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# How AI Can Supercharge Your Sales

From generating more leads to improving conversion rates and reducing customer churn – **AI is changing the game when it comes to growing revenue.**

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## Artificial Intelligence as a Sales Lever

**Artificial intelligence (AI) has been evolving at rapid pace and is finding its way into more and more areas of everyday business. ChatGPT, for instance, hit one million users just five days after launch – a milestone that took platforms like Instagram and Spotify several months to reach.<sup>1</sup>**

At Prof. Roll & Pastuch (R&P) and Salesfive, we are seeing AI-based tools become an increasingly integral part of daily project work – whether it is R&P applying them to strategic sales and pricing, or Salesfive using them from a tech-driven, operational perspective. From customer segmentation to identifying

optimal prices or creating product bundles, AI offers immense possibilities.

Already today, 75% of sales professionals regularly rely on data-driven insights, and 84% get next-best-action recommendations from their systems.

One example of such a system is the customer relationship management (CRM) tool Salesforce. Salesforce uses AI to help sales teams make smarter decisions, identify qualified leads, and streamline their sales processes. Thereby it is important to distinguish between predictive and generative AI solutions.

*Predictive AI relies on machine learning to process large volumes of data, uncover patterns and correlations, and deliver accurate forecasts. Generative AI, by contrast, uses large language models (LLMs) to understand and mimic human communication, and to generate new content like text or images. To do this, they draw on past communication data and combine it with information from their internal knowledge base.*



AI has the potential to simplify day-to-day tasks in sales. In the following sections, we will take a closer look at some of the key areas where AI can make an impact.



## Scope of AI in the Sales Process

Sales processes can be effectively structured using the well-established AIDA model, which breaks down the path to sales success into four key phases:

- *Attention*
- *Interest*
- *Desire*
- *Action*

**AI can play a vital role in each of these stages.** By using this clear framework, businesses can strategically integrate AI tools into the sales process – maximizing their impact on attracting new customers and strengthening existing relationships.

## Attention

The attention phase of the sales process is all about grabbing the interest of potential customers and getting them curious about a product or service. For many companies – especially in the mid-sized business sector – reaching the right audience with targeted messaging can be a major challenge. This is

where AI can make a real difference. By accurately analyzing target groups, AI helps businesses create relevant, personalized content that speaks directly to the specific needs and interests of their customers.

*Through the use of AI, relevant content can be placed exactly where it has the greatest impact.*



## Content Creation

Professional and relevant content is essential for the first contact in the sales process. This is where generative AI can make a real impact. One example of this is the Agentforce Marketing Campaign Agent from Salesforce, which creates engaging blog posts, social me-

dia content, or advertising copy. The content is not only relevant and individually tailored to the target audience but also optimized for search engines – a major advantage for better online visibility.<sup>2</sup>

## Customized Communication

Based on behavioral data and preference analyses, personalized messages can be created that specifically address the interests of potential customers. Companies benefit from AI features like the Campaign Agent mentioned above also when developing personal-

ized email campaigns. The content and offers of these campaigns are precisely tailored to the individual interests of the recipients. This increases the likelihood that customers will respond to the messages and engage further with the offer.

## Interest

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In the second stage, known as the interest phase, the goal is to build on the initial curiosity and guide potential customers closer to the offering. This phase plays a key role in link-

ing customer needs with the features of the product or service. AI can be a powerful tool in nurturing interest and moving it toward a buying decision.

## Intelligent Product Recommendations

Predictive AI can be a powerful asset in sales by using recommendation engines to anticipate which products a customer is most likely to buy. These forecasts draw on historical data like past purchases, personal browsing habits, and behavior patterns of similar users. Well-timed, personalized product suggestions not only ease decision-making but also show customers that their preferences are truly understood.

An example of a suitable technology in this context is association rule learning. In R&P projects, it is often used to derive rules based on historical data. These rules can be useful for identifying product combinations that are frequently bought together, bringing potential customers closer to the offering, and generating targeted interest.

Find out more in the R&P whitepaper:  
Künstliche Intelligenz im Preismanagement

## Lead Generation

With predictive AI, businesses can pinpoint and qualify leads that are most likely to convert into paying customers. By analyzing how users interact with a website and engage on social media, AI identifies those showing the

highest interest in a product. These insights can then be used to run targeted marketing campaigns and empower sales teams to reach out to the right prospects at the right time.

## Desire

In the Desire phase of the sales process, the goal is to convert customer interest into a genuine wish for a product or service. This stage marks the shift from curiosity to real buying

intent. By leveraging AI, sales teams can deliver personalized messages at the optimal moment, thereby strengthening the customer's desire to make a purchase.

## Sales Forecasting and Demand Analysis

AI-driven sales forecasting uses historical sales data and market trends to generate accurate predictions. A good example is Salesforce Einstein Forecast, which analyzes CRM data to identify the sales opportunities with the highest potential for success. In some companies, the decision of which opportunities to pursue is still made intuitively. With AI-powered insights, sales teams can now focus on the most promising leads – boosting their chances of conversion.

## Personalized Communication and Offers

A key element in sales is maintaining personal communication with prospects. AI can support this by drafting emails that are tailored to individual customer needs, drawing on CRM data and external sources to make each message more relevant and impactful. Personalized product recommendations also play a role here: by analyzing previous purchases and browsing behavior, AI algorithms can suggest products that are more likely to appeal to the customer – boosting the chances of conversion. In the B2B sector as well, machine learning methods can be used effectively to perform basket analyses, uncovering cross-selling opportunities and highlighting untapped potential.

For example, Prof. Roll & Pastuch successfully

*AI helps optimize resource allocation and improve efficiency in sales.*



implemented a project in collaboration with a B2B mechanical engineering company. The team applied association rule learning to examine machine configurations involving over two hundred options. The results were translated into actionable rules, helping to identify commonly combined features and recurring usage patterns. This data mining approach revealed numerous connections between products and laid the foundation for creating compelling product bundles.



## Action

AI is becoming increasingly influential in the action phase of the AIDA model – the critical stage where a potential customer makes their final buying decision and the sale is closed. At this point, specific strategies are implemented to lead the customer toward conversion and ensure the deal goes through. AI-driven tools support this process by streamlining sales operations and boosting the productivity of sales teams.

*During the action phase, AI helps sales teams increase the conversion rate through precise data analysis and real-time recommendations.*



### Automated Follow-Ups

A major part of this phase is automating follow-up activities. AI can handle reminders and follow-ups automatically, ensuring potential customers are contacted at just the right moment – without the need for manual input. For example, “Einstein Activity Capture,” integrated into Salesforce Sales Cloud, tracks all activi-

ties like emails and calls in real time and maps out the interaction timeline effectively. With this reliable data foundation, follow-ups can be managed seamlessly and automatically, which increases the chances of closing a deal.<sup>3</sup>



## AI-Based Real-Time Coaching

Another essential component of the action phase is real-time coaching for sales teams. Tools like Salesforce's built-in Einstein Conversation Insights analyze sales calls, highlighting key moments, such as customer objections or effective selling strategies. These real-time insights provide immediate feedback, helping reps refine their messaging and techniques. Not only do they shorten the ramp-up time for new hires, but they also boost the overall performance of the team. On top of that, the tools generate transcripts and create follow-up tasks based on what the customer says, making it easier to track and follow up on opportunities.<sup>4</sup>

## Customer Retention and Relationships

During and after the action phase, it is important to focus on customer retention and reducing churn. AI-supported solutions offer detailed insights into customer relationships and their networks. By analyzing CRM and on-

line data, these systems identify key contacts and their roles – allowing sales teams to reach out to decision-makers and influential stakeholders without manual research. This makes it easier to build and maintain strong business relationships.<sup>5</sup>

AI can also be used for churn prediction through classification models. These systems learn from historical data showing which customers stayed and which ones left. Using that knowledge, they can estimate the churn risk of current clients, so the sales team can proactively step in with the right retention strategies.\*

When used strategically in the action phase, AI can help businesses streamline sales processes, boost team efficiency, and strengthen customer loyalty. This leads to a higher conversion rate and more resilient customer relationships.

\* Find out more in the R&P whitepaper:  
Künstliche Intelligenz im Preismanagement





## AI Integration in CRM systems like Salesforce

**CRM systems like Salesforce bring all customer data together into a single source of truth, streamlining sales processes and increasing both productivity and quality across the organization.**

By integrating predictive and generative AI, these systems gain powerful new capabilities that directly address the needs of today's sales teams. Salesforce, for instance, leverages its AI platform Einstein to embed intelligent features directly into its tools, each designed to support specific sales use cases. In the following, we present a selection relevant to sales.<sup>5</sup>

### Predictive Analytics with Salesforce Einstein Prediction Builder

Custom prediction models, like Salesforce Einstein Prediction Builder, help sales teams to identify and prioritize opportunities early on. Sales representatives can recognize how likely customers are to renew or cancel contracts, a process known as churn prediction. The tool

also forecasts potential deal values or expected closing dates. It can even predict when a previously sold piece of equipment might fail, giving the sales team a chance to proactively offer maintenance. This allows teams to focus their efforts where it matters most, significantly improving the overall efficiency of the sales process.<sup>6</sup>

### Lead Prioritization with Salesforce Einstein Opportunity Scoring

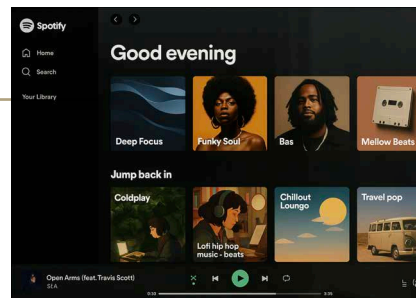
A high number of opportunities challenges sales teams to always keep an overview and to primarily focus on the opportunities with the highest probability of purchase. Salesforce Einstein Opportunity Scoring takes over exactly this prioritization and determines the most promising sales opportunities based on historical and current customer data. The tool assigns a score to each opportunity and highlights the specific data points that influenced the rating.<sup>6</sup>



## Success Story: Spotify Optimizes Ad Business

*The streaming provider Spotify presents its users with advertisements that are precisely tailored to their interests. In the past, manual workflows and confusing data made this a complex task. With the AI-powered analytics of Salesforce Sales Cloud Einstein, the ad sales team now has a holistic view of its advertising business – in real time. Tools like Einstein Opportunity Scoring enable the team to work faster and close deals more efficiently.*

*The result of introducing AI speaks for itself: Spotify has significantly reduced the number of meetings and emails. The productivity of the sales team increased by 40%, customer data for campaigns can now be retrieved 95% faster, and annual ad revenues rose by 19%.<sup>7</sup>*



## Individual AI Agents with Salesforce Agentforce

Since fall 2024, the generative AI solution Agentforce has been expanding the Einstein portfolio with its autonomous AI agents. With just a few clicks and no coding skills required, sales teams can create their own customized Agentforce assistants – known as agents. These agents interpret data from Salesforce and external sources on their own, handle routine tasks in the background, and make informed decisions. They are available 24/7 to respond to customer inquiries, score leads,

and optimize campaigns – or even act as sales coach agents, helping sales representatives practice and improve their pitches. In doing so, Agentforce imitates natural language and continuously learns.

This allows the team to fully focus again on its core tasks and personal customer relationships – for greater efficiency and customer satisfaction.<sup>8</sup>

## Conclusion

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Artificial intelligence is transforming every stage of the sales process – a fact already evident in the day-to-day work of Salesfive and Prof. Roll & Pastuch.

Whether it is increasing efficiency or enhancing the quality of customer interactions, AI is making a tangible impact. From pinpointing new sales opportunities to automating routine tasks, the possibilities for AI integration within Salesforce are extensive. At the same

time, Roll & Pastuch's successful projects also demonstrate how AI can assist in generating pricing proposals, creating product bundles and hierarchies, analyzing tender documents, and much more.

**Whether predictive or generative, companies that embrace these technologies today stand to gain lasting competitive advantages – and secure the long-term loyalty of their customers.**



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### Quellen

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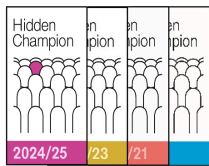
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