



# Maximizing Growth with CRM & AI in Sales and Marketing

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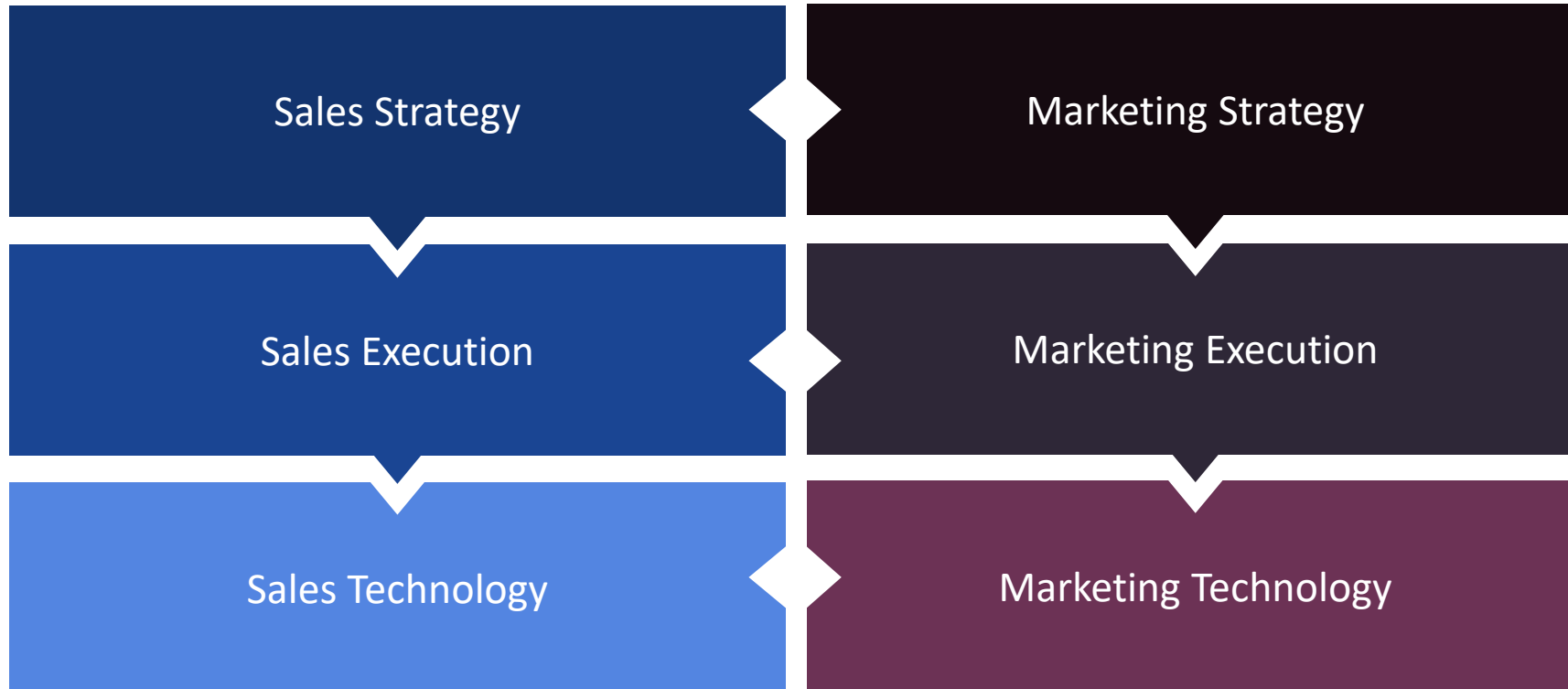


# Today We'll Cover:

1. State of the Market
2. ROI
3. Promise and Hype
4. Getting Started



# Launch Team Inc.



40 years in advanced manufacturing ♦ Helping companies grow & change



# Amplifying Your Resources

**AI**

**Automation**

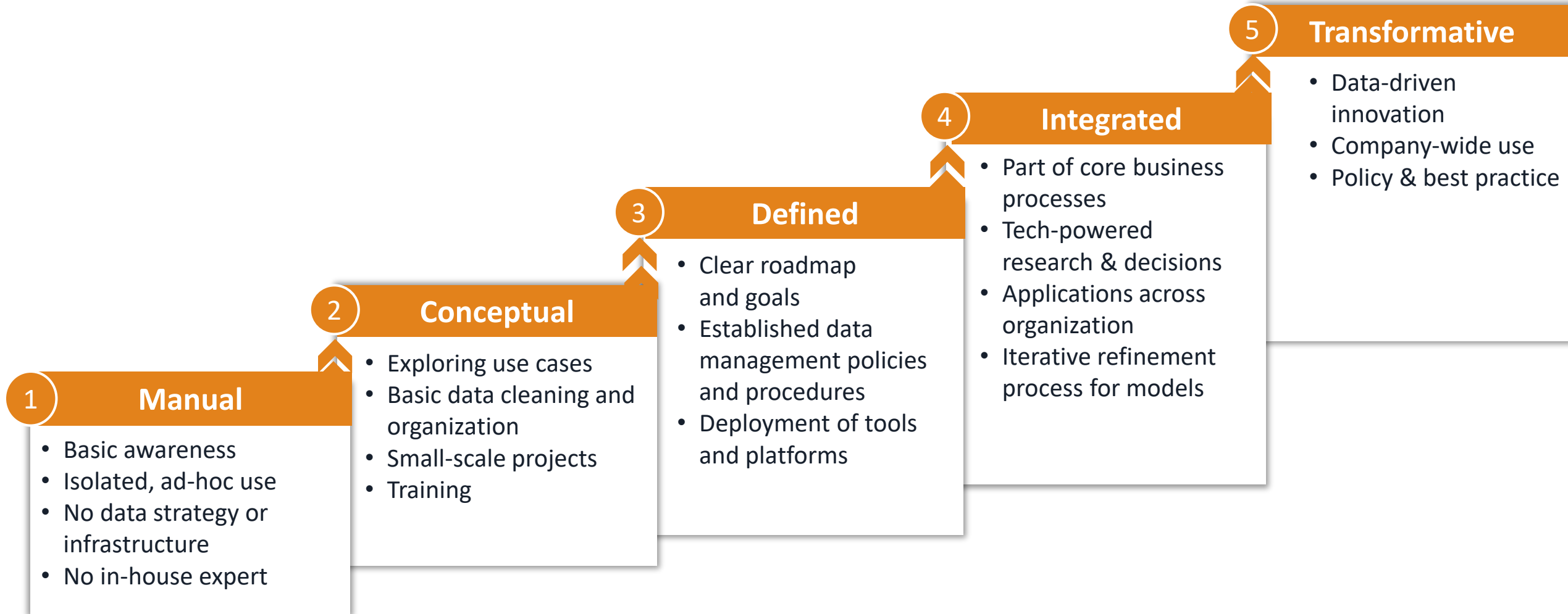
**CRM**

**Scale of 1–5:**  
**Where is your organization today?**

**What do you want out of this  
session?**



# Maturity Model: Where's Your Org?



# CRM Strategies



**1/3**

**of a salesperson's day is spent  
talking with prospects**



**43%**

**of sales & marketing people lack  
accurate data on accounts**

20%

productivity improvement through  
marketing automation

**Companies with effective sales/marketing collaboration  
outperform the others by**

**3x**

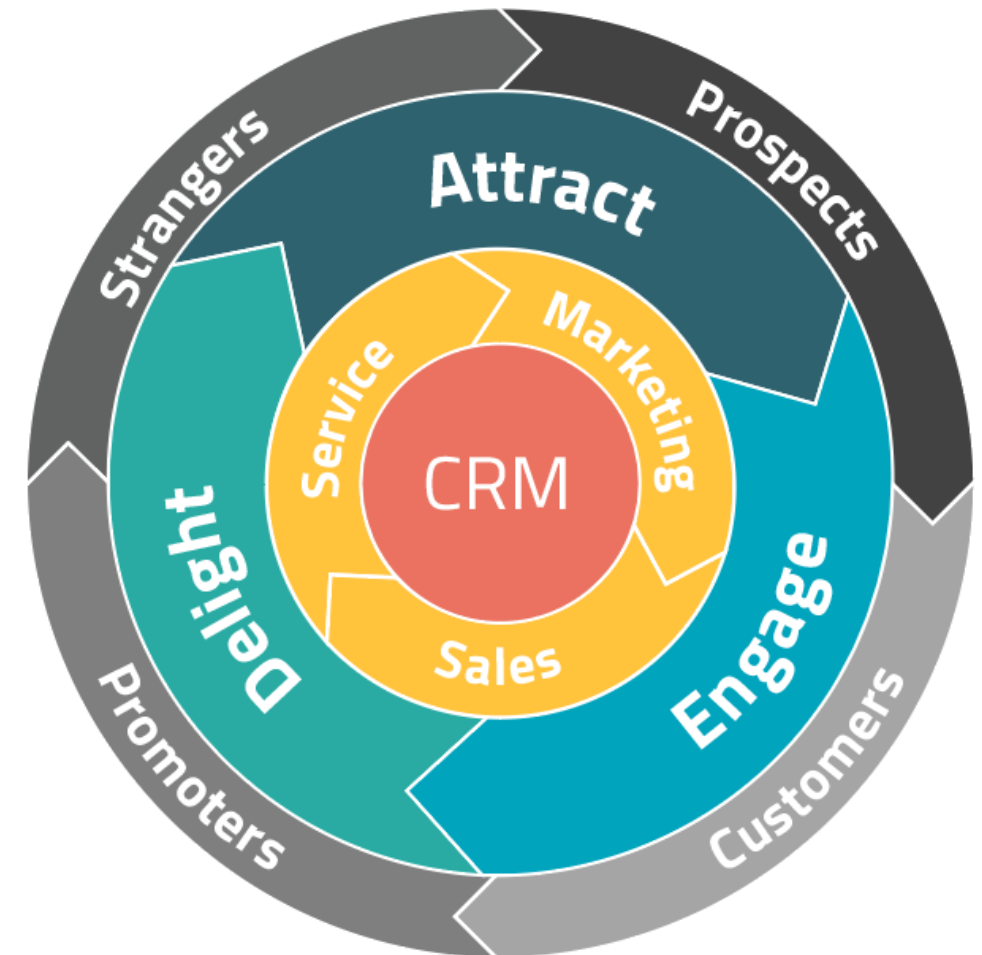
# 76%

of manufacturers have a CRM—  
but 2/3 of these implementations fail  
due to adoption



# Why It Matters

- Customer experience
- Increased revenue
- Smoother operations
- Predictable forecast
- Less fear





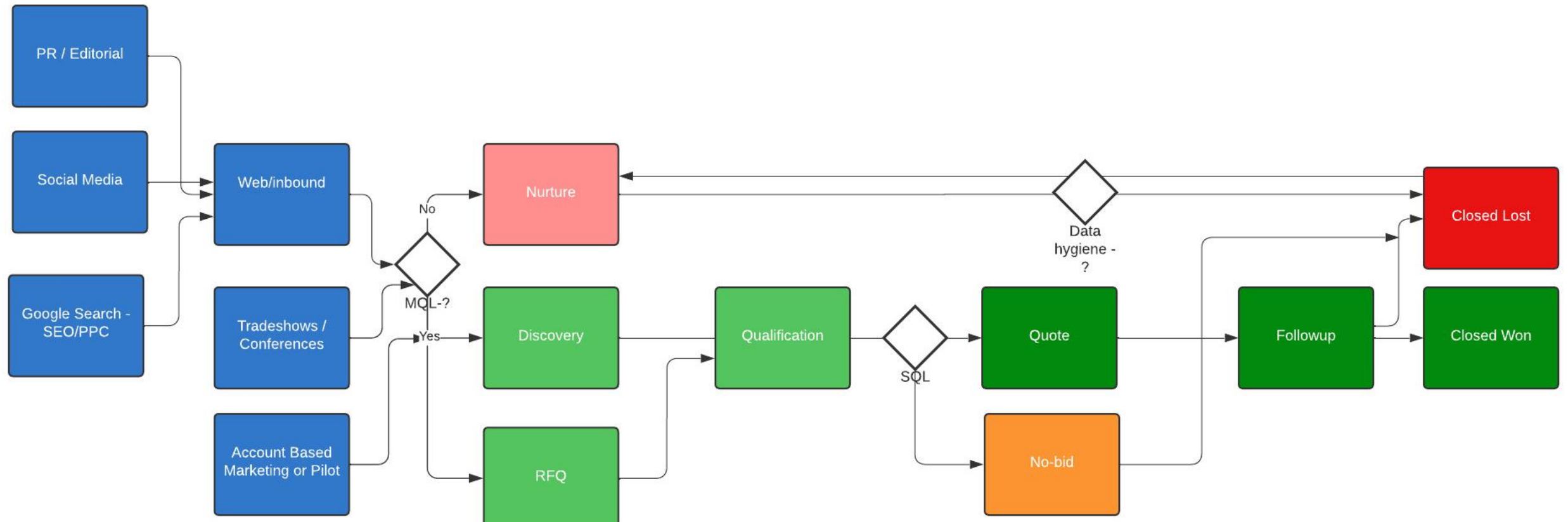
# Improving CRM Success

1. Get a CRM. Use it. Add complexity if and when required.
2. It starts at the top—who's your executive sponsor?
3. Define your sales process with clarity on:
  1. HOW deal moves to next stage—who does what
  2. Where can you reduce friction/delay?
  3. Goals, broken down from revenue to activity
  4. Reporting—who needs to know what?
4. Understand each employee's daily work today, set ways of work to fit



# Design Your Pipeline with KPIs in Mind

Who owns each box?  
What action moves a prospect from one box to the next?





# Qualification: Boiled Down to the Basics

Rapport

Seen as credible? Aligned in values?

Pain

Do they have a problem worth solving?

Money

Can they afford to solve it?

Proof

Demonstrate ability to solve—agree

Decide

Yes/No & Timeline





# KPIs for Leadership and Investors

Revenue & Margin

Work backward from revenue & deal size, and conversions to set traffic & lead targets

Opportunity-to-Win Ratio

Quote-to-Closed Won and Conversion at every stage

Deal Size

Average deal size, and trend

Pipeline Velocity

$\# \text{ SQLs} \times \text{Average deal size} \times \% \text{ win rate} / \text{average sales cycle in days}$

Customer Acquisition Ratio

$\text{Customer Lifetime Value} / \text{Customer Acquisition Cost} (>3)$

ROI

Return on Investment—per channel



# Improving Adoption

- Include in onboarding—every employee who touches the customer, every day
- Continuous improvement—micro learning
- Super user group
- Compensation tied to CRM



# What about Charlie?



# AI & Automation





# ROI on AI & Automation in Sales & Marketing

**+29%**

sales productivity  
from automation

**5.4x**

ROI from marketing  
automation

**250%**

Increase in AI  
adoption in  
marketing 2023



# AI & Automation

## Promise

- Early market/application research
- Lead scoring
- Target accounts
- Personalization
- Enable Omnichannel
- Self-service chatbot
- Data hygiene & analysis

## Hype

- 100% automation
- Design/creative
- Replaces your marketing team/firm



# Current State of AI: Wins & Fails





# Impact of Google AI Overviews

## ◆ AI Overview

Some of the top metalworks manufacturers in the United States include: [🔗](#)

- Mayville Engineering Company (MEC): The largest steel fabricator in the US, with over 2,200 employees and 20 locations [🔗](#)
- O'Neal Manufacturing Services: A high-quality metal fabrication company with nine locations across North America [🔗](#)
- Kurt Manufacturing: A global leader in precision, engineered metal components and products [🔗](#)
- Nix Metals: A family-owned company specializing in metal fabrication and specialty trades contracting [🔗](#)


• BMT: A company that provides a wide range of metalworking machinery, including

Show more ▼

Top 20 Best Architectural Metal Fabricators  
Jun 15, 2023 — Julius Blum & C  
many years of experience of suc

 TBK Metal

Top 21 Metal Manufacturing  
Revolutionizing US Industries

 Inven

44 Top Steel Construction C

## From sources across the web



O'neal Manufacturing Ser... ▼



Steel Dynamics ▼



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# Where does AI fit in marketing?

## AI for Marketing

- Not a replacement
- Productivity at start and end
- Start: Preliminary market research: top 10 targets, technology overview for your own learning
- End: A/B test recommendations, editing/ grammar
- Keep experimenting, take the 20% productivity boost
- Increases need for strategy and creative, brand tone

## Marketing for AI

- Start to format/target your content for AI
- Identify your top 3 “pillar” topics—SEO keywords you must defend
- Listen to how your customers speak about their problem, how they search
- Republish, update, combine content formatted for AI
- Create new long-form content to support those topics



## Early Wins

- Preliminary research—hours to minutes
  - Ex: top businesses in a market, demographic research, market sizing
- Meeting notes & action items
- Inbox hygiene
- Data hygiene
- Summary notes across chats & platforms
- First 3 steps

## Concerns

- Security & intellectual property
- ITAR & unknown regulatory environment
- Same bias as people who train it
- Increases need for strategic and critical thinking
- Policy & regulation—with frequent updates
- Groupthink



# Practical Notes

- **Pick your platform**
  - Microsoft? Copilot
  - Google? ChatGPT or Gemini
  - Consider separating platforms for personal and work
- **Plan to pay for it**
  - Institutionalizing will require data security
  - Teams/Pro versions will let you share proprietary prompts
- **Get your foundation in place**
  - Get your file naming conventions in order
  - Get your folder structure in order
  - Know your brand: Document brand guidelines, tone, positioning, key messages
  - Know your customer: Document customer personas, VOC
- **You can't afford to fall behind the competition**

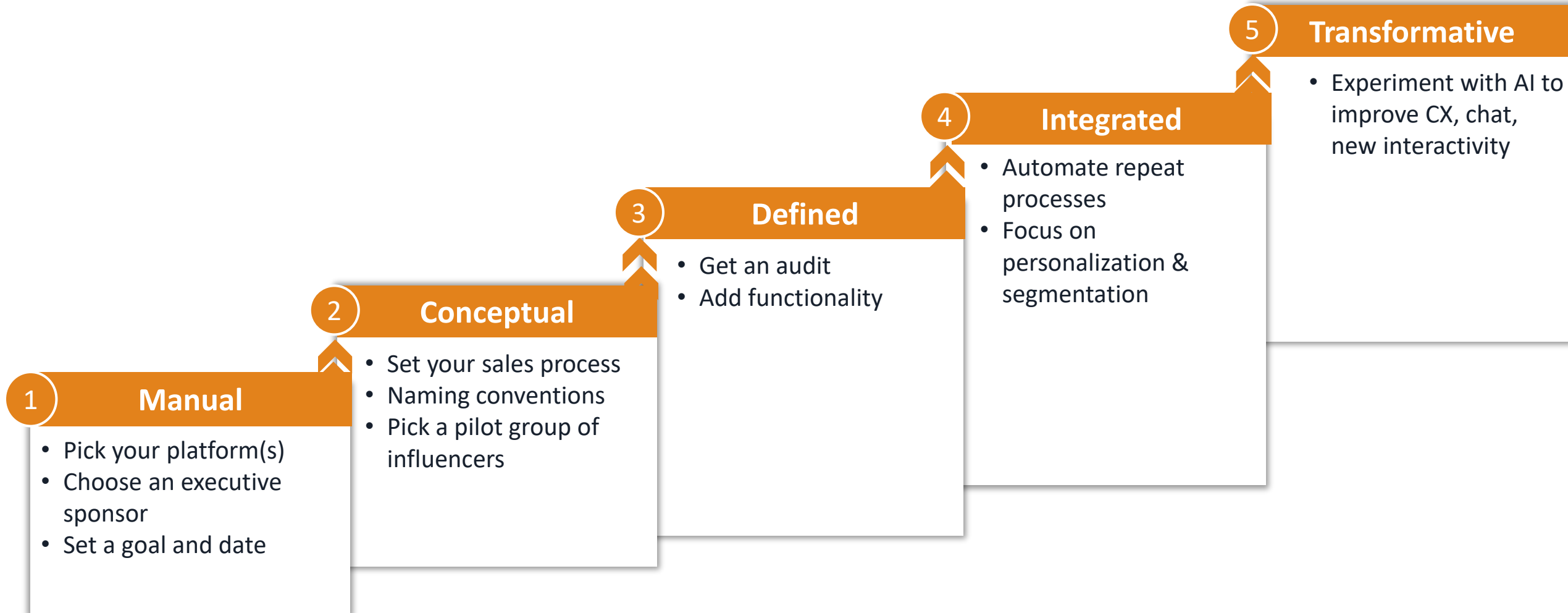


# Hard Truths

- **Most people distrust AI—prepare for resistance**
  - 75% fear for their jobs
  - 90% fear it will be used for nefarious purposes
- **Most people dislike change**
- **AI won't create competitive advantage—but it can erode yours**
  - Margin pressure, skilled labor shortage, rising salaries
  - Omnichannel customer expectations—demand automation & smart AI
  - If others can obtain the same insights or advantages with AI, it's not an advantage
  - It's a matter of keeping up, not getting ahead, at this point



# Advancing Your Maturity



# Questions?



## Request a Consult

**We can help to:**

Utilize AI in sales and marketing effectively

Benchmark your sales & marketing

Ready your people for change

