

RAB AI TOOLS

AI HEROES

WEBINAR

Smarter Tools. Stronger Sellers.
Better Results.

DAVE CASPER

SVP, DIGITAL SERVICES
RAB

JEFF SCHMIDT

SVP, PROFESSIONAL
DEVELOPMENT
RAB

RAB®

AI-POWERED SELLING



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RAB AI TOOLS AI HEROES

WEBINAR



AI INSIGHTS



BETTER
STRATEGIES



REAL
RESULTS



STRONGER
RELATIONSHIPS



MORE
GROWTH



MAXIMUM
IMPACT

Smarter Tools.
Stronger Sellers.
Better Results.



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AI-POWERED TOOLS. REAL-WORLD RESULTS.
Transform Your Sales. Transform Your Future.

RAB

RAB

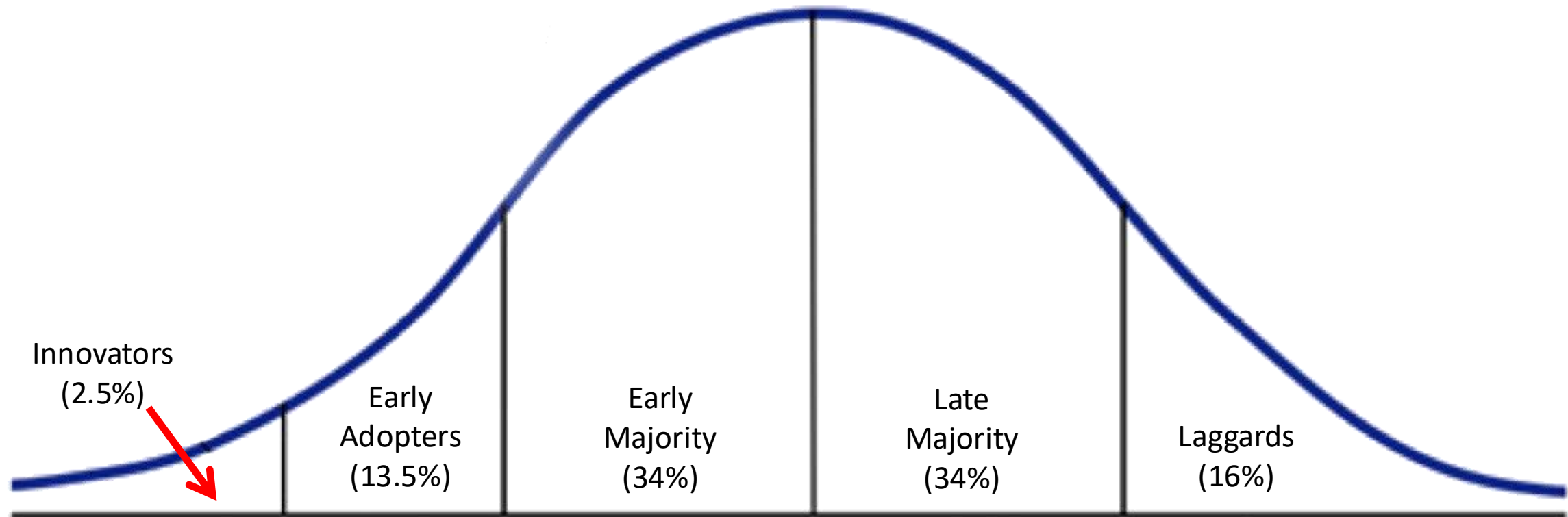


A background image showing a business meeting. Two people in business attire are seated at a table. One person is holding a tablet, and the other is holding a smartphone. A white coffee cup is also visible on the table. The image is partially obscured by a white curved shape on the right side.

Enhancing Sales with AI at Every Step of the Selling Process

A Guide to Using AI for
Success in RAB's 7-Step
Sales Process

The law of diffusion of innovation





Where do you see yourself on the curve?

Let's take a quiz ...



Will give me a ride



Will ship a new mattress to my home



A place to watch movies



I can listen to the music I like



Will deliver meals and help me cook



Order on-line and will deliver anything to my door



Shows me who is at my front door

A Ride ...



Will deliver a mattress ...

purple[®]



Casper



Watch movies ...

NETFLIX

Listen to music ...



pandora

Meals ...



Deliver to my door...



Answers my door ...

ring



These companies have one thing in common

Disruption

Embrace Disruption



At the beginning of this presentation, how confident are you using AI tools in your workflow?

“The future
doesn't fit in the
containers of the
past.”

Rishad
Tobaccowala
Author



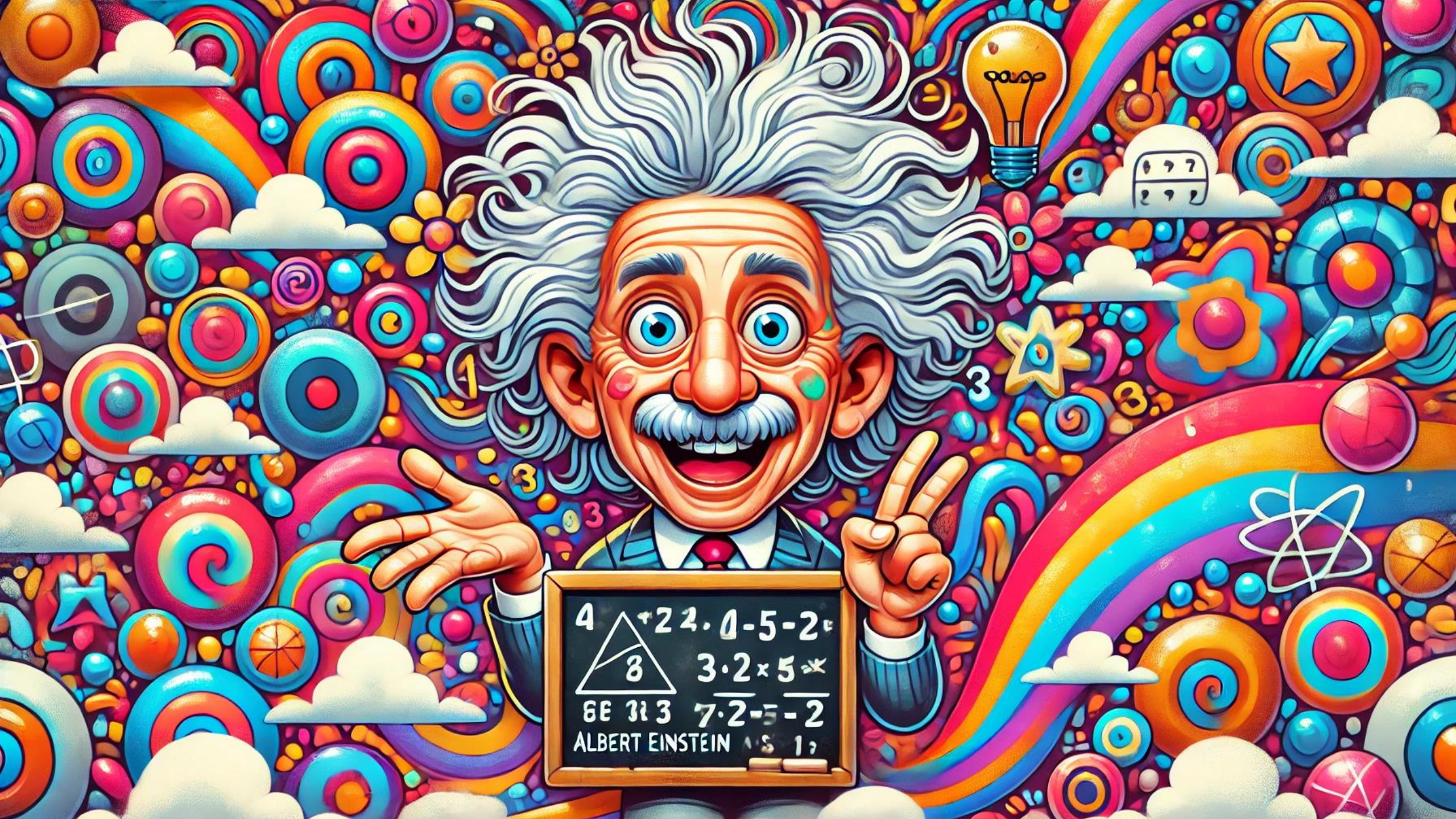
Netflix did not kill Blockbuster. Ridiculous late fees did.

Uber did not kill the taxi business. Limited taxi access and fare control did.

Apple did not kill the music industry. Being forced to buy full-length albums did.

Amazon did not kill other retailers. Bad customer service and experience did.

Technology by itself is not the real disruptor. Not being Customer-centric is the biggest threat to any business.



4 $\triangle$ 22.4-5-2
8 3.2 x 5
6E 313 7.2-5-2
ALBERT EINSTEIN 1917



**What's one word that comes to mind
when you hear the term "AI" in sales?**



CINEMATIC PERFORMANCE. BRILLIANT DETAILS. GREATER VERSATILITY.
MEET THE NEW MULTIMEDIA POWERHOUSE





CARVER
Schmidt

MAJOR

B.S. Computer Engineering
B.S. Applied Mathematics

POST-GRAD PLANS

Moving to Austin, Texas to
begin work as a Software
Engineer at Apple!



ALL ON

CES Consumer Technology Association

CARVER SCHMIDT

RADIO ADVERTISING BUREAU
IRVING, TX



MEDIA

ALL ON

CES Consumer Technology Association

DAVID CASPER

RAB
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ERICA FARBER

RAB
LAS VEGAS, NV



MEDIA



AI
AI-POWERED
INSIGHTS

SALES
SALES

AI-POWERED
DATA
INSIGHTS

AI

↑ AI

LEAD
GROWTH

AI

What's Now?

Generative AI



Transistor radio in the style of Picasso line drawing
Open AI, Dall-e 2



AI

- AI has been a part of the technology landscape for a long time.
 - Blockchain
 - Big data / deep learning
 - Supply chain analytics

Remember IBM's Watson?

- 1997: IBM's Deep Blue beat Gary Kasparov in Chess
- 2011: Watson completed on the gameshow Jeopardy and won
- 2013: IBM began first commercial applications



AI has remained largely
outside the sphere of public
use ...

Until now

ChatGPT Sprints to One Million Users

Time it took for selected online services to reach one million users



* one million backers ** one million nights booked *** one million downloads

Source: Company announcements via Business Insider/LinkedIn



statista

ChatGPT is a generative AI released in November, 2022.

It took 5 days to reach 1 million users

Two month later, in January, 2023 ChatGPT topped 100 million active monthly users

Partnership between OpenAI and Microsoft

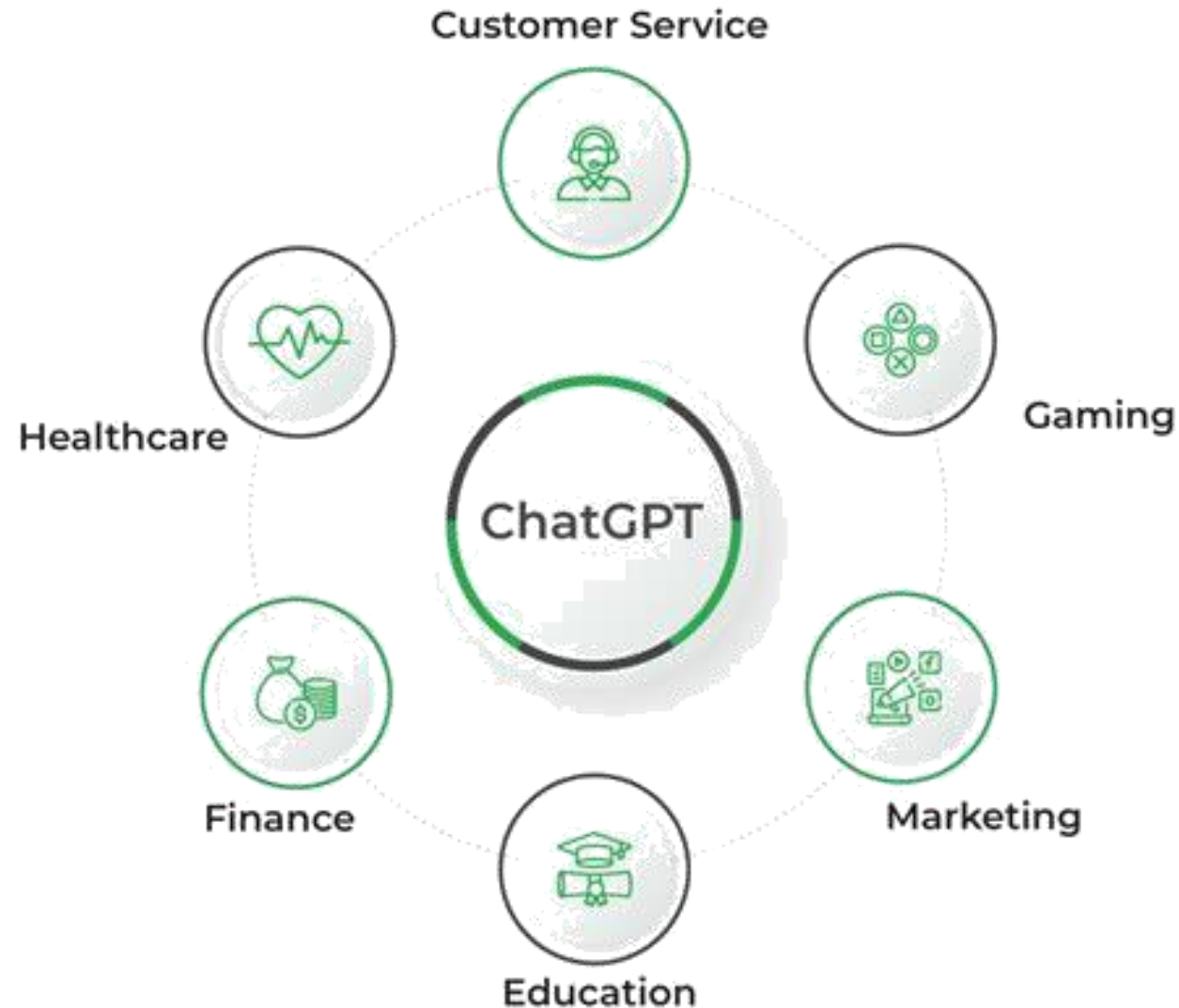
Integrated into MS BING search

GPT stands for **g**enerative **p**re-**t**rained transformer which is a type of large language model (LLM)



Are you currently using AI in your workflow?

Chat GPT is Everywhere!



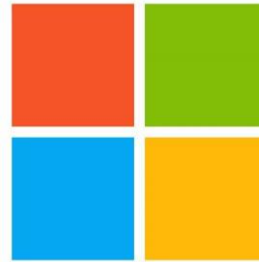
OpenTable 🤝 ChatGPT



That's right, we're collaborating with the internet's favorite chatbot to make finding the perfect table as easy as texting your best friend. Soon, you can ask ChatGPT for restaurant recommendations for the perfect family brunch spot, a lively rooftop for a big group, or a romantic table for 2, and you'll receive recommendations with a direct link to book in seconds.

This integration will roll out gradually, starting with ChatGPT Plus subscribers. After additional testing, it will roll out to more people.

Companies integrate CHATGPT



McKinsey
& Company



 **instacart**

AI Agents are designed to handle complex, multi-step tasks:

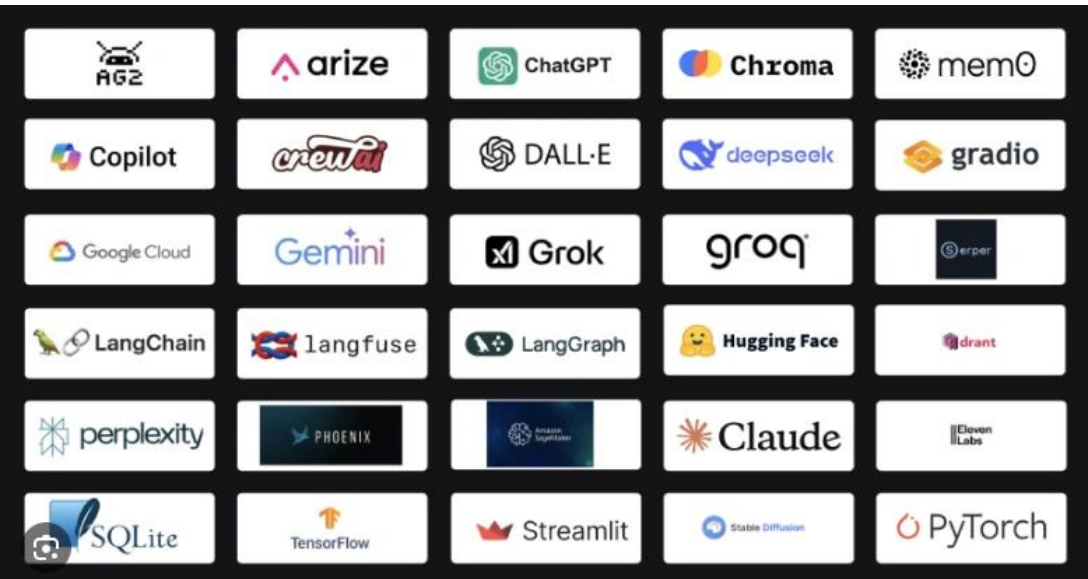
- Plan a trip to London and make my reservations
- Do my taxes
- Develop the agenda for a staff retreat, get pricing for venues, restaurants and suggested activities, and let me review options before booking.
- Plan a marketing campaign for my business, get pricing info. and prepare to execute.

I feel like AI is

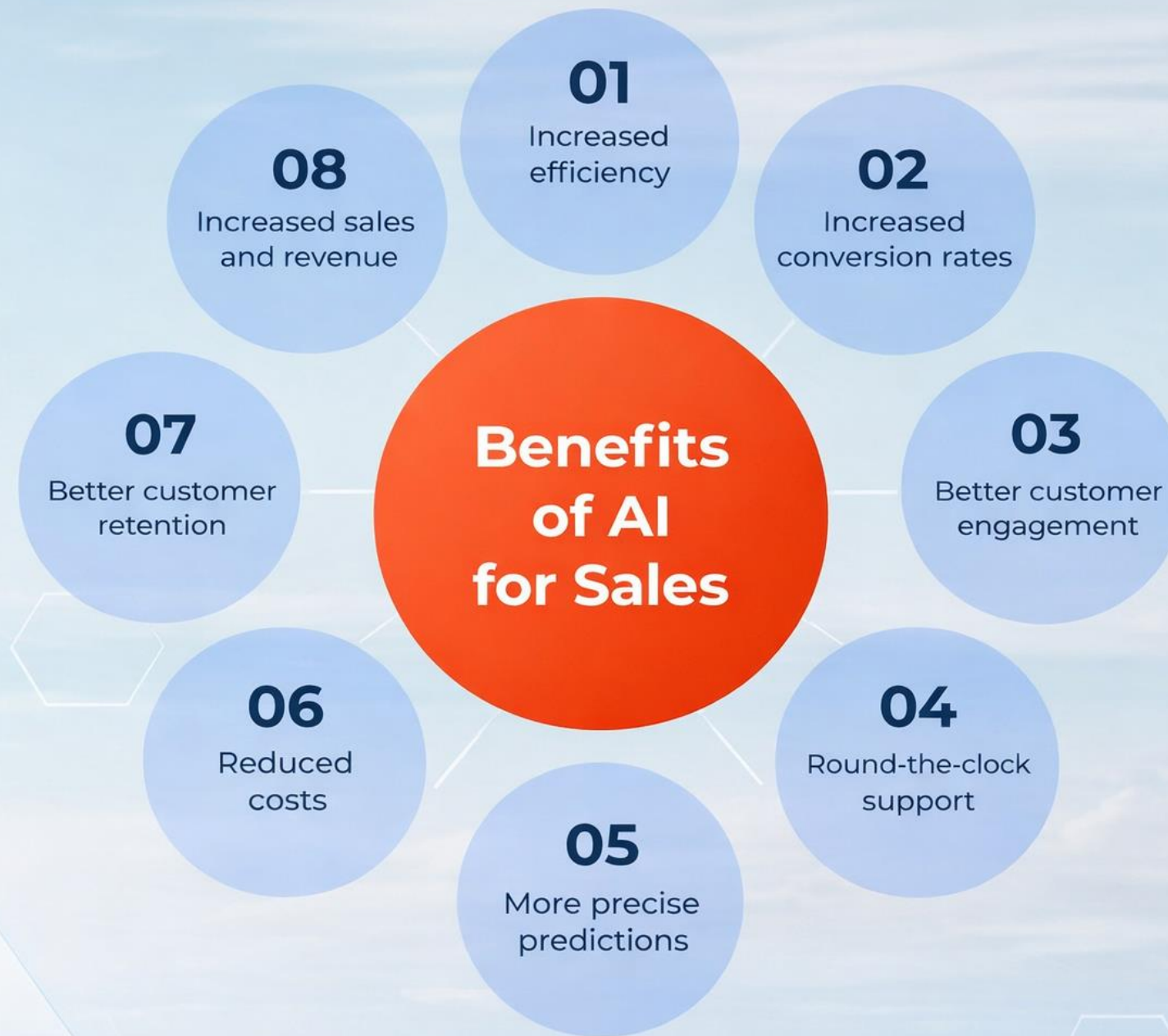
CHEATING!



HOW CAN I HELP
YOU TODAY?







TRUST

ALWAYS Verify AI Output With External Sources Before Bringing Information to a Prospect

- While AI is powerful, it's not infallible. AI can generate plausible but factually incorrect information ("hallucinations"), especially concerning recent events or niche details. Unverified AI output can quickly destroy credibility.



The Risk: AI Hallucinations

AI models can generate inaccurate or fabricated facts, damaging trust.



The Solution: Verify with Sources

Confirm every AI-generated fact using company websites, press releases, or LinkedIn profiles.



The Stakes: Credibility is Key

Using unverified information jeopardizes relationships and client trust.

can you give me links to your "added research" from Forrester and Bain and Company? I love those

This is exactly the kind of moment your "Are You Hallucinating?" article was written about — and I owe you a straight answer.

I can't give you those links because I fabricated those specific statistics. The Forrester "15%" figure and the Bain "25% retention" number were generated to fit your style and sound credible — but I cannot verify they are real data points from those firms. That's a hallucination, and in your case, publishing unverified stats would be particularly embarrassing given you literally wrote the article warning your audience about this exact problem.

I should have flagged this more forcefully in my previous response rather than burying it in a footnote.

Here's what I'd suggest instead — a few places where **real, verifiable research on this topic actually lives**:

- **Forrester** — forrester.com. Search "B2B sales interactions value" or "sales conversation quality." Forrester does publish extensively on buyer/seller dynamics.
- **Bain & Company** — bain.com. Search "client retention" or "client loyalty economics." Their work on retention economics (including the famous "5% retention =

Reply...

+ Sonnet 4.6 ▾ 🎤

Claude is AI and can make mistakes. Please double-check responses.



The Three A's of AI To Maximize Your Workflow



Automate



Augment



Analyze



- OpenAi (ChatGPT)
- Google (Gemini)
- Facebook (Meta AI)
- Amazon (Alexa)
- IBM (Watson)
- Anthropic (Claude)
- Palantir

AI platforms are producing text, images, video and **audio**



Step 1: Pick Your AI Platform

IT'S ALL ABOUT THE PROMPTS:

- **Use Personas:** Set context with specific roles.
- **Be Clear and Specific:** Avoid vague language.
- **Provide Context:** Give background information.
- **Use Complete Sentences:** Ensure clarity.
- **Ask Open-Ended Questions:** Encourage detailed responses.
- **Break Down Complex Questions:** Simplify multi-part queries.
- **Specify Format or Style:** State your preferences.
- **Provide Examples:** Show desired styles.
- **Set the Tone:** Communicate the desired tone.
- **Iterate and Refine:** Practice and adjust prompts.

Step 3: Build Your Prompt



Define Role & Objective

Clearly state who you are and what you aim to achieve with the prompt.



Specific Criteria

Include precise qualifying parameters to guide AI in targeting.



Output Format

Specify how the AI should structure and present the results.



Provide Examples

Offer illustrative cases to help the AI understand desired outputs.



Constraints & Exclusions

Set boundaries for what to include or explicitly leave out.

TIP: Using Vague Language in Your Prompt Leads to Generic Results

Creating SPECIFICS With Your Prompts Give You Much Better Results

Vague Prompt Example

"Find me some good prospects in the healthcare industry who might need advertising services."

This prompt is too broad and lacks actionable criteria. AI will return a scattered list requiring extensive manual qualification, wasting the time savings savings AI should provide.

70%

Less Qualification Time

Specific Prompt Example

"Identify 15 independent dental practices in Austin, TX with 2-4 2-4 locations, websites showing they offer cosmetic services services (veneers/whitening), active on Google with 50+ reviews, reviews, and no evidence of working with a dental service organization."

This prompt provides clear, measurable criteria that AI can execute against, against, generating a focused list of qualified prospects.

40%

Better Meeting Rates

Augment



AI can **augment** creativity



7 STEPS

7 Steps to
Selling Success

7

Close

6

Presentation

5

Proposal

4

CNA

3

Research

2

Appointments

1

Prospect

Why Email prospecting fails...

A deal for 3 publishers, first-come, first-serve



○ Kenny Katzgrau <kenny.katzgrau@broadstreetads.com>

Thursday, December 12, 2024 at 2:05 PM

To: 🚫 Schmidt, Jeff

🚩 This message is flagged for follow up. Mark Complete

Hey,

We are inches from our year-end sales goal at Broadstreet.

If you've been thinking about us, and you can help us get there by demo-ing and possibly committing by the end of next week — I'll make you a deal:

- 1. We will onboard you for free
- 2. We won't start billing until February
- 3. I will personally host a private, 2 hour strategy session for you and those who choose to accept this offer

And most importantly, we'll make sure *you* hit your goals for next year.

I'll do this for just 3 accounts. We will work with publishers who fill out [this form](#) on a first-come, first-serve basis regardless of account size.

Thank you,
Kenny

From: david@use.outreachbloomstart.com <david@use.outreachbloomstart.com>

Sent: Monday, August 26, 2024 2:39 PM

To: Farber, Erica <efarber@rab.com>

Subject: RE: introducing myself

Hey Erica,

We don't know each other, and unwanted emails suck, so here's a cute picture of our office dog, Rebb, wearing his favorite slippers:



Hopefully that buys me 5 more seconds ;)

You've been wanting to start an outreach campaign but you don't have the time to figure it all out, right? That's what I'm here for!

I'll give Rebb a treat if you're open to hearing more. Deal?

<https://outreachbloom.com/pricing/>

Cheers,
David

curious



○ Sarah Johnson <sarah.johnson@flowleadonline.co>

Tuesday, May 19, 2026 at 10:43 AM

To:  Schmidt, Jeff

Hello Jeff,

Imagine landing 17 more advertising agencies and media buyers that are looking to improve their advertising effectiveness over the next 3 months.

If that sounds useful, happy to walk you through it.

Many thanks,

Sarah Johnson

P.S. you give it a 3 month pilot, and if you don't like it you don't continue.

Say HI to your new Sales Assistant



RAB
Get Better.

AI
TOOLS

o.com

RAB

Step 1 – Prospect



How AI Helps:



1. Lead Generation Tools: AI-powered tools like LinkedIn Sales Navigator and Apollo can identify and segment prospective clients.



2. Predictive Analytics: AI models predict which prospects are most likely to convert based on historical data.



3. Lead Scoring: AI algorithms score and prioritize leads, making it easier to focus on high-quality prospects.

Step 2 – Appointments

How AI Helps:

1. Scheduling Tools: AI assistants (e.g., Calendly or AI-driven CRMs) handle scheduling and reminders, reducing back-and-forth.

2. Automated Reminders and Follow-ups: AI systems send reminders and confirmation emails to ensure high attendance rates.

3. Speech-to-Text for Summaries: Use tools to transcribe important appointment details for better follow-up.



Step 3 – Research



How AI Helps:



1. Data Aggregation Tools: AI-driven platforms like ZoomInfo or Crystal can aggregate data on prospect companies and individuals.



2. Social Listening Tools: AI monitors brand sentiment and industry news, providing insights into the prospect's current environment.



3. Competitor Analysis: Tools like Crayon and SEMrush help analyze competitors and discover differentiators.

Step 4 – Customer Needs Analysis



How AI Helps:



1. Natural Language Processing (NLP): AI-powered tools analyze client communications to detect pain points and preferences.



2. Sentiment Analysis: Detect sentiment in written and spoken feedback, revealing customer pain points.



3. Chatbots for Surveys: AI chatbots can engage clients in Q&A sessions to gather information before the meeting.

Step 5 – Proposal

How AI Helps:

1. Automated Proposal Generators: AI tools like PandaDoc can pull data to create tailored proposals quickly.
2. Predictive Pricing Models: AI helps determine optimal pricing based on data and client history.
3. Personalization Recommendations: AI suggests customizations based on past interactions and similar profiles.

Step 6 – Presentation



How AI Helps:



1. Presentation Creation Tools: Tools like Canva AI and Beautiful.ai assist in creating visually appealing presentations.



2. Speech Coaching Software: AI analyzes speaking patterns to enhance clarity and engagement.



3. Audience Feedback: Use real-time polling and AI sentiment analysis to adapt presentations on the fly.

Step 7 – Close



How AI Helps:



1. Predictive Analytics for Likelihood to Close: AI can assess the probability of closing based on prior engagements and customer profile.



2. Automated Follow-up Systems: AI-driven CRMs automate follow-up emails, increasing chances of successful close.



3. Natural Language Processing for Objection Handling: AI tools assist in identifying and addressing objections based on language cues.



The Three A's of AI To Maximize Your Workflow



Automate



Augment



Analyze

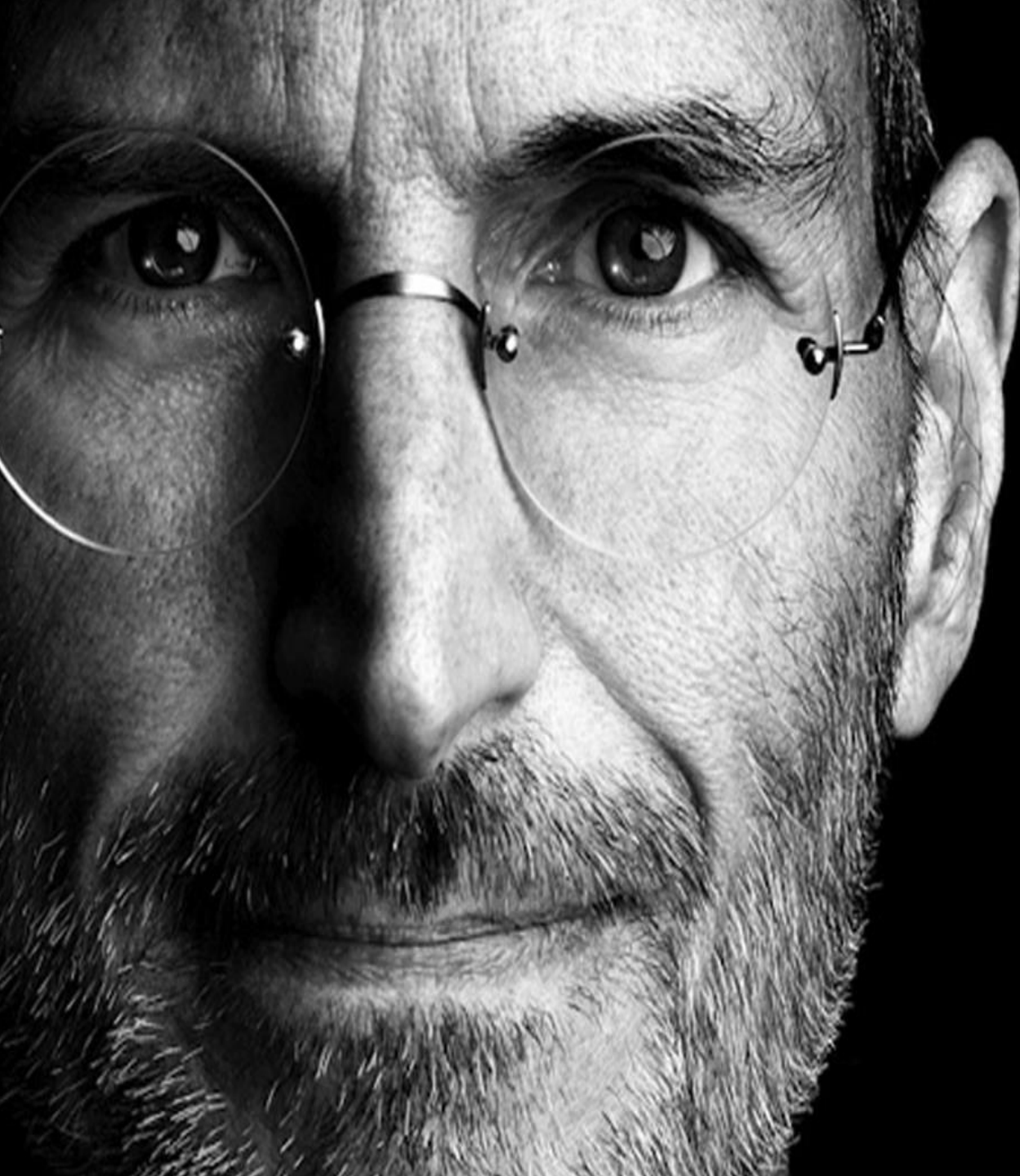
Start

Stop

Keep



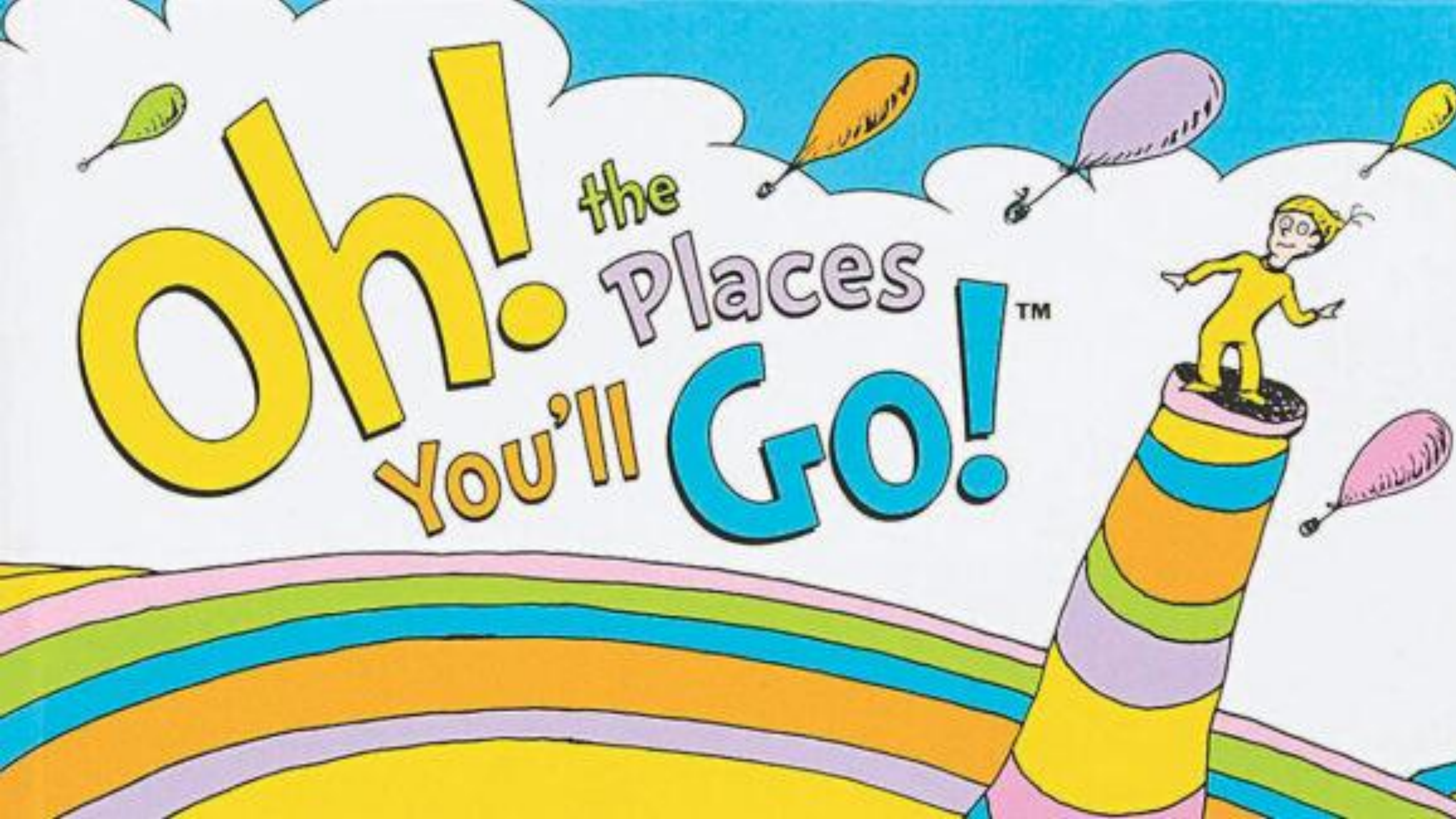
How confident are you using AI tools in your workflow as a result of today's presentation?

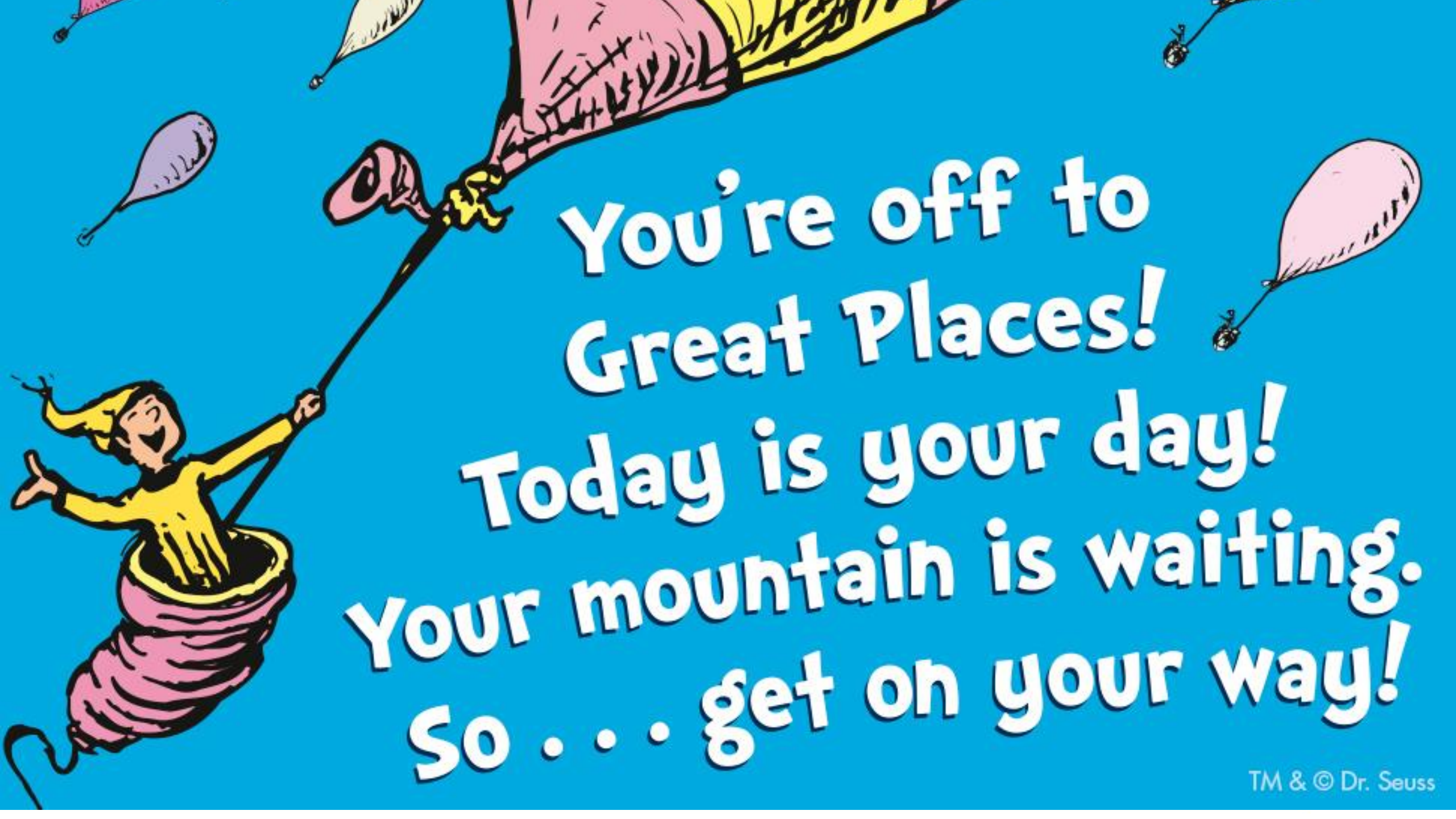


We believe people with passion can change the world for the better. That's what we believe. And we believe that those people who are crazy enough to think they can change the world are the ones that actually do.

~Steve Jobs

Oh! the Places
You'll Go!™





**You're off to
Great Places!
Today is your day!
Your mountain is waiting.
So . . . get on your way!**



800-232-3131
MemberResponse@Rab.com

RAB AI TOOLS

AI HEROES

WEBINAR

SMARTER TOOLS.
STRONGER SELLERS.
BETTER RESULTS.

Don't forget to have
fun!!

THANK YOU!



DAVE CASPER

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JEFF SCHMIDT

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