



Generative AI for B2B Sales

The Official Guide – 2024 Edition

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Foreward

Welcome: A Major Moment Has Arrived

Generative AI – artificial intelligence that can generate text based on human prompts and execute entire workflows– has already demonstrated the potential to be hugely value-additive to sales teams across all industries.

The sales technology space has changed drastically over recent years, and more tools, channels and platforms exist to reach buyers than ever before. And we've all had a front row seat to another defining moment in time for sales technology over this past year.

Thanks to AI, salespeople of all career levels are now crafting compelling, personalized messages that pique interest and get responses. RevOps teams are fully automating the repetitive parts of their sales team's workflows. Sales leaders have a new way to propel their teams forward to achieve ever-increasing quotas in a complex global economic landscape. And marketing teams have a line of sight into what is and isn't working with sales messaging.

As you'll discover in this guide created by my friends at Regie.ai, there are so many ways that Generative AI can help you and your team continue to increase sales efficiency and productivity, earn greater results, and stretch your skills.

But truly, what I love most about Regie.ai is that their platform removes many roadblocks that stifle the passion and effort reps want to put forth, but often don't have the time to do successfully. That passion – or "Fire in the Belly" as I call it – that drives success is greatly magnified for a rep when you supercharge your tech stack with Generative AI.

There's no denying it – Generative AI has arrived, and if you learn to harness it for sales success, it's going to be major!



Lars Nilsson

*VP Global Sales Development, Snowflake
CEO, Sales Source
Former VP Global Insights, Cloudera
Advisor, Regie.ai*

The AI Evolution

This guide maps out the obstacles to securing outbound-sourced revenue and how they stand to be removed with the help of Generative AI. With Generative AI at work alongside your sales motions, you could be looking at a little less grind and a lot more zing as a sales professional.

Ready for a helping hand?

Lars is right. Sales is having a major moment thanks to Generative AI. AI has quickly become indispensable to businesses because of the efficiency and revenue predictability it offers.

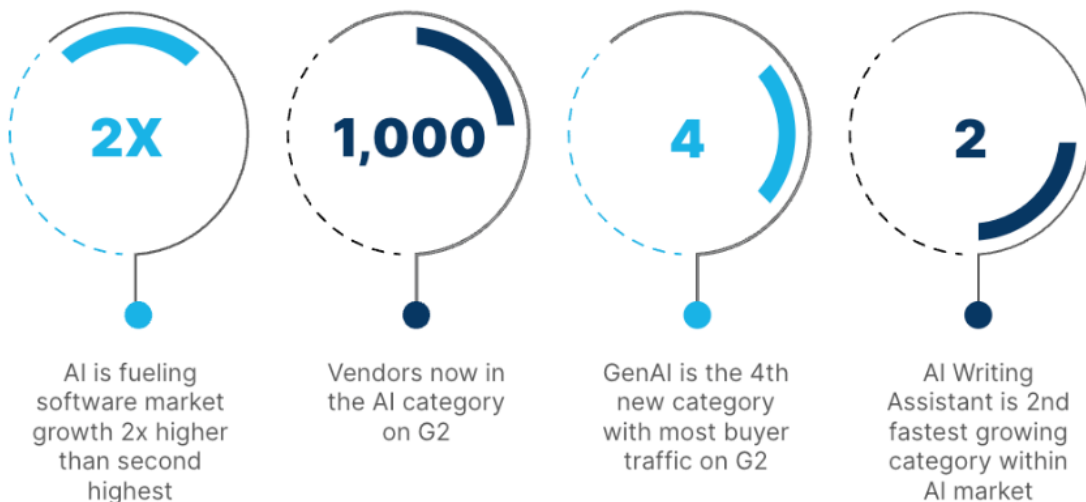
For some, it may feel like AI popped up out of nowhere, but the truth is, artificial intelligence has been evolving since the 1980s.

But no matter how you look at it, there is no denying that 2023 will forever be known as the year of AI.

The surge in adoption is certainly the case across G2, a peer-to-peer software review site. Check out the growth of AI from their latest State of Software Report:

AI has arrived

Q4 2023 The State of Software - G2



If it feels like all anyone talks about lately is AI, just wait. As more companies adopt new AI technologies and tools, the conversation will only heat up as everyone will be in AI ramp-up mode. The faster you and your team can get up and running, the greater your early mover advantage is in this exciting new world of AI-automated selling.

But to understand where we are headed with these exciting advancements, it's important to understand the road traveled to get here. Let's review a brief history of this increasingly powerful technology in relation to the evolution of sales outreach.

NEXT

The AI Evolution Timeline



The AI Evolution

AI Advancements

Evolution of Sales

Artificial Neural Networks inspired by the human brain

1980s

Smile & Dial Era
The popularization of telemarketing as a way to scale sales outreach beyond the field

Speech and image recognition

1990s

Email Era – 1:Many Outreach
With computers and the internet becoming a staple in most companies, email becomes a channel to rely on for mass outreach

Apple launches Siri, pioneering voice recognition at scale

2010

Full Cycle Reps
Full cycle sales reps responsible for orchestrating all manual workflows of the sales cycle

Google introduces Deep Neural Nets; increases in AI R&D

2012

Automation Era – 1:Few Outreach
Sales engagement platforms like Outreach and Salesloft are founded – the proliferation of persona-based email at scale begins

Google acquires DeepMind; efficiently identifies cats across images

2014

Insights & Data
Intent platforms like 6sense and Terminus are founded, and more prospect and company data is available to personalize sales outreach

OpenAI launches as a nonprofit to democratize AI

2015

Account Based Sales Era – 1:1 Outreach
Teams adopt more targeted outreach strategies to speak to accounts on a 1:1 level but it's still a challenge to reach the people at those accounts on a 1:1 level

Google builds BERT, an early version of AI that can imitate human writing

2018

Open AI releases GPT-2
Microsoft invests in \$1B in OpenAI

2019

Regie.ai is founded by Srinath Sridhar and Matt Millen

2020

OpenAI releases GPT-3 and Regie.ai gets access to these early AI models

2021

AI Sales Assistant Era – 1:You Outreach
True personalization at scale arrives, as teams start to use Generative AI to feed company and buyer insights into personalized prospecting platforms like Regie.ai

OpenAI releases ChatGPT, making Generative AI widely accessible and application mainstream

2022

OpenAI releases GPT-4

2023

AI Automation Era – 1:You Outreach
AI Agents change the role of the human in the sales process, by understanding autonomously who to target, in which channels and with what message, for optimal engagement

The Time is Now

We know that when it comes to B2B sales, there is nothing artificial about the need to scale outbound-sourced revenue, especially when it's getting harder to do so.

In fact, a recent study by GTM Partners shows that 50% of companies are missing their pipeline targets.

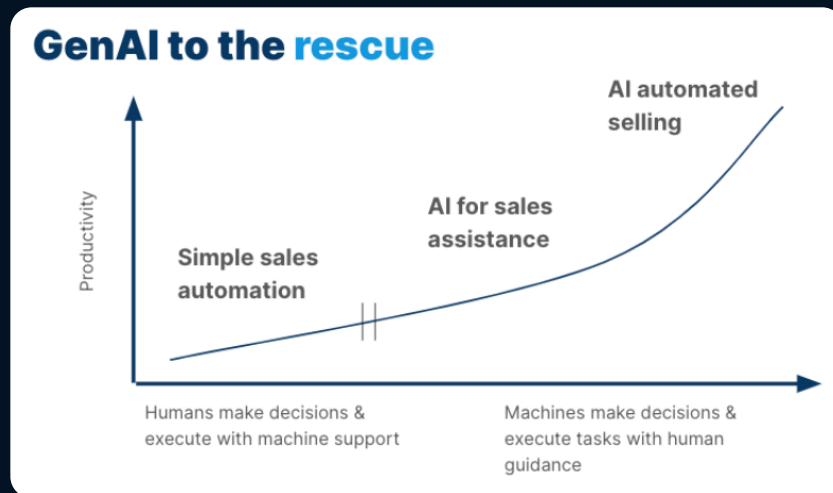
So what stands in the way of sales and operations leaders propelling their teams forward to meet their aggressive pipeline targets? It boils down to four things:

1. **Lead sourcing and prioritization** – it's time-consuming to sift through intent signals, identify the right audience to go after and build those target lists. Then, once the rep burns through their lists, they lose the leads to marketing for continuous nurture if not sales-ready.
2. **Technology trap** – on average companies spend around \$6–7K in tech per rep. With many disparate systems in a rev tech stack today, teams need help unifying their technology to deliver better buying and user experiences to maximize ROI. Furthermore, much tech does not fit seamlessly into the workflow of a rep which hurts adoption.
3. **Channel ineffectiveness** – diminishing engagement returns especially in the email channel. To compete, teams must personalize, but there is a time-intensive tax on true personalization.
4. **Talent rollercoaster** – productivity decline leading to seller burnout, and / or macro headwinds causing team downsizing means, like a college coach, sales leaders now have a short amount of time to assess and develop winning sales talent before they are gone.

Now, ironically, technology has been the promise to solve many of those challenges; there is tech to find and sort leads, there is tech that helps us open up new channels for engagement, and so on.

But advances in technology are often a double-edged sword; they provide solutions to very real challenges but also expose new areas that need attention.

In this instance, the success of revtech has always been dependent on human execution. Humans have been the perpetual bottleneck that this tech has had to pass through when it comes to owning a comprehensive, and coordinated prospecting workflow.



Now, thanks to GenAI, tech can begin making decisions on our behalf, absolving ourselves of legacy human-reliant prospecting. This now completely shifts the work required by an SDR in the sales process, making AI an imperative for sales teams to lean into.

You may know it as “artificial” intelligence, but today’s AI tools and capabilities are as real as it gets.

“This is a big deal for everyone in sales. AI is going to change everything. And the people who start using it early are going to have a big advantage, the same way we saw early adopters of Outreach have an advantage. Having early experience with Generative AI is going to have huge implications for SDRs in their careers.”



Sam Nelson

Founder, SDRLeader.com

Founder, Agoge

Former SDR Leader, Outreach.io

Advisor, Regie.ai

Two Truths and a Lie About How AI Will Impact Sales

GenAI will reduce the amount of time spent on prospecting and meeting prep by 50%+

TRUTH!

Gartner® predicts that by 2026, B2B sales organizations using GenAI-embedded sales technologies will reduce the amount of time spent on prospecting and customer meeting prep by over 50%.

Generative AI can increase leads by 35%

LIE!

The increase is actually larger! Harvard Business Review cites that companies that have pioneered the use of AI in sales rave about the impact, which includes an increase in leads and appointments of more than 50%. Add to that the value created by having human reps spend more of their time hitting the phones and closing deals, and the appeal of AI grows even more.

Generative AI can prevent seller burnout

TRUTH!

As our Head of Product Tom Tobin put it, "The reality is, sales development can be brutal. Think about how it would feel to write 100 emails and get only one or two replies. A career in sales can be more emotionally draining than many people realize."

One of the greatest benefits of using a Generative AI platform that's designed for sales teams is that it can lighten the emotional load and alleviate the stress associated with the job. It's funny how AI can influence human emotions in such a positive way.

"Sales has an especially high rate of burnout. AI sales tools help remove mundane tasks which then makes space for more exciting, engaging work. In sales we face a high rate of rejection, so leveraging a tool that can increase our win rates, makes the job more rewarding. The best way to use AI is by removing or expediting low-value tasks so we can spend more time being creative, intentional & strategic with our work."



Leslie Venetz

Founder, Sales Team Builder
Top of Funnel Sales Coach, SalesQualia
Advisor, Regie.ai

How to Level Up Your Sales Game with Generative AI

From our perspective, AI's big moment has been a long time coming. The evolution of artificial intelligence and B2B sales practices have converged, and the opportunity at this intersection is amazing.

Winners and losers are determined by how quickly they adopt and adapt to new technologies to better serve their buyers. Those not utilizing Generative AI will be at a significant disadvantage compared to their early-adopter competitors.

In this section of our guide, we'll cover three Generative AI trends we have observed from our earliest adopting customers, and outline a crawl, walk, run approach to implementing this innovative new tech.

As you explore different ways to use Generative AI to reimagine your sales workflows, don't forget this: we've been used to humans making decisions with technology's support. Now Generative AI is powerful enough to make decisions and execute tasks autonomously, on our behalf. But you're still the main character here. AI is meant to complement your strengths, not steal your thunder.

"Every era of new sales technology represents opportunity and challenge. Adopted in a smart way, it can transform your business. Ignored, it can help your competitors race ahead of you. Revenue writing assistance is one of these new technology waves to jump on."



Peter Kazanjy

*Co-Founder, Atrium
Founder, Modern Sales Pros
Advisor, Regie.ai*

Trend One – From Simple Automation to AI Automation

Historically, automations have been built using “if, then” statements – “If prospect from this segment MQLs, then auto-enroll them in this sequence.” And while it was novel 15 years ago, it’s table stakes today for prospect engagement.

In the pursuit for AI powered selling, the most advanced orgs are transcending simple sales automation and letting AI do the creative thinking *and* execution for them.

In other words:

Simple automation = think of a sales engagement platform, where humans tell the tech what to do with what content and the distribution of it gets automated

AI automation = AI knows what needs to be done, and does it for us, like generating a a sequence for every prospect, 100% autonomously

This is the oldest of the AI trends, and many modern sales teams have already embraced AI automation efficiencies.

AI in Action

For instance, Reputation uses GenAI to simplify sequence creation and streamline message level personalization for their front line reps.

The payoff? Productivity gains and campaign engagement lifts:

- 100+ hours saved per month through enhanced productivity and streamlined processes of their sales team
- Improved engagement:
 - Positive email reply sentiment 35% → **48%**
 - Email open rate 52% → **66.7%**
 - Email reply rate 4.8% → **7%**

LEARN MORE

[About Reputation's success with AI](#)



Trend Two – From Templates to Prompts

Significant updates from Google and Yahoo are reshaping the email marketing world and for the better. Organizations leveraging a spray-and-pray approach that rely on templates will suffer, while businesses that adapt with omni-channel personalization will thrive.

Our second trend is the need for sales teams to move away from template based messaging, and lean into AI prompt engineering to scale their outreach.

Historically sales teams have been reliant on templates to be relevant at scale with their audience, but templates are riddled with habits and bias. Instead, AI prompts generate fresh messages every time in less time using insights and data.

AI in Action

Smartling's salesforce has leaned into AI prompts. They are pre-storing personas & custom prompts to help generate personalized messages in seconds for their sales reps. Now at the click of a button their reps have an email written that is on brand, relevant, and adheres to best practices as set by the business. This task would normally take reps 10 minutes, and it's reduced to 10 seconds.

The payoff? Smartling produces higher quality emails while maintaining their outbound volume required to hit activity goals. 72% of all prospecting emails sent by their sales team are personalized with an average creation time under 1 minute.

LEARN MORE

[About Smartling's success with AI](#)



Trend Three – From Content Generation to Task Execution

The third and most advanced trend we are noticing in the market is teams using AI to get more of their work done. Generative AI has rapidly graduated beyond just content generation, [as AI based Agents surge in popularity](#).

What are AI Agents you ask? They are a program that can make decisions or perform a service based on its environment, user input and experiences. In other words, task executors.

Agents thrive on repetition by nature, which is what makes them so applicable to sales processes which are riddled with repetitive tasks. Anything from list building and lead prioritization, to content generation and sequence management, Agents are helping sales teams scale their outbound motions beyond the headcount they have today.

Agents can be used for autonomously prospecting into various audiences, such as:

Cold outbound Identifying cold ICP prospects and engaging them with emails, calls and social touches	LinkedIn engagement Creating LinkedIn connection and InMail messages for target buyers	ABM multi-threading Discovering new prospects within key accounts to assist with multi-threading
Inbound lead response Setting the engagement and qualification rules to automate timely lead follow-up	Outbound on inbound Keeping prospects warm who have come through a lower intent content channel	Customer expansion Converting free and larger customers to cross-sell and upsell opportunities
Unworked leads Engaging the backlog of leads in reps names that remain untouched		
Sales nurture Creating tailored, personalized nurtures for each person in your database who isn't yet ready to talk to a rep		

What used to require many humans and weeks to launch a sales campaign can now be done autonomously and consistently with AI, allowing humans to repurpose that time on higher value activities:



AI in Action

While AI sales assistants produce productivity gains, AI Agents drive tangible business ROI.

For instance, in our first month of using Agents to prospect into segments of our market that our SDR team wasn't prioritizing, Agents:

- sourced 9,000 ICP leads not in our CRM and contacted them
- drove a 30% lift in meeting production for our reps
- created over \$1M in pipeline

LEARN MORE

[About AI Agents
for sales teams](#)



"The opportunity that Generative AI presents for revenue teams is incredibly exciting. We took something that was out of the question – generate contextually relevant sales content at scale and deliver it to buyers at the right moment in time – and made it possible. To say we're in a transformational moment would be an understatement."



Srinath Sridhar

CEO & Co-Founder, Regie.ai
Former Software Engineer, Meta + Google
Ph.D., Carnegie Mellon University

AI to the Rescue

Remember those top four challenges blocking outbound sourced revenue success? You guessed it. They are now 100% solved with AI.

Go to market teams can lean into these trends and use GenAI to:

1. Understand successful audiences to sell into and automatically source those accounts and leads without revops reliance
2. Unify and simplify a revtech stack to make better decisions on behalf of its users and maximize ROI
3. Understand the optimal channels and touch patterns that yield highest engagement levels, so no two buyers receive the same experience
4. Make reps happier as they only spend time working leads that are engaged and actually want to hear from them

"No matter where in your AI journey you are, Generative AI can change the operational, execution, and experience side of prospecting, making it more scalable for businesses and better for buyers."



Matt Millen

*President & Co-Founder, Regie.ai
Former SVP, Revenue, Outreach.io
Former Chief Growth Officer, Sapper Consulting*

In Conclusion, We Ride at Dawn

The way we see it, there's no sense in turning back: AI is here to stay – and every sales organization needs to play.

We understand that the pace of change has been overwhelming and there are so many tools and innovations that have seemingly popped up overnight. It's dizzying.

The key for sales teams right now is to build a baseline of AI knowledge and then join forces with a partner that has true expertise in both Generative AI *and* sales workflows.

With a Generative AI platform enabling you and your team to increase the scale, consistency and impact of your prospecting efforts, you'll never want to go back to the pre-AI days.

Your major moment awaits.

"The go-to-market team at Amplitude has fully embraced Generative AI, not as a fleeting fad, but as a powerful ally in our pursuit of delivering real value to our customers, our business, and for our brand."



Jessica Arnold

VP Global Sales Development, Amplitude

Founding Partner, 20SALES

Former Sr. Director of North America Inside Sales, Dropbox

The Human Minds Behind This AI Guide

Our mission at Regie.ai is to change the operational, execution, and experiential side of prospecting.

We have built the only Generative AI platform for enterprise sales teams that automates the repetitive parts of the prospecting workflow, making it easier for businesses to sell and better for buyers to engage.

We've been doing AI since before AI was cool.

If you're interested in learning more about how Generative AI could support your sales efforts, we'd love to talk – human to human.

[Contact us](#)