



Generative AI for B2B Sales

The Official Guide



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Foreward

Welcome: A Major Moment Has Arrived

Generative AI – artificial intelligence that can generate text or other content based on human prompts – has 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 all have a front row seat to another defining moment in time for sales technology.

Thanks to AI, salespeople of all career levels can now craft compelling, personalized messages that pique interest and get responses. It also gives leaders of sales organizations a new way to propel their teams forward to achieve ever-increasing quotas in a complex global economic landscape.

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 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 Evolution of Sales Messaging

Lars is right. Sales technology is having a major moment thanks to Generative AI. But to understand where we are headed with these exciting advancements, it's important to understand the road traveled to get here.

Advances in technology are often a double-edged sword; they provide solutions to very real challenges but also expose new areas which need attention. For example, the development of sales technology has been incredibly powerful for meeting buyers where they are, yet it's constantly being met with further innovation spawned by the inherent limitations of technology.

Let's use the evolution of technology and its impact on sales messaging, for instance.

What began as 1:Many messaging, unlocked by the advancements of telemarketing and mass emailing, allowed sellers to reach far more people than their previous field-oriented roles ever allowed for. But what got compromised by this technological advancement in the 1980s was the relationship-oriented nature of the door-to-door salesperson era.

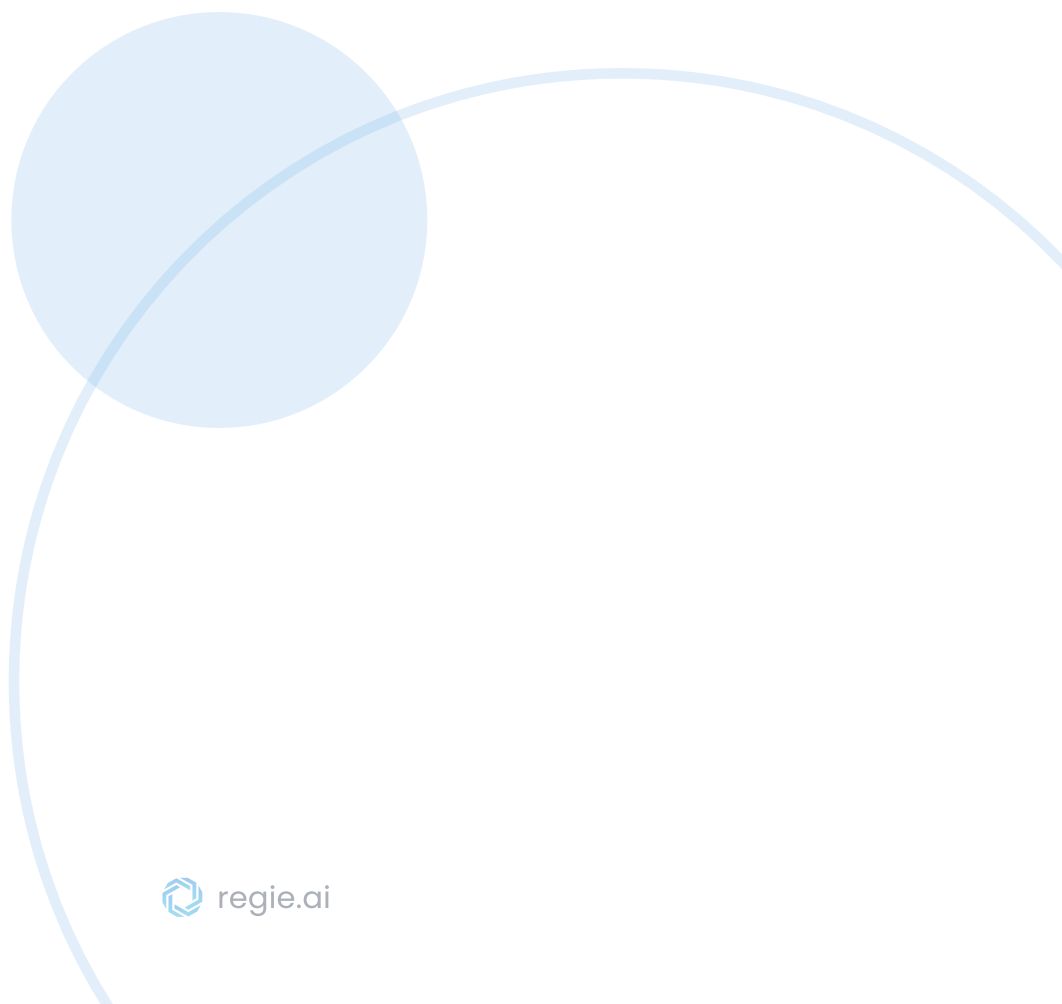
Problem meets solution.

Flash forward to the early 2010s, with the advent of sales engagement platforms like Salesloft and Outreach. Suddenly sales messaging graduated to 1:Few as sellers could reach large groups of people with templated, persona-based messaging that started to get more specific to their audience. However, as we turned up the dial on reach, we sacrificed personalization even further in the process.

Today, Generative AI has finally normalized the trendlines between scalability and personalization. We now live in a tech-forward world where sellers can capture personalized research on a buyer at the click of a button, and use those insights to instantly generate contextual, personalized outreach. This new 1:YOU buying experience is pretty remarkable and has been a long time coming.

This guide maps out areas of your sales workflows that stand the chance to be reimagined thanks to the advent 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?



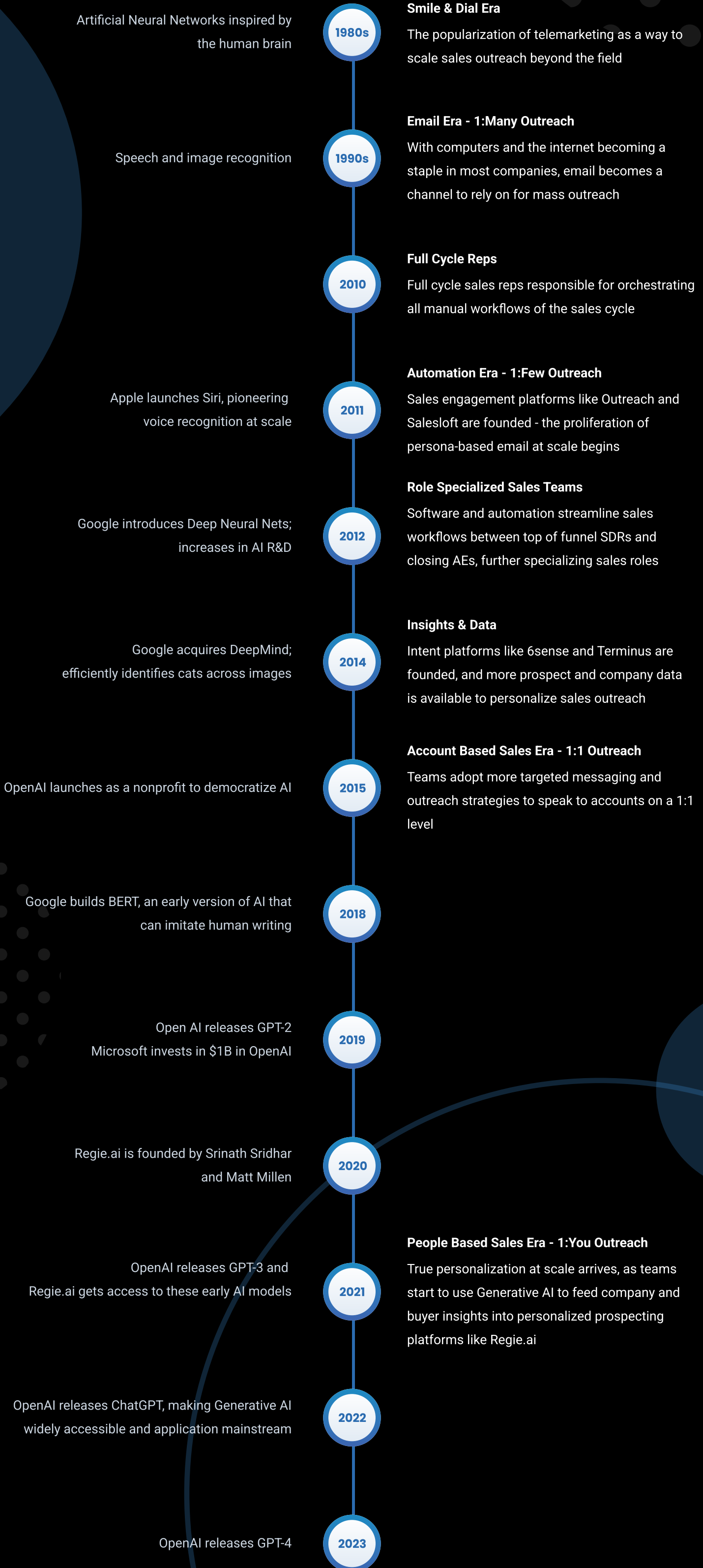
How did we get here?

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

Before we jump into what's possible with Generative AI today, let's review a brief history of this increasingly powerful technology in relation to the evolution of sales outreach and messaging.

AI Advancements

Evolution of Sales



There's Nothing Artificial About It

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

While it's been evolving since the 1980s, AI is exploding in popularity today because of the real-world applicability that newer tools can offer. In recent years, people have expanded the use cases that AI can solve, with a seemingly endless list of AI-powered tools that range from general-purpose to use case-specific. In our case, we're pushing the AI envelope at Regie.ai to solve the challenges that sales teams face every day.

We know that when it comes to B2B sales, there is nothing artificial about the need for higher engagement or the importance of personalized messaging. But what has always stood in the way of sales pros operating at the highest levels of productivity and personalization? It usually comes down to three things: time, skills, and scalability.

Enter: sales-focused Generative AI. It's our belief that when sales teams can execute faster, boost needed skills, and operate on a consistently personal level, they're in the best possible position to succeed. So, that's why we set out to crack the code on how to apply AI in a way that complements sales workflows and supercharges results.

AI isn't just an opportunity for sales teams—it's an imperative.

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. So, the time truly is now to explore the solutions that are best positioned to support your needs and workflows. 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-supported selling.

“The opportunity that Generative AI presents for revenue teams is incredibly exciting. We took something that was out of the question – having a computer generate intelligent, contextually relevant sales content at scale – 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*

Two Truths and a Lie About Generative AI

Generative AI will quickly become a non-negotiable in B2B sales.

TRUTH!

The age of AI has arrived, and this is one of the fastest-moving innovations in B2B sales that we've ever seen. Before long, Generative AI will be a table-stakes solution in a go-to-market tech stack, so the time is now to get comfortable with (and excited about!) AI-supported selling.

Generative AI does all the work for you, so you can just kick back and watch the meetings roll in.

LIE!

Your role as a human sales pro is just as critical as it was before Generative AI exploded on the sales scene. Generative AI can be an incredibly powerful tool for sales professionals, but it won't replace people.

Generative AI has the potential to bring out the best in sellers.

TRUTH!

If you learn to harness the power of a sales-focused Generative AI platform, it has the potential to make you and your team shine. With the explosion of AI tools today, it may feel challenging to choose the right solution. Make sure you find a platform that was designed with the sales use case and workflows in mind.

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.

Messaging has become exponentially better thanks to AI. Its ability to aggregate relevant data points on the company and buyer to deliver contextual and personalized outreach is bringing heightened levels of productivity to front-line teams. Companies using AI are seeing drastic improvement in their messaging engagement rates, further separating their performance from teams not using it.

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 a variety of areas where Generative AI is a must-have addition to your sales function.

And as you explore different ways to use Generative AI in your sales workflows, don't forget this: there's a reason we've always called AI an "assistant." Generative AI is incredibly powerful, and when used properly, can solve a wide array of sales challenges. But you're still the main character here. AI is meant to augment and complement humans, not steal their 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

Research Eating Up Your Time?

Let's face it: when you're responsible for sales metrics and you thrive on making deals, the last thing you want is to spend your whole day on research.

At the same time, the intel and context you can gather through research can mean the difference between booking a meeting with a well-personalized email or being sent to spam.

You know research is critical, but you hate that it eats up so much time as a sales rep. If this sounds like you, Generative AI is about to become your new best friend.

Used as a sales research aide, Generative AI can dramatically speed up the time it takes to gather insights about your accounts and contacts.

Imagine putting just a few bullet points into a system and within seconds, having a strong grasp of what's important to know about the people and businesses you're hoping to reach.

With Generative AI, you can save tons of time on the research aspect of selling, meaning you can pour more energy into strengthening relationships and wowing your prospects; things humans are designed to be great at.

Regie.ai to the Rescue

Our Generative AI platform was created with sales teams and sales workflows in mind. Try utilizing the [Regie.ai Chrome extension](#), which will pull in dozens of data points to use in your research, like Twitter and LinkedIn feeds, articles, company details, podcast features, and more.

Personalization Taking Forever?

In a recent study, our partners at Salesloft found that by sending sales emails that are just 20% personalized, open rates increased over 40% and reply rates increased 112% on average.

Taken a step further, McKinsey & Company research shows that companies prioritizing personalization tend to grow faster than others. In a 2021 study, they found that high-growth companies were earning 40% more revenue from personalized tactics vs. their lower-growth peers.

By now you might be saying, “OK, I know personalization works, but it’s so time-consuming and hard to scale.” To that, we’d say: personalization was time-consuming and hard to scale. Until now.

Used as a personalization assistant, Generative AI can create unique, contextual sales messages faster than you can say “Goodbye spray-and-pray email blasts.”

Imagine being able to streamline your 3x3 research and personalization workflow down to 3x30 seconds. And imagine how this could translate into better open rates, reply rates, and opportunity creation. Generative AI is finally making scalable personalization possible.

“Today, your prospects are looking for personalized, relevant, and contextual messaging – and the latest advancements in AI are making it possible to personalize at scale, in seconds.”



Matt Millen

President & Co-Founder, Regie.ai

Former SVP, Revenue, Outreach.io

Former Chief Growth Officer, Sapper Consulting

Sequence-Writing A Burden?

If you own sequence creation in your organization, but don't particularly enjoy writing, you are not alone. Here at Regie.ai, we've met countless sales, ops, and enablement team members who often dread tasks like sequence creation.

Traditionally sequence creation was dreaded because it was time intensive to create, subject to a variety of opinions and preferences on what works and what doesn't, and then once finalized, took time to build out in a sales engagement platform.

The problem is, writing is a necessary part of sales, so there's no getting around it.

Or is there...?

Used as a writing tool, Generative AI can instantly turn your standardized personas, pain points and value props into contextual sales sequences informed by performant data and best practices that can be published directly into your sales engagement platform.

Imagine being able to generate a first draft of a sequence in minutes, not days, without having to add anything more than a couple of prompts into a platform. And if the *first* first draft doesn't come out exactly how you wanted, all it takes is a click of a button to generate new options to work with and share with internal teammates for collaboration and finalization.

I don't know about you, but we'd much rather be in the content editor seat, than the content creator seat every time we go to prospect.

Plus, there's a secret added benefit beyond saving time and stress associated with your writing. As you continue using Generative AI to create sequences, you'll be constantly learning from the system about what makes for a high-performing touch pattern. So, the next time you find yourself faced with having to write persona-based sequences, you'll have a stronger foundation, with a ton of data points and industry best practices, to build from.

Meetings Not Filling Your Calendar?

B2B sales success requires connection and relationship-building, and the key to making it all happen is by diversifying your outreach across multiple channels to secure meetings. According to research performed by Salesloft reaching out across three-plus channels can increase prospect engagement by a whopping 175%.

Whether you are comfortable navigating a variety of outbound channels, like email, phone and social media, or tend to index on one, Generative AI can help ensure you are providing the right message no matter the channel.

Making cold calls?

Generative AI platforms can surface communication preferences, such as communication advice and personality DISC and OCEAN profiles to make recommendations on communication best practices.

Writing cold emails?

Generative AI platforms can analyze and make recommendations for emails in real-time, ensuring you are optimizing for things like email length, readability, spam words, inclusive language and more.

Leveraging social selling?

Generative AI platforms can aggregate digital breadcrumbs on the prospect, including data points from their feed, articles, podcasts, recent job posts and more, to generate hyper-personalized outreach on platforms like LinkedIn.

How would your calendar look if you had optimized touch points across a variety of channels?

Burnout Threatening Your Team?

If you're early in your sales career, or if you've got experience managing a team of reps, the threat of burnout probably feels all too familiar.

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 also incredibly FUN to use! AI is a magical experience that can breathe newfound levels of joy into the sales profession; the perfect counterpoint to burnout.

Used as a productivity and skills-boosting tool, Generative AI enables sales development teams to improve results and build confidence – which in turn will help to lessen stress and prevent burnout.

Imagine seeing your team's skills and confidence grow as they see their efforts paying off with higher open rates, replies, and meetings booked. 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*

Career Growth Feeling Elusive?

Sales professionals tend to be an ambitious bunch – you thrive on that zing of a win, after all. That winning attitude doesn't stop at prospecting and opportunity creation; sales pros' ambitious nature relates to career growth, too.

Sometimes, it can feel like career growth is a tough mountain to climb, or that you need something special to stand out among your peers. Gaining early experience, expertise, and results with sales-focused Generative AI solutions could be a career-shaping advantage.

We're calling it now: before long, hiring managers and sales job postings will be asking candidates to demonstrate experience in scaling processes and approaches with Generative AI.

Used as a way to gain valuable experience, Generative AI offers ambitious sales professionals an opportunity to become early adopters of technology that will define the next era of B2B sales methodology.

Imagine having a first-mover advantage with a secret sales superpower and seeing a huge boost in your results.

"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

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 productivity and personalize sales messaging at scale, you'll never want to go back to the pre-AI days.

Your major moment awaits.

“Embrace the potential of Generative AI, not as a fleeting fad, but as a powerful ally in your pursuit of delivering real value to your business, your brand, and the people you serve.”



Greg Verdino

Business Futurist & Keynote Speaker, gregverdino.com

Co-Host, No Brainer: An AI Podcast

Author, Never Normal

The Human Minds Behind This AI Guide

Our goal at Regie.ai is to unlock more buyer conversations through personalization, at point and at scale. We have built the only Generative AI platform for enterprise sales teams that personalizes content using data that is unique to your business and your buyers.

Our Generative AI platform was designed exclusively for B2B sales teams' needs. (This isn't all-purpose AI!) Our platform works seamlessly with your sales and marketing workflows so you can personalize at scale, win with prospects, and grow your career.

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.