

The Sales AI Playbook

Where It Helps. Where It Hurts. And How To Tell the Difference.

Eighty-seven percent of sales organisations now use AI. Seventy-four percent of companies cannot scale value from the AI investments they have already made. That gap is not a technology problem. It is a leadership problem.

This playbook is the practical companion to Episode 12. Use it to map where AI earns its place in your sales operation, audit your current outputs against a single test for trust, write your team’s rules of engagement, plan a disciplined ninety-day adoption, and measure the only metrics that actually tell you whether AI is paying its way.

Designed for sales leaders, business owners, and managers responsible for sales teams — from sole traders through to multi-national functions.

TOOL 1

The AI Deployment Map

Where AI earns its place — and where it does not.

Before you deploy AI anywhere in your sales operation, place each candidate activity on this map. The Green Zones are where AI gives you back time, capacity, and consistency. The Red Zones are where AI quietly damages trust and conversion. Be honest about which side of the line each of your current uses sits on.

<p>GREEN ZONE</p> <p>Research & Pre-Call Prep</p> <p>Public-domain research on the company, the contact, recent news, funding, structure.</p> <p>Discipline: The output is a briefing, not a script. The human still has to think.</p>	<p>RED ZONE</p> <p>Discovery</p> <p>Asking the real questions, hearing the half-second pause, reading what is not being said.</p> <p>Discipline: AI can ask. It cannot hear what matters. Keep humans in this room.</p>
<p>GREEN ZONE</p> <p>Admin & CRM Hygiene</p> <p>Auto-transcription, CRM updates, next-action logging, internal reporting.</p> <p>Discipline: Garbage in, garbage out. Clean the data before you switch the AI on.</p>	<p>RED ZONE</p> <p>Negotiation</p> <p>Real-time read. Knowing when to hold, when to give, when to walk away.</p> <p>Discipline: Skin in the game is non-negotiable. Humans only.</p>

GREEN ZONE

Summarisation & Recall

Call summaries, account history, deal timeline reconstructions, meeting recaps.

Discipline: The summary is a starting point. The judgment is still yours.

RED ZONE

Closing

Asking for the business with courage and accepting a difficult answer.

Discipline: The buyer must feel a human asking. Not a workflow nudging them.

GREEN ZONE

Draft, Then Edit

First drafts of emails, proposals, follow-ups — produced fast and edited by a human.

Discipline: The edit is non-negotiable. Send the first draft and you fail the trust test.

RED ZONE

Difficult Conversations

Service failures, escalations, complaints, recovery after a project goes sideways.

Discipline: Customers need to know a human heard them. Owned it. Will fix it.

GREEN ZONE

Pipeline Pattern Recognition

Stall detection, forecast variance, rep activity correlation, win-loss patterns.

Discipline: Pattern recognition only pays if leadership acts on what it shows.

RED ZONE

The Trust Layer

The unprompted check-in, the honest answer, the memory of a small detail.

Discipline: Buyers can tell. Once they can tell, the relationship has a ceiling.

TOOL 2

The Could-A-Buyer-Tell Audit

A one-page test for every customer-facing output.

Pick the last ten customer-facing outputs your team produced this week — emails, proposals, follow-ups, LinkedIn messages, recap notes. Run each one against this checklist. If you cannot answer YES to all six, that output should not have been sent.

- Does it reference a specific detail from the actual conversation that an AI could not have known?
- Does it sound like the person sending it — their voice, their phrasing, their cadence?
- Has it been read and edited by a human before sending — not just scanned?
- Is it free of generic AI tells — em-dashes everywhere, lists of three, 'I hope this finds you well', 'let's circle back'?
- Does it advance the relationship by a specific, named step — not just 'follow up'?
- If the buyer forwarded this to a colleague, would the colleague say 'that's a human who knows their stuff' — or 'that's AI'?

Apply this test for thirty days. The team that passes it consistently is the team whose conversion rate will quietly start to climb while the competition's quietly falls.

TOOL 3

Your AI Rules of Engagement

Write them down. Share them. Refer to them in one-to-ones.

Most teams have no agreed standard for where AI can and cannot be used. The result is improvisation at scale — which is inconsistency at scale. Use this template to define your team's rules. Be specific. Be written. Be public.

Activity	Our agreed rule (write yours)
Prospect research	AI may compile a pre-call briefing. Rep reads, edits, and forms a hypothesis before the call.
Outbound emails	AI may draft. Rep must personalise with a specific detail or insight before sending.
CRM updates	AI auto-completes where possible. Rep reviews weekly for data accuracy.
Call summaries	AI generates. Rep reviews and adds judgment notes within twenty-four hours.
Proposals	AI may draft sections. Rep customises pricing, scope, and language. Senior review on deals above £...
Discovery calls	Human-led. No AI participation. Recording for summary only.
Negotiation	Human-led. AI may model scenarios offline. No AI in the conversation.
Closing conversations	Human-led. No AI scripting.
Complaints & escalations	Human-led from the first contact. AI may assist with internal context, never with the customer.
LinkedIn / social	AI may draft posts. Rep must edit so it sounds like them. No automated outreach.
Quote turnaround	AI may calculate. Rep signs the email and stands behind the figure.

The rules above are a starting point — not the final word. Adapt the language to your business, your sector and your size. The point is that the rules exist, are written down, and are enforced.

TOOL 4

The 30 / 60 / 90 Adoption Plan

A disciplined ninety days from current state to scaled value.

Most AI deployments fail because they skip the foundations. Data is dirty. Rules are unwritten. The team is untrained. This plan sequences the work properly. Run it in order. Do not skip phases.

DAYS 0 – 30 Foundations

- Audit every AI tool you currently pay for. List the problem each one is solving. Cancel anything without a clear answer.
- Audit your data. CRM hygiene, contact records, deal stages, custom fields. Fix what is broken before the AI gets switched on.
- Define your Green Zones and Red Zones in writing (use Tool 1). Get leadership sign-off.
- Pick a single Green Zone to start with — usually CRM hygiene or call summarisation. Resist the urge to deploy everything at once.

DAYS 31 – 60 Skill

- Train the team properly on the one tool you have chosen. Not a vendor demo — real practice with real examples.
- Run weekly working sessions where reps compare AI outputs and edit them collaboratively to a brand voice standard.
- Apply the Could-A-Buyer-Tell test to every customer-facing output (use Tool 2). Track pass rate weekly.
- Document your rules of engagement (Tool 3). Share. Reference in one-to-ones. Enforce.

DAYS 61 – 90 Scale

- Measure baseline against the KPIs in Tool 5. Be honest about whether value is real or claimed.
- Add a second Green Zone deployment — only once the first is working and measured.
- Run a Red Zone audit: where has AI quietly slipped into customer-facing work that should be human-only?
- Review and tighten the rules of engagement. Update based on what the data is telling you.
- Brief the board / leadership on what is working, what was cut, and what the next quarter looks like.

TOOL 5

The AI Metrics That Actually Matter

Forget adoption rates. Measure these.

Most businesses measure AI by how many people are using it. That is the wrong number. Adoption tells you the tool got switched on. It tells you nothing about whether the tool is paying its way. These are the five KPIs that do.

Metric	What it tells you	Target direction
Selling time per rep, per week	Hours actually in front of, or on the phone with, customers. The whole point of AI is to grow this.	Up. Significantly.
Could-A-Buyer-Tell pass rate	Percentage of customer-facing outputs that pass the Tool 2 audit on review.	Above 90%.
Response rate on outbound	If AI is helping, prospects engage more. If AI is hurting, response rates quietly halve over 90 days.	Up. Watch for the dip.
Forecast accuracy	Pipeline pattern recognition should improve the gap between forecast and actual. If it doesn't, the AI isn't earning its place.	Variance shrinking.
Cost per closed deal	Add up your AI spend. Divide by deals closed. Compare quarter on quarter. This is the only number that ends the conversation.	Down.

The honest test: if all five of these metrics are moving in the right direction, your AI deployment is paying its way. If three or more are flat or negative, you are in the seventy-four percent. Cut, reset, and start again with the foundations.

HOW TO USE THIS PLAYBOOK

Three ways in.

If you are a sole trader or micro business

Start with Tool 1 and Tool 2. Get crystal clear on what you should and should not be handing to AI. Apply the Could-A-Buyer-Tell test for the next thirty days to everything you send. That single discipline will protect your most valuable asset — the trust your customers have in your name.

If you lead a small or mid-sized sales team

Run Tools 1, 3 and 4 in sequence. Define your zones, write your rules of engagement, and work the ninety-day plan. Do not deploy more tools until the foundations are in. The teams that win with AI are the ones whose leaders did the unglamorous work first.

If you are a sales director or board-level leader

Use Tool 5 to challenge the AI conversation in your business. Adoption is not value. Demand the five metrics. Hold the team to them. And use Tool 3 to make sure your standards are explicit, written, and shared — not improvised.

If you would like to talk to a Sales Geek about deploying AI properly in your business — to do the audit, write the rules, and work the plan — get in touch. We do this work across the world, every day, with businesses of every size. Adoption is the easy part. Value is the work.

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