

What's possible with AI in sales

Evidence current to mid-2026.

A clear breakdown of where AI does and does not fit across the core tasks of a sales team. A practical starting point, not the last word.

Where AI is mature: strong fit today

Proven and available today. AI does the bulk of the work and the rep reviews it.

Function	The job today	With AI
Call and meeting notes and summaries	Take notes during the call, write them up, capture actions and next steps	AI records with consent and drafts the summary and actions; the rep checks attribution and owns what goes in the CRM
CRM updates and activity logging	Log calls, emails and meetings, keep contacts and stages current	AI captures activity from email and calendar and drafts the updates; the rep owns stage changes and keeps the data clean
Outreach and follow-up drafting	Write the first email, the follow-up and the recap, tailored to each person	AI drafts from a short brief and your notes; the rep edits for truth and tone and owns the send
Sales content and collateral	Write battlecards, one-pagers, email templates, call scripts and case-study drafts	AI drafts from a brief and your material; the rep checks the facts, the competitive claims and the brand voice
Account research and meeting-prep briefs	Dig through the website, news, LinkedIn and filings before a meeting	AI pulls the public information into a first-draft brief; the rep verifies the names and facts before the meeting

Where AI is emerging: consider piloting with a human gate

Promising but not yet proven at this scale. AI assists and the rep stays in the loop, so trial it on a contained scope first.

Function	The job today	With AI
Prospecting and lead-list building	Research accounts and contacts, spot trigger events, build and enrich the list	AI researches and enriches at speed; the rep verifies the contact data and consent before anyone is approached
Inbound lead qualification and routing	Answer the enquiry, qualify against the ideal customer profile (ICP), route to the right rep, follow up fast	AI replies instantly, handles the logistics and routes; the rep takes the real qualifying conversation
Proposals, quotes and statements of work (SOWs)	Pull the requirements, assemble the proposal, set price and scope, route for sign-off	AI assembles the draft from your template and CRM; the rep owns the price, the scope and the commitments
Request-for-proposal (RFP) and security-questionnaire responses	Read each question, find past answers and evidence, draft, route to the expert	AI drafts from your approved library; an expert verifies every claim about capability, security and compliance
Pipeline inspection and deal-risk flagging	Review the pipeline deal by deal, spot what is stalling, decide what to chase	AI surfaces stalled deals and engagement signals; the sales manager judges the deal and owns the call
Conversation intelligence and coaching	Listen back to calls, score them, coach the rep	AI transcribes and flags talk-time and structure and points to the calls worth reviewing; the sales manager owns the coaching

Function	The job today	With AI
Forecast roll-up and deal scoring	Roll up the reps' commit calls, weigh the pipeline, build the forecast view	AI assembles the roll-up and flags risk in the numbers; the sales manager owns the committed forecast

Where AI is not ready or suitable today: keep with people

These stay with people, either because the tooling is not reliable enough or because controls and compliance rule it out.

- **Final pricing and discount authority.** Setting the price and approving the discount is a commercial commitment. AI assembles the quote; the sales manager or owner sets and approves the number.
- **Negotiation and the closing relationship.** The trust that closes a deal is human, buyers still turn to a sales rep to validate what they have read, and selling people know is automated erodes trust. AI prepares; the rep closes.
- **The committed forecast.** The number you stake your credibility on to the board. AI can draft the roll-up, but predictive accuracy collapses on small or messy pipelines, so the commitment stays with the sales manager.
- **Claims and commitments to customers.** What you promise on price, capability, delivery or compliance is binding, and the business is liable for what its AI says (the Australian Consumer Law and the chatbot-liability cases are clear). The rep owns every claim.
- **Mass autonomous outreach.** Letting AI source, write and send cold outreach at scale, unreviewed, is where the "AI sales rep" promise broke in 2025: poor results, deliverability damage, and Spam Act and Do Not Call exposure. The rep owns who is contacted and what is sent.

Worth weighing: for any of these, the upfront setup (loading your templates, ICP, product and pricing rules, and agreeing the review steps) is a one-off, separate from the ongoing effort, which on the strong-fit items is mostly review. The time that comes back goes to the selling: the conversations that build trust, the research that sharpens the pitch, and the deals that need a real read of the room. AI takes the notes and the drafts; the rep stays where they move the deal.