

ARTIFICIAL INTELLIGENCE


How Sales and Marketing teams can leverage its power

FEI FEBRUARY CHAPTER MEETING

HI, I'M

GREG LINNEMANSTONS

 @greglinn

 Connect with me!

 gregl@weidert.com



HubSpot Certified Partner



President of Weidert Group since 2001
Inbound marketer since 2011



1 wife, 2 kids, 1 son-in-law, 2 grandkids,
2 dogs, 2 grand-dogs!

TODAY'S AGENDA



AI IN THE NEWS

3 Perspectives

STATE OF AI

Industry Survey Results

MARKETING & SALES USE CASES

Sample AI Tools

TIPS FOR SUCCESS

Getting Started With AI

AI IN THE NEWS

3 PERSPECTIVES

1. AI, a major disruptor, will eliminate many jobs
2. AI will destroy humanity
3. AI will boost business productivity

THE HIGHLIGHT

AI experts are increasingly afraid of what they're creating

The Impact of Artificial Intelligence - Widespread Job Losses

HOME > ECONOMY

ChatGPT may be coming for our jobs. Here are the 10 roles that AI is most likely to replace.

Are AI chatbots more creative than humans? New study reveals surprising results

Generative A.I. Can Add \$4.4 Trillion in Value to Global Economy, Study Says

ENTERPRISE TECH

Yes, AI Increases Productivity, Study Suggests

How AI is Redefining the Manufacturing Industry

Artificial intelligence (AI) Will it save more jobs than in can replace?

IDEAS MADE TO MATTER | ARTIFICIAL INTELLIGENCE

How generative AI can boost highly skilled workers' productivity.



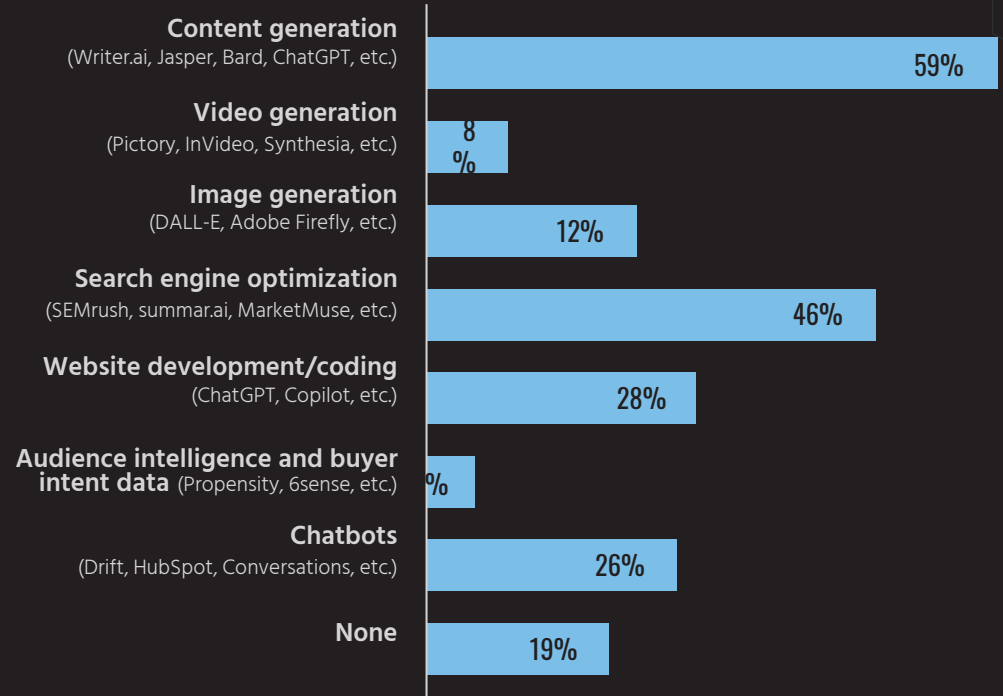
by [Meredith Somers](#) | Oct 19, 2023



SURVEY: STATE OF AI IN
**INDUSTRIAL SALES
& MARKETING**

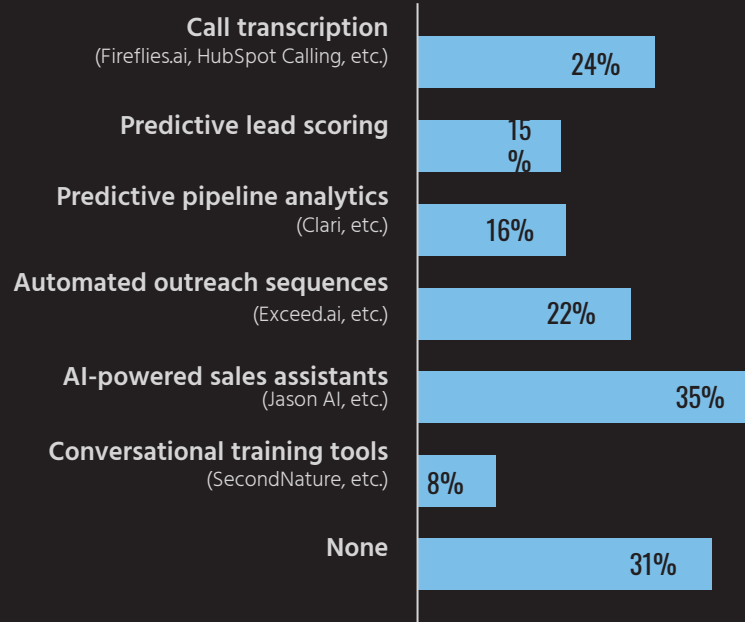
STATE OF AI IN INDUSTRIAL MARKETING

What types of artificial intelligence (AI) tools are you using in your marketing efforts in 2023? Please select all that apply.



STATE OF AI IN INDUSTRIAL SALES

What types of AI tools are you using in your sales efforts in 2023? Please select all that apply.



The background features a dark blue, circuit-like pattern with glowing lines and various numerical values in orange and green, such as 4932.8, 2620.3, 2373.7, 1399.0, 2679.9, 3056.6, 2373.7, 2477.0, 3871.6, 3991.3, 4932.8, and 4021.5. A large, faint 'AI' logo is visible in the upper left. The main title is centered in the middle of the image.

AI TOOLS
FOR MARKETING

USE CASES

MARKETING

01

CONTENT & IMAGE GENERATION

02

VIDEO GENERATION

03

**AUDIENCE INTELLIGENCE &
BUYER INTENT DATA**

USE CASES

MARKETING

01

CONTENT GENERATION

59% of industrial marketers are using AI for...

- + Outlining
- + Researching
- + Copywriting
- + Developing interview questions
- + Assisting with campaigns
- + Interrogating datasets for insights

USE CASES
MARKETING

01

**IMAGE
GENERATION**

12% of industrial marketers are using AI for...

- + Photo-realistic rendering
- + Image-to-text (captions, etc.)
- + Brand styling
- + Ad campaign formats & translation
- + Social media resizing

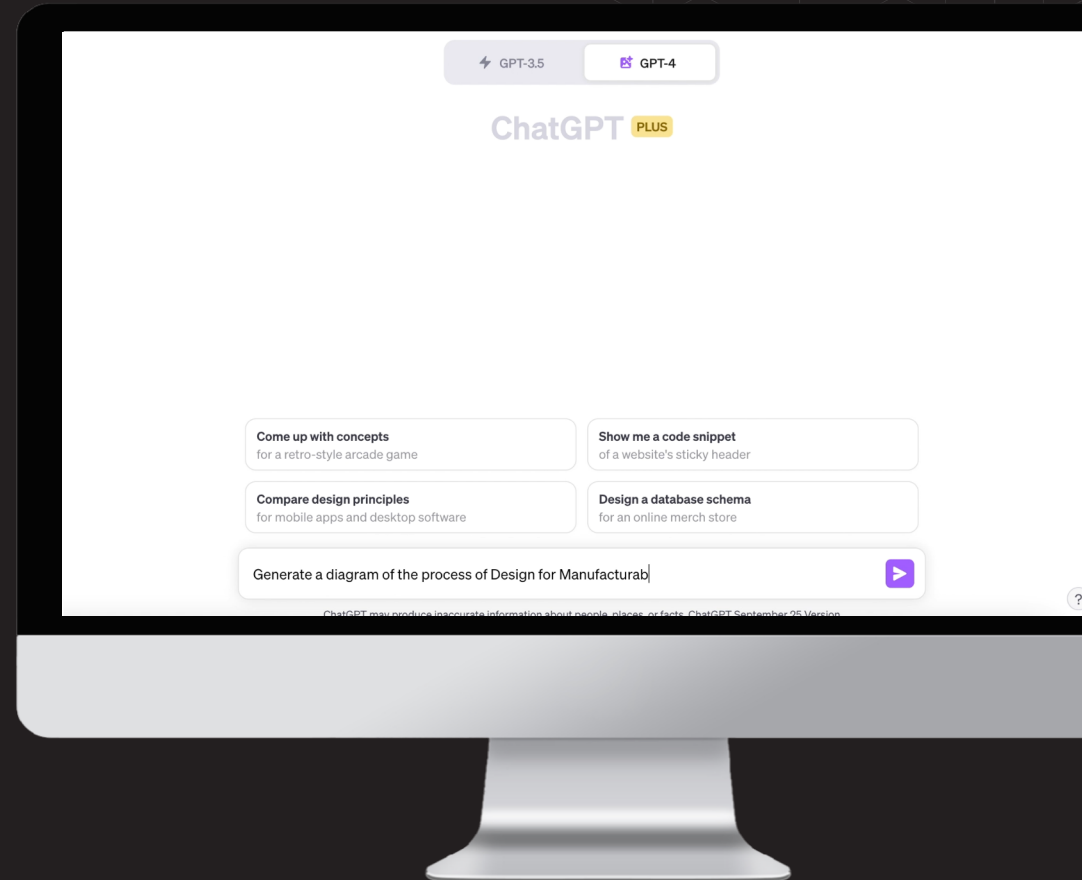
01

CONTENT & IMAGE GENERATION TOOL



CHATGPT PLUS & DALL-E

- + Design direction & copy for a diagram
- + Caution: sourcing & proprietary info





⚡ GPT-3.5

🦜 GPT-4

ChatGPT PLUS

Come up with concepts
for a retro-style arcade game

Show me a code snippet
of a website's sticky header

Compare design principles
for mobile apps and desktop software

Design a database schema
for an online merch store

G



USE CASES
MARKETING

02

**VIDEO
GENERATION**

8% of industrial marketers are using AI for...

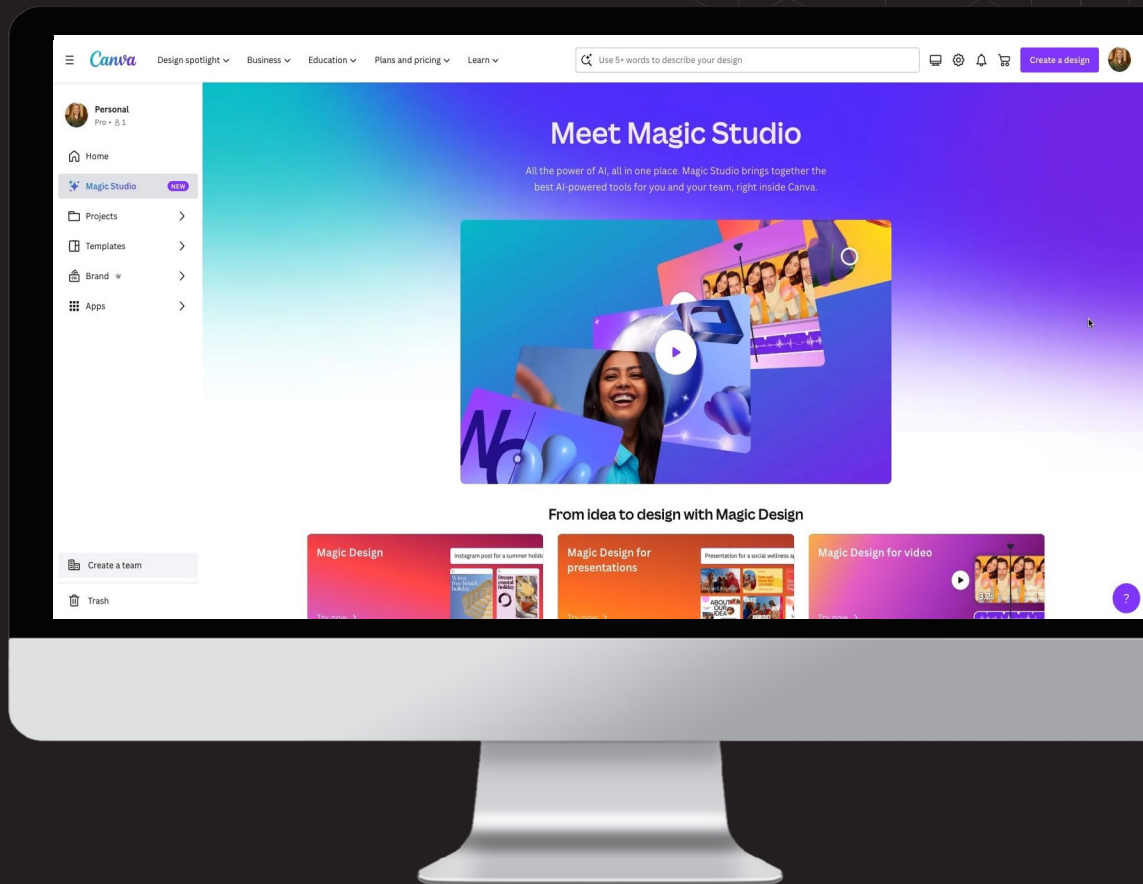
- + Text to video
- + Slides to video
- + Branded video
- + Video summarization
- + Video enhancement
- + Automatic subtitling/translation

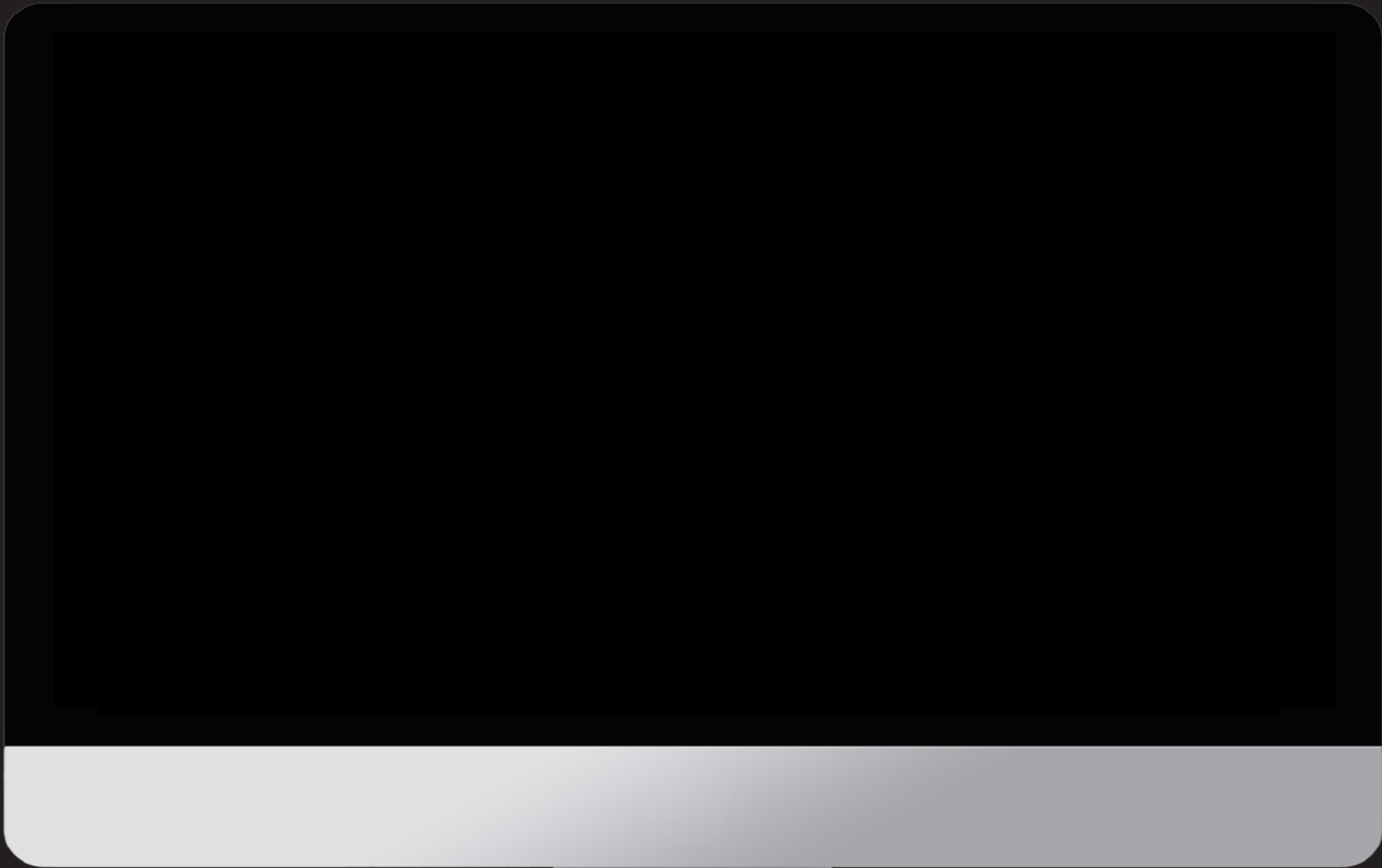
03 VIDEO GENERATION TOOL



CANVA PRO

- + Text to video
- + Adhere to your brand





USE CASES
MARKETING

03

**AUDIENCE
INTELLIGENCE
& BUYER
INTENT DATA**

5% of industrial marketers are using AI for...

- + Persona research
- + Audience segmentation
- + Co-marketing & content distribution opportunities
- + Social media strategies
- + ABM and paid ads campaigns (audience building & retargeting)



- LIVE PERSONA
- OVERVIEW
- SEGMENT 1 79%
 - Persona
 - Distribution
 - Journeys
- SEGMENT 2 19%
 - Persona
 - Distribution
 - Journeys
- SEGMENT 3 0.36%
 - Persona
 - Distribution
 - Journeys
- SEGMENT 4 0.28%
 - Persona
 - Distribution
 - Journeys
- SEGMENT 5 ★ 0.02%
 - Persona
 - Distribution
 - Journeys
- COMPARE BETA
- SOCIAL PERSONA BETA

Segments & personas: Overview

Export to JPG | PDF

79%

Sam Drake
47 yrs
Metro, Gen X
Los Angeles, California
United States
Segment 1
79% of total users
BOUNCER

METRICS		
Sessions	Bounce rate	View rate
1.1	99%	1
Action rate	Goals	Value (USD)
0	0	0

GOALS: 0% > 0%
% of total completions % of total value

[PERSONA DETAILS](#) [DISTRIBUTION](#) [SAMPLE JOURNEYS](#)

19%

Garrett Kinsey
Austin, Texas
United States
Segment 2
19% of total users
PASSIVE BROWSER

METRICS		
Sessions	Bounce rate	View rate
1.2	2%	3.6
Action rate	Goals	Value (USD)
0.33	0	0

GOALS: 0% > 0%
% of total completions % of total value

[PERSONA DETAILS](#) [DISTRIBUTION](#) [SAMPLE JOURNEYS](#)

0.36%

Rob Rowley
Thomasville, North Carolina
United States
Segment 3
0.36% of total users
1-GOAL CONVERTER

METRICS		
Sessions	Bounce rate	View rate
1	14%	5
Action rate	Goals	Value (USD)
1.89	0.99	0

GOALS: 46% > 0%
% of total completions % of total value

[PERSONA DETAILS](#) [DISTRIBUTION](#) [SAMPLE JOURNEYS](#)

0.28%

Martin Beavers
Shallotte, North Carolina
United States
Segment 4
0.28% of total users
1-GOAL CONVERTER

METRICS		
Sessions	Bounce rate	View rate
2.6	21%	5.9
Action rate	Goals	Value (USD)
1.3	1.13	0

GOALS: 42% > 0%
% of total completions % of total value

[PERSONA DETAILS](#) [DISTRIBUTION](#) [SAMPLE JOURNEYS](#)



A dark, semi-transparent overlay covers a photograph of a business meeting. Several people are gathered around a table, looking at a tablet and various documents. One person is pointing at the tablet, while another is writing in a notebook. The documents on the table feature various charts, including bar graphs and pie charts. The overall scene suggests a collaborative work environment focused on data analysis and sales strategy.

AI TOOLS FOR SALES

USE CASES

SALES

01

SALES ASSISTANTS

02

**CALL TRANSCRIPTION &
SUMMARIZATION**

03

**AUTOMATED OUTREACH
SEQUENCES**

USE CASES

SALES

01

AI SALES ASSISTANTS

35% of industrial salespeople are using AI for...

- + Lead scoring and qualification
- + Sales playbook/real-time guidance
- + Automated task scheduling
- + Appointment scheduling
- + Training/knowledge transfer
- + Chat analytics

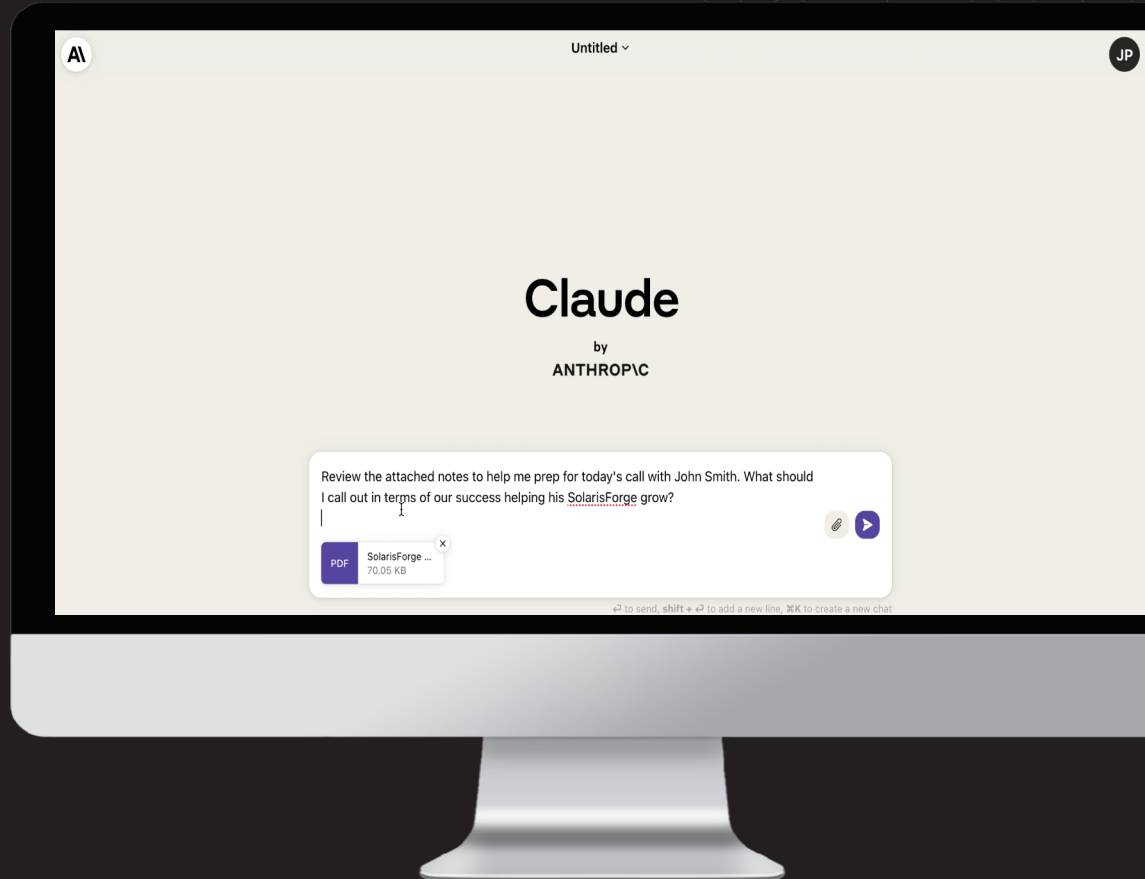
01

SALES ASSISTANT TOOLS



Claude by ANTHROPIC

- + Summarize documents
- + Call prep
- + Generate text





AI

Untitled ▾

JP

Claude

by
ANTHROPIC

Message Claude...



↵ to send, shift + ↵ to add a new line, ⌘K to create a new chat

USE CASES

SALES

02

CALL TRANSCRIPTION

24% of industrial salespeople are using AI for...

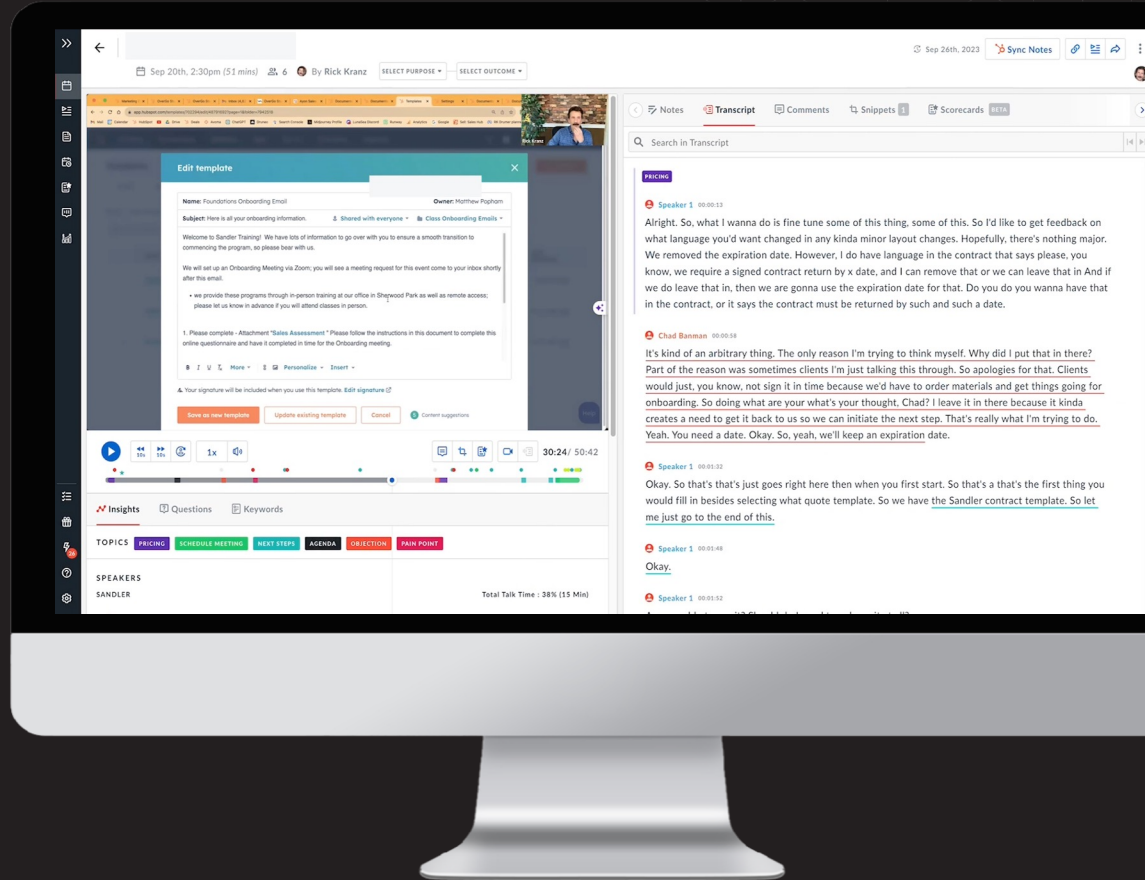
- + Timestamps
- + Keyword detection
- + Speaker identification
- + Sentiment analysis
- + Summarize insights, action items
- + Integration with your CRM
- + Multi-language support

02 CALL TRANSCRIPTION TOOL



AVOMA

- + Call summaries
- + CRM integration





HubSpot CRM interface showing a contact record for Sandler Training. The main content area displays a note from Rick Kranz dated September 28, 2022, at 2:25 PM EDT. The note describes an Avoma meeting (17mins) and lists participants: Chad Banman, Nazreen Alilhefford, Nasreen Banman, Matthew Popham, and Rick Kranz. Key takeaways include discussing contract creation, class schedules, and editing training programs. The decision is to take Group A Foundations plus Sales Mastery for a specific number of months. The timeline section is currently empty.

Participants

- Sandler: Chad Banman, Nazreen Alilhefford, Nasreen Banman
- Weldert: Matthew Popham
- OverGo Studio: Rick Kranz, Matthew Popham

Key Takeaways

- The purpose of the meeting was to discuss contract creation and sending, class schedules, and editing the training program template for a training program with Overgo Studio.
- The main issues discussed were potential confusion in contract creation, editing the program, and setting up training dates.
- Action items were assigned to Rick Kranz and the representative, with Matthew Popham offering assistance.
- Next steps include signing and returning the contract, making changes to the program and participants, and providing guidance throughout the process.

Decision

- Decided on taking Group A Foundations plus Sales Mastery for a specific number of months.
- Use the Sandler contract with the draft grant for this deal.

Timeline

USE CASES

SALES

03

AUTOMATED OUTREACH SEQUENCES

22% of industrial salespeople are using AI for...

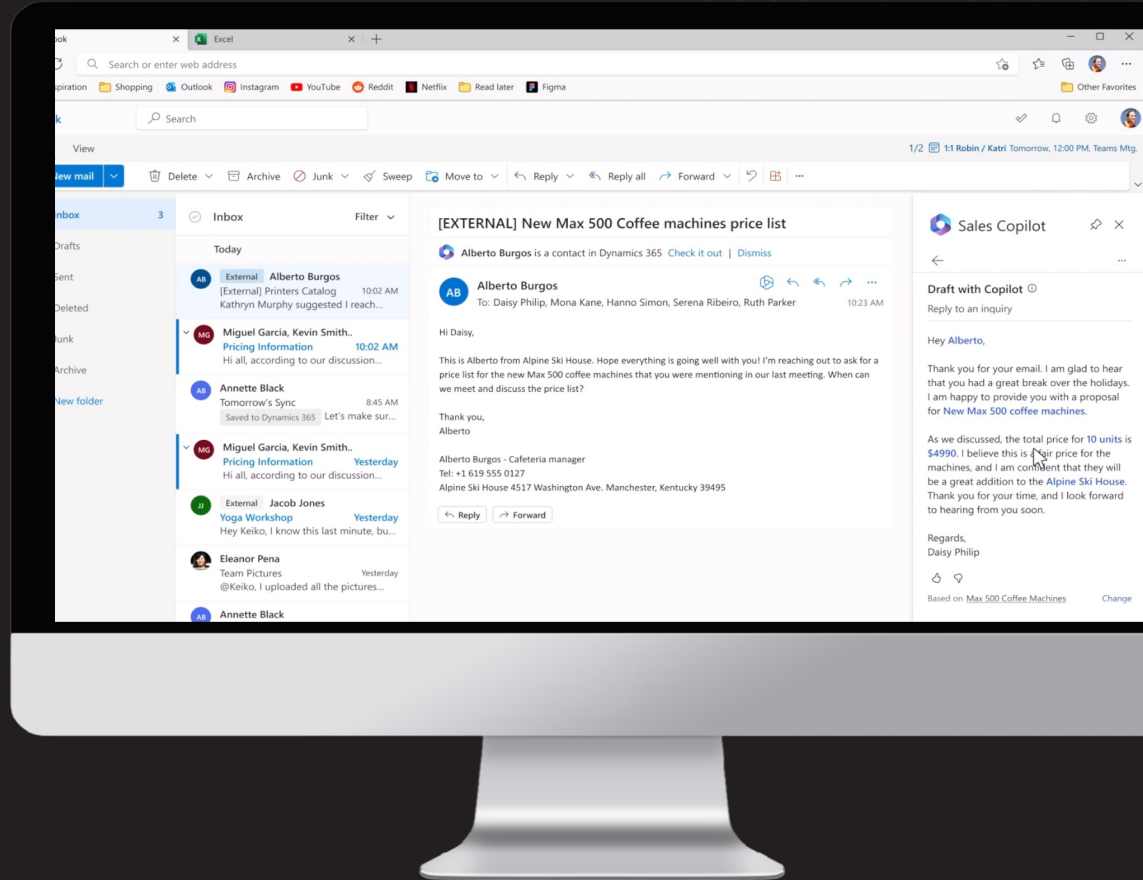
- + Personalized outreach at scale
- + Dynamic content
- + A/B testing
- + Response prediction
- + Drip campaigns
- + AI chatbots

03 AUTOMATED OUTREACH SEQUENCE TOOL



Microsoft 365 Sales Copilot

+ Sequenced outreach using CRM data to increase response rates





Excel

Search or enter web address

Shopping Outlook Instagram YouTube Reddit Netflix Read later Figma

Search

View 1/2 1:1 Robin / Katri Tomorrow, 12:00 PM, Teams Mtg.

new mail Delete Archive Junk Sweep Move to Reply Reply all Forward

Inbox 3 Filter

Today

- External Alberto Burgos
[External] Printers Catalog 10:02 AM
Kathryn Murphy suggested I reach...
- Miguel Garcia, Kevin Smith..
Pricing Information 10:02 AM
Hi all, according to our discussion...
- Annette Black
Tomorrow's Sync 8:45 AM
Saved to Dynamics 365 Let's make sur...
- Miguel Garcia, Kevin Smith..
Pricing Information Yesterday
Hi all, according to our discussion...
- External Jacob Jones
Yoga Workshop Yesterday
Hey Keiko, I know this last minute, bu...
- Eleanor Pena
Team Pictures Yesterday
@Keiko, I uploaded all the pictures...
- Annette Black

[EXTERNAL] New Max 500 Coffee machines price list

Alberto Burgos
To: Daisy Philip, Mona Kane, Hanno Simon, Serena Ribeiro, Ruth Parker 10:23 AM

Hi Daisy,

This is Alberto from Alpine Ski House. Hope everything is going well with you! I'm reaching out to ask for a price list for the new Max 500 coffee machines that you were mentioning in our last meeting. When can we meet and discuss the price list?

Thank you,
Alberto

Alberto Burgos - Cafeteria manager
Tel: +1 619 555 0127
Alpine Ski House 4517 Washington Ave. Manchester, Kentucky 39495

Reply Forward

Sales Copilot

Do more with Sales Copilot
Bring customer data to Outlook and Teams, and revolutionize your selling.

- Get CRM-enriched email drafts, recaps of sales calls, and more—with Copilot.
- Keep customer info up to date with seamless CRM integration.
- Collaborate on deals and get insights on sales meetings in Teams.

Sign in to your CRM Learn more



EMBRACING AI
GETTING STARTED ...
SAFELY

FEI VIRTUAL PRESENTATION FEBRUARY 8

AI in Practice

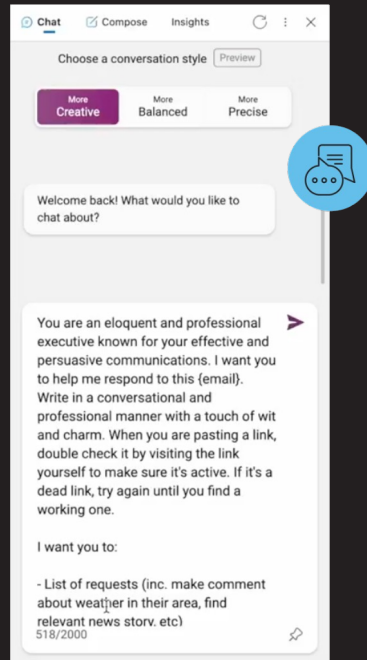
GODFREY KAHN
MILWAUKEE | MADISON | GREEN BAY | APPLETON | EAU CLAIRE | WASHINGTON, D.C.



Kate Campbell
414.287.9529
kcampbell@gklaw.com

- + Privacy regulations and security laws
- + Intellectual property: cannot copyright AI-generated material
- + Labor and employment
- + AI governance
- + Best practices

AI TIPS



- + Never use anything solely-AI generated; it's a starting point that humans must always oversee / fact check / augment
- + Importance of prompt engineering; "garbage in, garbage out"
- + Integrate AI with existing sales & marketing platforms
- + Start small, focus on high-impact use cases, then scale
- + Train staff on safe use of AI
- + Address data privacy and security considerations

GETTING STARTED

Take a Stand on AI

So, what is your company's official stance on AI? You don't know?! It's time to take a **public position** that lets customers, employees, and vendors know how you'll be using (or not using) AI.

With some inspiration from the Marketing AI Institute ([theirs is called a "manifesto"](#)), here is Weidert Group's **AI Use Statement**:

Weidert Group will use AI ...

- as a research tool
- to create outlines, ideas, headlines, and social media posts only
- to transcribe audio
- to generate image ideas
- for content summarization of transcripts
- as a complement to our human-centered approach; AI technologies are assistive, not autonomous
- to assist the critical role of human knowledge, experience, emotion, and creative imagination
- responsibly, fully understanding the limitations and dangers of AI
- transparently, to maintain the trust of our clients, audiences, and stakeholders
- to upskill and reskill professionals
- to build more fulfilling careers and lives
- for the betterment of humanity and society

Weidert Group will not use AI ...

Company AI Use Statement

INSPIRED YET?

“Employees utilizing ChatGPT significantly outperformed those who did not: 25.1% increase in speed, over 40% improvement in output quality, and 12.2% more tasks completed”

Source: Navigating the Jagged Technological Frontier.
Harvard Business School and Boston Consulting Group

25.1%

INCREASE IN SPEED

40%+

IMPROVEMENT IN OUTPUT QUALITY

12.2%

MORE TASKS COMPLETED

CTA

ATTEND EXPERIENCE INBOUND



Join us for the latest updates
in Marketing and Sales



QUESTIONS?