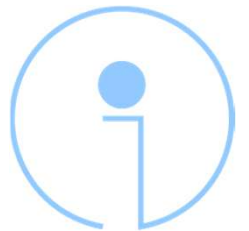


# AI for sales and marketing

Luke Williams – Group Head of AI, Intergage



intergage



# Aims of today

- Showcase range of AI tools you can use for sales and marketing
- An example of how to combine AI tools in a single use-case
- Using AI for sales calls
- Doing detailed product, market or competitor research
- Creating useable personas

# “Yes, and..” - AI for sales prospecting calls

1

Identify the specific questions you need to include in the call

2

Create an example Sales Proposal document

3

Transcribe the call using CoPilot, Otter or Fireflies

4

Prompt ChatGPT to convert the transcript into a draft proposal

# 1: Identify the specific questions you need to include in the call

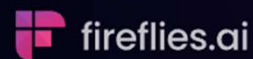
- What information do you need to qualify the call?
- What key facts do you need to know about the company?
  - IE number of employees
- Do you know their likely timeframe?
- Have you captured their key requirements?
- Do you know all their pain points?
- Who is their current provider, when are they due to renew?

## 2: Create or prepare an example Sales Proposal document

- With the questions from #1 in mind produce an example Sales Proposal document
- Ensure there are clear sections where each of the questions from 1 will be used
- NOTE: If you already have a SP example steps 1+2

### 3: Use an AI to transcribe and summarise calls

- Use a tool like CoPilot, Otter.ai or Fireflies to transcribe the call
- Ensure you are clear with the prospect that you are doing so
- Use a paid-for version, and ensure relevant privacy protections are enabled



## **4: Prompt ChatGPT to convert the transcript into a summary – pt 1**

I have provided two inputs:

1. An example Sales Proposal document that shows the desired format and structure for summarizing a sales call.
2. A transcript of a call containing specific questions and responses.

Your task is to:

Review the call transcript.

Extract the key information relevant to each section in the example sales summary.



## 4: Prompt ChatGPT to convert the transcript into a summary – pt 2

Output a new Sales Proposal formatted exactly like the example document, including all headings, subheadings, and any required detail.

### input documents:

- 1. Example Sales Proposal Document [Filename]**
- 2. Call Transcript [Filename]**

### important information

Please produce the Sales Proposal in the same style, structure, and tone as the example document.



# Deep Research AI agent

- Perplexity Deep Search / Google Deep Research / ChatGPT Deep Research
- Uses latest models to do multi-step research
- Complex searches can take 5-30 minutes to run
- Produce research papers to PHD standard
- Is your website readable by AI Agents?

# OpenAI - Deep Research

What are you researching?

Breeze Content Agent

Bullet points:

Requires Content Hub Pro

Create content, including podcasts based on CRM data

Drafts tailored to audience

Opportunity / use-case:

Use Content agent to do an SEO brainstorm to identify areas to capture traffic



Search

Deep research



4 available until March 28

Get detailed insights on any topic

Please research and summarise the main AI offerings from HubSpot.

The aim is to produce a report for a B2B marketing agency on the kind of tools that are included to inform their staff.

For each tool or major feature you should create a 3-5 bullet point list of notable features, considerations or requirements as well as 1 opportunity or example use-case

#### example feature

Feature name:

Breeze Content Agent

Bullet points:

Requires Content Hub Pro

Create content, including podcasts based on CRM data

Drafts tailored to audience

Got it! I'll research HubSpot's AI tools and provide a structured report summarizing each key feature using the format you provided. This will include AI tools across all HubSpot products (marketing, sales, service, etc.), highlighting notable features, product tier requirements, and potential use cases.

I'll let you know once the report is ready.

Reviewing AI-driven features

1 source

## HubSpot AI Tools Overview for B2B Marketing Agencies

I'm mapping out HubSpot's AI-powered tools, focusing on Marketing, Sales, Service, and Content Hubs. Highlighting AI features, requirements, and actionable use-cases for each hub.

Searched for HubSpot Content Hub AI features

Piecing together HubSpot's AI features

Searched for HubSpot predictive lead scoring

Slimming down options to predictive scoring, likely an Enterprise feature.

Read [evenbound.com](https://www.evenbound.com)

I'm pulling together details on HubSpot's

Research completed in 7m · 26 sources

# HubSpot AI-Powered Tools & Features Across the Product Suite

## Marketing Hub – AI Features for Marketing Automation & Lead Gen

### AI Email Content Writer

HubSpot's AI email assistant helps marketers draft professional marketing emails and newsletters in seconds. It uses prompts about the email's intent, audience, and tone to generate copy that you can refine.

- Generates email copy based on your inputs (e.g. promotional, newsletter, follow-up) and preferred tone (professional, friendly, witty, etc.) [HUBSPOT.COM](#) ↓
- Integrated directly into HubSpot's email editor – marketers can review, edit, and personalize the AI

Ask anything



Search



Deep research



### Citations



hubspot.com

#### HubSpot's AI Sales and Marketing Tools

HubSpot's AI content assistant can help by writing professional emails for your sales team. You direct...



hubspot.com

#### HubSpot's AI Sales and Marketing Tools

combination of these to get just the right feel you need.



knowledge.hubspot.com

#### Generate content using AI

Image All products and plans



hubspot.com

#### HubSpot's AI Sales and Marketing Tools

These days, blog posts need to be linked to your socials to reach the places where your potential...



knowledge.hubspot.com

#### Determine likelihood to close with predictive lead scoring

Using predictive machine learning algorithms, HubSpot analyzes your customers to determine the...

# NotebookLM from Google



Allows you to add multiple documents into a Notebook



Create a podcast from the included documents for easy learning



Ask questions and add notes



Share with colleagues (for Google Workspace users)



# NotebookLM use-cases

- Onboard new employees to existing customers
- Review long and complex documents
- Produce a podcast based on a whitepaper



## NotebookLM

Sources ⓘ  
Select all sources ✓  
Towards Sustainable ... ✓

### Sustainable AI: A Net Positive Approach

Settings Share ⓘ

#### Help me create

FAQ Study guide Table of contents  
Timeline Briefing doc

#### Audio overview ⓘ

Deep dive conversation  
Two hosts (English only)  
Customise **Generate**

#### Summary

This document explores the environmental and social impacts of Artificial Intelligence (AI), particularly the surge in energy consumption from Generative AI. **It argues that AI's negative effects, such as increased carbon emissions and resource depletion, must be mitigated through responsible development and usage.** The author proposes a "Net Positive" approach, balancing AI's environmental costs with its potential benefits in areas like sustainability and healthcare. This involves "greening" AI's infrastructure, focusing on ethically driven applications, and making sustainable decisions in the short term. **The document calls for collaboration between businesses, governments, and citizens to achieve a sustainable AI future.** Finally, it emphasizes the crucial role of human responsibility in shaping AI's trajectory.

#### Suggested questions

How can AI's environmental impact be mitigated effectively?  
What are AI's most impactful positive and negative applications?  
How can businesses, governments, and citizens foster sustainable AI?

View chat

1 source Start typing... →

\* Notebook guide

NotebookLM can make mistakes, so double-check it.




# NotebookLM


Sources  

Select all sources 

 Towards Sustainable ... 

## Sustainable AI: A Net Positive Approach

 Settings

 Share



### Help me create

 FAQ


 Study guide

 Table of contents

 Timeline

 Briefing doc

### Audio overview

Sustainable AI: A Net Positive A...



00:00 / 29:29

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### Suggested questions



How can AI's environmental impact be mitigated effectively?



What are AI's most impactful positive and negative applications?



How can businesses, governments, and citizens foster sustainable AI?

 View chat

1 source

Start typing...



 Notebook guide

NotebookLM can make mistakes, so double-check it.

# Using an LLM to create a persona

- Work with the LLM to create a persona
- Then ask it questions
- Also ask it to act as that persona and speak to it 121
- Live demo... fingers crossed!

# Customer service and voice calling

01

Adding an AI chatbot to your website

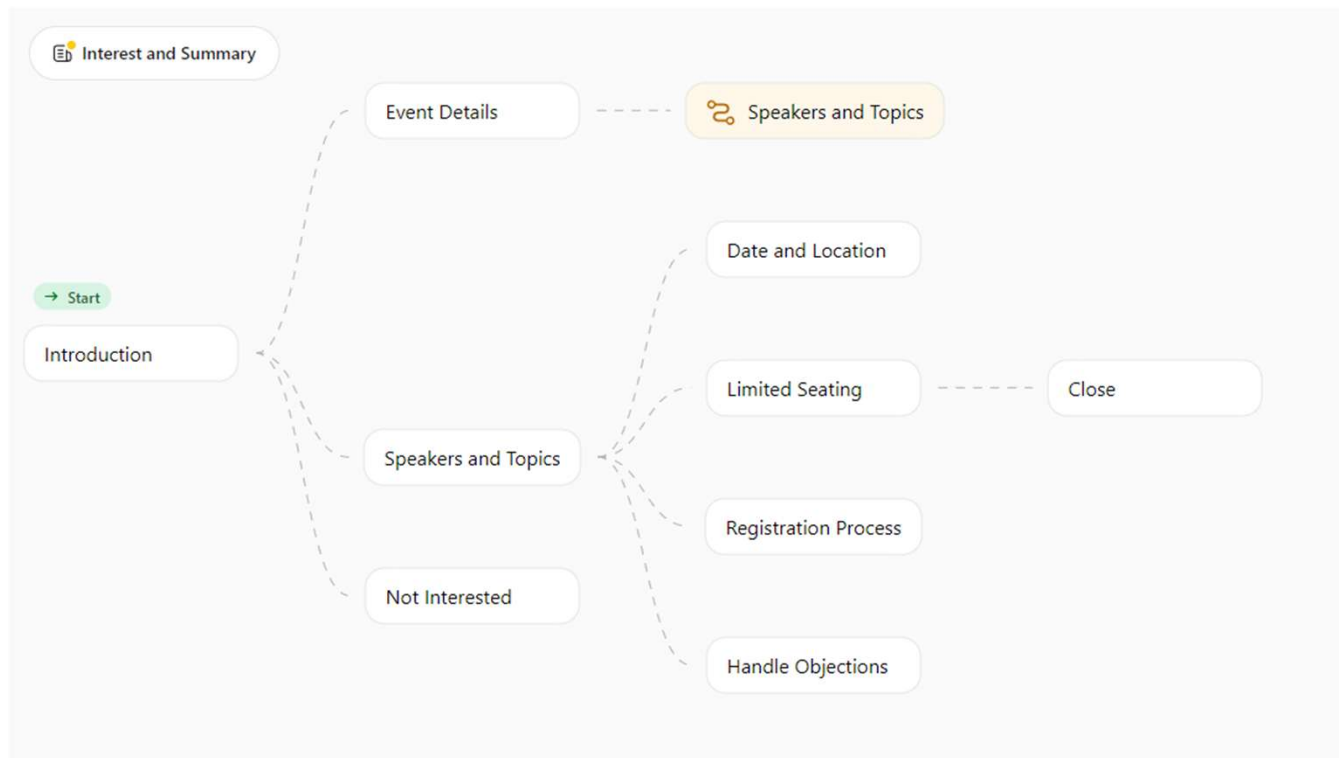
02

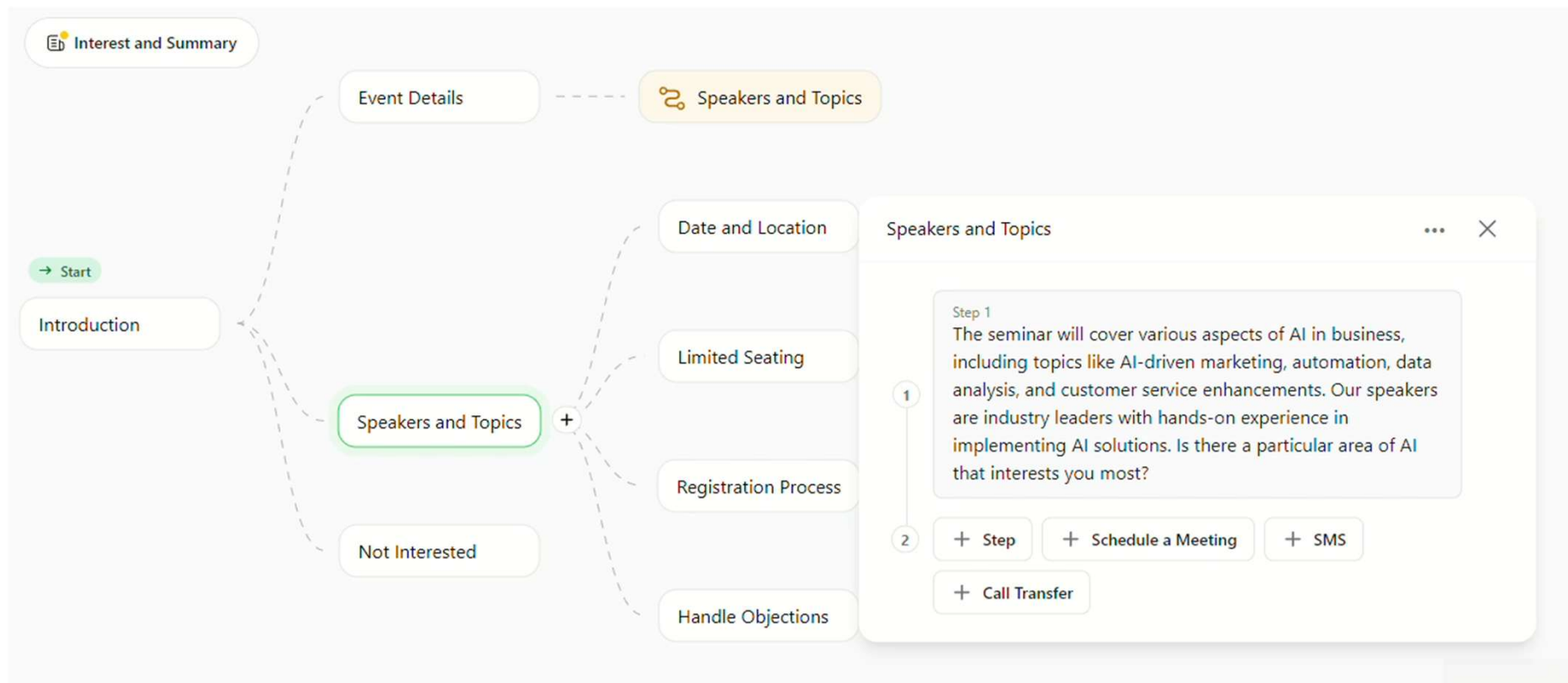
Qualifying old or warm leads via WhatsApp or phone

03

Completing a requested callback for more information

# Example of requested callback campaign





# **Thank You + time for Q&A**

[Linkedin.com/in/lukewilliams](https://www.linkedin.com/in/lukewilliams)



# Subscribe to our AI Newsletter



- LinkedIn: [Intergage Group – AI: Actionable Insights](#)

Subscribe





# Links

- Intro to AI video (45mins) - <https://www.youtube.com/watch?v=g6esfn5v540>
- [Plix.ai](#) – voice agent