CompTIA AI for Sales Essentials

Overview

CompTIA AI for Sales Essentials is a practical, business-focused training designed to equip sales professionals with the knowledge and skills to leverage Generative AI throughout the sales lifecycle. Participants will learn how AI can support buyer and market research, prospecting, personalized outreach, meeting preparation, proposal development, negotiation, sales coaching, and account growth.

The course combines fundamental AI concepts with hands-on sales scenarios, enabling participants to apply AI tools effectively while maintaining accuracy, data privacy, security, and responsible AI practices. Participants will develop practical AI-assisted workflows that can improve sales productivity, customer engagement, and the overall effectiveness of sales activities.

Duration

7 Hours

Learning Outcomes

By the end of the training, participants will be able to:

- Apply Generative AI and effective prompting techniques to support common sales activities while ensuring responsible and secure use of AI.
- Conduct AI-assisted buyer, company, and market research to identify customer needs, pain points, communication preferences, and sales opportunities.
- Use AI to enhance the sales cycle, including prospecting, personalized outreach, meeting preparation, proposal development, objection handling, and follow-up activities.
- Leverage AI-driven insights for sales performance and account growth, including sales coaching, customer engagement, upselling, cross-selling, and opportunity development.

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Course Objectives

The course aims to enable participants to:

- Introduce participants to the fundamentals of Generative AI and prompt engineering and demonstrate how these technologies can be applied to sales-related tasks.
- Develop participants' ability to use AI for prospect research, lead qualification, customer profiling, and personalized sales communication.
- Enable participants to use AI to improve sales productivity, including meeting preparation, sales documentation, proposal creation, ROI analysis, and objection handling.
- Promote responsible and effective adoption of AI in sales by addressing AI limitations, output verification, customer data protection, privacy, and ethical considerations.

Target Audience

This course is suitable for:

- Sales Representatives
- Account Managers
- Business Development Representatives (BDRs)
- Business Development Executives
- Sales Operations professionals
- Customer Success professionals
- Inside Sales Specialists
- Sales Managers and Team Leaders

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OUTLINE

Module	Topic Coverage
Module 1 — AI Fundamentals & Prompting for Sales	• Introduction to Generative AI in Sales • AI capabilities and limitations • Understanding effective prompts • Context, role, task and output instructions • Verifying AI-generated information • Responsible and secure use of AI
Module 2 — AI-Powered Buyer & Market Research	• AI-assisted prospect research • Company and industry research • Creating buyer personas • Identifying customer pain points and priorities • Analysing customer communication preferences • Creating prospect briefs and sales battle cards
Module 3 — AI for Prospecting & Personalized Outreach	• AI-assisted lead research and qualification • Lead prioritization • Personalized email generation • Creating multi-channel outreach sequences • Developing customer-specific value propositions • Maintaining authentic human communication
Module 4 — AI for Sales Meetings & Discovery	• AI-assisted meeting preparation • Creating meeting briefs • Developing discovery questions • Preparing for customer conversations • Meeting summaries and action items • Converting meeting information into CRM-ready notes
Module 5 — AI for Proposals, ROI & Negotiation	• Developing sales proposals with AI • Creating value-focused proposals • AI-assisted ROI analysis • Refining proposals for different stakeholders • Objection-handling techniques • Negotiation simulation using AI
Module 6 — AI Coaching, Follow-Up & Account Growth	• AI-assisted sales performance coaching • Analysing sales conversations and transcripts • Identifying areas for improvement • Generating follow-up communications • Identifying upselling and cross-selling opportunities • Account growth and expansion strategies

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Module 5 — Agent Memory & Knowledge	• Context vs memory • Short-term state • Long-term memory • Knowledge sources • Information retrieval • What should an agent remember? • What should an agent discard? • Data minimisation considerations • Activity: Decide what information an agent should retain
Module 6 — Safe, Secure & Responsible Agents	• Why safety is a design decision • Agent guardrails • Validation and restrictions • Least-privilege principle • Permission management • Human-in-the-loop controls • Human review points • Privacy, accountability and trust • Activity: Design safety controls for a high-risk agent scenario
Module 7 — Testing, Evaluating & Monitoring Agents	• Evaluating agent outputs • Expected vs actual results • Identifying agent errors • Diagnosing workflow problems • Monitoring agent behaviour • Performance signals • Identifying uncertainty • Recognising potential failures • Communicating agent limitations • Continuous improvement • Activity: Evaluate and improve an AI agent based on simulated performance