

THE AI-ENABLED SELLER

7 PHASES

AI doesn't close deals. It makes sure you show up to every stage sharper, faster, and better prepared than you would have been without it.

RESEARCH & PLANNING

Research Synthesis · Perspective Shifting · Question Generation

Account & Industry Brief

"Summarize this company's business model, market pressures, and strategic priorities. Focus on what leaders are likely worried about."

Role-Based Lens

"How would this situation look different to a CFO, operations leader, IT leader, or design leader?"

02

PROBLEM FRAMING

Synthesis · Reframing · Value Articulation

Problem Framing Options

"Generate two or three ways to frame the core problem, each with different implications for how we position."

Value Translation

"Translate the customer's language into potential business impact — cost, time, risk, or opportunity."

Assumption Stress Test

"What must be true for this framing to hold? Where is the evidence weak or missing?"

04

BUYING PROCESS

Signal Detection · Risk Surfacing · Momentum

Buying Signal Check

"Based on meeting notes and communications, what signals suggest real commitment versus polite interest?"

Risk Heatmap

"Where are assumptions still unvalidated across budget, authority, timing, or priority?"

Stakeholder Gap Scan

"Which roles or perspectives appear underrepresented or missing in this process?"

06

PHASE 01

PHASE 02

PHASE 03

PHASE 04

PHASE 05

PHASE 06

PHASE 07

ACCOUNT SELECTION

Research · Prioritization · Assumption Testing

Change Signal Ranking

"Rank these accounts by likelihood of near-term change. Explain why each ranks higher or lower."

False Positive Scan

"Why might this account look promising but fail to move forward?"

Account Readiness Snapshot

"Summarize what is changing at [Company]. Focus on leadership, strategy, and financial pressure. No solutions."

01

DISCOVERY

Question Refinement · Signal Capture · Synthesis

Pre-Meeting Question Refinement

"Refine these discovery questions to be clear, neutral, and open-ended. Remove leading language."

Real-Time Note Support

"Summarize key statements, decisions, and tensions from this meeting transcript or notes."

Fact vs. Assumption Sort

"Separate confirmed facts, inferred assumptions, risks, and open questions from these notes."

03

SOLUTION DESIGN

Narrative Shaping · Risk ID · Clarity Testing

Solution-to-Problem Alignment

"Map each element of this solution to the specific problem and value it addresses. Identify gaps or overreach."

Role-Based Narrative Test

"How would this proposal land with a CFO, operations leader, IT leader, or procurement?"

Clarity & Credibility Scan

"Flag vague claims, jargon, or promises that lack evidence."

05

CLOSE & LEARN

Outcome Synthesis · Pattern Detection · Learning

Win/Loss Summary

"Summarize why this deal was won or lost using notes, emails, and decisions."

Assumption Check

"Which early assumptions proved true? Which did not? What does that tell us about how we qualified?"

Method Feedback

"What should be reinforced or avoided earlier next time? What one thing would have changed the outcome?"

07

The prompts are starting points. Edit them to fit the deal. The best version is always the one that reflects what you actually know.

AI TACTICS FOR SELLERS

A prompt is only as good as the context behind it. Before any of these, tell the AI who you are, what you sell, and who you're selling to.

ACCOUNT RESEARCH & TARGETING

COMPANY INTELLIGENCE

Account & Industry Brief

"Summarize [Company]'s business model, market pressures, and strategic priorities. Focus on what their leaders are likely worried about."

Change Signal Ranking

"Rank these accounts by likelihood of near-term change. Explain why each ranks higher or lower."

False Positive Scan

"Why might this account look promising but fail to move forward?"

STAKEHOLDER RESEARCH

Exec Profile

"What do you know about [Name] at [Company]? Focus on their priorities and what they're likely under pressure about."

MEETING PREPARATION

DISCOVERY PLANNING

Assumption Builder

"Based on what I know about this account, what assumptions am I probably making that I haven't tested yet?"

Discovery Question Generator

"Generate discovery questions that would validate or disprove our assumptions without leading the customer."

Contradiction Finder

"Where do this company's stated priorities, public messaging, and investments appear misaligned?"

PRE-MEETING BRIEFING

One-Page Brief

"Summarize everything relevant about [Company] and [Name]. What I know, what I believe, and what I still need to find out."

DURING & AFTER THE MEETING

NOTE PROCESSING

Real-Time Note Support

"Summarize key statements, decisions, and tensions from these meeting notes."

Fact vs. Assumption Sort

"Separate confirmed facts, inferred assumptions, risks, and open questions from these notes."

Missed Question Scan

"What important questions were not asked given what we heard?"

FOLLOW-UP

Follow-Up Email

"Write a follow-up that summarizes what we discussed, confirms next steps, and keeps momentum. Direct and warm. No filler."

PROBLEM FRAMING & VALUE

FRAMING THE PROBLEM

Problem Framing Options

"Generate two or three ways to frame the core problem, each with different implications for how we position."

Value Translation

"Translate the customer's language into potential business impact—cost, time, risk, or opportunity."

Assumption Stress Test

"What must be true for this framing to hold? Where is the evidence weak or missing?"

BUILDING THE CASE

Role-Based Value Lens

"How would this problem and our solution be perceived by finance, operations, IT, and design?"

PROPOSALS & PRESENTATIONS

WRITING & STRUCTURING

Solution-to-Problem Alignment

"Map each element of this proposal to the specific problem and value it addresses. Flag anything that doesn't connect."

Executive Summary

"Write a one-paragraph executive summary of this proposal for a time-pressed C-suite reader."

Clarity & Credibility Scan

"Flag vague claims, jargon, or promises that lack evidence."

STRESS TESTING

Role-Based Narrative Test

"How would this proposal land with a CFO, operations leader, IT leader, and procurement? What would each push back on?"

PIPELINE & DEAL MANAGEMENT

DEAL HEALTH

Buying Signal Check

"Based on meeting notes and emails, what signals suggest real commitment versus polite interest?"

Risk Heatmap

"Where are assumptions still unvalidated across budget, authority, timing, and priority?"

Deal Drift Indicator

"Compare this deal's current signals to deals that stalled at a similar stage. Where does risk appear?"

PIPELINE REVIEWS

Pipeline Interrogator

"Review this pipeline data. Find the three biggest red flags. Which deals are most at risk and why?"

CLOSING & LEARNING

CLOSE SUPPORT

Stakeholder Gap Scan

"Which roles or perspectives appear underrepresented or missing in this buying process?"

Final Objection Map

"What could still slow or stop this deal? For each risk, what's the best response?"

Decision Criteria Audit

"What criteria is this customer using to decide? Where do we score best and worst?"

WIN/LOSS & LEARNING

Win/Loss Summary

"Summarize why this deal was won or lost using notes, emails, and key decisions."

EVERYDAY SELLING TASKS

EMAIL & OUTREACH

Cold Outreach

"Write a three-sentence outreach to [Name/Role] at [Company]. Lead with something specific to them. No generic openers."

Ghosted Client Nudge

"Write a short follow-up to a client who's gone quiet. Warm but direct. No guilt trips."

Internal Update

"Turn these bullets into a clean deal update for my manager. What we know, where we are, what we need."

CONTENT & DATA

Talk Track Builder

"Build a 60-second talk track for [solution] aimed at [role]. Lead with the problem, not the product."