



Professional & Executive Development

HARVARD DIVISION OF CONTINUING EDUCATION



Strategic Sales Management

Michael McCarthy, John Westman, & Cherilynn Castleman • August 5, 6, 2025

Pre-Session AI Office Hours



Set-up An Account

- **1. Go to the ChatGPT website** <https://chat.openai.com>
- **2. Create an account.** Click **Sign Up**.
- **3. Verify your email**
- **4. Enter your name and birthday**
- **5. Verify your phone number:** You'll receive a text with a code. Enter it to complete setup

Takes 2-5 Minutes



Prompt:

*Write a very short story about a woman who
sells_____ (Your Product)_____*

A **prompt** is the instruction, question, or request you give to an AI Powered tool to tell it what you want it to do.

Think of it like:

- Asking a colleague for **help**, the clearer you are, the better they can help.
- Giving a chef a **recipe**, the more specific your instructions, the closer you'll get to the dish you want.



Prompt Like a Pro with GIFT + POV

Prompt Like a Pro: The GIFT Framework

G – Goal: What do you want AI to create or solve?

I – Intent/Audience: Who's the message for and what do they care about?

F – Format: What output do you want (email, script, summary)?

T – Tone: What voice or style (confident, casual, consultative)?

Triangulated POV: Build Insight with AI

Industry: What are the 3 key trends shaping this space?

Company: What's the strategic focus in their Form 10-K or CEO letter?

Person: What matters most to your buyer based on their LinkedIn or interviews?

When to Use

- Pre-call planning
- Cold outreach
- Strategic messaging and QBRs



Pro Tip: Before every call or outreach, ask AI to help you form a POV—not just a pitch.



Resources

<https://cherilynnncastleman.com/nsn/>

Visit this link to download all session materials.

- **NSN –Strategic Sales Management Agent:** All Harvard handouts / Pre-reading material
- **Social Proof Agent:** LinkedIn Profile Optimization and Social Proof Strategy
- **AI Fluency Resources:** Assessment, AI Team Activities
- **LinkedIn Resources:** Check lists, Tips, and Social Proof Overview

Leverage these tools to lead an **AI Fluent Team** using the **30% Rule**, your team must reach at least **30% AI fluency** for you to be considered truly AI Fluent leader





Professional & Executive Development

HARVARD DIVISION OF CONTINUING EDUCATION



Strategic Sales Management

Michael McCarthy, John Westman, & Cherilynn Castleman • August 5, 6, 2025

How Many New AI Tools Launched Per Day?

“AI won’t replace humans—but humans with AI will replace humans without AI.”

-Karim Lakhani, Professor, Harvard Business School



A I F l u e n c y

S.A.I.L. Into The Future™ —..

CLARITY & CONFIDENCE

SKILLS

AAMPLIFY
BRILLIANCE

INSIGHT &
INFRASTRUCTURE

LEADERSHIP



Introducing the S.A.I.L. Framework™

The 30% Rule

The **S.A.I.L.**™ Framework empowers sales leaders to drive AI Fluency with clarity, confidence, and coaching precision.

S – Skills: Equip your team with core AI capabilities including prompt writing, trust-building, and positioning.

A – Amplify Brilliance: Use AI to enhance—not replace—your team’s superpowers through automation and reflection.

I – Insights & Infrastructure: Integrate AI into your full sales rhythm—CRM, pipeline, social proof, and execution.

L – Leadership: Use AI to lead boldly, forecast trends, foster trust, and shape the future of sales culture.



TEST & TWEAK:

A simple way to improve results. Take out a sheet of paper and draw a line down the middle. On one side, list what you want to **test** - new ideas, tools, or approaches.. On the other side, note what you want to **tweak** - small adjustments to make existing strategies work better. This helps you focus on learning and improving step-by-step.



A I F l u e n c y

S.A.I.L. Into The Future™ —..

CLARITY & CONFIDENCE

SKILLS

AAMPLIFY
BRILLIANCE

INSIGHT &
INFRASTRUCTURE

LEADERSHIP



Prompt:

“Write an email to a prospect/client about our product. Mention that it saves money. Add a link”



Prompt Like a Pro with GIFT + POV

Prompt Like a Pro: The GIFT Framework

G – Goal: What do you want AI to create or solve?

I – Intent/Audience: Who's the message for and what do they care about?

F – Format: What output do you want (email, script, summary)?

T – Tone: What voice or style (confident, casual, consultative)?

Triangulated POV: Build Insight with AI

Industry: What are the 3 key trends shaping this space?

Company: What's the strategic focus in their Form 10-K or CEO letter?

Person: What matters most to your buyer based on their LinkedIn or interviews?

When to Use

- Pre-call planning
- Cold outreach
- Strategic messaging and QBRs



Pro Tip: Before every call or outreach, ask AI to help you form a POV—not just a pitch.



Prompt Examples in Action

Strong GIFT Prompt Example:

“Write a concise follow-up email to a healthcare CMO who is expressive, and said budget is tight this quarter. Use a confident tone, highlight the cost savings of our automation solution, and include a link to our MedTech ROI case study.”

Triangulated POV Prompt Example:

“Can you analyze and triangulate insights from:

- the top 3 trends in [industry],
- [Company]’s latest 10-K and CEO Letter,
- and [Person]’s LinkedIn activity or interviews—

to build a hypothesis for how they can improve [goal, e.g., sales efficiency]?”

When to Use These Prompts:

- Pre-call preparation
- Cold outreach messaging
- Executive briefing documents
- Account planning sessions
- Sales enablement and coaching

 Use these examples to inspire prompt libraries across your team.



Topics to Triangulate

- 1. Market & Economic Signals:** Macro trends, economic indicators, or regulatory changes that impact their business
 - AI use: Summarize industry analyst reports, news feeds, and market forecasts in minutes
- 2. Competitive Landscape:** How their competitors are positioning, pricing, or innovating
 - AI use: Compare competitor messaging, LinkedIn hiring trends, and product announcements
- 3. Role-Based Priorities:** The specific KPIs, pressures, and success metrics for their role (e.g., CRO vs. VP of Ops)
 - AI use: Ingest job descriptions, quarterly earnings call transcripts, and LinkedIn posts to map pain points
- 4. Tech Stack & Digital Maturity:** Tools they use, integrations they lack, and their AI adoption stage
 - AI use: Crawl public integrations, case studies, and tech partnerships to infer gaps and opportunities
- 5. Buying Triggers & Events:** Mergers, funding rounds, leadership changes, product launches, geographic expansions
 - AI use: Automate alerts and synthesize impact scenarios
- 6. Relationship Intelligence:** Shared connections, prior vendors, or internal champions
 - AI use: Cross-reference CRM notes, LinkedIn connections, and meeting transcripts
- 7. Cultural & Organizational Signals:** Mission, values, DEI priorities, hiring patterns, Glassdoor sentiment
 - AI use: Summarize public statements, employee reviews, and leadership interviews



A I F l u e n c y

S.A.I.L. Into The Future™ —..

CLARITY & CONFIDENCE

SKILLS

AAMPLIFY
BRILLIANCE

INSIGHT &
INFRASTRUCTURE

LEADERSHIP



Amplify Your Brilliance: AI + You

A = Amplify Brilliance (AI & Automation Mindset)

Identify Your 3 Superpowers

What makes you great—storytelling, empathy, strategy? Pair each with an AI tool or prompt.

15-Minute Morning Reflection

Use prompts like: What can I delegate, automate, or simplify today?

- Eisenhower Matrix: Do, Delay, Delegate, Drop
- Swiss Cheese Method: Break down hard tasks

Model Curiosity

Ask weekly: What did you test or tweak with AI?

Share wins, misses, and new tools with your team. **Teach Me Something in 5 Minutes** (Agenda Item)



Bottom Line: Start small. Reflect daily. Let AI amplify your strengths—not replace them.



A I F l u e n c y

S.A.I.L. Into The Future™ —..

CLARITY & CONFIDENCE

SKILLS

AAMPLIFY
BRILLIANCE

INSIGHT &
INFRASTRUCTURE

LEADERSHIP



Insights & Infrastructure: Smarter Systems, Stronger Selling


I = Insights & Infrastructure

Integrate AI into the full sales Funnel—CRM, email, LinkedIn, pipeline, content tools.

Treat AI as a thinking partner, not a separate tool.

Use it to: Summarize calls, Personalize outreach, Forecast risk, and Generate proposals

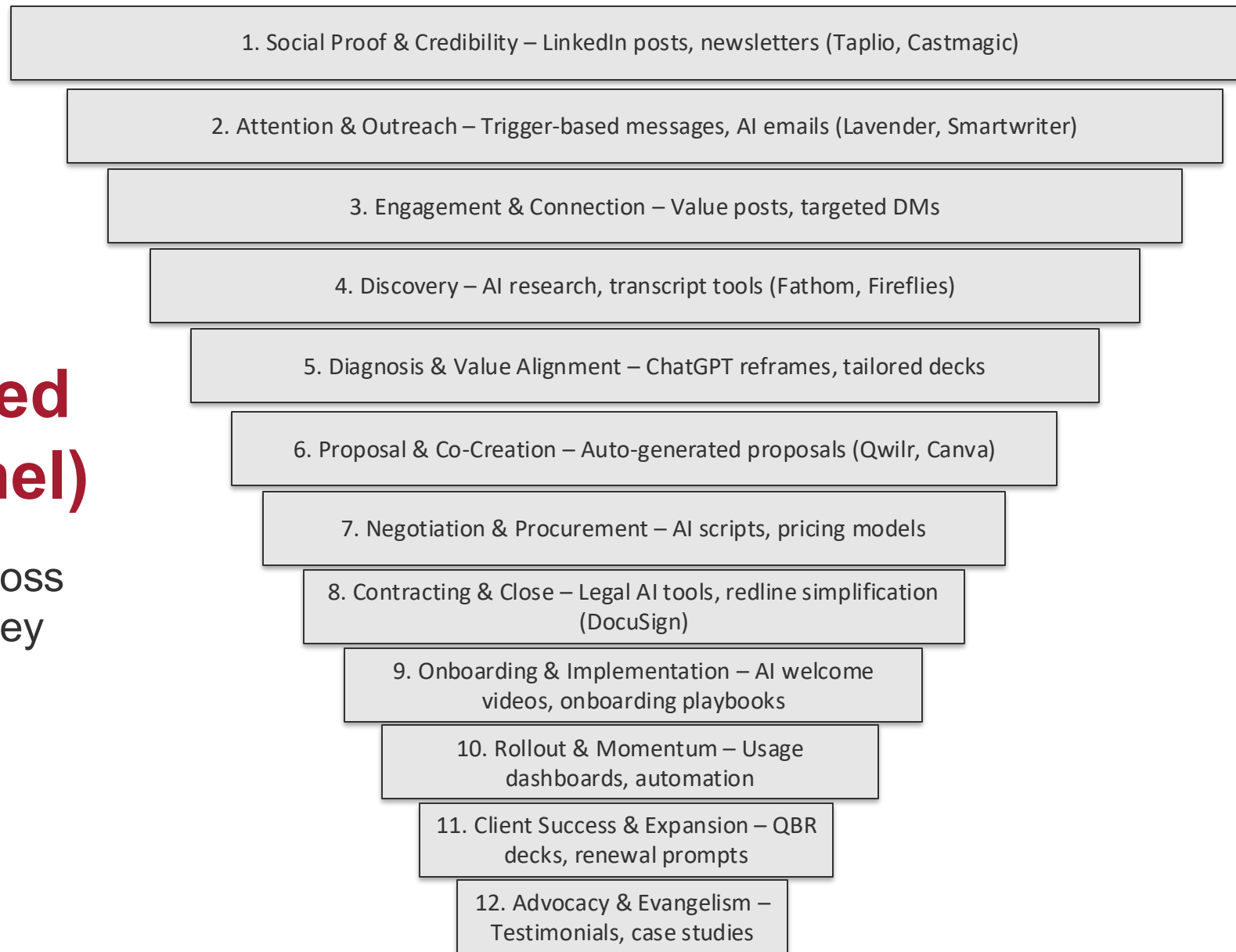
AI embedded in infrastructure improves speed, consistency, and strategy.

 **Action Step:** Pick the weakest funnel stage. Use AI to improve it this week.
Kickoff Prompt: “Here’s how my current sales process looks: [list]. Where am I losing time or repeating manual work?”



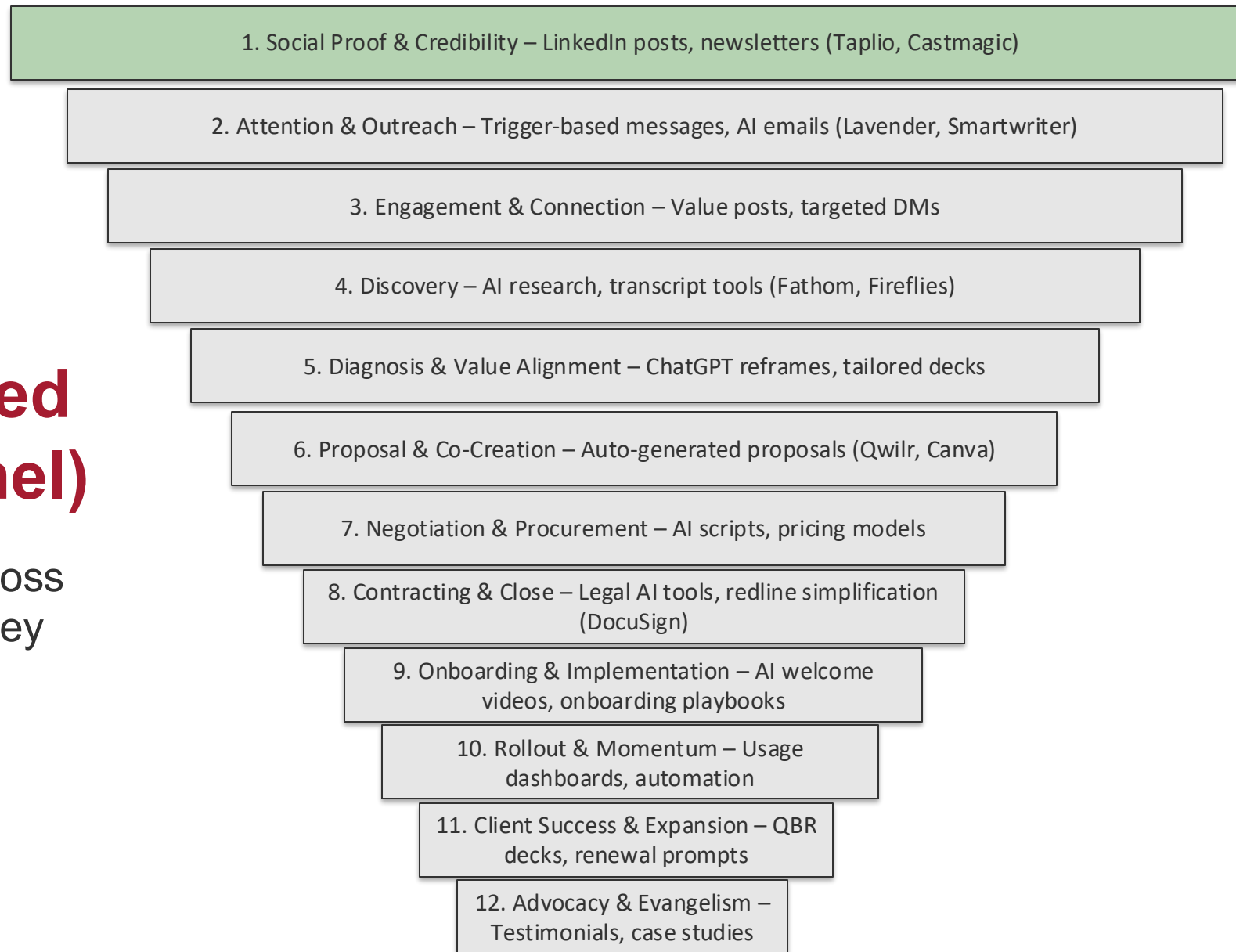
AI-Integrated Sales Funnel)

Where AI Fits Across the Buyer Journey



AI-Integrated Sales Funnel)

Where AI Fits Across the Buyer Journey



You don't need to go Viral,
you just need to be Visible



Profile Basics

- ☐ Customize your LinkedIn URL
- ☐ Upload a high-quality, professional headshot
- ☐ Add complete contact info (email, website, etc.)
- ☐ Activate the name pronunciation feature (mobile app only)

Visual & Brand Presence

- ☐ Use a banner image aligned with your brand or CTA
- ☐ Leverage the Featured section with media (case studies, videos, etc.)

Messaging & Value

- ☐ Write a headline that communicates how you help (not just a title)
- ☐ Optimize your About section with:
 - Who you help and what problems you solve
 - Your insights and vendor-neutral advice
 - Your "why" and CTA to connect

Experience & Services

- ☐ Craft narrative-driven Experience entries (avoid bullet points)
- ☐ Add media to highlight success stories
- ☐ Enable and optimize the "Services" page

Content & Engagement

- ☐ Post regularly with insights, stories, and sales tips
- ☐ Celebrate others and engage in community discussions
- ☐ Use strong openings, short paragraphs, and clear CTAs
- ☐ Experiment with short video content to build social proof

Optimize Your LinkedIn Profile for Sales Success



Social Proof: Your Strongest Sales Tool

WHY Social Proof?

- 75% of buyers check your online presence before replying.
- Visibility builds trust. If your value isn't visible, it might as well not exist.
- Social proof is a shortcut to trust in a noisy, high-stakes B2B world.

WHAT Is Social Proof?

- Testimonials, endorsements, media features
- Case studies, podcast appearances, speaker invites
- LinkedIn engagement: posts, comments, shares
- Peer recognition, value-driven insights, digital presence

HOW to Use It Strategically

- Share short stories from client calls, wins, or challenges
- Use LinkedIn carousels, videos, and thoughtful posts
- Build a weekly rhythm: Insight > Win > POV > Engagement
- Activate your team with content calendars and AI prompts

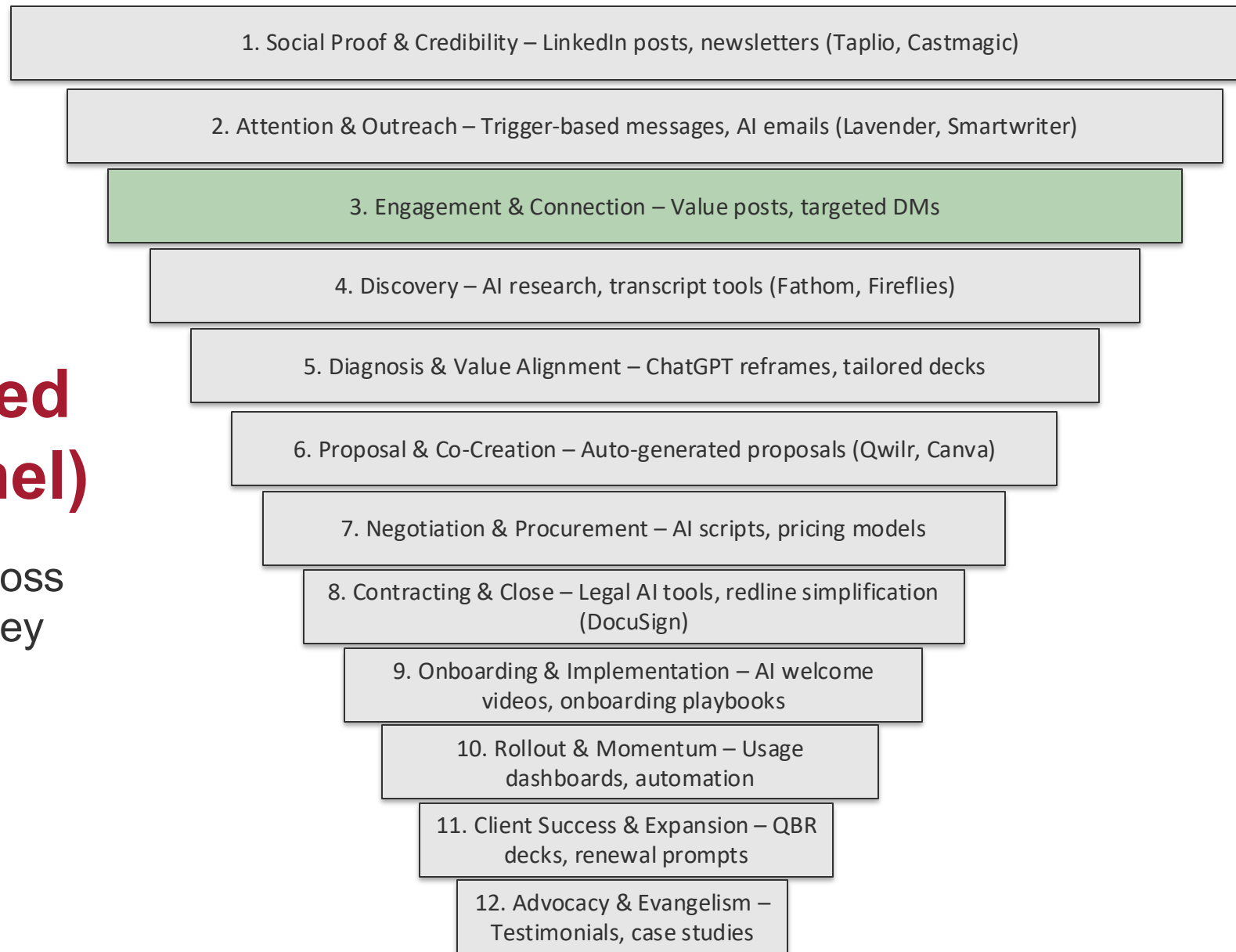


Final Thought: Social proof is not showing off—it's showing up.



AI-Integrated Sales Funnel)

Where AI Fits Across the Buyer Journey



LinkedIn Metrics & Social Proof That Matter

You don't need to go viral—you need to be visible.

- 90% of professionals use LinkedIn job titles like HR forms—buyers don't search that way.
- Profiles with strong headlines and banners are more likely to convert profile views into pipeline.
- Adding contact info makes you 1.8x more likely to be contacted.
- “Open to Work” banner? 85% of recruiters avoid it. Use private settings instead (2.5x more InMails).
- Just 10 minutes of consistent posting or commenting per week makes you 3x more likely to be hired

Social Proof Still Wins:

- Ask for recommendations from clients, peers, and managers
- Highlight value and outcomes (e.g., “Helped 50+ clients close enterprise deals”)
- Update your Skills section with high-visibility keywords



Sales Manager Takeaway:

Coach reps to build strong digital handshakes—headline, photo, banner, and proof—not just resumes.



Company's LinkedIn Content

| PILLAR | REACH | ENGAGEMENT | GROWTH | CONVERSION | FORMATS TO USE |
|----------------------------|-------------|-------------|---------|------------|----------------------------------|
| Personal Stories | strong | exceptional | low | low | Text+Image, Video, Document |
| Thought Leadership | exceptional | average | strong | strong | Text+Image, Video, Articles |
| Industry Insights | average | average | strong | average | Text+Image, Document, Polls |
| Products / Services | minimal | low | average | strong | Video, Document, LinkedIn Live |
| Event Content | average | average | average | average | Video, Text+Image, Document |
| Employer Branding | strong | average | low | average | Text+Image, Video, Document |
| Social Responsibility | low | average | minimal | minimal | Text+Image, Document, Articles |
| Customer Generated Content | strong | average | strong | strong | Video, Document, Text+Image |
| Behind The Scenes | strong | exceptional | low | minimal | Video, LinkedIn Live, Text+Image |

Performance & Format Guide



L = Leadership Leadership: Lead What's Next with AI

Use AI to expand vision, shape strategy, and build high-trust cultures.

3 Core Focus Areas:

- See Around Corners: Forecast trends and prepare before others do
- Build Innovation: Free up mental space to test bold new ideas
- Build Team Culture: Normalize experimentation with rituals like 'AI Wins of the Week'

 **Coaching Prompt:** “What’s one trend I see but haven’t acted on yet?”

Weekly Challenge: Name one signal. Take one bold step. Reinforce one culture habit.



TEST & TWEAK:

What's one thing you will **Test**,
and one thing you will **Tweak**?



Resources

<https://cherilynnncastleman.com/nsn/>

Visit this link to download all session materials.

- **NSN –Strategic Sales Management Agent:** All Harvard handouts / Pre-reading material
- **Social Proof Agent:** LinkedIn Profile Optimization and Social Proof Strategy
- **AI Fluency Resources:** Assessment, AI Team Activities
- **LinkedIn Resources:** Check lists, Tips, and Social Proof Overview

Leverage these tools to lead an **AI Fluent Team** using the **30% Rule**, your team must reach at least **30% AI fluency** for you to be considered truly AI Fluent leader

