COURSE SYLLABUS

AI for Sales Professionals (Self-Paced)

Bring an AI assistant into the sales work you already do, from account research and outreach to meeting prep, stalled deals and pipeline forecasts, while the calls that matter stay with you.

> Group classes (Live Online) and onsite training are available for this course. For more information, email onsite@graduateschool.edu or visit: https://www.graduateschool.edu/courses/ai-for-sales-professionals-self-paced



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Course Outline

Module 1: Your sales workflow and the course evidence trail

- Choose a task that already belongs to your role
- Follow the five submissions and six experiences
- Establish a baseline you can compare
- Read the assessment and get ready to practice

Module 2: Data boundaries, source quality and human approval

- Use the smallest approved input
- Rank sources and handle contradictions
- Keep contact and commercial decisions human
- Build a pre-use approval checklist

Module 3: Task framing and your first sales workspace

- Frame a task and configure your sales workspace
- Transfer files and verify the received evidence
- Revise a failed prompt without losing accepted facts
- Verify a workspace result before downstream reuse

Module 4: Verified account research and discovery hypotheses

- Extract a fact set before writing a story
- Turn inference into a testable discovery question
- Construct the one-page account brief
- Challenge the brief before it drives outreach

Module 5: Personalized outreach and proposal-support drafts

- Personalize from relevant business evidence
- Sequence a plan without automating contact
- Support a proposal without inventing a business case

- Submit the combined research and outreach project

Module 6: Meeting preparation, discovery and meeting-to-actions

- Prepare a meeting around gaps in evidence
- Extract decisions, requests and open questions separately
- Create a follow-up that preserves dependencies
- Submit the meeting package with a correction trail

Module 7: Stalled-deal analysis and a bounded rescue plan

- Distinguish slow progress from missing evidence
- Generate alternatives without making concessions
- Prioritize across accounts with transparent criteria
- Submit the rescue analysis and escalation note

Module 8: Pipeline data quality and reproducible arithmetic

- Define the snapshot and population before totaling
- Calculate known and weighted open values
- Apply risk rules without filling blanks
- Audit a convincing but wrong pipeline summary

Module 9: Forecast commentary and decision-ready interpretation

- Keep forecast buckets distinct
- Write a narrative around checked numbers
- Handle an update without rewriting history
- Submit the pipeline and forecast narrative project

Module 10: Your AI sales workspace

- Build a tested prompt library in your sales workspace
- Design workspace templates that preserve uncertainty
- Package the workspace for a colleague to verify
- Maintain and retest the sales workspace

Module 11: AI error detection, feedback and professional judgment

- Classify the failure before fixing the prose
- Give feedback a colleague can act on
- Use professional judgment when the evidence is incomplete
- Run a full release check on one account pack

Module 12: Human-AI workflow design and accessible alternatives

- Map a repeatable workflow with clear handoffs
- Observe advanced automation without building it
- Use fallback paths without lowering the assessment
- Run your workflow on a week of new requests

Module 13: Integrated account pursuit and quarterly review capstone

- Re-scope the account using the update pack
- Assemble the integrated pursuit and review artifacts
- Challenge the complete pack and revise
- Present the handoff and document responsible reuse