

Sustainable Change in Sales and Marketing with AI

René Groeneveld
Kyriacos Fyrrillas
Michelle Drehsen



Your BTS Speakers today

From our BTS Sales and Marketing Practice



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Matter Expert, BTS

AI in Sales and Marketing: Q4 Event Series

Practical application and measurable impact

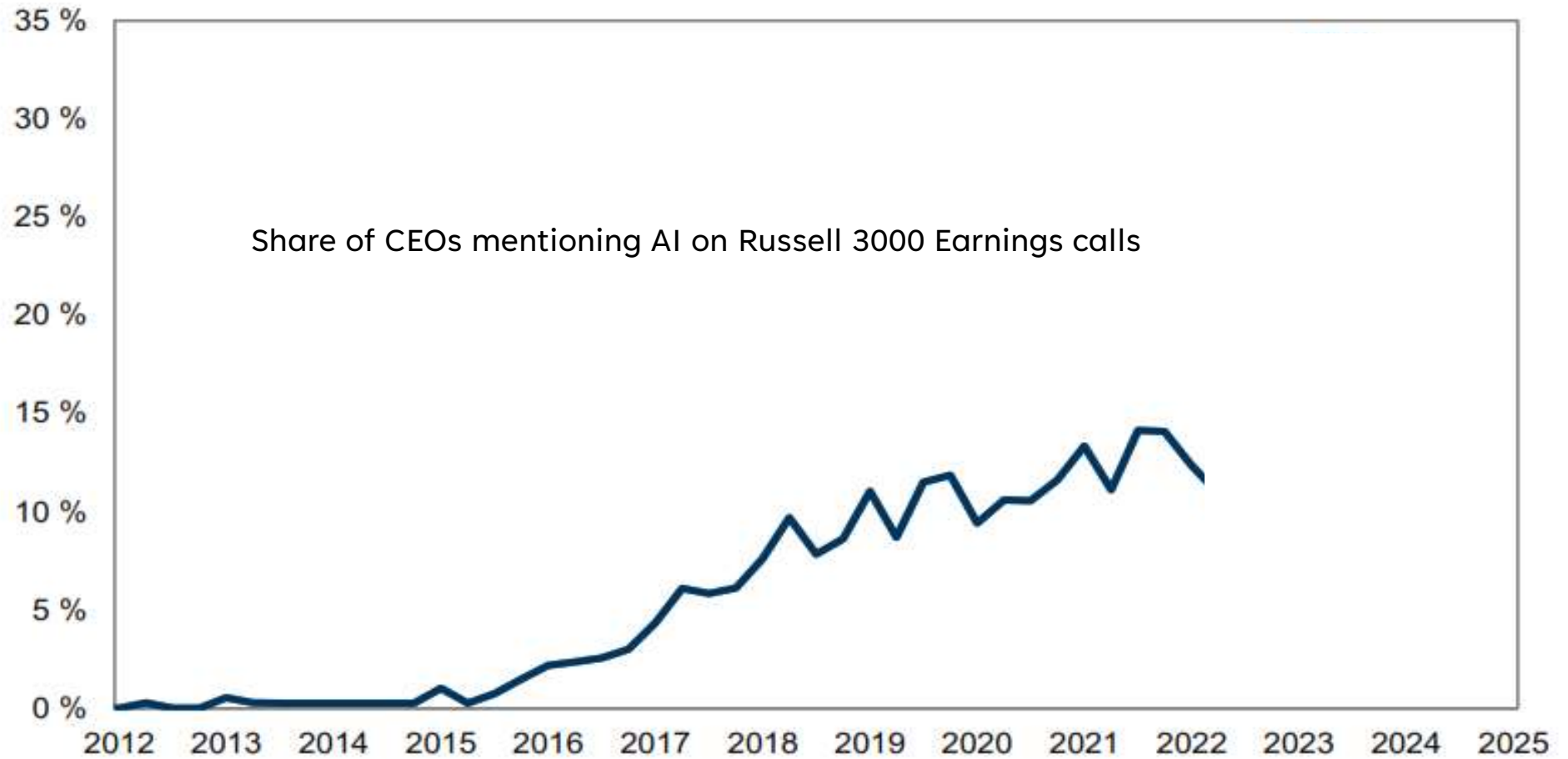
- **Sales Coaching and AI** (Nov 13)
 - WHY Sales Coaching: why sales managers have to rethink their role
 - WHAT needs to be done: the Sales Coaching Process and how AI can support
 - HOW to create sustainable change: example of engaging journeys using AI and conversational analysis
- **Collaborative Negotiations and AI** (Nov 21)
 - WHY Collaborative Negotiations
 - WHAT GREAT Collaborative Negotiations look like
 - HOW to master the tactical aspects of a Collaborative Negotiation
- **Sustainable Change with AI** (today)
 - WHY change in sales and marketing often fails
 - WHAT GREAT sustainable change looks like
 - HOW to create sustainable change with AI



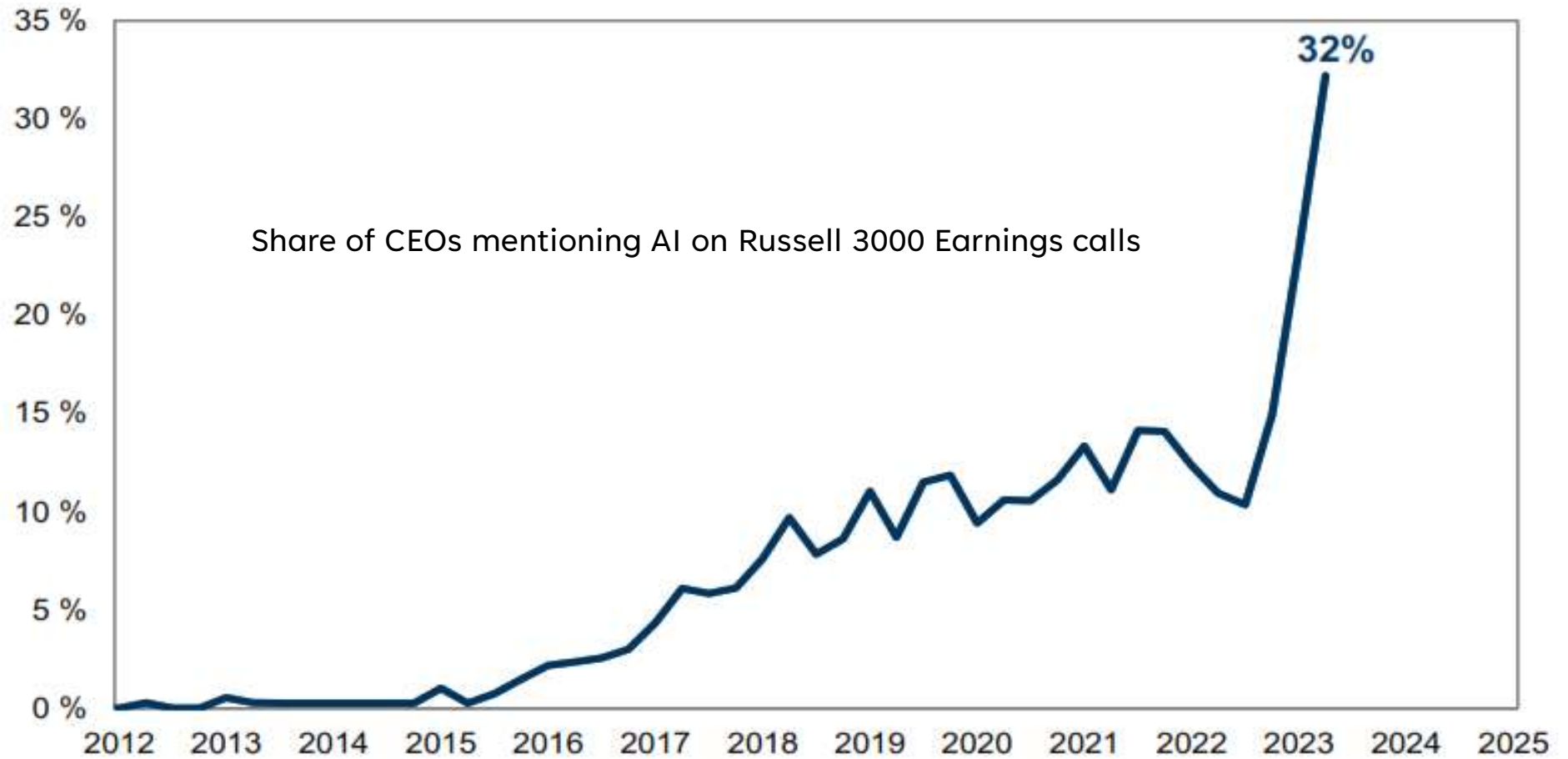
What we are exploring today

1. AI Opportunities in Sales and Marketing
2. AI along the customer journey
3. AI as a Co-worker
4. Showcase: Practicing with AI

CEOs talking about AI...

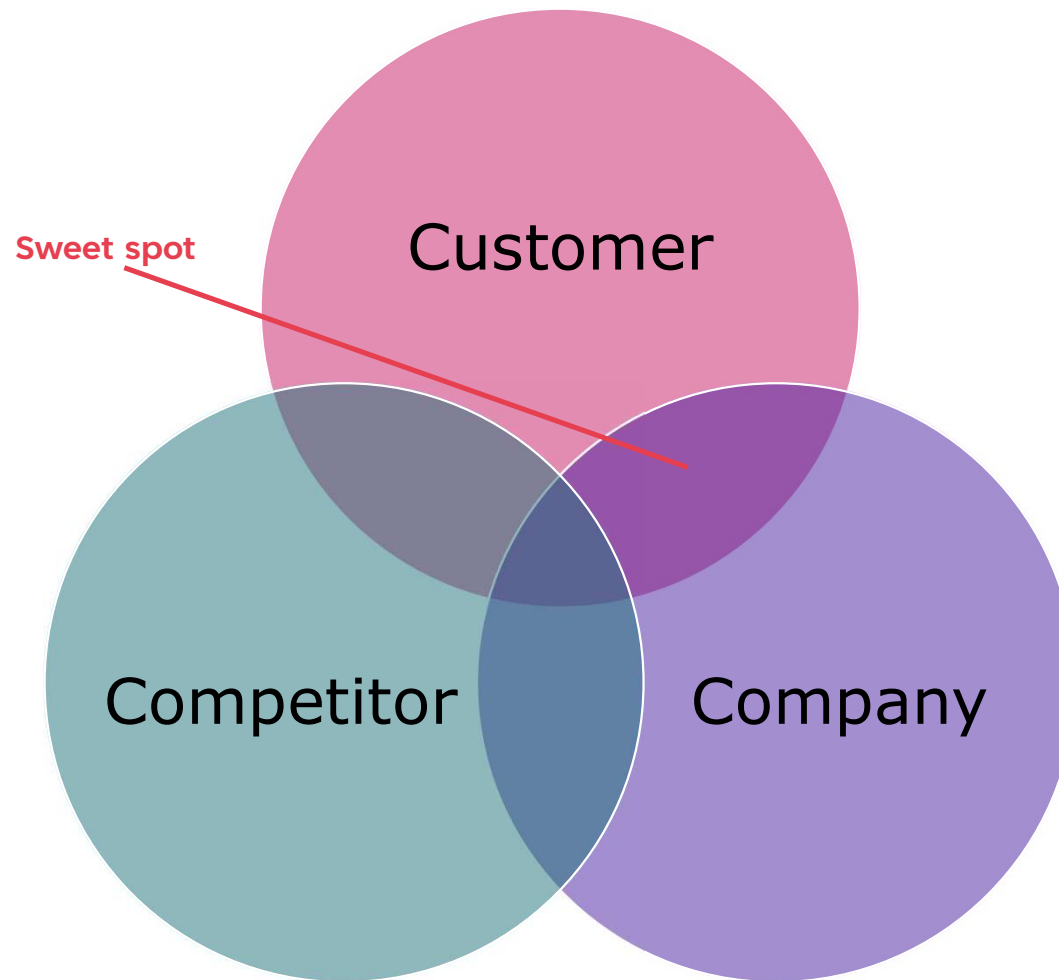


CEOs talking about AI...

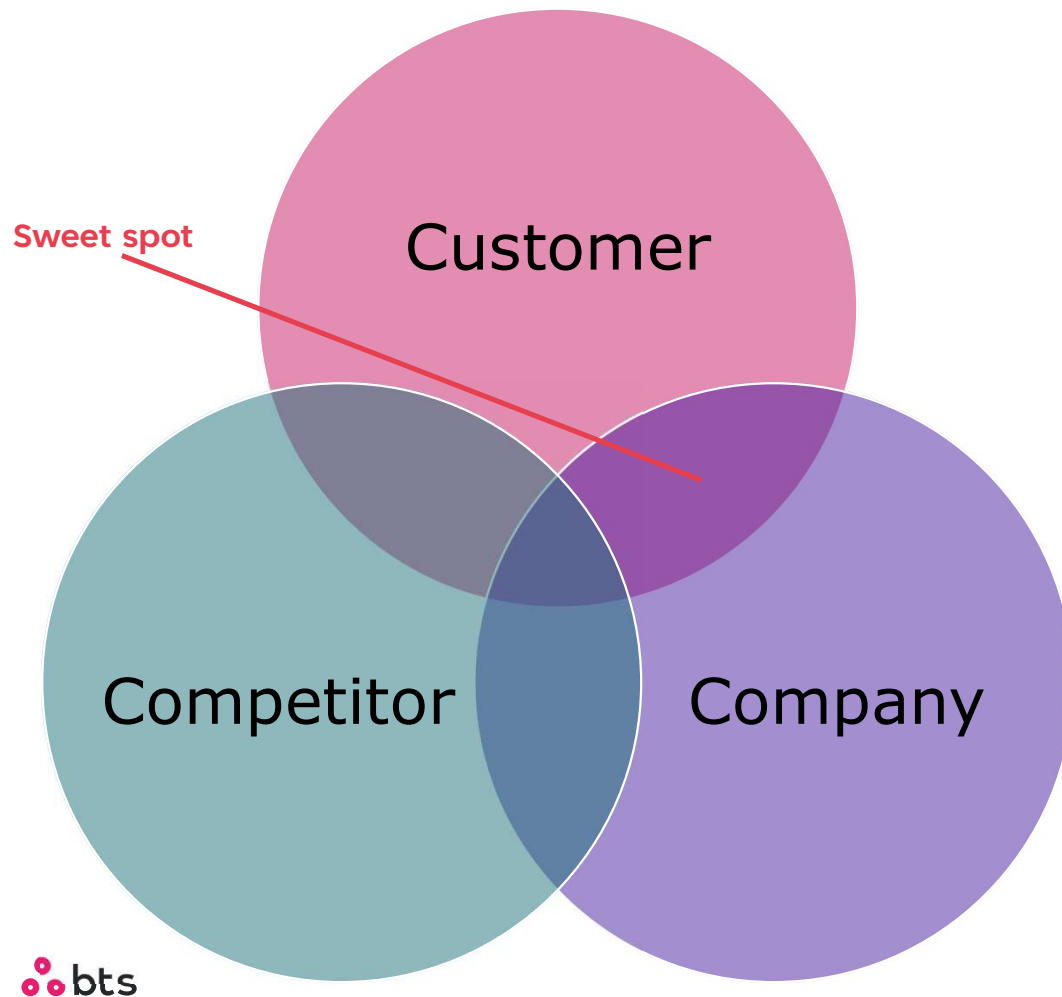


What does using AI mean for your Commercial Organizations?

3 C Analysis – How to leverage AI to find the sweet spot



3 C Analysis – How to leverage AI to find the sweet spot



3 Perspectives based on 3 C-Analysis:

1. How can we make the client experience more efficient, better, successful?
2. How can we make our own methodology and processes more efficient, better, successful? (AI as a co-worker)
3. How do we differentiate (from our competition)?

AI Opportunities in Marketing & Sales



Some Selected Company Examples

Personalization

- Example: Company's own AI algorithms
- Case: Netflix and Amazon



Customer Segmentation

- Example: HubSpot's AI-driven customer segmentation
- Case: Spotify



Price Optimization

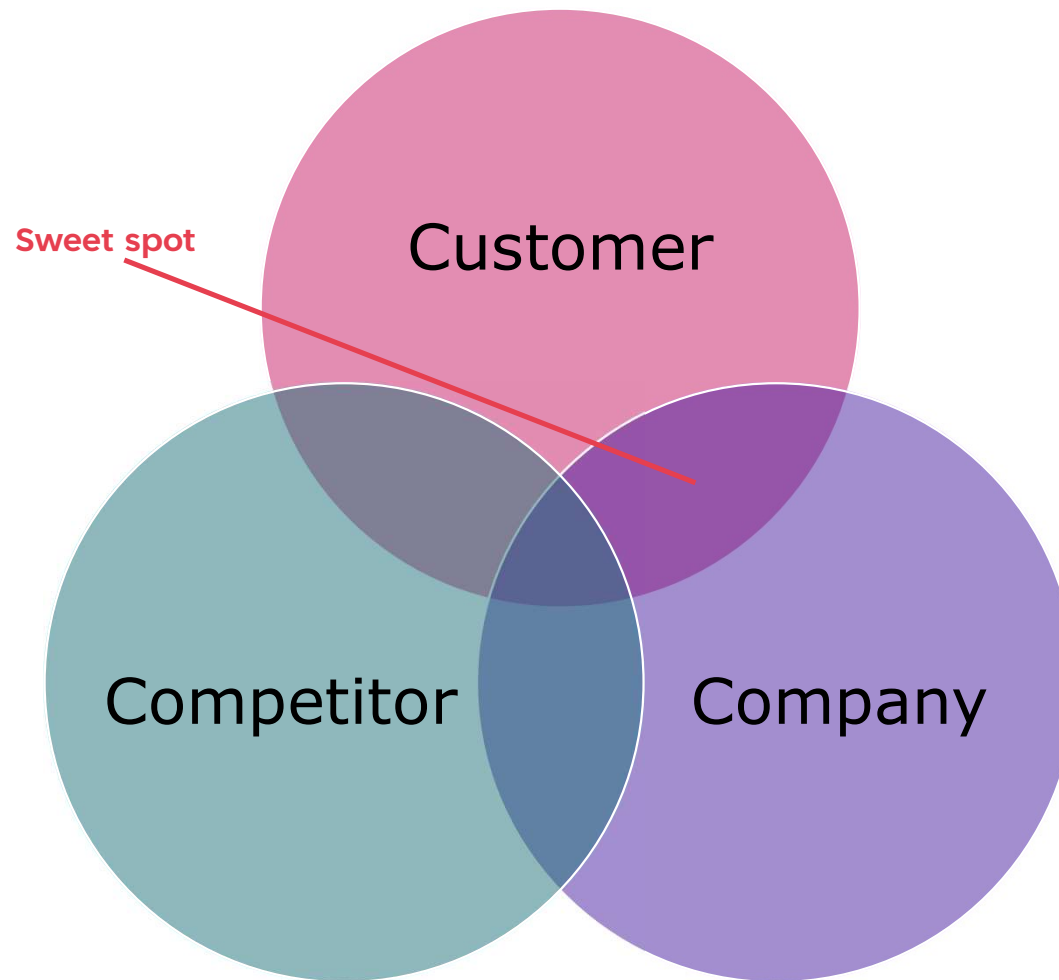
- Example: Dynamic pricing platforms like Perfect Price
- Case: Airlines like Delta and United



How would you rate your current level of integration of AI in your Organization?

AI along the Customer Journey

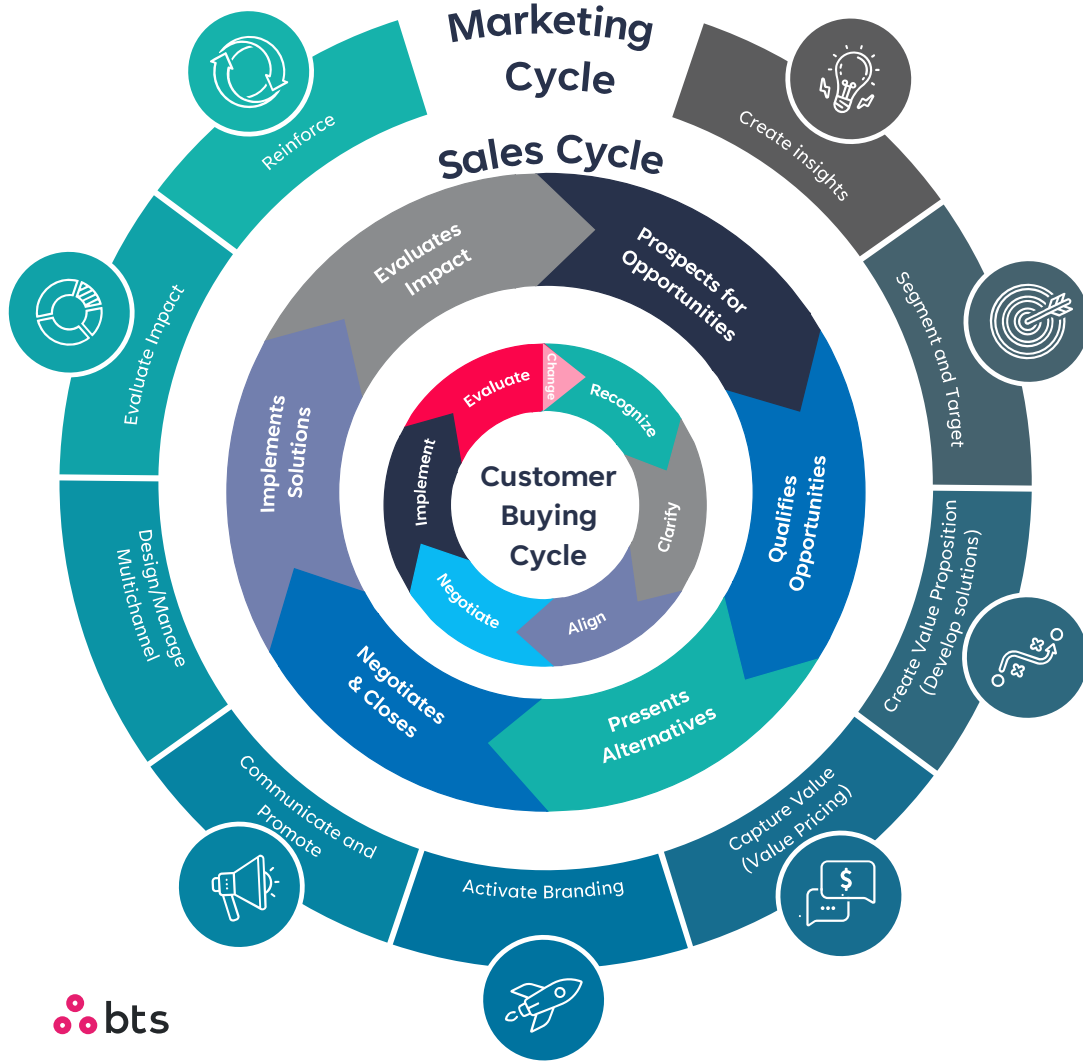
3 C Analysis – How to leverage AI to find the sweet spot



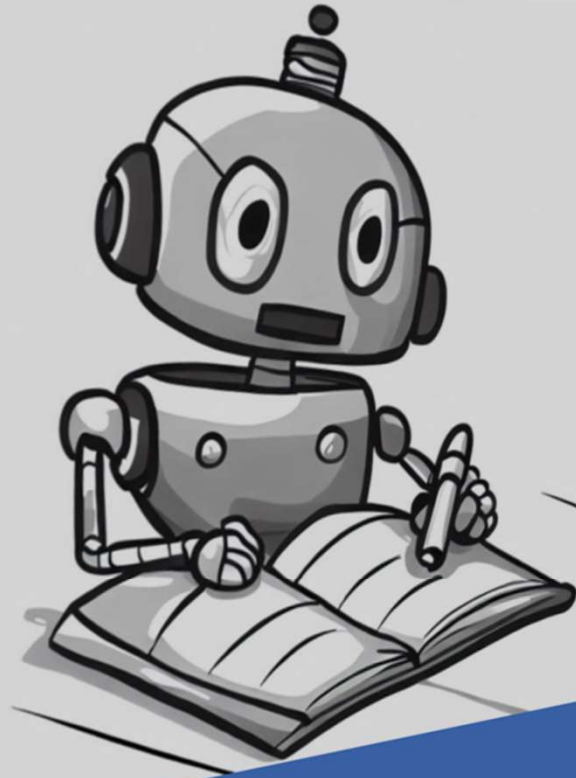
Customer, Sales and Marketing Journey



Identify the key opportunities for AI in sales, marketing and customer service



How can we make the client experience more efficient, better, successful?



Becoming an AI Co-Worker

The BTS Guide to using ChatGPT to Enhance Your Productivity and Creativity at work

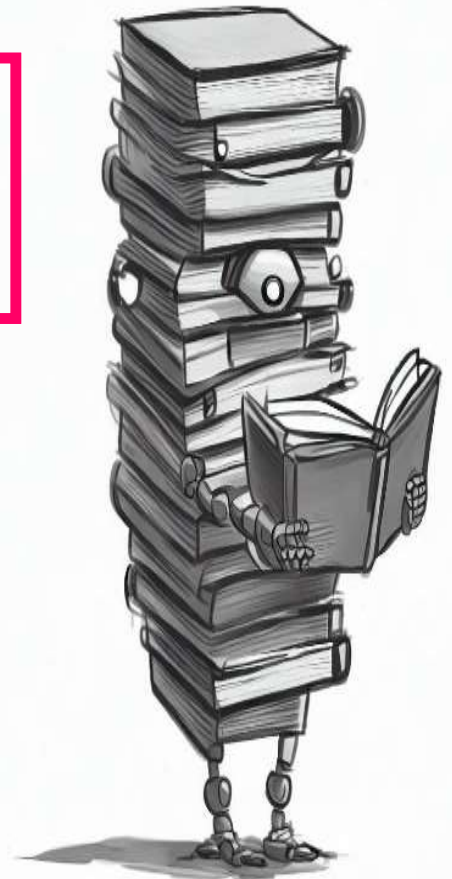
Say hello to your AI Coworker

1. I am a “next word predictor.”
2. I am VERY **well read**, but very **inexperienced** new hire (and I sometimes make stuff up)
3. I try to **predict** the next word you want based on what you ask me!



Three principles for working with AI

- 1) Write clear prompts w/ RIC
 - (Rules, Instructions, Context)
- 2) Give your AI Time to Think
- 3) Experiment and iterate

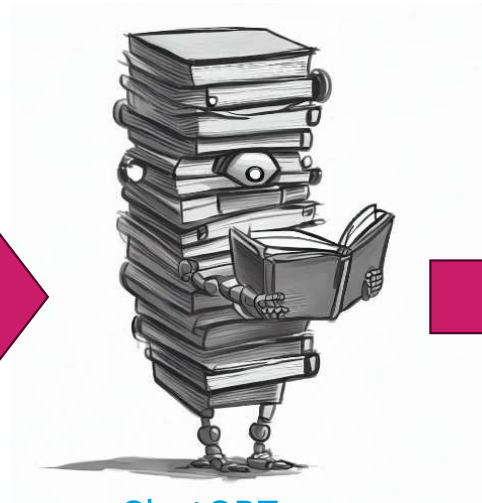


Prompts and Completions

Prompt

Good morning! How are you?

Model



ChatGPT

Um...that
was
awkward

Completion

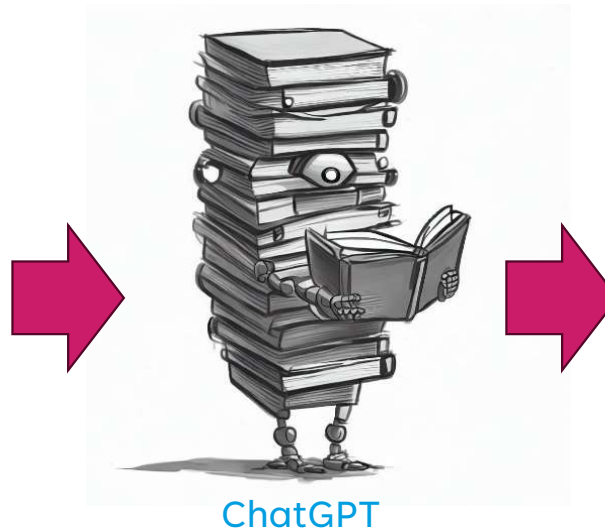
Good Morning! As an AI model, I don't experience emotions, but I'm here to help.

Prompts and Completions w RIC

Prompt

Act as bio-engineer. You will help me design an innovative new packaging solution. Generate a list of 5 innovative packaging ideas, focusing on sustainability and cost-effectiveness. Each idea should be radically different from the other. Are you ready?

Model



Completion

- Overview:** Smart containers with RFID/NFC tags for monitoring and reuse.
- **Sustainability:** Reduces single-use packaging.
 - **Cost:** Initial high cost but saves money over time.
5. **Localized Material Sourcing**
- **Overview:** Use local, sustainable materials for packaging to reduce transportation emissions.
 - **Sustainability:** Lowers carbon footprint.
 - **Cost:** Lowers transportation and import costs.
6. **Water-Soluble Plastics**
- **Overview:** Use of plastics that dissolve in water, leaving no residues.
 - **Sustainability:** Reduces landfill waste.
 - **Cost:** Material cost could be higher but saves on waste management.
7. **Nano-Coated Paper**
- **Overview:** A paper treated with a sustainable nano-coating to provide water and oxygen barriers.
 - **Sustainability:** Biodegradable and sourced from sustainable forests.
 - **Cost:** Cost-effective due to paper's low base cost.
8. **Smart Labels for Freshness**
- **Overview:** Incorporate smart labels that change color based on product freshness.
 - **Sustainability:** Reduces food waste.
 - **Cost:** Minimal cost increase but reduces waste management costs.
9. **3D Printed Custom Packaging**
- **Overview:** On-site 3D printing of packaging to fit specific product dimensions.
 - **Sustainability:** Reduces material waste.

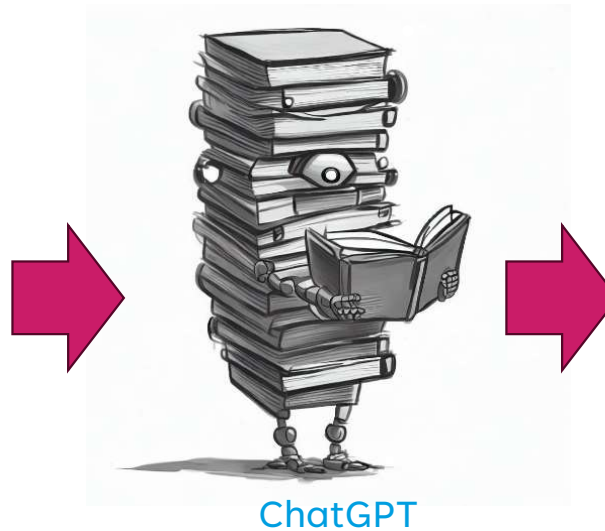
Prompts and Completions w RIC

Okay! I hear you!

Prompt

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 - (**R**ules, **I**nstructions, **C**ontext)
- 2) Give your AI Time to Think
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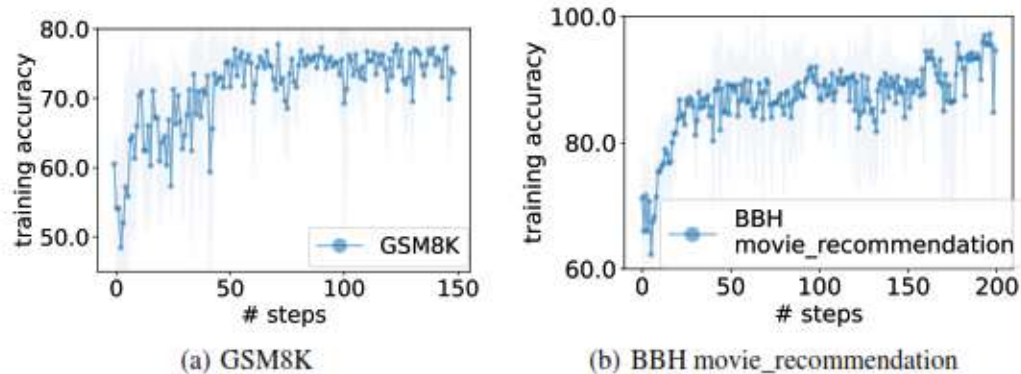


Figure 1: Prompt optimization on GSM8K (Cobbe et al., 2021) and BBH (Suzgun et al., 2022) movie_recommendation. The optimization on GSM8K has pre-trained PaLM 2-L as the scorer and the instruction-tuned PaLM 2-L (denoted PaLM 2-L-IT) as the optimizer; the optimization on BBH movie_recommendation has text-bison as the scorer and PaLM 2-L-IT as the optimizer. See Section 5 for more details on experimental setup.

Table 1: Top instructions with the highest GSM8K zero-shot test accuracies from prompt optimization with different optimizer LLMs. All results use the pre-trained PaLM 2-L as the scorer.

Source	Instruction	Acc
<i>Baselines</i>		
(Kojima et al., 2022)	Let's think step by step.	71.8
(Zhou et al., 2022b)	Let's work this out in a step by step way to be sure we have the right answer. (empty string)	58.8 34.0
<i>Ours</i>		
PaLM 2-L-IT	Take a deep breath and work on this problem step-by-step.	80.2
PaLM 2-L	Break this down.	79.9
gpt-3.5-turbo	A little bit of arithmetic and a logical approach will help us quickly arrive at the solution to this problem.	78.5
gpt-4	Let's combine our numerical command and clear thinking to quickly and accurately decipher the answer.	74.5

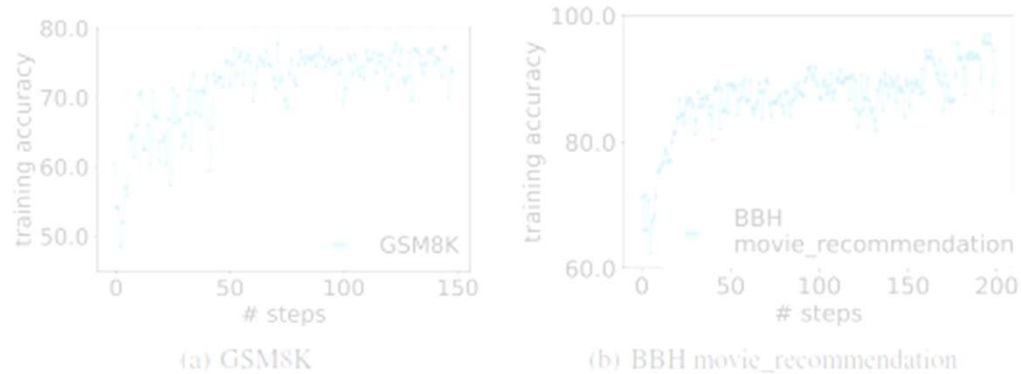


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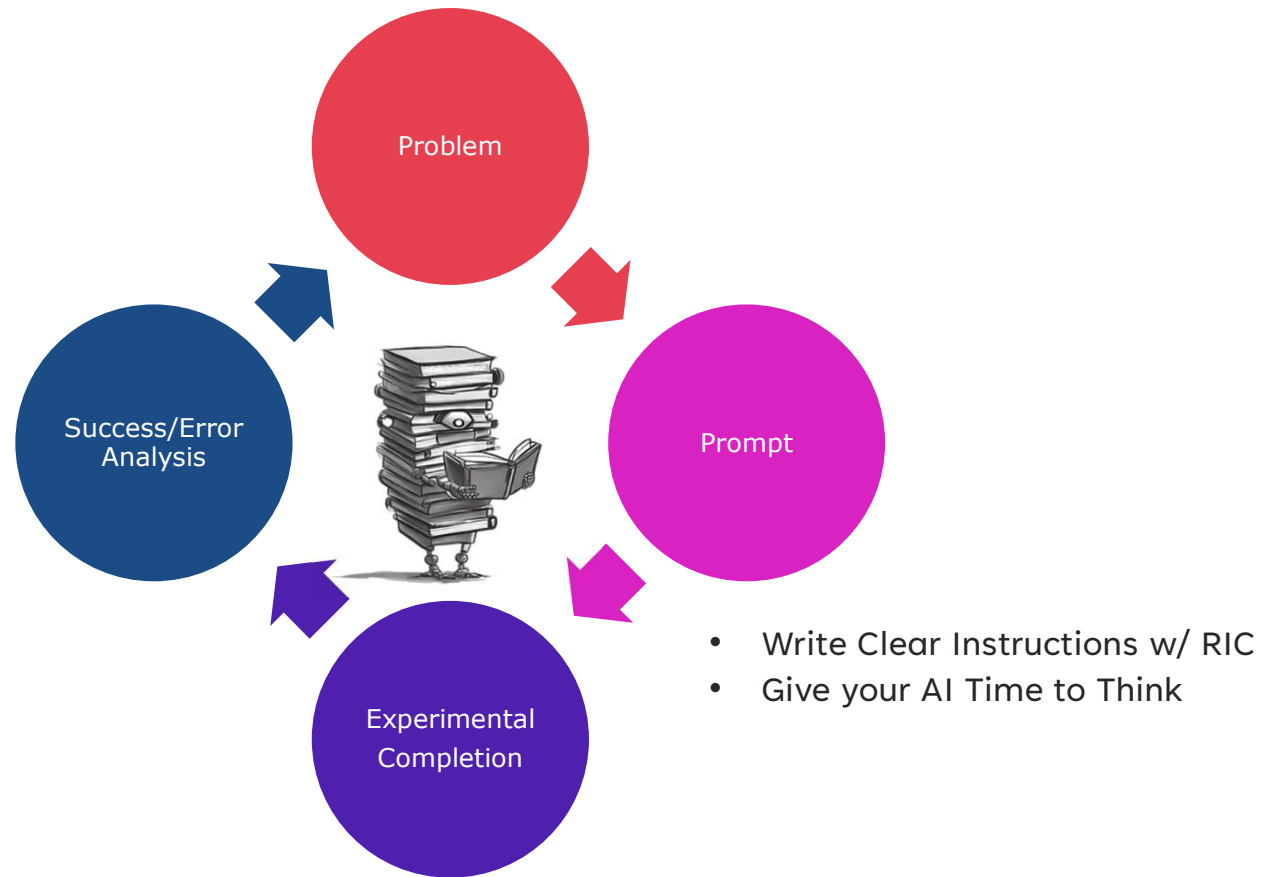
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Take a deep breath and work on this problem step-by-step

Three principles for working with AI

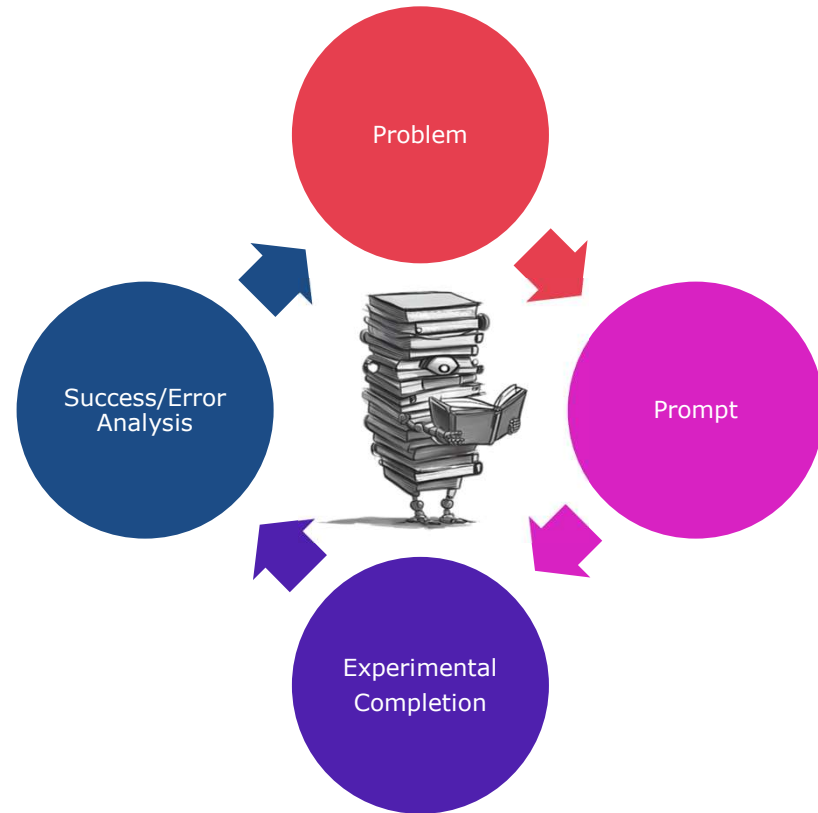
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Experiment and Iterate with your AI Coworker



Experiment and Iterate with your AI Coworker

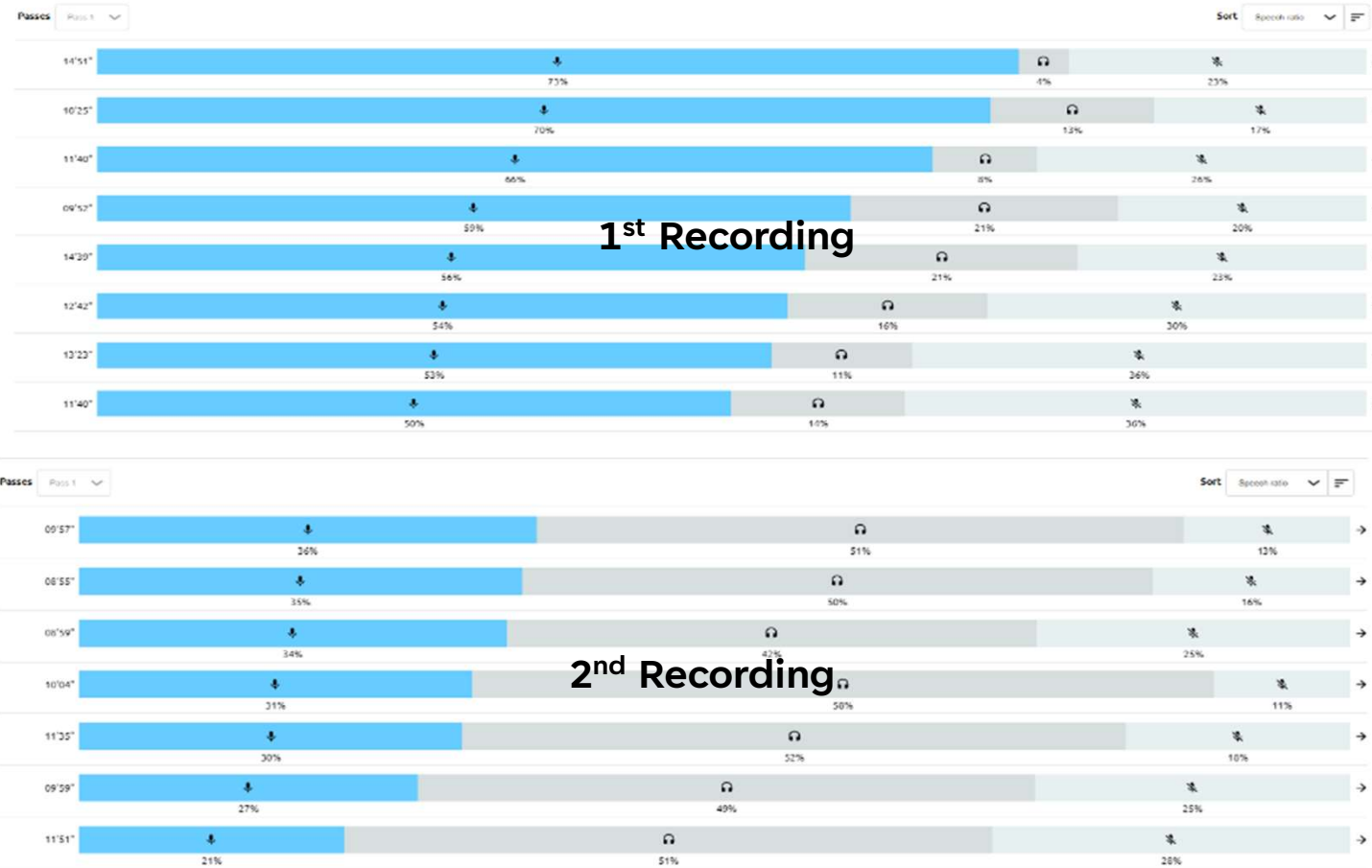
- 1) **Try** a prompt!
- 2) **Analyze** where the completion doesn't give you what you wanted
- 3) **Provide clearer RIC** and/or **give more time to think**
- 4) **Refine** your prompt with many examples
- 5) **Repeat** until satisfied!



Showcase: Practicing with AI

Measuring Behavioral Change

The blue bars represent the talking time of the salespersons during a discovery conversation *graphs based on real data*



Salespersons changed behaviours in the 2nd recordings by **talking less** during their discovery conversations and **listening more**.

Change happened after participants realized their impact in the 1st recordings.

Sebastian Shah...
Seller

Rafael San Martin
Client

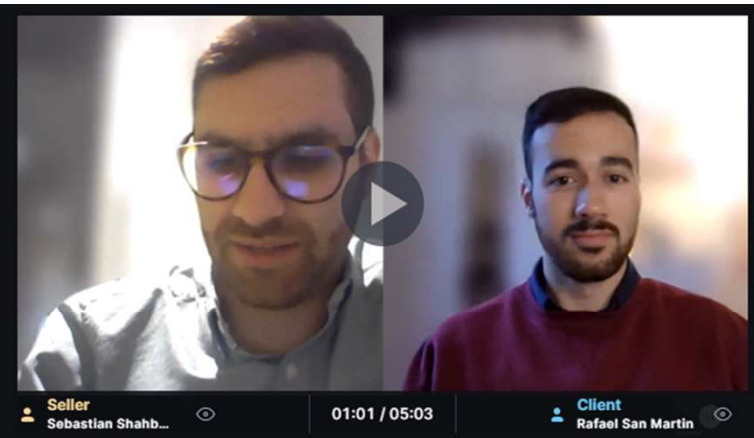
PASSES **1**

Hour Mar 2, 2022, 11:36:44 AM

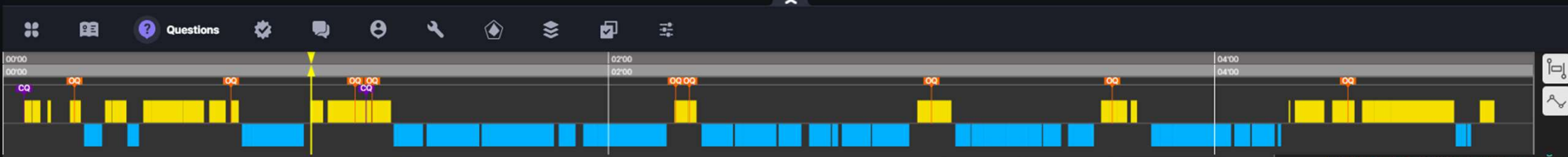
Type Sales

Topic Need discovering

Company



Yellow and blue lines below show the different speakers. The video on the right allows players to see body language as the conversation gets replayed.



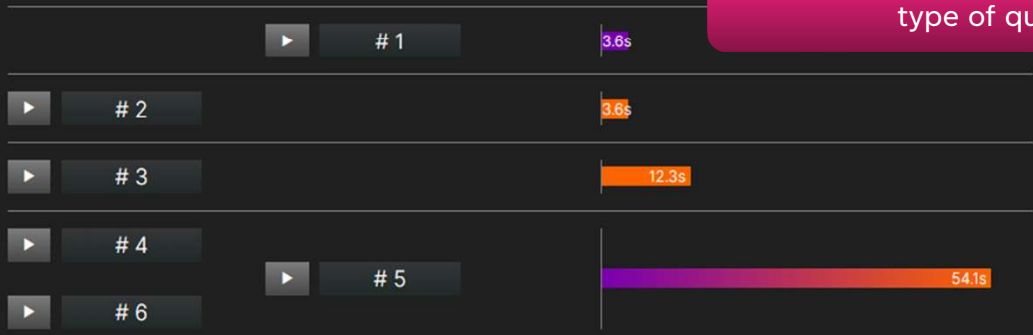
Questioning phase

THEORY PRACTICE TRANSCRIPT

Open-ended **9**
Response time (Average : 19 seconds)

Closed-ended **2**
Response time (Average : 29 seconds)

Total amount of listening/speaking time, type, and number and type of questions are analyzed objectively



that the leaders are facing when executing these new brand strategy

- Brilliant then let's
- Have a quick start then in terms of going broad and thinking about what results do you want to achieve
- Can you share a little bit
- What are the results you're hoping to achieve with this program
 - Yes of course
 - So the experience is aimed at partners as senior partners
 - We are now launching a new branch strategy based on our new branch pillars that sound very well you know crime centricity and global alignment and seamless and globally
 - Around execution techniques however the partners feel that they they are a bit reticent to change because they see this as just one
 - Another more consulting jargon is coming in having them
 - Do things different than things that they think work in
 - They're always they're very traditional so yeah we're not trying to have all partners

Sebastian Shah... Seller Rafael San Martin Client

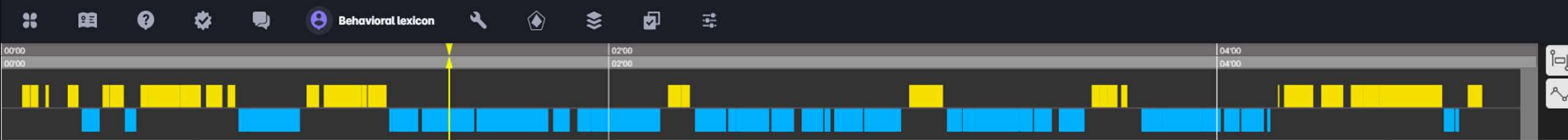
PASSES 1

Hour: Mar 2, 2022, 11:36:44 AM

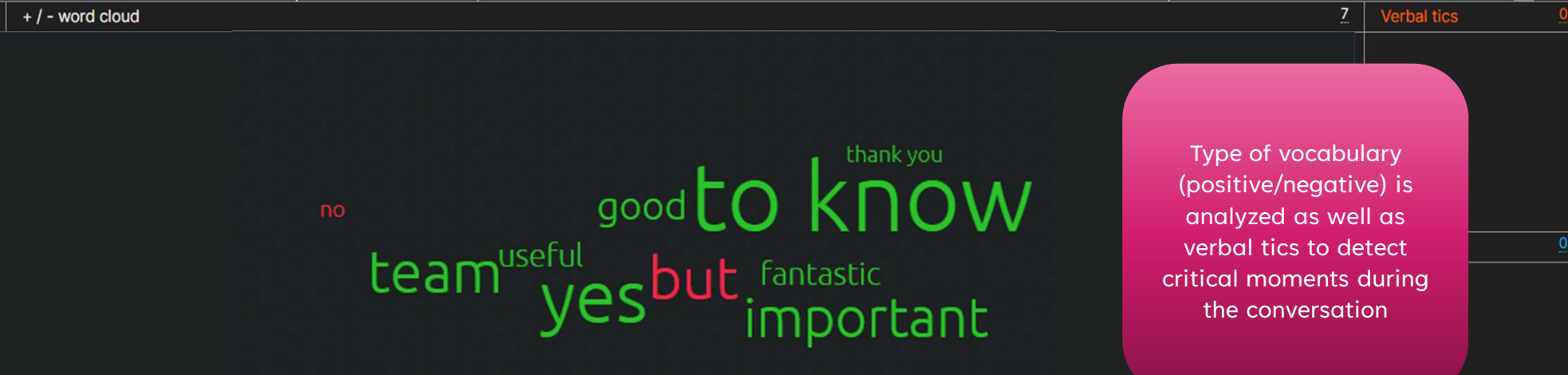
Type: Sales

Topic: Need discovering

Company: DEMO / TEST



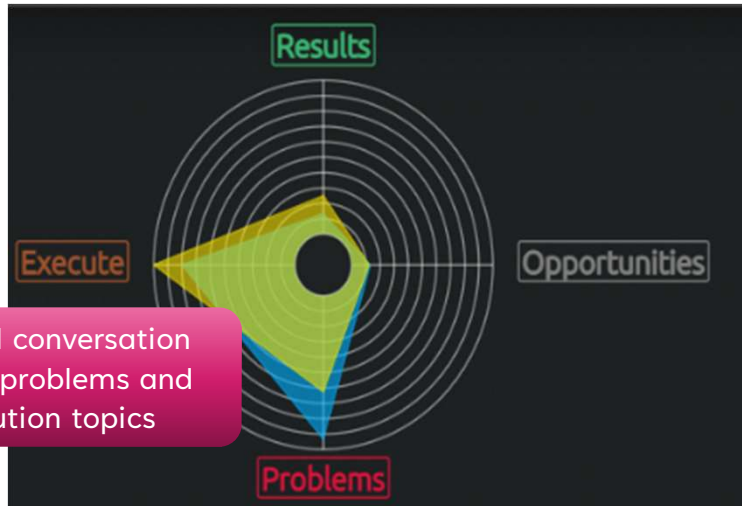
+ Word	
To know	18
Yes	11
Team	7
Important	6
Good	3
Fantastic	2
Useful	2
Thank you	1
- Word	
But	
No	



Type of vocabulary (positive/negative) is analyzed as well as verbal tics to detect critical moments during the conversation

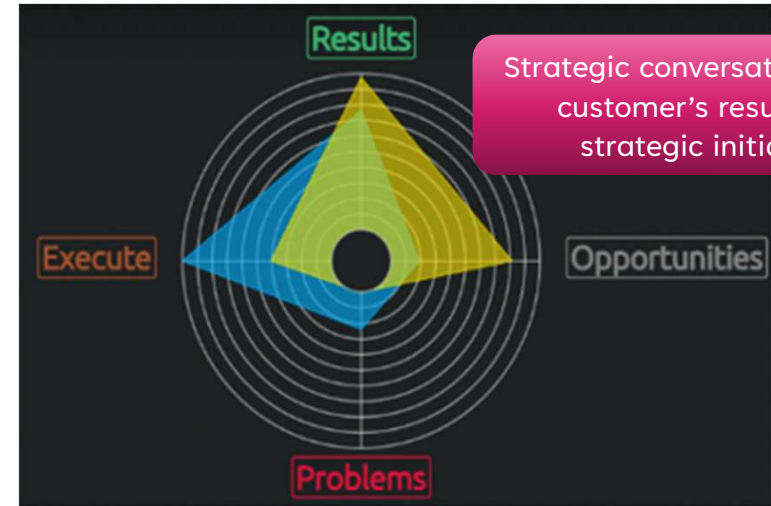
Measuring Behavioral Change

1st Recording



Tactical conversation around problems and execution topics

2nd Recording



Strategic conversation around customer's results and strategic initiatives

The salesperson improved the strategic relevance of the sales conversation from one recording to the other:

- Less Problem and Execution topics (Problems – Execute)
- More time spend on uncovering customer's Results and Strategic Initiatives (Results – Opportunities)

Sebastian Shah... Seller Rafael San Martin Client

PASSES 1

Hour: Mar 2, 2022, 11:36:44 AM

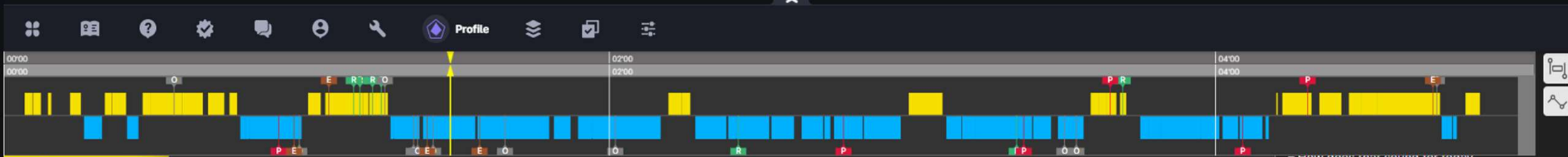
Type: Sales

Topic: Need discovering

Company: DEMO / TEST

Seller: Sebastian Shahb... 01:28 / 05:03

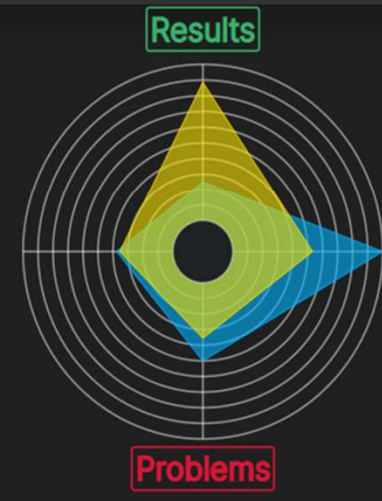
Client: Rafael San Martin



- SELLER**
- Achieve 3
 - Result 2
 - Opportunity 1
 - Program 1
 - Strategic 1
 - Barrier 1
 - Challenge 1
 - Execute 1
 - Start 1
- CLIENT**
- Partner 5
 - Strategic 5
 - Challenge 3
 - Revenue 2
 - Execute 2
 - Retention 1
 - Launch 1

Profile GROW ROPE SONCAS

List of keywords found along the defined model



Spider graphs capture elements of the conversation along the model's axis (ROPE)

TRANSCRIPT

- How does that sound for today

- That that is perfect
- That is exactly it
- I wanted to have a little bit more of a conversation and see where pts can help and talk a little bit about the **Challenges** that the leaders are facing when **executing** these new brand **strategy**
- Brilliant then let's
- Have a quick **start** then in terms of going broad and thinking about what **results** do you want to **achieve**
- Can you share a little bit
- What are the **results** you're hoping to **achieve** with this **program**
- Yes of course
- So the experience is aimed at **partners** as senior **partners**
- We are now **launching** a new branch **strategy** based on our new branch **pillars** that sound very well you know crime centricity and global alignment and seamless and globally
- Around **execution** techniques however the **partners** feel that they they are a bit reticent to change because they see this as just one

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Seller

Rafael San Martin
Client



Seller
Sebastian Shahb...

01:28 / 05:03

Client
Rafael San Martin

PASSES

1

Hour Mar 2, 2022, 11:36:44 AM

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Company DEMO / TEST

Pitching

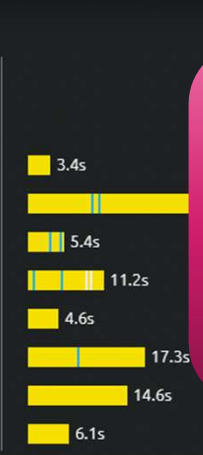


Presentation

THEORY PRACTICE TRANSCRIPT

Client	Need	Objection	Question
	34	0	4
	1		
	13		
	1		1

Seller	Feature	Advantage	Benefit
	4	0	9
	1		2
	2		2
			1



Tool analyzes if the salesperson addressed customer's benefits and if he presented the Benefits-Advantages-Features in the right order

- Yes now i do ok i started the recording ok i well i thought you wanted to ask me to three questions right

- Ok

- Yeah very good

- OK

- Oh good

- Ok good thanks giddy up as for taking the time for this we actually would like to understand a little bit better your current situation and the future outcomes that you want to achieve

- Yep

- Actually my first question is you know we leave quite the changing times and this whole pandemic changed a lot of the landscape for most of the head of sales

- So within a time frame of 6 to 12 months

Tool analyzes number of customer's objections and needs expressed



■ Doris Vega ■ Kelly Fletcher

Interview: Job interview
BTS

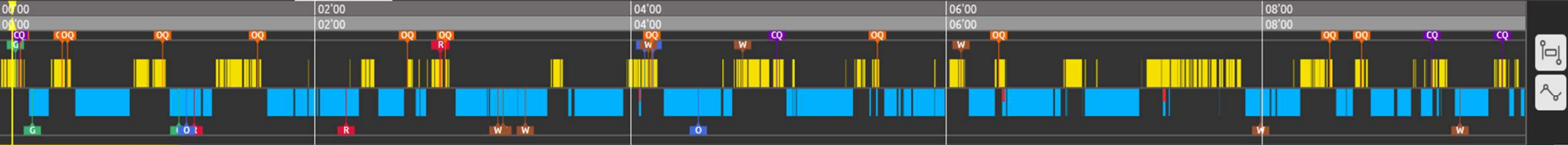
Recording

n² - 1/13/2021 at 2:06 PM



00:05 / 09:40

⌵ Profile ✓



RECRUITER	
Time	3
Options	2
Goal	1
Current	1
Reality	1

Profile **GROW** ROPE SONCAS

Relative / profile words

TRANSCRIPT

CANDIDATE	
Time	5
Goal	2
Reality	2
Options	1
To move towards	1

List of keywords found along the GROW model



Spider graphs capture elements of the conversation along the model's axis (GROW)

- Hi kelly
 - Thank you for being here
 - As we discussed **before**
 - We are going to talk about the **goal** you
 - To achieve
 - **Do you** want to **tell me**
 - What
 - It about
 - Yeah absolutely my **goal** at the moment is to focus more on meditation and mindfulness that can impact network
 - Uh huh ok and when you say to focus more meditation **what would** that be well **what do you want** with chief
 - I would like to achieve a better work life balance i would like to be more

Welcome to

Sales Leader: Olivia

"Hello there! 🙌 Are you eager to supercharge your sales performance and unlock the secrets to success? 🚀 Today, we're excited to introduce you to our Sales Discovery Conversation, a powerful tool designed to help you identify your customers' needs and deliver tailored solutions that will leave them coming back for more!

You are talking to Olivia Adler, Sales Leader at RelateFinance, which is a multinational financial service company.

This discovery conversation will guide you through Challenges 🧩, uncovering her Goals 🎯, and Don't miss this chance to elevate your sales performance with your customers. Let's get started right now on the foundation for becoming a trusted advisor.

An AI generated avatar introduces the conversation and open the dialog with the chatbot

[Start your Role Play](#)

Meet Olivia Adler



Please start your Discovery role play with Olivia!
Just click on the chatbot icon

Welcome to

Discovery Conversation

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[Start your Role Play](#)

User asks questions and the Chatbot answers according to the role he has been asked to play

Please start your Discovery ROLE
Just click on the chat

The screenshot shows a chatbot interface with a dark theme. At the top right, there are window control icons (minimize, maximize, close). The chat history includes:

- Kyriacos:** Let's begin and please go ahead with your first question.
- User:** Hello John, what are the results you want to achieve this year?
- Kyriacos:** Hello, nice to meet you. This year, our main goals are to achieve a global ROCE across all manufacturing plants, maintain an average production yield of all fabs above 90%, and reach our end-of-year production target at the global level. Time is of the essence, so let's keep the conversation focused.
- User:** What strategic initiatives did you put in place to achieve your results?
- Kyriacos:** We have several strategic initiatives in place to help us achieve our goals. These include opening new fabs with the support of key global reliable suppliers, implementing a worldwide quality program and industrial safety initiative, increasing our worldwide gross margin, and developing value co-creation and strategic development programs with key customers and suppliers. Let's keep the conversation moving, as I have a tight schedule.
- User:** What are the main challenges you see on the way to achieving your results?

At the bottom, there is a text input field with the placeholder "Type your message...", a microphone icon, and a "Clear" button. Below the input field, a note reads: "If you want to terminate the current conversation: 1) click on the 'CLEAR' button 2) or write 'please evaluate my conversation and give me a feedback'"



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[Start your Role Play](#)

Please select your Discovery ROLE
Just click on the character

At any time, on User's request, feedback can be provided on the quality of the questions asked based on a predefined and configurable model



Kyriacos /evaluate-detailed-feedback/

🙌 Here's the detailed evaluation of the questions asked during the role play:

- "What are the results you want to achieve this year?"
Rating: 7/10
Criteria:
 - Open-ended: Yes
 - Relevant: Yes
 - Thought-provoking: Yes
 - Aligned with customer's priorities: Yes
 - Uncovers a problem: No
 - Uncovers an opportunity: Yes
 - Uncovers a decision-making process: No
- "What strategic initiatives did you put in place to achieve your results?"
Rating: 8/10
Criteria:
 - Open-ended: Yes
 - Relevant: Yes
 - Thought-provoking: Yes
 - Aligned with customer's priorities: Yes

Type your message... [Clear](#)

If you want to terminate the current conversation: 1) click on the "CLEAR" button 2) or write "please evaluate my conversation and give me a feedback"

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[Start your Role Play](#)

At the end, on User's request, feedback is provided on how well the questioning framework (ROPE) has been applied. Chatbot provides hints on what could have been done better as well.

- Relevant: Yes
- Thought-provoking: No
- Aligned with customer's priorities: Yes
- Uncovers a problem: No
- Uncovers an opportunity: No
- Uncovers a decision-making process: Yes

Average rating: 7.5/10

What could the salesperson have done better while asking these questions:

- Dive deeper into the specific problems and challenges faced by the company.
- Ask more questions related to the decision-making process and criteria for selecting suppliers.
- Explore the potential impact of solving the problems on the company's goals and initiatives.

ROPE Framework rating: 7/10

The salesperson did a good job uncovering information in the Results, Strategic Initiatives, and Problems categories. However, there was limited information uncovered in the Tactical Execution category. The salesperson could have asked more questions about the implementation of the initiatives, the decision-making process, and the criteria for selecting suppliers to improve the conversation's quality within the ROPE framework.

Type your message... Clear

If you want to terminate the current conversation: 1) click on the "CLEAR" button 2) or write "please evaluate my conversation and give me a feedback"



Welcome to

Discovery Conversation

"Hello there! 🙌 Are you eager to supercharge your sales performance and unlock the secrets to success? 🚀 Today, we're excited to introduce you to our Sales Discovery Conversation, a powerful tool designed to help you identify your customers' needs and deliver tailored solutions that will leave them coming back for more! This conversation will guide you through understanding your prospects' Challenges 📋, uncovering their Goals 🎯, recognizing their unique Decision-making process 🧠, and developing a compelling Solution 💡 tailored to their needs. Don't miss this chance to elevate your sales game and make a lasting impact on your customers. Let's get started right now, and together, we'll build the foundation for a thriving sales career! ⭐"

[Start your Role Play](#)

By using ChatGPT prompting, Users can enrich their experience by getting more feedback and hints from the Chatbot.

initiatives, the decision-making process, and the criteria for selecting suppliers to improve the conversation's quality within the ROPE framework.

Kyriacos How would you reformulate the question "What are the results you want to achieve this year?" to get a 10/10 rating?

👍 A reformulated question to achieve a 10/10 rating could be:

"Can you share your top priorities for this year, and how do they relate to the overall growth and success of Redchip Electronics, especially considering the challenges and opportunities in the semiconductor market?"

This question meets the criteria for a high-impact question:

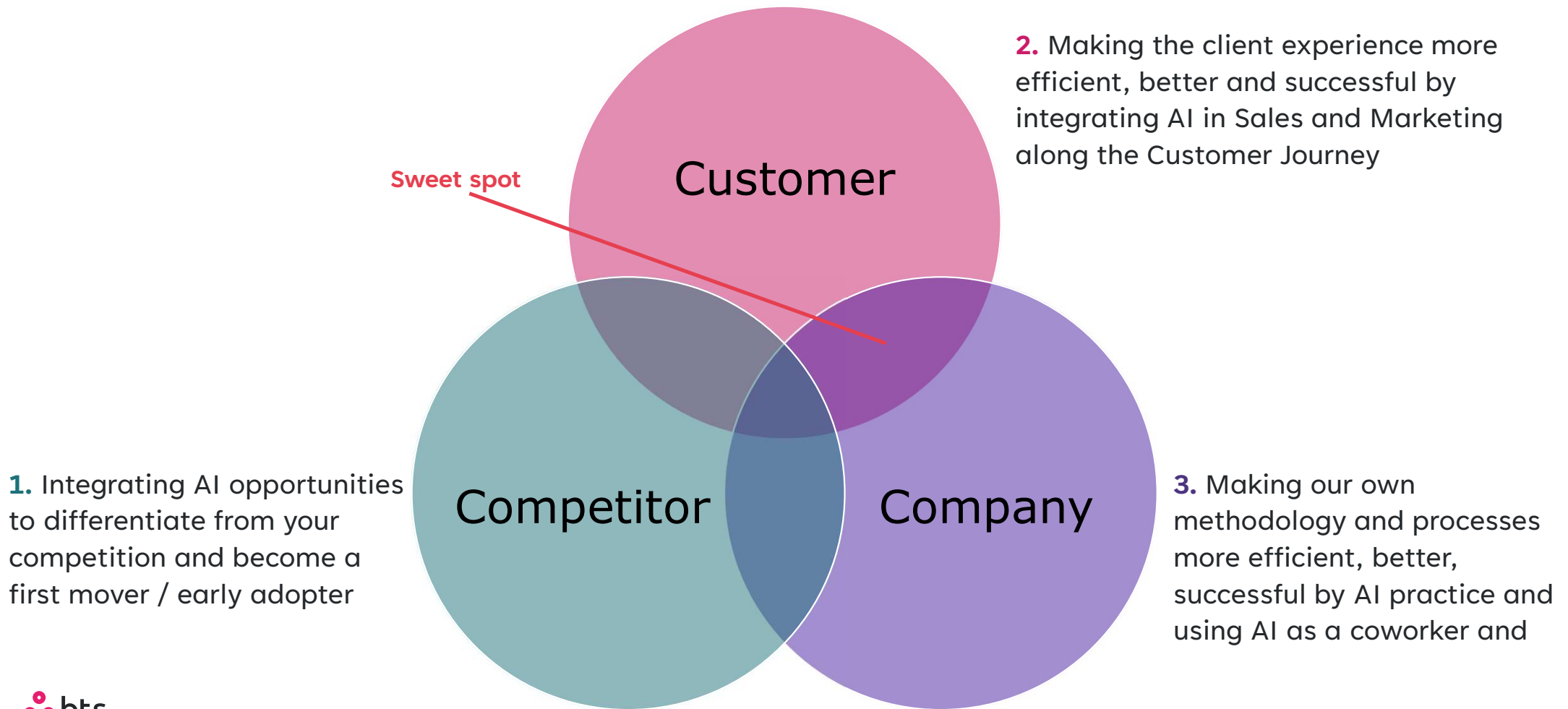
- Open-ended: Yes
- Relevant: Yes
- Thought-provoking: Yes
- Aligned with customer's priorities: Yes
- Uncovers a problem: Yes (by mentioning challenges)
- Uncovers an opportunity: Yes (by mentioning opportunities)
- Uncovers a decision-making process: Yes (by asking about priorities and their relation to growth and success)

Type your message... [Clear](#)

If you want to terminate the current conversation: 1) click on the "CLEAR" button 2) or write "please evaluate my conversation and give me a feedback"




Key Takeaways: Leverage AI to find the sweet spot



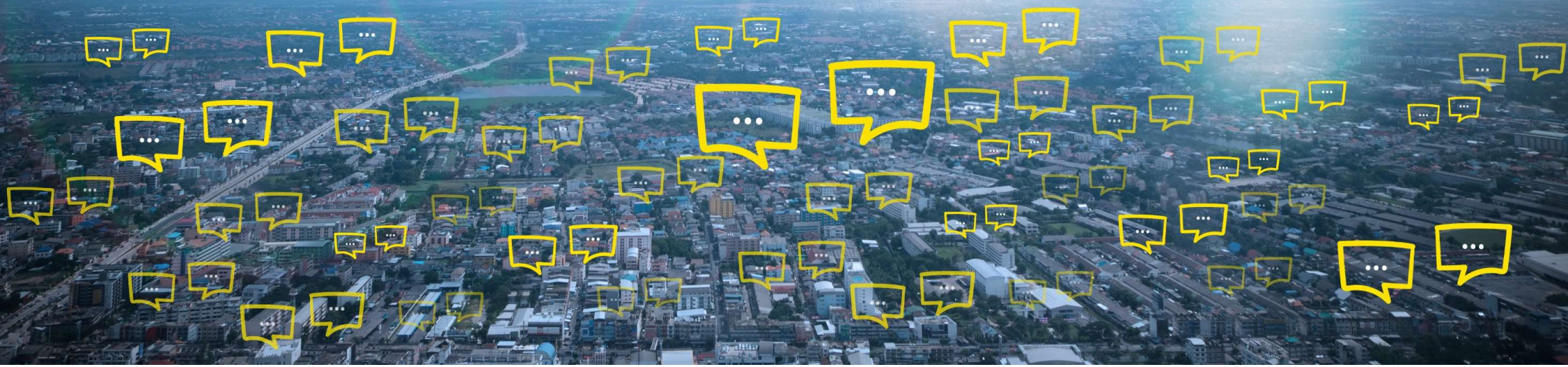
AI in Sales and Marketing: Event Series

- **Sales Coaching and AI** (Nov 13)
 - WHY Sales Coaching: why sales managers have to rethink their role
 - WHAT needs to be done: the Sales Coaching Process and how AI can support
 - HOW to create sustainable change: example of engaging journeys using AI and conversational analysis

 - **Collaborative Negotiations and AI** (Nov 21)
 - WHY Collaborative Negotiations
 - WHAT GREAT Collaborative Negotiations look like
 - HOW to master the tactical aspects of a Collaborative Negotiation

 - **Sustainable Change with AI** (today)
 - WHY change in sales and marketing often fails
 - WHAT GREAT sustainable change looks like
 - HOW to create sustainable change with AI
- 

THANK YOU



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