SALES AI USE CASE | PLAYBOOK

The Stakeholder Intelligence Playbook

How a fast-growing B2B technology company uses AI in Salesforce to classify contact roles from real email conversations, automatically.

Sales | B2B Technology | LLM Classification

TECHNOLOGY STACK

Salesforce Sales Cloud · Email Logging · AI-Powered Prompt (LLM Classification) · Salesforce Automation

EXECUTIVE SUMMARY

Know who you're talking to in every account

B2B deals are won by engaging the right people, but knowing who is who inside an account depended on reps updating CRM data by hand. Working with ABSYZ, a fast-growing B2B technology company built an AI-powered solution in Salesforce that reads every logged email, classifies the sender's role from the conversation itself, and updates the Contact record automatically. Sales teams now have accurate stakeholder insights with no manual data entry.

For sales reps
Accurate contact roles without typing them in

For sales leaders
A clear view of which stakeholders are engaged

For CRM data
Contact records that stay current as emails arrive

THE CHALLENGE

Contact roles that were missing or out of date

The data problem

- **Missing or outdated roles**
  Many Contact records had no role or an old one, leaving reps unsure who they were dealing with.
- **Titles rarely tell the full story**
  Senders often skip their title, and titles alone don't show who decides, evaluates or approves.

The sales problem

- **Manual data entry**
  Reps read emails, judged each sender's role and updated records by hand, time taken from selling.
- **Stakeholder blind spots**
  Without accurate roles, teams couldn't see which leadership, technical or finance contacts were engaged.

INSIDE THE SOLUTION

From email to updated contact, automatically

1

Email logged

An email is received and logged in Salesforce, triggering the automation.

2

AI reads it

An AI-powered prompt analyzes the email body for intent and context.

3

Role classified

The LLM classifies the sender from language patterns, even with no job title.

4

Contact updated

The role is written to the Contact record on the related Account.

The five stakeholder roles

Example signals are illustrative

LEADERSHIP TEAM

Talks strategy, priorities, partnerships and final sign-off.

TECHNICAL TEAM

Asks about architecture, integrations, APIs and security.

PRODUCT ENGINEERING TEAM

Discusses roadmaps, features, accuracy and product fit.

OPERATIONS

Focuses on rollout, processes, timelines and day-to-day usage.

FINANCE TEAM

Raises budgets, pricing, invoices and contract terms.

NO JOB TITLE NEEDED

The AI reads how people write, not just what their signature says.

THE RESULTS

Accurate stakeholder data, zero data entry

Zero

manual data entry

for contact role updates

Every

logged email analyzed

automatically for stakeholder role signals

Up to 70%

less time on role updates

spent by reps researching and updating contact roles

5

stakeholder roles

classified consistently across every account

Figures are indicative ranges for this type of solution. Actual results vary by business, data quality and adoption.

SELF-ASSESSMENT

Is your CRM ready for AI role classification?

Tick every statement that is true for your business today. Your answers can be saved with this PDF.

- [ ] Many of our Contact records have no role, or an outdated one.
- [ ] Reps update contact roles by hand, when they remember to.
- [ ] We often don't know whether a contact is a decision-maker, evaluator or approver.
- [ ] Emails are logged in Salesforce, but nobody mines them for insight.
- [ ] We struggle to see which finance or leadership contacts are engaged in a deal.

Ticked two or more?

AI role classification can likely turn the emails you already log into accurate stakeholder data.

Roles that matter most in your deals (optional)

LESSONS FOR SALES AND REVOPS LEADERS

Four things to get right

01 **Define roles that match your deals**
Keep categories few, clear and tied to how you sell.

02 **Log emails consistently**
The AI can only classify what reaches Salesforce.

03 **Review early results**
Spot-check classifications at first and refine the prompt.

04 **Act on the insight**
Use roles in account plans, outreach and deal reviews.

Ready to turn emails into stakeholder insight?

Talk to an ABSYZ expert about using AI in Salesforce to keep contact roles accurate across every account, automatically.

Book a consultation

www.absyz.com

About ABSYZ: a Salesforce consulting partner helping businesses design, build and scale customer experiences across Sales, Service and AI.