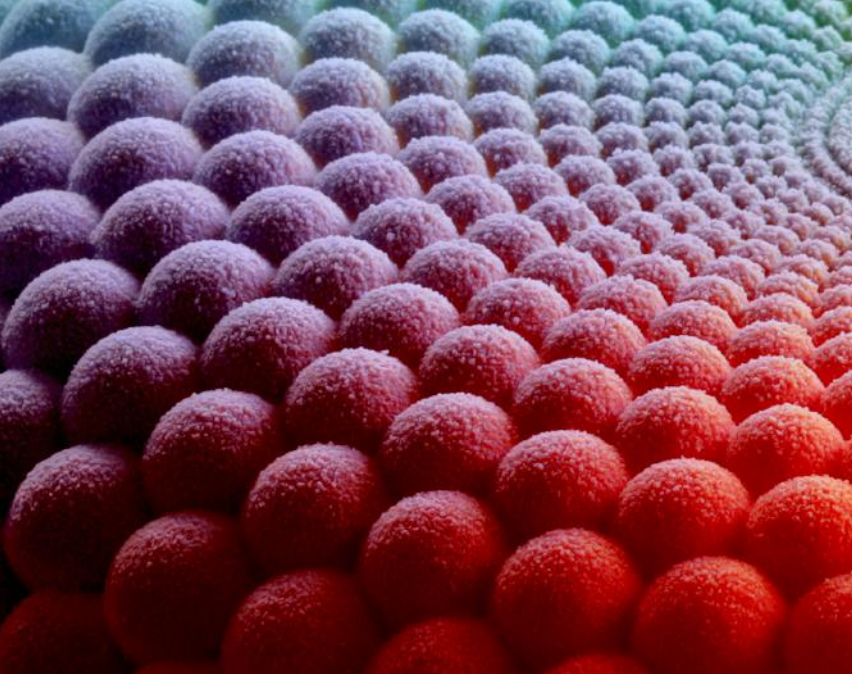B2B sellers, meet your new *Gen AI sales assistant*

Capgemini

Can generative AI help sales teams get back to the core of great selling?

John was in the middle of his favorite TV show when an intrusive knock at the door jolted him from his armchair. Succumbing to his curiosity, he opened the door and was greeted with a friendly smile and an outstretched hand.

Regardless of whether they were a nuisance or a convenience, there's no arguing that door-to-door salespeople embodied the early form of personalized selling. The job required a great deal of persistence, but once their foot was in the door, they were able to ask the right questions to learn what the person genuinely needed.

Although today's business-to-business (B2B) sellers continue to operate in that same vein, albeit in a more digital setting, they lag behind their door-to-door counterparts in one main category: personal interaction.

Instead of spending more time with clients, using their natural people skills, B2B sales teams are neck deep in paperwork. Juggling multiple accounts, they must key in repetitive information and analyze mountains of data in hopes of crafting the right content to turn prospects into clients.

Astonishingly, they now spend less than one-quarter of their time in core selling or direct engagement selling activities.

If salespeople are hired for their soft-skill sales prowess, then why aren't they spending the majority of their time actually selling?

Let generative AI do the heavy lifting while you do the selling

For a long time, the most powerful companies were the ones who had the most knowledge – or data turned into extremely valuable information.

However, that all changed with the democratization of data. Access to information is no longer a differentiator. Instead today, what sets B2B companies apart is their ability to quickly extrapolate data into insights, at the right moments, to give clients exactly what they want.

Generative AI is now that differentiator and it will open a world of new possibilities where productivity soars and close client connections become important again.

Imagine if every salesperson had a virtual clone of themselves akin to a sales assistant or buddy.

This digital twin would handle all the repetitive, mundane tasks such as scheduling appointments and updating systems. It could also serve as the initial response to client inquiries through voice and chat assistance, using the knowledge already gathered about them over time.

As it becomes even more attuned to client requirements, it can provide quotations, facilitate order completion, identify cross-selling opportunities, and offer the right products considering the client's current pain points and future business aspirations. This reality is now possible, and companies can finally lift the

burden of time-consuming administrative tasks from their sales teams, not to mention increase client engagement and make it as personalized as possible.

All this can happen while a salesperson goes about their daily tasks now empowered with generative AI to uncover new business opportunities, build strong relationships, and deliver exceptional customer experiences. Here's a typical example of how generative AI can help make their work before, during, and after a client interaction more efficient as well as give them a better chance at acquiring and retaining clients.

Before contact

Salesperson Emma has a list of qualified leads but doesn't know which ones will turn into credible opportunities. She uses an AI-powered capability to analyze factors like company size and demographics, industry, territory, and engagement history to see which leads are the most promising. After a quick review, she selects GreenTS Inc., a leading sustainable energy solution provider, and is able to set up a meeting with the potential client.

Now she needs to prepare a compelling pitch. Since a standard customer relationship management (CRM) system alone isn't enough

to get the full picture about a client and its industry, Emma's company has integrated a set of AI technologies that makes the CRM system smarter. It merges the company's data with external information and gives Emma access to a single data source through a natural language user interface. She asks the system to provide her with information on the prospect's current projects as well as industry trends and potential pain points.

The system generates a report highlighting GreenTS's recent expansion into renewable energy sources and its need for more efficient

energy storage solutions. Then it combs through internal systems to reveal relevant content for the client at a strategic proposition level.

Emma also asks the system to suggest objectives for the upcoming meeting and to draft an email to GreenTS offering products that can help it reach its goals faster. Emma has saved hours of research and preparation time, and with a list of talking points, she feels confident going into the meeting.

During contact

Generative AI is redefining the concept of sales intelligence. During the meeting, Emma uses an advanced analysis tool that acts as an expert business coach listening in on her conversation. Unbeknownst to GreenTS, it prompts Emma with product recommendations and other useful information she may not have thought of to compel GreenTS to consider her offer.

The tool also helps Emma become a better communicator. It offers real-time tips on the words she uses, her tone of voice, and body language. And it provides on-the-spot sentiment analysis suggesting how Emma can adjust her sales pitch to keep her client interested.

Considering the importance of face-to-face interactions in B2B relationships, AI-driven coaching can help sales teams improve their negotiation skills and the quality of their sales proposals.

After contact

Once a sale is made, the work is far from over. But AI solutions can make the work easier to complete. For example, Emma uses a large-language-model (LLM) tool to create a summary of her meeting with the most important aspects highlighted. The tool also categorizes the meeting and produces a personalized email thanking GreenTS's representative for their time and consideration.

To anticipate GreenTS's future needs, Emma uses predictive analytics to review historical data so she can forecast potential scenarios. The capability suggests opportunities for Emma to offer additional value to GreenTS, whether that's through providing tailored products and services, upgrades, or support.

The predictive capabilities of AI empower businesses to be prepared to respond to client needs before they arise. This ensures that proactive and personalized service abounds. And if a client contacts the business through a dedicated sales channel, Emma's AI double can first provide them the most relevant information, then connect them to Emma if the client requires a more personal, human approach.

A rundown of generative AI's benefits for sales

- Efficiency enhancement

- Brand consistency

- Request for proposal (RFP) scanning

- Live coaching within meetings

- Sentiment analysis

- Tailored sales reporting

- Automated follow-ups

- Content generation

- Lead prioritization

- Data-driven decision-making

- Personalization excellence
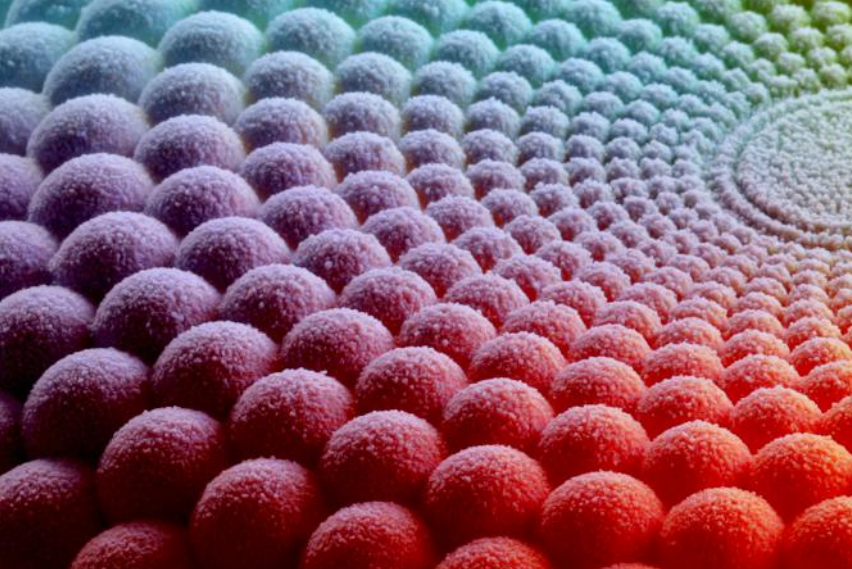
In the face of generative AI challenges, direction determines success

Emma's organization chose specific AI solutions to increase employee productivity and client personalization at every stage of the sales process.

But many organizations don't know what objectives they should set with generative AI. With multiple generative AI tools popping up weekly, it can be tempting to grab and integrate something in fear of falling behind industry trends and perceived standards. But this would be a mistake.
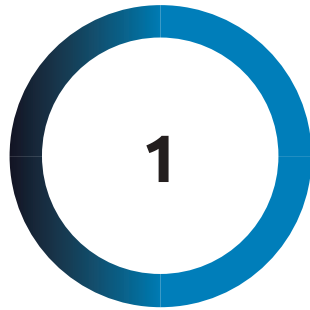
Like with any journey, if there's no clear direction of where you want to go, you may end up somewhere you don't intend to be, with severe consequences. In this situation, there may be data security, ethics, and cost challenges that can massively slow down a generative AI transformation.

Let's examine each of these challenges.

Data security	Ethics	Cost
Regardless of the selected AI solution, the company data should remain secure, encrypted, and protected. Generative AI models are trained on public datasets, and by supplementing them with company data, there's a high risk of intellectual property leakage. Established generative AI vendors have safeguards in place to ensure a company's prompts, internal documents, and client interactions aren't shared publicly but rather used to enhance the model's performance.	AI models rely on vast amounts of personalized information from people, which raises privacy concerns. The origin of this information is important, and organizations must be sensitive to the fact that AI may be gathering information from publicly available sources like blogs and social media accounts. Additionally, privacy laws differ from region to region, which requires an understanding of the legal and regulatory frameworks of a given country. By doing so, organizations can avoid potential fines in the event of non-compliance as well as reputational damage.	Although generative AI is a transformational technology that can end up increasing employee efficiency and, ultimately, sales revenue, initial startup costs can be quite high, especially if the tools selected overwhelm or underwhelm an organization's expectations. Hardware costs and system integration expenses can also add up fast.

Therefore, it's crucial to have a well-structured plan to ensure resources are directed towards high-impact solutions that cover a broad range of sales scenarios. Most organizations follow a simple three-word scheme: identify, define, prioritize.

# The 3 steps to generative AI integration

1

Define the operating model and sales processes

Building and scaling generative AI capabilities requires a plan, which must consider the rest of the enterprise's existing solutions and data architecture. Hint: integrated solutions will be more cost-effective and make data governance easier to manage.

3

Identify the value proposition of generative AI

Whether it's to increase sales, open self-serve channels, or simply make sales processes more efficient, determine the potential value of generative AI for the business operation.

2
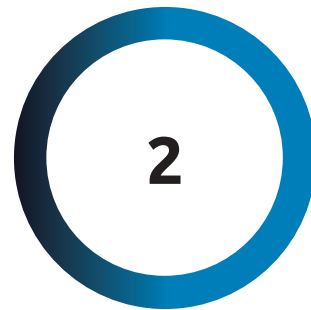
Prioritize opportunities and develop a roadmap

Before creating a roadmap, all stakeholders must be clear on the ambition, the order, and the dependencies of the various generative AI opportunities. Then the selected solutions must fit into the overall architecture and strategy of the business. The solutions can include applications, databases, integration engines, and frameworks.
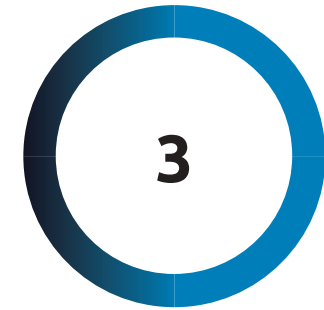
Although the approach seems simple, there's a lot more to it than meets the eye.

And its execution can be hard and time-consuming. But without it, organizations can quickly find themselves running multiple pilots that eventually turn into wasteful projects if objectives aren't met.

This is where a partner can offer expert guidance and technical capabilities to see the plan come to fruition as they train employees for the new transformed workplace. Finding a suitable partner is important. Because, as Forrester claims, 30% of AI decision-makers say a lack of technical skills to use generative AI is one of their biggest barriers to adopting it; 28% also cite difficulty integrating the technology with existing infrastructure.

For example, Capgemini recently helped a global energy services provider identify its sales department's top uses cases for generative AI. An assessment revealed that they could improve their sales conversion rate through tailored offers, which requires automated client segmentation based on real-time customer behavior and purchasing. We identified nine other use cases and provided eight demos with an emphasis on possible results based on the market sector.

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28%

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1 https://www.forrester.com/report/
   the-state-of-generative-ai-2024/
   RES180458
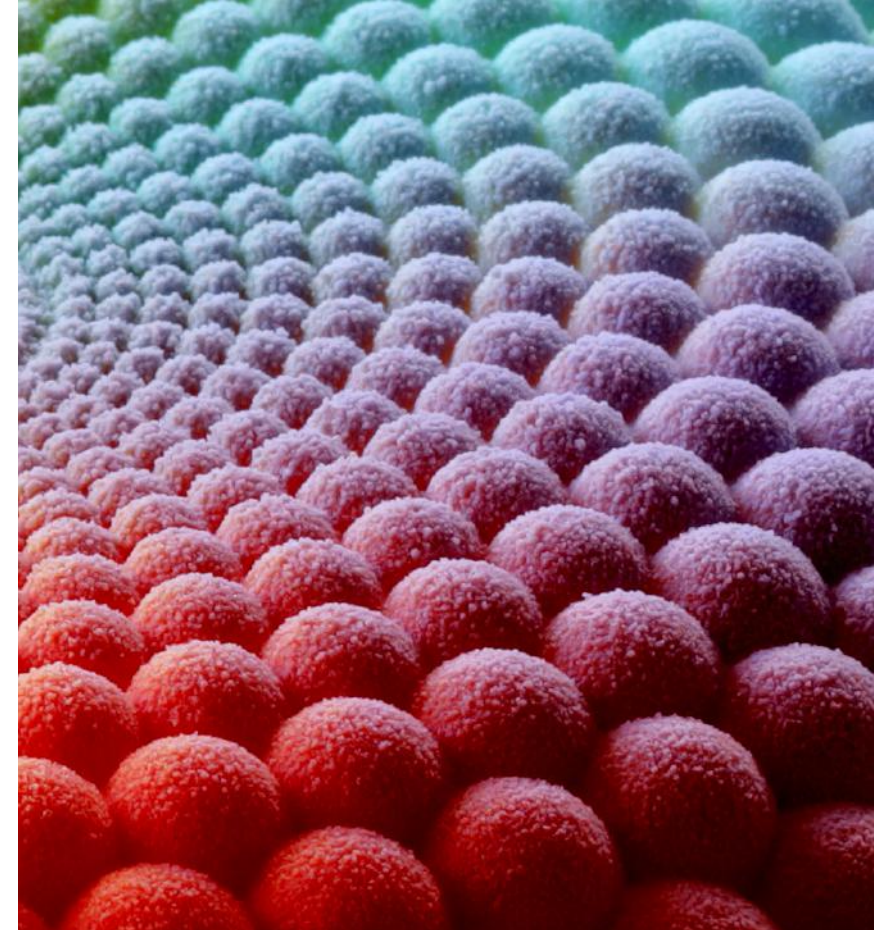
A CRM revolution via Copilot for Sales

Riverty, a global fintech, specializes in "buy now, pay later" options, comprehensive debt management, fraud prevention, accounting services, and a variety of payment solutions.

Riverty was having a hard time managing tasks outside of its CRM system. A lack of information and transparency related to existing CRM processes negatively impacted the accuracy and reliability of reporting.

To improve the sales experience, the fintech decided to embed Microsoft Sales Copilot into its existing Dynamics 365 CRM system. It also upgraded to the more advanced Dynamics 365 Sales premium edition to access generative AI capabilities.

The aim was to equip the customer support team with features like concise summaries of customer interactions with the ability to generate personalized responses to inquiries. The team would also be able to access company information through natural language queries. Additional AI functions, such as sentiment analysis, would help the team better understand customer emotions from call recordings and emails.

So far the new generative AI features have helped Riverty*:

- Enhance **CRM user satisfaction** by **23%**

- Accelerate **retrieval of sales information** by **67%**

- Increase **usage of CRM sales functionality** by **33%**

- Develop a **more customer-centric approach**, improving customer interactions and overall service quality

*Based on user survey.
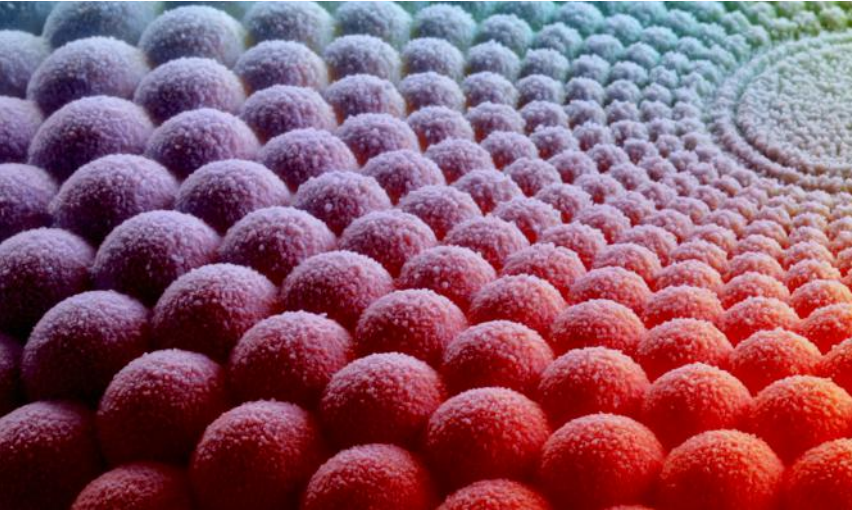
# Great selling relies on human intuition and empathy

Thanks to digital transformation and technologies like generative AI, today's salespeople can build more personal and meaningful relationships than the salespeople of yesterday.

60%

of B2B seller work will be executed by generative AI technologies.[2]

2 https://www.gartner.com/en/newsroom/press-releases/2023-09-21-gartner-expects-sixty-percent-of-seller-work-to-be-executed-by-generative-ai-technologies-within-five-years

With quick access to information about clients' industry requirements, past purchases, behaviors, and future intentions, they can dedicate more time to creating empathetic sales experiences.

Gartner predicts that by 2028, 60% of B2B seller work will be executed by generative AI technologies.[2] At Capgemini, we help organizations prepare for and adapt to this change so they can focus on what matters most:

listening, understanding, and personalizing solutions for clients.

B2B organizations know that nurturing client connections will result in more trust, keeping clients coming back, while attracting new ones through word of mouth. So the question isn't whether sales teams believe this to be true – it's whether they're equipped to ensure it's always a top priority.
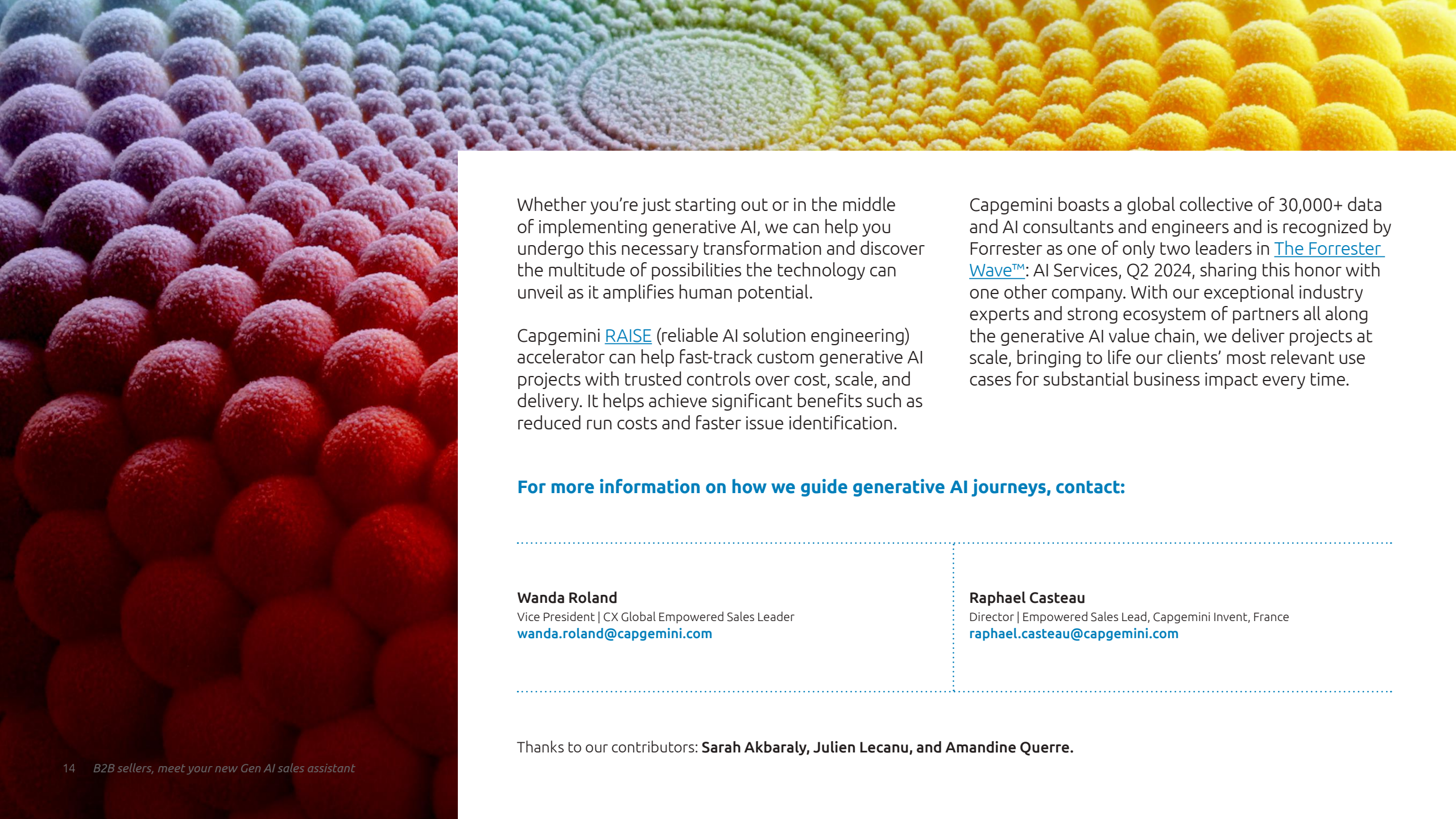
Whether you're just starting out or in the middle of implementing generative AI, we can help you undergo this necessary transformation and discover the multitude of possibilities the technology can unveil as it amplifies human potential.

Capgemini RAISE (reliable AI solution engineering) accelerator can help fast-track custom generative AI projects with trusted controls over cost, scale, and delivery. It helps achieve significant benefits such as reduced run costs and faster issue identification.

Capgemini boasts a global collective of 30,000+ data and AI consultants and engineers and is recognized by Forrester as one of only two leaders in The Forrester Wave™: AI Services, Q2 2024, sharing this honor with one other company. With our exceptional industry experts and strong ecosystem of partners all along the generative AI value chain, we deliver projects at scale, bringing to life our clients' most relevant use cases for substantial business impact every time.

For more information on how we guide generative AI journeys, contact:

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About Capgemini

Capgemini is a global business and technology transformation partner, helping organizations to accelerate their dual transition to a digital and sustainable world, while creating tangible impact for enterprises and society. It is a responsible and diverse group of 340,000 team members in more than 50 countries. With its strong over 55-year heritage, Capgemini is trusted by its clients to unlock the value of technology to address the entire breadth of their business needs. It delivers end-to-end services and solutions leveraging strengths from strategy and design to engineering, all fueled by its market-leading capabilities in AI, cloud and data, combined with its deep industry expertise and partner ecosystem. The Group reported 2023 global revenues of €22.5 billion.

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