I – Insights & Infrastructure: Bake AI Into Your Sales Rhythm

Coaching Handout: Use in Workshops, Team Huddles, or 1:1 Coaching

Why "I" Matters in AI Fluency: Insights & Infrastructure

AI Fluency isn't just about using tools—it's about building smarter systems.
That's why the "I" in the S.A.I.L. Framework stands for **Insights & Infrastructure**.

This pillar is all about integrating AI into your **existing sales workflow**—your CRM, email, LinkedIn, content tools, and pipeline strategy—so that every rep can sell smarter, faster, and more strategically.

When sellers are fluent in this layer, they stop treating AI like a separate tool and start using it as a **thinking partner, pattern detector, and time saver** across the entire sales funnel. Whether it's summarizing discovery calls, forecasting pipeline risk, or generating deal-specific outreach, AI becomes embedded—not added on.

Why It Matters:

- **Saves time on busywork** so reps can focus on high-impact selling
- **Improves consistency and personalization** across every stage of the funnel
- **Connects your systems and data** for faster decision-making
- **Enables a test-and-tweak culture** where continuous improvement becomes the norm

When AI lives inside your infrastructure—not just beside it—fluency becomes second nature.

Action Step: Identify the weakest phase of your sales funnel—prospecting, discovery, or follow-up. Use AI to improve that step this week (e.g., draft personalized emails, summarize client calls, or prep competitive intel). Then test and tweak your approach weekly to refine what works and scale what sticks.

Kickoff Prompt: "AI-Assist My Sales Funnel"

"Here's how my current sales process looks: [list your typical funnel steps].
Where am I losing the most time, missing opportunities, or repeating manual work?
What AI tools, prompts, or workflows could streamline or strengthen that step?"

🔧 **Getting Started Exercise: "One Funnel Fix"**

Step 1: Pick the weakest or most time-consuming stage in your funnel (e.g., discovery, proposal, or follow-up).

Step 2: Write out 2–3 things you *currently* do manually at that stage.

Step 3: Ask ChatGPT:

"Here's what I do during [stage]. How can I use AI to speed this up, personalize better, or improve outcomes?"

Step 4: Try one suggestion this week.

Step 5: End the week by reflecting: *Did it save time? Improve quality? What should I tweak?*

The chart below outlines how to integrate AI across the modern sales cycle.

Sales Funnel Stage	Goal	AI Applications
1. Social Proof & Credibility	Build trust before outreach.	LinkedIn posts, newsletters, case studies (Taplio, Jasper, Castmagic)
2. Attention & Outreach	Cut through noise to earn attention.	AI-personalized emails, trigger-based messaging (Lavender, Smartwriter)
3. Engagement & Connection	Earn the right to a discovery call.	Nurture with value posts, targeted DMs
4. Discovery	Understand goals and gaps.	Pre-call AI research, transcript tools (Fathom, Fireflies)
5. Diagnosis & Value Alignment	Align solution to strategic goals.	ChatGPT for insight reframe, value slides
6. Proposal & Co-Creation	Build a plan with buyer input.	Auto-generated decks, tiered proposals (Qwilr, Canva Docs)
7. Negotiation & Procurement	De-risk decision and handle objections.	AI scripts, pricing models, redline simplification
8. Contracting & Close	Make the decision easy to sign.	E-sign, legal AI simplification (DocuSign, PandaDoc)
9. Onboarding & Implementation	Deliver a seamless transition.	Onboarding trackers, AI welcome videos
10. Rollout & Momentum	Scale adoption and impact.	Usage dashboards, automated win stories
11. Client Success & Expansion	Turn value into upsell.	QBR decks, usage tracking, expansion prompts
12. Advocacy & Evangelism	Turn clients into champions.	AI-generated testimonials, branded case studies