



CENTRAL BANK OF EGYPT
Egyptian Banking Institute

Markov



AI TOOLSET FOR SALES TEAMS

Using AI tools for tasks such as personalized pitch generation, lead scoring, and call summarization.



DESCRIPTION:

This course on AI for Sales accelerates every stage of the sales cycle by showing participants how to leverage AI tools like ChatGPT and Gemini for tasks such as personalized pitch generation, lead scoring, and call summarization. Attendees will discover how to cut prospecting and follow-up time from hours to minutes, boosting day-to-day productivity without any coding. The training also emphasizes selling responsibly, covering crucial topics like the Golden Rules for safe AI selling, brand-tone guardrails, and compliance keywords to ensure every AI-assisted interaction meets banking standards.

TARGETED AUDIENCE:

The training is designed for sales professionals in the banking sector.

OBJECTIVE:

- **Accelerate every stage of the sales cycle**
Participants will discover how AI tools generate personalized pitches, score leads, summarize calls, and surface competitor insights, cutting prospecting and follow-up time from hours to minutes.
- **Sell responsibly and stay compliant**
The team will internalize the Golden Rules for safe AI selling, brand-tone guardrails, human sign-off, audit logs, and keyword compliance, ensuring every AI-assisted interaction meets banking standards.
- **Master an easy, high-impact AI toolkit**
Attendees will leave knowing exactly when to tap ChatGPT or Gemini for copy, Perplexity for research, Read.ai for meeting notes, Gamma for sales decks, and Custom GPT for on-demand coaching, boosting day-to-day productivity without any coding.

COURSE CONTENT

AI-Enhanced Selling: Accelerating Performance in Banking

- **The Strategic Shift to AI-Assisted Selling**
Why AI is now essential for banking sales teams: driving personalization, boosting response speed, and staying compliant in Egypt's competitive market.
- **AI Fundamentals for Banking Sales Professionals**
Core applications in plain language: predictive lead scoring, generative pitch writing, and voice/text sentiment analysis—illustrated with real Egyptian banking examples.



- **AI Explained Through Local Banking Stories**

Machine Learning, NLP, and Generative AI—made clear through relatable use cases from retail and corporate banking in Egypt.

- **Effective Prompt Engineering for Sales Teams**

Five principles for generating on-brand, compliant, and high-conversion AI outputs—plus privacy-safe phrasing and data-handling guidance.

- **Deep Research for Competitive Intelligence G CRO**

Use AI to uncover competitor offers, customer pain points, and conversion-rate optimization opportunities—fast and fact-based.

- **Personal Productivity Tools for Sales Leaders**

- Read.ai for instant meeting insights and action tracking
- Gamma for creating compelling, on-brand sales presentations in minutes

- **Instant Pitch Generation – Tailored to Your Customer**

- Paste a product brief > GPT drafts three audience-specific email pitches (youth, SME, HNWI)
- Trainer breaks down the reusable prompt structure—attendees observe and capture best practices.

- **Smart Lead Scoring Without Complexity**

Upload a 30-row lead list > GPT classifies leads as “hot / warm / cold” with a brief, explainable rationale—no models, no setup.

Responsible AI for Ethical and Compliant Selling

- **Golden Rules for AI in Banking Sales**

- Consent-first data use
- Strict brand-tone guardrails
- Mandatory human approval
- Full audit logging
- Automatic screening for compliance-sensitive language

- **From Call Transcript to CRM Update in 60 Seconds**

Drop a raw sales call transcript > GPT generates a clean, structured CRM note with action tags (e.g., “follow-up,” “product interest”).



- **Secure Preparation of Sales Data**

Quick demo: use AI to remove PII (IDs, phone numbers), retain segment tags (e.g., "SME," "salaried"), and save files in approved formats.

- **Quick AI Wins for Daily Sales Execution**

- Personalized pitch writer
- Lead-score enhancer
- Call-note summarizer
- Objection-response coach
- Daily market-news digest (localized for Egypt)

- **Compliant Objection-Handling Guide**

Enter a common customer concern > GPT returns a benefit-focused, regulator-ready response aligned with bank messaging.

- **Ask-Me-Anything Lab: Real Sales Challenges, Solved Live**

Participants submit actual front-line scenarios; trainer demonstrates practical, no-code GPT prompts that deliver immediate, compliant solutions.

TOOLS:

- Julius AI
- ChatGPT
- Gemini
- Perplexity
- Deep research (Gemini, ChatGPT, Perplexity)
- Read.ai (AI-powered meeting insights)

