REPLY LIGHT

Day in the life of an account executive

As businesses look to their sales team to scale company growth, they must provide them with AI-powered solutions that connect with existing systems, eliminate tedious tasks, and empower them with the tools they need to succeed.

Contoso Coffee owns offices in countries across North and South America, Europe, and Asia with over 10,000 employees.

David is a Account Executive at Contoso Coffee. He manages a large pipeline of customers, so he needs to stay on-task to get through his to-do list and maintain strong customer relationships.

30% spend <30% of their time on non-sales activities[1]

Let's see how an AI-powered CRM eliminates inefficiencies throughout his day:

9:00 AM
David signs into the CRM and has the system generate a list of tasks, including email responses and meeting summaries based on the opportunity.

9:30 AM
David sees he has a new email from a prospect. He asks the system to generate a response using data collected from previous meetings, the prospect's activities, and third-party applications, like LinkedIn Sales Navigator.

11:00 AM
Later that day, David has a meeting with a prospect interested in buying Contoso Coffee. He uses the system to prepare a summary of the opportunity, including prospect details, past meeting notes, and emails. After reviewing the summary, he realizes there is a chance to increase the opportunity size and wants to connect with his manager, Sara, who works from home, to discuss how to approach today's conversation.

11:30 AM
Before meeting with Sara, David takes some time to do prospect using personalized, AI-generated content based on prospect activity and concerns.

12:30 PM
Using collaboration tools connected to the CRM, David creates a deal room with Sara using a pre-built template that includes all the opportunity details. He then has a virtual meeting with her to develop a strategy for the call.

2:00 PM
David presents what he discussed with Sara to the prospect. He can better focus on the meeting as the system records the meeting and writes a transcription highlighting competitor mentions and action items instead of manually taking notes.

2:45 PM
During the call, the prospect asks a question David doesn't know how to answer. The system generates a suggested answer, tips, and related information to address the prospect's concerns.

3:00 PM
After the meeting ends, the system gives David an analysis of the call. The information includes a customer sentiment analysis and KPIs like talk-to-listen ratio, talking speed, and switches in the conversation.

3:30 PM
David shares the meeting recap and analysis with Sara using the same deal room he created earlier to update her on how the opportunity progressed.

4:30 PM
A new lead replies from David's prospecting session earlier in the day. The system automatically adds details to the CRM and the company's communication systems.

Ready to make this a reality for your sales team?

REPLY LIGHT

Contact us now: light.us@reply.com

1. "How Much Time Do Your Salespeople Spend Selling?," The Center for Sales Strategy, 2021