

MERCANTILE

AI Playbook for

# Sales Organizations.

You've heard the hype. This is what actually works. A tactical guide to cutting admin, shortening cycles, and closing more revenue.

**66%**

Of a rep's week is spent  
on admin, not selling

**10+**

Hours recovered per rep  
per week with AI

**50%**

Faster ramp time  
for new hires

# Start here.

## Three things to try right now.

No software to download, no learning curve, just give it a try.

1

### Get a deal strategy in 60 seconds.

60 seconds

Open claude.ai. Type: "Here's what we sell: [paste your products/pricing]. Here's the prospect: [company, size, what they need]. Recommend the best package and give me 3 talking points for the call." Done.

2

### Build a competitive battle card.

90 seconds

Paste a competitor's website URL into Claude. Type: "Break down their positioning, pricing model, and weaknesses. Give me 5 ways to sell against them. Turn it into a one-sheet handout for my reps."

3

### Hand this prompt to your best rep.

3 minutes

Give them this: "Here's a prospect's LinkedIn and company website. Give me a 3-paragraph call brief: what they care about, likely challenges, and two personalized openers." Watch the lightbulb go on.

Now imagine this across your entire sales org.

That's where Mercantile comes in.

# A typical Monday.

## Before and after.

### BEFORE AI

#### 7:00 AM

Sales leader opens the CRM. Half the pipeline has no notes, wrong stages, or close dates from last quarter. Spends an hour on what's real.

#### 8:30 AM

Rep has 4 discovery calls. Spends 20 minutes prepping each one, digging through LinkedIn and old emails. Still walks in cold.

#### 11:00 AM

Rep finishes a strong call. Spends 15 minutes writing CRM notes and drafting a follow-up. Forgets to log a key objection.

#### 2:00 PM

Manager builds the weekly forecast in a spreadsheet. Calls three reps to ask "is this deal real?" Gets optimism, not data.

#### 4:00 PM

New hire shadows a senior rep for the third week. Still ramping. No clear picture of what "good" looks like.

#### 5:30 PM

No follow-ups went out after today's meetings. Prospects go cold overnight. Pipeline leaks quietly.

### AFTER AI

#### 7:00 AM

AI flagged stale deals overnight. Leader opens a clean dashboard with risk scores and next actions. Reviews and re-prioritizes in 10 min.

#### 8:30 AM

AI-generated call briefs with company intel, stakeholder maps, and talk tracks waiting in inbox. Prep takes 2 minutes. Rep walks in sharp.

#### 11:00 AM

Call auto-transcribed. AI extracts next steps, updates the CRM, tags the objection, drafts the follow-up. Rep sends in 90 seconds.

#### 2:00 PM

AI-generated forecast from rep activity, deal velocity, and engagement signals. Confidence scores replace gut feel.

#### 4:00 PM

New rep reviews AI-curated library of top calls, winning proposals, and objection handling. Ramping in weeks, not months.

#### 5:30 PM

Personalized follow-ups drafted from call context. Sent within an hour of each meeting. Pipeline stays warm.

# Your team loses 32+ hours a week doing work AI can do in minutes.

1

## Pipeline Management & Forecasting

AI-scored deals, automated stage updates, and forecasts built from real activity data instead of rep optimism. Your pipeline finally tells the truth.

10 hrs/wk >> 3 hrs/wk

\$28K/yr saved

2

## Call Prep & Prospect Research

Prospect briefs, stakeholder maps, and personalized talk tracks generated in seconds from CRM and web data. Reps show up prepared, not scrambling.

8 hrs/wk >> 2 hrs/wk

\$18K/yr saved

3

## CRM Hygiene & Admin

Call notes transcribed, fields updated, next steps logged, and follow-ups drafted automatically after every interaction. Reps stop being data entry clerks.

8 hrs/wk >> 2 hrs/wk

\$18K/yr saved

4

## AI Training for Your Sales Team

Most reps have never been shown how to use AI for their actual workflow. One session changes how your team operates. The ROI is immediate.

Reps close 20% faster

Pays for itself in 30 days

5

## Rep Onboarding & Coaching

AI-curated call libraries, ramp playbooks, and coaching insights that get new reps producing in weeks instead of quarters.

6 hrs/wk >> 2 hrs/wk

\$12K/yr saved

# Your AI tools.

## Built and managed for you.

Mercantile evaluates your business, recommends the right tools, and handles implementation and management. You just sell.

### **Claude AI**

The engine behind everything. Call prep, email drafts, deal analysis, objection handling, and proposal generation. Your reps use it daily. You see the results.

### **Fireflies.ai**

AI notetaker that records, transcribes, and summarizes every sales call. Your reps stay present on calls. You get searchable records of every conversation.

### **Apollo.io**

Prospecting and enrichment in one platform. Build targeted lists, enrich contacts, and trigger outreach sequences without manual research.

### **n8n**

Workflow automation connecting your CRM, email, calendar, and every tool in the stack. More powerful than Zapier.

### **Regie.ai**

AI-powered outbound sequences that write, personalize, and optimize at scale. Your reps get more at-bats. Your pipeline stays full.

# How Mercantile works.

## Sales expertise meets AI.

Mercantile is built on 10+ years of sales leadership, real teams, real quotas, and real results. Not AI advice from a consultant who's never managed a pipeline or closed a deal. Mercantile used AI to upgrade every part of a working sales operation, and now does the same for yours.

# 1

### Discovery & Strategy

Mercantile looks at how your team sells today. Where the time goes, where deals stall, what's manual that shouldn't be. You get a clear plan.

# 2

### Build & Implement

Mercantile handles setup, configuration, and rollout. Your team doesn't learn new software. They just start using it.

# 3

### Stay Current & Scale

AI moves fast. Mercantile keeps your operation on the latest tools and workflows so you're always ahead, not catching up.

MERCANTILE

# Ready to see what your team is leaving on the table?

This is a lot to take on alone. That's where Mercantile comes in.  
Book a call and I'll look at how your team actually works,  
show you where AI fits, and what it's worth to fix.

<https://workwithmerc.as.me>

tap to book your call

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