



Prospecting in 2026

“It’s Impossible to Get Meetings.” Or Is It? (Part 1)

- *“Prospects won’t respond.”*
- *“No one picks up the phone.”*
- *“No one responds to my emails.”*
- *“It’s impossible to get on their calendar.”*

AI is to sales prospecting today as the search engine was to research 25 years ago

The infographic features a central blue circle with the text 'Benefits of AI in Sales and Marketing'. Surrounding this central circle are six smaller, colored circles, each containing a specific benefit: 'Task Automation' (teal), 'Sales Personalization' (green), 'Faster Conversions' (light blue), 'Customer Insights' (pink), 'Faster Go-to-Market' (magenta), and 'Competitive Advantage' (red). The background is dark gray with a faint circuit board pattern.

Benefits of AI in Sales and Marketing

Task
Automation

Sales
Personalization

Faster
Conversions

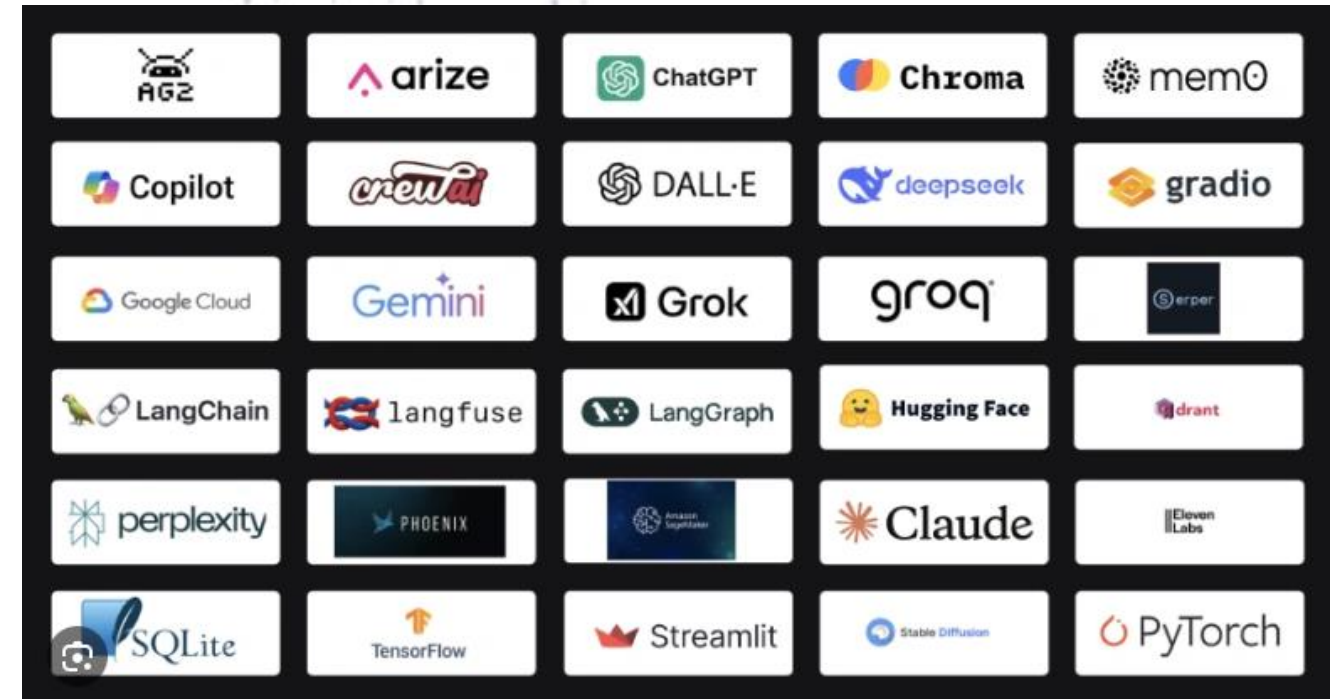
Customer
Insights

Faster
Go-to-Market

Competitive
Advantage



HOW CAN I HELP YOU TODAY?



**Benefits
of AI
for Sales**

01
Increased
efficiency

02
Increased
conversion rates

03
Better customer
engagement

04
Round-the-clock
support

05
More precise
predictive

06
Reduced
costs

07
Better customer
retention

08
Increased sales
and revenue

Agenda

- A Few Stats to Show The impact of AI
- What Your Clients Are Thinking and Saying About AI
- Understanding and Dealing With The B2B Customer Journey
- **Using AI for Prospecting**
- Developing out a proper CNA Based on Asking Business Questions
- Trust but Verify
- The 3 steps You Should Take to Using AI Effectively
- Live Demo





What is one word that comes to mind when you hear “AI in Sales”?



Are you currently using an AI platform for prospecting?

The Sales Numbers Game

200-300

Emails Weekly

Personalized outreach

50+

**Accounts to
Research**

New prospects daily

Dozens

Active Prospects

To manage
simultaneously

50%

**Annual
Sales/Burnout Rate**

The human cost of high
volume



What Clients Actually Want

Jeff Schmidt - February 9, 2026-

Forget showcasing our tools. Our job is to translate their power into undeniable business outcomes:



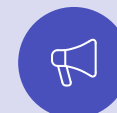
More Traffic



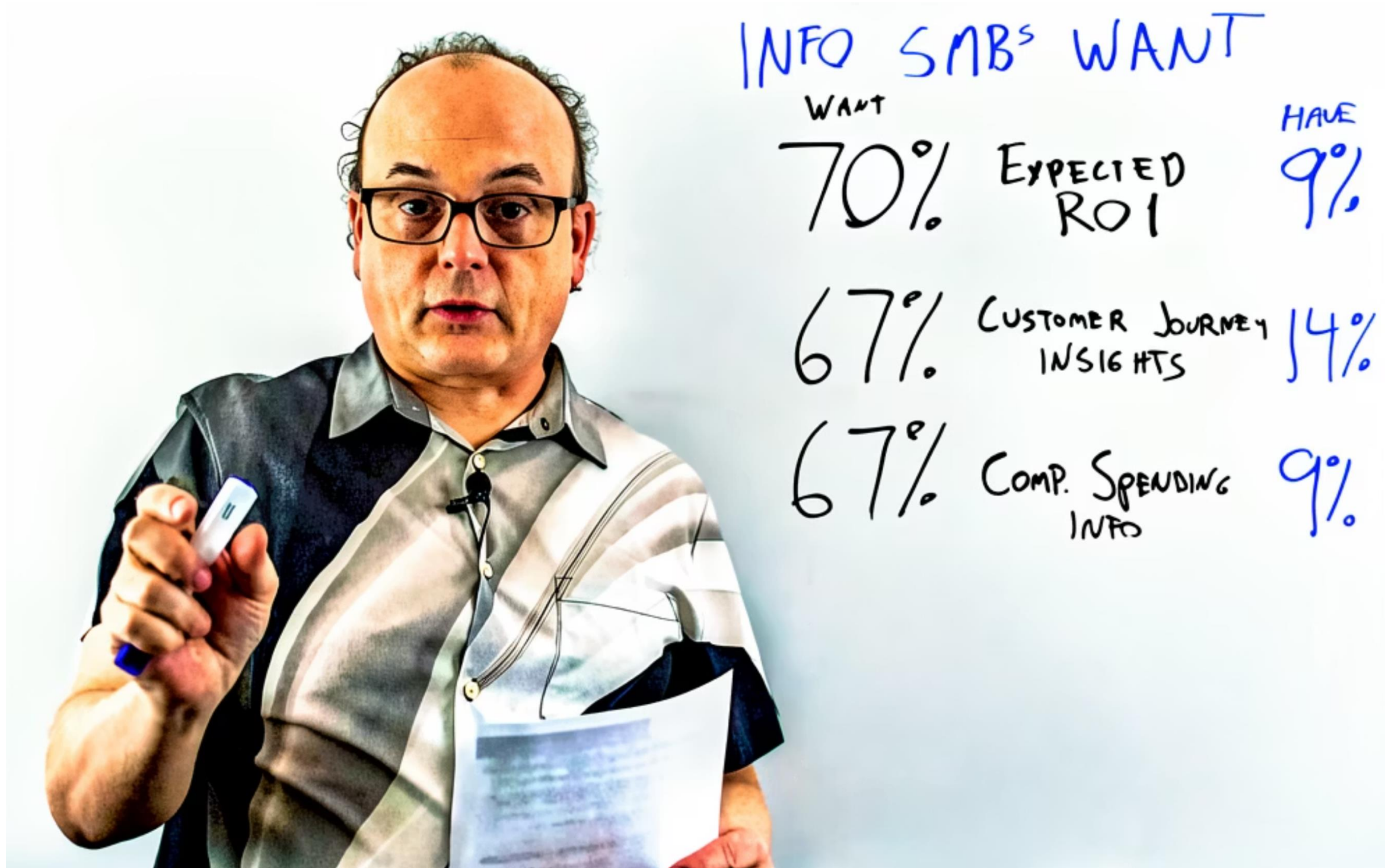
More Qualified Leads



More Awareness



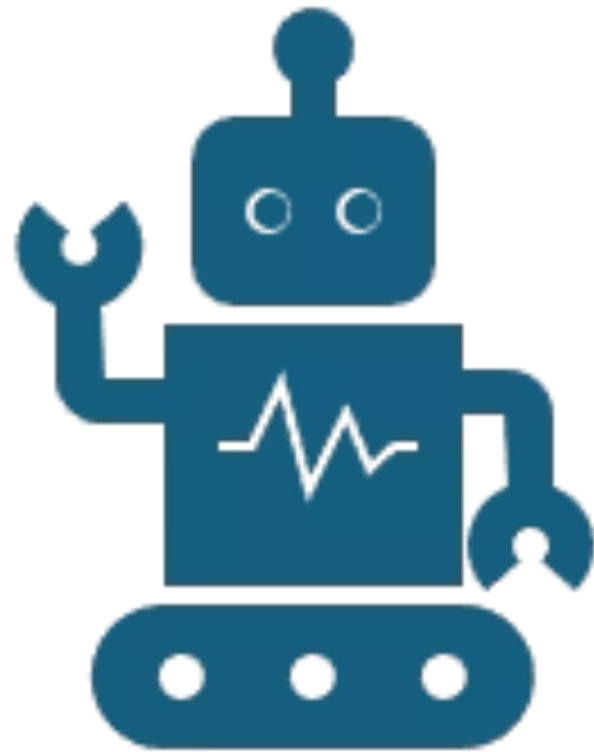
More SALES

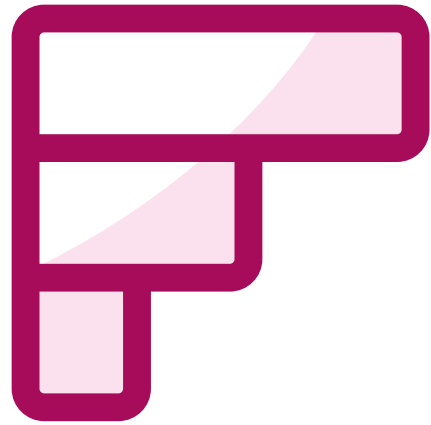


INFO SMB'S WANT

WANT		HAVE
70%	EXPECTED ROI	9%
67%	CUSTOMER JOURNEY INSIGHTS	14%
67%	COMP. SPENDING INFO	9%

Why Use AI For Prospecting?





Which AI benefits do you find most compelling for prospecting? Please rank.

The Modern Buyer's Journey

Speaking in THEIR vernacular, not yours!



Questions You Need To Answer In The Discovery Phase (This shows you have some understanding of how their business works)



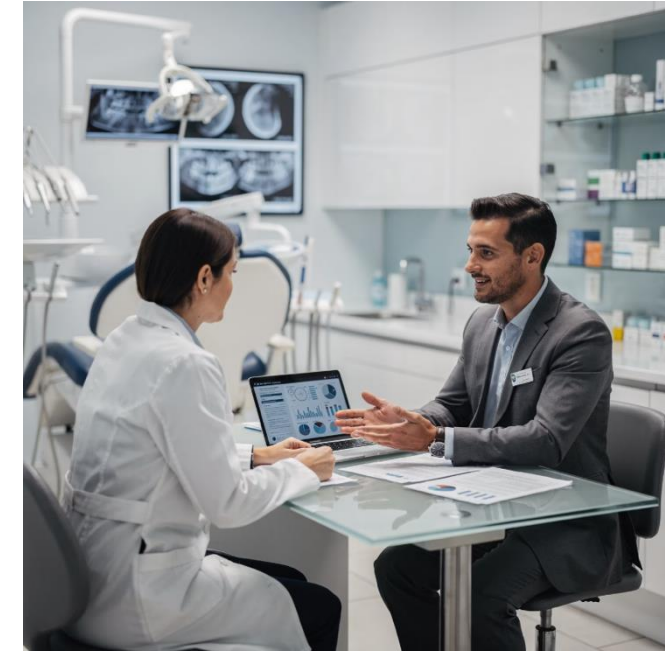
Questions To Ask

- What are the measurable outcomes for growth?
- How are they currently generating & tracking leads?
- How Many leads are they generating per month?
- In a perfect world how many leads would they like per month?



Questions To Ask

- What is their lead conversion rate?
- What is their close rate on qualified leads?
- What is their average transaction or lifetime value of a new lead?
- What percentage of the total sale is profit?



Leading Questions For Dentists

- Patient acquisition costs for dental practices typically range from \$150 to \$500 per new patient [Incept HealthDentplicity](#), Is your CAC in the low or high range of that?
- The average new patient is worth twice the value of an existing patient. What is your strategy for growing your new patient list?

The Productivity Multiplier



Automate Repetitive Tasks

AI handles prospect research and outreach drafts.



Build Strong Relationships

Humans focus on complex sales and closing deals.



Accelerate Rep Onboarding

New members ramp up faster with AI guidance.



Focus on High-Value Leads

Concentrate efforts on high-probability opportunities.





How confident do you feel about using AI tools for prospecting after this presentation?

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.



Prospecting & Client Outreach

The Steps to Becoming AI Proficient for Sales Prospecting



Claude



Step 1: Pick Your AI Platform

Step 2: Pick a Category You Want to Prospect



Start Broad, Then Refine

Avoid vague requests like "good prospects." Begin with a general idea of your ideal customer.



Apply Qualifying Criteria

Filter your broad target using precise characteristics:

- **Industry:** e.g., Healthcare
- **Company Size:** e.g., Small to Medium
- **Location:** e.g., North America
- **Growth Stage:** e.g., Expanding
- **Tech Stack:** e.g., Salesforce user
- **Challenges:** e.g., High churn rates



Achieve Hyper-Specificity

Combine criteria for a highly targeted profile. This enables AI to deliver high-potential prospects, reducing manual qualification.

Example: "Multi-location dental practices in growing suburban markets with 3-10 locations."

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.



"Who Am I Going To Call?"

1

You're my AI Prospecting Assistant

Your job is to help us find independent SMBs (no chains or franchises) that likely have \$5K-\$10K/month advertising budgets.

2

For general businesses in Charleston, SC DMA do the following:

- Identify 10 independent businesses that match, using this logic:
 - Located in or near an affluent or growing market
 - Offer premium or specialized services (e.g., cosmetic dentistry, med spa, niche education)
- Have a professional-looking website (modern, mobile-friendly, clear messaging)
- Appear active in the market (Google reviews, recent updates, or community engagement)

Are not part of a chain, franchise, or DSO

3

For each business, return:

- Business Name
- Website
- Contact Name & Title (owner/marketing decision-maker if available)
- Email
- Phone
- Location
- 2-3 sentence summary of visible marketing gaps or missed opportunities (e.g., no SEO, outdated site, no lead capture, weak branding)

Return everything in a clean table format.
Only include businesses that appear to fit the \$5K-\$10K/month ad budget profile based on the criteria above.

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 AI should provide.

70%

Less Qualification Time

❏ Specific Prompt Example

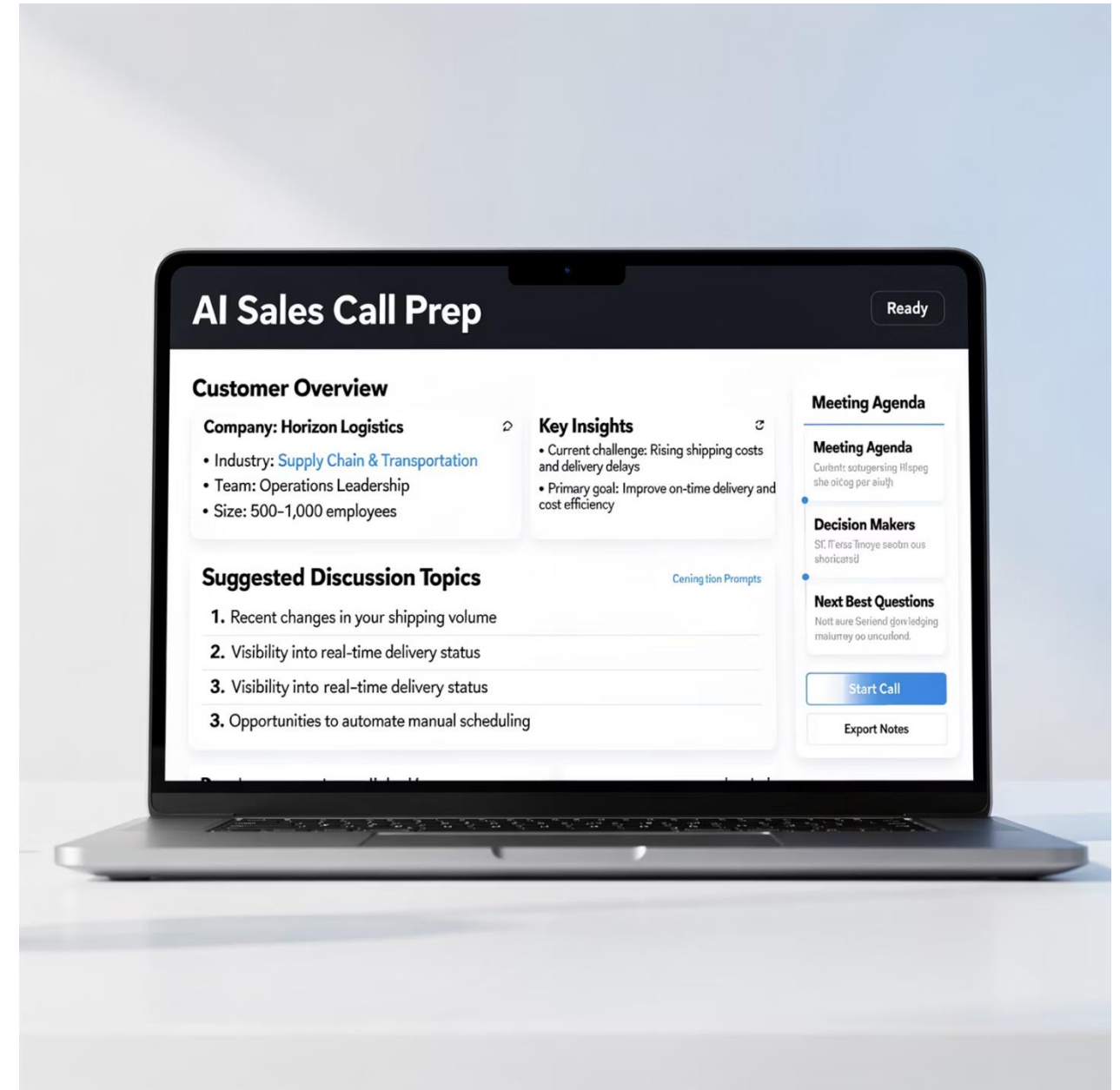
"Identify 15 independent dental practices in Austin, TX with 2-4 locations, websites showing they offer cosmetic services (veneers/whitening), active on Google with 50+ reviews, and no evidence of working with a dental service organization."

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

40%

Better Meeting Rates

Live Claude Demo



You're my AI Prospecting Assistant. Your job is to help me find independent dental SMBs (no chains or franchises) that likely have \$5K–\$10K/month advertising budgets. For general businesses in Charleston, South Carolina to do the following:

1. Identify 20 independent businesses that match, using this logic: - Located in or near an affluent or growing market - Offer premium or specialized services (e.g., general dentistry, cosmetic dentistry, orthodontic specialists and oral surgeons) - Have a professional-looking website (modern, mobile-friendly, clear messaging) - Appear active in the market (Google reviews, recent updates, or community engagement) - Are not part of a chain, franchise
2. For each business, return: - Business Name - Website - Contact Name & Title (owner/marketing decision-maker if available) - Email - Phone - Location - 2–3 sentence summary of visible marketing gaps or missed opportunities (e.g., no SEO, outdated site, no lead capture, weak branding) Return everything in a clean table format. Only include dental practices that appear to fit the \$5K–\$10K/month ad budget profile based on the criteria above