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Original Paper

Artificial Intelligence and the Sales Process: How to Help Sales Students Develop an Analytics Skill Set

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Abstract

The following learning protocol provides an opportunity for professors to help students apply artificial intelligence and analytics in a pipeline management exercise. The activity allows advanced sales students to build a predictive sales model in Salesforce.com's Einstein Analytics Platform. The following innovation walks the educator through the process of accessing the platform, building a model and analyzing outcomes. The exercise provides the opportunity to improve outcomes and act on sales opportunities, simulating the work environment. The article provides teaching tips for success to help professors stay current in the digital age and prepare students for early career success.

Keywords

artificial intelligence, analytics, sales, sales process, teaching innovation

1. Introduction

The traditional selling landscape continues to evolve now with the integration of technology tools such as CRM, Analytics and Data Visualization. As analytics technology increasingly play a key role in today's selling process, sales educators need to incorporate topics such as analytics and Artificial Intelligence (AI) into the curriculum. With so much information available on these complex subjects and so little time to absorb it all, how do sales educators help tomorrow's sales leaders understand and connect with these ever-changing tools?

At the National Conference of Sales Management (2019), a teaching innovation was introduced which focused on the fundamentals of AI by integrating Salesforce's Trailhead in the sales classroom. The session provided an overview of AI and Salesforce Einstein Analytics. Given that students have a foundation of AI, this article provides a hands-on exercise to better understand how AI improves sales

professionals' ability to manage opportunities and predict win rates for potential customers.

The module consists of hands-on use of Salesforce.com Einstein Analytics Platform. The exercise can be conducted in one class period (recommended for Advanced Selling course). The module helps students understand the impact of analytics on the sales process and helps sales faculty implement a straightforward exercise to reinforce the importance of technology in today's selling environment.

The Need, Usefulness and Uniqueness of Sales Analytics

Analytics and Artificial Intelligence (AI) are among the top trends in data and analytics that have significant disruptive potential over the next three to five years, according to Gartner, Inc (2019). The sales literature adds, "the influence of sales digitalization technologies, which include digitization and artificial intelligence, is likely to be more significant and more far reaching than previous sales technologies" (Singh et al., 2018, p. 2). Analytics provides future sales professionals the ability to work smarter and more efficiently by discovering sales insights and predicting outcomes with the use of AI. Use of analytics and AI can help sales professionals better understand opportunities, generate qualified leads, and more efficiently convert sales. Today's students are no strangers to technology. The question is whether they are equipped to leverage these powerful tools in today's complex selling environment.

Teaching Objectives

The following teaching innovation illustrates how to implement an online resource that helps students develop their analytics skill set at no cost to the user or university. The Teaching Objectives for this Advanced Selling Topic are:

- a) *Build a machine learning/AI model in minutes*
- b) *Interpret AI modeling results*
- c) *Understand how AI impacts Sales*

This teaching innovation provides an easy, hands-on exercise for Advanced Selling Students to better understand analytics, AI, and its impact on the sales process.

2. Method

How to Use this exercise in an Advanced Selling Course

Salesforce.com Analytics platform, Einstein, is a set of AI technologies that provides sales professionals the ability to analyze data inside Salesforce. Einstein is used to automate reports, pinpoint workflow needs, and help end users predict sales outcomes. The module not only provides hands on use to Salesforce but also enables students to build a machine-learning module and to understand how AI impacts the sales process.

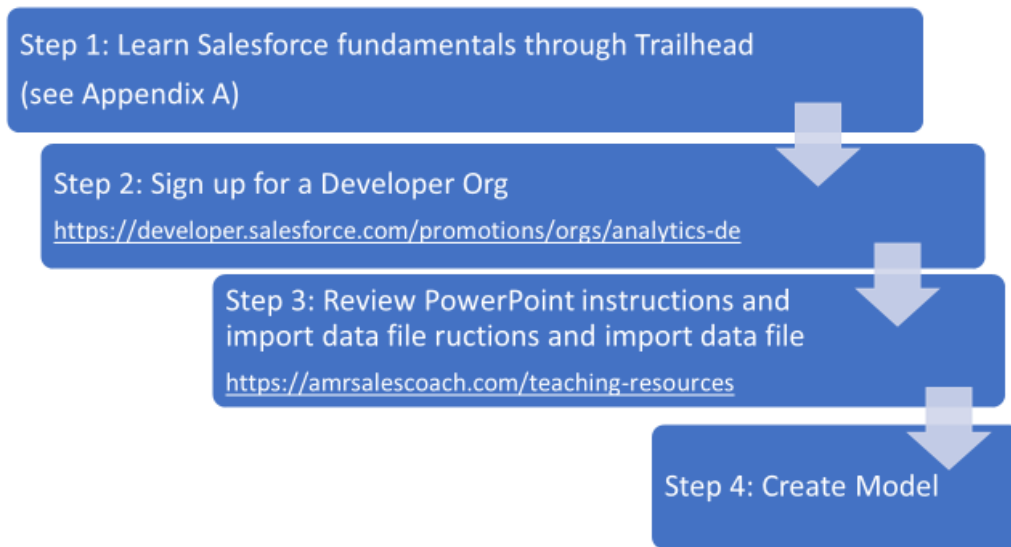


Figure 1. Analytics and AI for the Sales Classroom Flowchart

Instructions: How to implement the innovation

Step 1: Learn Salesforce Fundamentals Through Trailhead. Trailhead is a learning management system that is free of charge. Students can earn badges, points and status by reading and scoring well on tests to go from Scout (novice) to Ranger status (expert).

Salesforce is easy to use. Below are instructions to use AI Trailhead basic tools with assignments to get started:

To use Salesforce trails:

1. Go to <https://trailhead.salesforce.com/home>
2. Create account
3. Use links to go directly to trails OR search and create your own plan
4. Ask students to screen shot progress (completed modules/LinkedIn badges)

Table 1. Customized AI Tools on Trailhead

Topic	Module link	Goal of module
The Fourth Industrial Revolutions	https://trailhead.salesforce.com/content/learn/modules/learn-about-the-fourth-industrial-revolution?trail_id=learn-about-the-fourth-industrial-revolution	Learn about industrial revolutions and the basics of the Fourth Industrial Revolution
AI Basics	https://trailhead.salesforce.com/content/learn/modules/ai_basics?trail_id=get_smart_einstein	Learn what AI is and how it will transform CRM and the Customer Experience
Salesforce Einstein Basics	https://trailhead.salesforce.com/content/learn/modules/get_smart_einstein_feat?trail_id=get_smart_einstein	Discover insights and predict outcomes with this powerful set of AI-enhanced features.
Sales Cloud Einstein	https://trailhead.salesforce.com/content/learn/modules/ai_sales?trail_id=get_smart_einstein	Log your activities, target the right leads, and close more deals with AI for sales.

Step 2: Sign up for a Developer Org. This will give you access to salesforce in a test environment. It is important to use this type of environment because it allows all of the functionality of salesforce within a playground where nothing will break while students test all of the functionality.

Sign up here: <https://developer.salesforce.com/promotions/orgs/analytics-de>

Step 3: Review PowerPoint instructions and import data file

This practice data file has over 32,000 lines of data. Table 1 is a small snapshot of the data file. Full data file here: <https://amrsalescoach.com/teaching-resources>

Table 2. Snapshot of Practice Data File

Decision Maker Role	Product	Region	Close Date	Month	Competitor	Contract Type	Win
	Services				Codey		
CIO	Adoption CC	Argentina North	1/1/2018	January	Company	Renewal	Won
VP of Operations	Performance Management CC	New Zealand/Australia	4/1/2018	April	Astro Associates	New	Won
CIO	Performance Management	Colombia Bogota	7/1/2018	July	Astro Associates	Renewal	Lost
CEO	Services Design & Integration	Argentina North	1/1/2018	January	Einstein Labs	Renewal	Lost
CEO	Services Design & Integration	Argentina North	4/1/2018	April	Einstein Labs	Renewal	Lost
Regional VP	CPaaS Multimedia	US Southwest	7/1/2018	July	Einstein Labs	Renewal	Lost
Regional VP	Devices Multimedia	Canada West	10/1/2018	October	Einstein Labs	Renewal	Lost
Regional VP	Devices	Canada West	1/1/2018	January	Einstein Labs	Renewal	Lost
Regional VP	CC Mobile	Argentina Buenos Aires	10/1/2018	October	Astro Associates	Renewal	Lost
CIO	CC Mobile	Argentina Buenos Aires	1/1/2018	January	Astro Associates	Renewal	Lost
Regional VP	CPaaS	US Southeast	4/1/2018	April	Einstein Labs	Renewal	Won

Step 4: Create Model—In this step, the student will determine the outcome to predict by choosing the variables in the “Story Goal” module. For instance the user can select the story goal and choose the variable (i.e., win rate). The user then selects the insights and predictions to complete the analysis.

- a) Create Story
- b) Determine what outcome to predict: Variable=Win/Won
- c) Choose Insights and Predictions and Automated
- d) Confirm and Build Story
- e) Discuss Mode: What Happened?
- f) Go Deeper: Why It Happened?
- g) How can I improve the outcomes?

3. Conclusion and Implications

The modern-day selling organizations has adopted technologies such as CRM and analytics platforms and integrated these tools into their sales process. These powerful tools are improving sales productivity, increasing customer insights, and enhancing the experience for customers. With the evolution of today's buyer and the impact of "Big Data", tomorrow's sales professionals, students must develop their analytical skill set. This activity complements the traditional selling process and enhances our students' skills for today's Big Data marketplace.

Resources for Instructors

Help main link: <https://help.salesforce.com/articleView?id=bi.htm&type=0>

AI Trailhead for Students:

<https://trailhead.salesforce.com/users/mrodriguez10/trailmixes/smarter-sales-with-ai>

Academy videos: <https://www.youtube.com/channel/UCxUOdPtY50AUSH4wp-RQyVg>

Learning map: <http://www.einsteinanalyticslearningmap.com>

Success with EA: <http://pages.mail.salesforce.com/getting-started/analytics-cloud/>

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