STRETCHLEARN · WORKBOOK

AI for Sales & Prospecting — Workbook

This workbook turns the course into tools you use every day: a research brief template, a personalized cold sequence, a proposal and objection playbook, and a CRM-note prompt. Work through one section per module, filling the worksheets and running the prompts in ChatGPT or Claude as you go. By the end you will have a complete, reusable prospecting workflow and a prompt library you can run on autopilot.

AI-Powered Lead and Account Research

Build the 10-minute research workflow and the verified brief every later exercise depends on.

Exercise: Run the 10-Minute Brief on a Real Account

Pick one real target account. Spend five minutes gathering the five inputs (buyer, company, trigger, pain hypothesis, prior contact) into a single note. Paste it into ChatGPT or Claude and run the research prompt with the 'use only what I paste' guardrail. Save the brief to your prompt library.

• Paste your five gathered inputs and ask for a one-page brief with buyer snapshot, company snapshot, likely top priority, one relevance hook, and three discovery questions.

• Instruct the model to write UNKNOWN for any missing fact and to add nothing that is not in your text.

• Take the relevance hook and rewrite it into a single cold-email opening sentence tied to a dated trigger.

Worksheet: Account Research Brief

Complete every field for your top account. Leave UNKNOWN where you have not verified a fact, then go find it before writing outreach. Reuse this template for each priority account.

Buyer name, title, and tenure

Recent LinkedIn post or activity (one line)

What the company sells and to whom

Company size or stage

Verified trigger event and date

Pain hypothesis for this role

Prior contact or CRM history

Relevance hook (one sentence)

Three discovery questions

Checklist: Research Setup Checklist

[ ] Choose one retrieval tool (Apollo, Perplexity, or LinkedIn Sales Navigator) and one AI assistant
[ ] Confirm you can pull verified emails and a trigger source for an account
[ ] Save your research prompt where you can reach it in one click
[ ] Decide a fit-times-signal scoring scale (1 to 5 each) for prioritizing lists
[ ] Set the rule: every fact in outreach must trace to a source or the CRM

Personalized Cold Outreach at Scale

Produce a reply-worthy cold email, a personalized layer, and a full multi-touch sequence.

Exercise: Draft One Cold Email Three Ways

Using your verified research brief, prompt AI to write the same cold email in three frameworks (3x3, Before-After-Bridge, PAS), each under 110 words with one low-friction CTA. Pick the strongest, add one human individual-layer sentence, and run an edit pass deleting anything true of every prospect.

• Write this cold email three ways using 3x3, BAB, and PAS; under 110 words each; one CTA each; no banned phrases.

• Give me three subject lines under 45 characters for the winning version.

• Now match the tone of these two sample emails I paste, in short direct sentences with no exclamation marks.

Worksheet: Personalization Layers Worksheet

Fill the three layers for one prospect. Use AI for the account and role layers; write the individual layer yourself and verify it. If you cannot fill the individual layer with something specific, the account is not ready for personalized outreach.

Account layer (industry, size, company-wide trigger)

Role layer (the pain specific to this title)

Individual layer (a verified, person-specific detail)

Your one-sentence relevance hook

Chosen CTA and its friction level (low, medium, high)

Banned phrases to keep out of this email

Worksheet: Sequence Planner

Map your seven-touch cadence before generating copy. Assign each touch a day, channel, and angle so AI never repeats itself. Then prompt the model to write all seven from this plan.

Touch 1 — day, channel, angle

Touch 2 — day, channel, angle

Touch 3 — day, channel, angle

Touch 4 — day, channel, angle

Touch 5 — day, channel, angle

Touch 6 — day, channel, angle

Touch 7 — day, channel, angle (breakup)

Checklist: Deliverability and Compliance Checklist

[ ] Each email has one CTA and is under roughly 110 words
[ ] No links or attachments in the first cold touch
[ ] Unsubscribe and physical address included where the law requires
[ ] Emails verified so bounce rate stays under about 2 to 3 percent
[ ] Daily cold-send volume capped (around 30 to 50 per inbox) and domain warmed
[ ] Rules checked for the prospect's country (CAN-SPAM, CASL, or GDPR)

Proposals, Discovery, and Objection Handling

Prep discovery, convert a call into a proposal and action plan, and rehearse objections.

Exercise: Build a Discovery Question Bank

For an upcoming or recent deal, prompt AI to generate ten SPIN questions ordered Situation to Need-payoff, plus the three things you most need to learn to qualify with MEDDIC. Trim to your best eight and pre-write the implication questions that turn a problem into a cost.

- Write 10 SPIN questions in order for a [title] at a [industry] company of [size]; problem solved is [problem].
- List the three MEDDIC items I most need to close before quoting this deal.
- Help me frame this stated pain as an annual cost using only the prospect's own numbers.

Exercise: Transcript to Proposal

Take a recorded discovery call (with consent) and run the proposal prompt restricted to transcript facts. Replace every [CONFIRM] flag with a verified detail. Then generate a one-page mutual action plan with steps, owners, and dates.

- Using only this transcript, draft a proposal: situation, goals, solution mapped to each goal, scope, investment, next steps.
- Quote the prospect's own phrasing for goals and pains; flag anything unconfirmed as [CONFIRM].
- Now produce a mutual action plan as a table of step, owner, and target date.

Worksheet: Objection Playbook

Write a LAARC response for each of the five common objections, tailored to your product and buyer. Keep each to three or four sentences, acknowledge before responding, and end with a forward-moving question. Edit AI output so it sounds like you.

Price objection — LAARC response

Status-quo objection — LAARC response

Timing objection — LAARC response

Authority objection — LAARC response

Trust objection — LAARC response plus one proof point

Your go-to forward-moving question

Checklist: Pre-Call Readiness Checklist

[ ] Best 8 discovery questions chosen and sequenced
[ ] Two pain-quantification examples ready to adapt live
[ ] MEDDIC gaps for this deal identified
[ ] Objection playbook rehearsed out loud with an AI buyer role-play
[ ] Recording consent confirmed for the prospect's jurisdiction

CRM Automation and Sane AI Selling

Standardize CRM notes, assemble your daily AI workflow, and lock in the trust-keeping rules.

Exercise: Generate a CRM Note in Your Fixed Format

Take a real call transcript or email thread and run the standard-note prompt with the 'write NONE' guardrail. Check the output for any invented next step or date before pasting into your CRM. Set the follow-up task the same day.

• Summarize this transcript into a CRM note with only: attendees, situation, pains, goals, objections, agreed next step with owner and date, MEDDIC gaps.

• Write NONE for any field with no information and add nothing not in the transcript.

• Draft the follow-up email referencing the agreed next step.

Worksheet: Daily AI Sales Routine

Design your repeatable day. Assign a time block to each stage and name the tool and prompt you will use. Keep AI work time-boxed so it speeds you up rather than becoming busywork.

Morning triage — tool and time block

Research block — accounts and prompt used

Outreach block — frameworks and sequence prompt

Live selling — calls recorded with which tool

Wrap-up — CRM-note prompt and verification step

Weekly metric to watch (reply rate, meetings, or time per touch)

Checklist: Trust and Compliance Checklist

[ ] Every fact, number, and quote verified before reaching a prospect
[ ] No customer reference or result claimed that the company cannot back up
[ ] Recording consent obtained where required
[ ] Prospect data only entered into company-approved tools
[ ] A final fact-and-tone pass run on anything AI wrote before sending

Your Action Plan

1. Pick one retrieval tool and one AI assistant, and run the 10-minute research brief on your top 5 accounts this week.
2. Score your current target list on fit times signal and choose the top 20 to 25 for deep personalization.
3. Build a personalized cold email in three frameworks, choose the winner, and add one human individual-layer sentence.
4. Generate a full seven-touch email-and-LinkedIn sequence from your sequence plan and load it into your sequencer.
5. Confirm deliverability basics: a separate cold domain, verified emails, a daily send cap, and the right anti-spam rules.
6. Create a discovery question bank with SPIN and identify your MEDDIC gaps for one live deal.
7. Convert one recorded discovery call into a proposal and a one-page mutual action plan.
8. Write and rehearse your five-objection LAARC playbook against an AI buyer role-play.
9. Standardize one CRM-note format and run the note prompt after every call this week.
10. Save your 8 to 10 best prompts and load your offer, voice, and ICP into a custom GPT or Claude Project.