



# Empowering Trusted Advisorship with AI

De 7 eigenschappen van  
Commerciële Professionals

**Prof. dr. Toni Sfirtsis**

7 maart 2024





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“  
**Zijn uw huidige waardevolle  
klanten, over 5 jaar nog steeds uw  
waardevolle klanten?**

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”



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“  
**Als uw product/dienst/oplossing  
geen effect heeft op de  
marktpositie/positionering van uw  
klant, dan bent u niet relevant?**

”

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**“  
In de toekomst bent u niet in staat  
om alleen uw omzet-target te  
halen”**

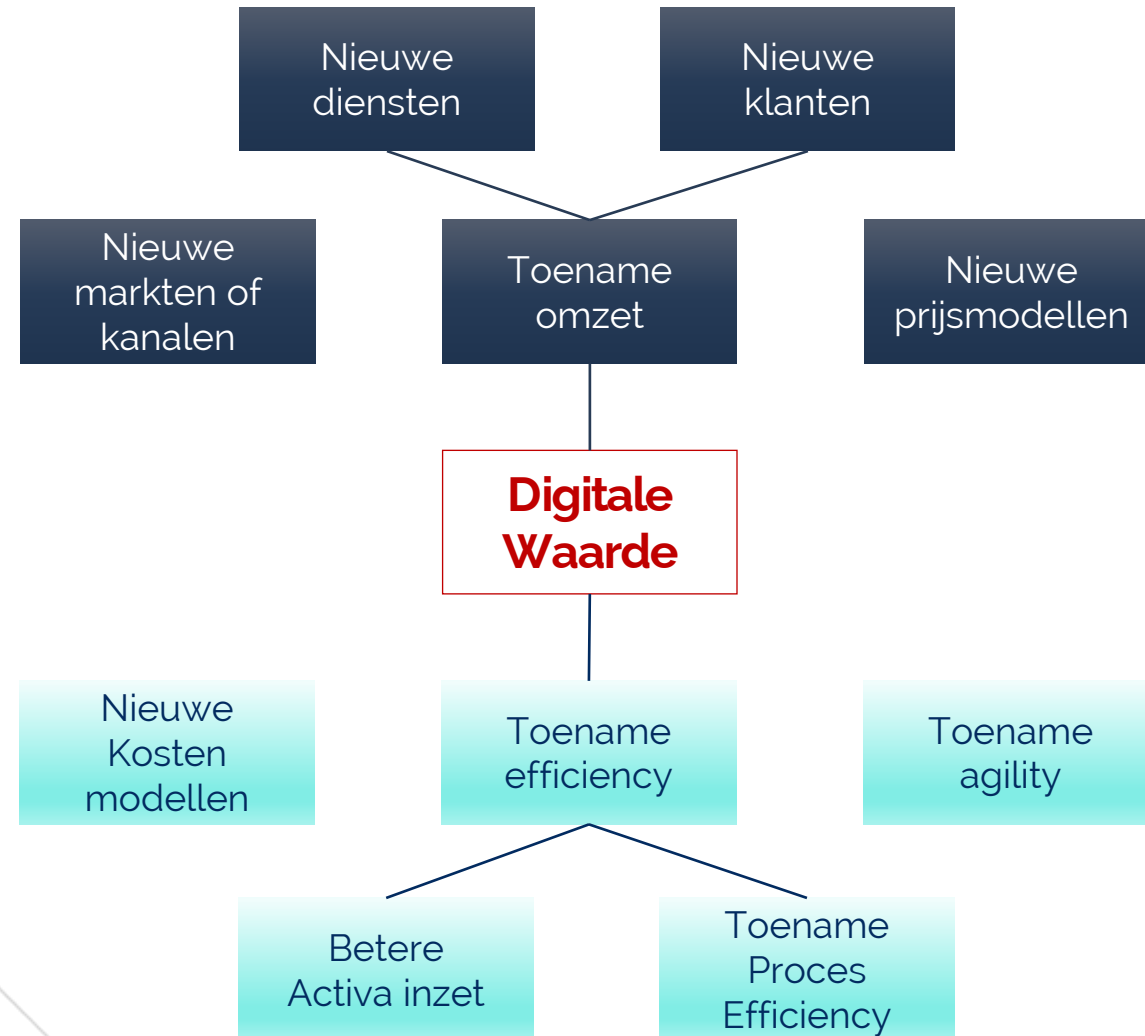


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“**Wat staat er over 5 jaar  
op de factuur?**”

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# De basis..... Digitale Toegevoegde Waarde



# De intelligente organisatie

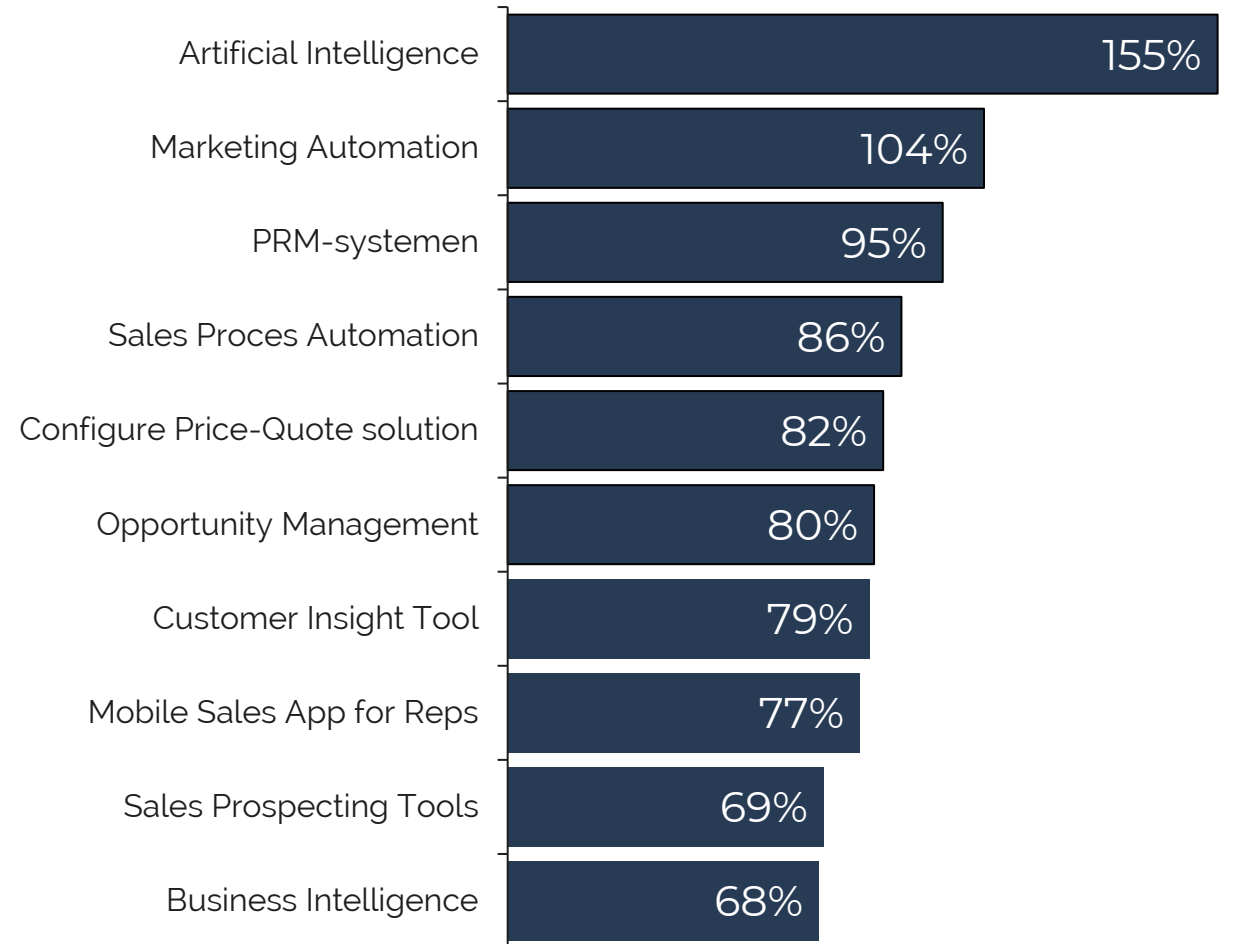
1. Heeft emotionele intelligentie hoog in het vaandel
2. Reflectief en zelfbewust
3. Een cultuur van open dialoog en feedback onderhoudt
4. Adaptief, flexibel en innovatief
5. Ontwikkeling van haar mensen staat centraal
6. Data-gedreven besluitvorming
7. Medewerkersbetrokkenheid
8. Kennismanagement
9. Sociaal en maatschappelijk betrokken
10. Klant staat centraal



**Ja**

# Technologieën met de hoogste impact op Commercie

SalesForce 2022





# Hoe klanten kopen aan het veranderen is

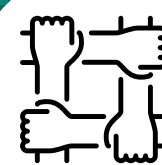
Partnership om samen  
in co-creatie  
problemen op te  
lossen

Wees loyaal naar  
me en maak me  
succesvol

Voorzie me van de  
juiste digitale content



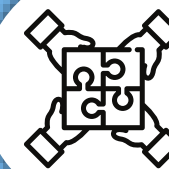
**ONTDEK**



**GEBRUIK**



**CONTINUEER  
PARTNERSHIP**



Wees empathisch  
betrokken



Transactiekosten zo laag  
mogelijk; Interacties zo  
waardevol mogelijk



Ondersteun me in  
mijn ontwikkelings-  
journey

# Klant Wordt Professioneler, Machtiger en Veeleisender...



Klant bepaalt hoe en wanneer en via welk kanaal/ medium hij geïnformeerd, geadviseerd, dan wel de deal wil sluiten



Klanten verwachten holistische ondersteuning gedurende de gehele PLC en Buying Journey.



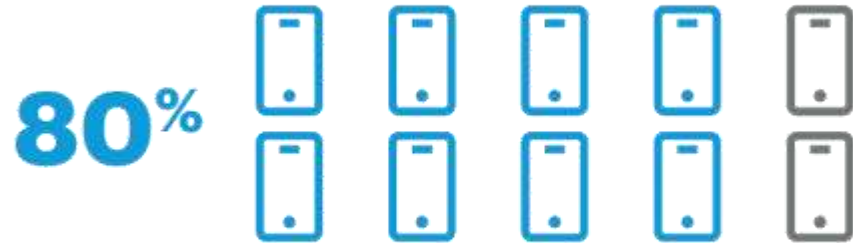
Klanten willen oplossingen aangepast aan hun persoonlijke, specifieke wensen



Transparantie en inkoop-professionaliteit worden door klanten bewust ingezet

# DT leidt tot efficiency en transparantie

Gartner expects that by 2025 ...



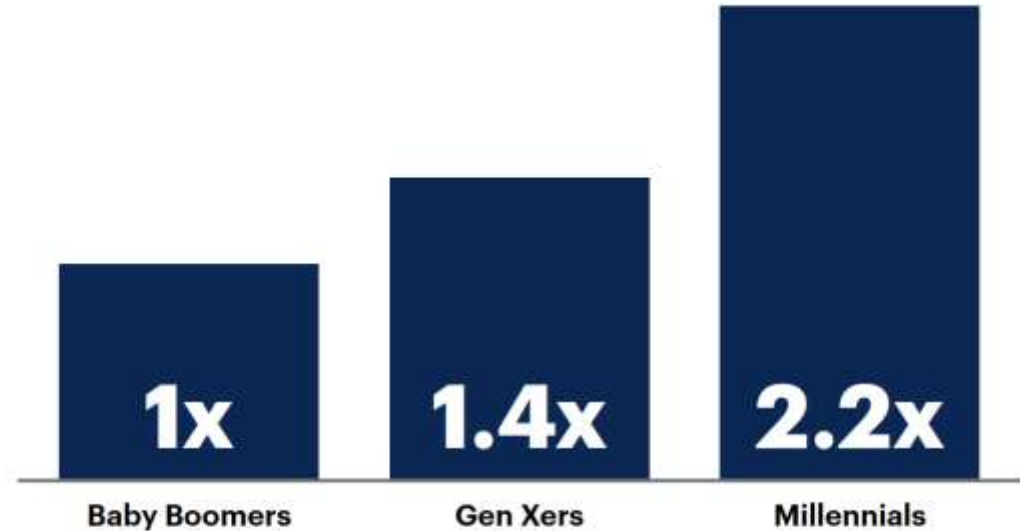
of B2B sales interactions between suppliers and buyers will occur in digital channels



of B2B sales organizations will transition from experience- and intuition-based selling to data-driven selling, merging their sales process, applications, data and analytics into a single operational practice

Source: The Future of Sales in 2025: A Gartner Trend Insight Report

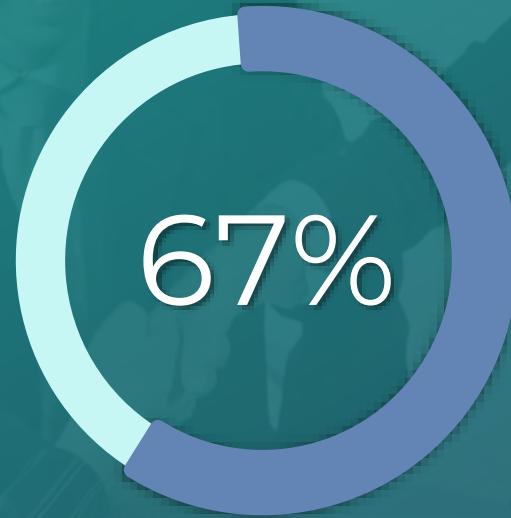
Indexed percentage of customers, by generation, who report high skepticism of sales rep claims



n = 809 B2B buyers  
Source: 2018 Gartner B2B Buying Survey

44% of millennials prefer no sales rep interaction in a B2B purchase setting

# THE BUYERS JOURNEY

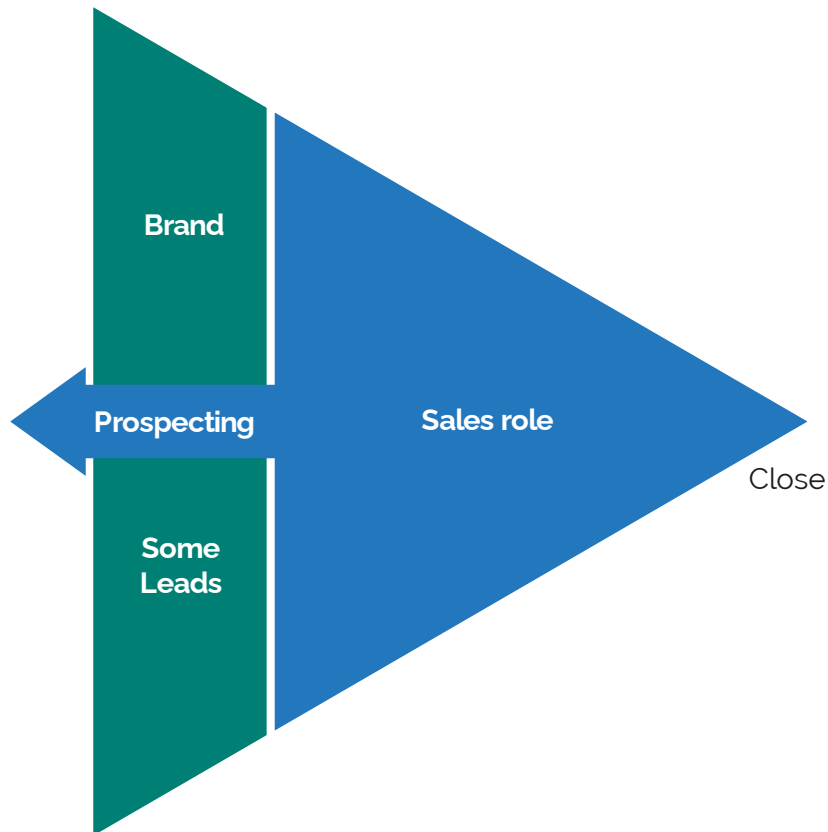


“This research found that customers reported being nearly 70 percent through the sales process before engaging a sales representative, irrespective of price point”

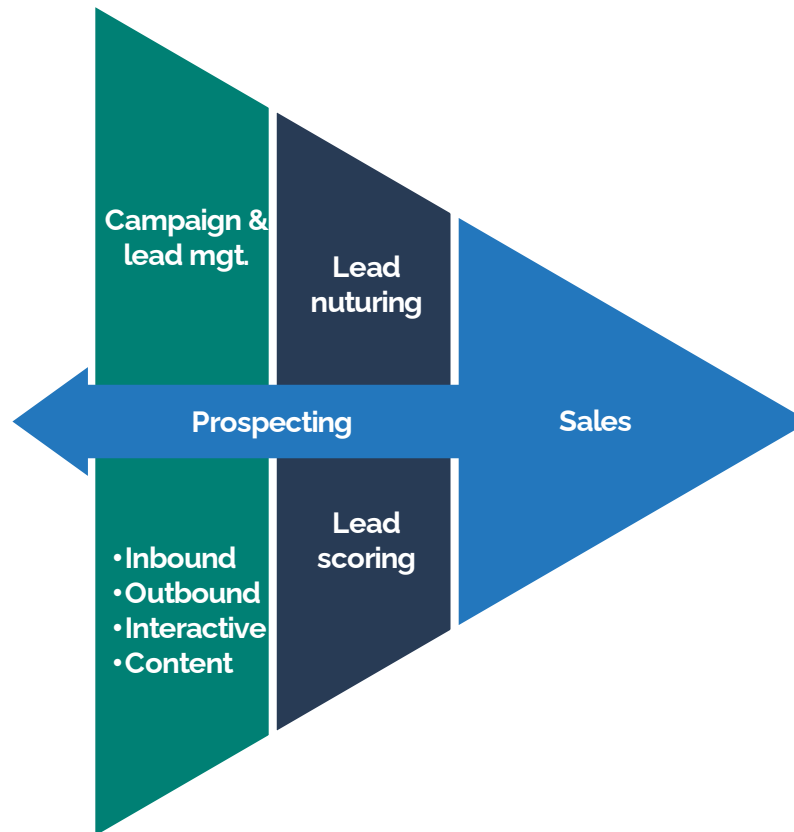


# Van klassieke Sales naar Trusted Advisory

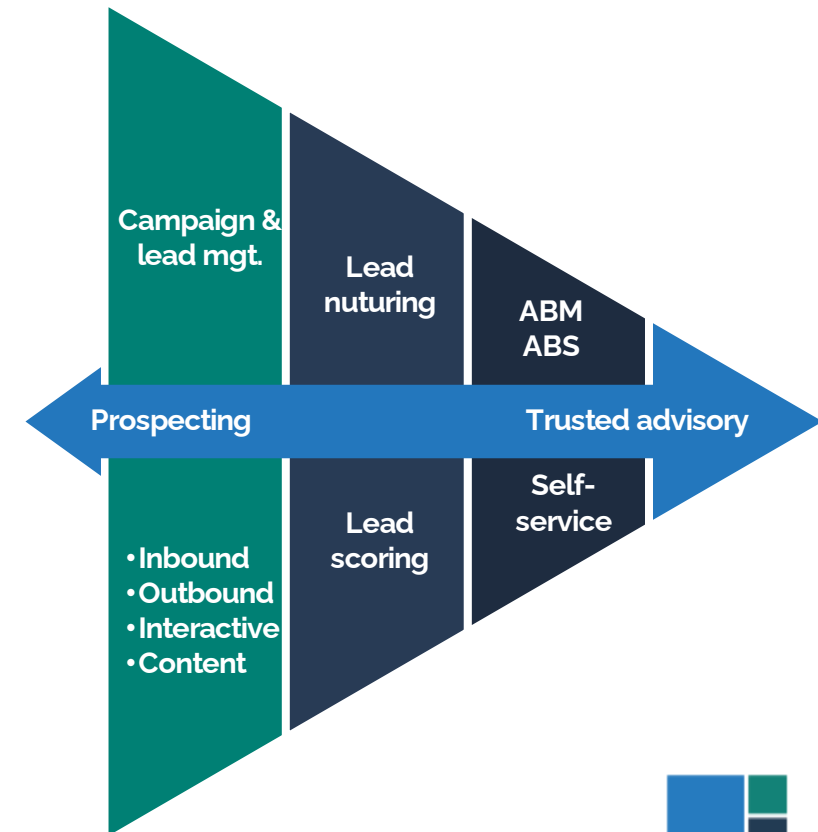
## Traditional Sales & Marketing



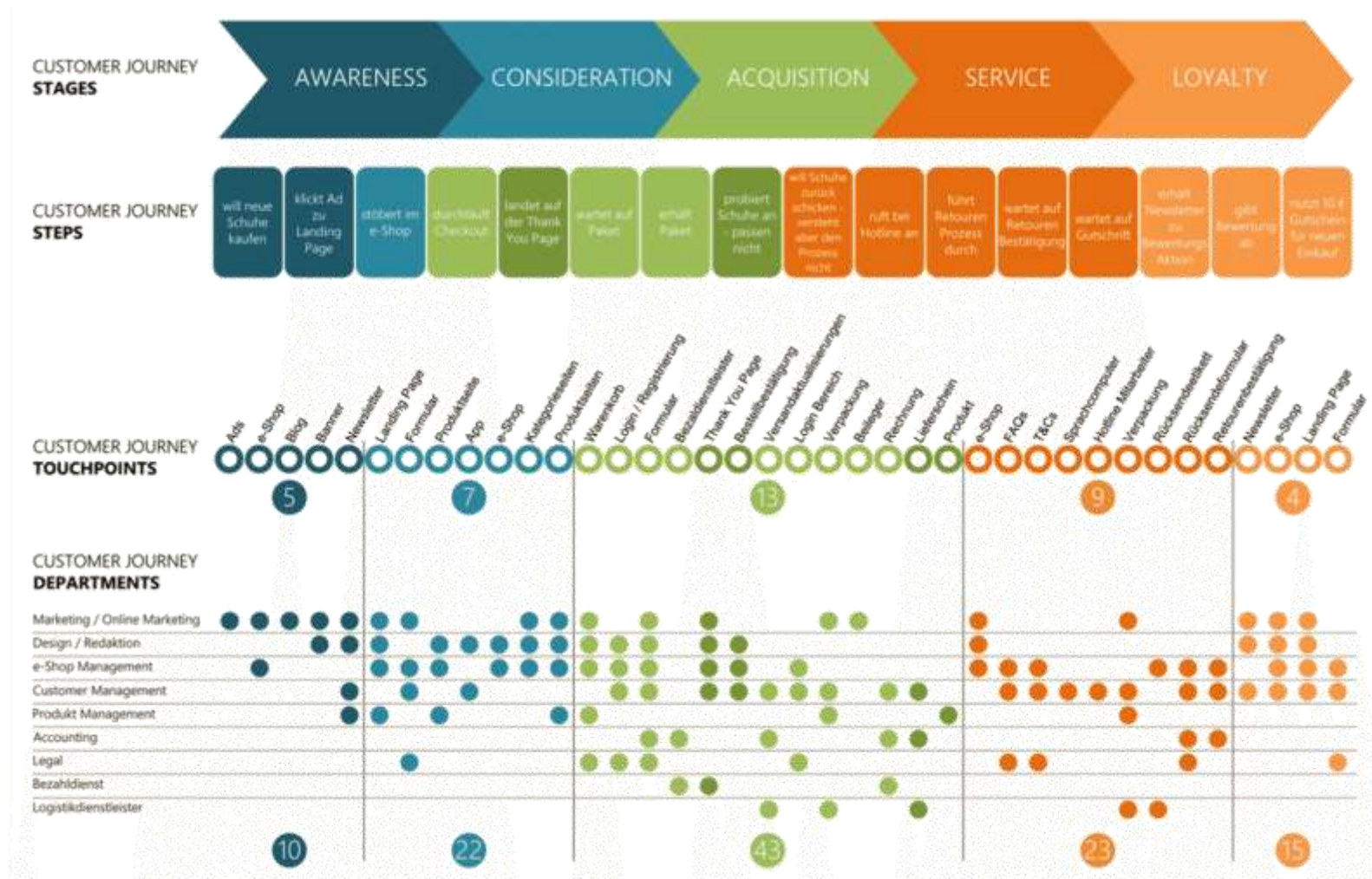
## Digital Marketing



## Self Service & Automation



# AI-Empowered Trusted Advisory = Team Sport



# Van Producten via Diensten/- Oplossingen

*naar*

## Experiences die leveren.....

*naar*

## Impact/ Waarde-creatie



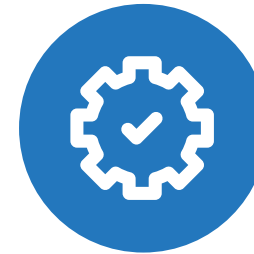
Personalisatie  
(tailormade  
interacties en aanbod)



Realtime/Snelheid –  
Frictieloze Bying Cycle  
en Optimale Self Service



Meetbare output –  
door 'issue-driven  
problem solving'



Efficiency & TW van  
touch-points

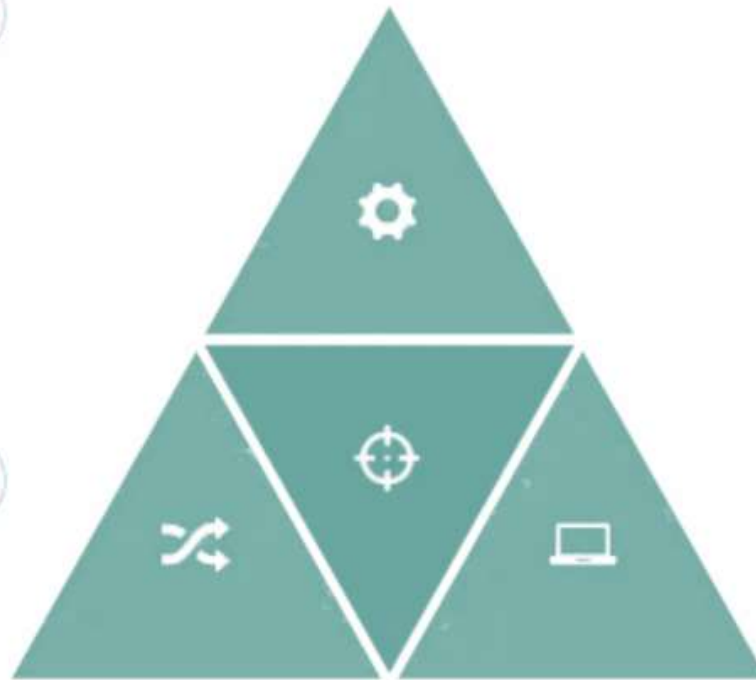
# Randvoorwaarde ..... naar Commercial Excellence

## CUSTOMER CENTRICITY

Klant staat centraal in alles. Gehele operatie is geënt op het excelleren in de Buying Journey (pro-actief en waarmaken van innovatieve waardeproposities)

## OPTI-CHANNEL BENADERING

Maak het de klant makkelijk om maximaal zelf keuzes te maken t.a.v. het gebruik van digitale/non-digitale kanalen/media



## SERVICE ORIENTATIE

Help de klant om jouw aanbod zo in te zetten dat hoogste impact wordt gerealiseerd



## DIGITAL SALES TOOLS

Zet digitale sales tools (zoals AI) in zowel in het primaire sales proces alsook in de Ondersteunende processen.



# Commercial Excellence : Relevant zijn en blijven



# Noodzaak... Commercie als teamsport



Commercie als  
teamsport

- Complexiteit van Markten en klantbehoeften

- Integratie van verschillende expertises

- Innovatie en creativiteit

- Snellere en Effectievere besluitvorming

- Betere klantrelaties en -ervaring

- Cross-functioneel in staat om samen te werken

- Flexibiliteit en aanpassingsvermogen

- Efficient gebruik van bronnen

- Weet hoe technologie productief kan inzetten

# De 7 eigenschappen van succesvolle commerciële professionals



# AI toepassing in verkoopprocessen

Covey's Eigenschappen	AI Toepassing in Verkoopprocessen
Wees Proactief	Klantidentificatie en Lead Generatie
Begin met het Eind in Gedachten	Sales Forecasting en Planning
Belangrijke Zaken Eerst	Prioritisering en Taakbeheer
Denk Win-Win	Gepersonaliseerde verkoopstrategieën
Eerst Begrijpen, Dan Begrepen Worden	Klantenzicht en Engagement
Synergie Creëren	Teamcollaboratie en Efficiëntie
Houd de Zaag Scherp	Continue Leren en Verbetering



# Wat betekent dit voor de commerciële professional?

Van loyale 'solutions provider' naar 'trusted advisory als een teamsport



Een 'Trusted Advisor' Die ...

- Daadwerkelijk de business van de klant kennen
- Challenger Sale competenties heeft
- Pro-actief inzichten en bewezen oplossingen deelt
- Co-creëert met klanten
- Integraal onderdeel is van de Customer Journey
- Cross-functioneel in staat is samen te werken
- Liaison is in de diverse eco-systemen
- Alliantie-management vaardigheden bezitten
- Weet hoe technologie productief kan inzetten

# Vereiste competenties Trusted Advisor

Habit van Covey	Vereiste Competentie	Rol en Bijdrage van AI
<b>Wees Proactief</b>	<i>Digitale Geletterdheid</i>	AI helpt bij het proactief identificeren van kansen door markttrends en klantgedrag te analyseren.
<b>Begin met het Eind in Gedachten</b>	<i>Strategisch Denken en Planning</i>	AI-tools voor scenario-planning en voorspellende analyses ondersteunen bij het formuleren van doelen en strategieën.
<b>Belangrijke Zaken Eerst</b>	<i>Aanpassingsvermogen en Flexibiliteit</i>	AI ondersteunt prioritering en taakbeheer door automatisering en identificatie van impactvolle activiteiten.
<b>Denk Win-Win</b>	<i>Collaboratieve Vaardigheden</i>	AI-gestuurde communicatieplatforms en CRM-systemen verbeteren de samenwerking en creëren win-win oplossingen.
<b>Eerst Begrijpen, Dan Begrepen Worden</b>	<i>Emotionele Intelligentie</i>	AI-gestuurde sentimentanalyse en klantengagement tools verbeteren het begrip van klantbehoeften en emoties.
<b>Synergie Creëren</b>	<i>Creatief Probleemoplossend Vermogen</i>	AI analyseert data om nieuwe inzichten te onthullen en stimuleert creatieve probleemoplossing binnen teams.
<b>Houd de Zaag Scherp</b>	Data-analyse en Interpretatie	AI biedt gepersonaliseerde leerpaden en ontwikkelingsprogramma's op basis van individuele prestaties.

# Transitie naar Trusted Advisorship as a Teamsport

1. Diepgaande kennis en Empathie
2. Strategische Advisering
3. Geavanceerde communicatie en onderhandelingsvaardigheden
4. Cross-functionele Interne en Externe samenwerking
5. Data-driven inzichten en Aanpassingsvermogen
6. Teamgebaseerde aanpak van Trusted Advisorship
7. Continue Professionele Ontwikkeling.

# Je kan alles op orde hebben maar het staat of valt met.....

1. Factuur – waar wordt je voor betaald?
2. Segmentatie – hoe kijk je naar klanten
3. Je bedieningsconcept (customer journey)
4. Sales vs. Commercial Excellence
5. Lone-rider versus Commercial team
6. Sturing
7. Omzet – doel of middel?



# Master in Sales

Ontwikkel in één dag next-level competenties en inzichten voor een future-proof sales mindset!

- 1. Wetenschappelijk up-to-date in één dag**
- 2. Inspiratie uit de praktijk van Industry Leaders**
- 3. Bouwen aan je professionele network**
- 4. Permanente Educatie (PE) certificaat**

**Wanneer?**

*5 juni 2024*

*Omgeving Utrecht*



Meer info?







# Seven Use Cases for AI in Sales Processes

Manifesting the seven habits of successful salespeople.

**Dr. Marc Teerlink MBA, MBI**

Chief AI Officer | Strategy Advisor | Board Representation | Growth Leader



Hands Up

# What traits do you believe make up for the most successful sales professionals

1. Be proactive
2. Begin with the end in mind
3. Seek first to understand, then to be understood
4. Think win-win
5. Put first things first
6. Synergize
7. Sharpen the saw

What are we talking about?

# **Manifesting** the seven habits of successful salespeople

- Manifesting is the idea that, through the power of belief, that we can effectively “think” a goal into becoming reality. It’s a form of magical thinking, or the need to believe that one’s hopes and desires can have an effect on how the world turns.
- Other people just call it “living the seven habits of successful salespeople “
- We call this magical thinking that helps to make it happen: “AI”





# AI Definition 2024

“The orchestration of a set of knowledge-embedded technologies that,

when used together,

**augment or automate a complete task of a specialist, an expert or a professional knowledge worker”**

Source: Marc Teerlink, TNW 2017



© Data To Dollars LLC, Marc Teerlink, March 2024

Misconception:


**”AI is for ‘new things’”**

people want to do the same things they've  
always done, **only faster, cheaper,  
and with much more data**

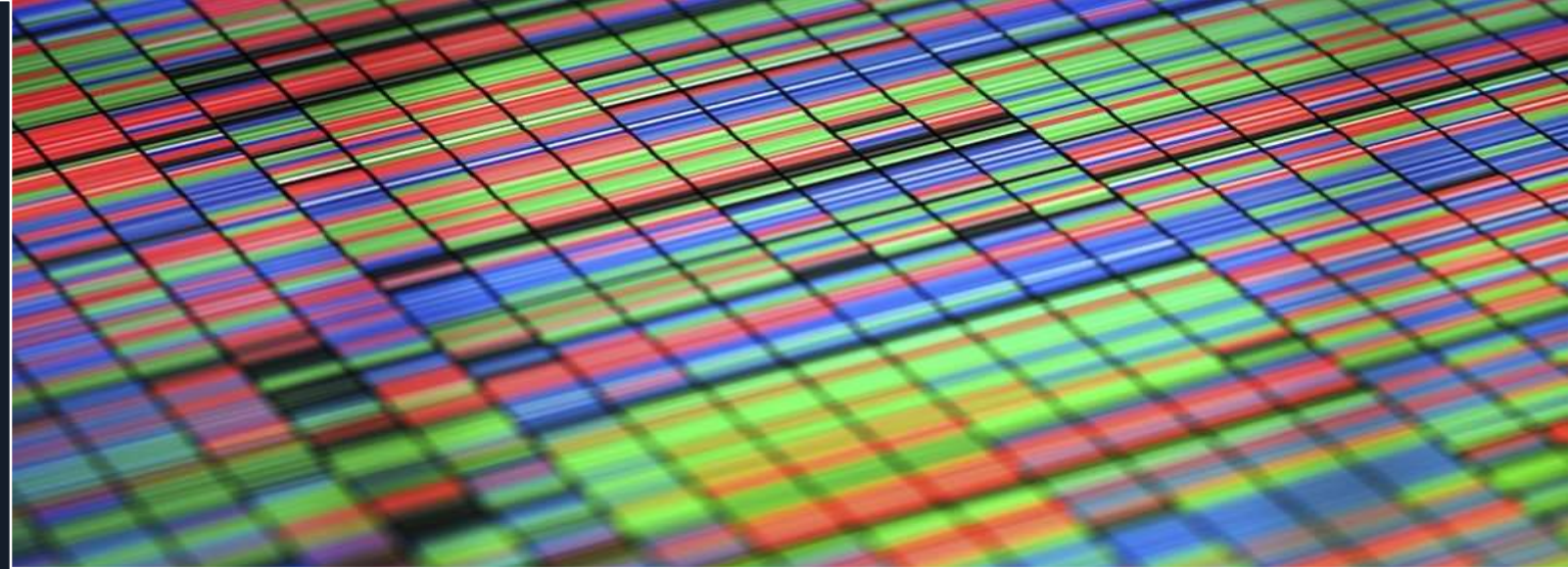




# What AI Use Cases can help manifest “the seven habits of successful salespeople”

- 
- 1 Be proactive**  
Demand forecasting
  - 2 Begin with the end in mind**  
Lead generation
  - 3 Seek first to understand, then to be understood**  
Predictive sales and lead scoring
  - 4 Think win-win**  
Customer centric personalization & analytics
  - 5 Put first things first**  
Sales rep next action suggestions
  - 6 Synergize**  
Automation of Sales data input, Meeting setup etc.
  - 7 Sharpen the saw**  
Body, Mind, Heart & Spirit

# ① DEMAND FORECASTING



## Be proactive

Focus and act on what you can control and influence instead of what you can't.

- Automatic and accurate sales forecasts based on customer interactions and previous sales outcomes using AI
- Helps sales teams allocate resources effectively and prioritize opportunities
- Saves time and effort of Sales Reps in prediction



# Use Case: copilot for excel

“Take this quarter’s sales results, analyse the data and provide me three key trends”

The screenshot shows the Microsoft Excel interface with the Copilot sidebar open on the right. The main workspace contains two line charts and two data tables. The left chart, 'Sales growth over time for Proseware', shows a blue line with data points for Q1-22 (8%), Q2-22 (12%), Q3-22 (10%), Q4-22 (7%), and Q1-23 (1%). The right chart, 'Projected Sales growth over time for Proseware', shows a purple line with data points for Q1-22 (8%), Q2-22 (12%), Q3-22 (10%), Q4-22 (7%), and Q1-23 (9%). Below the charts are two tables. The first table, 'Proseware Sales growth by Product', shows growth rates for various products from Q1-22 to Q1-23. The second table, 'Model: Reusable Containers with Q1-23 growth rate equal to Q4-22', shows a model where the growth rate for Reusable Containers is adjusted to match the Q4-22 rate.

Product	Q1-22	Q2-22	Q3-22	Q4-22	Q1-23
Biodegradable Cleaning Products	3%	4%	6%	10%	5%
Compostable Food Packaging	9%	11%	15%	5%	13%
Reusable Containers	7%	10%	11%	6%	-9%
Reusable Water Bottles	15%	18%	18%	10%	17%
Natural Personal Care Products	10%	14%	9%	5%	33%
Sustainable Snack Packaging	7%	11%	6%	15%	8%
<b>Total Growth</b>	<b>8%</b>	<b>11%</b>	<b>10%</b>	<b>7%</b>	<b>1%</b>

Product	Q1-22	Q2-22	Q3-22	Q4-22	Q1-23
Biodegradable Cleaning Products	3%	4%	6%	10%	5%
Compostable Food Packaging	9%	11%	15%	5%	13%
Reusable Containers	7%	10%	11%	6%	6%
Reusable Water Bottles	15%	18%	18%	10%	17%
Natural Personal Care Products	10%	14%	9%	5%	33%
Sustainable Snack Packaging	7%	11%	6%	15%	8%
<b>Total Growth</b>	<b>8%</b>	<b>11%</b>	<b>10%</b>	<b>7%</b>	<b>9%</b>

## 2 LEAD GENERATION

# Begin with the end in mind

Define clear measures of success and a plan to achieve them.

- AI can analyze data to identify potential leads and prospects
- Automates lead generation process
- Helps in prioritizing high-potential leads and saves time



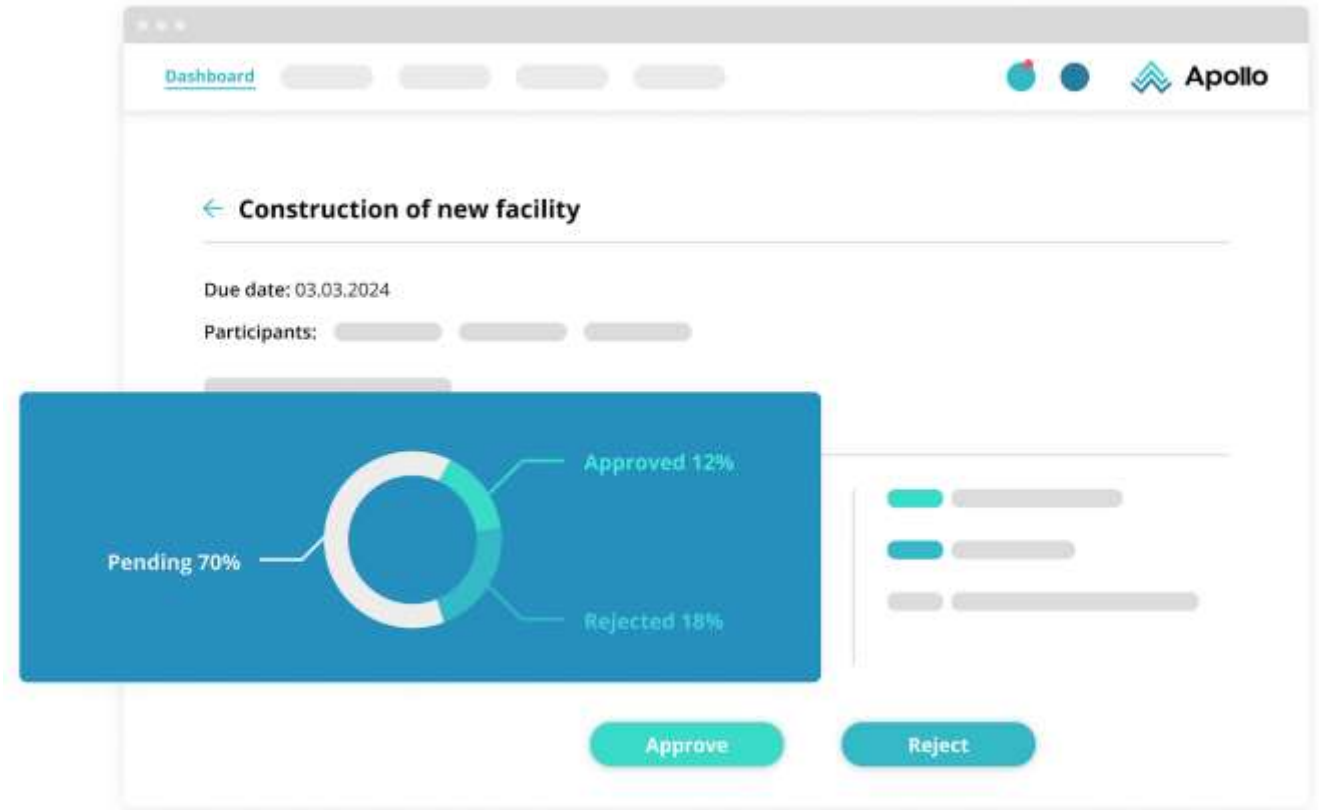


# Use Case: Apollo.IO– Find potential customers

A platform for sales and business development. It offers a range of tools to find and engage with ideal customers.

The platform has an extensive B2B database [over 275 million contacts](#) and features that streamline the sales process from prospecting to closing deals.

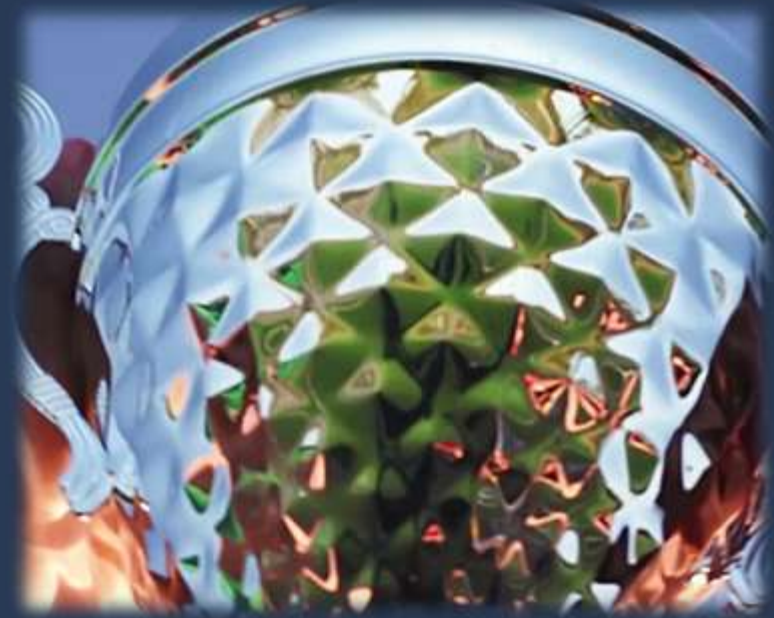
Apollo allows sales teams to optimise their strategies and achieve greater efficiency and effectiveness in their outreach efforts, [with a focus on data enrichment, lead scoring and AI-driven engagement tools](#) and CRM integration.





# Seek first to understand, then to be understood

Influence others by developing a deep understanding of their needs and perspectives.



## 3 PREDICTIVE SALES AND LEAD SCORING

- AI algorithms analyze historical data to predict which leads are most likely to convert into customer
- AI lead scoring uses predictive algorithms to evaluate and rank potential customers based on their likelihood to convert.
- Enables sales reps to prioritize their follow-up efforts
- Helps in achieving better conversion rate

# Use Cases:

HubSpot, Salesforce, Infer use predictive lead scoring a data-driven approach that uses AI and ML to assign scores to leads based on their likelihood to convert

## Key Features of AI Lead Scoring

How does AI lead scoring accomplish fine-tuning lead scoring

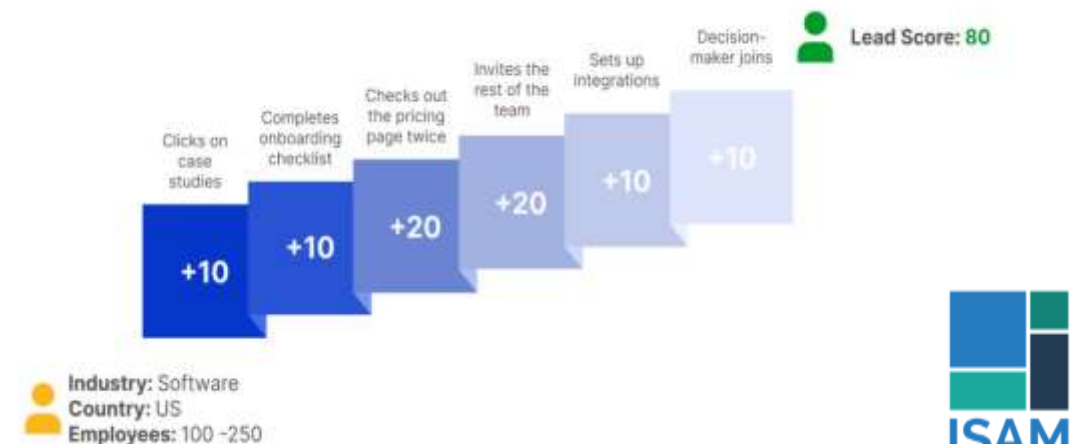
**1.Adaptive learning:** AI systems constantly learn from lead behavior..

**2.Customization capabilities:** AI helps you tailor your communications to match specific lead scores and profiles. Such personalized lead nurturing fosters greater engagement and stronger brand-customer relationships management.

## Example:

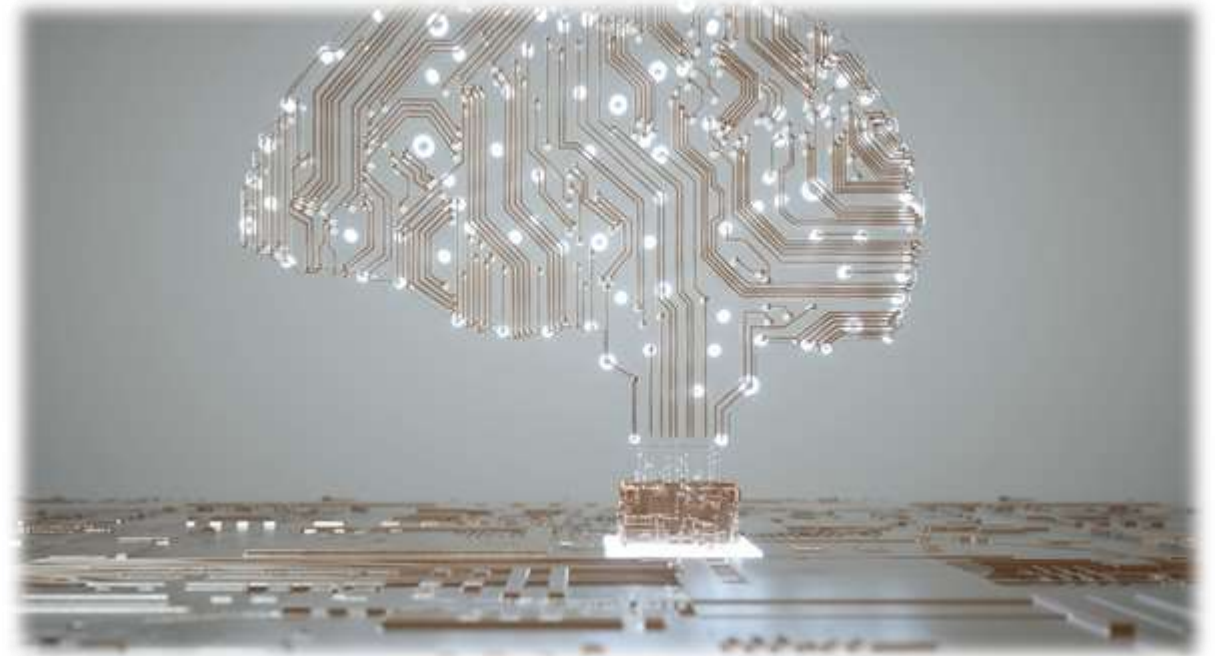
**25%** increase in conversion rates for an e-commerce site utilizing AI lead scoring\*.

\*Source: <https://jeanginzburg.medium.com/transforming-leads-with-ai-scoring-cc18284997d3>



# Think win-win

Collaborate more effectively by building high-trust relationships.

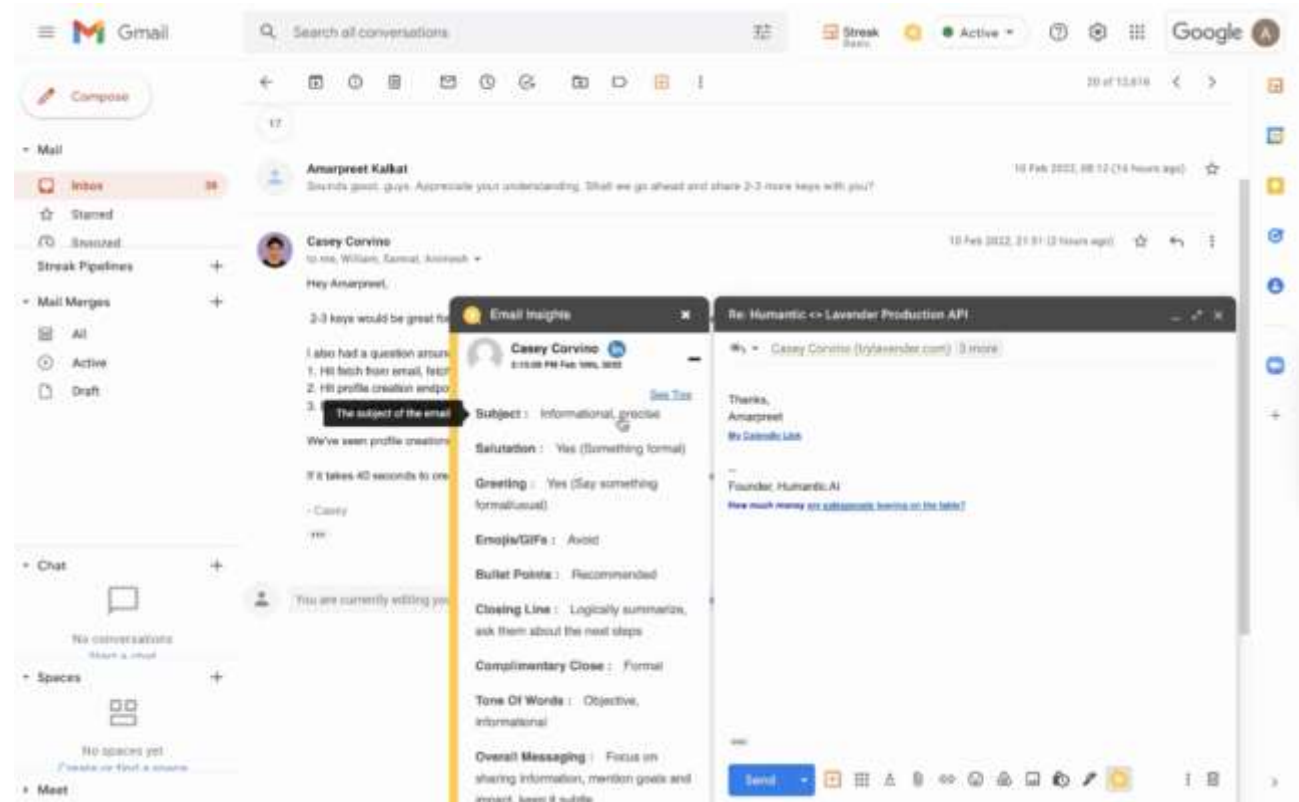


## 4 SALES CONTENT PERSONALIZATION WITH AI

- AI can personalize sales content based on individual customer preferences and behavior
- Provides insights into which content is most effective in driving conversions
- Helps in achieving a better conversion rate

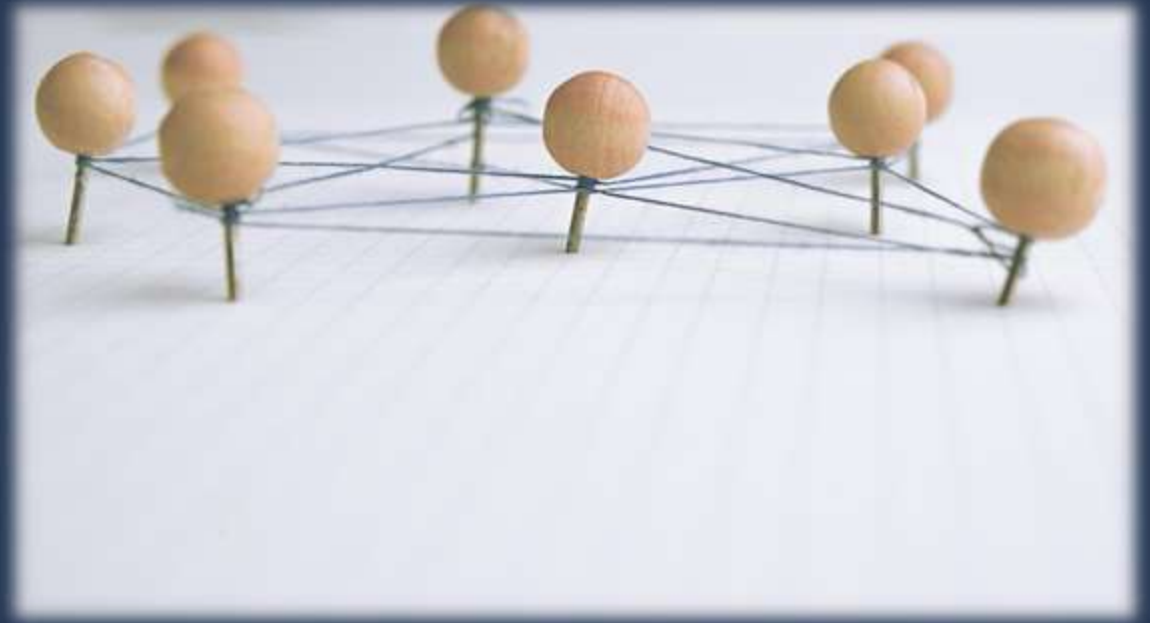
# Use Case: Humantic.ai - buyer intelligence platform

- Helps salespeople build relationships with their prospects.
- Get instant personality profiles from leads' LinkedIn pages
- AI-generated ICP and buyer personas based on engagement data
- Identify the early adopters who'll bring in 75% of your revenue



# Put first things first

Prioritize and achieve your most important goals instead of constantly reacting to urgencies.



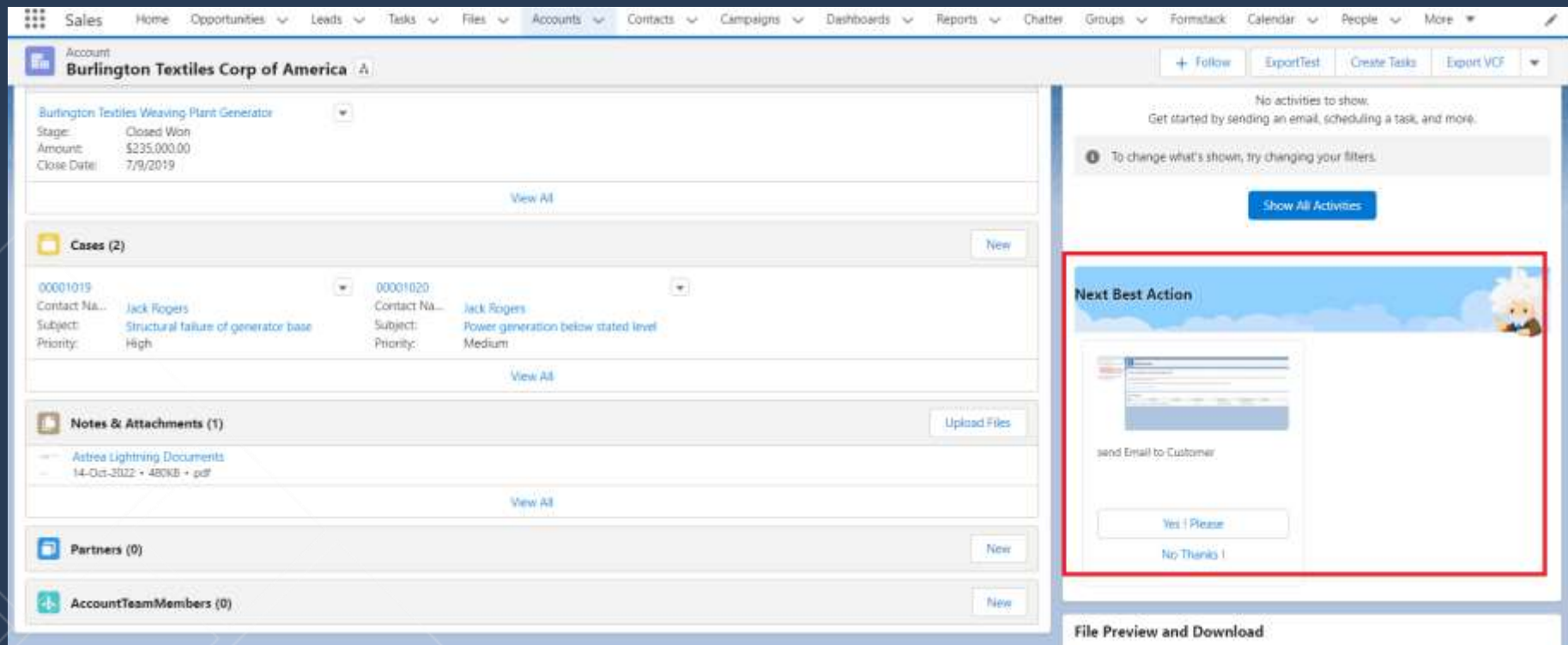
## 5 SALES REP NEXT ACTION SUGGESTIONS

- AI systems analyze communication history and recommend the next best action for sales reps
- Helps guide their interactions with prospects and customers
- Increases sales reps' productivity



# Use Case: Sales Force

Next Best Action is a feature in Salesforce that uses (AI) and (ML) to analyze customer data and suggest the best action for sales reps or service agents to take in order to engage and retain customers



## 6 AUTOMATION OF SALES DATA INPUT, MEETING SETUP ETC (AND COMPLIANCE)



# Synergize

Develop innovative solutions that leverage differences and satisfy all key stakeholders.

- AI can automate data entry tasks, reducing the administrative burden on sales reps
- Ensures accurate and up-to-date records in CRM systems
- Automatic Capturing of Expenses etc
- Saves time and effort of Sales Reps
- Keeps all stakeholders in the internal organization happy

# Use Case: copilot for office 365

Coral Gables Project Update General

Summary by Copilot

Lydia is providing an update on the progress of The Coral Gables demolition of the roof and the installation of new materials. <sup>1</sup>

There is a disagreement between Tanko and Lydia on which material to use. Lydia is asking you for an opinion on how to resolve the issue soon as possible. <sup>2</sup>

Henry is asking you if there are any roof installers with more experience worked with. <sup>3</sup>

AI-generated content may be incorrect

Lydia Bauer  
To: Katri Ahokas Henry Brill Mona Kane Tanko Larab

Hi all,

I wanted to give you an update on the latest roofing project we are working on. Our team has completed the demolition of the existing roof and the installation of the new roofing materials. We expect to complete the project next week.

The screenshot shows an Outlook interface with an email thread. The email is from Lydia Bauer to Katri Ahokas, Henry Brill, Mona Kane, and Tanko Larab. The email content is a project update on roofing work. A Sales Copilot window is open, showing a draft reply to the inquiry. The draft text is:

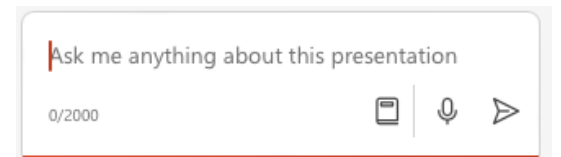
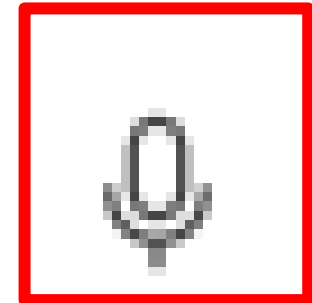
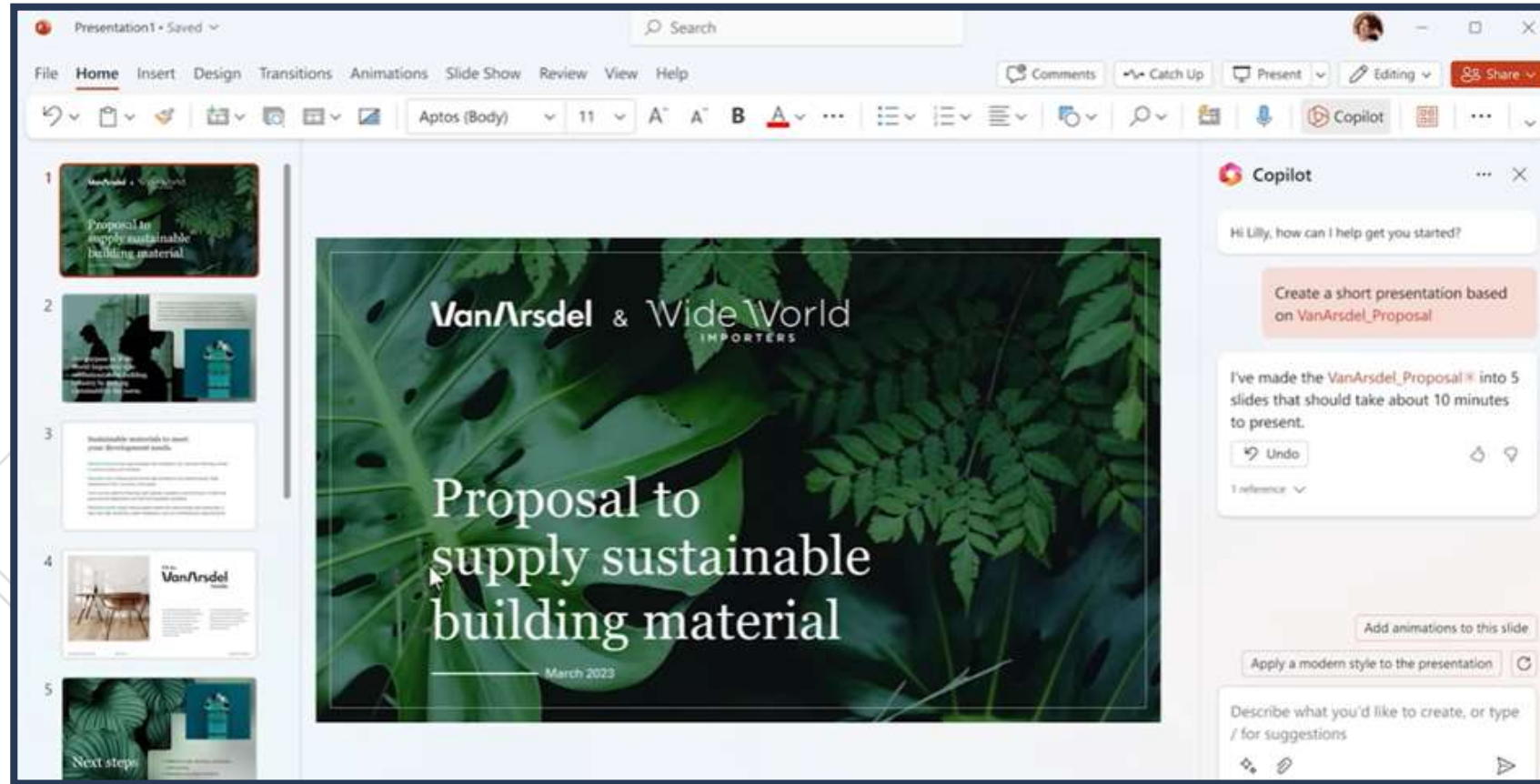
**Draft with Copilot**  
Reply to an inquiry

Hey Alberto,  
We just wanted to reach out and say that we're super excited that our eco-friendly coffee options align with your Quick Meet vision at Fourth coffee.

We know how important it is to take care of the environment and we're doing our part by using Energy Star machines that are Green Seal certified, which means they use a lot less energy than other similar machines.!

We truly believe that preserving the environment is a joint effort and we want to work together with you to make it happen.

# “Turn my word proposal into a PowerPoint, add some benchmarks”



# Use Case: Synthesia.io

- AI-powered digital assistants can create summaries of proposals and send these out as a 30 second video presentation
- Frees up sales reps' time for more strategic activities like follow up & influencing
- Increases sales reps' productivity

Source: Generated for Data to Dollars by Synthesia

## Synergize

Develop innovative solutions that leverage differences and satisfy all key stakeholders.

- **Generated Summary**
- **Machine Seller**
- **Synthetic Person**
- **Synthetic Voice**





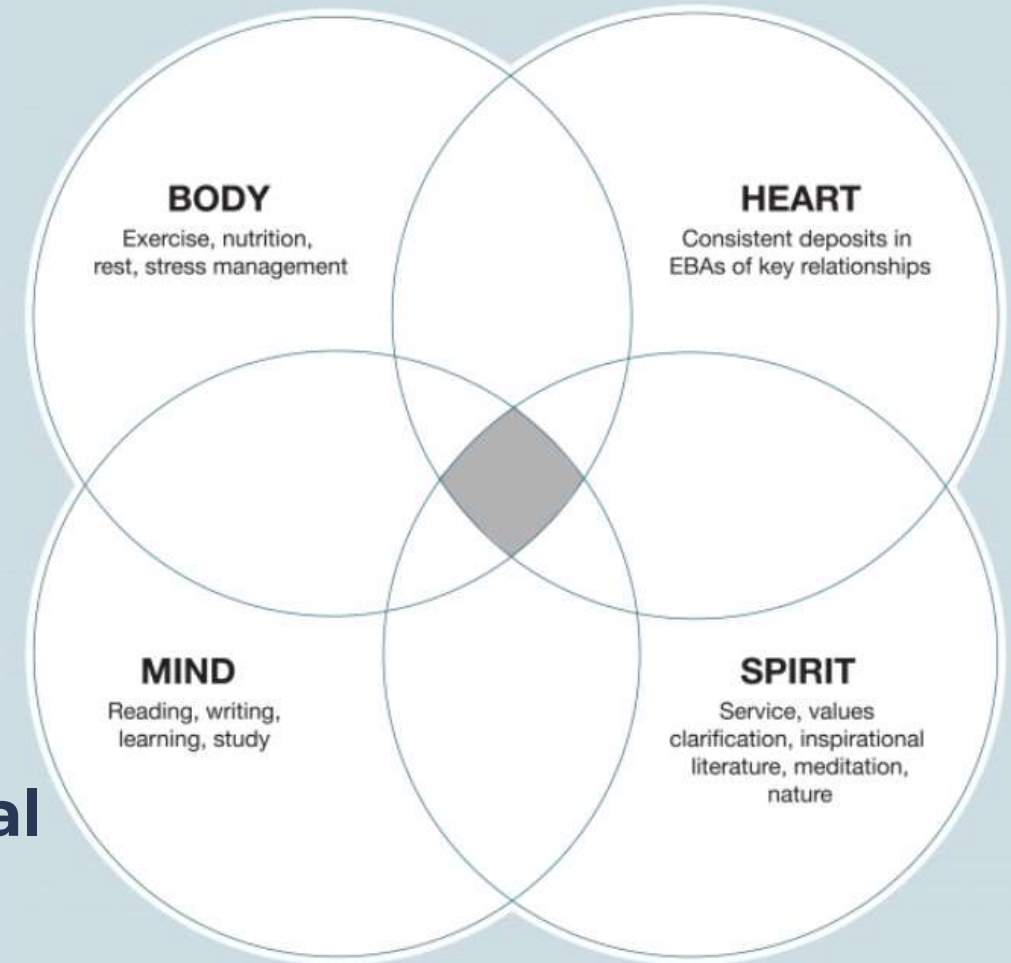
# 7 Sharpen the saw

## Feeling good doesn't just happen.

Living a life in balance means taking the necessary time to renew yourself. It's all up to you. You can renew Yourself through relaxation. Or you can totally burn yourself out by overdoing everything.

## The Habit of Daily Self-Renewal

“Renewal is the principle—and the process—that empowers us to move on an upward spiral of growth and change, of continuous improvement.”



# CONCLUSION



Our Motto Today:

**LET THE ROBOTS PROCESS  
AND THE HUMANS THINK**





In the End...

**Executive Selling still  
happens away from  
the office..."**



# Whilst creativity and story telling can be generated from everywhere...

*"create a photo-realistic scene of a selfie taken on a golf course with four characters: two salespersons and two male executives who are clearly related, all joyfully engaging in a round of golf. They're dressed in casual yet stylish golf attire, emphasizing the sport's active essence without formal wear. Add one additional character behind the character that takes the selfie, barely visible. The group represents a mix of different ethnicities, with one person wearing glasses without facial hair, another with facial hair, and one of the male characters being bald. The scene is vibrant, filled with laughter and enjoyment, under a sunny sky, with naturally balanced colours, reflecting a genuine, spontaneous moment without oversaturation."*





What would I need AI for?

# What's in it for Me?

## Customer Experience

Be a trusted advisor for your client  
(and likeable, with boundaries)

## Value Creation

Drive opportunities with different  
angles that help differentiate  
your customer



## Sales Support / Efficiency

(have a personal side kick, offloading  
the mind-numbing repetitive tasks)

## Strategic Insights

Be a trusted knowledgeable advisor  
for your customers, providing them  
with outside-in insights

# All well, but where do I start?

**Stick to the important stuff. Let AI help with the rest - by removing the mind-numbing repetitive tasks – and expose yourself to the new way of interacting with AI technology.**

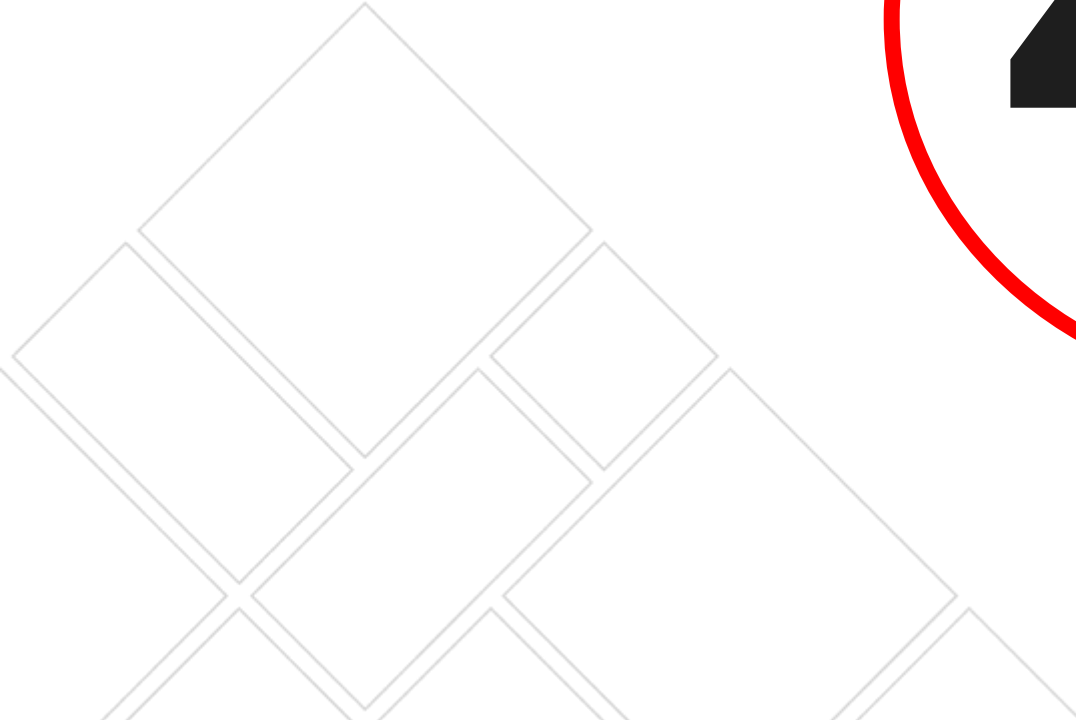
*For example, Microsoft Copilot is part of the office 365 apps that most of us use every day...*

Copilot works alongside you to help out with tedious or repetitive tasks, so you can get your most important work done, faster and easier\*

- **Catch up on Teams meetings you missed in a fraction of the time**
- **Jumpstart the creative process of drafting a Word document**
- **Quickly summarize a long email thread in Outlook**
- **Transform a document into a PowerPoint presentation**
- **Collate information and insights across your content**



**48**



**39%** of the workforce will need to **reskill** as a result of implementing AI and automation over the next three years.

Source: [Augmented Work for an Automated, AI-driven World](#), IBM Institute of Business Value, 2023

AI won't replace people,  
**but people who use AI**  
will replace people who  
don't...





“

**The Question Remains....**

”





“

**How will you Unlock the Power  
of AI to become a more  
successful sales person?**

”

“I never lose. I either win or learn.” – Nelson Mandela





# Master in Sales

Special  
AI Edition

In één dag up-to-date in hoe de beste sales professionals AI optimaal inzetten

1. Wetenschappelijk up-to-date in één dag
2. Inspiratie uit de praktijk van Industry Leaders
3. Bouwen aan je professionele network
4. Permanente Educatie (PE) certificaat

## Wanneer?

6 november 2024

Omgeving Utrecht

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Meer info?



# THANK YOU