

[Steve]

[instrumental music]

[Steve]

Welcome to CRM Talk, the show that brings you the latest in CRM and CRM-related news and information. This is Steve Chipman, along with my co-host, Sam Biardo. And today we're gonna talk a little bit about a topic you may not have heard about- much about recently, AI, and how it pertains to CRM, marketing and sales. How are you doing, Sam?

[Sam]

Doing well, Steve. And you were telling me just before the show about how, uh, you're using AI to do account-based marketing.

[Steve]

I guess that's what it is. So, it started with you saying that you're using Gemini through search and trying to make sure that your Starfish product appears in Gemini search results. And I haven't actually used Gemini just for straight search. I tend to use regular Google AI overviews and all the other stuff on the screen, and then now, um, AI mode. But what I've been using Gemini for is doing account research for salespeople, sales teams. And I've got this fairly elaborate prompt, and I used Deep Research. So for those of you who are on Google Workspace, if you're on Google Business or higher, this doesn't work with- with Google Workspace Starter, but with Business and higher, you have this mode in Gemini called Deep Research. This is in Gemini 2.5 Pro. And what you can do is feed it a prompt, telling it who- what your company is, what you do, and then asking to research a specific company and feeding it parameters, such as I wanna learn about executive management, financial information, go-to-market strategy, technology stack, if you're in the CRM business like we are. And it comes back with a very elaborate report. Now, what I do for Salesforce users is I'll put that into the account object. You- if you have Salesforce connected to your Google Drive, then it's pretty easy to create a custom object that lets you take this Gemini output, save it as a Google Doc, and then make it appear in the account record in Salesforce. But Gemini Pro doesn't stop there. What it also gives you is this canvas mode, and canvas is effectively just HTML output, and it's a condensed version of this very long report. So, as you know, Sam, not all salespeople are gonna read a 5,000-word report about their company, even if they were gonna make a lot of money by selling into it. So, with this canvas version, you can ask it for an infographic or a condensed version of this long text document that's nicely formatted. Now, it's in HTML, and there are techniques for getting it into Salesforce so it also is embedded in the account object, th- that's probably the case with other CRMs. And then the third thing I wanted to mention is Google developed, under its NotebookLM group, this concept of an audio overview, which you may have heard. We actually used it to wrap up a podcast a few episodes ago. And that- what that does is it takes some content you feed it, and it transforms it into a conversational podcast between a man and a woman. It's a little bit hokey. But what I found with this, very interestingly, is that I was using this-

[Steve]

this method to research a lead we got, and it gave me the long document. I read it. My eyes were glazing over halfway through. I later listened to the- to the hokey podcast rendition of the document, and I picked up on a key piece of information auditorily that I would not- that I did not visually see. So, uh, two things, two- two reasons to use the audio version. One is some people are just naturally audio learners, so it's better for them to learn that way. And two, even if you're of the type that might read 5,000 words, you're probably gonna miss something reading that much information, and the audio version co- could give you a key detail that you might use in your approach to that client when you're selling. So, those are just a couple of the ways that I'm- I'm using Gemini. And Sam, I'll let you talk a little bit more about-

[Sam]

Well, I- I was just wondering if you could take the canvas document and send it to an AI, and say, "Create us- uh, an action list of items I need to do to be able to sell into this account."

[Steve]

Y- well, you could do that as a follow-on prompt to the main document or- or, yeah, or- or off the canvas document. But you- you probably wanna do it in the same- in the same chat.

[Sam]

Yeah. See, we're- we're- we're right now, uh, doing our account-based marketing through I- LinkedIn.

[Steve]

Mm-hmm.

[Sam]

And so the way we're using, uh, LinkedIn is we're, uh, doing the research about a company and all their executives, and then we're actually asking it to give us, uh, a 200 character or less, 'cause that's what LinkedIn requires, uh, introduction to this, uh, contact. And so I- so then I can connect to them.

[Sam]

And I'm using that to connect to people I really don't know, but it really sounds personal because it's pulling in data about the company and what this person's role is and what their role is with the particular potential internal projects. And I- you know, you know, and- and it's b- a little bit more of a personal, uh, uh, connection. So, we're, you know, w- it's not al- it's not always perfect. M- not everyone connects to you, 'cause connections are crazy right now. Everyone's connecting to everybody in LinkedIn.

[Steve]

Right.

[Sam]

But, uh, the reality is is that, uh, that's step one. And then what we do is we, uh, produce

[Sam]

videos and, uh, podcasts. And what we actually have done is fed those into our- an AI ch- uh, and-... then take the podcast and say, "Given this podcast, write a LinkedIn introduction," and then I'll post the podcast, uh, out like we do CRM Talk. But then I'll have a LinkedIn post that links to that podcast that's actually all been AI generated, and it gives a nice little quick summary of the podcast, uh, and I don't have to do that anymore.

[Steve]

And wait, and who are you- who are you- who are you sending that summary to?

[Sam]

I'm just posting on LinkedIn. So-

[Steve]

Oh, okay

[Sam]

... yeah. So we've got the CRM Talk and once we- once we post this, you'll see if you lo- go look

on my, uh, uh, LinkedIn page, you'll see a message saying, uh, "Go listen to our podcast. Here's what we talked about." But that's not generated by me. That was generated by the AI listening to the podcast.

[Steve]

Got it. Okay.

[Sam]

[laughs]

[Steve]

Um, yeah, and then, um-

[Sam]

It's- it's great. I can't tell you how many hours a day I feel like I'm saving by having the- what I would call the unimportant emails that you have to write being written by AI. [laughs]

[Steve]

Absolutely. And- and I- I said recently, I- I recently posted on X, y- you know, as everyone's moaning about the, uh, decrease in clicks because when people get their answers through AI overviews or AI mode or ChatGPT, they're... Fewer people are clicking through the websites because, of course, all that information has- has been consumed by the AIs and is... And the answers are being provided in- in many cases. Um-

[Sam]

Right. But that's why you have to train the AI. So i- if you understand that the AI- AI is really reading what content there is on the web, you can f- you can force the AI under certain search, uh, criteria, such as what is the best way to integrate, uh, uh... One- the one we were doing for StarFish was what's the best way to integrate, uh, Infor CSI with, uh, Salesforce? And it would come up for a while there and say StarFish, our StarFish product, u- until it didn't one day. I would check it, like, every couple days. And then it came up with Zapier. And then what we did is we wrote a bunch of articles and LinkedIn posts that amplified that. And then the next day, it said, "Products like StarFish and Zapier." [laughs] So- so you can trick them, but you've gotta be very specific and you need a very specific, say, blog article and a bunch of them t- that Google will then index and put in their summary. So the trick is, uh, generally is to if you have a very specific question that people are Googling and you want that to come up in the AI, you need to have a- a series of supporting materials that are posted in different sources, such as, uh, LinkedIn, uh-

[Steve]

Right

[Sam]

... and- and X and other... Uh, Facebook potentially, and other places that talk about this, and blogs on your website, and blogs that other people post and amplify. Do that, and you'll get- and you'll get into that search engine.

[Steve]

But- but what you- you just said is more about getting your brand to appear. So- so what I'm hearing is the- the clicks are down no matter what you do, but the key is to have your brand being mentioned. So you just... In your case, it was really a brand mention of StarFish. People aren't necessarily immediately gonna go to a specific article, like in the ten blue links days and find out more. But now they've learned about StarFish, and they might go to starfish.com an

hour later the next day. So- so the- the key that I've been hearing about AI overviews and ChatGPT and AI mode is y- it's- it's- it's really a brand-first SEO strategy or GO strategy.

[Sam]

Yeah. And- and- and it's- it's- it's sort of like SEO was, right? We'd- we'd write all this SEO so that we'd be on that first page, right? And then- and then now Google's effectively replaced that, right? So when I do a search, you know, first the AI come... Fir- well, first the sponsored comes up, then the AI comes up, then that magic Google box comes up if it, y- you know, where if you're... If it thinks you're gonna buy something, and that's all being managed by Google, right? And- and then the re- standard SEO comes up somewhere on page two. And who goes to page two? So the- the challenge is, how do you get yourself into the AI answer?

[Steve]

Yes. Right.

[Sam]

And that- and that's essentially the same problem we've had before. It's just a lot of SEO. But now it's, uh, digestible SEO that the AI has to digest and put yourself into that, uh, uh, answer set that's being generated by the AI.

[Steve]

But if you don't have a strong brand, if you're- if you're a startup and... Or if you're a more established company without a unique name, you're at a disadvantage in this- in this new world, in terms of being... Come- coming up in s- in t- search results, AI search results.

[Sam]

Absolutely. Yeah, I totally agree. Yeah. [laughs]

[Steve]

So- so the other thing I was... What I was gonna say earlier on- on X is that the post I said was that the- the Google giveth and the Google taketh away. And so Google has been taking away clicks, but what they've been giving us are these incredible time-saving tools, and they've also been giving us these... I- I almost look at some of... Gemini as a- as a content redistribution tool, because if you have a- a blog post that you wanna turn into a video, you can do that with a NotebookLM video overview. You could do it... If you have some production time, you could do it with a- a string of veo3 clips. So you can... So now Google's giving you these tools to take all that content that you've developed over the years that fewer people are gonna go to, and now you can- you can repurpose it in slide decks, audio, video, you name it. And the distribution..... game is at least as important as it was before all of these, these clicks were taken away, so that's really important to keep in mind when you're marketing your business.

[Sam]

Yeah. The other thing you can do, um, is if you w- want... So, I- I always look at... I always think in PowerPoint, so unfortunately, I'll, I'll... Before I do anything, I'll create a, a bunch of PowerPoint slides and then, uh, multiple versions, refinements. I have a nice little deck, but you can take that deck once you feel you've got it in the right place, and you can send it to, like, ChatGPT and say, "Given this PowerPoint deck, write a, uh, document... Create a document that describes what's inside the deck." And it will, it will create a pretty accurate document [laughs] of what you put in your, in your sales deck. Um, and so at th- that point, obviously, you still have to read it and edit it, but once you've done that, uh, you can then post that up as an article on your website. And then, of course, that article gets indexed and it reinforces the, uh, AIs that are producing those answers.

[Steve]

You can almost look at AI now as an anything to anything translation tool when it comes to content.

[Sam]

Yeah.

[Steve]

Any, any format to any format translation tool.

[Sam]

Yeah. I- I have, um... I've got a, a, a step-by-step guide, and I literally, uh, uh, for implementing marketing that we put together for a very specific product called Creatio. And, um,

[Sam]

I've sent that off to ChatGPT and said, "Uh, create a PowerPoint presentation." [laughs] And it, it, it wasn't great, but it wasn't bad either. And so those are the types of things, uh, uh,

[Sam]

that I think

[Sam]

Als are gonna excel at, right? So w- we, we create some initial content, and then we have it transform it into multiple formats. It's still not really good at... I mean, it's good, but it's not really good at saying, "Create original content." It's gonna give you something that someone else did, and nothing's gonna be original in it. But if you have some original ideas and you can put that in one format, you can easily transform it, like you said, to a podcast. You can transform that to, uh, a PowerPoint or a Word document or a blog article or a summary on LinkedIn.

[Steve]

Yeah. And- and now y- y-... So if you're a... Whether you're a B2B or a B2C business, it used to be... For, for smaller companies, it was absolutely out of the question to have a 45-second or one-minute promo or commercial filmed and produced. Well, now, you can do that with these video tools. I happen to think that, that, uh, VEVO3, Google's VEVO3 is the best. And what, what it's limited to now are eight-second clips, but you can get really creative within that eight-second constraint, and you can put together clips that are different scenes. You can also create character and scene continuity by grabbing the last frame of an eight-second clip and uploading that as a photo as part of your prompt when you give the prompt for the next scene. And I've, I've done that to create character continuity in kind of a spoof I did on a, a Got Milk ad. I call it Got- Got CRM, and I wanted to have the same c- character appear in clip two, six, and seven. So all I had to do was take the still of the character from an earlier clip and, and VEVO reproduced it perfectly. Now, the, the one thing about VEVO3 is that, uh, I know on Google Workspace Business, which we're on, you're limited to three clips per day, [laughs] which is pretty limiting 'cause you have to do retakes. It's like live video. And if you wanna have unlimited or virtually unlimited clips per day, then you have to pay the big bucks for the full Google Studio. But if you're on Google Workspace Business or higher, I encourage you to check out, uh, VEVO3 Videos. And a little bit of a workaround, I happen to have access to three different Google accounts. I got my own, I've got one for marketing, and one for admin. So I can actually do nine per day, [laughs] but still not enough.

[Steve]

But if you're of the mind and you wanna promote your product or service and you've... and you

don't mind spreading out the effort over several days, you can do it. The key is to build out your scenes first. Build out a script, build out your scenes, and you can just start with a simple eight-to-10-scene promo,

[Steve]

create the prompts for it, uh, have a tool where you, where you can grab the still of, of one of the frames in the video. I use... happen to use Camtasia. And then with a little bit of, uh, elbow grease, you can pretty easily put together a 40-second or longer promo for your product or service that looks like something you would have paid \$100,000 for 10- y- um, five years ago.

[Sam]

Yeah. We're experimenting right now with, uh, just using an iPhone. So I've got an iPhone on a tripod, and, um, I, uh, come up with a... We have come up with a question. In fact, someone in marketing, uh, came up with a question and some bullet points that they want me to mention, and I do, like, a minute-and-a-half discussion on that one question, and I'm done, and we've been posting those. And I think those are becoming real popular now because it's less than a minute, and I'm-

[Steve]

Yeah

[Sam]

... I've, I've created a, a list of about 40 topics, uh, that I'm gonna try to do all under 60 seconds, um, where I can... It's, you know, like, uh, "What's the relationship between risk and length of project time?" Things like that. And, and hopeful... And the reason why I'm... they're so micro is because, again, if someone's searching in, um, uh... If someone is searching e- or asking that to an AI, the question is gonna be, "Well, what... You know, what's the relationship between X and Y?" And y- if you have that specific topic in a video, it's gonna be, um..... but it's gonna be the one that they're gonna, uh, find first, and it's gonna also influence the AI. So again, that's why I'm doing all these little mini topics because if someone asks that question like, um, you know, h- what's, they're not broad questions, right? Like, they're not like, "What's the best way to do user adoption?" Right?

[Steve]

Mm-hmm.

[Sam]

It, it's like, how important is management in, in user adoption? Right? It's gotta be a very narrow band question, but those are the ones that you're, people are asking the AIs. So if you have the answer to that, you're gonna, you're gonna be digested and come up as part of that answer.

[Steve]

Well, someone pointed out, pointed out on X the other day that there are more YouTube videos in, in AI. It was either AI mode or AI overviews, maybe both, than ever before. So that type of information probably should be on YouTube in addition to social.

[Sam]

Right. And, um, so I, I just think this is like a great tool for creating your bra- your personal brand, your company brand, and conveying s- very specific type of information about your products, uh. And then as we talked about for account-based marketing, it's a great way of, of, of finding your customers and going after them and connecting to them and providing content on LinkedIn and other sources that once you're connected with them, they're gonna start

getting impressions. And so that just, again, proves that you're an expert in their industry.

[Steve]

Right. And then beyond that, when you start the sales conversations, if you've got that, that AI based deep research, you've got some insider baseball. So you, you, you don't ask as many questions that are, have obvious answers 'cause you know already, and you've got some insights into their organization. Let's say you're selling technology.

[Steve]

Um, let's say you're selling CRM like we are.

[Sam]

Mm-hmm.

[Steve]

Well, I found this deep research, if you specifically ask about their tech stack and you, you enumerate, um, categories like ERP, it'll actually come back and tell you what the ERP they have is. So a lot of times that's a mystery, but they'll... And they'll find that inf- information through job postings, for example. So think, think about how long it would take you to figure out what ERP system a company had by telling a person to go through all the job postings for the last five months and see if there's anything that, that's relates to hiring a finance person, for example. Now you get it right away.

[Sam]

Yeah. It, it, it's interesting 'cause, um,

[Sam]

maybe even as

[Sam]

f- five years ago, as of maybe five years ago, I had this massive set of questions and I mean like massive, I mean like 20 pages of questions that would cover discovery, you know, and it would be like, uh, do you... You know, it would be 15 questions on knowledge base, you know, and 10 questions on quoting and tons of questions on different types of integrations that they would wanna do. You know, integrations with ERPs, integrations with, and, and marketing automation, integrations with, uh, e-commerce and so on.

[Sam]

And I've abandoned that. Uh, the questions, I still need to know those things, you know, and I was, I was using it as a template for years when I was talking to a client to say, "Okay, they answered this one, they answered this one." But I can literally give the question to an AI and a name of a company and get 90% of that back now.

[Steve]

So AI has replaced most of discovery?

[Sam]

Correct. Well, well, it, it, it, it augments dis- it changes discovery from, "What tech stack do you use?" To, "Hey, w- we think this is your tech stack. Is that correct?" [laughs]

[Steve]

Yes, exac- it's just confirmation now as opposed to-

[Sam]

Yeah. Right

[Steve]

... starting from scratch.

[Steve]

So the other thing in terms of ABMI- I tried out recently, again through Google, uh, uh, Gemini 2.5 Pro Deep Research was I said, "Um, investigate the management hierarchy of this account and return the results to me in this format." And I uploaded a CSV, a, a model CSV, which happens to be the format that Lucidchart uses for importing. So and it worked really well. I, I, I, like anything else, just like you have to rewrite some of the text that comes out, you can import this exported CSV into Lucidchart, builds out the hierarchy for you, and if something's not right, you can drag stuff around. Or as you say, the confirmation when you're on the call, first call with the person that says, you can say, "Well, it looks like your, your, um, CMO is this person and these two people work for that. Is that correct?" And they'll either say yes or they'll correct you, but you've got this great starting point of a hierarchy. And even if you're not a Lucidchart user, Lucidchart just happens to be a good tool, you can create a version of that in that, in the Canvas tool I mentioned earlier. So you can get the HTML output of the, of the org chart. It's a little funky. You have to give it some extra prompting to say, you know, it's okay to go wide, but don't cut. [laughs] If you don't tell it to put in scroll bars, it'll, it'll cut it off at the side. So you sort of, you learn as you go in terms of some of the, uh, vagaries of how these things output graphic, but you can get a pretty good rendition of an org chart.

[Sam]

That's really cool stuff. You know, I have a pet peeve though. I have a pet peeve when, when people don't modify their AI generated stuff and you can recognize it immediately.

[Steve]

Oh, for sure.

[Sam]

So if someone sends me an email that says, first sentence is, "I hope this finds you well," which is what, uh, Copilot says, um, I just don't even read it. It just go, I just like, "Oh, delete." [laughs]

[Steve]

[laughs]

[Sam]

So my, my advice is if it's a really important message, don't make it obvious that an AI read it because most people are, uh, most people are getting wise to the opening sentences from ChatGPT and Copilot and some of the others.

[Steve]

Well, you can do a lot of n- negative prompting in your prompts and say, "Don't open with things like this, this, and this."

[Sam]

Right. Yeah.

[Steve]

And I see that more and more.... where... And, and you, and you tell it more and more to no fluff, sound like a human. It, it actually listens to you to some extent if you give it those, those

prompts.

[Sam]

I wish it would stay there, though, because what ends up happening is you give it to those prompts and it solves it for that, but I want that for all prompts, you know, going forward.

[Steve]

Well, that's, that's the next phase in these, in these... Uh, they're not even calling them chatbots anymore, they're calling them AI assistants.

[Sam]

Right.

[Steve]

So when we say AI assistants, it's the continuity session to session where it remembers the things you ask for in earlier sessions. I think ChatGPT is supposed to be doing that to some degree.

[Sam]

No, they are. They are doing that right now.

[Steve]

Yeah.

[Sam]

Um, the... Uh, I will say that, yeah, we've been playing with our StarFish company, uh, with, uh, interactive chat, um, uh, chatbots, and it's, it's quite interesting what you can do, how quickly you can build out an integration if you just say, "Build an integration between this table and this table," and then come back and say, "Oh, no, and change this to do this, and change that to do that." Uh, you can knock out like a... A thing that used to take us a day, you know, could be under two hours now.

[Steve]

Right. Yeah.

[Sam]

You know? And it's like, it's gonna... It's just gonna get faster.

[Steve]

Yep. And it all comes back to spending the time... As humans, the best thing we can do is to become better prompters and to catalog all of our prompts. I don't know about you, but I've got a cou- I have three different Google docs, each of them has about 30 tabs of prompts. And I used to just, you know, prompt, prompt an AI assistant, and then that would go in the ether, I'd forget about it. Now I make sure to document everything so I can always go back to it. And that's

[Sam]

Actually, I'm gonna steal that idea, 'cause I don't do that at all. I'm, I'm... [laughs] Everyone's a bespoke prompt.

[Steve]

[laughs] Yes.

[Sam]

So I'm gonna have to, uh, figure out, uh, how I wanna manage that, but that's a really great idea, Steve.

[Steve]

Yeah. I, I even thought there, th- that there might be a database app for that, but that's going a little too far. You can just, you can just do it for now. But over time, I think a lot of us are gonna end up with hundreds or thousands of different prompt variants for different things.

[Sam]

[laughs] I'm just, I'm just thinking about it. Yeah, no, it's... I could see, uh, I'll need a bot to manage my bots. [laughs]

[Steve]

Exactly. That's... [laughs] I'm sure someone's gonna come out with a prompt management system.

[Sam]

Yeah. [laughs]

[Steve]

Maybe I'll ask. There's this new app called, uh, Mocha, this app builder, which is very good, and it's got built-in database. And I'm, uh, I'm putting together... Well, I had been putting together a pretty elaborate prompt to have it build out a CRM system, but then I realized, well, I'm just using the traditional CRM motif of accounts, contacts, leads, opportunities, tasks. And I realized that if anyone who's building a new CRM system today, they're making it native AI, and it's not gonna look anything like the old forms and lists that came out with... When all these products came out a few years ago. So

[Steve]

gotta, gotta think AI when you're building... You, you have to th- Anytime you're building an app, you almost have to make it an AI first app, app. And that, that has-

[Sam]

Right

[Steve]

... its own set of complications, such as, "Okay, what... Are you gonna... What are you gonna connect to and what's it gonna cost?" So...

[Sam]

Yeah.

[Steve]

All right. Well, um, with that, Sam, I think we can w- wrap up this episode, unless you have any other parting thoughts?

[Sam]

Um, I'm good, Steve. Uh, nice talking to you. We haven't, we haven't talked in about a month. You had a wonderful vacation, I heard, and, um, it looked-

[Steve]

You're good?

[Sam]

Yep. And...

[Steve]

And good talking to you too, Sam.

[Sam]

Yes.

[Steve]

And to our audience who, who are, who are still hanging in there, thanks for listening. I know we've, there's been a little bit of a, a little bit of a gap since the last one, but

[Steve]

you know, we're-

[Sam]

Conflicted schedules is what I would call it. [laughs]

[Steve]

That's a good way to put it, I think, yeah. All right.

[Sam]

Take care, Steve.

[Steve]

Take care.