

Smart Guide to AI in Sales and Lead Gen



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Introduction to Artificial Intelligence

Thanks to decades of sci-fi and pop cultural references, any mention of AI can easily conjure images of cyborgs walking the earth. (Or, maybe you can't help but hear the Terminator saying, "Hasta la vista, baby.")

So, what is AI really?

Actual AI, though, is at once both much bigger than that and much simpler.

Here's the best definition for our money, courtesy of Google DeepMind CEO, Demis Hassabis:

"AI is the science of making machines smart."

When you put it that way, it helps to cut through some of the haziness created by all the AI-related buzz out there.

Yes, AI can lead to action-hero robots that ride motorcycles. But at its core, the field of AI is simply focused on making machines—the tools we humans use to make, do, and understand things—smarter and more effective.

Again, yes, it can get much more complex than that. (There's a reason many of the field's leading minds have one or more PhDs.) But if you're trying to understand the basics of AI and learn how it can be applied to sales and marketing, this is a great place to start.

At the end of the day, AI is about making better tools—tools that can make sales and lead gen teams more efficient, more productive, and more profitable.

What about conversational AI?

If you lead a sales or lead generation team, you've probably heard "conversational AI" thrown out among all the other buzzwords and jargon. And for good reason: conversational AI is among the most promising technologies for sales and marketing organizations. But what exactly is it?

Conversational AI refers to a specific type or subset of AI technology that's designed to understand, process, and respond to human language. In other words, the machines that we're making smarter in AI are specifically getting better at language-related tasks.

Even more specifically, the primary goal of conversational AI is to get computers to interact with humans in a natural and contextually appropriate (i.e., conversational) manner.

And get this: *it's working*.

As conversational AI tech has continued to advance, computer programs have become more and more capable of understanding and conducting complex conversations. Conversational AI is getting better and better at grasping all the nuances of human language: its sarcasm, its humor, its idioms, and its angry customers included.

So why should you, a sales or marketing professional, care?

First off, you have to admit: it's pretty cool, right?

But secondly, and way more importantly, this technology has incredible potential, now and in the future. Because conversational AI can add value in any field where conversations are key to day-to-day operations...Did somebody say sales and lead gen?

Your Guide to Acronyms from AI to Z

AI

Artificial Intelligence: AI is a branch of computer science that focuses on creating machines that can mimic human intelligence. This can include tasks like learning from experience, understanding language, recognizing patterns, and making decisions.

AGI

Artificial General Intelligence: AGI, also known as “strong AI,” refers to a type of artificial intelligence that has the ability to understand, learn, and apply its intelligence to any intellectual task that a human being can.

DL

Deep Learning: a specific machine learning technique that teaches a computer to learn in a way that mimics the human brain. Multiple layers of neural networks process unstructured data in order to

LLM

Large Language Model: LLM refers to machine learning models that have been trained on extensive amounts of text data. These models are capable of generating human-like text based on the patterns and structures they learned from the training data.

ML

Machine Learning: ML is a method of data analysis that automates the building of analytical models. It's a branch of artificial intelligence based on the idea that systems can learn from data, identify patterns, and make decisions with minimal human intervention.

NLP

Natural Language Processing: NLP is a field of AI that enables computers to understand, interpret, and generate human language. It combines computational linguistics and machine learning to allow systems to analyze, understand, and respond to human text or voice inputs.

NLG

Natural Language Generation: NLG is a subset of NLP that focuses on generating natural language text or speech from a dataset. It enables machines to create human-like content, such as writing a news report or a text response in a conversation.

NLU

Natural Language Understanding: NLU is also a branch of NLP, which is focused on machine reading comprehension. It goes beyond processing and understanding the literal meaning of text, allowing systems to interpret context, make inferences, and recognize implied meanings.

NN

Neural Networks: NN are a set of algorithms modeled after the human brain, designed to recognize patterns in data. They interpret sensory data through a kind of machine perception, labeling or clustering raw input, making them key to machine learning tasks like object recognition or speech recognition in artificial intelligence.

Innovating All the Way Through the Pipeline: AI in Sales and Lead Gen

In a world where sales and lead generation have become increasingly driven by data and more advanced technology, it's hardly surprising that artificial intelligence is emerging as an indispensable asset.

Still, the accelerated pace of AI's advancement has caught many sales leaders off guard. The main question raised by the disruptive technology is no longer necessarily why, but how to use AI.

It's a question that, already in 2023, has many potential answers. Because AI is now driving innovations and new efficiencies across the entire sales pipeline:



Lead Generation

Getting enough quality leads in the pipeline is the top priority for the vast majority of marketers. (As many as 91%, according to one survey.) But we don't need to tell you twice that it's no simple task.

When generating leads is costing most businesses more than half of their entire marketing budgets, everybody's going to be in search of solutions to do it more effectively and efficiently.

AI is attacking this issue from all angles, from generative AI-supported content to conversational AI-powered outreach over voice, text, email, and chat.



Lead Scoring and Segmentation

Too many organizations simply don't know enough about their leads. And without the ability to segment their leads and prioritize them accordingly, they're wasting agent time and leaving sales on the table.

The average lead scoring model considers at least 15 to 20 different factors. That means you can't just stare at your lead data long enough and hope to come up with the right approach.

It does, however, mean that AI is well-suited to speed things up and deliver insights previously unrealized. And with a much clearer picture of which leads to focus more of their efforts on, sales teams are reaping the benefits.



Contact

Today's AI solutions are nowhere near taking over the entire sales process themselves. That much is for sure.

But as we covered in Chapter 1, they're still plenty handy—maybe more than you already know—at holding and understanding complex conversations. Sales teams and lead generators can either deploy virtual agent software to automate routine conversations, or they can use AI to analyze and help improve the most critical aspects of agents' conversations.



Scheduling

Setting sales appointments is among sales' most-necessary necessary evils. Finding the right time to talk to somebody can be time-consuming for agents; it can also be tedious for prospects.

However, when 42% of people are more likely to make a purchase when a sales rep calls back at an agreed-upon, specified time, you need to have a way to efficiently get things on the calendar.

AI has this segment of the sales journey covered, too. Whether with a specialized scheduling tool or an intelligent virtual agent (which we dive into later), your team can streamline the process, eliminate headaches for customers and agents, and move on toward closing a deal.



Closing

Today's leads expect personalized sales experiences that cater to their particular needs. The companies that deliver are the ones driving growth. Indeed, companies that grow faster drive 40 percent more of their revenue from personalization than their slower-growing counterparts.

Much like with lead scoring, machine learning's number-crunching abilities make it the perfect personalization engine. Technology is emerging that can support your team's ability to offer more personalized everything—all the way from product demos to final contracts.

AI's Innovations Across the Sales Pipeline



SOLUTION SPOTLIGHT

Generative AI Tools

Generative AI (or gen AI) is technology that, like the recent mainstay in the headlines, ChatGPT, utilizes algorithms to generate new content—writing, images, and audio—based on the data it's trained on.

Generative AI may have just burst onto the scene, but it's already a difference-maker for sales and lead gen teams.

How can you put it to use? Fire up a gen AI tool like ChatGPT or Google's Bard and try out these potential use cases:

- 💡 **Get help developing outbound sales scripts or messaging template**
- 💡 **Quickly write more blog post drafts, targeted emails, and social posts to help generate leads**
- 💡 **Better understand your competitors**
- 💡 **Role-play with an imaginary prospect**

How AI Doesn't Replace Sales Agents—It Empowers Them

Bring up AI among sales teams and there's a burning question that comes up often:

Will AI replace my job?

The short answer:

No, not for the foreseeable future.

The longer answer:

AI technology isn't taking over the still-vital overall role played by real, live human reps and managers. But it is capable of playing a more prominent role.

So, while AI solutions may be taking over certain aspects of sales and lead gen operations, they're not replacing human agents wholesale.

Rather than replace agents, emerging AI solutions are making it possible for agents to do more—and do more of the work they want to do.

Here's how:



AI saves time

You know that working as a sales rep or lead generator can at times be tedious and repetitive. But do you know what agents are actually spending their time on? (And what leaders are spending their payroll on?)

The answer, most of the time, is not closing sales. One study found that two-thirds of sales reps' time is spent on things other than selling.

With AI on their side, teams can eliminate dull manual processes, create new efficiencies, and allow agents to focus more on generating and converting leads.



AI can make agents more effective

It's not all about efficiency and eliminating unnecessary time-sinks, though. AI can bring out the best in your agents by:

- Supporting a more personalized sales process with data processing and analytics
- Analyzing speech to help agents adjust their approach on the fly
- Speeding up feedback development and delivery



AI can improve agents' skills and advance their careers

By streamlining feedback delivery and making it easier to make improvements, it's not just your sales numbers that will improve but your team members themselves.

Meanwhile, freeing up agents to focus more on sales and strategy can empower them to step beyond their role as representatives.



AI improves agent engagement and satisfaction

All these benefits add up to a more motivated, engaged, and satisfied workforce—something every sales and lead gen should be striving for in the face of widespread burnout.

And, as we'll explore in a later chapter, this positive feedback loop serves as the foundation for much more than that.

Building on efficiency, empowerment, and improvement, sales and lead gen teams can leverage AI to create a culture of innovation—and a business designed to achieve scale.

SOLUTION SPOTLIGHT

AI-Powered QA Tools

Consider this: we often talk about how important QA is. But for as long as we can remember, actually analyzing the contents and outcomes of every call has been a difficult, if not impossible, task.

If you're a large contact center, the norm has long been that some of your agents sometimes have some of their calls analyzed. Luckily, conversational AI-driven QA tools can change all that.

AI-based QA Software Capabilities:

With just a simple integration in your outbound dialer, QA solutions can:

- 💡 Listen in on every call
- 💡 Deliver post-call analytics straight to the agent
- 💡 Streamline the process of providing coaching and feedback
- 💡 Empower QA teams to uncover deeper insights and offer more improvements
- 💡 Even provide on-call guidance to sales agents in real time

With the total transparency afforded by these tools, your QA team can be more effective than ever before—and help drive better outcomes across your organization.

Virtual Agent Software Revolutionizes Outreach

You've learned just how AI can help your agents perform better. But what if you could also put AI to work as another agent entirely? What if you could delegate lower-level tasks to an AI-based agent that's fully equipped to qualify leads, schedule appointments, and set your reps up for success?

This is the promise of intelligent virtual agent (IVA) software.

What is IVA software?

If AI QA software offers teams improved *conversational intelligence*, IVA offers them *AI-driven conversations*. Bringing the full power of conversational AI technology to bear, IVAs supplement human sales reps by serving directly in customer-facing roles.

Over voice- and text-based conversations, IVAs can understand complex customer input and respond with remarkable life-like fluency. When receiving inbound calls, it serves as a significant step up from even advanced interactive voice response (IVR) systems.

However, it's in an outbound capacity that IVAs can shine. With the ability to turn over texts and calls to a fluent virtual agent, teams can effectively outsource aspects of their omnichannel workflow: the IVA can independently sort out scheduling, route customers to the right agents, and even pre-qualify leads—all within each lead's preferred channels.

SOLUTION SPOTLIGHT



Today's leads are busy. They're tired of spam calls. And they're tough to get on the phone. To drive real growth, your team needs something new.

Unlock a new engagement model to drive higher contact rates and more conversions with Voso.ai, Convoso's all-new conversational AI platform.

The only solution designed to meet the demands of outbound sales and lead gen contact centers, Voso.AI is IVA software that engages with leads on their channel of choice to automate routine conversations, qualify more leads, and generate more revenue at less cost.

Voso.ai leverages natural language understanding (NLU) technology to converse with prospects over text and voice. Add Voso.ai to your team and boost your organization's profitability by:

- 💡 Reaching out to more leads with an improved contact rate
- 💡 Automating repetitive conversations to reduce CPA
- 💡 Refocusing agents on closing deals with higher-intent leads
- 💡 Contacting previously unprofitable groups of leads with an AI over SMS
- 💡 Reducing churn and empowering agents to handle more important tasks

Integrated directly with the Convoso platform, the industry's fastest and most powerful dialer, this single solution drives more lead responses, more transfers, and more conversions with a lower CPA.

Discover a revolutionary new path for growth with Voso.ai. Learn more about what Voso.ai can do for your business and schedule a free demo of Convoso today.

[Demo Voso.ai](#)

Automate Your Organization and Achieve Scale

AI might be the technology of the moment, but it's not the only technology you need.

In fact, AI is just one piece of the wider automation puzzle organizations need to assemble to achieve success. And not just any kind of success—but success *at scale*.

To create a sales process that's as efficient as possible from end-to-end, shape it around these crucial technologies that leverage AI and other types of time-saving, deal-closing automation.



CRM Platform

No matter your industry, customer needs will always be at the core of the sales experience. The right CRM software puts all the data you have on those needs at the core of all your sales activity.

Leveraging AI, automatically updating customer records, and helping teams analyze customer sentiment, your automation-driven CRM can power personalized experiences every time your

team makes contact and wherever that contact is made. And in the meantime, your agents will have more time to spend on those critical moments of engagement and strategic thinking that actually move the business forward.



Predictive and Power Dialing Software

If you're doing outbound sales and lead generation, the insights contained in your CRM will only ever be as good as the dialer that puts them to use.

Automation and intelligence are what drives today's most effective dialers. In predictive and power dialing modes, automated dialing cadences help you make the most of your leads and your agents' time. But the right dialer will offer much more than that in the way of automation.

Beyond integrating with AI-powered tools and CRM software, look for dialers that offer automation options like:

- ✓ **Skills-Based Routing**
- ✓ **Workflow Dialing**
- ✓ **Lead Prioritization**



Intelligent Virtual Agent Software

Perhaps the most impressive specialized use of AI within sales and lead gen that we've seen yet, the very best IVAs are specifically designed to help teams achieve scale with much greater sales efficiency. Add an AI to your team that can take on actual sales work while empowering your agents to make more sales themselves.



Dynamic Scripting Software

When agents get an important lead on the line, having the right message needs to be a sure thing. Make certain that they have the right opening, pitch, compliant disclosures, and rebuttals all ready to go—and do so automatically—with dynamic scripting software.

With this trick up your sleeve, your dialer will automatically pop a personalized sales script you've crafted to give them the best chance at success. Plus, it will adjust and update in real time based on how a customer responds, all the way till the time you close.



Quality Assurance Software

Even with all the right tools at their disposal, nobody will get it right every single time. QA software is there to make sure that lessons are learned, feedback is delivered fast, and improvements are made as soon as possible. And as we've seen, with AI-powered QA tools, those benefits can be delivered to more agents than ever before.



Reporting and Analytics

QA software delivers rich data on your conversations, but there's much more to report on in the average day on a sales floor. Equip your managers and leadership team with a reporting platform capable of sending custom, automated reports at the pace you need to understand performance and take effective action.

Conclusion

"Scale without automation doesn't exist."

That phrase from our CEO and Co-Founder, Nima Hakimi, has become something of a mantra here. It's a simple statement, sure, but the accelerated rate of AI's advancement has only underscored how true it is and how important it is to take to heart.

Without automation and artificial intelligence, your business risks being stuck in the past—at a time when the future is already here. As of last year, 51% of marketers were already piloting or scaling some form of AI technology. Your competition isn't waiting on you—and neither will your potential customers.

We hope, with the help of this guide, you'll now have a leg up on starting (or accelerating) your AI journey.



Get dramatic results for your call center

About Convoso

Convoso powers conversations at scale, providing the leading contact center software for sales and lead generation teams. As a MarTech innovator, its award winning solutions include the fastest, most powerful omnichannel dialer, as well as Voso.ai, conversational AI technology.

Since 2006, Convoso has continuously innovated our solutions to drive customer growth while supporting regulatory compliance.

[Schedule a demo](#)



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