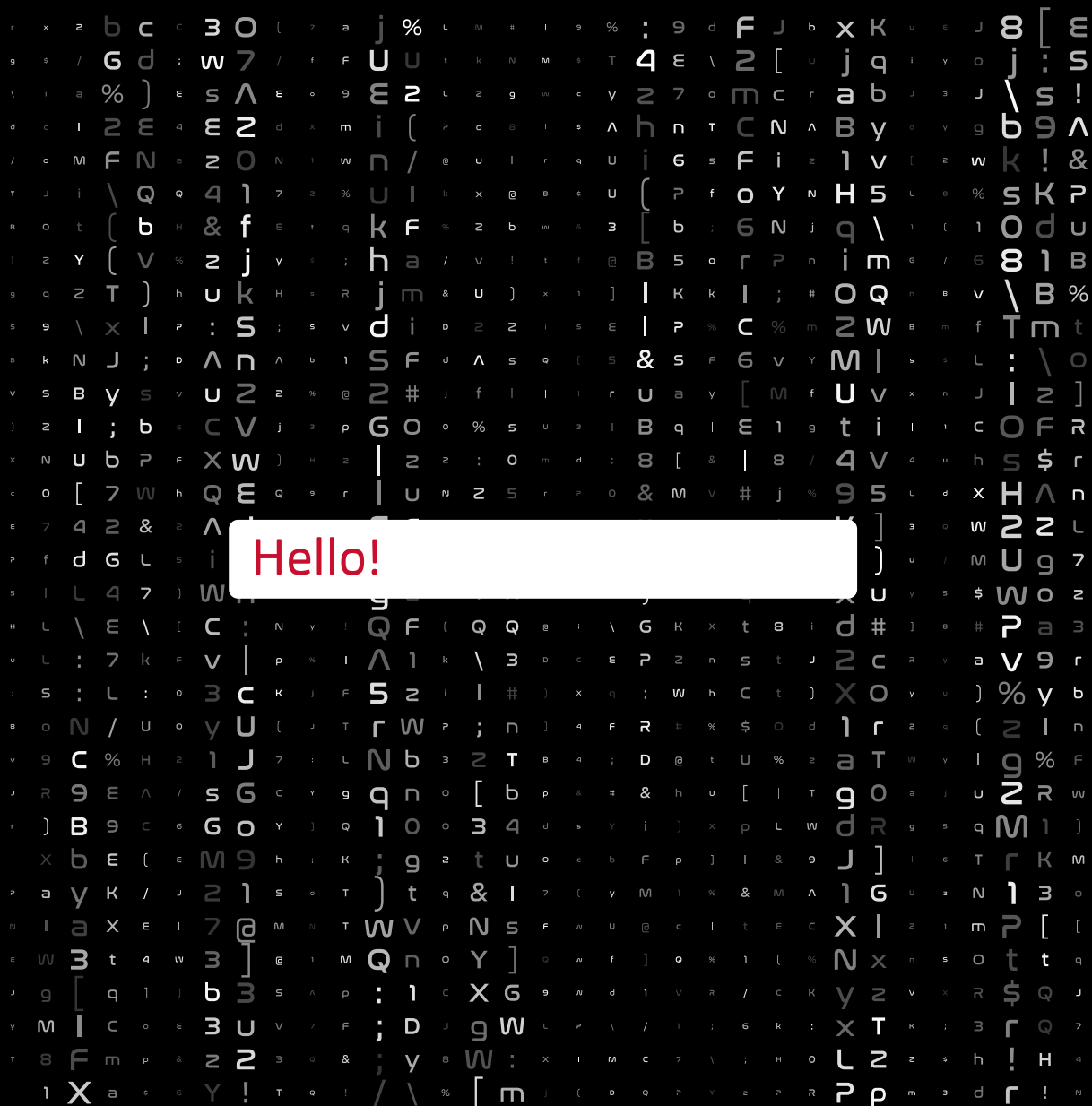


The case for the human – AI as sales co-pilot, not competitor

Top tips for intelligently embracing the future of sales



Contents

What is Generative AI?	04
AI, sales and learning	08
Learning, AI and Conversational Intelligence	19
Where to start with AI in sales?	26

This publication may not be reproduced (whether in whole or in part) in any form or by any means whatever without the permission of Huthwaite Research Group Limited.

SPIN, Huthwaite and the Buying Cycle are trademarks of Huthwaite Research Group Limited and are registered in many countries throughout the world.

This publication shall not be used in North America, South America, Australia, New Zealand or Japan without prior written permission from Huthwaite Research Group Limited.

What is Generative AI?

Since the emergence of ChatGPT on to the scene in late 2022, interest in the power of Generative AI has been astonishing.

As with any new technology that captures the attention and imagination of those who love technology and are adept at social media, there has been quite a lot of noise about AI which has not necessarily been accompanied by an attendant amount of light.

So, what's all the fuss about? How much of it is hype, and how much of a real opportunity is it for organisations and their people?

Generative AI, at its most basic, is best understood in two parts. 'Generative' means that it can create new digital content – whether graphics, video, text, or speech. Generative AI can also write new computer code – perhaps not obvious to most of us, but potentially greatly accelerating the creation of new software or new apps.

The AI piece means – of course – Artificial Intelligence. The definition of AI has not really changed much since its invention in 1956. It was then, and is now, the simulation of human intelligence by machines – usually computers.

While AI powers most of the world's search engines, the move from the provision of a series of links that match some or all of the search terms used to a human-like answer to a question is a quantum leap. The ability that the user now has to ask follow-up questions moves beyond the realm of 'looking something up' and into the realm of having a digital assistant.

Although named for its generative capability, it is the interactive component of these new technologies that is most exciting.

Imagine searching for something on the web. You open a search engine, type in what you are looking for and in milliseconds you have 2.5 million links which will, ostensibly, answer your question. Many of these will have a tangential connection, at best. You will need to wade through the sponsored links which have popped up because you entered some keyword that someone somewhere thinks surfaces your interest in a holiday to Barbados, a magic cure for baldness or the chance to win a car in a raffle (delete as per your most frequent searches).

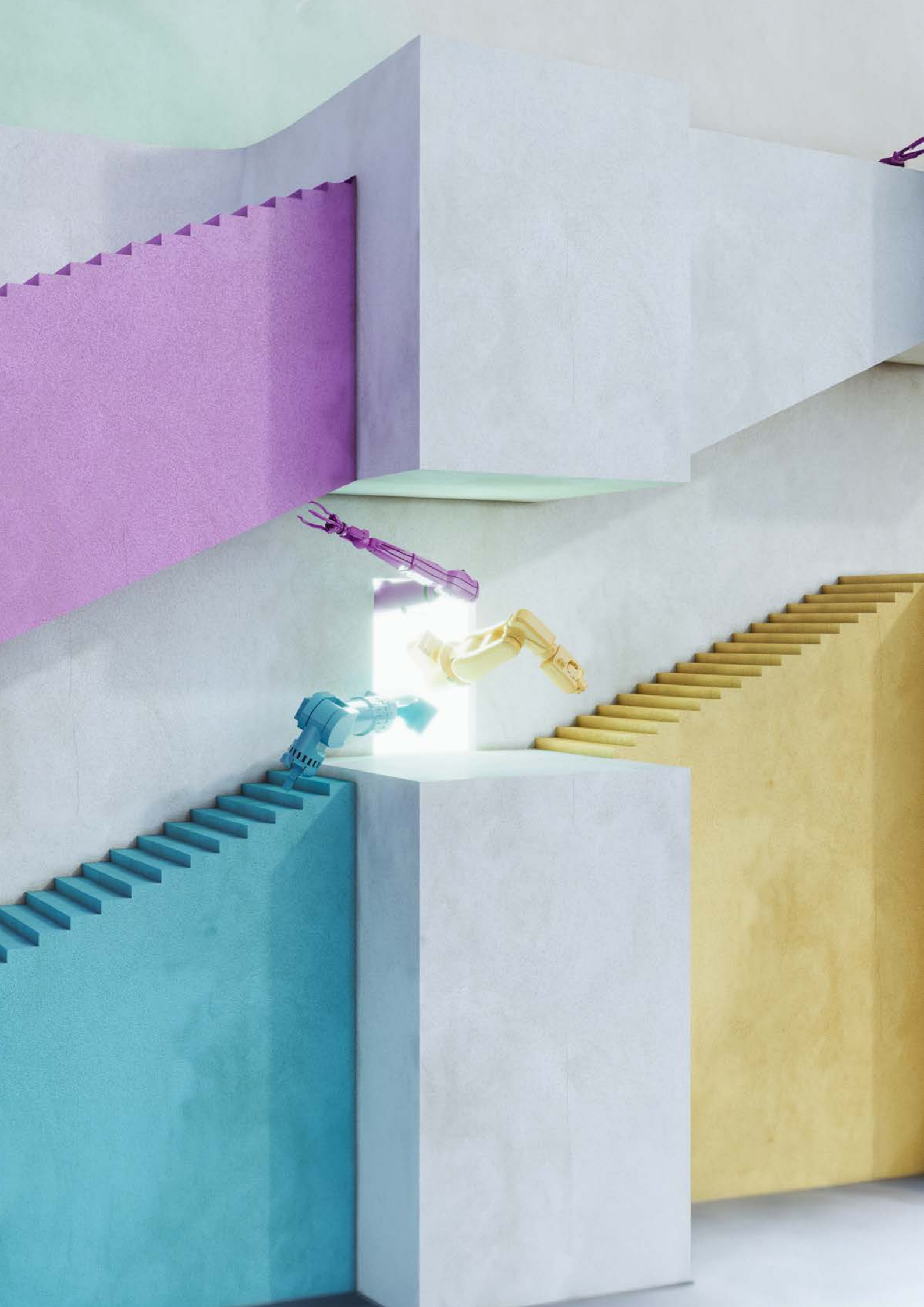
If you think the search was not very good, enter another search question **and start the process all over again!**

Now, imagine asking a question of a Generative AI tool. It will provide an answer. You may think the answer is terrific; you may feel it is not quite what you were looking for. You ask it another question. This time, you are not entering a **new search for information**, but requesting a **refinement or extension of the previous answer.**

You may ask for the source of the information presented. You may refine your prompt to ask for the output in a different format, or to include a specific perspective or to set some kind of boundaries around the response given. You have interacted with the tool as though it were an endlessly patient and beneficent human.



Although named for its generative capability, it is the interactive component of these new technologies that is most exciting.”



This human-like interaction with a computer is the basis of **Prompt Engineering** – and the dream of the early pioneers of Artificial Intelligence.

Prompt engineering is the process of structuring text or a question that can be interpreted and understood by a Generative AI model in order to produce a desired output. When anyone first tries to interact with Gen AI, inevitably, there is a process of trial and error. The first prompts may be somewhat wide of the mark. They may not quite produce what was required. Effective prompt engineering increases efficiency by reducing the number of interactions to achieve the desired output.

However, while the information presented may be produced quickly and be more accurate than simply consulting a single internet source found through a search engine, this does not make it infallible. Although different Generative AI tools work differently, they mostly draw data from the internet. The rules set by their creators determine the information sources they use and, therefore, the reliability of the output.

Some Gen AIs only source information from peer-reviewed papers. Others will extend out to other sites where there is robust fact checking – including certain media sites, government and intra-governmental research bodies, and encyclopaedias, as well as academic and educational websites. Others will simply use the internet, or a version of it, depending on how and on what content it was initially trained. This potentially presents risks related to copyright infringement, incorrect information and material posted by interest groups with – potentially – scant regard for truth, honesty or accuracy.

Machine learning is the blanket term for all the processes that help the AI to improve its ability to respond to prompts. Essentially, when you create a prompt, the information you feed in is retained by the Gen AI.

The number and content of the prompts you wrote in order to satisfy your request are recorded and the algorithms are adjusted to improve performance (i.e. fewer prompts required to get to a satisfactory response).

AI, sales and learning

If you read those definitions, you might think, “That’s interesting. We have new tools that review large amounts of data and give us an answer. What’s that got to do with sales, commercial skills or helping people to change their behaviour?”

According to an oft cited piece of research by [Gartner](#), “60% of sales activities will be undertaken by AI by 2028”.

[Goldman Sachs](#) told the world in early 2023 that “300 million jobs worldwide will be affected by Generative AI”.

Gartner



Those are big numbers. Is there any evidence to support these assertions?

I decided to ask a Generative AI – **Claude.ai by Anthropic**. This is what it told me:

Goldman Sachs has not provided detailed analysis or methodology to back up their claim that 300 million jobs could be affected by AI. This seems to be more of a broad estimate or projection rather than a definitive research finding.

Goldman Sachs

300 million jobs worldwide will be affected by Generative AI.

A few points about this claim:

- It does not necessarily mean 300 million jobs will be eliminated, but that they could be impacted or disrupted in some way by AI and automation.
- The types of jobs most susceptible are routine, repetitive roles that can be automated by AI systems and software – think data entry, customer service, basic office tasks, etc.
- However, AI could also create new jobs in areas like AI development, data labeling, analysis of AI outputs, and so on.
- The timeline for when these 300 million jobs may be affected is unclear. Widespread AI disruption could take years or decades to fully play out across industries.
- Major analysts and think tanks like McKinsey and the OECD have made similar estimates about the future impact of automation on the global workforce being in the hundreds of millions of jobs.

In summary, it's an eye-catching projected number meant to illustrate AI's potential to reshape the job market, but the specifics behind Goldman's 300 million estimate are not clearly laid out. The overall direction of AI disrupting certain job categories does seem directionally valid based on most expert analysis.

So: possible, but it is an estimate.

How speculative or well researched this best-guess is isn't clear, but the final bullet point seems to suggest Goldman Sachs are not alone in their thinking.

What about Gartner's claim that 60% of sales activities will be undertaken by AI in just 5 years from the date of the projection being made? I asked Claude again. The answer was pretty lengthy, so I'll pull out a few key statements:

There does not appear to be detailed published research or methodology behind Gartner's specific claim that 60% of sales activities will be undertaken by AI by 2028.

AI is certainly being applied to many sales and marketing activities, like lead generation, data analysis, forecasting, customer segmentation, etc. However, claiming 60% of all sales activities will be fully automated is quite an aggressive projection.

Many sales tasks, especially those involving human relationship building, negotiation, and closing deals, are difficult to fully automate with current AI capabilities. Augmenting human sales staff with AI seems more realistic in the near-term.

Gartner's specific 60% projection for 2028 does not appear to be convincingly backed up by publicly available analysis or data. Reasonable experts may disagree on the precise extent and timeline for AI replacing human sales roles.



AI could also create new jobs in areas like AI development, data labelling, analysis of AI outputs...”

Let's pick up on two of those points:

1. AI is being applied to many sales and marketing activities

The range of sales and marketing activities imagined here go way beyond the traditional role of the Business-to-Business field sales professional. As well as there being no clear distinction between business-to-consumer and B2B, the automation using AI extends to inside sales, lead generation, sales forecasting and revenue operations.

Some of this automation is about the customer:supplier interaction. Chatbots may have been around for a while, but we have all had experience of frustrating interactions with badly programmed avatars on websites. The power of Generative AI to more effectively understand the customer's questions' and route the customer towards a transaction clearly replicates and potentially replaces some inside sales activity – especially for in-bound agents.

Furthermore, Generative Pre-trained Transformers (or GPTs) can be embedded in customer-facing websites supporting online purchasing – providing much richer and more effective interactions than a few FAQs with pre-programmed answers. For organisations who have a business based on repeat orders, these models are likely to be both effective **and** a requirement of procurement teams seeking to reduce the cost of just-in-time supply lines and stock replenishment.

One of the most regularly seen applications of Generative AI in sales activity at the moment is in the creation of emails going out to potential prospects. Many of you will have noticed an increase in the number of direct emails in your inboxes since the emergence of ChatGPT. A seller can feed in a name and job title in order to generate a more personalised email that the standard mail out and, of course, by working from a database of contacts, the whole process of sending out direct messages via email, LinkedIn or other platforms is relatively simple to automate – even down to including the opportunity to book a follow up meeting with the designated seller via an online calendar tool. Significantly more messages can be generated with fewer resources and those messages appear more personal.

But let's remember that **spam is still spam** and the ability to annoy more people more quickly at a cheaper cost seems a limited benefit of applying this breakthrough technology.



The power of Generative AI to more effectively understand the customer's questions' and route the customer towards a transaction clearly replicates and potentially replaces some inside sales activity - especially for in-bound agents."

2. Some sales tasks are difficult to automate with current AI capabilities.

This speaks to the uniquely human skills of sellers and the role that those sellers play in the buyer's journey from contact to contract.

Over five decades, Huthwaite International has been researching the behaviours that successful sellers use differently – and more effectively – than their less successful peers. Some of these behaviours are “uniquely human” in that they cannot be easily replicated by artificial intelligence (at least at the moment).

The first of these is **asking high-quality questions** that uncover customer needs and requirements. We know from our research and the research of other academics that asking questions builds rapport. Rapport between the seller – and by extension the seller's organisation – and the buyer and their organisation. Asking questions which, on face value, may feel intrusive or which involve the buyer in revealing information they may be reluctant to share, relies on some kind of rapport. That rapport may be built on the basis of professional respect, acknowledgement of expertise or personal

connection (and maybe all three). Whatever the basis for that rapport and connection, it is essential if the seller is to gain high-quality answers to high-quality questions.

The great thing is that asking those high-quality questions contributes significantly to the creation of rapport and to the building of trust. In using AI to sell, most buyers are unlikely or unwilling to forget that they are talking to a machine – however smart or however much it mimics human interaction.

Having uncovered problems, good sellers recognise that **customers live with problems**. Until the problem they are facing is also matched with a vision of a future when the problem is resolved, many buyers will endure the pain they are experiencing, rather than make a potentially expensive or risky decision to embrace change. Again, the presence of a trusted human with clear expertise can support the customer's progression from despair to hope much more effectively than any form of automation.

Finally, **influencing** someone towards a particular solution and demonstrating organisational capability and the value of working together gets harder the greater the potential consequences of making a wrong purchasing decision.

Example: Choosing a paper supplier is relatively easy – we can revert back to our old supplier if the promises made do not materialise. It's much more difficult to reverse the decision to install different printing equipment into which the paper will be loaded.

People are influenced by people – **not** by bots. Mitigating risk, feeling positive about change and willingly stepping into the unknown, are best undertaken with the support of a skilled and trusted human.

Whilst those examples are “uniquely human” skills and behaviours, they can be supported – and super-powered – by better access to data, which is summarised and presented to the salesperson in ways that are quickly digestible and able to be put to use.

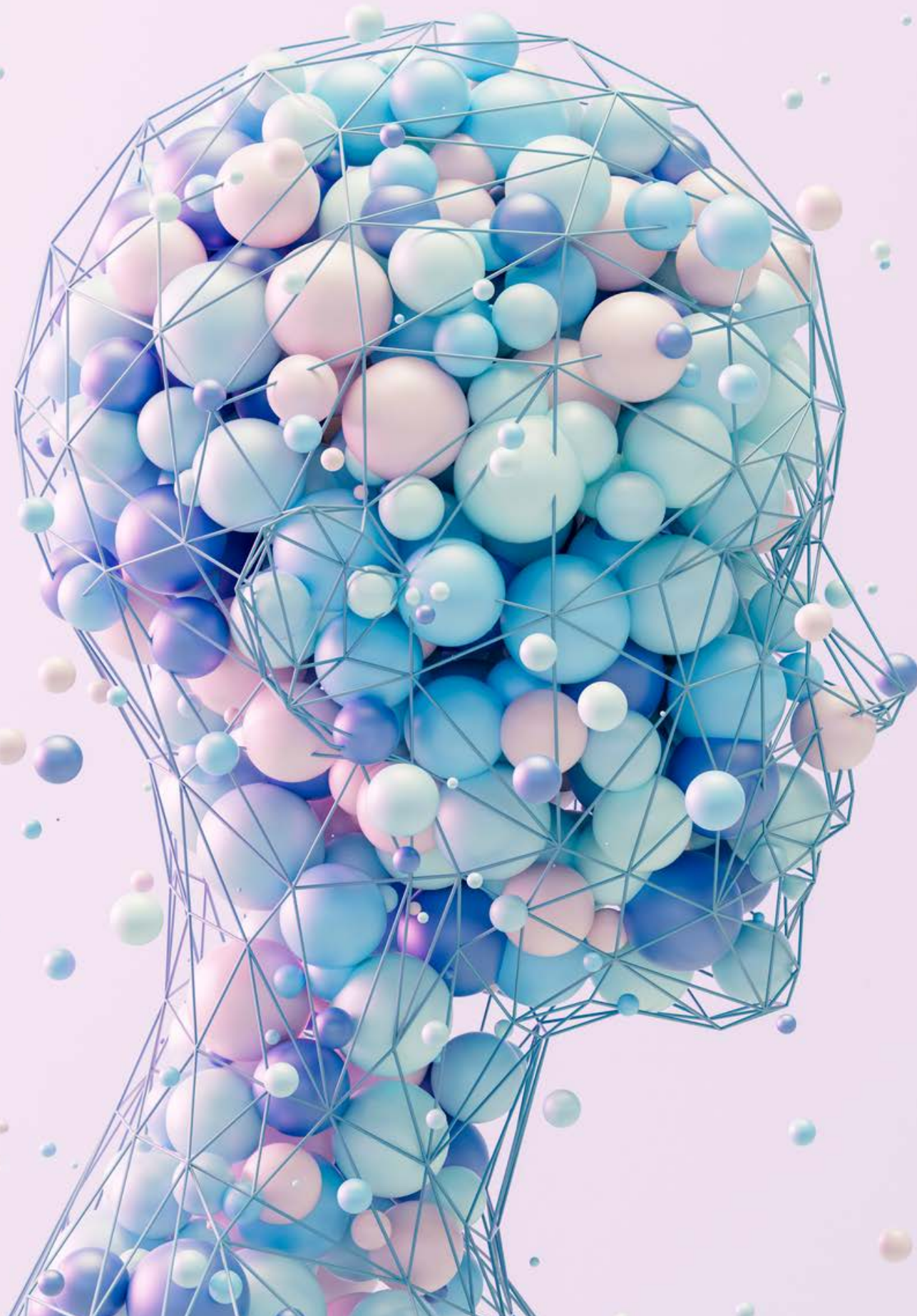
AI **can** help here. Those organisations who use their own data to help generate summaries and answers to seller questions can enhance the ability of skilled sellers to undertake those sales tasks.

However, the companies who succeed will have in place clear governance regarding their use of AI. They will have mitigated or removed any potential risks of sharing their data with a piece of software that lives on the internet. Let's not forget that these Generative AI tools improve using Machine Learning – any interactions with them generates data which informs future interactions. While it is not a given that this involves you surrendering any of your confidential data or data about your customers and prospects, it is also not a given that it doesn't.

Successful users of AI to enhance seller capabilities will also build on a foundation of having trained their staff to spot anomalies, mistakes and biases which have the potential to produce misleading or plain wrong responses to questions asked of AI. Generative AI is a co-pilot that assists people in decision making, planning and taking action. To succeed, smart technology needs smart people.



Mitigating risk, feeling positive about change and willingly stepping into the unknown, are best undertaken with the support of a skilled and trusted human.”



Smart-use cases

When thinking of how and where an organisation might use AI to super-charge their sales operation, I would suggest three areas of activity.

1. Call planning

Planning each call is pretty important. Certainly, it is better to invest in a little time planning than lots of time working out why a sale was lost!

AI can help planning by summarising data about past contacts, providing data about your company's interaction with similar companies in similar industries or territories; providing information about people who, potentially, may provide endorsements or references relevant to your contact.

Importantly, by looking at your sales process and what happened when your organisation was most successful, AI could suggest possible objectives for the call in the context of the stage of the relationship between seller and buyer. This will help the salesperson to sculpt the planned conversation towards achieving that objective.

Call planning

Segmentation

Industry trend analysis

2. Segmentation

One of the efficiencies of using AI is to automate some customer interactions within your organisation. In one company I worked with, salespeople routinely travelled hundreds of miles to visit customers, in order to complete their monthly or quarterly re-order. This is the ideal type of transaction that could be relatively easily automated using AI, or undertaken differently by, for example, inside sales or customer service teams with data provided to them in an accessible form by AI.

By freeing up that field sales resource, we now need to think where it can be most profitably and usefully redeployed. That's where customer segmentation plays a part. Understanding the clients or prospects where growth is most likely or where generating significant value will require more sales resources, is a crucial part of the effective leadership of a sales function. But which companies are likely to grow? Which present the best strategic match for your business?

AI can help answer those questions – especially if it is based on your own customer data. The problem you may face is: Where is that customer data? For many organisations, that data lives inside the CRM system. I have asked audiences at several events at which I have spoken a simple question:

“How many of you have data in your CRM which you consider to be complete and accurate in relation to your customers and prospects?”

So far, from audiences that now include many hundreds of senior sales leaders, only two or three hands have ever been raised!

With all technology, **Garbage In, Garbage Out** or GIGO, is still true. With AI, it is fundamental.

Before using your CRM data to inform an AI tool – whether built into the CRM, or simply using data extracted from the CRM – that data needs to be clean, updated and accurate. Until then, customer segmentation will be based primarily on gut feel, supported by incomplete data interpreted to support a decision which has already been made. AI is useless at gut feel and instinct – that is one of its undoubted strengths!

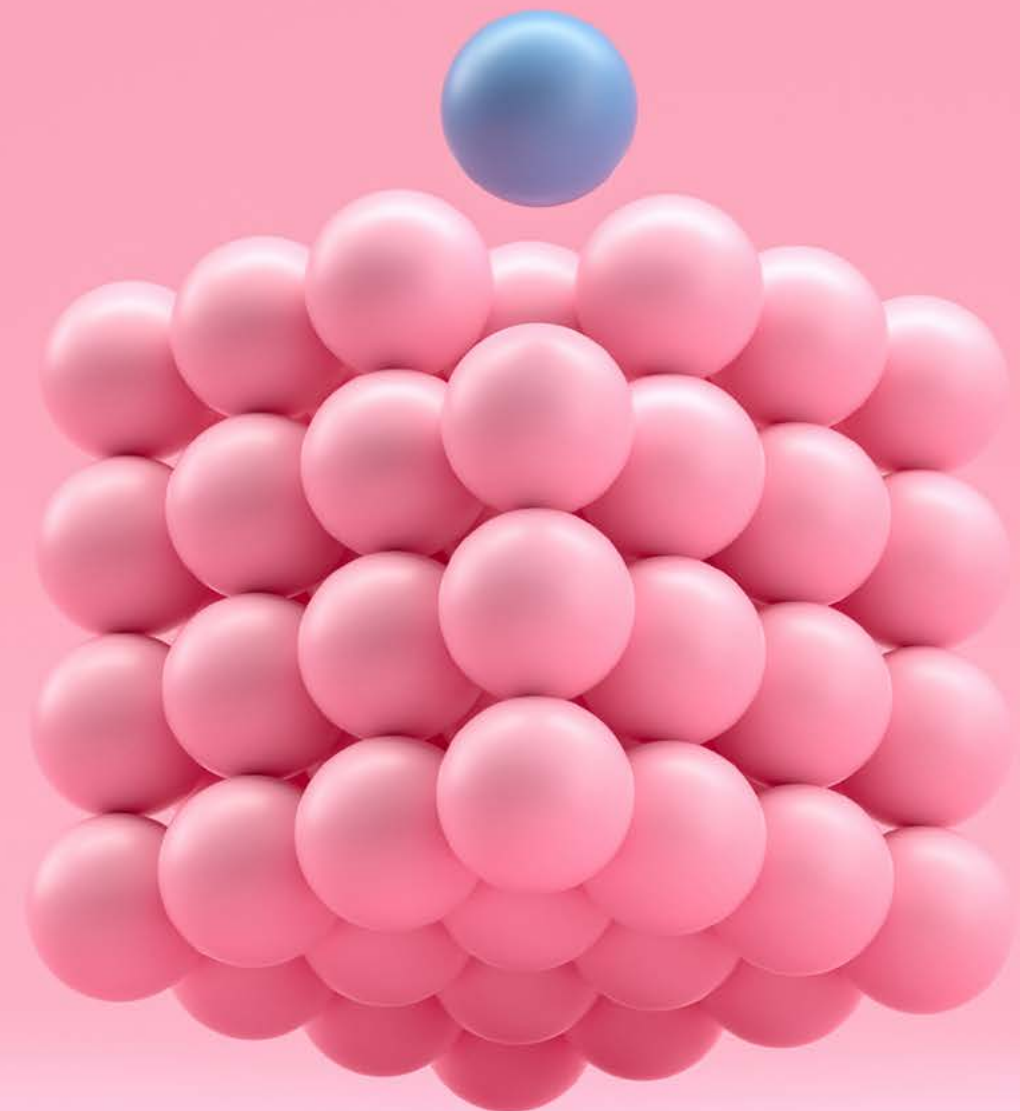
Call planning

Segmentation

Industry trend analysis



Generative AI is a co-pilot that assists people in decision making, planning and taking action. To succeed, smart technology needs smart people.”



3. Industry trend analysis

Generative AI tools are already pretty good at summarising trends and industry-specific data. You can start this process today, using existing GPTs available for free.

However, the real competitive advantage is not on using the same data as everyone else. The value is created by using that data and adding the secret sauce of your own, proprietary industry insights.

It might mean you have to get a considerable amount of information and expertise out of the heads of your people, and it might mean you spending time checking and validating that information. But your organisation's memory should be your secret weapon in unleashing the power of AI to create differentiation and competitive advantage. It might take time, but it's worth the effort.

Learning, AI and Conversational Intelligence

A seller's capability may be enhanced by these new tools, as AI becomes a source of insight or a route to summarising and making sense of large data sets.

But learning at work is far more than knowing things. AI is great at what sellers should do, but less effective in how they perform their tasks. This is especially true for those skills and behaviours that go beyond following a process and focus on the crucial communications skills all sellers need.

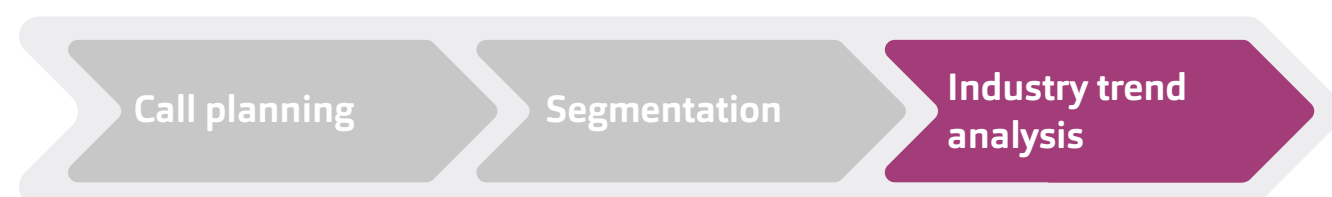
Enter **Conversation Intelligence**.

From sales enablement platforms to CRM systems to standalone apps, it is now possible to record and use AI to analyse what sellers say and how they behave in their conversations with customers.

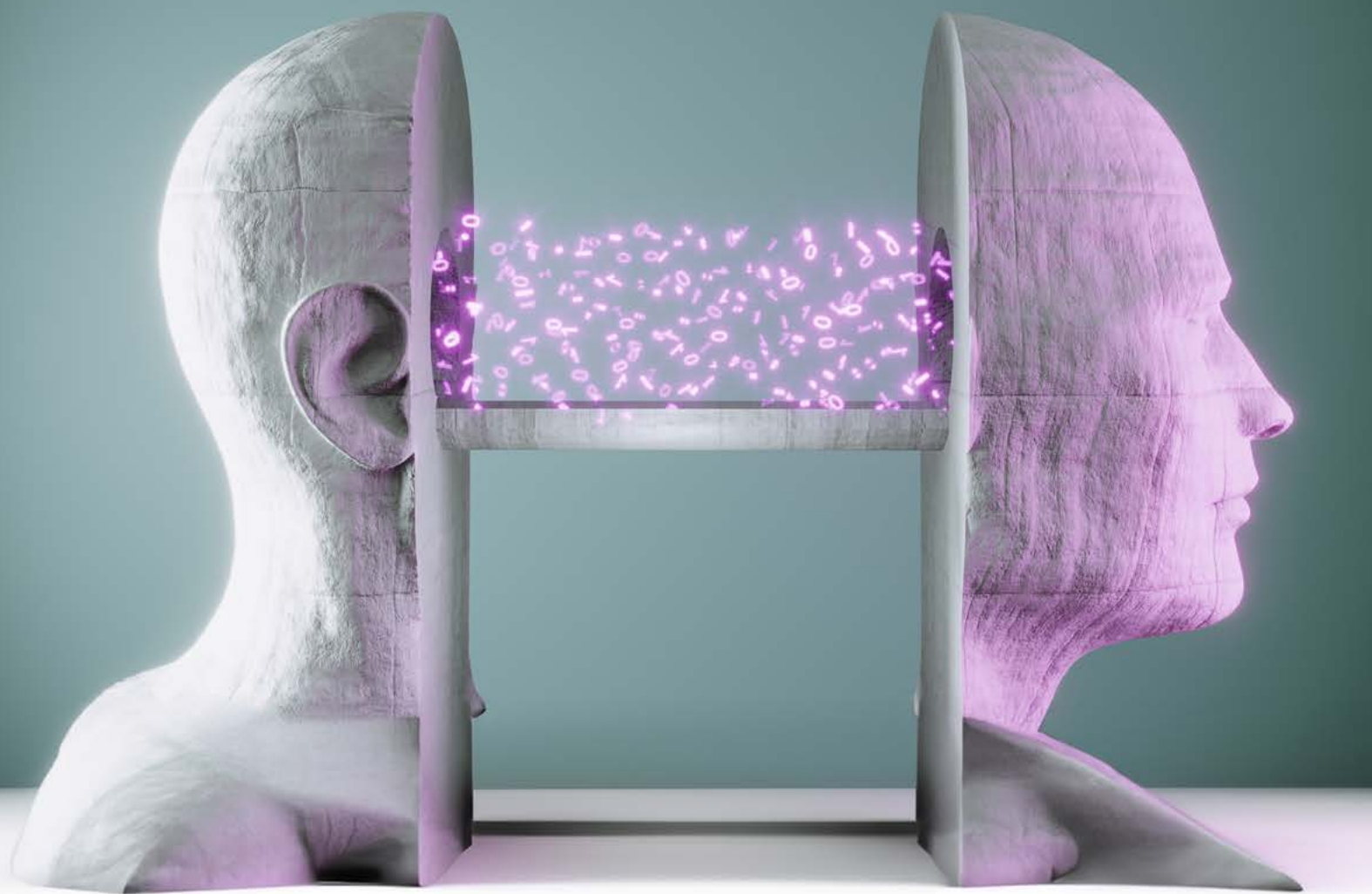
Or is it?

It would be glib to describe these tools as neither conversational nor intelligent. Unfortunately, for many of them, that description is only too true. But that doesn't mean that AI cannot provide analysis and insight about real, live customer interactions. It can, but the current crop of tools have been rapidly rushed into the market, and – as so many technologies have done in that past – many of them over-promise and under-deliver.

Let's look at the issues (and this list of considerations and questions may also provide an assessment guide if you have an opportunity to introduce one of these tools to help you build your team's sales capability).



The current crop of tools have been rapidly rushed into the market, and – as so many technologies have done in the past – many of them over promise and under-deliver.”



Perfecting one's ability to parrot the product description would be counterproductive at best and could actively harmful to your prospects of success”

1. What has the tool been trained on?

You know when you contact an organisation – or when an organisation contacts you – you may hear an automated voice tell you that ‘this call will be recorded for training and quality purposes’? Well, one of those training purposes is now to train an AI tool.

These announcements are usually associated with contact centres or inside sales teams. From a sales perspective, many of these calls are transactional, hoping for a quick decision to purchase a relatively low value item or to book an appointment with ‘one of our consultants’. Where the focus is on selling a product or service, many inside sellers use some kind of script or a series of talking points. These conversations are extremely numerous. Recording them is relatively easy. As a result, the bulk of existing Conversational Intelligence tools for sales have been trained on these conversations.

What the AI ‘learns’ is whether the seller followed the script, addressed any objections raised by the customer or managed any conversation about a competitor product or service. They also gather frequently made comments from prospects or customers and use this data to refine the scripts and call guides. The individual agent’s performance against these metrics is presented to them in a dashboard or chart with potential guidance about how to improve – either delivered by the AI, or by a coach or manager reviewing calls with their team.

The problem for business-to-business Sellers is that such insights are not entirely relevant to many of the more complex communication behaviours required in a consultative sales call. The idea of perfecting one’s use of a script – especially one based on the features of the product or service under discussion – would be of limited value. Huthwaite International’s research into effective seller behaviours has repeatedly found that describing a product’s features is not persuasive, and often leads to customer objections (and that – contrary to some sales training mantras – a customer objection is **not** a buying signal).

It follows, therefore, that perfecting one’s ability to parrot the product description would be counterproductive at best and could be actively harmful to your prospects of success.

2. Training and standards

This inevitably brings us to a discussion of what standards are applied by the AI. To provide feedback on performance, there needs to be some kind of exemplar or definition of what good looks like. This may be organisation specific.

Most conversational intelligence tools are built on the infrastructure of one of the commonly available Generative AI tools – such as Chat GPT, Bard or Gemini. These Large Language Models are general. In AI, a **Large** Language Model means humungous!

The processing overhead – and therefore cost – of using a model that may be able to analyse your sellers' capability, at the same time as being able to provide you with a detailed history of the capital of Mongolia, is significant. A general tool may not be quite as focused as you will need, and you may be paying for features you neither need and that will lead to inefficiency.

What's more, to gain differentiation from other organisations, you will need to train these tools to focus on your own standards.

- What does a good conversation sound like and look like for you and your organisation?
- Is there only one approved approach, or will it be different depending on where the customer is in their journey?
- Can your in-house experts anticipate the different questions, concerns or challenges your seller's may face?

And what about scale? If you have had the good sense to realise that you would like your sellers to have effective business conversations that are valued by prospects and customers – then you have a lot of training to do.

Neural Networks underpin most Generative AI tools. They are the mechanisms which underpin machine learning. They attempt to replicate how the human brain works to characterise data, weigh options and draw conclusions. (Source IBM).

To adapt these neural networks to learn what good looks like for you will likely need many thousands of data points within examples given to the AI.

To start that process, you will need to agree, adopt or reinforce a common language and agreed set of conversational behaviours across your entire sales team. Your sellers will need to know what these behaviours are, why they are important and how they enable them to meet their objectives for each call.

Most importantly, your sellers will need to know **how** to communicate with their customers, not just **what to say** about your company, its products and services.



3. Implementation mechanism

Once you have a tool that can 'listen in' on a conversation between your seller and a customer and provide feedback, how will that work?

Some Conversational Intelligence tools record what the seller says in live conversations but do not record the responses from the customer. While this may work from a data privacy perspective, it is – by definition – **not** conversational.

What about recording live conversations? Will your customer consent? What are the ethics and data protection considerations? What are the technical considerations if the conversation is face to face? Can the system easily differentiate between different voices? If so, how many? (And if you can't record live conversations, how will the AI pick up on – and learn – the behaviours used in successful sales meetings and how they differ from those conversations which are less successful?)

If live conversations are problematic – or the use of AI analysis is for training purposes ahead of live customer conversations – how is the feedback provided? Are seller's left to interpret the AI analysis, insights and feedback or supported by a trainer or coach? How easy is it for sellers to interpret the dashboards? Is it clear to either seller or coach what the analysis is telling them and therefore what improvements could be worked on?

While it may seem like conversational analysis is a powerful tool for sellers (and I genuinely think it has the potential to be so) there are challenges. Coaching is perceived to be difficult and time consuming. Many managers – even in companies with a so-called coaching culture – are reluctant to coach and may consider it not part of their role. Many sales leaders have been promoted, not because they are good at supporting their teams, but because they have a good track record as a seller. For some, this will be because they use positive behaviours and can share their experience. For others, it will have been more luck than capability. For a third group, they may be great but don't necessarily have relevant insights with which to help their colleagues – or the skills or desire to share them.

The best seller may not always turn out to be the best coach.

Many sellers are inexperienced at reflection and – again – may feel that reflecting on analysis and data is something that takes time they don't have or for which they are psychologically ill-suited or ill-prepared. Many may even feel resentful at being provided with support via a computer, rather than from a real human colleague or a trainer/coach they respect.

What you analyse is only part of the problem, **how** you use that analysis to improve performance will be a significant part of the success (or otherwise) of any deployment of a conversational intelligence tool.

SPIN® Selling is based on observation and analysis of what successful sellers do differently from their less successful colleagues. It will come as no surprise that Huthwaite International – the originators of SPIN® Selling and the organisation that carried out tens of thousands of observations of live sales conversations – believe that recording conversations and analysing behaviours is a good thing. Is AI yet able to provide this analysis? Is the analysis that it can provide valid and built on good practice? Is what is observed and recommended likely to lead to performance improvement?

The answer is **possibly** – but more work needs to be done. We're working on it, but we'd rather get it right than rush to market with a product that asks more questions than it provides answers.



[Discover more](#)

Where to start with AI in sales?

If you're new to AI and want to experience what's happening, don't worry, you are in the same place as many sales organisations. Very few organisations have gone beyond the experimentation phase.

My top tips are:

a

Choose your use cases first. What problem do you want AI to solve? What does the future look like once the problem is solved? Is that a good place to be? What are the short-term goals you need to achieve to get there? Can AI help to achieve those goals? Don't know? Experiment!

This simple process means you are working to achieve something rather than 'having a play'. Having a play might be fun and I'd recommend you do that as well – but plan where you are wanting to get to before you start.

b

AI as a co-pilot for sellers. Socialise the use of AI with your sales team by reinforcing that AI is an assistant, not the boss. Give space for your people to practice prompting and to share the prompts that generate outputs that are useful.

c

Sort out your data. The true value of AI for organisations will be when it is using the data from within your organisation alongside that which can be uncovered from the public domain. Remember GIGO!

d

Practice using AI to spot and summarise trends and patterns. This might be in your territory, your industry or in the industries relevant to your key customers and prospects. Start with the publicly available and accessible data to understand how useful these digests could be (and how much better they would become if you could add in your own data and insights).

e

Analyse your products and services and those of your competitors. Using publicly available data will mean this is, at best, a surface exercise, but it may help by indicating potential differentiators or unusual capabilities you have and that your current competitors cannot match. Again, using your own data alongside the generally available information will add huge value.

f

Involve your sellers. If your focus is on efficiency – freeing up seller time by automating routine or boring tasks – then ask them what tasks they would want to automate. There is a lot of suspicion, fear and misinformation about what AI could do. Inevitably, those who feel powerless in the face of its advance will resist and may even sabotage its introduction. If they're not on board at the start – and recognise how it will help them – then getting them on board later will be a much bigger, and potentially impossible job.

The logo for Huthwaite International is displayed within a red square. The word "Huthwaite" is written in a white, sans-serif font with a registered trademark symbol (®) to its upper right. Below it, the word "International" is written in a smaller, white, sans-serif font.

Huthwaite[®]
International

Tel: +44 (0)1709 710 081

Email: enquiries@huthwaiteinternational.com

Huthwaite International

Change Behaviour. Change Results.[™]