Practical AI Sales and Lead Generation

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02

WELCOME TO THE AI PARTY

We'll cover:

- Why AI is worth your attention in sales and lead generation
- A quick breakdown of a basic sales process
- How AI can help with:
  - Identifying high-potential leads
  - Automating follow-up
  - Personalizing outreach at scale
- AI risks and ethical concerns
- Final recap and quick-start checklist

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WHY AI MATTERS FOR SMALL BUSINESS MARKETING

INTERESTING STATS & INSIGHTS:

Businesses that use AI for sales and marketing report up to **50% more qualified leads and 20–30% higher conversion rates** compared to those who don't. (Source: McKinsey & Company).

From automating follow-ups to sorting leads, **78% of small business owners** report using AI has major time savings, allowing them to focus more on sales conversations and customer service. (Source: Constant Contact, 2024 Small Business Now Report).

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WHY SMALL BUSINESSES SHOULD CARE:

- Small teams, limited time – AI helps you do more with less
- Automates repeatable tasks so you can focus on relationship-building
- Gives insights previously only available to big businesses
- Helps level the playing field in a crowded digital space

04

SALES PROCESS BASICS FOR SMALL BUSINESS

SIMPLE DEFINITION:

a structured, repeatable system that guides a sales team through each step of converting a lead into a customer.

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5 SIMPLE STAGES:

01

ATTRACT LEADS
Get as much attention as possible!

02

QUALIFY LEADS
Does the attention match your target market?

03

NURTURE & FOLLOW UP
Court the qualified.

04

CLOSE THE SALE
Ask for the money. Don't be scared.

05

RETAIN & UPSELL
It's cheaper to keep 'am.
(Not our focus today.)

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SALES PROCESS BASICS FOR SMALL BUSINESS

WHERE MOST SMALL BUSINESSES STRUGGLE

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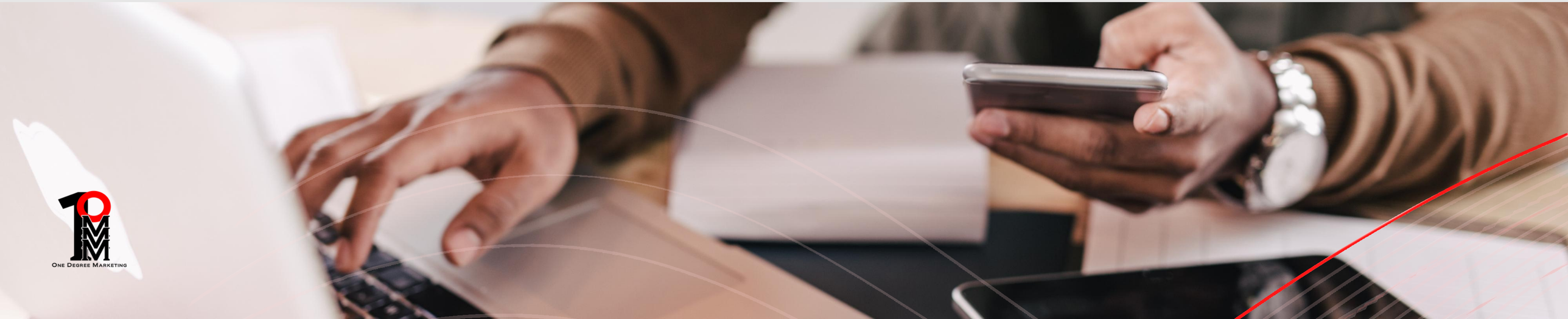
AI IN IDENTIFYING HIGH-POTENTIAL LEADS

AI Helps You Spot the Right People, Faster

HOW AI HELPS:

- AI can **analyze data** (engagement, website visits, buying behavior) to predict buyer interest
- Saves time by helping you **focus on warm leads**
- AI **finds patterns** you can't see manually



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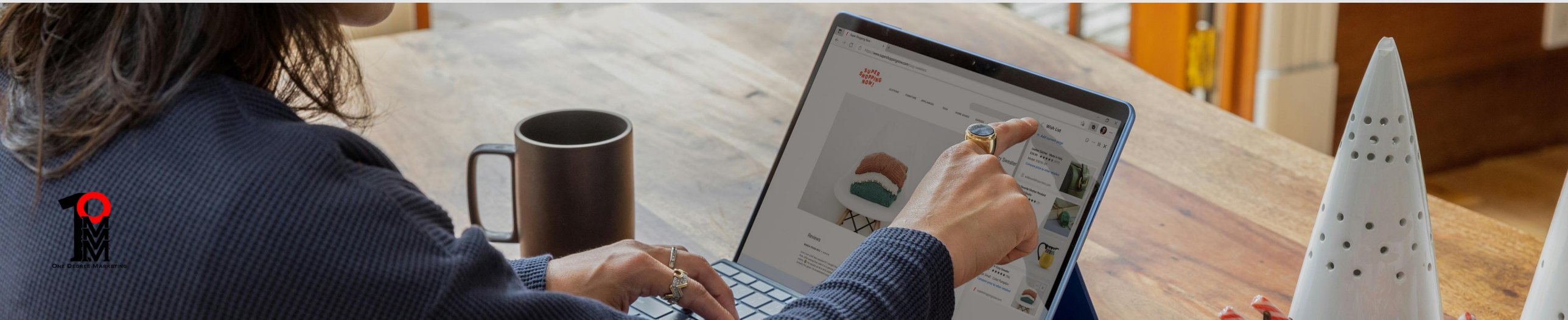
AI IN IDENTIFYING HIGH-POTENTIAL LEADS

Smarter Lead Targeting

BEST PRACTICES:

- **Start with clean data:** Your CRM, website visitors, past customer profiles
- **Combine** human insight + AI suggestions
- Focus on leads with signs of **readiness** (downloads, clicks, page visits)

Pro Tip:
Don't rely solely on AI—validate before outreach



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AI IN IDENTIFYING HIGH-POTENTIAL LEADS

Lead Scoring & Prospecting Tools

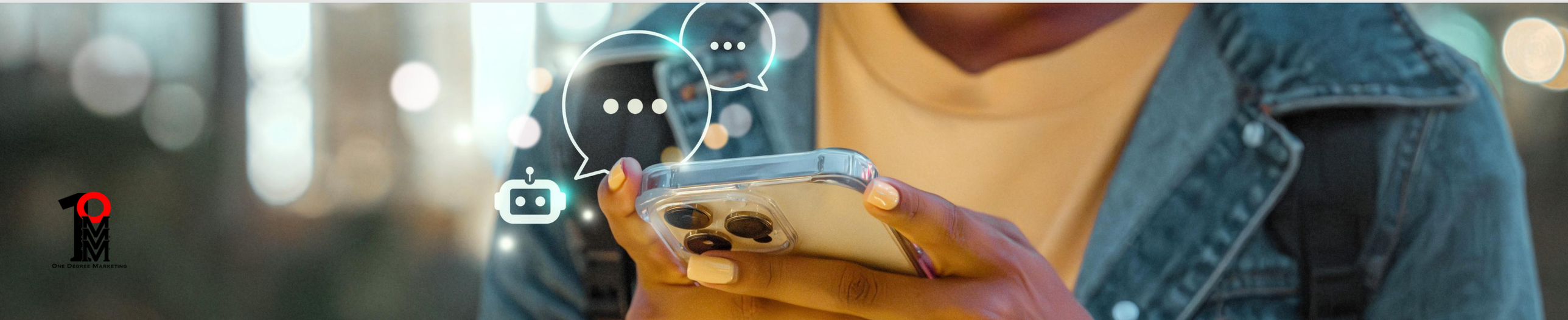
TOOLS & RESOURCES:

Apollo.io
B2B prospecting and scoring

Clay.run
Automates prospect research

ChatGPT + spreadsheet
Generate lead summaries from web data

HubSpot AI
Lead scoring for CRM users

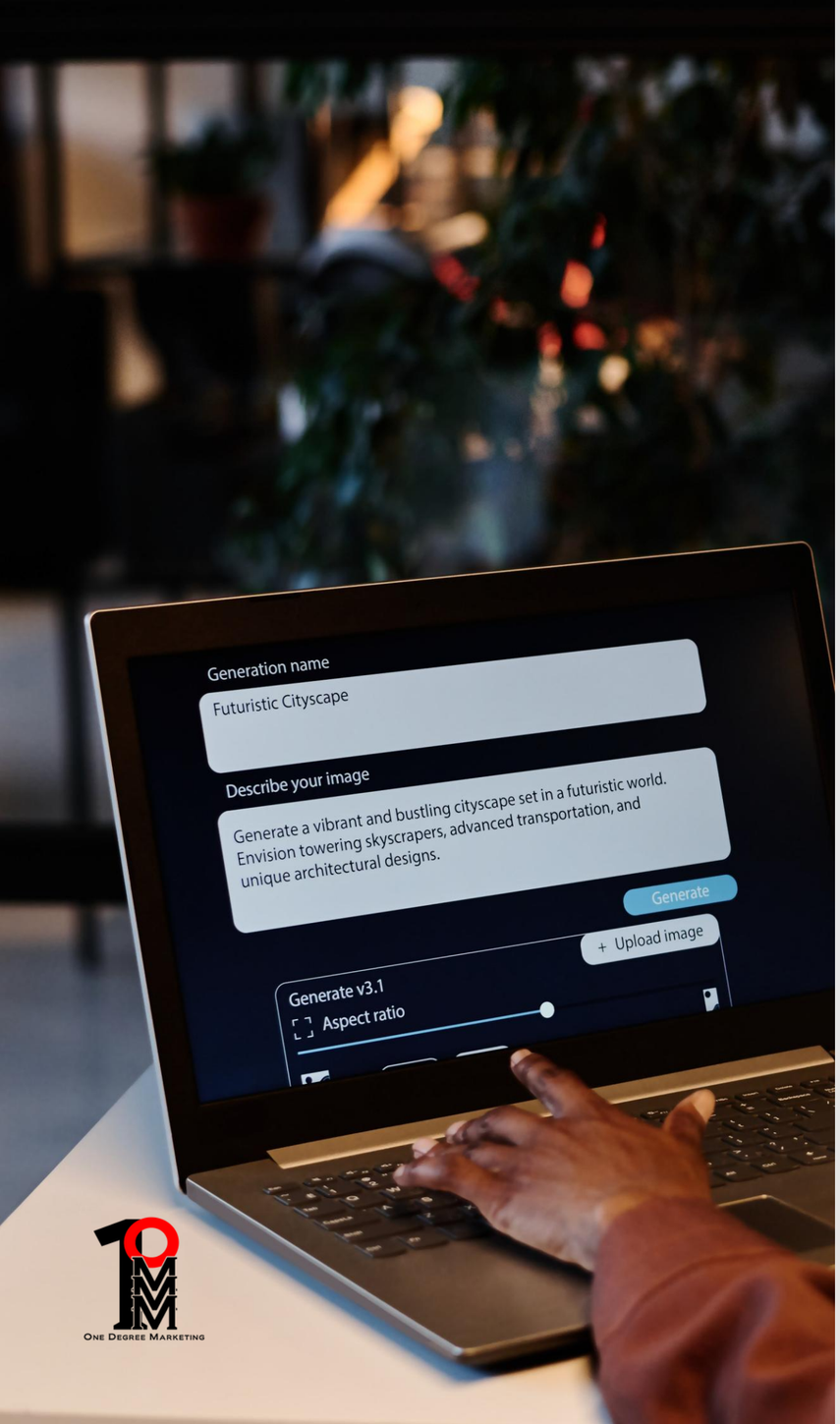


06 AUTOMATING FOLLOW-UP WITHOUT LOSING THE HUMAN TOUCH

Why Follow-Up Is Where Deals Are Won (or Lost)

HOW AI HELPS:

- AI helps you send timely messages without manual tracking
- Predicts the best time to follow up
- Writes initial drafts that you can personalize



06 AUTOMATING FOLLOW-UP WITHOUT LOSING THE HUMAN TOUCH

Smart Automation Doesn't Feel Robotic

BEST PRACTICES:

- Use workflows that match customer journey stages
- Keep tone warm and helpful
- Personalize the first line or subject line
- Test + refine sequences over time

Email sequence based on real life

Use AI to draft follow-ups

Use merge fields

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06 AUTOMATING FOLLOW-UP WITHOUT LOSING THE HUMAN TOUCH

Tools for Efficient, Human Follow-Up

TOOLS & RESOURCES:

Zapier
Connects forms/CRMs to email tools for automatic triggers

Mailchimp / ConvertKit
Automate nurturing sequences

ChatGPT / Copy.ai
Drafts conversational follow-up copy

Calendly + Email AI
Schedule follow-ups and reminder emails

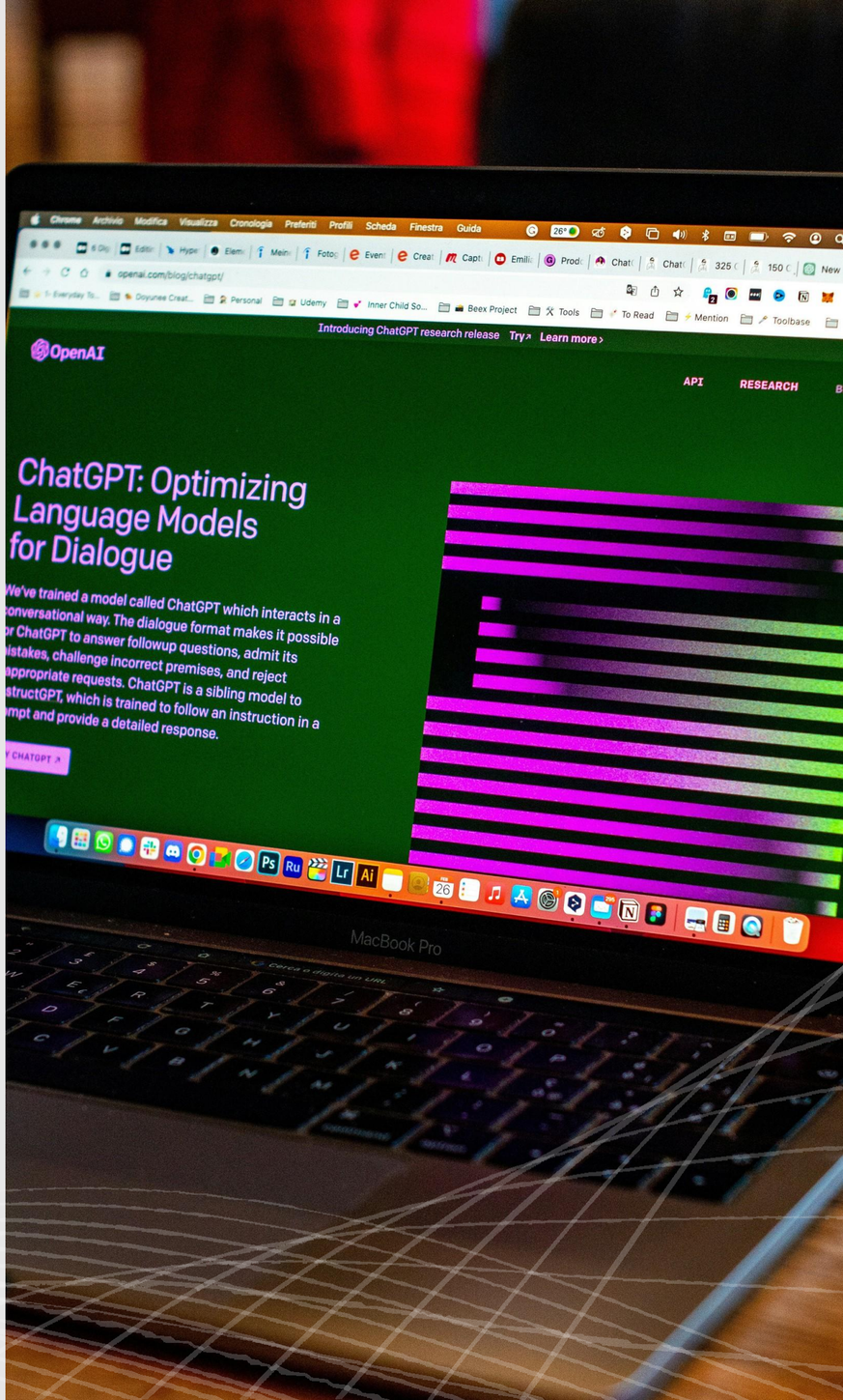
07

PERSONALIZED OUTREACH AT SCALE

Personalization Without Burnout

HOW AI HELPS:

- AI can customize messages using audience data (names, behavior, purchase history)
- Adds a personal feel to batch communications
- Helps you test subject lines, CTAs, and tone



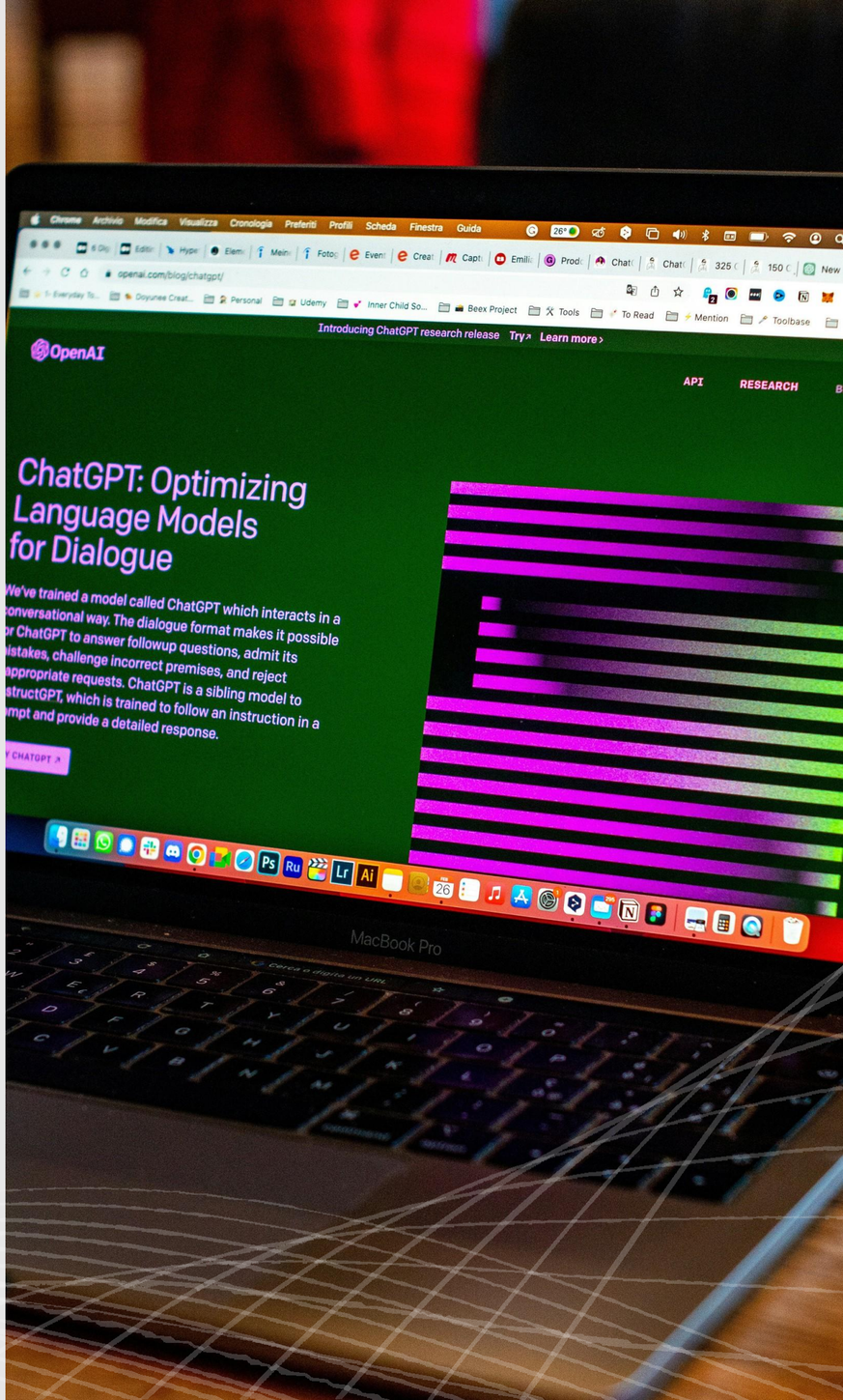
07

PERSONALIZED OUTREACH AT SCALE

Make It Feel 1-on-1Even at Scale

BEST PRACTICES:

- Use variables: name, company, last action, etc.
- Start with a genuine opener (AI can help generate based on profile)
- Don’t overdo it—authenticity over fluff
- Personalize *who* you send to and *what* you say



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PERSONALIZED OUTREACH AT SCALE

Tools to Personalize Your Outreach

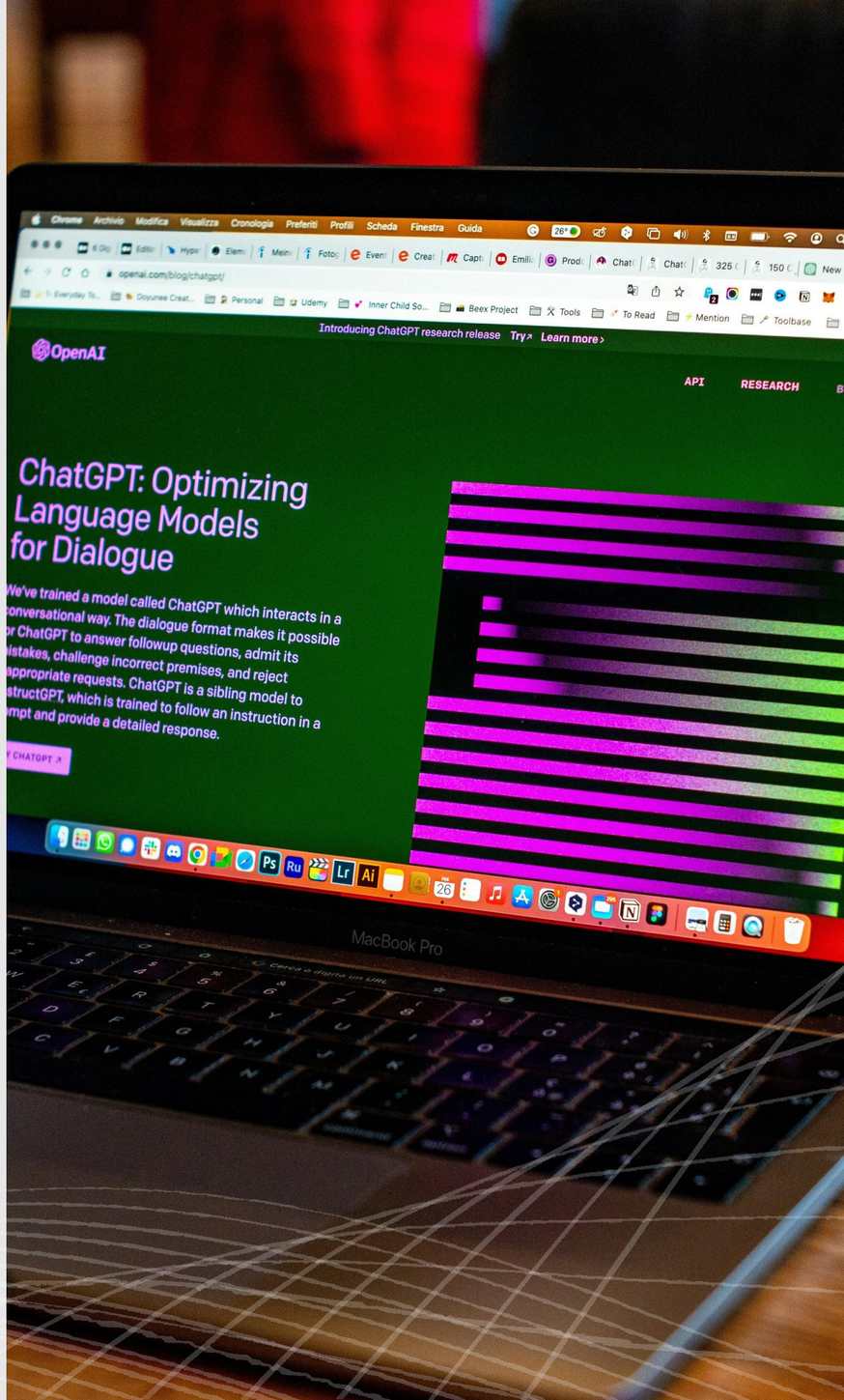
TOOLS & RESOURCES:

ChatGPT +CRM export
Generate email copy per contact

Lavender.ai
Real-time feedback on tone and personalization

Vidyard or Loom
AI-assisted personalized video intros

Mail Merge tools
Send custom emails in bulk



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AI RISKS & ETHICAL CONSIDERATIONS

LET'S TALK ETHICS:

- **Always** disclose AI-generated content when relevant
- **Protect customer data—**don't feed sensitive info into open tools
- Avoid "AI fatigue" – **don't over-automate**
- **Keep the human** in the process: empathy, listening, relationships

CHECK OUT
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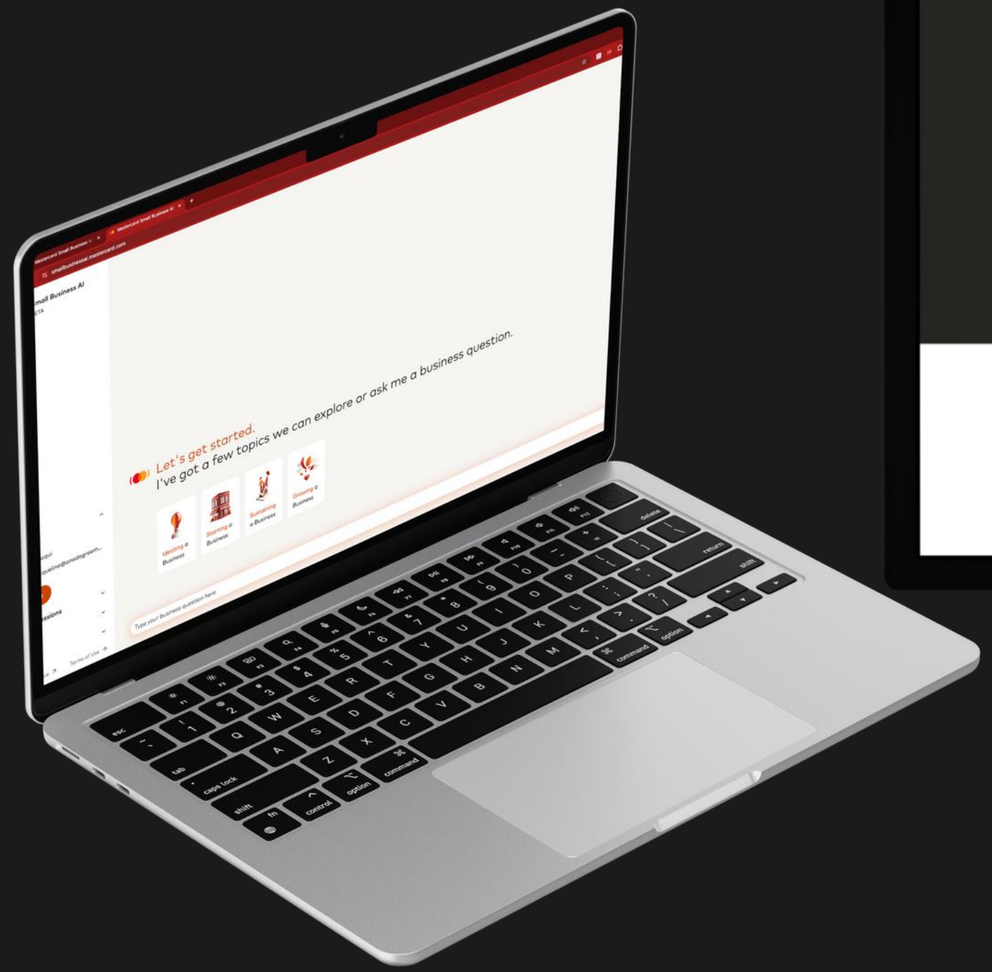

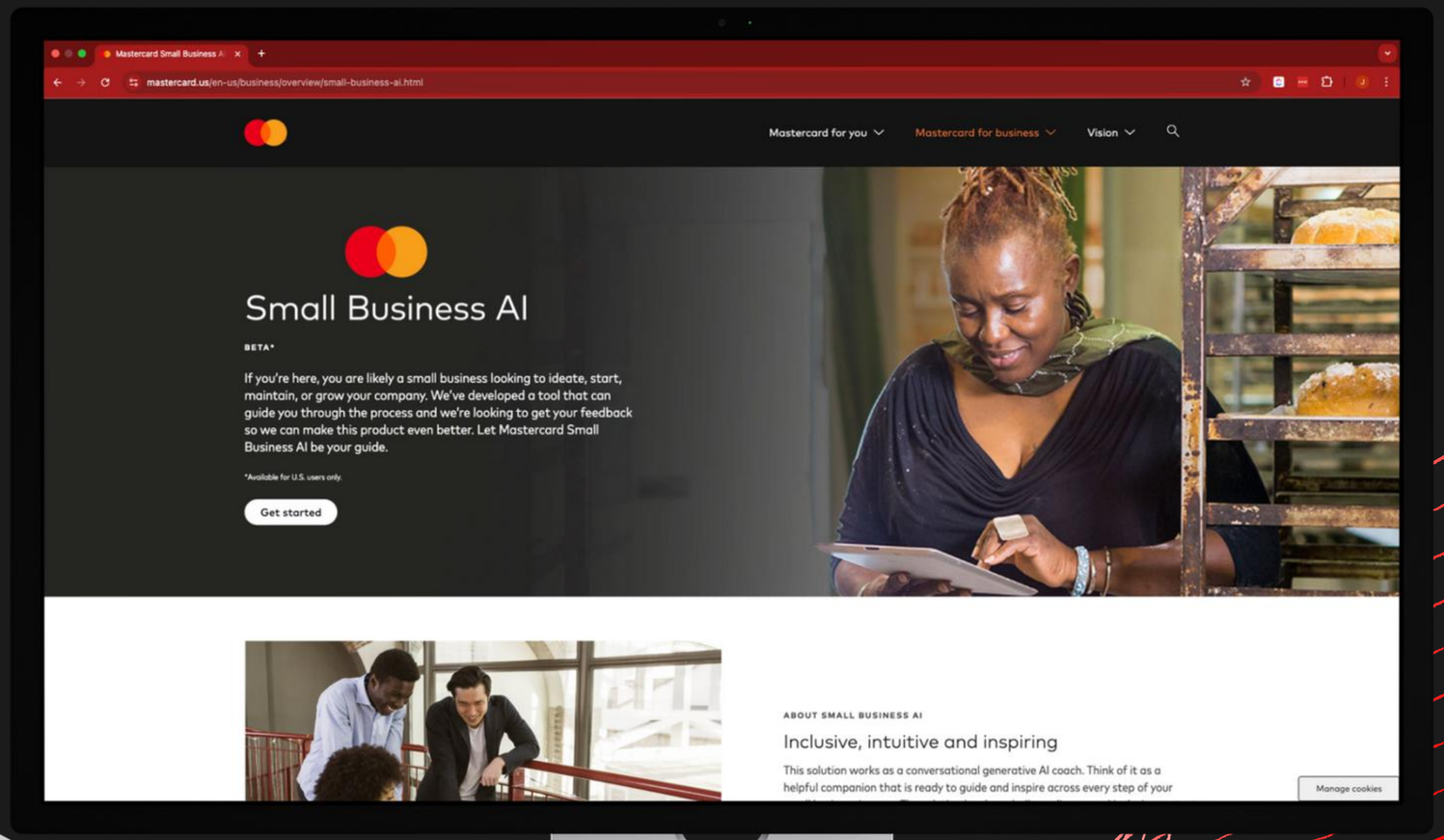

09 QUESTIONS?

PARTY RECAP:

- **Identify:** Use AI to find who's ready to buy
- **Automate:** Use tools to stay top of mind
- **Personalize:** Build trust and connection

AFTER PARTY WORK

- Choose one AI tool to test this week
- Review your follow-up sequence—where can AI help?
- Draft a personalized email using ChatGPT or other tool
- Block 1hour to review your CRM or lead data
- Set a goal: AI should save you time, not add work

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THANK YOU!

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