# How to Build Your AI-Powered Sales Engine

**A tactical guide to using AI across your entire customer acquisition process.**

BY JERIMIAH LANCASTER

jerimiahlancaster.com

By now, someone has told you to use AI in your sales. Maybe you tried it. You pasted in a prompt, asked it to write the email or dig something up on an account, and what came back was fine. Generic, but fine. The kind of thing a buyer has already deleted twice this week. So you closed the tab and went back to doing it by hand.

The tool was never the problem. Almost no one has been shown how to point it at a real sales process, with the right instructions, at the right step. Used right, it changes what one person can get done in a day. The custom research and tailored outreach you used to save for your biggest deals, you can now do for every account, in minutes. This is the guide to doing that: the whole customer acquisition process, from working out who to sell to all the way through closing, with the exact prompt for each step and a real example of what comes back.

I have spent fifteen years building sales teams, and I have run these plays, or earlier versions of them, across a couple hundred companies. Everything here is something I actually use. None of it is theory.

This playbook has nine plays that will help you accelerate your sales motion and close more customers.

---

## 01

## ICP is everything

When you are just starting out and you're finding your first 50 customers, you sell to whoever will pay you. The referral, the guy who found you on Google, somebody's brother. It feels like hustle and it pays the bills, so you never stop to ask whether those customers are the right fit. A lot of them were not. If you lined up the handful that stuck around, paid on time, and did not grind you on price, they would have more in common than you would guess. You just never had a quiet hour to work out the pattern. Give that hour to a model instead. Take your five best customers, the ones you would clone if you could, and tell it everything you know about them.

THE PROMPT

```
You are my go-to-market analyst. Below are my five best customers. For each I have written what they do, how they found me, why they bought, and how happy they are now.

[paste 5 customers: company, size, industry, the problem they had, why they picked you, current status]

Find the pattern. Give me: 1. A one-paragraph ideal customer profile. Be specific. Industry, size, the trigger that makes them start looking, and the job title who feels the pain. 2. The three signals I can see from the outside that predict a good fit. 3. Two disqualifiers. The kind of customer who looks good but churns or haggles. 4. One sentence I could put on my website that would make the right buyer feel seen and make the wrong one leave. Do not flatter me. If my five best customers do not share a pattern, tell me that.
```

WHAT COMES BACK

Ideal customer profile: Owner-operated field-service businesses (HVAC, plumbing, electrical) doing $2M to $10M in revenue, 15 to 60 employees. They come looking right after they add a second location or a second crew, because the spreadsheet that ran one crew stops working at two. The person who feels it is the owner or the ops lead, not an IT buyer.

Outside signals that predict fit: (1) two or more locations listed on their site or Google Business, (2) actively hiring technicians (job posts mean they are scaling), (3) still publishing a personal cell as the booking number.

Disqualifiers: (1) Private-equity-owned regional roll-ups. They already have a system and a procurement process, and your two best wins that fit this were both slow and price-shopped. (2) Solo operators under $1M. They love the demo and never buy, because the spreadsheet still works for one crew.

Website line: "Built for the second truck, not the first."

Most of the result won't shock you. It is stuff you already knew in your gut, but there is something about seeing it written down that changes how you spend the week. Now you can go find more of the people you want to work with, and say No to the ones who are a bad fit. I have watched operators close a lot more without adding a single lead, just by getting choosier about who they chase.

---

# 02

## A short list beats a big list

Now you need more of them. This is where most operators go sideways. They buy a list of a thousand names and feel productive for an afternoon. A thousand names is not progress. It is a thousand ways to spend your week on people who were never going to buy. What you actually want is fifty of the right ones, ranked, so you know exactly who to call first. When I did this at scale I built the scoring on Postgres and Apollo. You do not need any of that. You need your ICP from the last play, a list you can pull from Apollo or Google Maps or an industry directory, and this.

THE PROMPT

```
Here is my ideal customer profile: [paste the ICP paragraph from Play 1].

I am going to paste a list of 50 companies I pulled from [Apollo / Google Maps / an industry directory]. For each, score fit 1 to 5 against my ICP and give a one-line reason. Then rank them. Put anything you would not waste a call on at the bottom and tell me why.

Columns I want back: Company, Fit score, Why, The one thing I should reference if I reach out.

[paste the 50 with whatever you have: name, city, size, website]
```

WHAT COMES BACK

1. Ridgeline Mechanical · Fit 5 · Two locations, hiring 3 techs now, owner cell on site. Reference: their new Denver location announced last month. 2. Summit Air & Heat · Fit 5 · $6M, 40 staff, just added commercial line. Reference: the commercial expansion, they will need scheduling for a different crew type. 3. Bractlett Plumbing · Fit 4 · Right size, single location, no growth signal yet. Reference: their 4.9 Google rating, lead with how you protect that under volume. ... 44. Apex Facilities Group · Fit 1 · PE-owned roll-up, 400 staff. Skip. Matches a disqualifier.

Now the week has a shape. You are not staring at fifty identical names wondering where to start. You work the top of the list down, and every name already has a reason to call sitting next to it. That last column, the one thing to reference, is what keeps your first line from reading like everybody else's. Which is the next play.

---

# 03

## Never walk in cold

You have a call at two. The usual move is to skim their website for four minutes right before and wing the rest. Buyers can always tell. You can hear it on the other end, the person who clearly opened your homepage in the elevator. The fix is to have a real brief in front of you, and now that takes about as long as refilling your coffee. Paste in whatever you have on them, their site, a couple of recent posts, a news item, and ask for this.

THE PROMPT

```
You are my research analyst. I sell [product] to [buyer]. Everything below is about
[company]: their website copy, their last two LinkedIn posts, and a recent news item.

[paste what you have]

Give me a one-page brief, five parts, no filler: 1. What they actually do, in two
sentences a normal person understands. 2. The three things their leadership is talking
about publicly right now, with the source for each. 3. Where my product plausibly
connects to one of those three. 4. Two reasons they might not be a fit, so I do not
waste the call. 5. The single sharpest question I could open with. If you are guessing
on any point, say so.
```

WHAT COMES BACK

What they do: A 30-truck plumbing and drain company across two metro areas. Residential and light commercial.

Talking about publicly: (1) Hiring hard, four open tech roles posted this month. (2) Owner posted about "growing pains" and dropped balls on scheduling. (3) Just won a "best of" local award and is leaning into reputation.

Where you connect: The scheduling complaint in the owner's own words is your opening. This is not a hypothetical pain. He posted it.

Might not fit: They mention an existing dispatch tool in a job description. You may be a rip-and-replace, which is a longer sale. Second, no online booking yet, so they may be earlier in digitizing than your best customers.

Open with: "You posted about dropping scheduling balls as you add trucks. Tell me what that looked like last week."

(Guessing flag: the existing dispatch tool is inferred from one job posting. Confirm on the call.)

The line at the bottom, where it flags what it is guessing, is the part I never skip. Left alone these things will hand you a guess dressed up as a fact, and then you are the one on the call who does not actually know what he is talking about. The open-with question is built out of the buyer's own words, so when you lead with it you sound like someone who did the work. Because you did. This is how I prep before every first call, and it is why my first meetings do not feel like first meetings.

---

# 04

## Outreach that doesn't get deleted

Every inbox is buried in AI outreach now. You know the kind. It has your name in it, it has your company in it, and it says absolutely nothing. Buyers delete it without reading past the first line. The funny part is that AI is also how you beat it, as long as you hand it something real instead of asking it to "personalize." One message built off the brief from the last play will do more than fifty templates ever did. Take the two lines from your brief, the connection and the opener, and give it this.

```
THE PROMPT

Write a cold email to [name], the owner of [company].

Context I actually know: [paste the "where you connect" and "open with" lines from the
Play 3 brief].

Rules:

- Under 90 words.

- First line is about them, not me. Reference the specific thing, not "I saw you're
  growing."

- One sentence on what I do, in plain language, tied to their situation.

- Ask for a 15-minute call, low pressure.

- No "I hope this finds you well." No "just circling back." No "leverage,"
  "solutions," or "synergies." Write like a person who has done this work emails
  another busy person.

Give me two versions with different first lines.
```

WHAT COMES BACK

Version A Subject: dropping scheduling balls

Mike, saw your post about balls getting dropped as you added the last two trucks. That specific problem, one crew's schedule bleeding into another's, is the thing we fix for plumbing shops your size. We keep dispatch clean so you are not the backstop at 7pm. Worth 15 minutes to see if it maps to your setup? Happy to work around your day.

Version B Subject: the second-metro problem

Mike, congrats on the second metro. That is usually the moment the whiteboard stops working and nobody warns you. We help field-service owners keep scheduling sane through exactly that jump. Fifteen minutes this week to compare notes, even if we are not a fit for you?

Say those out loud. They sound like a person wrote them to one other person, because they did. The whole thing turns on the first line. It could only have gone to Mike, because it came out of something Mike actually said. That is the test. If your first line could be dropped into a hundred other emails without changing a word, it is not there yet. Throw it out and start again.

---

# 05

## Stop pitching. Show them.

This is the one that changed how I sell, and it is the one AI cracked wide open. Years back I stopped pitching and started proving. Instead of talking at a buyer, I would build something for them first, a mockup, a rough plan, a model with their numbers in it, and open the meeting with that. It worked. The catch was it took hours, so I saved it for the deals big enough to justify the night. AI took the hours out. Now you can build the proof for every real opportunity, not just the whale.

A pitch asks the buyer to picture themselves using your product. A proof shows them. People are bad at picturing and good at recognizing, so when someone sees their own problem handled right in front of them, they stop grading your presentation and start fixing the thing with you.

For you this does not mean building software. It means a one-pager. A filled-in plan. A before-and-after with their real numbers in it. Something that says, I already did the first hour of this for you.

THE PROMPT

```
I have a call with [company]. Here is what I learned in discovery: [paste their situation, their numbers, what they said out loud].

Build me a one-page "here is what I would do for you" document I can walk them through. Structure:

– Their situation in two sentences, in their words, so they know I listened.

– The three moves I would make in their first 30 days on my product, specific to their business.

– A simple before/after with their own rough numbers plugged in.

– One risk and how we would handle it, so it does not read like a sales sheet.

Keep it to one page. Plain language. No feature lists.
```

WHAT COMES BACK

For Summit Air & Heat · a first 30 days

Where you are: You just added a commercial crew, and the residential schedule and the commercial schedule are colliding on the same board. Two dispatchers, one whiteboard, dropped jobs.

First 30 days:

– Week 1: Split the two crews into separate schedules that still roll up to one view for you.

– Week 2: Put your top 20 recurring commercial accounts on standing slots so they stop competing with residential emergencies.

– Week 3: Turn on the customer text confirmations so your office stops playing phone tag.

Before / after, your numbers: You said you run about 240 jobs a week and lose "a few" to scheduling each week. If that is 6 jobs at your ~$450 average, that is roughly $2,700 a week, about $140k a year, walking out the door. The goal of month one is to stop most of that.

Risk: Your dispatchers know the whiteboard cold and will resist a screen. We keep the whiteboard for week one and run both, so nobody is flying blind.

You open the laptop and say, before we get into the product, I put together what I would actually do for you, tell me where I got it wrong. Now the meeting is the two of you fixing that document together. One deal I ran exactly this way closed 57% of its demos. Nobody buys because your product is clever. They buy because, for once, somebody clearly understood their problem before the meeting even started.

# 06

## Get them to say the number

Weak discovery is why deals stall out. Most operators ask "so what are your pain points," get some mush back, and jump straight to the demo. Good discovery does one thing. It gets the buyer to say out loud, in their own words and ideally in dollars, what the problem is costing them. Once they have said the number, it is their number, and it shows up again later when they are talking themselves into the purchase. AI is a good sparring partner for building the questions that get you there. Before the call, run this.

THE PROMPT

```
I sell [product] to [buyer]. I have a discovery call with [company], a [size] business in [industry].

Give me a discovery flow, not a list. Group questions into: (1) their current situation, (2) what the problem is costing them in time or money, (3) what happens if they do nothing, (4) who else has to say yes. Under each, three questions phrased the way a curious peer would ask, not a form. Mark the one question in the whole set most likely to get them to name a dollar figure.
```

WHAT COMES BACK

Current situation

- Walk me through how a job goes from phone ringing to invoice today.
- Who touches the schedule, and what do they use?
- When did that setup start creaking?

What it costs

- When a job gets dropped, what does that actually cost you: the job, plus the callback, plus the reputation? <- the money question
- How many hours a week are you personally spending patching the schedule?
- What does a bad scheduling week do to your online reviews?

If nothing changes

- You are adding a third crew. What does this look like at that size?
- What has this cost you in the last year that you just absorbed?

Who says yes

- Besides you, who would need to be comfortable before you changed how the crews are scheduled?

See the one I had it flag, the money question. That is the one that turns "we should look into this someday" into a real deal, because the buyer is the one who put a dollar figure on it. You did not tell him it costs $140k a year. He told you. I trained 2,500 sellers on this over the years and it never changed. Whoever gets the buyer to put a number on the pain is usually the one who wins the deal.

---

# 07

## The follow-up is the deal

Deals die in the two days after the call, when the follow-up either never goes out or goes out generic. Record your calls, get consent first, and let the model turn the transcript into something that moves things forward. You get two things out of this, an email you can send and a private read on the deal for your eyes only.

THE PROMPT

```
Below is the transcript of my sales call with [company]. Write my follow-up email.

Rules:

- Open by reflecting back the one thing they care about most, in their words.

- Summarize what we agreed in three bullets.

- State the next step with a specific day and time I proposed.

- Flag one risk I heard on the call that I should get ahead of, and address it in a
  sentence.

- Keep it under 120 words. Sound like me: direct, no fluff, no "per our conversation."

Then, separately, give me a private list of the three things in this deal most likely
to kill it, so I know what to watch.

[paste transcript]
```

WHAT COMES BACK

Email: Mike, the thing that stuck with me: you are the backstop every time a job slips, and that is not sustainable through a third crew. Quick recap of where we landed: (1) split residential and commercial schedules, one view for you; (2) standing slots for your top commercial accounts; (3) text confirmations to kill the phone tag. Next step is the working session Thursday at 8am before your crews roll. On cost, I know the last tool you tried was a pain to roll out, so I will bring a one-page rollout plan that keeps your whiteboard live for week one.

Watch list (private): 1. The dispatchers are the real buyers. If they hate it, this dies. Get them in the Thursday session. 2. He said "after the busy season." That is a stall risk. Tie the value to the busy season, not after it. 3. No budget number said out loud yet. You are guessing he can spend. Confirm before you build a proposal.

The email keeps it warm and specific, which is most of the job. But the watch list is the part you would never do for yourself, because thirty seconds after a call you are already onto the next fire. That is the sales manager you do not have, telling you where the deal is soft while it is all still fresh in the transcript. Read it before you do anything else.

---

# 08

## Get honest about your pipeline

Left to your own devices, your pipeline quietly fills up with deals you feel bad about, the ones you keep nudging that are never going to close. Nobody is going to call them dead for you, not honestly. So once a week, hand the model your deals and tell it to be the blunt sales manager who will.

THE PROMPT

```
Here is my pipeline. For each deal: company, dollar value, the last real thing that
happened, and the date it happened.

[paste your deals]

Act as a skeptical VP of Sales reviewing me. For each deal tell me: is it real or am I
hoping? What is the single next action that would move it, and by when? Then tell me
which two deals I am neglecting that deserve more of my week, and which two I am
clinging to that I should let go. Be blunt. I would rather lose the fantasy now than at
the end of the month.
```

WHAT COMES BACK

Ridgeline Mechanical · $18k/yr · Real. Proposal out 3 days ago, no reply. Next: call, do not email, by tomorrow. Silence after a proposal is usually a stall, not a no.

Summit Air · $30k/yr · Real, and your best deal. Working session booked. Next: get the dispatchers in that room or it stalls after.

Bractlett Plumbing · $9k/yr · Hoping. "Checking in" three times with no new information. You are managing your own guilt, not a deal. Next: one direct email asking if the timing is real. If no, drop it.

Neglecting: Summit and Ridgeline deserve most of your week. Both are real and both are close. Clinging: Bractlett and the June demo that never re-engaged. Let them go and take the hours back.

What you are really buying here is permission to stop kidding yourself. Operators hang onto dead deals because deleting one feels like admitting you lost. An outside read gives you the shove. I sat in weekly forecast calls on teams closing 250 to 300 deals a month, and honestly the whole job was separating the real from the hoped-for. You can run that same discipline on yourself in ten minutes on a Friday.

---

# 09

## Show up before you reach out

People look you up before they reply. When you are the one running the business, having a point of view out in the world is how a stranger warms up to you before you have even said hello. You do not have to be a writer. You need one real opinion and a way to get more mileage out of it. I built a whole content system on Claude, but the core move is simple. Take something you actually believe, typed out rough, and hand it over.

THE PROMPT

```
Here is a raw thought I have about my industry, unpolished: [paste 3 or 4 messy sentences of something you actually believe].

Turn it into a week of content in my voice: direct, specific, no jargon, first person, short sentences. Give me:

– One LinkedIn post, under 150 words, that makes the point with a specific example.

– Three shorter one-or-two-line posts pulled from the same idea.

– One question I could ask my audience that would get people like me to reply.

Do not make it sound like marketing. Make it sound like an operator saying a true thing.
```

WHAT COMES BACK

LinkedIn post: Most field-service owners think they have a lead problem. They have a scheduling problem. Last week a plumbing owner told me he was buying more Google ads because revenue was flat. I asked how many jobs he dropped last month to bad scheduling. He did not know. We counted. It was 24. At his average ticket that is more than the ads would ever bring in. The leak was not at the top of the funnel. It was in the middle, where nobody was looking. Fix the leak before you pour in more water.

Short posts:

– You do not have a lead problem. You have a "what happens after the phone rings" problem.

– The second truck breaks the whiteboard. Nobody warns you.

– More ads will not fix a scheduling leak. You are pouring water into a bucket with a hole.

Question for your audience: Owners: what broke first when you added your second crew?

That post is not marketing. It is a true story with a number in it. And it does quiet work for you. When you finally email that owner from Play 4, you are not a total stranger anymore, because he has already seen you say something that rang true. One real thing a week, chopped into a few posts, and in a few months you are a known name in your corner of the market.

---

## Tech Stack

You do not need fifteen tools. You need a few that work together, and what they are called matters less than the job each one does. Here is what I would run.

- A CRM, or one clean spreadsheet if you are early. Somewhere your customers actually live, one place, updated after every call. A model cannot help you with a pipeline that lives in your head. I like HubSpot or Attio.
- One AI model you actually learn. This is the engine under every play in here. Knowing one well beats poking at five. Claude or OpenAI.
- An AI note taker that sits on your calls and hands you the transcript. This is what makes Play 7 work. Granola or Fireflies. Get consent, then record everything.
- A way to find and enrich accounts, for pulling your list in Play 2 and the raw material for your briefs in Play 3. Apollo is the workhorse here.
- Something simple to send and track outreach. Even sent mail plus a reminder to follow up beats running on memory.

Start with the CRM and one model. Add the rest as the plays you are running need them. A tool you do not use is not a tool. It is another subscription.

---

## AI can't build the relationship

None of this is a shortcut for building relationships. It is a shortcut for everything around them, so you get the hours back for the part that actually closes deals. Keep that straight and the tools work for you. Forget it and you automate your way into sounding like everybody else.

AI can draft the email. It cannot build the trust. People buy from a person, and at your size you are the person.

It can prep your discovery questions. It cannot sit in the chair and catch the thing a buyer almost said and then thought better of. That read is on you.

It can write you a clean follow-up. It cannot hear when that follow-up sounds like a robot. So read everything out loud before it goes, every time, because the second a buyer smells automation the trust is gone.

It can tell you a deal is a fantasy. It cannot make the hard call that comes next, the price pushback, the stalled deal, the customer who is unhappy. Those happen in your voice, on the phone or in person.

Hand it the work that was never really selling. Keep the selling for yourself.

---

## Your first 30 days

Do not try to run all nine of these next week. You will burn out by Friday and quit. Layer them in.

Week one, get clear. Run Play 1 and write your ICP. Run Play 2 on a list of fifty. Now you know who you are after and in what order. Nothing else changes yet.

Week two, show up ready. Before every single call, run the Play 3 brief. That is the only new thing. Be the most prepared person in every meeting for a week and watch what happens to your calls.

Week three, reach out and prove. Add the Play 4 outreach, and build one Play 5 document for your best live deal. Walk a buyer through something you made just for them.

Week four, tighten it up. Follow up with Play 7 after every call, and give yourself the Play 8 pipeline review every Friday. Post one thing from Play 9.

By the end of the month you are not working more hours. You are just the operator who shows up more prepared, follows up faster, and only chases the deals that are actually real. That is the whole thing. Not some robot that sells for you while you sleep. Just you, finally able to do what a whole sales team used to.

---

I write about this every week in *The Art of Sales*. If this was useful, that is where the rest of it lives. Come find me at jerimiahlancaster.com.

Jerimiah