
additional data points I might need?"
```

5 FOLLOW-UP ON TIME WITH PERSONALISED EMAILS

You already know how tough it is to stay on top of timely follow-ups. Juggling endless tasks means it's easy to miss that crucial window. But you also know that following up within an hour can boost conversions by as much as 60%, making all the difference in closing deals.

This is where AI changes everything—automating personalized emails instantly, so you never miss a follow-up. No more stress, just more deals.

60%
↗ **CONVERSIONS**

Without AI

- ~4 hours wasted per week on manually writing follow-ups
- Delays lead to reduced engagement & conversion
- Missed next steps lead to low conversion

With AI

- Personalised, contextual emails in 1-click
- Every customer feels prioritised
- Extra 4 hours every week for active selling

AI tools that generate the perfect follow-up

Fully automated

Sybill

Requires manual steps

ChatGPT   Claude   Jasper AI

AI tools for generic follow-ups

Automated but generated basic emails

Salesforce   Apollo.io   Outreach

If you're not looking to invest in a new tool,
you can still save hours using ChatGPT to generate follow ups. Here's how:

ChatGPT can generate amazing follow-ups. All you need is the right prompt.

HERE'S HOW YOU CAN DO IT

① **Review your call transcript**

Obtain the transcript from your sales meeting.

② **Use a specific prompt in ChatGPT**

Copy and modify the following prompt based on your preferences:

`prompt`

```
Write a follow-up email to a VP of Sales at an Enterprise B2B SaaS company based on the
instructions & call transcript below.

Instructions:

Start with a light note referencing a conversation starter from the meeting to show
rapport.
Provide a 2-3 line overview of the meeting, summarizing key points and the clear
outcome.
Outline the next steps with the responsible person identified.

Length: Medium length, under 10 seconds to read.

Tone: Professional but friendly.

Transcript: [Insert call transcript here]
```

③ **Review and edit the generated email**

Check the email for accuracy and make any edits needed to ensure it reflects the meeting's details and your personal style.

While the above approach is good (and free), it doesn't offer scalability as it requires you to manually repeat this process every time.

Some AI tools have made it extremely easy to handle follow ups. While most can generate instant and contextual follow-ups, some tools go beyond to create perfect emails.

Sales folks like you love **Sybill's AI follow-ups**, and for good reasons:

1. It learns your style to write as you would.
2. It lets you create and save templates to make your best scalable.
3. It lets you modify the tone, length, and a lot more.

Here's how Sybill creates the perfect AI follow-up

ⓐ **Analyses your meetings**

Captures the context, next steps, and everything else that you care about, accurately.

ⓑ **Crafts follow-ups in 1-click**

Includes receiver's emails, subject, acknowledgement, brief meeting summary, and next steps.

ⓒ **Edit as you wish**

Personalise tone, length, subject, and even the body to fit the context.

ⓓ **Customised templates**

Create templates for every deal stage, in your own language so that your best becomes scalable.
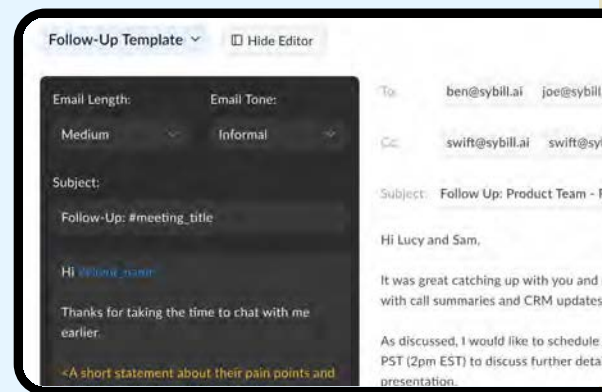
Check it Out

6 PUT CRM UPDATES ON AUTOPILOT

Manually updating the CRM is tedious, error-prone, and takes away from selling. Yet, keeping it updated is key—companies with well-maintained CRMs see a 29% boost in sales and happier customers.

AI changes the game by automating updates, reducing errors, and sending real-time alerts, helping reps close deals 20% faster (Forrester, Gartner). It lets you focus on selling, not data entry.

29%
↗ BOOST IN SALES

20%
↗ FASTER DEAL CLOSED

Without AI

- ~5 hours spent every week on manually updating the CRM
- Inaccurate forecasting and planning
- Lost deals due to inaccurate information in CRM

With AI

- Save 5 hours every week
- CRM data error rate reduced by >75%
- Informed managers are happy managers

AI tools that capture every insight in the CRM fields

Fully automated

Sybill

Requires manual steps

Salesforce + Zapier   HubSpot + Zapier

Autofills basic CRM entries

Automated generic updates

Spoke   Sonnet ai

CRM data is a goldmine of insights, but only if it's accessible:

Your CRM can be fully automated Contact creation, basic enrichment, and every critical CRM field you care about

HERE'S HOW YOU CAN DO IT
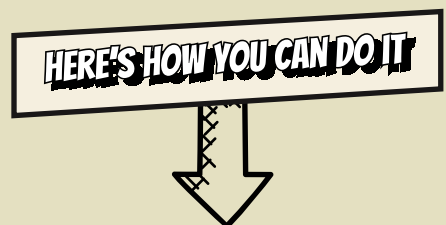
① Automate contact creation & basic enrichment

Contact creation
Automated contact creation can save you considerable manual effort. There are several ways you can do that:

From a meeting
You can connect Zoom etc. to your CRM via Zapier to automatically create or update deals with new contacts after each meeting. Zapier handles tasks like adding contacts, updating deals, and logging meeting summaries seamlessly. For detailed steps, ask ChatGPT or follow Zapier's setup guide.

From emails
To automate contact creation from email threads, connect your email provider to your CRM and enable email parsing to capture contact details from signatures. Set up automation to link new contacts to existing deals, keeping your CRM updated without manual effort.

Basic enrichment

While popular CRMs are well equipped to enrich basic information of your deals, such as company size, industry etc, you can also automate this using 3rd party tools such as Clearbit, ZoomInfo etc.

② Autofill CRM fields including:

Qualification data like [MEDDPICC] [BANT] [SPICED] [...]

And every other critical info like [Tech Stack] [Product Requirements] [License Count] [Competition] [...]

AI tools can analyze your meeting data and autofill the above (and more) CRM fields, without you having to lift a finger.

However, not every tool does it right

Most AI tools update CRM fields based on only the most recent meeting, but Sybill...

takes it further by considering the entire history of interactions, ensuring a more comprehensive and accurate update.

Other tools just analyse the recent converastions, leading to half-baked insights in the CRM

[Check it Out]

Meeting 1 → Meeting 2 → Meeting 3
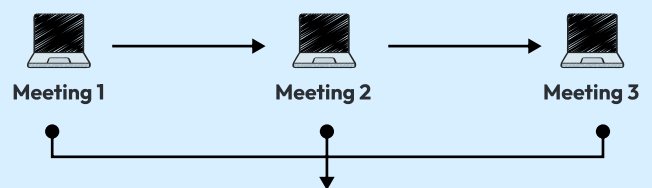
Vant.io - New Deal   Open in CRM ↗

Fields   Contacts

Buying Signals   ⚡ Buying Signals ⋮
John Smith shows interest in exploring Sybill's product.
He acknowledges the need for better Salesforce hygiene and automation.
He expresses dissatisfaction with the cost of Chorus, indicating openness to alternatives.
He shows interest in Sybill's ability to extract insights and push them to Salesforce.
He acknowledges the need for regimented note-taking and tracking deal opportunities.

Current Status   ⚡ Current Status ⋮
The overall outcome of the meeting was positive, with the client, John Smith, expressing interest in Sybill's capabilities to automatically update CRM fields based on conversations and indicating a desire to share the information with his team for further consideration. John's buying intent appears cautiously optimistic, requesting additional information for internal circulation and suggesting a broader conversation could be beneficial, though concerns about Wi-Fi issues and previous commitments to Chorus were noted.

7 BE YOUR OWN COACH

Continuous self-coaching and learning are crucial in sales to stay competitive and adapt to changing customer needs. By using AI tools like ChatGPT and many others, you can analyze your sales calls and get tailored feedback, skill ratings, and insights on missed opportunities. This approach can boost your close rates, reduce time-to-close, and increase customer satisfaction with immediate, actionable guidance.

Without AI

- Limited access to timely coaching due to manager schedules
- Coaching quality varies based on manager experience
- One-on-one coaching is not scalable for large teams

With AI

- AI delivers uniform, data-driven insights
- Access coaching anytime, without delays
- AI provides tailored advice for skill refinement

Top rated AI tools for sales coaching

Gong   Chorus   ChatGPT   Hyperbound   Sybill

If you're not looking to invest in a new tool, ChatGPT can be a great resource. Here's how:

ChatGPT: Your reliable AI sales coach

BELIEVE IT OR NOT, IT CAN HELP WITH A LOT!

HANDLING OBJECTIONS, NEGOTIATION SKILLS, CLOSING TECHNIQUES, FOLLOW-UP STRATEGY, PIPELINE MANAGEMENT, RAPPORT BUILDING, EMOTIONAL INTELLIGENCE, THE LIST GOES ON...

① Get Feedback on MEDDIC, SPICED, BANT, and More

Use ChatGPT to receive feedback on your sales calls based on specific sales methodologies (like MEDDIC, SPICED, BANT, Challenger Sale etc.). This will help you understand how well you're applying these techniques and where you can improve.

Here's a prompt that could come handy:

prompt

```
Based on the following sales call transcript, provide feedback using the MEDDIC selling
methodology. Highlight where I effectively used the MEDDIC (Metrics, Economic buyer,
Decision criteria, Decision process, Identify pain, and Champion) and where I could
improve. Suggest specific changes or additional questions I could have asked to better
align with this methodology.

Transcript: [Insert call transcript here]
```

② Self-Assess Your Key Selling Attributes

Ask ChatGPT to rate and provide feedback on your key selling attributes, such as building rapport, delivering demos, active listening, and negotiation skills. This helps you identify your strengths and areas for improvement.

Here's a prompt that could come handy:

prompt

```
Analyze the following sales call transcript and rate my performance on key selling
attributes: building rapport, giving a demo, active listening, and negotiation skills.
Provide a rating out of 10 for each attribute and include detailed feedback on strengths
and areas for improvement for each. Offer specific examples from the transcript to support
your feedback.

Transcript: [Insert call transcript here]
```

③ Enhance Your Discovery and Questioning Techniques

Use ChatGPT to improve your discovery calls by getting insights on better questions to ask and identifying threads you might have missed pulling. This will help you uncover deeper needs and pain points during conversations.

Here's a prompt that could come handy:

prompt

```
Review the following discovery call transcript and provide feedback on how I could have
improved my discovery process. Identify what additional questions I could have asked, what
important threads or topics I missed pulling, and any potential areas where I could have
dug deeper to uncover more needs or pain points of the prospect.

Transcript: [Insert call transcript here]
```

Possibilities are endless...

Think of ChatGPT as having a coach in your corner, ready to jump in at a moment's notice—your secret weapon to staying ahead of everybody else. After all, in sales, it's all about having the right tools to turn the tide in your favor.

8 PROACTIVELY COMMUNICATE DEAL PROGRESS

Manually updating managers via Slack, email, or calls takes time away from selling and leads to delays. But proactive updates are key to speeding up deals, improving forecast accuracy, and driving team success. AI automates this, sharing real-time updates seamlessly, keeping everyone aligned without the manual effort.

Without AI

- Manual sharing is prone to missed insights, often leading to lost deals
- Considerable waste of time for the rep as well as manager
- Inaccurate or delayed updates result in unreliable forecasts

With AI

- ☑ Real-time updates with confidence that nothing slips through cracks.
- Reps focus on selling, not writing updates on slack or getting on 1:1 calls.
- Accurate forecast allows for better planning and course correction.

Top rated tools to automate deal updates

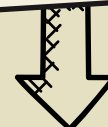Hubspot   Salesforce   Zendesk   Close.com   Sybill

If you're not looking to invest in anything new, some of the tools you already use might help. If you

Use HubSpot? Salesforce? You can automate deal updates

It literally takes only a few mins to setup

HERE'S HOW YOU CAN DO IT

Let CRM automations handle deal updates

CRM automations can save you the hassle of manually communicating simple deal updates to your team. While you still need to get on that 1:1 to brainstorm strategies, updates like Deal stage, Objections, Pain Points, complete CRM notes, etc. can be automated. For instance, in case of HubSpot, you can use the **Workflows** feature to setup automations.

One such automation could be between HubSpot and Slack to send the following info:

- Deal Stage Updates
- New Decision Maker Added
- Objection Raised by Prospect
- Deal Moved to Negotiation Stage
- Pricing Approval Requested
- Competitor Mentioned
- Proposal Sent

- Contract Sent
- Deal Closed (Won/Lost)
- New Product Requirement or Gap Identified
- Timeline Change Update
- Budget Confirmation Logged
- Upsell/Cross-Sell Opportunity Identified

For use cases where a direct automation is not possible, tools like Zapier and Make.com come in handy as intermediaries.

One obvious catch is that CRM automations are useful only if your CRM is always updated.

As mentioned on page #14, some AI tools automate CRM entries, but most fail at making it comprehensive and leak-proof. Sybill has solved this problem and sales teams love us for it.

How does Sybill proactively communicate deal progress?

Sends the perfect meeting summary to Slack & Email

Sybill generates a magic summary of your meetings, including the meeting outcome, key takeaways, prospect pain points, non-verbal analysis etc. and sends it directly to a shared Slack channel as well as your Inbox

Sends critical info to your CRM

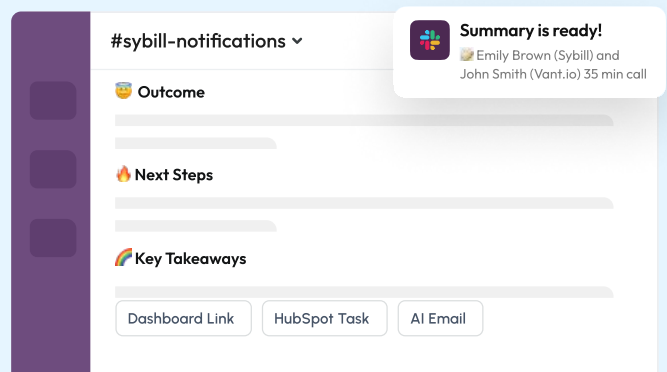Sybill analyses meetings to autofill CRM fields, including MEDDIC, BANT, as well as Product Gaps, Competition etc.

Webhook Automation

Setup automations between Sybill and your workplace apps where you need any deal or meeting information

With Sybill,

Your team is always up to date
Your CRM is always up to date
And you're left with extra time to seal the deal!

Check it Out

#sybill-notifications

Summary is ready!
Emily Brown (Sybill) and John Smith (Vant.io) 35 min call

😎 Outcome

🔥 Next Steps

🌈 Key Takeaways

Dashboard Link   HubSpot Task   AI Email

9 CREATE HIGH-QUALITY SALES COLLATERAL WITH AI

Manually creating high-quality sales collateral can be exhausting and pulls you away from selling. Yet, you know how crucial personalized, polished materials are for engaging prospects and driving conversions, leading to faster sales cycles and better deals. AI now makes this effortless, automating the creation of tailored content, so you can quickly generate professional, customized materials that boost your efficiency and results.

Without AI

- Manually creating assets takes hours, leaving little time for selling
- Customisation takes time, often leading to generic messaging
- Inconsistency across different assets

With AI

- ✅ Generate impeccable assets in minutes
- 🎨 Consistent branding, design, and messaging across assets
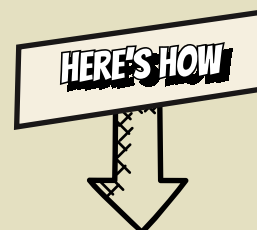- ⏰ Saved hours could be used for actual selling

Top rated AI tools to create sales collateral

Tome   Beautiful.ai   Pitch   Canva   MS Copilot

If you're not looking to invest in a new tool, ChatGPT (or other LLMs) also come handy. Here's how:

① **ChatGPT can do wonders. Helping you create amazing pitch decks is just one of them**

HERE'S HOW

✦ Ask ChatGPT to suggest layout, flow of information, and even the actual content

While ChatGPT cannot create the actual pitch deck, it can give you every ingredient you need to create one. You save hours of effort that would otherwise go into research, as well as ensure that you get the best of the advice out there.

Here's a prompt to help you get started:

```
I want to create a pitch deck for <my company>, specifically tailored for a mid-sized B2B
SaaS company. The goal is to showcase how  <my company> can address their sales challenges,
increase productivity, and improve deal velocity. The deck should be visually engaging,
concise (10-12 slides), and highlight  <my company>'s unique value proposition and
competitive advantages.

Here are some key details about  <my company> and the <client>:

Problem Statement: [Insert the client's specific sales challenges here]

<my company>'s Solution: [Describe how <my company> solves these problems]

How It Works: [Outline <my company>'s process, from meeting to CRM update]

Benefits to the Sales Team: [Highlight the main benefits and value <my company> brings]

Competitive Advantage: [Show how <my company> stands out compared to competitors]

Customer Success Stories: [Include relevant success stories or testimonials]

ROI & Metrics: [Provide key metrics that demonstrate <my company>'s impact]

Pricing & Plans: [Summarize <my company>'s pricing options for mid-sized companies]

What I need:

Ideal flow of information: How to structure the pitch deck to create a logical and
compelling narrative.
Content for each slide: Text for each section that is professional yet conversational.
Visual ideas: Suggestions on how to design each slide to make the presentation modern and
engaging.
Font recommendations: Fonts that ensure readability and align with <my company>'s brand.
Please provide the content and structure that would make this deck impactful and polished.
```

② Beyond pitch decks, ChatGPT can help you with literally anything - one pagers, competitor comparisons etc.

All you need to do is provide it with a specific prompt.

If you're wondering whether ChatGPT can craft the perfect prompt based on your raw inputs, you're in luck (we all are ;) — it absolutely can. Just ask.

🎨 **If you're looking for tools that can also design for you:**

Tome   Beautiful.ai

▦ **Tools that can help with templates, layout and basic suggestions**

Pitch   Canva

SYBILL IS YOUR RELIABLE

AI SALES ASSISTANT

CHECK IT OUT HERE