



Suhas Bhairav

AI Sales Process Opportunity Map

A beginner-friendly worksheet to identify and operationalize AI in sales workflows.

Identify AI opportunities across core sales stages with practical, weekly steps you can implement.

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Where AI Fits in Sales

AI can augment repetitive tasks and decision-making. Use this map to identify where to automate first.

Key move Start with a 2-week pilot in a high-impact area.

PRACTICAL CHECKLIST

- 01** Automate prospect research: summarize target accounts, extract firmographic data; keep human review for strategic notes and risk flags.
- 02** Automate qualification scoring: compute ICP fit and buying intent signals; human review for context and exceptions.
- 03** Automate outreach drafts: generate multi-channel templates; customize by segment; require human tone review.
- 04** Automate follow-ups: schedule reminders and replies; keep human override for complex objections.
- 05** Automate proposals: draft first-pass proposals; human reviewer handles pricing and terms.
- 06** Automate forecasting: feed CRM pipeline data to AI model; produce probabilistic forecasts; human sees outliers.
- 07** CRM hygiene: auto-suggest field updates and deduplication; requires periodic human verification.

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Weekly Adoption Steps

Follow this pragmatic, weekly rhythm to move from concept to measurable impact. Each step builds on prior work and requires clear ownership.

Key move Document owners and approvals early in each pilot.

PRACTICAL CHECKLIST

- 01** Week 1: audit data sources, owners, and tool options; define success metrics.
- 02** Week 2: select pilots for prospect research and outreach; configure automation rules.
- 03** Week 3: deploy templates and auto-fill in CRM; enable monitoring dashboards.
- 04** Week 4: run pilot with human review gate for quality and compliance.
- 05** Week 5: capture results, adjust rules, document learnings.
- 06** Week 6-7: scale to one more team; establish ongoing governance and feedback loop.

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Risks, Approvals, and Metrics

Establish guardrails to prevent misuse and ensure responsible AI use. Track the impact with clear, repeatable metrics.

Key move Publish a runbook with owners and success criteria.

PRACTICAL CHECKLIST

- 01** Define automatable tasks vs human-review rules (pricing/terms integration).
- 02** Data requirements: contacts, CRM fields, emails, notes, and approval logs.
- 03** Tools needed: LLMs for drafting, CRM connectors, data enrichment, governance platform.
- 04** Risk management: monitor hallucinations, data leakage, bias, and compliance.
- 05** Approvals: multi-person sign-offs required for automated pricing or terms.
- 06** Measurement: track cycle time, win rate, forecast accuracy, and close rate.
- 07** Ownership: assign sales ops and data steward responsibilities.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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