Course Content

Course Description:

AI for Sales Essentials is a practical, scenario-based course that empowers sales professionals to leverage generative AI tools at every stage of the sales cycle. This 6–8 hour interactive training covers key applications such as prospect research, personalized outreach, call planning, CRM automation, and proposal drafting - helping sales teams improve efficiency, win rates, and client engagement. A competency assessment is included, allowing organizations to measure and validate AI proficiency across their sales force.

Course Objectives:

Upon successful completion of this course, students will be able to:

- apply core AI concepts to every stage of the sales cycle, from prospecting and outreach to qualification and follow-up
- use AI tools and effective prompts to research accounts, personalize messaging at scale, streamline sales workflows, and analyze activity data to focus on the most promising opportunities

Prerequisites:

None

Topics:

Lesson 1: Conduct AI-driven research on buyers, companies, and industry trends
- Use AI to gather market, buyer, and competitive intelligence to uncover pain points and priorities

Lesson 2: Personalize outreach and generate sales messaging with AI
- Use AI to draft, refine, and tailor messages and talk tracks to each buyer

Lesson 3: Automate prospecting and lead management with AI
- Use AI to score leads, organize your pipeline, and automate follow-up sequences

Lesson 4: Use AI to prepare for, document, and analyze sales meetings
- Use AI to create pre-meeting briefs, summarize calls, and generate CRM-ready notes and action items

Lesson 5: Co-develop solution strategies and proposals using AI
- Use AI to brainstorm solutions, translate features into business value, and craft competitive, ROI-focused proposals

Lesson 6: Develop account growth and expansion strategies with AI
- Use AI to identify upsell and cross-sell opportunities and generate targeted expansion outreach

Lesson 7: Build sales skills through AI-driven analysis
- Use AI to role-play scenarios, practice objection handling, and receive personalized coaching

Register for this class by visiting us at:
www.tcworkshop.com or calling us at 800-639-3535

NASBA Information

Level: Intermediate

Attendance Requirement: To be awarded the full credit hours, you must sign in and attend the entire course.

Fields: Computer Software & Applications

CPEs: 7.80

Policies: Course Registration, Cancellation, Refund and Complaint Resolution

For more information regarding administrative policies such as complaint and refund, please contact our offices at 800-639-3535 or visit us at: **www.tcworkshop.com**

Official National Registry Statement:

The Computer Workshop is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credits. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org

NOTE: Since our information is in multiple places on our web site or in PDF format that is sent to clients, we have provided our normal course content with the NASBA Information added along with links to our policy page on the web. We will add our name to the Official National Registry Statement after we are approved.