

THE SALESPERSON'S GUIDE TO AI

HOW TO PROSPECT, PITCH, AND FOLLOW UP
SMARTER — WITHOUT SOUNDING LIKE A
ROBOT

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FOREWORD

For salespeople, by a sales professional.

I've used AI tools to secure business, not just to experiment with them, or see them as a slightly better Google. This short guide isn't for tech enthusiasts and nothing here is complex, but it will significantly improve your daily sales efforts.

It's written for B2B sales professionals who want to:

- Spend less time on admin,
- Get better at preparation and research,
- Have more effective conversations,
- Gain an edge over their competitors,
- Ultimately, enhance their performance, attract more business, and boost their pipelines.

This is not a hype piece, and there's no talk of replacing your job, or learning to code, or reinventing yourself as an "AI-powered selling machine."

What you'll find here is practical advice, examples, and prompt suggestions from someone who's sold in the real world, has used AI

tools like ChatGPT and Claude to speed up, sharpen, and support that work.

I have also collaborated with AI technical experts to distil the enormous potential of AI into actionable prompts that benefit sales teams.

You don't need to be technical, and since you can type a few words, you don't need to learn anything new.

You just need to be curious enough to try a few things that might make your sales day a bit easier and more effective.

What This Is

- A practical guide to applying AI in everyday B2B sales situations,
- Designed for humans who sell to other humans,
- Focused on practical outcomes, not purely theoretical ones.

What This Isn't

- A full introduction to AI (we're not starting from scratch)
- A replacement for good sales skills,
- A lecture on technology trends or the future of work.

If you're new to using AI tools to help and want a 60-second intro, try this prompt in ChatGPT, Claude or your AI tool of choice:

"Explain how a B2B salesperson can use you to work more efficiently. Keep it simple and give me five examples."

That's it. You're ready to use 5 valuable prompts. Now, let's explore where AI can truly boost your sales, starting with the biggest mistake most salespeople make when using it.

DON'T JUST ASK, GUIDE IT.

Better prompts, better answers — this isn't hard, but it matters.

To begin with, it is easy for a salesperson to get average responses from AI, and you have probably witnessed this happening — someone opens ChatGPT or another AI tool and types in something like:

“Write me a sales email to introduce me to a prospect.”

What comes back is technically an email, but it's flat and generic, and probably far too polite to be anything but a robot.

That's not AI's fault; it's the prompt. Too many people, let alone salespeople, treat AI like a vending machine: you punch in something basic and hope something useful drops out.

However, the real value lies in treating it more like an assistant you can brief, or even better, like a junior colleague who is very bright but needs some guidance.

This chapter explores the change in writing prompts, and you don't need special training or a “Prompt Engineer” to get what you need. The more effectively you guide AI, the more useful (and human) its output becomes. It's not about being clever with words but about being clear with your intent.

💡 **Tip:** Before we get into prompts and their results, it is important to understand that answers will vary between different AI tools; in fact, answers may differ even when asking the same AI the same question. More on that later, but it's a good thing!

The Magic Is in the Setup.

Let's begin with a straightforward comparison, and feel free to test the suggestions yourself.

Prompt A:

"Write me an email to a new lead."

The result will be a bland opener full of clichés:

"I hope this message finds you well. I wanted to reach out regarding our exciting product offerings...etc"

You've seen this wording or very similar before and so has your prospective customer.

Now try this.

Prompt B:

"Write a short, professional email to a Facilities Manager at a medium-sized logistics company. They downloaded a case study last week. Keep it human, light in tone, and reference energy efficiency, which matters to them. Suggest a short call next week."

Example Output (ChatGPT 4):

Hi [First Name],

Thanks for downloading our case study last week — I hope it gave you a few useful ideas, especially around energy efficiency improvements.

I'd love to hear what stood out to you, and whether it's worth a short call next week to see if we can help with anything similar.

Let me know what works for you.

Best,

[Your Name]

Suddenly, the response becomes sharper, more relevant to the customer, and much more like you! We will soon focus on improving the AI tool and achieving even better results, but you can already see the difference.

Same AI, but a much better brief.

BE THE BOSS. Not the Bystander.

Think of AI like a junior member of your team. If you asked them to "just write something," you wouldn't be surprised if it came back bland. You'd coach them, provide context, and encourage clarity in their response to you.

The same applies here. Begin applying the same commercial mindset you'd use in your actual work.

- **Who is the reader?** Role, industry, seniority
- **Why now?** Trigger event, recent action
- **What tone?** Casual, confident, consultative
- **What do you want back?** An outline, draft, list of options?

You're not asking for anything magical; you're giving AI direction and context to get the best possible response.

PROMPT TIPS THAT ACTUALLY WORK.

Here are a few quick shifts that make a real difference:

a) Instead of saying...

b) Try saying...

a) "Write an email"

b) "Write a short follow-up email to a customer who hasn't replied in 10 days. Keep it friendly, slightly informal, and focused on reopening the conversation."

a) "Summarise this"

b) "Summarise this sales call transcript into bullet points with actions for the salesperson. Keep it concise and customer-focused."

a) "Give me objections"

b) "Act as a Procurement Director at a construction firm. I've just proposed a 12-month contract. What concerns might you raise?"

These small adjustments enable AI to think like your customer or coach and deliver much better responses.

PUSH BACK. Ask for Better.

A lot of people don't realise: **you're allowed to challenge the AI.**

If a response feels off, tell it. Ask:

- "Make that more concise."
- "Rewrite with a firmer tone."
- "Drop the buzzwords."
- "Try again, but aim it at a technical buyer."

You're the editor, and unlike a junior assistant, there is no risk of the tool getting offended. You wouldn't accept a lazy draft from someone on your team. Don't accept one from your AI assistant either. Just give the direction and context a junior would need.

TRY This

Use this single sentence as a base prompt and modify as needed:

"Act as a smart sales assistant. I'll give you some context, and you'll help me write, prepare, or role-play for real B2B sales situations. Ask clarifying questions if needed."

Once that base context is established, you can continue adding details. You can ask AI to perform a variety of tasks, and the tool understands the context. You have granted AI permission to seek further information. As an example, the next prompt you might use could be a request to assist with a prospect.

“I’m about to contact a mid-sized engineering company I’ve never spoken to. Write a short, human-sounding intro email that opens the door to a first call — and make it sound like me: no fluff, just value.”

Start small, test it, and adjust it.

The more you treat AI like a thinking partner, the better your outcomes will be; you just need to give whichever tool you are using clear direction and context.

You’re in charge, so lead it as if it were a junior assistant and teach it. It will soon become a senior assistant, helping you perform better and more efficiently.

In that last prompt, we asked AI to “sound like me,” and that’s another area frequently overlooked by new AI users. When you request AI assistance with communicating to customers, such as emails, proposals, and presentations, it’s crucial that it sounds human and preferably like you.

That’s what we will cover next.

MAKE IT SOUND LIKE YOU

How to write with AI and still sound like a real human — you.

Some of the stuff that comes out of AI tools reads like it was written by someone who's been through too many corporate training videos.

It can be overly polite, too formal, and full of phrases you'd never use in real life — or phrases that you should avoid. Risking upsetting English teachers, I dare say the grammar can sometimes be overly correct and limited in style. Additionally, the repeated use of clichéd phrases requires attention.

"I hope this message finds you well."

"I'd like to take a moment to introduce our company's unique value proposition."

"Please don't hesitate to reach out with any questions."

You understand the point. But the good news is that you can address these issues, and quickly, without fuss.

This chapter is all about setting the tone, adjusting the output, and making AI sound more like *you* (or at least, more like a human who sells for a living).

WHY TONE MATTERS in B2B

You don't win meetings by sounding generic, and you don't build trust by sounding like a brochure.

Whether you're writing a follow-up email, a LinkedIn message, or a short proposal summary, the tone you use matters.

In a crowded inbox or noisy market, your voice is one of the few differentiators you've got. Even when AI helps you write, it needs to sound like *you meant it*.

Set the Ground Rules Early

One of the easiest ways to improve tone is to give guidance right from the start. Try this early in your prompt:

"Keep the tone friendly, human, and direct — like a professional salesperson who's good with people."

Or even:

"Write in a tone that sounds like me: confident, conversational, and never too pushy."

You can even paste in something you've written before, an email, for example that you feel was well written, and say:

"Match the tone of this email I wrote last week. This is how I normally speak. [insert email here]"

AI will then try to mirror your style, sentence length, phrasing, and level of formality. It's surprisingly effective. You can copy and paste, or use the + in the prompt box to upload a document you have written and adjust the prompt above accordingly.

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EXAMPLE: Making It Sound Like a Person**Prompt:**

“Write a short follow-up email to a potential customer who hasn’t replied in 10 days. Make it sound like a real person — slightly informal, polite but not stiff. Keep it under 100 words.”

Example Output (ChatGPT 4):

Hi [Name],

Just checking in to see if you’ve had a chance to review the information I sent last week. Happy to chat if you’ve got questions — or if now’s not the right time, just let me know.

Cheers,

[Your Name]

THAT’S NOT BAD, and if it feels too soft or too firm for your style, ask for another version; just give AI some direction.

Those of you who have read my book *The Sales Reset* will know that I would add value to any follow-up email of this sort, so I would alter the prompt to read something like:

“Write a short follow-up email to a potential customer who hasn’t replied in 10 days. Make it sound like a real person — slightly informal, polite but not stiff. Keep it under 100 words. Mention our case study on how our widgets save energy for companies in their field and the cost savings enjoyed. Steer clear of cliched phrasing”

That output read as follows:

Subject: Saving costs with energy-efficient widgets

Hi [First Name],

I wanted to follow up to see if exploring energy savings is still on your radar. I've attached a quick case study showing how companies in your field are using our widgets to cut energy usage and significantly lower costs.

It would be great to hear what kind of savings you're aiming for this year; we might be able to help get you there.

Looking forward to your thoughts,

Cheers,

[Your Name]

Once again, you can customise it to your style, and my AI response above was based on my own tone settings and the style of many documents I have asked AI to review.

Push It Toward *Your Voice*

Tone isn't just about being casual or formal. It's about the little things:

- Do you use contractions? (“We’re” vs. “We are”)
- Do you sign off with “Cheers,” “Thanks,” or “Best”?
- Do you ask open-ended questions or keep it brief?

You can give AI small nudges, like:

“Try again, but use shorter sentences and a slightly cheekier tone — like someone who’s confident but easy to talk to.”

Or:

“Make this sound like something I’d actually say after a real meeting — not like a marketing email.”

It learns quickly. And if it doesn't? Just tell it why and ask for a rewrite. Just play with it; the AI itself will often suggest other tone or style options.

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⋮ A Further Note on Output Variation. Depending on which AI you use (ChatGPT, Claude, Gemini, etc.), your results might vary slightly, even with the same prompt. That's normal. Even the same tool can produce different responses from one day to the next. These tools learn and adapt constantly. Don't worry about getting an exact match to what's shown here. What matters is whether the response feels right for you. If not, adjust and carry on.

THE GOAL IS *NATURAL*, Not Perfect

Most people can recognise something written by AI, not because it's incorrect, but because it simply doesn't feel like it was produced by a person.

You don't need to fake authenticity; you just need to guide it. Use your voice, and by providing AI with examples of your writing style will help immensely.

Use your common sense, and if something feels wrong, it probably is, that's your instinct speaking. We'll revisit this in a later chapter.

AI can write your emails, messages, proposals and call summaries. But only you can make them sound like they came from *you*.

Begin by setting the tone and using relevant examples as needed. Don't hesitate to request rewrites; you are in control, and the more you correct, the better the outcome becomes.

PROMPT SUMMARY: Make It Sound Like You

Here are some quick-start prompts and tweaks to help your AI output sound more human and more like *you*.

► Setting the tone clearly

“Write in a friendly, human tone — like a confident salesperson who’s good with people.”

“Keep it conversational but professional. No stiff formalities.”

► **Reference your own style**

“Here’s an email I wrote. Match this tone and phrasing.”

“Write this in my voice: concise, slightly informal, and not too ‘salesy’.”

► **Rewrite when it feels off**

“Try again, but make it sound more like a real person. Less polished, more natural.”

“Make this feel like something I’d say to a customer I’ve already spoken to once.”

► **Tweak for personality**

“Use contractions, avoid buzzwords, and keep it under 100 words.”

“Make it warm but direct. Friendly, not overly familiar.”

“Add a touch of humour, like someone who doesn’t take themselves too seriously.”

 **Tip:** You can stack prompts — give tone + context + objective in one go. The more specific you are, the better the result.

EXAMPLE of a Stacked Prompt

“Write a short follow-up email to a Procurement Manager in the construction industry. They downloaded our energy-saving case study last week but haven’t responded. Keep the tone human, not salesy — friendly but professional, like someone who knows the sector and respects their time. Use contractions, avoid buzzwords, and aim for under 100 words. End with a gentle suggestion to reconnect next week.”

Why it works:

- **Role + industry** gives context.
- **Recent action** gives a reason for the message.

- **Tone + personality** gives stylistic direction.
- **Length + language style** keeps it sharp and readable.
- **Call to action** adds purpose without pressure.

This kind of prompt helps AI deliver something useful on the first go, or at least something very close.

Useful when a little more detail is needed to guide AI in research and your prospecting, which is next.

SMARTER PROSPECTING

Use AI to prep faster, research deeper, and open with relevance.

A new lead lands in your inbox, or a company has come to your attention.

You could Google them, browse their website, check LinkedIn, look at government portals for business data, industry news, and so on. There are many resources available, but little time for the typical salesperson to explore them thoroughly.

AI won't replace your sales judgment, but it can considerably cut down the preparation time when researching prospects and improve the insights you bring to your initial contact efforts.

That's what this chapter is about: using AI to make your prospecting faster, smarter, and more relevant.

Start with the Context

If you just type "Tell me about XYZ Ltd" into ChatGPT, you'll likely get something vague, maybe out of date, and probably pulled from a basic company description.

But if you frame your request properly, AI can surface useful commercial insight in seconds.

Here's a simple example of a better, stacked prompt:

“Give me a brief summary of XYZ Ltd, a logistics company based in Leeds. Focus on what they do, who they sell to, and any recent industry activity or trends that might affect them. Keep it short and relevant to someone preparing for a B2B sales call.”

That’s a big step up from a simple company search; try it on a company you know little about, adapt it to your territory or country and see the results.

You’ve given the tool a purpose, and it responds accordingly. You can, of course, expand this by requesting the basic financial results for the last three years, for example. Can you find the name of the Engineering or Technical Director, etc., etc.?

If the AI doesn’t find much trend data? Ask it to check competitors or comment on broader market trends instead.

 Tip: A great use of AI is the broader investigation of your competitors and customers. You can gather a lot of detail very quickly.

Profile the Buyer’s Role — Not Just Their Title

One of the fastest ways to improve prospecting is to understand what someone in that role actually *cares about*.

You already know there’s a difference between talking to a Procurement Manager and a Sustainability Lead. But most prospecting emails don’t reflect that. They just blast the same pitch to both.

AI can help you write smarter by providing insight into the objectives of different roles.

Prompt Example:

“What are the main priorities and challenges for an Operations Director at a mid-sized manufacturing firm in the UK? Keep the answer short and practical — I’m preparing for a prospecting call.”

You can go one step further, adding more to your stacked prompt:

“I’m about to call a Head of Procurement at a construction company. They’ve downloaded a cost-reduction guide from our site. Write a quick summary of what this role typically focuses on, what concerns they’re likely to have, and how I can position value in that context. Keep it focused on B2B buying decisions.”

This kind of insight makes you sound like someone who understands their world, not just someone pushing a product. Of course, you can further enhance the response by including the company details, etc.

GET HELP with First Contact Messages

Once you’ve done the research, it’s tempting to overuse it, to write a long, heavy intro that proves you’ve done your homework.

Don’t.

Instead, use what you’ve learned to say *less*, but make it count. One or two specific references are enough to show you’re not guessing:

“Write a short LinkedIn message to a Technical Manager at a food manufacturing company. I want to reference a recent industry article they shared and suggest a quick intro call next week. Keep the tone confident and professional — no over-explaining.”

Again, you’re guiding the output by:

- Giving a job title and sector
- Mentioning a real-world trigger (an article)
- Stating your purpose
- Defining tone

This is prospecting with purpose, not just outreach by numbers.

DIG FOR INSIGHT, Not Just Data

If you're trying to break into a new sector or region, use AI to get up to speed fast. You might ask:

"What are the biggest challenges currently facing the logistics sector in the UK, especially for warehouse and fleet managers?"

Or:

"What would keep a Head of Engineering at a large US utilities provider up at night in 2025?"

Even if you get broad answers, they're often more useful than pages of raw data. They give you angles, hooks and conversation starters.

That's what you're after in early prospecting, and many of the answers will enable you to dig further with a new prompt.

PROSPECTING ISN'T JUST about finding names, it's about uncovering ways in. When used well, AI can provide a quicker, sharper view of your prospect's world, ensuring that what you say in those early moments truly resonates.

You're not outsourcing your thinking either; you're enhancing your preparation. It will lead to more effective email introductions, LinkedIn messages, and connection requests.

Use these prompts to research more efficiently, prepare more intelligently, and craft more targeted outreach messages. Adapt to your industry, existing knowledge etc.

► **COMPANY INSIGHT**

“Give me a short summary of [Company Name], a [type of company] based in [location]. Focus on what they do, who they serve, and any recent market trends that might affect them. I’m preparing for a sales call.”

► **Role Awareness**

“What are the main concerns and priorities of a [Job Title] at a [type of company]? Keep it short — I’m prepping for a prospecting conversation.”

“Act as a [role] at a [sector] firm. What kind of value would catch your attention in an initial message?”

► **First Contact Message**

“Write a short LinkedIn message to a [Job Title] in [sector]. Reference [trigger event or shared content], keep it human and direct, and suggest a short intro call.”

► **Industry Trends**

“What are the current challenges in the [sector] industry, especially for [specific roles]? I’m building context for prospecting.”

“Summarise the top issues facing [role] in [year] — give me bullet points I can use in a sales call.”

► **Go Deeper: Stacked Prompt**

“I’m about to contact a [Job Title] at a [sector] company. They downloaded our [resource] last week. Write a short, relevant email that reflects their role, keeps the tone natural and confident, and suggests a short call. Avoid clichés and get to the point.”

 Tip: If the first output feels off, ask: “Try again, but make it more concise and less generic. Focus on their likely priorities.”

AI AS YOUR PRACTICE PARTNER

Uncover objections, rehearse meetings, and get sharper every time.

Sales is one of the few jobs where you're expected to perform live, often without a warm-up, without a second take, and with no room to wing it.

You get one opportunity to handle the objection, one chance to clearly explain the value, and that single shot at the introduction that can either gain you 20 minutes or close the door.

As I often tell salespeople, they should practise, and most, I am sorry to say, don't.

This is not because they're lazy, but because it feels awkward. Often, there is no one to practise with, at least no one they would choose to practice with. And just as often, they don't know where to start.

That's where AI becomes unexpectedly helpful. You can use it to role-play, rehearse, test ideas, uncover objections and even refine your messaging, all without needing a manager, a peer, or a whiteboard.

THE ROLE-PLAY You Don't Have to Schedule.

Let's say you've got a big meeting coming up with a Technical Director. You want to run through your elevator pitch or test a few ways to frame value.

You could stare at your laptop, practice in front of a mirror or try your dog.

Or you could do this:

"Act as a Technical Director at a manufacturing company. I'm about to present a solution that helps reduce downtime through predictive maintenance. Ask me 2-3 questions you'd naturally raise. Keep it realistic and challenge me a little."

You'll get questions, some sharp and some awkward. Often, they will be exactly what you should have expected, but perhaps didn't anticipate, and occasionally, questions you hadn't foreseen. Either way, the practice is valuable; it will help your answers in real-life situations to come out more naturally.

Now flip the script and become even better prepared:

"Here's how I'd answer that last question. [copy answer here] Now critique my response — is it clear, relevant, and compelling? Suggest a tighter version if you can. Provide direct and truthful critique"

Now you're not merely role-playing, you're coaching yourself. And it's surprisingly effective when you approach it seriously, especially when it helps you practise responding to objections.

💡 Tip: Don't let AI flatter you! It's built to be polite unless you tell it to be honest. Example add: "Be brutally honest — don't hold back." That's how you get honest feedback, not empty praise.

OBJECTION HANDLING PRACTICE.

This is especially helpful for new salespeople or anyone starting a pricing discussion.

You can ask AI to challenge you with objections based on the type of buyer, their industry, or a specific proposal, just remember to include the context in your prompt:

"Act as a Procurement Manager at a utilities firm. I've just proposed a 12-month SaaS contract with a 10% increase over last year. Raise three objections you'd typically have, and I'll try to respond."

You can type your answers and get feedback, or just use it as a drill to help you think on your feet, say it out loud, then reflect.

It's not about achieving perfection, but about observing how your thinking withstands pressure, even if only slightly simulated.

TIGHTEN YOUR VALUE PITCH.

You can also ask AI to help test and refine your pitch, the short, punchy way you explain what you do and why it matters.

Let's say you usually say something like:

"We help companies reduce unplanned downtime using predictive analytics and remote monitoring."

You can challenge that:

“Here’s how I usually describe our offer. “We help companies reduce unplanned downtime using predictive analytics and remote monitoring.” Rewrite it in a way that focuses more on the outcome and speaks directly to an Operations Director under pressure to reduce costs.”

Or:

“Give me three alternative ways to pitch this — one concise, one casual, one bold.”

Now you’ve got new angles. Perhaps even a better way in.

CHEAT WITHOUT CHEATING: Build Your Pitch Library.

There’s no shame in building a library of short pitch options for various roles or buyer types, and AI can assist in creating it more quickly.

You can prompt:

“Create a 2-sentence version of our value proposition for a CFO, a Head of Operations, and a Health & Safety Manager. Make each one specific and focused on their priorities.”

Test them, adjust and then store them. The more prepared you are, the less likely you are to freeze when the pressure hits.

Not many people enjoy practising out loud in an empty room, and not every manager has time to rehearse with their team.

But AI doesn’t mind if you ask five times, make mistakes, or attempt a few awkward responses before getting it right.

It's available 24/7.

It won't laugh at your wording, and if you use it with intention, it might just become the quietest and most patient coach you've ever had.

PROMPT CHEAT SHEET: AI as Your Practice Partner.

Use these prompts to role-play, rehearse objections, and refine your pitch—no scheduling needed. Remember, you can personalise any of these and finesse them to suit your style.

As with all the prompts in this guide, they serve as starting points for you to expand upon. Experiment with them and tailor them to your preferences. Use the free download that comes with the book and copy and paste to save a bit more time! :-)

► **ROLE-PLAY a Buyer Conversation**

"Act as a [Job Title] at a [sector] company. I'm about to pitch a solution related to [topic]. Ask me 2–3 natural questions you'd raise if you were hearing this for the first time. Make it realistic, and don't make it too easy."

► **Challenge and Improve My Answer**

"Here's my response to that last question. Critique it from the buyer's perspective — is it clear, relevant, and convincing? Suggest a stronger version if needed. Be brutally honest and don't hold back"

► **Objection Handling Drill**

“Act as a [role] who’s just been shown a proposal for [product/service]. Raise three common objections, especially around [price/change / timing]. I’ll respond.”

► **Tighten My Pitch**

“This is how I normally describe our solution. Rewrite it for a [role], focusing more on outcomes and urgency.”

“Give me three ways to pitch this — one concise, one casual, and one bold.”

► **Build a Pitch Library by Role**

“Create a two-sentence version of our value proposition for the following roles: CFO, Head of Operations, Health & Safety Manager. Make each one specific to their priorities.”

 **Tip:** Don’t try to get it perfect first time. Try, review, ask for better — that’s the whole point of practice.

THE ART OF THE NUDGE

Follow up without chasing. Say something that earns a reply.

Waiting is never enjoyable, whether it's at the supermarket, the doctor's, or after a great meeting. The proposal was sent out with a promise of "we'll get back to you early next week" and it's now Wednesday just after lunch.

You don't want to pester but you also don't want to wait forever, and neither does your Manager.

This is where many deals stall, not because the solution's wrong, but because the follow-up loses momentum, tone, or timing.

AI can help here, and not by sending robotic nudges, but by helping you craft follow-ups that feel human, helpful, and forward-moving.

FOLLOW UP WITHOUT SOUNDING DESPERATE.

You don't need to write a long justification or offer a discount.

You just need a message that gently reopens the conversation and gives the customer a reason to respond.

Here's how to get help writing it:

“Write a short, friendly follow-up email to a customer who received a proposal 10 days ago and hasn’t responded. The tone should be natural and respectful, not pushy, and a quick reminder of the value without repeating the full pitch. Suggest a quick check-in call or ask if their priorities have changed.”

AI will give you a good starting draft. If it still feels too robotic, ask it to rewrite it in a voice that’s “confident, human, and respectful of their time.”

You can also push AI to tighten the message or add a question at the end to prompt a response from your customer, something like:

“Is this still something worth keeping open?”

“Would it help to simplify next steps?”

These little nudges can make the difference.

REFRAMING the Value (When It’s Gone Cold).

Sometimes you just know the proposal didn’t land. You feel it, maybe in the buyer’s tone, maybe in the silence that followed.

AI can help you reframe the message:

“Help me write a short email to reframe the value of our proposal for a CFO who seemed lukewarm on our initial pitch. Focus on long-term savings, reduced risk, and the strategic benefits of early action.”

You can even ask AI to:

- Compare your offer to doing nothing
- Translate features into measurable outcomes
- Provide a new way to position the same idea for a different

audience (e.g. shifting the language from technical to financial)

It's not about cheating; it's about refining. It's also a clever way to get ready for internal discussions the buyer might be having on your behalf.

Message Variations for Different Roles.

When you're dealing with a buying group, the same email won't work for everyone.

A Procurement Manager wants clarity.

A Sustainability Lead wants alignment.

A COO wants outcomes.

AI can help you adapt a single message into multiple versions quickly:

"Create three short follow-up emails based on the same proposal: one for the Procurement Lead, one for the Operations Director, and one for the ESG Manager. Each should reflect their likely priorities and suggest a next step."

You can use this technique to tailor your message without having to rewrite it from scratch every time.

And again, review the results. Ask yourself, *"Would I actually say this?"* If not, adjust the tone or phrasing. You're still in charge!

QUICK WINS MID-DEAL.

AI can also help with smaller moments during the deal process — tasks that often consume time or mental energy.

Try prompts like:

"Summarise this call transcript into key takeaways and action points — keep it sales-focused."

“Draft a response to a customer who’s asked to ‘leave it with them for a few weeks.’ I want to acknowledge the pause, stay warm, and keep the door open.”

“Suggest three ways to politely ask if there’s an internal blocker holding up a decision — without sounding impatient.”

These aren’t just admin tasks; they are a crucial part of keeping deals alive, without coming across as pushy, vague, or repetitive.

AI can’t make the customer decide, but it can help you stay relevant, present, and professionally persistent, even when things go quiet.

Sometimes, one well-written sentence is all it takes to restart the conversation, and AI, with the right guidance, can be uncannily good at providing them.

 **PROMPT CHEAT SHEET: Follow-Ups and Deal Support.**

Use these prompts to follow up without being pushy, reframe value when things go quiet, and tailor your message to different stakeholders.

► **FOLLOW-UP After Proposal Sent**

“Write a short, friendly follow-up email to a customer who received a proposal 10 days ago. Make it respectful, human, and lightly remind them of the value. Suggest a quick call or ask if priorities have shifted.”

► Reframe the Message for a New Angle

“Help me rewrite a follow-up email for a CFO who didn’t seem impressed with our original pitch. Focus on long-term savings, risk reduction, and strategic benefits.”

► Adjust Tone or Tighten Message

“Rewrite the above email in a tone that’s confident, clear, and human — no fluff. Keep it under 100 words.”

► Follow-Up Variations by Role

“Create three different follow-up emails for the same proposal: one for a Procurement Manager, one for an Operations Director, and one for a Sustainability Lead. Each should reflect their role’s priorities and suggest a next step.”

► Handle the ‘Leave It With Me’ Stall

“Draft a polite reply to a customer who said ‘Leave it with me for a few weeks.’ Acknowledge the delay, stay warm, and keep the door open.”

► Ask About Internal Blockers (Tactfully)

“Give me three ways to ask if there’s an internal blocker holding up the decision — without sounding impatient or pushy.”

► **Summarise a Sales Call**

“Summarise this transcript into key action points and value moments. Keep it short and sales-focused — not a meeting minute.”

 Tip: Even if the AI gives you a strong draft, make small edits to bring it into your own voice. A few tweaks can make a big difference.

AI AS YOUR SILENT ASSISTANT

Prompt once, win quietly — especially when things get hectic.

There's a difference between what you *should* do and what you *actually* do when the pressure's on.

You should stay up-to-date with industry news and monitor competitor activity.

You should scan for tenders or job changes that signal opportunity.

You should review your own week and check your pipeline for gaps.

However, when deals are live, meetings are piling up, and your calendar is full, much of it can easily be pushed aside. And if many of you are honest, it's not something that excites most salespeople, even when they have time. For one thing, there can be a lot of effort spent establishing what's not relevant.

This chapter isn't about full automation. It's about building simple, repeatable prompts you can run weekly or monthly, so you never fall too far behind, even when you're flat out.

AI doesn't forget, it doesn't need a break, and it certainly doesn't mind being asked the same thing every Monday morning.

WHAT YOU CAN PROMPT ONCE A WEEK (or Once a Month)

Below are repeatable prompt ideas for B2B salespeople. Each takes seconds to run but provides valuable information you might otherwise have to search for (or more likely, ignore altogether). And as we all know, there is gold in all those press releases, tender invites, awards, job adverts, etc.

1. Check for Industry News

“What are the main news updates this week affecting the [sector] industry in the UK? Focus on issues that would concern procurement or operations teams.”

You can narrow by region, topic, or job function. Do this on a Monday and you’ll start your week better informed than most of your competition.

2. Scan for New or Awarded Tenders

“List any new or recently awarded tenders in the last 30 days related to [product or service] in [region or sector]. Include contract names and awarding bodies if possible.”

You won’t always get perfect data, but you’ll often find leads, patterns, or even competitor wins you can act on.

This is particularly useful if you are a second or third tier supplier and not eligible for the tender portals....but the info is essential.

. . .

3. Look for Job Changes and Team Movements

“Have there been any leadership or senior role changes in the [industry] sector over the last month? Focus on Head of Operations, Procurement, and Technical roles.”

Job changes often mean fresh priorities. And new people are more open to change.

4. Track Competitor Activity

“Give me any recent news or updates from the past month about [competitor name], especially relating to product launches, customer wins, or expansion.”

It's an easy way to stay sharp, without relying on hearsay or digging through press releases.

5. Monitor Compliance and Regulatory Shifts

“Are there any upcoming changes in regulation or compliance likely to affect [industry] buyers in [region] in the next six months?”

This is a powerful way to uncover hidden triggers. If something's going to change how your customer operates, you should know about it before they do.

. . .

6. Review Your Own Sales Activity

Yes — AI can even help you think more clearly about your own week.

“Here’s what I did this week: [Insert quick summary]. Based on this, give me reminders, red flags, or follow-up ideas I might be missing. Keep it practical.”

Think of it as a personal sales health check!

Save Your Prompts. Run Them Fast.

Once you’ve built a few of these prompts, save them somewhere simple — in a Notes app, on your CRM dashboard, in a calendar reminder, wherever.

Then run them:

- Every Monday morning (news, tenders, job changes)
- On the first of the month (competitors, compliance, pipeline gaps)
- Or anytime you feel out of the loop and need a sharp re-entry

You’ll stay informed.

You’ll spot opportunities earlier.

And you’ll avoid the classic excuse: “I didn’t have time.”

MOST SALESPEOPLE DON’T FAIL because of the big stuff, and certainly not a lack of hard work. They fall behind on the basics, the tasks that keep them sharp but don’t shout for attention.

AI can’t run your calendar — yet. But it can give you five minutes of clarity that saves five hours of catch-up later.

Make it your silent assistant, and make that discipline part of your edge. Think of the useful information you can get by running a few standard prompts once a week or so?

 Tip: Run these prompts on a schedule — add a recurring calendar reminder to keep the habit alive. AI works best when it becomes part of your rhythm.

YOUR BACK POCKET PROMPTS

Ready-made prompts for follow-ups, emails, and when you draw a blank.

If you've made it this far, you've already got a solid feel for how AI can support your sales work, from first contact to follow-up, from prep to reflection.

But the real magic starts when you stop copying prompts and start building your own.

This chapter is here to help you do exactly that.

MAKE IT YOURS.

The prompts in this book are designed to be flexible, but your customers, your style, and your sector are specific.

That's why the next step is to **save, tweak, and personalise** the prompts that actually work for you.

Set up your own "Prompt Toolkit" with sections like:

- Prospecting

- Role research
- Objection practice
- Email follow-ups
- Pitch sharpening
- Monthly check-ins
- Competitor tracking

Each one can start with a base prompt, and evolve over time.

The goal?

Well, essentially, that is down to you and how you develop your prompts in relation to your objectives. Ultimately, I hope that your AI skills will lead to an improved pipeline, a career boost, and more time to develop your business.

But AI really can be your assistant in so many aspects of your job. I am yet to find anything of note that it cannot contribute to in some meaningful way. And it is easy!

Once you get involved in using it, and you feel unsure or stuck, ask it!

Stuck on a follow-up email, ask it:

"This is my second follow-up and I'm dangerously close to writing 'just checking in.' Save me from myself — how do I follow up without sounding like every other sales rep in their inbox?"

I hope you are getting the message, AI will help you let AI help you, just ask it if you get writers block! (I do)

Add These to Your Toolkit.

Here are a few high-value, often-overlooked uses you might want to include:

► **SUMMARISE LONG or Technical Documents.**

“Summarise this technical report for a non-technical salesperson. Highlight key points a customer might challenge or care about.”

“Pull out the most commercially important details from this 40-page tender spec. Focus on deadlines, requirements, and pricing risks.”

“Summarise this company’s annual accounts. Are they spending, cutting back, or looking for efficiency? Mention anything that affects potential projects.”

You still need judgment, but this saves hours of reading or skipping.

► **TURN PAST Wins into Future Prompts.**

If you’ve written a great email, landed a tricky meeting, or handled an objection well, **don’t lose it.**

Save the tone, structure, or idea and use it like this:

“Here’s an email I sent last week that worked well. Use this tone and style for future outreach messages to similar roles:[insert email text here]”

“This is how I explained our value to an Engineering Director. Turn this into a reusable version I can adapt for other industries: [insert text here]”

Your best material already exists; AI just helps you scale it.

💡 **Tip: Save Your Style.** In free or temporary chats, AI forgets your tone every time so reset. With ChatGPT Plus (paid), use Custom Instructions to lock in your tone, writing style, or sales voice, so every chat sounds like you.

► **PRE-BUILT FOLLOW-UP LIBRARIES.**

You can ask AI to help you build short libraries of go-to follow-ups, such as:

- “What to say when a prospect has gone quiet”
- “How to politely prompt a decision without being pushy”
- “How to respond when a buyer says they’re reviewing other options”

These can live in your notes, CRM, or email templates — ready for whenever you need them.

TIP: Save Your Prompts Where You Work.

Don’t overthink the system. A single note or word file, a pinned doc in your CRM, and maybe a PDF backup just in case

The goal is simple: when you hit a wall, you want prompts to generate *your own words* ready to unlock the next step.

THERE’S NO PERFECT PROMPT, but there’s a better one than the one you used last time, and you can build it now, for next time. The ones in this guide are great, but I have no doubt you can make them greater. And you can certainly make them specific to you with just a small tweak or two.

Your Prompt Toolkit doesn’t need to be flashy; it just needs to be yours.

. . .

 **ALL-IN-ONE PROMPT Toolkit Cheat Sheet.**

Smart prompts for busy B2B sales professionals, ready when you need them. Stack them and adapt them to your specific circumstances.

 **TONE & Messaging**

“Write in a friendly, human tone — like a confident salesperson who’s good with people.”

“Match the tone of this message I wrote — this is how I usually speak.”

“Rewrite this to be clear, direct, and not too ‘salesy.’”

 **PROSPECTING & Research**

“Give me a short summary of [Company], a [sector] business based in [region]. Focus on what they do, who they sell to, and any recent news or challenges they face.”

“What are the main concerns of a [Job Title] at a [company type]?”

"What are the latest trends in [industry] that would matter to [job role]?"

First Contact Messages

"Write a short LinkedIn message to a [Job Title] who recently posted about [topic]. Suggest a quick intro call next week. Keep it professional and relaxed."

"Create a concise outreach email for a [role] in [sector] — no fluff, just relevance."

ROLE PLAY & Practice

"Act as a [role] at a [company type]. I'll present a solution — ask me a few natural questions or objections."

"Here's how I'd reply to that objection. Critique it from the buyer's point of view and suggest improvements."

"Give me 3 common objections a Procurement Manager might raise about [solution]. I'll try responding."

 **Follow-Ups & Deal Support**

“Write a friendly follow-up email for a customer who hasn’t responded to a proposal sent 10 days ago. Keep it respectful and helpful.”

“Help me reframe our proposal for a CFO — focus on risk, savings, and strategic value.”

“Create versions of this follow-up email tailored to a Procurement Lead, a Sustainability Manager, and a COO.”

 **Weekly or Monthly Prompts (“Silent Assistant”)**

“What’s happened this week in the [industry] sector that would matter to buyers or decision makers?”

“List any new or awarded tenders related to [topic] in [region] over the last 30 days.”

“Any leadership role changes in [sector] recently?”

“What’s new at [Competitor Name]?”

"Are there any upcoming compliance or regulatory shifts affecting [industry]?"

Document Summarisation & Review

"Summarise this tender document — highlight key deliverables, compliance terms, and evaluation criteria."

"Turn this technical report into a plain-language summary with commercial implications."

"What insights can I gather from this company's annual accounts that would affect their buying decisions?"

SELF-REFLECTION & Pipeline Review

"Based on this week's sales activity: [insert summary], what should I follow up on, reprioritise, or watch for?"

"Which deals in my pipeline look stuck — and what's the next logical move?"

 **Want some more? There is a free download of alternative prompts for each section of the book.**

Grab your free download at <https://rsrobertson.com/thesalespersonsguidepdf>

BONUS CHAPTER: COACHING YOURSELF FOR YOUR CAREER

Self-review, mindset, and long-term growth — one prompt at a time.

Salespeople don't always get the coaching they need. Not necessarily because managers don't care, but because time is tight, feedback loops are slow, and sometimes you're the only one in the room who actually knows what happened in the last call.

But AI can help you coach yourself. Not with a checklist or a script, but with perspective. It can help you spot patterns, sharpen your thinking, and push your self-review beyond "how did that feel?"

Smart questions, fresh angles, and honest reflection, whenever you're ready for it. A boost for you and your career over and above what company training will probably ever offer.

REVIEW YOUR Week Like a Pro.

You don't need a formal debrief to get insight. You just need 60 seconds, a quick summary, and a clear ask.

“Here’s a short summary of my week: [insert summary]. What’s missing from my follow-up? Any red flags or trends I should be aware of?”

You can even ask it to sort by:

- Deals moving
- Deals stuck
- Things you forgot to do

It won’t give you a magic solution, but it *will* hold up a mirror.

🗨️ **REMEMBER TO Ask AI to Be Honest.**

Want better coaching? Ask better questions. And give AI permission to be straight with you.

“This is what I said in a proposal follow-up email. Be brutally honest — would that get a reply? If not, suggest something stronger.”

OR:

“This is how I explained our value to a sceptical customer. Give me 2 things I did well, and 2 I could do better — and don’t hold back.”

You’re not looking for flattery. You’re looking to grow.

🗨️ **Revisit the ‘Could Have Been Better’ Moments.**

Not every call goes to plan. That’s where the learning lives.

“This call didn’t go well. The buyer was cold and I didn’t handle the price

objection well. What could I have done differently? Here's what I remember from the conversation..."

This kind of debrief isn't just about fixing that one deal, it sharpens you for the next.

And unlike a manager, AI doesn't need to protect your ego.

PRACTICE REFLECTIVE THINKING.

You can also ask AI to guide your own self-coaching sessions.

"Ask me 5 short questions to reflect on this past week in sales. Help me think about what worked, what didn't, and how I can improve next week."

Think of it like your own post-match interview.

The more consistently you reflect, the sharper you'll get — and the faster your instincts will develop.

USE It for Career Growth Too.

This isn't just about individual deals. You can ask AI to help you think bigger.

"How can I explain my commercial impact in a sales review — without sounding arrogant?"

"Help me prepare for a job interview for a Commercial Manager role. Here's my background..."

“Give me 3 ideas to improve how I’m perceived internally as a future leader.”

You’re building the future version of you, and AI can be a surprisingly good sounding board.

 **PROMPTING for CV and Career Positioning.**

Your CV, your profile, and even your interview responses are all sales tools — but most people never review them with fresh eyes.

AI can help, as long as you give it the right context.

“I’m applying for a Commercial Manager role at a company that values strategic thinking, customer leadership, and collaboration. Please review my CV and be brutally honest — does it sound too tactical or too safe? Help me position myself more like a future leader.”

THIS ISN’T about rewriting your CV for you. It’s about getting honest feedback fast — and spotting what you’re not seeing.

You can follow up with:

“Based on this job spec, what might I be missing in my profile?”

Or even:

“Which bullet points sound like filler? Where could I show more results?”

It's fast, free, and sharper than most quick LinkedIn reviews you'll ever get.

PROMPTING for Learning and Development.

If there's an area of selling you want to improve, such as closing, negotiating, or leading, don't just search aimlessly. Ask AI for **tailored** recommendations:

"I'm struggling with closing. I tend to avoid asking for commitment, especially when the buyer seems hesitant. Can you suggest books, podcasts, or specific exercises that would help me improve this skill? Give me pros and cons where possible."

You'll get resources, approaches, and even practice ideas. You can follow up by asking for summaries, comparisons, or suggestions on how to apply what you've learned.

THE CAREER Growth Accelerator Prompt.

Here's a high-impact prompt to use when you're thinking about your next move, especially if you're ready to grow into a leadership or commercial strategy role:

"What can I do to accelerate my career growth over the next 12 months? I'm confident in areas like customer relationships, prospecting, and presenting — but I want to improve in commercial strategy, managing others, and internal influence. What would you recommend I focus on, and how should I structure that learning?"

Use this regularly, and evolve it as your strengths and priorities shift.

This one prompt, used well, can shape the kind of progress most people wait years for.

 **BONUS CHEAT SHEET: Coaching Yourself with AI.**

Use these prompts when you want insight, reflection, or a career boost. They won't give you easy answers — but they'll help you ask better questions.

 **REVIEW YOUR WEEK**

"Here's a quick summary of my week. What am I missing, overlooking, or underestimating?"

 **HONEST FEEDBACK**

"This is what I said in a recent deal. Be brutally honest — how would a buyer read it?"

 **SELF-COACHING QUESTIONS**

"Ask me 5 reflection questions to help me improve how I sell."

 **POST-CALL ANALYSIS**

"The call didn't go how I hoped. Here's what happened. What could I have done differently?"

 **CAREER DEVELOPMENT**

"How can I position myself as a future Commercial Director?"

"What steps could I take this year to strengthen my leadership profile?"

 **CV FEEDBACK**

“Review my CV for a Commercial Manager role — tell me what sounds weak, what’s missing, and how to position myself more strategically.”

 **LEARNING PROMPT**

“I’m struggling with [insert skill]. Recommend books, exercises, or tools to help — and tell me why they work.”

 **THE GROWTH Prompt**

“Here’s what I’m good at. Here’s where I want to grow. What’s the smartest 12-month plan to accelerate my development?”

FINAL THOUGHT

Coaching isn’t just something you receive; it’s something you can create for yourself. With a bit of honest self-reflection, you will understand your bigger weaknesses, and you can open up to AI for help, and no one but you will ever know.

The more you treat yourself like someone worth investing in, the better your sales, decisions, and career will improve.

Just ask better questions, AI’s already listening.

AFTERWORD

Give it 10 Minutes and You'll be Hooked on the Benefits!

AI has now become a regular part of my work — and it's provided me with the greatest productivity boost since the advent of the PC and Google.

The speed and depth of the answers you can receive are extraordinary. This guide was created to assist you in unlocking that potential by asking better questions and setting more effective prompts.

I use AI to save time, identify opportunities, improve my writing, and think more clearly, not to replace myself, but to operate with greater clarity and pace.

It reduces the time needed for tasks like research, preparation, or summarising complex documents. And time, as you know, is the one thing we never get back. Every minute saved is an AI gift.

IF YOU TAKE anything from this book, let it be this:

You don't need to be perfect.

You don't need a particular background.

But if you stay curious, work hard, and keep improving, you'll be surprised where sales can take you.

Grab the Downloadable Prompt Toolkit

Get a clean, copy-and-paste-friendly PDF selection of more prompt suggestions for every section of this book:

 <https://rsrobertson.com/thesalespersonsguidepdf>

 **Like the book? Please leave a quick review on Amazon.**

It helps me continue writing the next one.

For more sales-focused insights, career support, and future releases in *The Salesperson's Guide To...* series, visit:

 <https://rsrobertson.com>

ABOUT THE AUTHOR

About the Author

Richard left school at 16, sold typewriters in the 1980s, and somehow ended up running companies across the UK, US, and Australia. He still isn't quite sure how, but it definitely wasn't by following a script.

Over the past 30+ years, he has sold into engineering, infrastructure, manufacturing, logistics, rail, and several industries that didn't exist when he started. He's worked in the field, at the board table, and everywhere in between.

Richard is the author of *The Sales Reset* series — a straight-talking, practical take on what it really takes to sell well and build a lasting career.

He now helps salespeople sharpen their thinking, grow their confidence, and make AI work for them, not the other way around.

This guide is part of a growing series: *The Salesperson's Guide To...*

Find more at: **rsrobertson.com**

