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## **The new Sales Process for Manufacturing**

This practical guide shows manufacturing companies step by step how to successfully introduce AI in sales.

## Introduction

Manufacturing companies today have a wide range of options for optimizing their sales to improve the stagnating order situation. This includes, for example, identifying new sales opportunities with existing customers, understanding incoming inquiries quickly and comprehensively, making processes more efficient and shortening closing cycles. The use of artificial intelligence (AI) in sales offers great potential here to secure competitive advantages and remain successful in the long term. This white paper shows manufacturing companies how they can use a CRM solution in combination with AI to acquire more new customers and increase sales with existing customers at the same time. It highlights ways in which the lead-to-cash process can be streamlined and employees can be relieved of routine tasks at the same time.



## Importance of CRM and AI

As a single source of truth for all customer-related processes, a CRM system forms the basis for successful sales. If this system is combined with AI solutions, companies can generate valuable knowledge from the data and automate the lead-to-cash process. A distinction is made between predictive and generative AI solutions:

- Predictive AI solutions reliably predict future events or trends. To do this, they analyze historical data and identify patterns and correlations. Sales employees can use the results to make precise, data-based decisions.
- Generative AI solutions use large language models (LLMs) that automatically generate texts based on customer communication. Email campaigns, offers or answers to customer questions can be created automatically and must only be checked and adapted if necessary.

With these options on board, a CRM system becomes a game changer that proactively makes recommendations and simultaneously increases the productivity of the sales team.

## The modern sales lifecycle at a glance

By combining CRM and AI, companies can improve their order situation and streamline processes at the same time. Existing customers are supported in line with their needs, while potential customers are met with a comprehensive understanding of their requirements from the outset. In both areas, the link between CRM and AI can lead to optimal advice, personalized offers, and ultimately more business deals. The corresponding sales lifecycle comprises the following five steps:

- **Marketing Customer Journey:**  
In the first step, new inquiries are recorded in the CRM system - regardless of whether they are received via an SEO campaign, a social media channel or a form on the website, for example. The starting point of each customer is documented in the CRM system via the various marketing channels, with sales having access to all activities and the history.
- **Lead Capture and Enrichment:**  
AI functions then enrich the leads with data from the internet, such as company locations or employee numbers. In addition, intelligent validation tools ensure that the data is entered correctly and completely into the CRM system when new contacts are created.
- **AI Initial Lead Scoring:**  
AI solutions then classify and prioritize the incoming requests. Which characteristics are taken into account for new contacts varies from company to company. Typical criteria include company size and industry affiliation. AI solutions prioritize requests from existing customers based on their history. For example, if a customer repeatedly requests offers that they do not take up, their inquiry is given a lower score. With this scoring, the sales team can initially focus on leads with a high probability of purchase.
- **AI-Powered Lead Assignment and Engagement:**  
In the next step, AI functions assign the leads to the relevant sales team or employee and provide initial specific recommendations for targeted sales measures. In the case of existing customers, this is

based on information about the products in use, for example, from which cross- and upselling opportunities can be derived.

- **AI-Supported Follow-Up and Proposal:**  
AI solutions are also able to recognize correlations in order to derive additional sales opportunities. Sales employees receive information that enables them to contact customers proactively and provide them with the best possible support when concluding offers and contracts.

Also, AI solutions can draw conclusions about additional sales opportunities from the history stored in the CRM system. This proactively suggests hidden potential for cross- and upselling measures to employees. For example, if a customer places job advertisements for another location, it can be concluded that they need more machines. A welcome opportunity to place the corresponding offer. Service employees also receive proactive recommendations for contacting customers via AI functions. One example of this is upcoming maintenance appointments.

In addition, AI solutions automatically compose personalized emails based on the data stored in the CRM system in order to arrange appointments. They generate automated marketing campaigns that are tailored to customer behavior and preferences, which lead to a positive impact on the customers relation and overall satisfaction. Last but not least, AI solutions create personalized offers, which are often very complex and extensive, especially in the manufacturing industry. This relieves the back office and shortens response times.

## Recommendations for the implementation of AI

The following approach is recommended so that companies can increase the efficiency of their sales with AI solutions:

- 1. Analysis of the current data base and CRM status:**  
This involves checking how the existing CRM system is being used and what the data quality is like. Identified weaknesses are then eliminated through suitable

measures. In concrete terms, for example, employee training can optimize the use of the CRM solution. Customer data should be regularly cleansed by removing duplicates, correcting errors and updating outdated information. This can be largely automated with the help of AI. It is also advisable to check the existing sales process for optimization potential.

#### **2. Tool selection:**

In principle, companies can opt for in-house development or acquire an AI solution that is already available on the market (make or buy). The choice of tool should be made based on the desired use cases and the existing IT infrastructure. In any case, this is an individual decision in which it is advisable to involve internal or external experts.

#### **3. Change management:**

Training courses and information talks are used to reduce employees' potential fears of contact and allay any concerns that AI tools could make their own workplace redundant.

#### **4. Monitoring and continuous improvement:**

Finally, the newly established sales processes are intensively analyzed and successively optimized.

## **Sales agents: The new helpers in everyday working life**

CRM provider Salesforce recently released Agentforce, a new solution that enables companies to create AI agents easily. These agents can take on tasks independently, such as analyzing data or making decisions. Typical areas of application are customer service, sales and marketing. For example, Agentforce's AI agents independently answer customer queries, qualify sales leads and optimize marketing campaigns. They solve these tasks autonomously on the basis of available data, business rules and predefined automations or via API calls from other applications. Agentforce thus reduces the workload on employees, increases productivity, and contributes to greater customer satisfaction.

„Agentforce is a pioneering and trusted solution that seamlessly integrates AI into every workflow and is deeply embedded in the customer journey. It makes

it possible to identify needs early, strengthen relationships, drive growth and take action in every interaction,“ summarizes Marc Benioff, Chairman and CEO of Salesforce.

## **Conclusion**

AI solutions enable manufacturing companies to generate valuable insights from customer data, paving the way from traditional to modern, assistive, autonomous sales. Companies with AI-supported sales optimize their sales pipeline, increase their turnover and relieve their employees at the same time. In this way, they remain competitive and are equipped for current and future challenges.

The time is ripe to use AI solutions as a strategic tool. This is because the technology has long since outgrown its infancy and has been proven to open up immense potential for companies. Get ahead of your competitors and integrate AI functions into your sales lifecycle now! As your partner, we support you with our many years of experience and the know-how we have gained from numerous CRM and AI projects.



## Would you also like to ...

- discover sales opportunities, cross- and upselling potential more quickly?
- optimize the way your sales teams work and thus save valuable time?
- enable all departments to have a 360° view of your customers in order to offer the best service?
- secure competitive advantages with an AI-supported sales process?

We know the challenges of medium-sized and large companies in the manufacturing industry from over 150 successful customer projects. We bring this knowledge and the expertise gained from numerous other implementation projects with customers from a wide range of industries to your digitalization project. Let us advise you now, without obligation, on what is possible!

## Your direct contact to us



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