

# How Technology Empowers Sales

01.07.2025, Schachinger Solutions GmbH



# + Agenda

01

Sales Today  
and Reality

02

Challenges  
Core Issues

03

Technology  
Leverage

04

Recipes  
Practical Playbooks

05

Outlook  
What's up next?



# Sales Today

67%

through

10

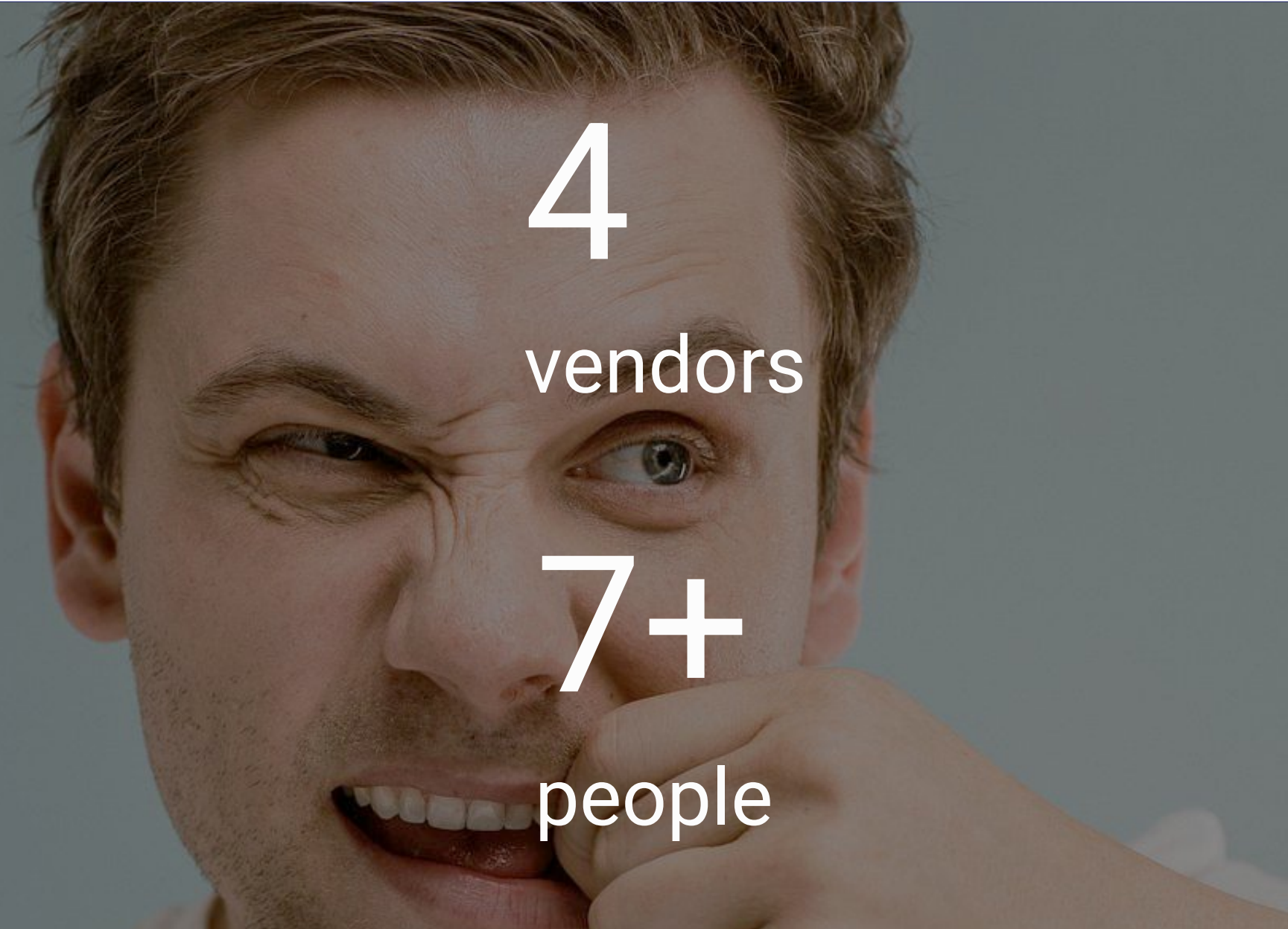
months

4

vendors

7+

people



Face To Face

Digital

Hybrid



Push

Pull



## Customer Behaviour

Bigger decision group  
Buyer research online

→ Seamless journey is expected

## Sales Transformation

Hybrid selling is the new normal  
Face2Face & digital touch points

→ Flexibility across channels wins

We need to systemically leverage tech to  
unlock sales potential



# Challenges

## Opaque funnel

- Limited deal visibility
- Hard to forecast revenue

## Long cycle times

- Multiple manual steps
- Delays from hand offers

## Low response rates

- Generic outreach ignore
- Need personalization

## Missing current data

- Decisions made on stale reports

... and many many more

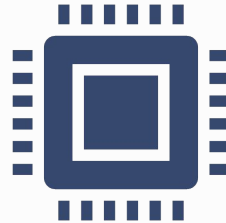




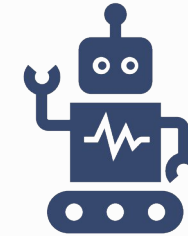
# Technology



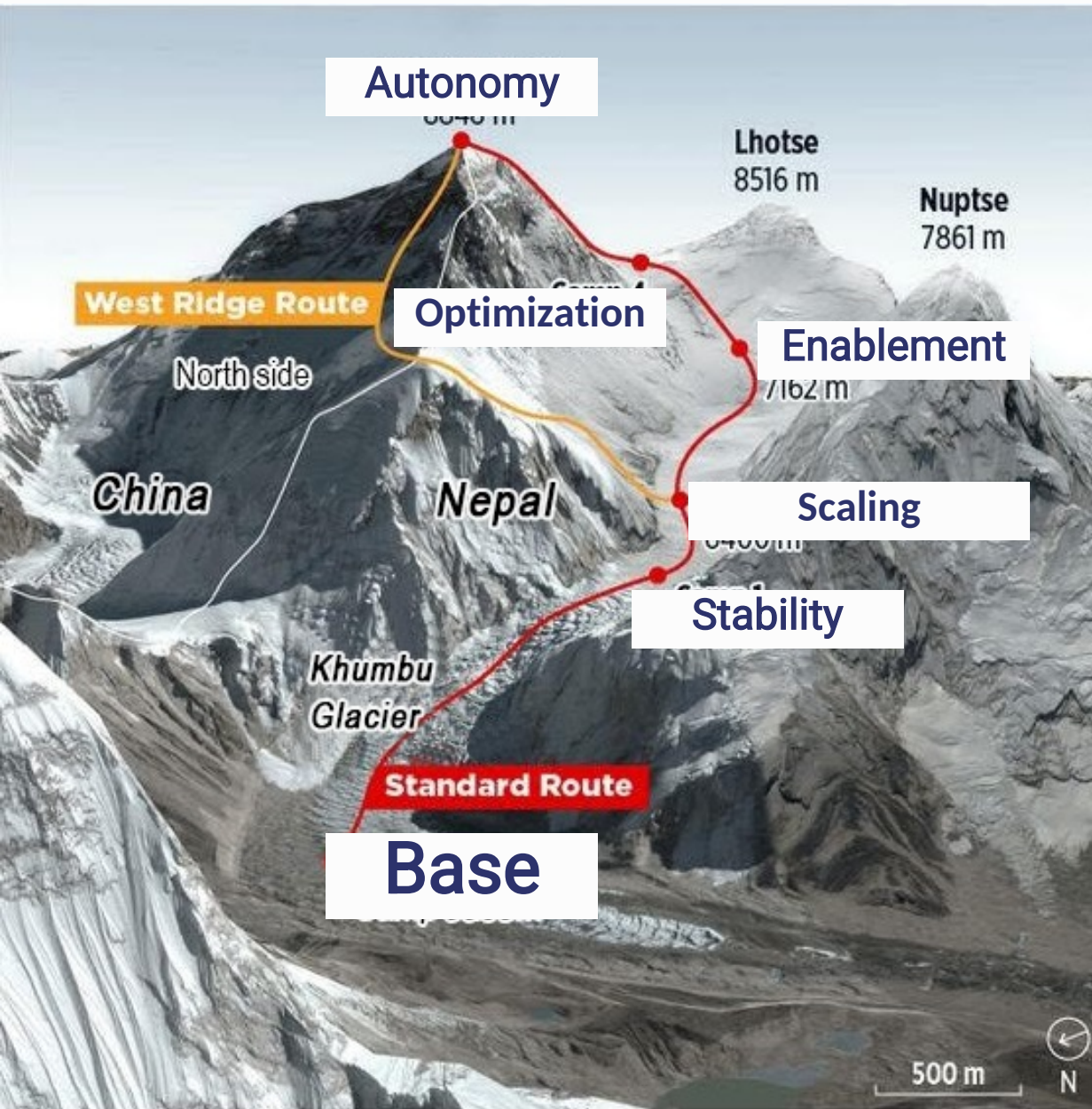
**Digitalization**  
Customer Relationship  
Management (CRM)



**Automation**  
Repetitive tasks, E-Mail  
Sequences, Lead  
Scoring, etc



**AI**  
Research,  
Personalization and data  
based



## Base (Foundation)

CRM, email/calendar sync, task tracking

## Stability (Process Discipline)

Sequences, templates, scheduling, mobile tools

## Scaling (TOFU Automation)

Lead gen tools, enrichment, outreach automation

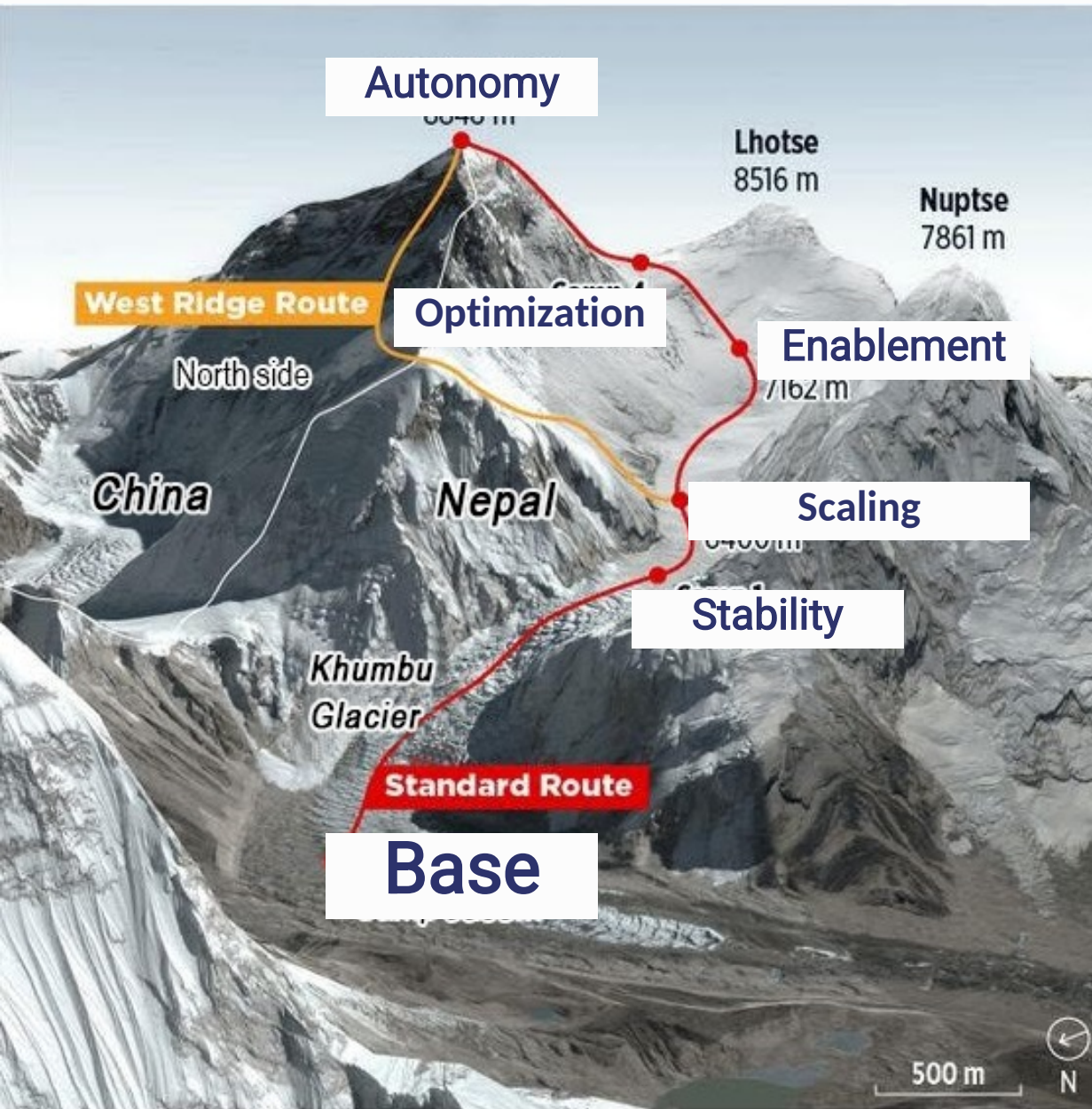
## Enablement (Sales Materials)

Proposals, one-pagers, product knowledge, e-sign

## Optimize (Insight & Control)

Deal tracking, activity analytics, conversion feedback

## Autonomy (AI & Automation)



Each camp = a tech layer for a *specific sales capability*

You (mostly) can't skip camps

Climbing fast = risk of collapse

The summit is only reachable if everything below is solid and aligned



# Technology (Examples & Excerpt)

Stage	Process	Example (excerpt)
Lead Research	Find and collect contacts	Apollo, LinkedIn
Lead Qualification	Score and prioritize leads	HubSpot, ActiveCampaign
Outreach	Initial contact via email/LinkedIn	Gmail/Outlook, Instantly, LemList, Invidio/Loom
Follow-Up Sequences	Auto-email follow-ups	Instantly, LemList
Meeting Scheduling	Book calls with prospects	Calendly
Discovery Call	Qualify needs / present offer	MS Teams, Google Meet, optionally Gong/Chorus/SalesPack
Proposal Creation	Send branded proposals or PDFs	Canva, PandaDoc
Contract Signing	Collect e-signatures	DocuSign
Invoicing	Send payment requests	Stripe, Zervant
Client Follow-up	Retain, upsell, renew	CRM tasks, ActiveCampaign, simple automations
Analytics & CRM	Track pipeline, tasks, KPIs	HubSpot, Pipedrive

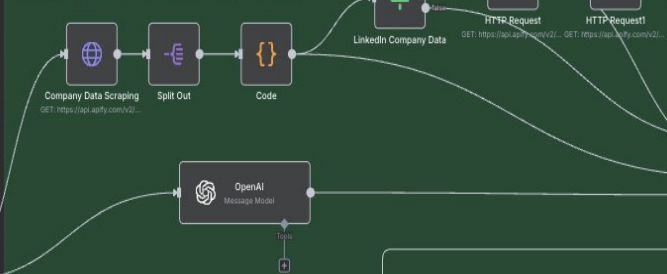
## Lead Ingestion & Validation Pipeline

1. Lead Capture Form - Gathers raw contact details.
2. Prepare Lead Data - Maps and structures inputs for consistency.
3. Email Verification - Calls external API to confirm address legitimacy.
4. Email Validation Check - Routes valid leads onward, logs invalid ones in slack.



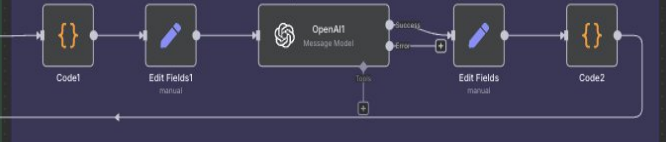
## LinkedIn & Social Enrichment + AI Summary

1. HTTP Request3 - Pulls HTML & metadata from the company's website
2. Company Data Scraping - Extracts firmographics (industry, size, location)
3. Split Out - Routes data into parallel enrichment streams
4. Code - Cleans, normalizes & maps fields for consistency
5. LinkedIn Company Data - Filters valid LinkedIn URLs from scraped social feeds
6. HTTP Request - Retrieves company profile details via LinkedIn API
7. HTTP Request1 - Pulls recent company posts and social updates
8. OpenAI - Synthesizes website, firmographic, and social data into a concise summary
9. Merge - Appends all insights into a unified payload for downstream personalization



## AI Enrichment & Formatting

1. Code1 - Merges website, social and firmographic data into a single JSON payload
2. Edit Fields1 - Selects and renames keys to build a clear AI prompt context
3. OpenAI Message Model - Generates a tailored company summary and talking points
4. Edit Fields - Extracts AI response, mapping summary into template variables
5. Code2 - Cleans text, validates schema and outputs the final enriched lead object



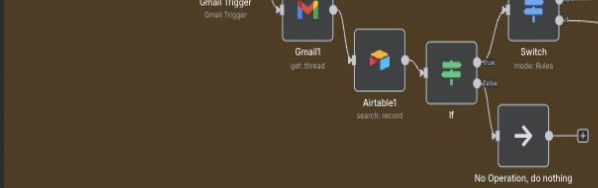
## AI-Driven Outreach Workflow

1. Lead Behavior Analyzer - Ingests lead actions & engagement signals to classify readiness
2. Email Sequence Generator - Crafts multi-step outreach blueprint based on behavior insights
3. Email Content Preparation - Uses AI to generate personalized email drafts per sequence step
4. Wait - Pauses until the scheduled send time or next sequence interval
5. Gmail - Sends the personalized email via Gmail API
6. Code3 - Maps send result and metadata into a structured CRM payload
7. Airtable - Creates a record logging the outreach event and key metrics



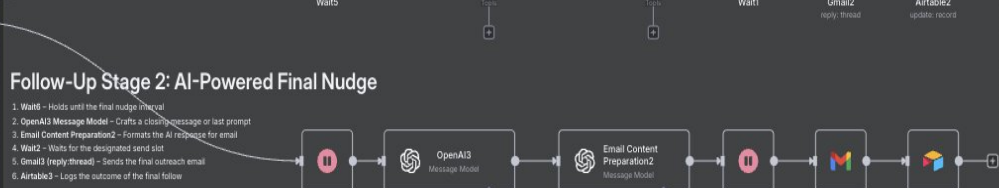
## Inbound Email Processing

1. Gmail Trigger - Listens for new incoming emails
2. Gmail1 - Retrieves the full email thread
3. Airtable1 - Looks up the lead record in CRM
4. If - Checks record existence (true/false)
5. Switch - Applies routing rules based on stages
6. No Operation - Ends flow when no rules match



## Follow-Up Stage 1: AI-Driven First Reminder

1. Wait5 - Pauses until the first follow-up window
2. OpenAI2 Message Model - Generates personalized reminder content
3. Email Content Preparation1 - Structures AI output into an email draft
4. Wait - Delays until the scheduled send time
5. Gmail2 (reply:thread) - Sends the reminder in the existing thread
6. Airtable2 - Updates the lead record with follow-up status



## Follow-Up Stage 2: AI-Powered Final Nudge

1. Wait6 - Holds until the final nudge interval
2. OpenAI3 Message Model - Crafts a closing message or last prompt
3. Email Content Preparation2 - Formats the AI response for email
4. Wait2 - Waits for the designated send slot
5. Gmail3 (reply:thread) - Sends the final outreach email
6. Airtable3 - Logs the outcome of the final follow



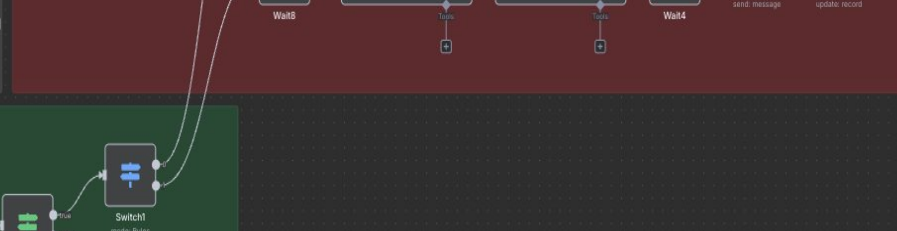
## Reminder Paths

### First Reminder

- Wait7 delays to the initial follow-up slot
- OpenAI4 generates the first reminder content
- Email Content Preparation3 formats the draft
- Wait3 waits for the send schedule
- Gmail4 sends the follow-up
- Airtable5 logs the event and outcome

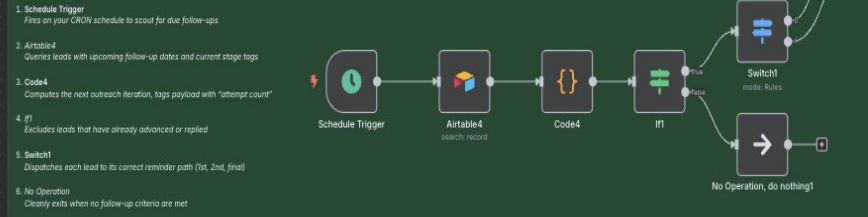
### Final Reminder

- Wait8 delays to the final nudge slot
- OpenAI5 crafts the closing message
- Email Content Preparation4 structures the email
- Wait4 holds until the designated send time
- Gmail5 dispatches the final outreach
- Airtable6 archives the final follow-up status



## Stage-Aware Follow-Up Scheduler

1. Schedule Trigger - Fires on your CRON schedule to scout for due follow-ups
2. Airtable4 - Queries leads with upcoming follow-up dates and current stage tags
3. Code4 - Computes the next outreach iteration, tags payload with "attempt count"
4. If1 - Excludes leads that have already advanced or replied
5. Switch1 - Dispatches each lead to its correct reminder path (1st, 2nd, final)
6. No Operation - Cleanly exits when no follow-up criteria are met



- Technology = Lever, not an opponent
- Use it, where it positively serves/blends in with your customer  
→ Example Calendly (Meeting Time Proposal)

Dear Mr. Groß,

Thank you very much for your inquiry.

As a first step, I would be happy to learn more about you and your company.

Would you have 30 minutes available for an initial introductory call on one of the following dates:

- Thursday, July 3 at 3:00 PM
- Friday, July 4 at 9:00 AM
- Tuesday, July 8 at 10:00 AM

If none of these times work for you, feel free to suggest alternatives or simply check my [availability directly in my calendar](#).

I look forward to our conversation.

## Geben Sie Details an

Vorname \*

Nachname \*

E-Mail-Adresse \*

Gäste hinzufügen

Ort \*

☐  Microsoft Teams

☐  Zoom

Bitte gib alles an, was bei der Vorbereitung auf unser Meeting hilfreich sein könnte.

Indem Sie fortfahren, bestätigen Sie, dass Sie die folgenden Dokumente gelesen und akzeptiert haben:

[Calendlys Nutzungsbedingungen](#) und [Datenschutzerklärung](#).

Termin buchen

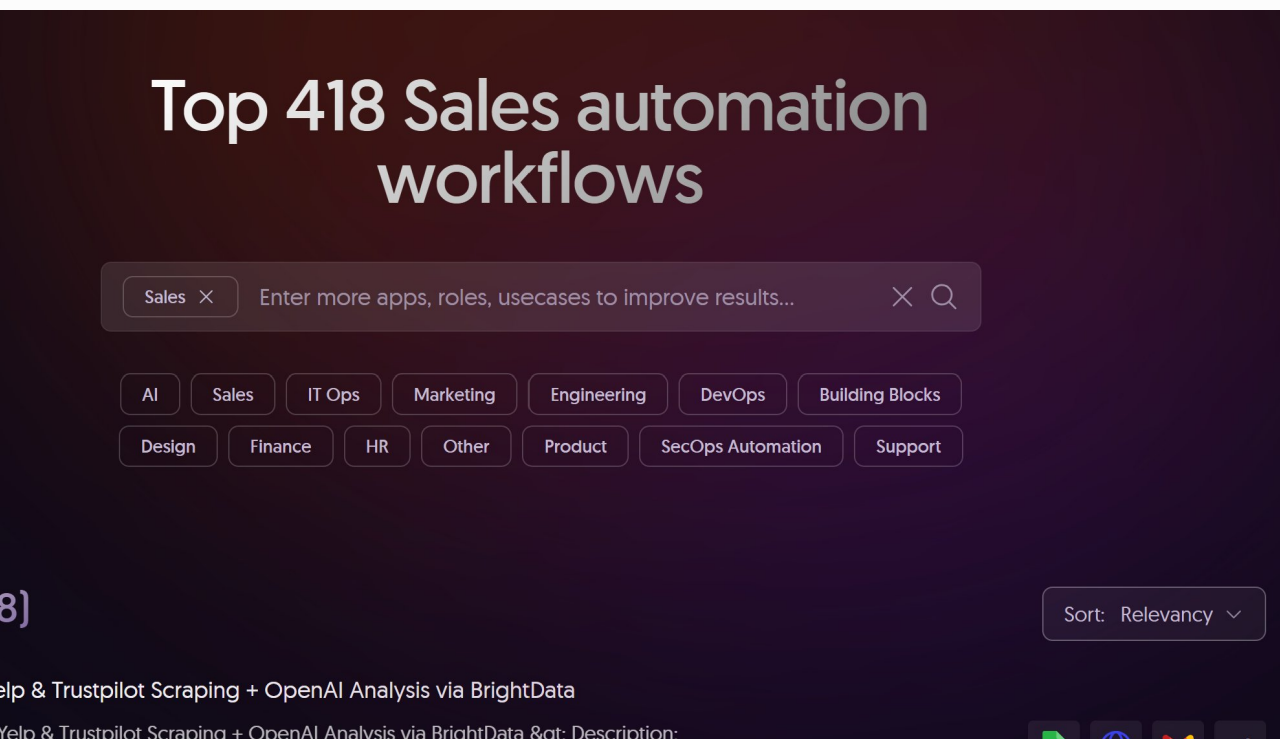


# Recipes

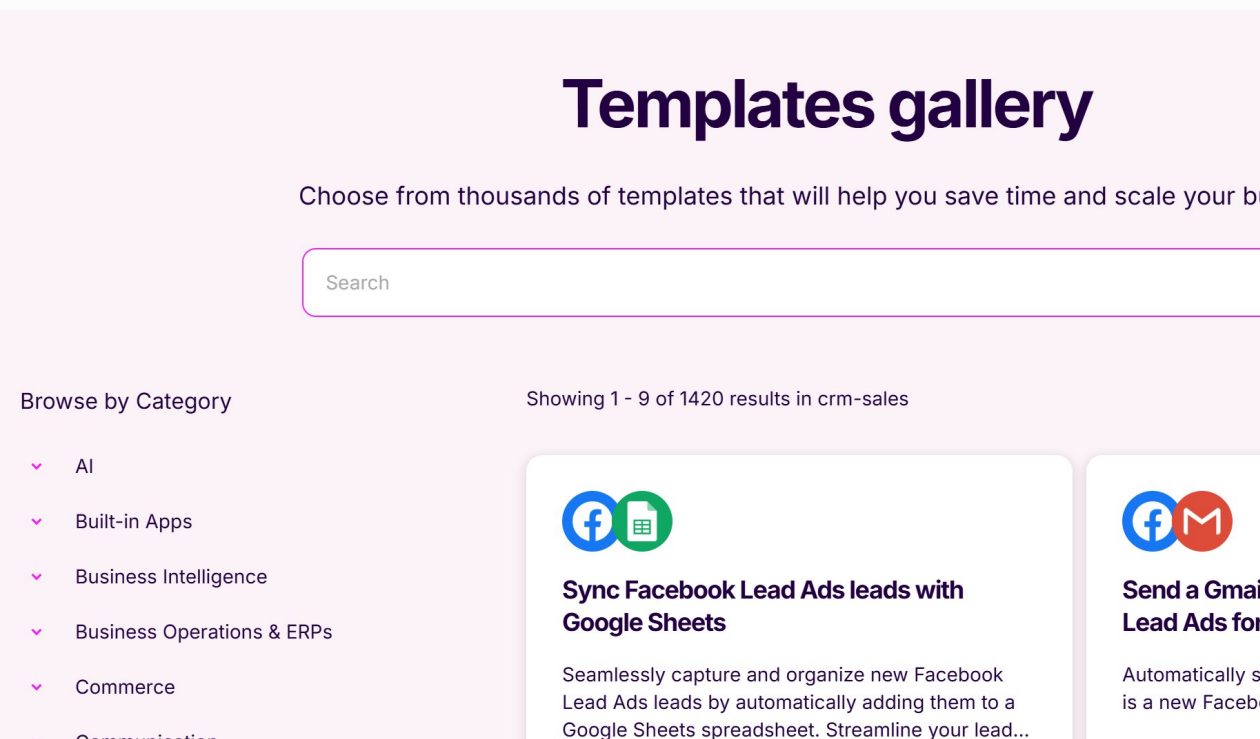


Build Your Own Stack

- start small, look out for ideas
- ensure integrations and fit

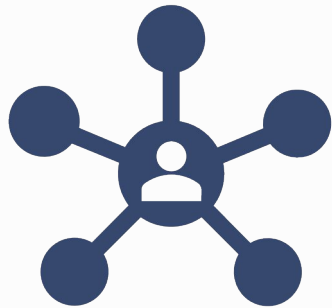


n8n.io



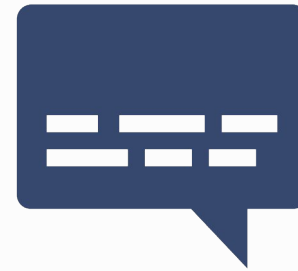
make.com

SCHACHINGER  
SOLUTIONS



## Social Media

LinkedIn AI Content Creation  
Voice & Text ([scripe.io](https://scripe.io))



## Sales Wingman

Research, Personalization, E-Mails etc  
Voice & Text ([chatgpt.com](https://chatgpt.com))

A hand is shown in the lower-left corner, reaching out towards a wireframe globe. The globe is composed of a network of white lines and dots, representing a global network or data structure. The background is a dark blue gradient with a subtle pattern of white dots and lines, suggesting a digital or technological environment.

**Align tech to process,  
not vice versa**

**Even the best tool  
won't help if you don't  
know how to use it**



# Outlook

- We only accelerate from here
    - Trend: Continuous tech evolution
  - Skill building becomes essential
  - Human + Tech blend
  - Action Plan
- Stay updated or fall behind
  - Tech helps, but know-how drives it
  - Relationships remain core
  - Audit -> Pilot -> Implement

**The climb begins with  
one little step**

# Thank You

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