BOOTCAMP INSIGHTS

Key takeaways from the workshop:

From knowledge to action

AI workshop outcomes & expert insights

HOW CAN I IMPROVE MY LEAD FUNNEL TO AUTOMATE MY INTERACTIONS AND MY CRM?

This summary reviews what was produced by the participants during the workshop, complemented by the analyses and recommendations of our AI experts.

THE WORKING GROUP'S PERSPECTIVE

Target users

- Customers with Internet access
- Internal sales team composed of three people

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General principle

The **AI agent automatically adapts its messages and recommendations** based on the customer profile.

The objective is to provide **each stakeholder with relevant, understandable, and actionable information**, aligned with their specific challenges.

Customer segments

Not all customers have the same expectations. The **AI agent tailors its messaging** according to the customer type:

- **Industrial customers**: receive **detailed technical information**, focused on **return on investment** and **solution reliability**.
- **Commercial customers**: messages emphasize **profitability**, **total cost of ownership**, and **service levels**.
- **Public sector organizations**: the agent prioritizes **sustainability**, **regulatory compliance**, and **traceability requirements**.

Personalization factors

To personalize interactions, the solution relies on multiple data sources:

CRM data, **history of past interactions**, and **contextual signals** such as the communication channel, recency of exchanges, and customer intent.

This enables **fine-grained message adaptation** and **maximizes impact at every touchpoint**.

Segmentation and playbooks

Each customer segment is associated with **playbooks**, i.e. **predefined communication strategies**.

These playbooks guide the AI agent on **what messages to deliver and which actions to recommend**:

- **Industrial**: technical ROI and operational reliability
- **Commercial**: cost optimization and service performance
- **Public sector**: regulatory compliance, sustainable development goals, and traceability requirements

Omnichannel continuity

The **AI agent ensures a seamless and consistent experience** across all communication channels (**email, chat, web, WhatsApp**).

It preserves **conversation context**, **discussion status**, and **next best actions**, enabling continuity regardless of the channel used.

Objective

- Automate repetitive tasks throughout the sales process
- Enable teams to focus on negotiation and deal closing
- Increase sales performance through better allocation of time and resources

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Main challenge

When deploying an AI-based solution, it is **essential to define clear, concrete, and measurable objectives from the outset**.

Without precise objectives, the solution risks **spreading too thin**, multiplying use cases without prioritization, and **failing to demonstrate real value** for teams and the business.

SMART objectives

So-called **SMART objectives** provide a framework to effectively steer implementation. They help define a clear direction, measure results, and adjust the solution over time.

Examples of guiding objectives include:

- **Reduce response time to prospects to under 5 minutes** for all qualified leads within 6 months, to improve responsiveness and early engagement.
- **Shorten the sales cycle by 20%** on targeted segments by automating repetitive tasks and improving lead prioritization.
- **Increase conversion rates by 10%** for priority prospects over the next quarter through predictive lead scoring and more personalized interactions.

This approach **directly links AI usage to measurable and understandable outcomes** for all stakeholders.

Benefits

- Increased sales performance
- Improved lead qualification
- Better understanding of the market and customer behaviors

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Sales performance

Automation and personalization significantly improve **commercial efficiency**.

Faster response times strengthen **prospect engagement and satisfaction**, while **shorter sales cycles and proposal timelines** directly accelerate revenue generation.

Improved lead prioritization, combined with more personalized follow-up, also contributes to **higher conversion rates**.

Team efficiency

By automating **repetitive and time-consuming tasks**, sales teams can refocus on **high-value activities** such as customer relationships, negotiation, and closing deals.

This optimization also **reduces customer acquisition costs** through more targeted and efficient use of sales resources.

Steering and governance

Improved **data quality and completeness in the CRM** enhances the reliability of analyses and management decisions.

More accurate sales forecasts facilitate **pipeline management**, while **explainable AI recommendations** and clear audit mechanisms strengthen **transparency and trust**.

Scalability

The implemented processes are designed to be **scalable**.

They can adapt to **organizational growth**, increased lead volumes, or offer diversification without degrading performance or adding operational complexity.

Pain points

- Acceptance of the solution by the sales team
- Change management and training needs to ensure effective adoption and usage of the AI agent

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Data quality and structuring

AI performance depends directly on **data quality**.

Incomplete CRM data, duplicate leads, inconsistent segmentation, or poorly defined lifecycle stages significantly reduce the effectiveness of AI-driven scoring and automation.

Technology ecosystem

A **fragmented technology environment** limits automation value.

Poor integration between CRM, marketing automation, and CPQ tools makes it difficult to orchestrate the full prospect journey and maintain a reliable end-to-end sales funnel view.

Operational scalability

Manual processes quickly reach their limits as activity grows.

Non-automated follow-ups and content production do not scale well across multiple regions, languages, and channels.

Team trust and acceptance

AI adoption largely depends on **business team trust**.

Opaque scoring models can generate skepticism, highlighting the need for **explainable, understandable recommendations**, supported by clear rules and safeguards.

Knowledge preparation

Before deploying **RAG-based architectures**, existing knowledge bases must be structured and assessed.

Implementing a **Docuscore** enables document audits based on readability, relevance, metadata quality, and confidentiality level, ensuring **reliable and usable responses**.

Human support

Successful deployment relies not only on technology but also on **people**.

Hands-on workshops are essential to demonstrate how AI complements sales teams' work, highlight **quick wins** (time savings, better targeting), and clarify escalation and exception-handling processes.

Model learning

Continuous improvement of AI performance requires a **high-quality learning base**.

Properly labeled and annotated historical interactions enrich models over time, improving **recommendation accuracy and lead scoring**.

THE WORKING GROUP'S PERSPECTIVE

Prerequisites

- Access to reliable and structured data
- Availability of conversation history
- Clear prospect segmentation

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Guiding principle

Prerequisites for deploying an AI solution vary depending on **ambition level and expected value**.

The higher the objective, the stronger the requirements for **data, governance, and tooling**.

Baseline value → Fewer requirements

To achieve **quick and tangible gains**, organizations can start with a **simple but solid foundation**:

clean, structured CRM data and **basic sales team training** to understand AI recommendations and manage exceptions.

Higher value → Advanced requirements

To scale toward more complex and autonomous use cases, additional prerequisites are needed.

Data preparation

CRM data must be **complete, standardized, and reliable**.

As automation and AI sophistication increase, **data quality becomes a critical performance factor**.

Security and compliance

Scaling the solution requires **appropriate governance frameworks** and controls proportional to data sensitivity and regulatory constraints.

Evaluation framework

Clear indicators must be defined to assess **conversational AI and RAG system performance**, including accuracy, relevance, and faithfulness of responses.

Agent studio

A centralized **AI agent environment** enables prototyping, testing, and large-scale deployment.

No-code or low-code approaches facilitate experimentation and accelerate team adoption.

Detailed description

The group designed a plan to integrate an **AI agent across the entire sales journey**, from lead acquisition to qualification and prioritization.

The AI agent would:

- **Collect data from digital acquisition channels** (social media, online campaigns, inbound messaging tools such as WhatsApp)
- **Aggregate and analyze prospect information automatically**
- **Support the sales team** by qualifying leads, nurturing prospects, prioritizing tasks, and suggesting next actions
- **Help define the most appropriate follow-up strategy** for each prospect

This approach establishes a **more structured, data-driven, and scalable sales process**.

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Closed-loop learning

The solution relies on **continuous improvement**: concrete sales outcomes (prospect responses, meetings booked, opportunity evolution, success and failure reasons) are continuously reinjected into AI models.

This progressively refines **lead scoring and content generation**, improving performance over time.

Evidence-based scaling

To objectively measure AI value, **A/B tests** are implemented.

They compare scenarios with the AI agent enabled (**"agentic ON"**) versus disabled (**"agentic OFF"**), identifying actions that drive performance gains, such as voice-based prequalification or RAG-powered proposal generation.

Maturity journey

AI agent deployment follows a **progressive trajectory**.

The recommended approach starts with **human-assisted workflows**, then introduces **autonomous agents** for well-scoped tasks (lead qualification, follow-up planning).

Ultimately, the goal is to implement **multi-agent orchestration** integrated with CRM, marketing automation (MA), and CPQ tools.

Architecture alignment

Solution robustness relies on a **clearly layered architecture**: core systems, data layer with vector indexing, AI and machine learning models, agent layer, and exposure layer.

Interoperability, observability, and evaluation mechanisms (logging, monitoring, audits) are essential to ensure reliability and control.

NLP for personalization

Natural language processing analyzes **interaction history and customer intent**.

These insights generate **personalized nurturing messages**, tailored responses, and commercial opportunities aligned with **segment-specific playbooks**.

Dynamic workflows

AI-generated decisions and recommendations are directly connected to **CRM automation tools** such as **Salesforce Einstein** or **Microsoft Dynamics Copilot**.

This enables **automatic triggering of operational actions** (follow-up emails, task creation, calendar invites, opportunity stage updates), embedding AI at the core of daily sales processes.