QUICK REFERENCE GUIDE

Selling with AI

Use AI to amplify your Sandler methodology — research, prospecting, prep, and debrief.

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Key Principles

AI amplifies what you know. The tool is only as good as your ability to evaluate the output. If you don't know the right methodology, you can't tell the AI it's wrong.

+ Key Rule

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PRINCIPLE #1

AI Amplifies What You Know

AI doesn't replace training. It helps makes training more valuable. Without methodology knowledge, you can't evaluate or correct the output.

PRINCIPLE #2

Methodology Matters in Your Prompts

Include "Use the Sandler no-pressure prospecting methodology" or "Use the Sandler sales methodology." Without it, you'll get generic consultative output.

PRINCIPLE #3

Structure Beats Polish

AI doesn't care about your grammar, spelling, or formatting. A messy prompt with all five components will outperform a perfectly written sentence every time.

PRINCIPLE #4

It's a Conversation, Not a Search

Most people type one question and accept the first answer. That's using 10% of the tool. The value is in the back-and-forth. You need to push back, refine, and iterate. That's using AI to it's fullest capabilities.

PRINCIPLE #5

Context Resets Every Time

Each new conversation starts blank. The AI doesn't remember your last session (unless you're using a GPT or Project). Brief it every time, or build a GPT that holds your context permanently.

Platform Quick Reference

You don't need to master all of them. Know what each is good at so you pick the right tool for the job.

Platform	Best For	Watch Out For
ChatGPT	*GPTs (pre-built tools you can share), Projects (persistent context), web search built in. Most versatile all-around.*	Can be verbose. Push it toward practical language.
Claude	*Complex instructions, human tone, artifacts (builds docs/tables), connectors to Google Drive. Strong for coaching-style prompts.*	No shareable GPT equivalent. Context via Projects only.
Gemini	*Deep Research (full reports), Google ecosystem integration (Docs, Gmail, Drive), image generation.*	Less precise on nuanced sales prompts.
Perplexity	*Research with citations. Every answer sourced. Best for company research, competitive intel, verifying claims.*	Not a thinking partner. Research tool only.

Use Perplexity for company and person research (Template 5) for sourced, verifiable data.

ChatGPT **Claude** **Gemini** **Perplexity**

PROMPT STRUCTURE

The Briefing Framework

Think of AI like briefing your manager. The better the brief, the better the guidance. Every prompt should have these five components.

1

The Role

Who you need the AI to be. Sets the lens. "Act as my Sandler sales coach" or "Act as a market analyst."

2

The Situation

Context: What you sell, who you sell to, industry, geography. Your manager knows this. AI doesn't.

3

The Scenario

The specifics of this situation. The person, the company, the meeting type, what you know so far.

4

The Ask

What you actually need back. Be specific. "Give me 3 pains, 2 openers, and what to avoid."

5

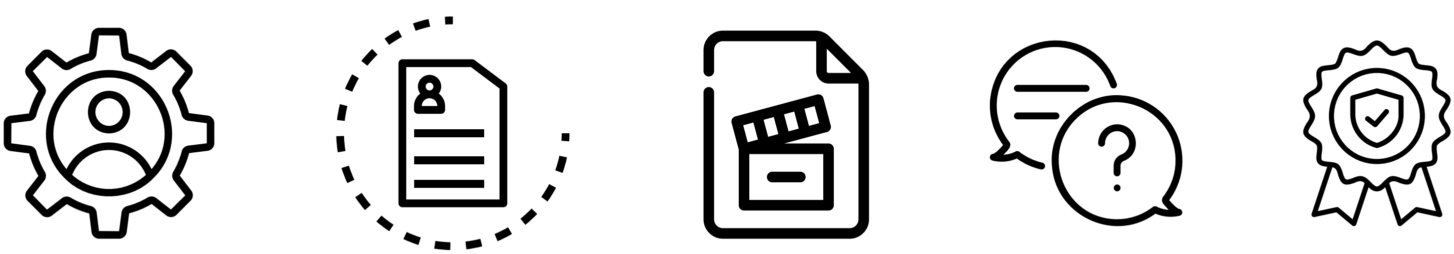
Your Standard

What good looks like. AI wants to please you — set the bar. "Practical, conversational, not corporatespeak. Label assumptions."

+

Remember

A messy prompt with all five components outperforms a perfectly written one-liner every time. Structure beats polish.



Role **Situation** **Scenario** **Ask** **Standard**

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ITERATION STRATEGY

The Debrief Loop

Your first prompt is a draft, not a final answer. The real, developed skill is the conversation after. Coach the AI like you'd coach a new rep.

REPEAT UNTIL USABLE

Brief → **Response** → **Debrief** → **Better Response**

Debrief Phrases That Work

"That's too generic — make it specific to [my industry]."	*"That sounds like a brochure. Make it sound like a real conversation."*
"Now do the same thing for [different title/role]."	*"Too many buzzwords. Simplify."*
"You're guessing — label what's an assumption vs. what's likely."	*"Tighten this up. I need to say it in 30 seconds."*

"That's a textbook answer. What would a real [title] actually say about this?"

Ready-to-Use Templates

1 Vertical Research

Use when: Entering a new market, quarterly planning, or building your territory strategy.

ROLE	*Act as a market analyst and sales strategist.*
SITUATION	*I sell [WHAT YOU SELL] to [INDUSTRY] in [GEOGRAPHY].*
SCENARIO	*I'm building my understanding of this market and need to know what's happening right now.*
ASK	*Give me the top industry pressures and trends, what's changing, the problems those changes create tied to what I sell, and where the biggest opportunities are.*
STANDARD	*Practical and sales-usable. I need to sound like I understand their world when I walk in the door, not like I read a textbook. Label anything that's an assumption.*

2 Stakeholder Mapping & Pain by Stakeholder

Use when: Understanding who matters in the buying process and what each role cares about.

ROLE	*Act as my sales strategist.*
SITUATION	*I sell [WHAT YOU SELL] to [INDUSTRY].*
SCENARIO	*I'm targeting [COMPANY SIZE / SEGMENT] and need to understand every stakeholder who matters in the buying process.*
ASK	*Build a table — Department | Titles | Top 3 pains tied to what I sell | What each role is measured on | Likely objections or stall points.*
STANDARD	*Pains must be specific to this industry, not generic business problems. I need to sound like I understand their job.*

Ready-to-Use Templates

3 Pre-Call Planning

Use when: Preparing for a specific meeting with a specific person.

ROLE	*Act as my Sandler sales coach.*
SITUATION	*I sell [WHAT YOU SELL] to [INDUSTRY].*
SCENARIO	*I have a [MEETING TYPE] with [NAME / TITLE] at [COMPANY]. Here's what I know so far. [WHAT YOU KNOW].*
ASK	*Help me build a pre-call plan: 1) Ideal outcome. 2) Minimal acceptable outcome. 3) An up-front contract I'd actually say out loud. 4) Three gap questions to uncover pain.*
STANDARD	*Conversational and practical — things I'd actually say. Up-front contract: 30 seconds max. Gap questions specific to this person's role and industry. Use the Sandler sales methodology.*

Note: *If you do this regularly, build a GPT with the role, methodology, and standard pre-loaded. Then you only need to provide the scenario each time.*

4 30-Second Commercial

Use when: Building or refreshing your prospecting commercial for a specific buyer.

ROLE	*Act as my Sandler sales coach.*
SITUATION	*I sell [WHAT YOU SELL] to [BUYER TITLE] in [INDUSTRY].*
SCENARIO	*I need a 30-second commercial for prospecting conversations with [TITLE].*
ASK	*Build a 30-second commercial using the Sandler no-pressure prospecting methodology. Start with a pattern interrupt, include 3 pain statements, and end with a soft curiosity question.*
STANDARD	*Conversational — it has to sound like me talking, not a script. No buzzwords. No pitching. Use the Sandler sales methodology and the Sandler no-pressure prospecting methodology.*

Note: Both the Sandler sales methodology AND the no-pressure prospecting methodology are mandatory. Without them, AI defaults to a consultative or challenger-style commercial.

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Ready-to-Use Templates

5 Company & Person Research

Use when: Getting a quick snapshot before a meeting. Best run in Perplexity for sourced data.

ROLE	Act as my research assistant.
SITUATION	I sell [WHAT YOU SELL] to [INDUSTRY].
SCENARIO	I'm meeting with [NAME / TITLE] at [COMPANY] on [DATE].
ASK	Give me a sales-relevant snapshot: recent news, priorities, pressures, change signals, what this role is typically measured on, and anything I should know walking in.
STANDARD	Focus on what's useful for a sales conversation. Label anything that's an assumption or couldn't be verified.

6 Competitive Differentiation

Use when: Going head-to-head against a specific competitor for a deal.

ROLE	*Act as a competitive sales strategist.*
SITUATION	*I sell [WHAT YOU SELL] to [INDUSTRY].*
SCENARIO	*I'm competing against [COMPETITOR] for a deal with a [BUYER TITLE] at a [COMPANY TYPE/SIZE].*
ASK	*Where do we win against them? Where do we lose? What should I say when the buyer brings them up? What questions expose their weaknesses without trashing them?*
STANDARD	*Practical and conversational. I need to sound confident, not defensive. No marketing language. Use the Sandler sales methodology.*

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Ready-to-Use Templates

7 Email Commercial (Written Pattern Interrupt)

Use when: Sending your 30-second commercial via email to a prospect.

ROLE	*Act as my Sandler sales coach.*
SITUATION	*I sell [WHAT YOU SELL] to [BUYER TITLE] in [INDUSTRY].*
SCENARIO	*I need to send a prospecting email to [TITLE] at [COMPANY]. This is [COLD / WARM] outreach.*
ASK	*Write a short prospecting email using the Sandler no-pressure prospecting methodology. Open with a pattern interrupt, include 2–3 pain statements, and close with a low-pressure curiosity question. Keep it under 100 words.*
STANDARD	*Conversational, human tone. No buzzwords, no pitching, no "I'd love to set up a call." The reader should feel curiosity, not pressure.*

8 LinkedIn Connection Message

Use when: Reaching out to a prospect on LinkedIn.

ROLE	*Act as my Sandler sales coach.*
SITUATION	*I sell [WHAT YOU SELL] to [BUYER TITLE] in [INDUSTRY].*
SCENARIO	*I want to connect with [NAME / TITLE] at [COMPANY] on LinkedIn. [OPTIONAL: Context or reason for outreach].*
ASK	*Write a LinkedIn connection request (under 300 characters) and a short follow-up message (under 150 words) using the Sandler no-pressure prospecting methodology. The tone should be curious, not salesy.*
STANDARD	*Human, brief, no pitch. I want to start a conversation, not make an ask. No "I'd love to pick your brain" or "let's connect and explore synergies."*

Ready-to-Use Templates

9 Prospecting Cadence Builder

Use when: Building a multi-touch prospecting sequence for a specific buyer.

ROLE	*Act as my Sandler sales coach and prospecting strategist.*
SITUATION	*I sell [WHAT YOU SELL] to [BUYER TITLE] in [INDUSTRY].*
SCENARIO	*I need a prospecting cadence for reaching [TITLE] at [COMPANY TYPE/SIZE]. Touches: [EMAIL / LINKEDIN / PHONE / COMBINATION].*
ASK	*Build a [NUMBER]-touch cadence over [TIMEFRAME]. For each touch: the channel, the message or talking points, and the intent. Each touch should use the Sandler no-pressure prospecting methodology.*
STANDARD	*No touch should feel like a follow-up or a chase. Each should bring new value or a new angle. Conversational, not scripted. No desperation language.*

Note: "No touch should feel like a follow-up or a chase." AI defaults to follow-up language like "just checking in" or "wanted to circle back." Your standard has to prevent that.

10 Post-Call Debrief

Use when: Right after a meeting to pressure-test what actually happened vs. what you hope happened.

ROLE	*Act as my Sandler coach. Be direct and honest.*
SITUATION	*I sell [WHAT YOU SELL] to [BUYER TITLE] in [INDUSTRY].*
SCENARIO	*I just had a [MEETING TYPE] with [NAME / TITLE] at [COMPANY]. Here are my notes: [PASTE NOTES OR SUMMARY]*
ASK	*Tell me: What was real pain vs. surface pain? What did I miss? What's the actual impact and priority? What's the decision reality? What are the stall risks? Should I advance, slow down, or exit — and why?*
STANDARD	*Be brutally honest. Truth over hope. Don't sugarcoat it. If the deal is weak, tell me. Use the Sandler sales methodology.*

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Building GPTs — Automate Your Framework

A GPT is a pre-built prompt that lives permanently in ChatGPT. Load the role, situation, template, and standard once. Then each time, you only provide the scenario.

WHEN TO BUILD

- You use the same prompt structure repeatedly (pre-call plans, commercials)
- The role, methodology, and standard are always the same — only the scenario changes
- You want to share the tool with your team so everyone gets consistent output

WHAT GOES IN THE BACK END

- **The Role** ("You are a Sandler sales coach...")
- **The Situation** (what we sell, who we sell to, our methodology)
- **The Template** (the exact output structure you want every time)
- **The Standard** (practical, conversational, label assumptions, etc.)

WHAT THE USER PROVIDES

- The **Scenario only** — who am I meeting with, what company, what do I know

A GPT doesn't replace understanding the framework. It automates it. If the output is ever off, you need to know how to coach it.

Your Challenge

Before your next sales meeting, run one of these templates for a real account. Pick Template 3 (Pre-Call Planning) or Template 5 (Company Research) and put it to work today.

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