

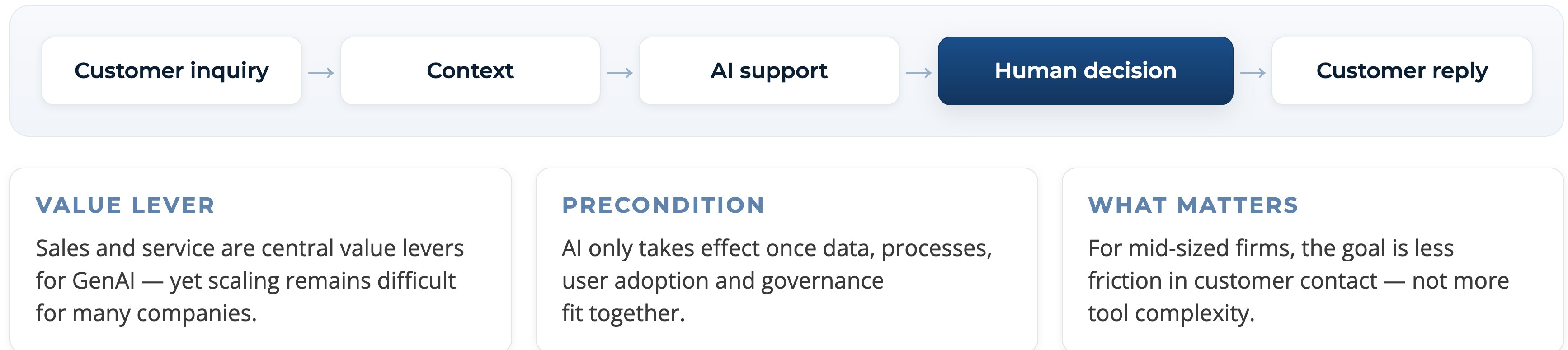
— MANAGEMENT BRIEFING

AI for Sales and Customer Communication

How mid-sized companies can deploy AI so that customer proximity,
speed and control work together.

AI only becomes effective in sales when it strengthens customer proximity

AI should not generate “more content” but **better, faster and more consistent** customer communication.



The biggest lever is relief from administrative work

Selling time is scarce. AI should first reduce routine work.

28%

of the working week in sales is actually spent selling.

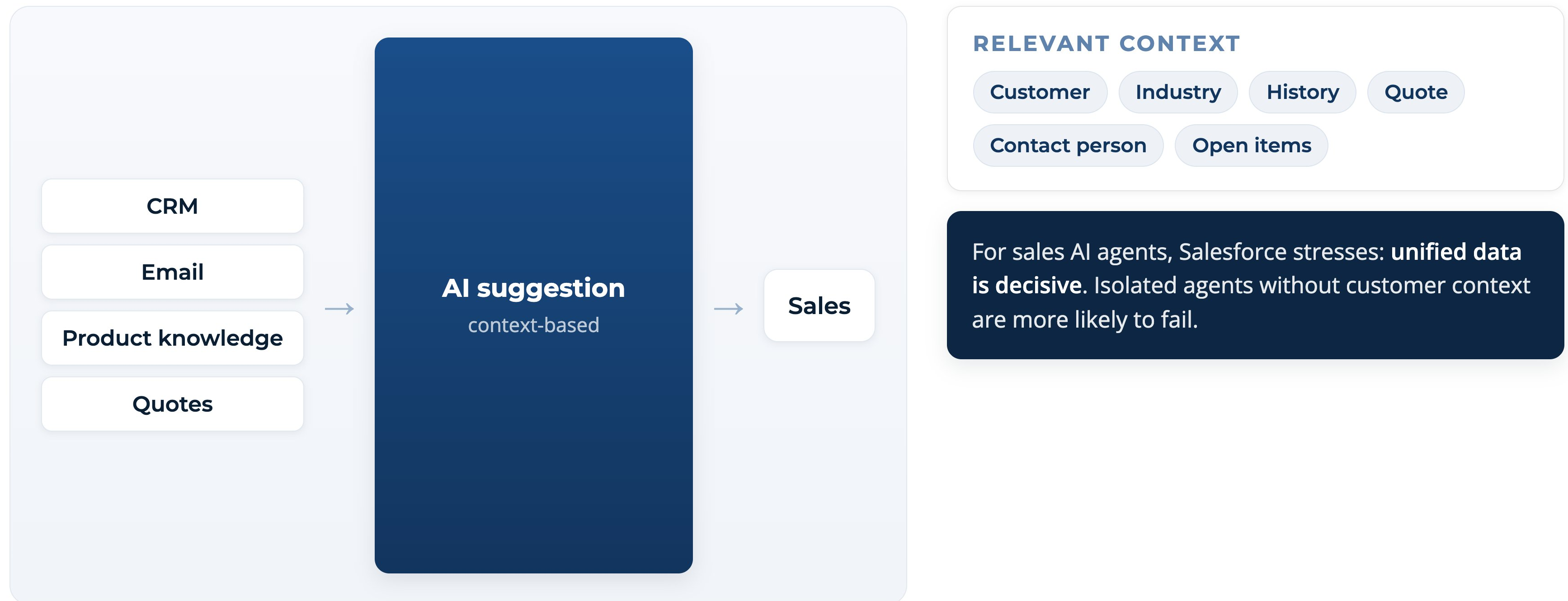
The rest: administration, deal management, data entry, coordination and waiting.

Source: Salesforce, State of Sales

Routine task	AI support	Human review
Call notes	Automatic summary	Content sign-off
CRM updates	Pre-filled fields	Check before saving
Follow-ups	Draft and proposed timing	Approval to send
Quote drafts	Structure and text proposal	Price and terms
Lead summary	Consolidated from CRM and email	Prioritization

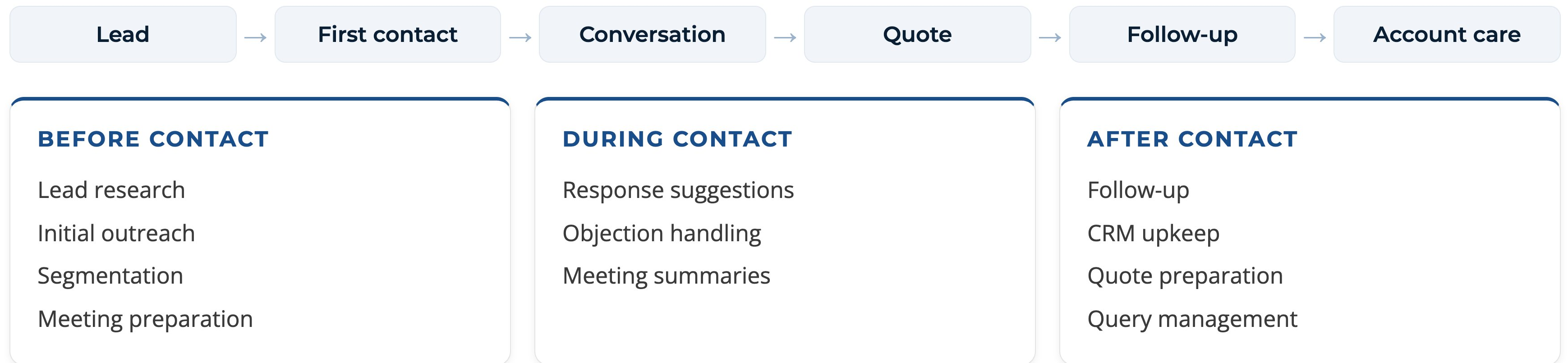
AI communication needs context, or it comes across as generic

Without customer data and company knowledge, AI produces interchangeable answers.



The best use cases sit along the customer journey

AI should start where frequent customer contacts create recurring work.



Customer communication must not feel fully automated

AI delivers drafts, unifies tone and shortens response times — but not arbitrary mass communication.

AI drafts

Draft



Human reviews

Control



Company responds

with commitment

CLARIFY APPROVAL LOGIC

- ☐ May AI only draft?
- ☐ May AI send on its own?
- ☐ For which topics is approval mandatory?

ALWAYS WITH APPROVAL

Prices

Commitments

Escalations

Complaints

Critical communication stays with leadership or sales.

Service and sales must be considered together

Customers do not distinguish between sales, support and order fulfillment.

2025

is the year many service organizations pilot customer-facing conversational GenAI, according to Gartner.

≥ 70 %

of customers will start their service journey via conversational AI by 2028. (Gartner)



CUSTOMER

experiences one interface

Mid-sized firms need consistent interplay of intake, qualification, response and handover.

Data protection and shadow AI are real sales risks

Customer data does not belong in arbitrary AI tools without control.

IBM 2025

There is a gap between fast AI adoption and missing governance. Ungoverned AI systems are hit by data breaches more often and at higher cost.

CRITICAL DATA

Personal data

Quotes

Contract details

Claims

Internal costing

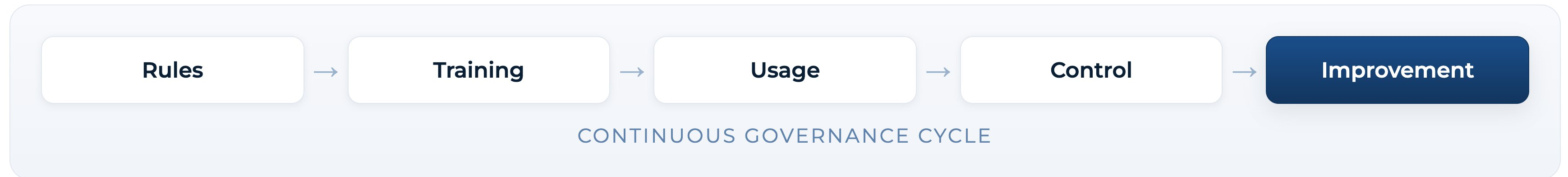
CHECK BEFORE EVERY USE

- ☒ Customer data permitted?
- ☒ Quote data permitted?
- ☒ Tool approved?
- ☒ Storage clarified?
- ☒ Access governed?

Required: approved tools, clear data boundaries, logging and training.

AI in sales is a leadership task, not a tool rollout

Without rules, you get poor data, misuse and disappointed expectations.



NIST AI RMF

Address AI risks systematically through governance, risk analysis, measurement and management.

EU AI ACT

Has made AI literacy mandatory since 2025 for providers and deployers of AI systems.

IN PRACTICE

Clear roles, approvals, monitoring and quality control.

Success is measured by outcomes, not by AI usage

Many generated texts are not yet sales success.

KPI	Today	Target after 90 days	Data source
Response time	Baseline	↓ faster	CRM / inbox
Follow-up rate	Baseline	↑ higher	CRM
Quote turnaround	Baseline	↓ shorter	ERP / CRM
CRM data quality	Baseline	↑ more complete	CRM
Win rate	Baseline	↑ higher	CRM

ALSO REVIEW

Customer satisfaction

Error rate

Complaints

Manual corrections

Where AI in sales should start

The first use case must be small enough to control and big enough to matter.

GOOD STARTING POINTS

Inquiry qualification

Conversation summaries

Follow-up

Quote preparation

Knowledge search

NOT AS A STARTING POINT

Fully automated price negotiation

Legal commitments

Complaint escalation without approval

APPROVE ONLY WITH

Benefit

Data

Risk

Approval

System integration

KPI

Owner

— NEXT STEP

Make sales and customer communication AI-ready

The next step is not buying a tool, but a structured review of your customer processes.

01

KrambergAI assesses suitable use cases, data situation, risks and rollout path.

02

Result: a decision basis for leadership, sales and service.

03

Goal: faster communication, better preparation and controlled AI use.

 **Have your sales AI potential assessed**

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