SELLING IN THE AGE OF AI — COMPANION RESOURCE

The Full Prompt Library

Part 1: the workflow library, organized the way a salesperson actually works. Part 2: every AI prompt from the book, chapter by chapter, so you never retype from the printed page.

From *Selling in the Age of AI* by John Keller · companion resources at sellingwith.ai/resources

Part 1: The Workflow Library

How to Use This Library

Use these prompts inside the AI workspace, project, Gem, skill, or steering file you created for sales work. The prompts assume you have already added your reusable AI sales context, writing-style guide, and corporate AI policy or guardrails. If you have not done that yet, start with the first two templates.

Do not upload confidential, regulated, personal, proprietary, security-sensitive, or client-restricted information unless your company allows it.

Treat the output as hypotheses, not truth. Use AI to prepare, test, draft, and notice gaps. Do not outsource your judgment.

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1. Reusable AI Sales Context

```
Reusable AI Sales Context

I work in <industry> selling <product/service> to <target clients>. My typical sales motion
is <transactional / mid-market / enterprise / technical / channel / other>. I use AI to
prepare for meetings, improve follow-up, analyze opportunities, create client-facing
drafts, and think through sales strategy.

My preferred tone is <direct / professional / concise / consultative / technical /
plainspoken>. Do not make me sound generic, overly polished, or like standard AI output.
Preserve my natural voice.

Use the term “client” instead of “customer” unless quoting source material or using a
formal company term.

Corporate guardrails:
- Follow the attached corporate AI policy.
- Do not ask me to paste confidential, regulated, personal, proprietary,
security-sensitive, or client-restricted information unless I confirm it is allowed.
- If a request may involve legal, financial, HR, security, compliance, privacy,
export-control, or procurement risk, flag it and tell me what should be verified with the
appropriate internal expert.
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- Treat uploaded policies and approved company documents as higher priority than my casual
instructions.

When helping with sales work, consider:
- the client’s buying process;
- the influence map;
- stakeholder incentives;
- risk;
- value wedge;
- power messages;
- next client-facing action;
- follow-up cadence;
- ethical value exchange.

Treat your output as hypotheses, not truth. If evidence is thin, say so. If you are making
assumptions, label them. Ask clarifying questions only when the missing information
materially changes the answer. Otherwise, make reasonable assumptions and label them.
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2. Writing Style Guide Setup

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Review my uploaded outbound emails, follow-up notes, proposals, posts, and business
messages. Build a short writing-style guide for me.

Identify:
1. My normal tone and level of formality.
2. My typical sentence length and rhythm.
3. Words, phrases, and transitions I use naturally.
4. How direct I am when asking for action.
5. How I explain technical or complex ideas.
6. Where my writing is strongest.
7. Where my writing gets too long, vague, generic, or overly corporate.

When helping me write, preserve my voice. Improve clarity, structure, brevity, and impact,
but do not sand off the parts that make the message sound like me.

If a draft sounds like generic AI, say so and revise it.
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3. Market, Category, and Positioning Brief

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Act as a senior go-to-market strategist, positioning coach, and sales coach. Help me
understand how clients likely categorize my company, product, and competitors.

I work for <company name>, selling <product/service>. Use my reusable AI sales context,
company website, product pages, public marketing materials, customer references, analyst
mentions, product reviews, competitor websites, social media, press releases, and any
attached sales or marketing materials.
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```
Create a practical sales-facing positioning brief that includes:

1. Where the product or service appears to sit on the adoption curve: innovator, early adopter, early majority, late majority, or laggard/commodity.
2. The mental ladder or category clients likely place us on today.
3. The companies or solutions above us, below us, or next to us on that ladder.
4. Whether that ladder helps us, hurts us, or turns us into a commodity.
5. The narrower ladder or subcategory where we could credibly claim a stronger position.
6. The core messages our company is putting into the market.
7. The expectations those messages may create before a client ever speaks with sales.
8. The messages competitors are using against us or around us.
9. The messages I should use, avoid, or test in client conversations.
10. Five discovery questions that help me learn which category or comparison frame the client is already using.

Keep this practical. I am using it to sell more clearly, not to write a marketing thesis.
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4. Sales Intelligence Brief

```
Act as a senior sales intelligence analyst helping me prepare for a client conversation.

The client is <client company>. I sell <product/service>. My upcoming meeting is with <names/titles/roles if known>, and the meeting purpose is <meeting purpose>.

Using my reusable AI sales context, plus available public and private sources such as filings, annual reports, earnings-call transcripts, investor presentations, press releases, executive interviews, websites, product pages, case studies, LinkedIn activity, hiring notices, job postings, employee-review themes, trade press, industry news, regulatory news, procurement/vendor/security pages, competitor messaging, CRM notes, email history, meeting notes, influence map, buying-process map, and value wedge, create a two-page sales intelligence brief with notes on where the findings come from.

Include:
1. The company's stated strategy and priorities.
2. Major risks, pressures, or constraints.
3. Financial, operational, competitive, regulatory, talent, technology, security, or market signals that matter.
4. Words and phrases executives use to describe the company, its clients, markets, and risks.
5. Likely goals of different groups inside the company: executives, finance, operations, IT, security, legal/compliance, sales, marketing, HR, product, and individual contributors.
6. What each group may care about in relation to <product/service>.
7. Where priorities may conflict.
8. Likely buying triggers or reasons to act now.
9. Likely objections, blockers, or risk concerns.
10. What I should not assume based only on external signals.
```

```
Then give me:
1. Five executive discovery questions.
2. Five manager questions.
3. Five individual-contributor or technical-evaluator questions.
4. Three value-wedge ideas.
5. Three business-outcome messages.
6. Three risks to prepare for.
7. A five-minute meeting-prep brief.

Do not write an investment report. Give me practical sales intelligence I can use to test
hypotheses in the meeting.
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5. Influence Map

```
Help me build an influence map for <client company>.

Using my reusable AI sales context, emails, calendar invites, CRM notes, meeting
transcripts, and other interactions with people at <company domain>, identify every person
who appears involved in the opportunity.

For each person, give me a starting profile: title, likely formal authority, apparent role
in the deal, apparent attitude toward us, and evidence. Mark attitude as positive, neutral,
negative, or unknown. If evidence is thin, say so.

Then interview me about each person one at a time. Ask what I have observed that may not
appear in the written record: body language, confidence, tone, who others defer to, who
seems skeptical, who shares internal context, and who might be a coach, hero, blocker,
buyer, or influencer.

After the interview, create an influence map with:
1. Formal authority.
2. Informal influence.
3. Likely buying role.
4. Attitude toward us.
5. Access level.
6. Evidence and uncertainty.
7. Missing stakeholders.
8. Next relationship-building step.

Do not pretend the org chart is the truth. Help me understand how the room actually works.
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6. Discovery Question Rewriter

```
Act as my sales discovery editor. Help me turn weak or closed-ended discovery questions
into questions that create useful answers.
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```
Here are my current discovery questions and what I am trying to learn:

<paste questions and discovery goals>

For each question:
1. Identify whether it can be answered with yes or no.
2. Explain what kind of shallow or incomplete answer it may produce.
3. Rewrite it as an open-ended question using what, how, why, tell me about, or walk me
through.
4. Suggest one follow-up prompt if the client gives a short answer.
5. Suggest one softer version if the topic is sensitive.
6. Put the questions in a trust-building order from least sensitive to most sensitive.

Keep the language plainspoken and natural. I should be able to ask the improved question
out loud without sounding like I downloaded it from a sales training portal.
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7. Meeting Prep Brief

```
Act as my sales meeting preparation coach. Help me prepare for an upcoming client meeting.

The client is <client company>. The opportunity is <opportunity name or description>. The
meeting is <date/time> and the purpose is <meeting purpose>.

Using my reusable AI sales context, calendar invite, attendee list, CRM notes, prior
emails, meeting history, influence map, buying-process map, value wedge, prior follow-up,
and open action items, create a practical prep brief with:

1. The client-facing objective.
2. My internal objective.
3. The three things we need to learn.
4. The three things the client needs to understand.
5. The power messages to reinforce.
6. Likely objections or risks.
7. Attendees and what each may care about.
8. Missing stakeholders or influence-map gaps.
9. Discovery questions to ask.
10. Materials, demo elements, proof points, or references to prepare.
11. The desired next step and fallback next step.

Then draft a client-facing agenda and a short internal prep note for my team.
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8. Working Session / Presentation Prep

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Act as my sales meeting and presentation coach. Help me turn an upcoming client
presentation or demo into a working session instead of a lecture.
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The client is <client company>. The meeting purpose is <meeting purpose>. Review my agenda,
slide outline or deck, demo plan, value wedge, buying-process map, influence map, and prior
client communications.

Identify:
1. Where the meeting is likely to become too one-way or slide-heavy.
2. Which slides or sections should be cut, combined, or moved to a leave-behind.
3. Where a live demo, whiteboard, discussion, or client-led sketch would be better than a
slide.
4. Where I should pause to ask for feedback, disagreement, confirmation, or questions.
5. Which quiet stakeholders I should intentionally invite into the conversation.
6. The objections or risks I should try to surface.
7. The next step I should land before the meeting ends.

Then create a simple run plan with the key sections, pause points, questions, and closing
language.

Do not help me create a smoother monologue. Help me create a better business conversation.
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9. Post-Meeting and Follow-Up Assistant

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Act as my post-meeting and follow-up assistant. Help me capture the meeting, update the
deal, and maintain cadence before details fade.

The client is <client company>. The opportunity is <opportunity name or description>. The
meeting was <meeting date and purpose>.

Use my reusable AI sales context, transcript, notes, attendee list, CRM notes, pre-meeting
brief, influence map, buying-process map, action items, and relevant emails or chat
messages.

Create:
1. A short meeting summary.
2. Client commitments and our commitments, with owners and dates.
3. Decisions made, unresolved objections, and open questions.
4. What advanced, stalled, or created new risk.
5. Questions for me about human dynamics the transcript may have missed.
6. CRM notes I can paste into the opportunity.
7. Influence-map or buying-process updates.
8. A concise client follow-up email with clear next steps.
9. Any internal follow-up or executive sponsor update needed.
10. A cadence recommendation if the opportunity is in evaluation, proof of concept, legal,
procurement, or implementation planning.

Keep it readable on a phone. Do not create a bloated recap.
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10. Sales Process Diagnostic

```
Act as my sales process coach. Using my reusable sales context, CRM stages, recent
opportunities, emails, meetings, proposals, closed-won deals, and closed-lost deals, help
me map my real sales process and identify one improvement experiment.

Create:
1. A plain-English map of how deals actually move from first contact to successful client.
2. The difference between the official CRM process and what really happens.
3. The client commitments that show real progress at each stage.
4. The stages where deals most often stall, shrink, die, or become bad-fit opportunities.
5. The highest-leverage improvement I should test over the next 30 days.
6. The behavior I should change, the signal I should track, and the deals where I should
apply it first.

Do not give me a sales-operations overhaul. Give me one practical experiment that improves
the machine without pushing bad deals faster.
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11. Buying Process and Stakeholder Strategy

```
Act as my buying-process and stakeholder strategy coach. Help me understand how <client
company> is likely to buy <product/service>, who matters, and what I need to learn next.

Use my reusable AI sales context, CRM notes, emails, meeting transcripts, calendar history,
influence map, proposals, and relevant client documents. If evidence is thin, interview me
before concluding.

Create:
1. The likely buying steps from interest to signed agreement.
2. The likely post-signature steps required for the client to receive value.
3. The people or groups who may approve, review, fund, use, implement, influence, or block
the purchase.
4. Practical veto points, even if they are not formal decision makers.
5. Missing stakeholders and missing information.
6. Likely coaches, buyers, blockers, influencers, and possible heroes.
7. The proof, documents, references, demos, estimates, approvals, or planning materials the
client may need.
8. The places where the deal could stall because the client does not yet know how to buy
this type of solution.
9. The questions I should ask next to validate the path without sounding pushy.

Finish with a simple mutual buying checklist and one next stakeholder action.
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12. Value Wedge and Frame Shift

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Act as my competitive positioning coach. Help me build a value wedge and decide whether I
need to move the client’s evaluation frame.
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```
The client is <client company>. I sell <product/service>. The incumbent or main competitor
is <competitor/incumbent>, if known.

Using my reusable AI sales context, discovery notes, meeting transcripts, emails, influence
map, buying-process map, proposals, competitor materials, and client public signals,
create:

1. The outcomes, problems, risks, and priorities the client appears to care about.
2. The benefits we can credibly provide.
3. The benefits competitors can credibly claim.
4. The benefits everyone can claim and should not be treated as differentiation.
5. The three to five benefits the client cares about that only we can credibly prove.
6. The old frame the client may be using to evaluate the decision.
7. A better frame, if one is justified by client value and proof.
8. Three power messages that connect the client’s priorities to our differentiated
strengths.
9. Three questions that test whether the client is open to the new frame.
10. One permission-based opening I can use before a demo or presentation.

Do not recommend hype or artificial differentiation. Only suggest a new frame if it is
relevant, credible, and provable.
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13. Hero Test and Preparation

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This is a human-judgment prompt. AI can inspect notes and messages, but it cannot fully
read the room.

Act as my sales coach. Help me test whether one or two people I believe might be heroes
inside <client company> are actually heroes, coaches, buyers, influencers, blockers, or
unknowns.

Start with these people:

<person 1: name, title, role, and why I think they might be a hero>
<person 2: name, title, role, and why I think they might be a hero>

Use my reusable AI sales context, CRM notes, meeting transcripts, influence map, value
wedge, buying-process map, and follow-up history. Form a starting hypothesis from the
written record, then interview me one person at a time about what the record cannot show:
confidence, body language, room dynamics, responsiveness, political courage, and whether I
can imagine the person arguing for us in a client-only meeting.

After the interview, classify each person and help me prepare the strongest potential hero
with:
1. The three to five arguments they can use internally.
2. The proof points or references they need.
3. The objections and real or perceived risks they will face.
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4. The next conversation I should have with them.

Do not identify a hero from documents alone. Help me test my judgment.
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14. Late-Stage Risk and Close Plan

```
Act as a senior deal coach helping me reduce late-stage risk before close.

The client is <client company>. The opportunity is <opportunity name or description>.

Using my reusable AI sales context, CRM notes, emails, meeting transcripts, proposals,
pricing history, technical validation notes, buying-process map, influence map, value
wedge, and follow-up history, review the opportunity for anything that could scare the
kitten before close.

Look for:
1. Unvalidated technical, pricing, usage, scope, services, or implementation assumptions.
2. Stakeholders we have not met who could still object or veto.
3. Legal, procurement, security, compliance, finance, or implementation steps that may
appear late.
4. Competitor moves, late discounts, incumbent pressure, or best-and-final surprises.
5. Add-ons or upsells that could destabilize the main deal.
6. Happy ears, vague next steps, or weak evidence.

For each risk, explain why it matters and what I should do this week. Then create a short
close plan: what not to introduce, what assumptions to confirm, who to speak with next, and
whether to move forward, slow down, or requalify.
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15. Next Client-Facing Action

```
Act as a direct sales coach. Review one active opportunity and help me identify the next
concrete client-facing action I should take.

The client is <client company>. The opportunity is <opportunity name or description>.

Using my reusable AI sales context, CRM notes, recent emails, meeting transcripts, calendar
history, influence map, buying-process map, value wedge, and follow-up history, tell me:
1. The current state of the opportunity.
2. What I may be overthinking or delaying.
3. The most useful next client-facing action.
4. The risk of taking that action.
5. The risk of not taking that action.
6. The exact message, question, meeting request, or follow-up I should send next.

Do not give me a strategy memo. Give me one recommended action and the language to take it.
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16. Client Communication Coach

```
Act as my client communication coach. Using my reusable AI sales context and writing-style
guide, help me improve the message below without making it sound generic.

Message or draft:

<paste email, follow-up note, discovery question, meeting agenda, objection response, or
client-facing language>

Improve it for:
1. Clarity and brevity.
2. A clear call to action or next step.
3. Mobile readability.
4. Client-specific language and industry lingo.
5. Tone that sounds like me.
6. Trigger words or phrases that may create unnecessary friction.
7. Open-ended questions where yes/no questions would produce shallow answers.
8. Objection handling if the message is responding to pushback.

Show me the revised version, then briefly explain what changed and why. If the draft sounds
like generic AI, say so and fix it.
```

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17. Objection Reframing Practice

```
Act as my sales objection coach. I am going to paste common objections I hear from clients.

For each objection, create three natural responses:
1. A Feel, Felt, Found version.
2. An Acknowledge, Associate, Ask version.
3. A short “Yes, and what else?” follow-up version.

Make each response conversational, not scripted. The goal is not to win an argument. The
goal is to acknowledge the client, uncover the real concern, and keep the conversation
moving.

Here are the objections:

<paste objections>
```

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18. Team Engagement Plan

```
Act as a sales team strategist. Help me decide who from my company should be involved in a current sales opportunity, when they should be introduced, and what role each person should play.

The client is <client company>. The opportunity is <opportunity name or description>. Use my reusable AI sales context, CRM notes, meeting history, influence map, buying-process map, value wedge, upcoming meeting agenda, and prior client communications.

Create a team engagement plan that includes:
1. The current client stakeholders and what they likely care about.
2. The internal people from my company who could help: sales manager, sales engineer, executive, product specialist, professional services, legal, support, customer success, or others.
3. Who should be involved now.
4. Who should be saved for later.
5. Who should not attend the next meeting because they would add complexity, noise, or risk.
6. The specific lane each internal person should stay in.
7. The risk if I answer questions that should belong to someone else.
8. The risk if I bring too many people from my company into the meeting.

Then recommend:
1. The ideal attendee list for the next client meeting.
2. The role each person should play.
3. The prep note I should send my internal team before the meeting.
4. One scarce internal resource I should preserve for a later stage of the deal.

Do not recommend school bus selling. Keep the team lean, intentional, and matched to the client’s buying process.
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19. Personal Communication / DiSC-Style Analysis

```
Act as a sales communication coach familiar with DiSC-style communication patterns.

Using my reusable AI sales context and a sample of my recent emails, meeting transcripts, follow-up notes, and internal messages, create a provisional communication profile for me. Do not treat this as a clinical assessment or perfect personality test. Treat it as practical sales coaching.

Include:
1. My likely communication style and evidence.
2. Where my style helps in sales.
3. Where my style may create friction with different client personalities.
4. How I should adjust for direct, expressive, steady, or detail-oriented clients.
5. Three habits I should keep.
6. Three habits I should watch.

Do not box me into a label. Help me communicate more effectively.
```

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20. Vacation Handoff and Return

```
Act as my sales operations assistant and chief of staff. Help me prepare for vacation and
return without losing momentum.

My vacation starts on <vacation start date> and ends on <vacation end date>.

Before vacation, review my calendar, CRM records, task list, open opportunities, meeting
notes, and internal messages. Create a handoff plan with:
1. Client opportunities that may need attention while I am out.
2. Open commitments I should complete before I leave.
3. Items to delegate.
4. People who need to know I am out.
5. A client-safe out-of-office or handoff message.
6. A short return plan for my first day back.

When I return, help me separate true priorities from inbox noise. Create:
1. Urgent client issues.
2. Deals that changed while I was out.
3. Commitments I owe.
4. Follow-ups to send.
5. Items that can wait.

Do not help me pretend I was working while on vacation. Help me leave cleanly and return
clearly.
```

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21. Sensitive Pattern / Bad-Faith Risk Review

```
Act as a sales risk analyst and deal coach. Help me review a current sales opportunity for
observable patterns that may create deal risk.

Do not diagnose anyone psychologically. Focus only on behavior, written commitments,
changed requirements, missed deadlines, contradictions, and patterns in the sales process.

Review my available email threads, meeting notes, CRM records, call transcripts, proposals,
pricing discussions, and follow-up notes for <client company>.

Look for:
1. Requirements that changed after they appeared to be agreed.
2. Pricing, scope, or terms that were reopened repeatedly.
3. Commitments that were made and then ignored.
4. Unclear authority or hidden decision makers.
5. Repeated contradictions between what was said and what was done.
6. Behavior that could make the deal unfair, risky, or unprofitable.
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For each pattern, tell me:
1. What happened.
2. What evidence supports it.
3. What risk it creates.
4. What I should clarify in writing.
5. Whether I should continue, slow down, requalify, escalate internally, or walk away.

Stay factual. Do not label anyone. Protect the client, my company, and my own judgment.
```

Part 2: The Chapter Prompts

Every AI prompt from the printed book, in book order. These are the shorter chapter versions; Part 1 contains the fuller workflow templates. Copy either. Adapt both.

Understand Marketing

Product Adoption and Lifecycles

```
Act as my go-to-market strategist. I sell <product/service> and I want to understand where it sits on the adoption curve — innovator, early adopter, early majority, late majority, or laggard — and what that means for how I should sell it.
Using my reusable AI sales context, product materials, competitive landscape, and anything public about my market, place my offering on the curve and explain your reasoning.
Then tell me: what buyer titles and personality types should I target at this stage, what does my real competition look like (including “do nothing”), and what proof or risk reduction will this cohort demand before buying? If I sell multiple product lines at different stages, break it down by line.
If you don’t have enough information to place the product confidently, ask me questions until you do.
```

Understand Marketing and Your Market

```
Act as my marketing translator. I want to compare what my marketing department says with what my clients actually say in the field.
Using my reusable AI sales context, our public marketing materials, website, recent campaigns, and my own emails, call transcripts, and meeting notes, build me two lists: the phrases and claims marketing uses, and the phrases and problems my clients actually use when they talk about this space.
Show me where the two match, where they diverge, and where marketing’s claims force me to explain around the copy instead of building trust. Then suggest three pieces of field intelligence worth feeding back to marketing.
Be specific about the evidence. If you’re inferring rather than quoting, say so.
```

Ladders in the Mind

```
Act as my positioning analyst. I want to understand the mental ladders my clients use when they think about <product/service category>.
Using my reusable AI sales context plus public information about my market and competitors, map the ladders: what category names do buyers actually use, who occupies the top rungs of each, and where do we credibly sit?
```

```
Then find the opportunity: is there a more specific ladder — a niche, use case, industry, or buyer type — where we have a credible claim to the top rung? Give me two or three candidate ladders, the claim we could make on each, and the evidence that supports or undermines each claim.
Do not invent a ladder we can’t defend. A false claim to the top rung costs more than honest second place.
```

Know Your Product

```
Act as my product-readiness coach. I’m preparing for <client> and may need to explain, demonstrate, or defend <product/service> in a live meeting.
Using my reusable AI sales context, product materials, prior notes, and the meeting purpose, create a short prep brief with:
The client problems or use cases most likely to matter.
The three product capabilities I should understand cold.
The technical or implementation questions I am most likely to hear.
The places where I should bring in a sales engineer or specialist instead of answering alone.
One simple explanation I can use if the planned demo breaks.
Keep this practical. Help me know enough product to keep the meeting alive, not memorize the entire manual.
```

Understanding People

Read the Room

```
Help me build an influence map for <client>.
Using my reusable AI sales context, emails, calendar invites, CRM notes, meeting transcripts, and other interactions with people at <company domain>, identify every person who appears involved in the opportunity.
For each person, give me a starting profile: title, likely formal authority, apparent role in the deal, apparent attitude toward us, and evidence. Mark attitude as positive, neutral, negative, or unknown. If evidence is thin, say so.
Then interview me about each person one at a time. Ask what I have observed that may not appear in the written record: body language, confidence, tone, who others defer to, who seems skeptical, who shares internal context, and who might be a coach, hero, blocker, buyer, or influencer.
After the interview, create an influence map with:
Formal authority.
Informal influence.
Likely buying role.
Attitude toward us.
Access level.
Evidence and uncertainty.
Missing stakeholders.
Next relationship-building step.
Do not pretend the org chart is the truth. Help me understand how the room actually works.
```

AI for Sales Intelligence

```
Act as a senior sales intelligence analyst helping me prepare for a client conversation.
The client is <client>. I sell <product/service>. My upcoming meeting is with <names/titles/roles if known>, and the meeting purpose is <meeting purpose>.
Using my reusable AI sales context, plus available public and private sources such as filings, annual reports, earnings-call transcripts, investor presentations, press releases, executive interviews, websites, product pages, case studies, LinkedIn activity, hiring notices, job postings, employee-review themes, trade press, industry news, regulatory news, procurement/vendor/security pages, competitor messaging, CRM notes, email history, meeting notes, influence map, buying-process map, and value wedge, create a two-page sales intelligence brief with notes on where the findings come from.
Include:
The company’s stated strategy and priorities.
Major risks, pressures, or constraints.
Financial, operational, competitive, regulatory, talent, technology, security, or market signals that matter.
Words and phrases executives use to describe the company, its clients, markets, and risks.
Likely goals of different groups inside the company: executives, finance, operations, IT, security, legal/compliance, sales, marketing, HR, product, and individual contributors.
What each group may care about in relation to <product/service>.
Where priorities may conflict.
Likely buying triggers or reasons to act now.
Likely objections, blockers, or risk concerns.
What I should not assume based only on external signals.
Then give me five executive discovery questions, five manager questions, five individual-contributor or technical-evaluator questions, three value-wedge ideas, three business-outcome messages, three risks to prepare for, and a five-minute meeting-prep brief.
Do not write an investment report. Give me practical sales intelligence I can use to test hypotheses in the meeting.
```

Personality Types

```
Act as a psychologist experienced in the DiSC personality profile. I am a sales professional in <industry> selling <product/service>, and I want to understand my own profile.
Create my DiSC profile based on the attached 50 most recent email messages, taking into account whether each is from my work or personal email, and whether it is written to work colleagues, customers, or family members.
First, ask me 5 questions, one at a time, to enhance the profile.
<attach your 50 most recent emails>
```

The Staircase Technique

```
Act as my discovery coach. I am going to paste the questions I currently ask clients and the information I am trying to learn.
Organize the questions into a trust staircase from least sensitive to most sensitive. For each question, tell me whether it appears too early, too late, or in the right place. Rewrite any question that is closed-ended, leading, vague, or too abrupt. Add one gentle follow-up question for each step.
Keep the language natural. I want discovery questions I can actually say out loud.
```


5 Email Tips That Get Replies

```
Act as my email editor. Review the draft email below (or the ones I attach) against these tests: Is the subject line doing real work? Can the body be cut by half? Is there one clear call to action the reader can't miss? Does the whole thing fit on a phone screen without scrolling? Is the send time right for what this email needs to do?
Rewrite it. Show me the before and after, and explain each cut.
Then give me two subject lines: my champion (your best) and a challenger (a genuinely different approach worth testing). Do not give me two variations of the same idea — give me two different bets.
<paste email draft>
```

The Sales Process

Sales as a Process

```
Act as my process analyst. I want to see my real sales process — not the CRM labels, what actually happens.
Using my reusable AI sales context, CRM entries, emails, calendar, meeting notes, call transcripts, proposals, and follow-up history, reconstruct how my opportunities actually move from first contact to successful client. Use the stages my CRM system uses. Ask me questions to validate if these aren't clear.
Then find the constraint. Where do my deals most often stall, shrink, or die? Show me the evidence: which opportunities, which stage, what pattern. Distinguish between what my company says the process is and what the data says actually happens.
Map the terrain honestly. I'll decide what to fix — that part is my job, not yours.
```

Improve the Machine

```
Act as my sales process coach. Using my reusable sales context, CRM stages, recent opportunities, emails, meetings, proposals, closed-won deals, and closed-lost deals, help me map my real sales process and identify one improvement experiment.
Create:
A plain-English map of how deals actually move from first contact to successful client.
The difference between the official CRM process and what really happens.
The client commitments that show real progress at each stage.
The stages where deals most often stall, shrink, die, or become bad-fit opportunities.
The highest-leverage improvement I should test over the next 30 days.
The behavior I should change, the signal I should track, and the deals where I should apply it first.
Do not give me a sales-operations overhaul. Give me one practical experiment that improves the machine without pushing bad deals faster.
```

Teach Your Client How to Buy

```
Act as my buying-process coach. Help me understand how <client> is likely to buy <product/service>.
Use my reusable AI sales context, CRM notes, emails, meeting transcripts, calendar history, influence map, proposals, and relevant client documents. If evidence is thin, interview me before concluding.
Create a buying-process map that includes:
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The likely steps from interest to signed agreement.
The likely post-signature steps required for the client to receive value.
The people or groups who may approve, review, fund, use, implement, influence, or block the purchase.
The practical veto points, even if they are not formal decision makers.
The proof, documents, references, demos, estimates, approvals, or planning materials the client may need.
The places where the deal could stall because the client does not yet know how to buy this type of solution.
The questions I should ask next to validate the path without sounding pushy.
Finish with a simple mutual buying checklist I can review with the client.
```

Value Wedge

```
Act as my message strategist. Help me build a value wedge for use at my prospective client <client>.
Using my reusable AI sales context, my notes and emails about this pursuit, and public information about the client (annual report, strategy announcements, job postings) and my competitors, build three lists: the benefits this client cares about, the benefits my solution can credibly prove, and the benefits each competitor can credibly claim.
Then find the wedge: benefits that matter to the client, that we can prove, and that the competition cannot claim as strongly. Turn the wedge into three to five power messages — short, repeatable, provable.
Flag anything in the wedge that depends on an assumption I haven’t verified. Table stakes are not differentiation — don’t let them sneak into the power messages.
```

Moving the Window

```
Act as my competitive positioning coach. Help me build a value wedge and decide whether I need to move the client’s evaluation frame.
The client is <client>. I sell <product/service>. The incumbent or main competitor is <competitor/incumbent>, if known.
Using my reusable AI sales context, discovery notes, meeting transcripts, emails, influence map, buying-process map, proposals, competitor materials, and client public signals, create:
The outcomes, problems, risks, and priorities the client appears to care about.
The benefits we can credibly provide.
The benefits competitors can credibly claim.
The benefits everyone can claim and should not be treated as differentiation.
The three to five benefits the client cares about that only we can credibly prove.
The old frame the client may be using to evaluate the decision.
A better frame, if one is justified by client value and proof.
Three power messages that connect the client’s priorities to our differentiated strengths.
Three questions that test whether the client is open to the new frame.
One permission-based opening I can use before a demo or presentation.
Do not recommend hype or artificial differentiation. Only suggest a new frame if it is relevant, credible, and provable.
```

The Braveheart Speech

```
This is a human-judgment prompt. AI can inspect notes and messages, but it cannot fully read the room.
Act as my sales coach. Help me test whether one or two people I believe might be heroes inside <client> are actually heroes, coaches, buyers, influencers, blockers, or unknowns.
Start with these people:
<person 1: name, title, role, and why I think they might be a hero> <person 2: name, title, role, and why I think they might be a hero>
Use my reusable AI sales context, CRM notes, meeting transcripts, influence map, value wedge, buying-process map, and follow-up history. Form a starting hypothesis from the written record, then interview me one person at a time about what the record cannot show: confidence, body language, room dynamics, responsiveness, political courage, and whether I can imagine the person arguing for us in a client-only meeting.
After the interview, classify each person and help me prepare the strongest potential hero with:
The three to five arguments they can use internally.
The proof points or references they need.
The objections and real or perceived risks they will face.
The next conversation I should have with them.
Do not identify a hero from documents alone. Help me test my judgment.
```

Take Action

```
Act as a direct sales coach. Review one active opportunity and help me identify the next concrete client-facing action I should take.
The client is <client>. The opportunity is <opportunity name or description>.
Using my reusable AI sales context, CRM notes, recent emails, meeting transcripts, calendar history, influence map, buying-process map, value wedge, and follow-up history, tell me:
The current state of the opportunity.
What I may be overthinking or delaying.
The most useful next client-facing action.
The risk of taking that action.
The risk of not taking that action.
The exact message, question, meeting request, or follow-up I should send next.
Do not give me a strategy memo. Give me one recommended action and the language to take it.
```

Managing Risk to Close Deals

```
Act as a senior deal coach helping me reduce late-stage risk before close.
The client is <client>. The opportunity is <opportunity name or description>.
Using my reusable AI sales context, CRM notes, emails, meeting transcripts, proposals, pricing history, technical validation notes, buying-process map, influence map, value wedge, and follow-up history, review the opportunity for anything that could scare the kitten before close.
Look for:
Unvalidated technical, pricing, usage, scope, services, or implementation assumptions.
Stakeholders we have not met who could still object or veto.
Legal, procurement, security, compliance, finance, or implementation steps that may appear late.
Competitor moves, late discounts, incumbent pressure, or best-and-final surprises.
Add-ons or upsells that could destabilize the main deal.
Happy ears, vague next steps, or weak evidence.
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For each risk, explain why it matters and what I should do this week. Then create a short close plan: what not to introduce, what assumptions to confirm, who to speak with next, and whether to move forward, slow down, or requalify.
```

Pareto Principle – the 80/20 Rule

```
Act as my efficiency expert. Pareto’s law governs outcomes in many processes, including sales — not all activities are equal, and I want to find the vital few that drive most of my results.
Using my reusable AI sales context, emails, CRM entries, calendar, and any other available sources, analyze where my time actually goes and what it produces.
First, ask me 5 questions, one at a time, about my daily, weekly, and monthly routines.
Then give me your best assessment of which activities and tasks I should focus on to maximize my effectiveness as a sales professional — and which I should reduce, delegate, or drop. Be specific about the evidence behind each suggestion. If the data is thin, say so.
```

Sales Tactics

Meetings Plus 5

```
Act as my meeting analyst. I just finished a client meeting and I want to read the signals I may have missed.
Using the attached transcript or my meeting notes, plus my reusable AI sales context and prior interactions with these attendees, tell me: who engaged and who stayed quiet, who asked genuine questions versus polite ones, who stayed past the scheduled end, and what internal information surfaced that the formal agenda didn’t cover.
Then give me your honest read: who shows early signs of becoming a coach, and what evidence supports that? Mark each person’s apparent interest as strong, polite, skeptical-but-useful, or unknown.
Remember that staying late is a signal, not proof. If someone stayed because their boss stayed, say so. Suggest my next one-on-one move for the most promising candidate.
```

How to Prepare for a Meeting

```
Act as my sales meeting preparation coach. Help me prepare for an upcoming client meeting.
The client is <client>. The opportunity is <opportunity name or description>. The meeting is <date/time> and the purpose is <meeting purpose>.
Using my reusable AI sales context, calendar invite, attendee list, CRM notes, prior emails, meeting history, influence map, buying-process map, value wedge, prior follow-up, and open action items, create a practical prep brief with:
The client-facing objective.
My internal objective.
The three things we need to learn.
The three things the client needs to understand.
The power messages to reinforce.
Likely objections or risks.
Attendees and what each may care about.
Missing stakeholders or influence-map gaps.
Discovery questions to ask.
Materials, demo elements, proof points, or references to prepare.
The desired next step and fallback next step.
```

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Then draft a client-facing agenda and a short internal prep note for my team.
```

How to Run a Meeting

```
Act as my sales meeting and presentation coach. Help me turn an upcoming client
presentation or demo into a working session instead of a lecture.
The client is <client>. The meeting purpose is <meeting purpose>. Review my agenda, slide
outline or deck, demo plan, value wedge, buying-process map, influence map, and prior
client communications.
Identify:
Where the meeting is likely to become too one-way or slide-heavy.
Which slides or sections should be cut, combined, or moved to a leave-behind.
Where a live demo, whiteboard, discussion, or client-led sketch would be better than a
slide.
Where I should pause to ask for feedback, disagreement, confirmation, or questions.
Which quiet stakeholders I should intentionally invite into the conversation.
The objections or risks I should try to surface.
The next step I should land before the meeting ends.
Then create a simple run plan with the key sections, pause points, questions, and closing
language.
Do not help me create a smoother monologue. Help me create a better business conversation.
```

Immediately After the Meeting

```
Act as my post-meeting and follow-up assistant. Help me capture the meeting, update the
deal, and maintain cadence before details fade.
The client is <client>. The opportunity is <opportunity name or description>. The meeting
was <meeting date and purpose>.
Use my reusable AI sales context, transcript, notes, attendee list, CRM notes, pre-meeting
brief, influence map, buying-process map, action items, and relevant emails or chat
messages.
Create:
A short meeting summary.
Client commitments and our commitments, with owners and dates.
Decisions made, unresolved objections, and open questions.
What advanced, stalled, or created new risk.
Questions for me about human dynamics the transcript may have missed.
CRM notes I can paste into the opportunity.
Influence-map or buying-process updates.
A concise client follow-up email with clear next steps.
Any internal follow-up or executive sponsor update needed.
A cadence recommendation if the opportunity is in evaluation, proof of concept, legal,
procurement, or implementation planning.
Keep it readable on a phone. Do not create a bloated recap.
```

Follow-up and Cadence

```
Act as my follow-up assistant. I just finished a meeting with <client> and the sun is not
going down on these notes.
```

```
Using the attached transcript or my rough notes, plus my reusable AI sales context, draft the same-day follow-up email: brief recap, clear next steps with owners and dates, and anything I committed to sending. Write it so an executive can forward it to their team from a phone with minimal typing.

Then build the cadence plan for this opportunity: what gets sent, by whom, and when — same-day notes, weekly status updates, and the Friday-good-news / Sunday-unblock timing pattern for executive updates.

Flag any commitment I made in the meeting that isn’t in the draft. A missed commitment costs more than a late email.
```

Presentations and PowerPoint

```
Act as my presentation coach. Review the attached deck for a meeting with <client> where the goal is <goal>.

First, tell me whether PowerPoint is even the right tool for this meeting, or whether a whiteboard session, live demo, or plain conversation would do the job better.

If the deck survives that question, cut it. Target 50%. For every slide, ask: does it support a conversation, prove a point, or help the client make a decision? If it does none of those, it goes. Move any text-heavy slides into a leave-behind document instead.

Then help me find the story: what problem should the client see, what does the status quo cost them, and what better future am I helping them believe in?

Keep what earns its place. Kill what doesn’t. I’d rather present eight slides that work than thirty that don’t.
```

Go in Through Procurement

```
Act as my procurement strategist. I sell <product/service>, it’s a mature, well-understood category, and I believe I have a real cost advantage over <incumbent competitor>.

First, pressure-test that belief. Using my reusable AI sales context and public information, tell me honestly whether this category is commodity enough and my advantage real enough for a procurement-first approach — or whether I’d just be volunteering to be flattened into a spreadsheet.

If the approach holds, draft my procurement-facing pitch: the incumbent, my proof of comparable value, and the savings I can credibly claim. Then list what I need to learn from procurement — quantities, line items, renewal timing, the internal buying path, and which stakeholders should be at the first meeting.

Keep the savings claim conservative and defensible. One inflated number and procurement stops returning my calls.
```

Trigger Words

```
Act as my language editor. Review the attached email, script, or proposal for trigger words — language that increases perceived risk, sounds adversarial, or makes the relationship feel transactional.

Scan for words like contract, prospect, lead, customer, vendor, pitch, close, deal, lawyer, and “you guys” — and anything else that could set off the wrong association in my client’s mind. For each one, explain the trigger and suggest the lower-friction alternative: agreement, client, prospective client, team, conversation, next step, project, counsel.

Also flag the reverse: places where I should keep the heavier word on purpose, like reminding a late-paying client what the contract stipulates.

Show me the full rewrite, then the before-and-after list so I can learn the pattern, not just accept the edits.

<paste text to review>
```

Use Their Lingo

```
Act as my industry translator. I’m selling to <client> in <industry> and I want to speak
closer to the way they already think.
Using their website, job postings, executive interviews, annual report, my meeting
transcripts, and my reusable AI sales context, build me a working glossary: what they call
their customers (clients? guests? members? patients?), the words they use for their work,
their metrics, their problems, and their risks. Ten to twenty terms, each with a one-line
explanation of how it’s actually used.
Then flag the traps: terms I’m likely to use wrong, and my own sales vocabulary that will
mark me as a tourist.
Do not make me sound like I’m faking fluency. Where I should just ask the client to explain
a term instead of pretending, say so — plain English beats fake expertise.
```

Does That Make Sense?

```
Act as my sales discovery editor. Help me turn weak or closed-ended discovery questions
into questions that create useful answers.
Here are my current discovery questions and what I am trying to learn:
<paste questions and discovery goals>
For each question:
Identify whether it can be answered with yes or no.
Explain what kind of shallow or incomplete answer it may produce.
Rewrite it as an open-ended question using what, how, why, tell me about, or walk me
through.
Suggest one follow-up prompt if the client gives a short answer.
Suggest one softer version if the topic is sensitive.
Put the questions in a trust-building order from least sensitive to most sensitive.
Keep the language plainspoken and natural. I should be able to ask the improved question
out loud without sounding like I downloaded it from a sales training portal.
```

Reframing

```
Act as my sales objection coach. I am going to paste common objections I hear from clients.
For each objection, create three natural responses:
A Feel, Felt, Found version.
An Acknowledge, Associate, Ask version.
A short “Yes, and what else?” follow-up version.
Make each response conversational, not scripted. The goal is not to win an argument. The
goal is to acknowledge the client, uncover the real concern, and keep the conversation
moving.
Here are the objections:
<paste objections>
```

Negotiating

```
Act as my negotiation prep partner. <Person> at <client> is showing buying signals and I
want to be ready before the conversation starts.
```

```
First, help me build my Big List — every variable my company can adjust besides price: term, payment schedule, quantities, onboarding, training, support hours, warranty, certifications, references, joint marketing, executive access. Use my reusable AI sales context and ask me questions to fill the gaps.

Then help me prepare the Magic Wand conversation: my version of the question, and what I should listen for in the answer. When the client’s wish list arrives, help me map each ask against the Big List — what to trade, what to package, what to protect, and what to check internally before agreeing.

Remind me not to say yes too fast, even to a deal I know we can do. Instant agreement creates instant buyer’s remorse.
```

Pricing and Anchoring

```
Act as my pricing strategist for <opportunity> at <client>.

Using my reusable AI sales context, my emails, notes, and transcripts for this pursuit, find the anchors already in the deal: numbers or value frames from my competitor, the client’s budget, a prior vendor, procurement, or something I said too early. For each anchor, tell me where it came from and what assumptions are attached to it.

Then help me define the anchor I want: the value frame the client needs to understand before final pricing — business result, risk reduction, implementation confidence, or cost of the status quo. Give me the ground-beef-versus-rib-eye version of my comparison: what is the client actually comparing, and what do they not yet understand about the difference?

Finally, draft two or three “If we can show you X, would you be willing to do Y?” exchanges to anchor the next commitment, not just the price.
```

Make a Reason

```
Act as my outreach assistant. I have been avoiding reaching out to <client or prospective client> because I don’t have the perfect message. Help me make a real reason and go.

Using my reusable AI sales context, my calendar, recent client news, industry announcements, renewal dates, and anything else available, find genuine reasons to reach out this week: a trip, an event, a deadline, a new initiative they announced, a relevant client story, an executive visit, a milestone.

Rank the candidates by how true, relevant, and useful each one is to the client — not to me. Then draft the short message using “because.”

Do not invent a reason. A made-up reason might get one reply and will cost me the relationship. If nothing genuinely justifies the outreach right now, tell me that, and tell me what to watch for.
```