

ISSUE 36

April 2025



CUSTOMER ACUMEN

**INSIGHTS TO BUILD
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EDITORIAL



Dear Reader,

In today's hyper-competitive business environment, the integration of AI in sales and marketing isn't just a trend - it is a tectonic shift. AI is fundamentally reshaping how organizations understand their customers, personalize outreach, and drive meaningful engagement across touchpoints.

From intelligent lead scoring and real-time customer insights to hyper-personalized campaigns and AI-powered chatbots that never sleep - AI impacts every stage of the customer journey. For sales teams, it means focusing energy on high-conversion leads and automating routine tasks, freeing up time for what truly matters: relationship-building. For marketers, it means crafting messages that resonate at a personal level - at scale.

But the true transformation lies beyond the tools - it is in how AI is changing mindsets. Companies that embrace AI not only accelerate growth but also build smarter, more responsive ecosystems that are continuously learning and adapting. One thing is clear: the future of customer engagement is intelligent, agile, and deeply data-driven. The question is no longer if your business should adopt AI, but how soon you can start.

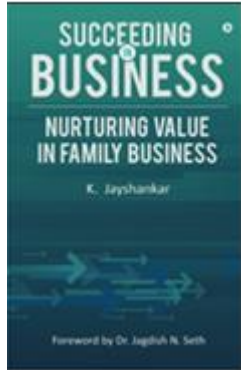
This quarter in Customer Acumen, we dive deep into the theme: "**The Transformative Power of AI in Sales and Marketing.**"

Jay's emphasizes that while Generative AI offers powerful tools to enhance efficiency in sales - from prospecting to admin automation - its true value lies in enabling emotionally intelligent, trust-based customer relationships, reminding businesses to prioritize effectiveness over mere efficiency. In the **Spotlight** section, **Uday Kothari** - Co-Chair, Tie Pune Angels, Serial Entrepreneur, & Angel Investor explores how AI can revolutionize sales and marketing by enabling hyper-personalization, predictive analytics, automation, and real-time insights - while cautioning businesses about data quality, legacy systems, and cultural resistance and advocates a clear, incremental, and people-inclusive approach to AI adoption to ensure success and long-term impact. We review **The AI Edge** by Jeb Blount who offers a practical, hands-on guide to integrating AI into the sales process, helping professionals save time, boost productivity, and deepen customer relationships by combining cutting-edge technology with human creativity, empathy, and authenticity.

Our in-house Cartoonist, **Vikram Nandwani's** toon shows how AI adds the personal touch that seals the deal!



Customer Acumen thanks you for being part of our journey. We welcome your thoughts and feedback as we continue to explore what it means to build deeper, more human customer connections in an increasingly digital world.



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MUSINGS

AI in Sales Interactions - Armed and Ready to Fire but ... - Jay



Artificial Intelligence (AI) is now a part of every business conversation. It was on the boundaries of the business world for nearly a decade with futurists touting its potential and without us realizing it, over the last two years it has crept into our organization and became known when Sam Altman of OpenAI announced the power of ChatGPT. Suddenly, businesses could not get enough of it - and the allure of Generative AI (GenAI) has now galvanized leaders into exploring how it can be harnessed inside the organization.

Beyond the hype - and the associated worry - about the power of this shiny new tool, is the lack of understanding of how it can actually be deployed in a firm. Is it for large firms? Can small and medium firms find it useful? And, if so, how? These questions are being debated everywhere and offers a new revenue stream for consultants who can study the innards of an organization and recommend appropriate deployment to streamline functions and generate efficiencies. But that is only first level of implementation.

The promise of GenAI is truly realized when it becomes a smart aide to you, or as envisaged by Microsoft, a co-pilot who will help you steer to reach your profit destination, safely and faster.

An avenue to truly exploit the power of GenAI is Sales. Selling was last reinvented when laptops and tablets became handy devices to demonstrate product features at customer sites through nifty presentations (both video and more) to replace the traditional conversational style of selling. After all, seeing is believing for most of us, and attractive visuals are more convincing than empty words. Trouble is that many in the sales profession forget that a presentation is an aid, a tool - not a replacement to the person. Knowing when to use the instrument is vital and only a skillful salesperson can leverage this opportunity provided by a prospect to convert her into a customer.

The challenge is far more if the context of the sales game is more complex, with greater degrees of number crunching and scenario planning involved. Let us examine how GenAI can play a part in such a dynamic world. To begin any sales process, the first step is generating the right list of prospects. GenAI can not only be used to map out prospects in existing markets but can also come up

with new possibilities in hitherto unexplored areas, sometimes unmined due to challenges that were considered insurmountable. Complex data can be crunched and simple options generated by AI can be followed by tutoring the sales professional on how to create breakthroughs in such uncharted waters. Further, initial contact could be generated through both voice and word using AI, to overcome the hesitation of a human agent.

Two other aspects come readily to mind. The biggest bugbear for many salespersons is the associated paperwork and administrative tasks that are but natural in any job. AI offers a solution here: generate efficiency by taking away the drudgery that often results in delays and errors in documentation that triggers conflicts with both internal stakeholders and external customers. With this routine aspect minimized (or eliminated, where possible), the sales professional gets the gift of time - a second benefit - which she can use productively for value creation for the firm: building trust and a powerful bond with the firm. This is invaluable as the true skill of the sales professional is to use emotionally intelligent interactions to know what the genuine concern of the customer is - and what could be the future of the relationship that is being created through the present interactions. Companies detest surprises that result in lost business. Authentic rapport with customers prevents the pitfalls that are not unusual in long-term business association.

Consider also a counterintuitive point that is relevant here: with so much of AI generated activity, the personal touch is missing, and this is what customers seek - a genuine relationship that cannot be substituted by process efficient machines. Freeing the sales professional and empowering her to build bridges in this manner is therefore priceless.

The key message to remember is that while firms are arming themselves with AI tools to generate efficiency, consider the effectiveness dimension too. Is it bringing you closer to the customer? If not, study how to do that first. Caution must be the watchword before you fire away with your shiny new toys.

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SPOTLIGHT

Uday Kothari

Co-Chair, Tie Pune Angels, Serial Entrepreneur,
& Angel Investor



Uday Kothari has been a part of the IT industry for over 35 years, with experience spanning both domestic and international markets. He graduated from the Department of Electronics at the University of Pune in 1983 and began his professional journey at the R&D centre of ICIM, now known as Zensar Technologies. Over the years, he went on to work with organizations such as Zenith Computers, Digital Equipment Corporation, and Key Information Technologies in Dubai, undertaking various roles and responsibilities. During his professional journey, he continued his academic pursuits and earned master's degrees in both Computer Science and Business Management.

In 1993, Uday co-founded Compulink Systems along with his long-time friend Vishwas Mahajan, starting in a 300 sq. ft. garage with just one PC and a capital of Rs. 25,000. Initially focused on providing innovative IT solutions to customers in India and abroad, Compulink became a Private Limited Company in 1996. In the year 2000, the company ventured into the less-travelled path of building its own software products - an uncommon move for Indian IT companies at the time. This led to the development of "ProjectByNet", a product that quickly gained popularity in the IT industry for its capabilities in Project Management, Process Management, and Quality Management. It was later rebranded as "Whizible", signifying the "visibility" it brought to project execution for organizations.

Today, Whizible is used by more than 250 organizations across 10 countries, with over 350,000 users. Uday conceptualized, architected, designed, and developed Whizible and the broader product suite at Compulink. Under his leadership, Compulink transitioned through various stages of growth and funding, eventually becoming one of the few Indian software companies to be publicly listed, achieving this milestone in 2005.

Over the years, Compulink and its products have received numerous prestigious recognitions. These include winning the "Technical Innovation" and "Sales & Marketing" awards at the Microsoft Worldwide Partner Conference, being nominated as a finalist for Microsoft's 'Partner of the Year' award, and being chosen by NASSCOM as one of the innovative players in their IT Innovation in India Quest. Whizible PBN became the first "Enterprise Project & Process Automation" product to receive "NSTL Tested" certification in India, and it also won the CSI-Wipro Award for the Best Packaged Application.

In 2009, Compulink announced its merger with Glodyne Technoserve Ltd., successfully completing the process in 2010. This journey gave Uday hands-on experience in starting, growing, and successfully merging an enterprise. At Compulink, he served as Chairman of the Board and Chief Technology Officer. His strengths lie in managing large-scale projects, conceptualizing product visions, building business models, and bringing organizational clarity and discipline to the execution of complex programs.

Uday is also a U.S. patent holder in XBRL (Extended Business Reporting Language) technologies. XBRL is now widely used in financial reporting across many countries. In India, all publicly listed companies on the NSE and BSE, as well as private companies with turnover above ₹ 9100 crore, are required to file their quarterly and annual reports with the Registrar of Companies (RoC) in XBRL format.

Beyond his corporate contributions, Uday is a Charter Member of the Pune Chapter of TiE (The Indus Entrepreneurs) and has been mentoring young entrepreneurs and start-ups for over a decade. In 2018, TiE Pune formed an Angel Investment Group to provide seed and angel funding to promising early-stage ventures. Uday currently serves as the Chair of this group, playing a pivotal role in guiding its investment strategy.

After exiting Compulink post-merger, Uday began investing in and supporting a number of start-ups. He remains actively involved in mentoring, strategic advisory, and business development. He also consults with companies on emerging technologies such as Block chain and Artificial Intelligence, helping them identify ways to leverage these technologies for business advantage

CA. How can AI transform organizations, especially in the revenue arm of Sales and Marketing?

UK:

- **Personalization at Scale:** AI can analyse vast amounts of customer data to create hyper-personalized marketing messages and sales outreach, ensuring that each customer receives content and offers that resonate with their unique needs. In case of B2C, personalization can be based on Age, Gender, Location, past purchase history, Products added in the cart but not purchased etc. In case of B2B business, marketing message can be personalized based on Industry, Company size (Annual Revenue), number of employees, role in the organization like CXO, geography, etc.

- **Predictive Analytics & Lead Scoring:** Machine learning models can forecast customer behaviour and identify high-value leads, enabling sales teams to focus their efforts where they're most likely to convert. AI or GenAI can be used to research each prospective customer and map it to organization ICP (Ideal Customer Profile). Specially in B2B Tech companies, sending high quality content such as case studies, blogs, articles on LinkedIn and tracking metrics such as visits to product websites, legal docs, price page, multiple website visits, visits on documentation pages, demo videos etc. are analysed by AI applications so that organization sales team can focus on only high scoring leads to reduce sales cycle and improve hit ratio.
- **Automation of Routine Tasks:** From automating follow-up emails and scheduling meetings to handling basic customer inquiries via chatbots, AI liberates sales teams to concentrate on high-impact activities. Salesforce, HubSpot and many point solutions by AI focused start-ups can do it using recent development in Agentic AI. Writing proposals, summarise and review proposals, contracts, purchase agreements etc. can be easily done using GenAI solutions.
- **Enhanced Decision-Making:** By integrating data from multiple sources, AI provides real-time insights and dashboards, empowering teams to make informed decisions about campaign adjustments, territory planning, and more.
- **Improved Customer Engagement:** AI-driven chatbots and virtual assistants can provide immediate, round-the-clock responses, ensuring consistent customer engagement and nurturing prospects through the funnel.

CA. Can you give us specific examples - both in large firms and start-ups - who are using AI in B2B sales and service relationships?

UK:

- Tata Consumer has built a next-generation sales and distribution engine called 'MAVIC' using Salesforce CRM and AI solutions, with this automation, Tata Consumer is managing 12,000+ Distributors, 8,000+ company sales reps, 1.6M retail outlets and over 6M transactions per month.
- IndiGo uses for customer service an AI powered solution to automate case prioritisation, while also empowering agents with next best action recommendations, case summaries, and knowledge articles. This will help them reduce average handle time (AHT). The airline has also built a customer-facing AI chatbot (6Eskai) on a different platform to provide quick answers to routine travel queries. The goal is to make service as autonomous as possible.
- Prakritik Lifestyle ([Home - Prakritik Lifestyles](#)) Pune based small Health ecommerce site use GenAI based Chatbot (Angel) to engage with visitors that can answer questions on many health related issues.
- I have developed dashboards for a SaaS Product company to analyse customer support ticket data over 12 years to identify Quality of Support by a Customer Support Engineer so that organisation can focus on low quality score and improve their customer experience.

CA. What are some challenges businesses face when integrating AI into their sales and marketing processes? And, how can companies ensure their sales teams adapt to AI-driven tools instead of resisting them?

UK:

- **Challenges:**
 - **Data Quality & Integration:** AI systems are only as good as the data fed into them. Inconsistent or siloed data can lead to inaccurate insights. As cited above, I found that there is very little or no BoK (Body of Knowledge, e.g. answers to How do I ..? Where do I find..? Tips & Tricks of product usage etc.) captured in the responses given by support engineers therefore initial objective of answering customer queries using AI enabled Chatbot didn't work and we had to pivot to use data for other applications. In some other cases, I found that SOPs (Standard Operating Procedures) for Sales & Support processes had lots of images which makes it difficult if not impossible to have meaningful data for AI Model training.
 - **Legacy Systems:** Integrating new AI tools with existing CRM and marketing platforms can be technically challenging and expensive.
 - **Cultural Resistance:** Sales teams may fear that AI will replace their roles or undervalue their expertise. Organizations which are going to undertake Digital Transformation needs to have Cross functional teams, training and awareness. We need to remove fear factor from the team and rather promote philosophy of AI is not going replace you but people who do not embrace AI.
 - **Expectation Management:** Unrealistic expectations about the immediate ROI of AI initiatives can lead to disillusionment if results aren't instant. In fact, many issues related to quality of data, right choice of tools and technology are surfaced much later in the journey therefore AI related initiatives is not a quick solution or silver bullet. It can take longer to see ROI and all stakeholders including top management expectations need to be set in advance. What process are organization optimizing? Are you targeting accuracy, speed, or cost reduction? Set specific and realistic success metrics before POC.
- **Ensuring Adaptation:**
 - **Education & Training:** Offer comprehensive training to demonstrate how AI augments their capabilities rather than replaces them.
 - **Pilot Projects:** Start with small, manageable projects to showcase quick wins and build confidence.
 - **Involve the Team Early:** Engage sales teams in the selection and implementation process so they feel ownership and understand the benefits.
 - **Change Management:** Communicate clearly about how AI tools will support them, emphasizing that technology is there to handle repetitive tasks, freeing up more time for strategic selling.

CA. What are the pitfalls and risks of using AI-driven tools for customer interactions?

UK:

- **Lack of Genuine Personalization:** Over-reliance on AI might result in interactions that feel robotic if the tools aren't properly tuned to individual customer contexts.
- **Data Privacy & Security:** Mishandling sensitive customer data or using biased algorithms can lead to compliance issues and erosion of customer trust. We need to ensure that any Personal Data is not shared with Public AI tools such as ChatGPT as it can be used for model training, instead fine-tuned SLM (Small Language Models) can be used which are either hosted on premise or on company private cloud. Before going live, enough testing using comprehensive test data set is recommended. One can generate synthetic data using AI to test the application instead of live data.
- **Over-Automation:** Excessive automation can depersonalize the customer experience, especially in complex B2B relationships where human touch is crucial.
- **Miscommunication:** AI chatbots or virtual assistants might misinterpret customer queries or provide inaccurate responses, leading to frustration. By giving appropriate context and prompt engineering, one can ensure that user queries are answered within the scope of application domain and context. Anything that is outside the scope of application domain, AI solution should give generic response such as contact human rep.
- **Transparency and Accountability:** Customers and even internal stakeholders may demand clarity on how decisions are made by AI, necessitating explainable and transparent AI models. Recent advancement in Ai reasoning model can give how it has arrived at the solution step by step, COT (Chain of Thought) prompting is now built into AI models.

CA. What would be your advice to companies looking to leverage AI in sales and marketing but unsure where to start?

UK:

- **Define Clear Objectives:** Identify specific pain points or opportunitiesb such as lead qualification, customer segmentation, or engagementtb that AI can address.
- **Start Small with Pilot Projects:** Begin with a pilot that targets a narrow use case, measure the impact, and refine the approach before scaling up.
- **Ensure Data Readiness:** Invest time in cleaning, integrating, and standardizing your data. Quality data is essential for effective AI.
- **Engage Stakeholders Early:** Involve sales and marketing teams in the planning process to secure buy-in and ensure that the tools meet their real-world needs.
- **Choose the Right Technology Partners:** Work with vendors or consultants who understand both AI technology and your industry's nuances.

- **Invest in Training & Change Management:** Prepare your teams with the skills and knowledge needed to leverage AI tools effectively, ensuring they see these tools as allies rather than replacements.

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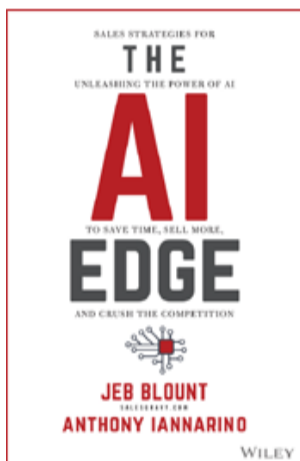


RESOURCES



The AI Edge

- Jeb Blount



Unleashing the Power of AI in Sales is more than just a timely read—it's an essential playbook for any sales professional navigating the rapidly shifting landscape of AI integration. At a time when automation seems poised to take over every function, this book reminds us that the ultimate sales advantage remains deeply, unmistakably human.

Far from being another dense, tech-heavy manual, the book takes a refreshing, grounded approach. It doesn't bombard readers with jargon or overwhelm with tool overload. Instead, it meets sales professionals' right where they are - curious, uncertain, and maybe even sceptical - offering a framework to evaluate where AI fits and where it doesn't. It is a guide not just to understanding AI, but to wielding it intelligently.

The author - Jeb Blount - brings an unmatched depth of real-world experience to this subject. He captures a powerful realization early on: AI is not a temporary trend - it's a seismic shift, comparable to the arrival of the Internet or the printing press. Sales professionals can no longer afford to remain passive observers. As the book deftly outlines, AI will either displace you, control you, or enhance you. Choosing enhancement is not just smart; it's imperative.

By breaking down AI's role in modern sales - streamlining prospecting, surfacing buying signals, and organizing sequences - the book highlights what AI is great at: the heavy lifting. But it doesn't stop there. It underscores that the true magic of sales - building rapport, earning trust, navigating emotion - remains firmly human territory. This duality is at the heart of the book's message: AI should accelerate your ability to connect, not replace your need to do so.

Among its most practical contributions is the introduction of the "Three A's" - Adopt, Adapt, and Become Adept - which frame how professionals should engage with new tools. The book also refreshingly expands on what intelligence means today, emphasizing not just IQ and EQ, but also AQ (acquired knowledge) and TQ (technology fluency). Success, it argues, is now a fusion

of smart machines and emotionally intelligent humans working in harmony - with the human always steering the ship.

The narrative also includes cautionary tales that ground the enthusiasm. For example, a lawyer who blindly used AI to write a legal brief found himself at the center of a reputational disaster. These stories serve as reminders that AI, while powerful, still requires human oversight. One key rule repeated throughout is simple but vital: never trust, always verify. A standout chapter focuses on AI-assisted writing - one of the most visible intersections of automation and authenticity. Through the story of a tech CEO whose article was ghostwritten entirely by ChatGPT, the authors underscore a painful but real lesson: people can sense robotic writing, and it erodes trust. Instead, they urge sellers to use AI to support - not substitute - their voice. Grammar and structure may be enhanced by machines, but emotional nuance, tone, and creativity remain the human domain.

The book is filled with tangible advice: use AI for summarizing, editing, and idea generation - but always edit with your own voice in mind. Beware of robotic jargon. Train AI to understand your writing style. And most importantly, strengthen your fundamentals - grammar, sentence structure, tone - so that your human input remains the most valuable asset in the process.

Throughout, the author reframes productivity through the lens of "Me Management." AI can save you time, but only you can decide how to use it wisely. By championing the protection of "Golden Hours" and encouraging time-blocking and focused effort, the book offers timeless advice amplified for a modern era.

In prospecting too, the message is clear: automation helps, but connection closes. The best sellers balance synchronous, real-time engagement with asynchronous touch points like email and video. AI can guide you to the right ICP, suggest the best cadences, and analyse conversion patterns - but it can't have the conversation for you. It can't listen or care. That remains your job.

Ultimately, *Unleashing the Power of AI in Sales* delivers a timely wake-up call and an empowering blueprint. AI isn't the threat - it's the tool. But how you use it, and how much of yourself you keep in the process, will determine whether you survive - or thrive - in the AI era. In sales, as in life, the human touch still wins.

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