

AI SALESMAN – LEAD GENERATION & RE-ENGAGEMENT WORKFLOW

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Purpose:

Acquire **new B2B medical clients (decision makers in KSA)** for **Event Troop services** (VR/AI medical events, medical workshops, booth design, event production, training platforms) — **not ticket sales**.

1. CORE PROBLEM THIS SOLVES

Current blockers:

- Client data scattered across sheets
- Partial / missing segmentation
- No scalable follow-up
- No intelligence in responses
- Sales team overloaded with cold outreach
- No structured handover between automation and sales

This workflow creates a **controlled AI-assisted sales engine**, not an uncontrolled chatbot.

2. SYSTEM COMPONENTS (WHAT IS NEEDED)

A. Central Client Database (CDP)

Single source of truth for all prospects and clients.

Stores:

- Company name
- Contact person (name, role, email, WhatsApp)
- Medical field / specialty
- Segment (decision maker type)
- Source (sheet, referral, past client, etc.)
- Engagement score
- Communication status
- Last AI / human action

Requirement:

PostgreSQL database (scalable, API-driven) or any suitable database that can be expanded for any future integration with this database.

B. AI Sales Agent (LLM-Based or any other RACK model)

Role:

Acts as **pre-sales assistant**, not a closer.

Trained on:

- Event Troop services (VR, AI, events, booth design, training)
- Company history & portfolio
- Past proposals & success cases
- Medical industry language (KSA-focused)
- Sales tone & rules (what it can / cannot say)

Important control rule:

AI never finalises deals — **only qualifies and hands over**.

C. Automation Engine (n8n or any suitable platform)

Responsible for:

- Moving data between systems
- Triggering AI actions
- Logging everything
- Enforcing business rules

D. Communication Channels

- **Email (Primary):**

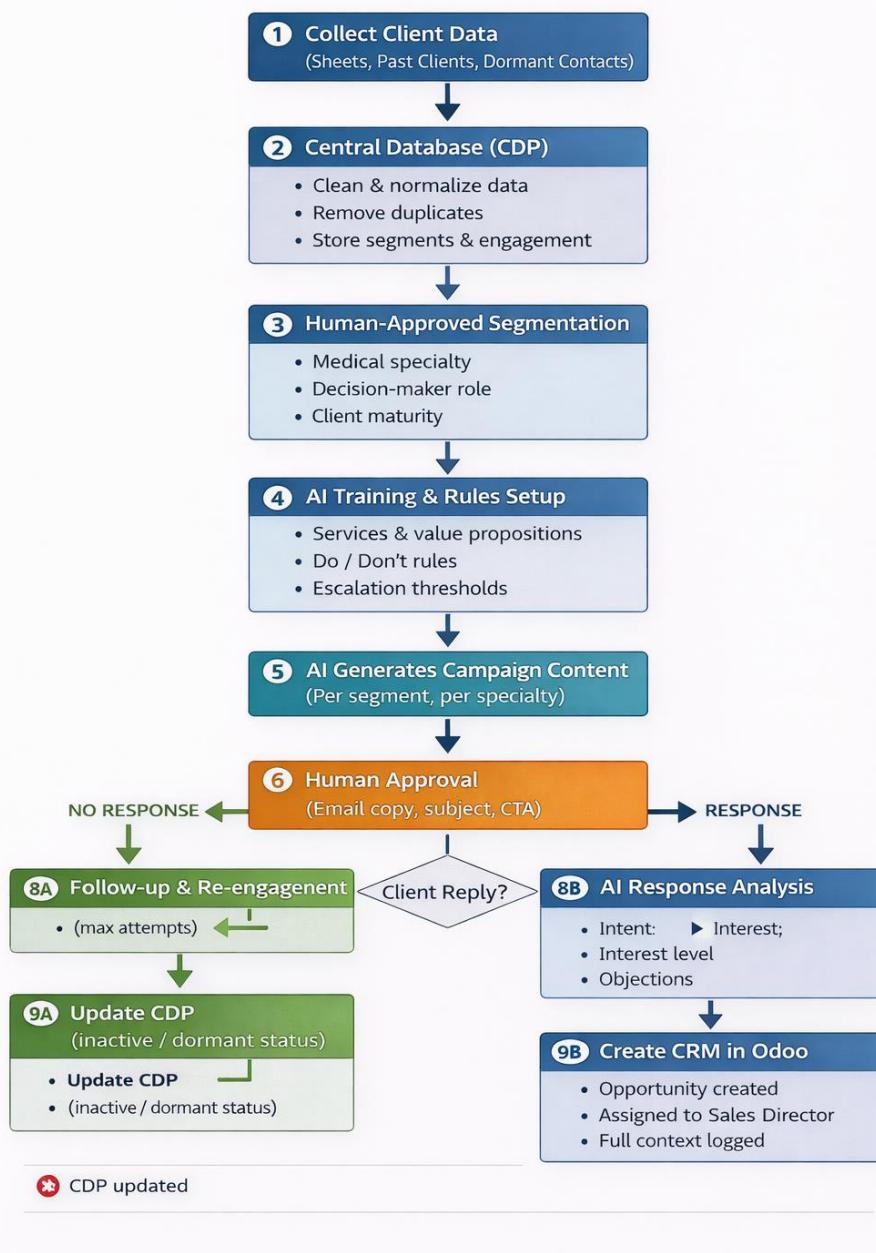
- Mailchimp for bulk segmented outreach
- Google Workspace for 1-to-1 replies
- **WhatsApp (Phase 2):**
- Only after interest is confirmed and/or in parallel with the bulk send

E. Odoo CRM (Sales Control Layer)

- All qualified leads live here
- AI agent has its own Odoo user
- Sales director owns final decisions

3. END-TO-END WORKFLOW (STEP BY STEP)

AI SALES AUTOMATION – MAIN WORKFLOW



PHASE 1 — DATA CONSOLIDATION & PREPARATION

Step 1: Collect & Centralise Client Data

Inputs:

- Existing segmented sheets (medical fields)
- Unsegmented sheets
- Past clients
- Dormant contacts

Actions:

- Import all data into CDP
- Normalize emails, company names, roles
- Remove duplicates
- Tag confidence level (High / Medium / Unknown)

Output:

Clean, scalable client database

Step 2: Initial Segmentation (Human-Approved)

Segments created manually first:

- Specialty (cardiology, neurology, oncology, etc.)
- Decision maker type (medical director, marketing, procurement)
- Client maturity (new / warm / dormant)

AI **does not decide this initially** — it learns from it.

PHASE 2 — AI TRAINING & CONTROL SETUP

Step 3: Train AI Sales Agent

Provide AI with:

- Structured service catalog
- Approved value propositions per medical field
- Do's and Don'ts
- Response escalation rules
- Sample good & bad replies

AI is instructed to:

- Ask qualifying questions
- Detect intent
- Score interest
- Escalate to human when needed

Step 4: Define AI Control Rules (Critical)

AI can:

- Draft emails
- Analyze replies
- Ask clarification questions
- Create Odoo CRM entries

AI cannot:

- X Quote prices
- X Commit to timelines
- X Negotiate
- X Send WhatsApp without approval

PHASE 3 — OUTREACH EXECUTION

Step 5: Campaign Creation (Per Segment)

For each medical field:

- AI generates **custom cold outreach email**
- Message tailored to:
 - Specialty
 - Role
 - Value use-case (event, VR, training, booth)

Human approves:

- Email copy
- Subject lines
- CTA

Step 6: Send Campaign via Mailchimp

Process:

- n8n pulls segment from CDP
- Uploads temporary list to Mailchimp
- Sends campaign
- Deletes list after sending (cost control)

PHASE 4 — RESPONSE HANDLING & INTELLIGENCE

Step 7: Response Capture & AI Analysis

When a client replies (or does not reply within a defined window):

- n8n captures the email response (or detects no response)
- AI analyzes (if reply exists):
 - Intent
 - Interest level
 - Objections
 - Urgency
- AI classifies the outcome as one of the following states:
 - Hot lead
 - Warm lead
 - Curious
 - Not now
 - Not interested
 - No response

Database Update (Mandatory):

The CDP is updated with:

- Response status
- Interest score
- Last interaction date
- Current lifecycle state

Step 8: CRM Opportunity Creation (Conditional)

If $\text{interest} \geq \text{defined threshold}$ (Hot / Warm / Curious):

- AI creates a CRM opportunity in Odoo
- Assigns it to the Sales Director
- Logs in the opportunity:
 - Original outreach email
 - Client reply
 - AI interpretation
 - Suggested next step
- AI appears in Odoo as a system user:
 - 👉 “AI Sales Agent”

📌 **Database Update:**

- Client status updated to *Active Opportunity*
- Engagement score increased
- CRM reference linked to client record

PHASE 5 — HUMAN + AI CO-OPERATION

Step 9: Sales Director Instruction

Sales Director reviews the CRM opportunity and adds instructions such as:

- Ask for budget
- Invite to meeting
- Send case study
- Pause AI and take over

📌 **Database Update:**

- Instruction logged
- Ownership status updated (AI / Human / Hybrid)

Step 10: AI Executes or Pauses

- If AI is allowed to continue:
 - AI drafts and sends reply
 - Logs communication
 - Updates engagement score
- If AI is stopped:
 - AI freezes outbound communication
 - Human sales takes over

📌 **All actions are logged in both Odoo and the CDP.**

PHASE 6 — FOLLOW-UPS & RE-ENGAGEMENT (Conditional Paths)

Step 11: Automated Follow-Ups (No Response Case)

If **no response** after initial outreach:

- AI schedules follow-up emails (max N attempts, e.g. 3)
- Timing and tone are adjusted automatically
- If a reply occurs → flow returns to **Phase 4 (Step 7)**

Database Update:

- Follow-up count
- Last contact attempt
- Status = *Pending / Low Engagement*

Step 12: Dormant Client Re-Engagement (Long-Term Inactivity)

If client remains inactive after all follow-ups:

- AI sends a re-engagement message with a different tone
- Focus on new capabilities (AI, VR, new services)
- Lower frequency, value-based messaging

Database Update:

- Status set to *Dormant*
- Engagement score reduced
- Client kept for future low-frequency campaigns

4. FINAL OUTPUTS

Deliverables:

- Centralised client database
- AI Sales Agent with rules
- Automated segmented outreach
- Intelligent response handling
- Structured Odoo CRM opportunities
- Full audit trail of AI actions
- High-level of security across all these platforms

5. BUSINESS IMPACT

- Faster lead generation
- Better quality opportunities
- Reduced sales manual work
- Consistent messaging
- Scalable B2B outreach
- Strong positioning in KSA medical market

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