

Module 3: Sales & Customer Operations

AI Business Automation Mastery

Lesson 3.1: AI Chatbots for Customer Support

Modern AI chatbots handle 80% of customer questions without human intervention. This frees your team to focus on complex, high-value interactions.

What Chatbots Handle Well:

- Order status, tracking, delivery questions
- Product information, specifications, availability
- Basic troubleshooting with guided steps
- Account questions (password reset, plan changes)

- FAQs answered consistently and instantly
- Appointment scheduling and confirmations
- Returns and exchanges initiated

When to Route to Humans:

- Complaints requiring empathy and resolution authority
- Complex technical issues beyond common scenarios
- Custom requests or special accommodations
- High-value customer segments (VIPs, enterprise)
- Sensitive situations (billing disputes, cancellations)
- Anything requiring human judgment or creativity

Implementation Best Practices:

Build a comprehensive knowledge base:

Feed your chatbot all product documentation, policies, FAQs, past support tickets. The better your knowledge base, the better your chatbot performs.

Design personality and tone:

Match your brand. Friendly/professional for consumer brands. Formal/technical for B2B. Add humor if it fits your voice.

Set clear handoff triggers:

Define specific conditions: keywords indicating frustration, request for human, complex multi-part questions, after N failed attempts to resolve.

Measure and iterate:

Track resolution rate, customer satisfaction, common failure points. AI improves with feedback and additional training data.

Multi-Channel Coverage:

Deploy chatbots across website, Facebook Messenger, WhatsApp, Instagram DMs, and email. One system learns from all channels, improving everywhere.

Lesson 3.2: Lead Scoring and Qualification

Sales teams waste 80% of time on leads that won't convert. AI lead scoring ensures focus on prospects most likely to buy.

Scoring Dimensions:

Demographic fit (25% of score):

Company size, industry, role/authority, location, budget indicators. Match against your best customers' profiles.

Behavioral signals (40% of score):

Website pages visited, content downloaded, emails opened, webinar attendance, pricing page views, demo requests.

Engagement level (20% of score):

Frequency of interaction, recency, multi-channel engagement, response to outreach.

Negative signals (-15% deduction):

Unsubscribes, job changes, competitor research, long periods of inactivity, bounced emails.

AI-Powered Lead Scoring Model:

Train AI on your historical closed-won and closed-lost deals. What patterns predict conversion? Firmographics, behaviors, sources, timing. The model updates automatically as new data comes in.

Output: Prioritized list daily

Hot leads (score 80-100) → Immediate sales outreach

Warm leads (score 50-79) → Nurture sequence

Cold leads (score 20-49) → Long-term drip

Disqualified (under 20) → Remove from active follow-up

Implementation Steps:

1. Identify your best customers (closed-won last 12 months)

2. Identify worst-fit customers (closed-lost or churned)

3. List all data points you have on both

4. Build scoring model with AI

5. Test on new leads for 60 days

6. Refine based on actual conversion data

Lesson 3.3: Personalized Sales Sequences

Generic outreach gets ignored. AI-personalized emails receive 3-5x higher response rates.

Personalization Levels:

Level 1 - Basic: First name, company name, industry. Doubles response rates vs. generic.

Level 2 - Contextual: References recent company news, mutual connections, industry trends they care about. Triples response rates.

Level 3 - Individualized: Specific observations about prospect's behavior, role-specific pain points, competitor comparisons. 5x response rates.

AI Personalization Process:

Step 1: Research

AI scrapes LinkedIn, company website, news, social media, industry reports for prospect-specific information.

Step 2: Insight extraction

What matters to this person? What problems do they likely face? What recent events create opportunities?

Step 3: Message generation

AI drafts email incorporating research, matching tone, addressing likely objections, proposing specific value.

Step 4: Review and send

Sales rep reviews (2-3 minutes), adjusts if needed, sends. Personal touches added where appropriate.

Multi-Step Sequences:

Day 1: Initial outreach with strong hook

Day 3: Different angle, additional value

Day 7: Case study or social proof

Day 14: Soft breakup email ("Should I close your file?")

Day 30: Re-engagement with new offer/content

AI adapts sequence based on engagement. Clicked but didn't reply? Different follow-up. Ignored? Switch angle completely.

Lesson 3.4: CRM Automation Workflows

Your CRM should run itself for routine tasks. Sales reps spend only 30% of time selling — automation can get this to 70%.

Automatic Data Capture:

- Email opens, clicks, replies tracked and logged

- Website visits recorded with page duration
- Calls logged and transcribed
- Meeting notes auto-generated from calendar events
- Social media interactions captured
- Form submissions instantly created as leads

Workflow Automation Examples:

Lead assignment: New lead comes in → AI scores it → Routes to appropriate rep based on territory, expertise, workload → Auto-sends welcome email → Creates follow-up task

Deal progression: Opportunity moves stages → AI updates probabilities → Triggers appropriate emails → Notifies manager at thresholds → Updates forecast

Customer success: Usage drops below threshold → AI flags as risk → Triggers outreach → Schedules check-in → Tracks resolution

Renewal management: 90 days before renewal → AI predicts renewal likelihood → Initiates appropriate sequence → Alerts CSM if at-risk

Performance Dashboards:

AI generates real-time dashboards showing pipeline health, conversion rates, sales velocity, rep performance, forecast accuracy. Identify issues before they become problems.

Weekly: Automated reports delivered every Monday showing last week's performance, this week's priorities, and insights worth attention.