COURSE SYLLABUS

AI for Sales Professionals

Craft a personalized Claude workflow that sharpens your edge at every stage of the sales cycle, from digging into prospect research and pulling together materials to advancing deals with greater speed and precision.

For more information, visit
https://www.creativelive.com/classes/ai-for-sales-professionals



Course Outline

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Module 1: Getting Started with Claude AI

- Explain how Claude works in plain language and identify the model tiers, plans, and interface
- Understand the context window, how Claude processes information, and when to start new conversations
- Practice your first Claude conversation using a sales-specific prompt
- Identify what Claude does well, what it doesn't, and when human judgment is essential

Module 2: Prompting Fundamentals

- Apply the five-part prompt framework: context, task, format, constraints, and examples
- Write effective prompts across five use cases: writing, summarization, analysis, research, and creative problem-solving
- Recognize and fix common prompting mistakes that produce vague or unusable output
- Practice prompting with sales scenarios: drafting a prospect follow-up email, summarizing an RFP, and writing a discovery call prep brief

Module 3: Working with Files & Documents

- Upload and analyze images, PDFs, spreadsheets, and documents directly in Claude
- Use Claude to extract, compare, and summarize information from uploaded files
- Work with sales-specific file types: RFPs, proposals, pipeline exports, CRM screenshots, and competitive intelligence reports
- Complete a hands-on file analysis exercise using provided sales sample documents

Module 4: Projects & Knowledge Bases

- Explain how Projects use custom instructions and knowledge bases to organize ongoing work
- Write effective Project instructions that encode your role, audience, format preferences, and rules
- Upload reference documents and understand how RAG retrieves relevant content
- Create a sales Project for a major deal pursuit using your company's solution one-pager, a prospect brief, and a sample proposal

Module 5: Artifacts, Styles, Memory & Usage Management

- Create reusable deliverables with Artifacts and edit them directly or through conversation
- Build custom Styles that match your professional communication voice
- Configure Memory to retain key context about you and your work across conversations

- Apply usage management techniques to extend your plan value

Module 6: Advanced Prompting & AI Tool Selection

- Use role-based prompting, chain-of-thought reasoning, and multi-step workflows
- Apply Extended Thinking, web search, and the You Ask Me technique for complex tasks
- Compare Claude with ChatGPT, Copilot, and Gemini to choose the right tool for each task
- Practice advanced prompting with sales scenarios: diagnosing a stalled deal, building a multi-touch outreach sequence, and preparing for a negotiation

Module 7: Introduction to Claude Cowork

- Explain what Cowork is and how it differs from the claude.ai chat interface
- Read, write, and manage files from your desktop environment
- Configure guardrails, file permissions, and network settings for safe use
- Understand prompt injection risks and how to protect against them

Module 8: Context System, Connectors & Integrations

- Build foundational context files and set Global Instructions that apply to every Cowork session
- Connect Claude to Slack, Google Drive, Gmail, and other workplace tools
- Use Claude natively in Excel and PowerPoint with the Office add-ins
- Configure your context system and connections for sales workflows, including pipeline analysis in Excel and deal presentations in PowerPoint

Module 9: AI for Sales — Core Workflows

- Use Claude and web search to produce one-page prospect research briefs with company overview, recent news, likely pain points, and conversation starters
- Draft customized proposals and RFP responses using your solution documentation and the prospect’s stated requirements
- Build objection-handling scripts with evidence-based responses and competitive positioning against key rivals
- Analyze a pipeline export to identify at-risk deals, stalled opportunities, and priority actions for the week
- Complete a hands-on lab producing a multi-document sales content package

Module 10: Capstone — Build Your Sales Claude System

- Audit your sales tasks and identify the highest-value opportunities for Claude assistance
- Configure a personalized sales Claude system: Projects, context files, Styles, and connected tools
- Run a complete end-to-end deal pursuit workflow: prospect brief, customized proposal, competitive positioning document, and a three-email follow-up sequence
- Create a Week 1 action plan for applying what you’ve learned to your sales role