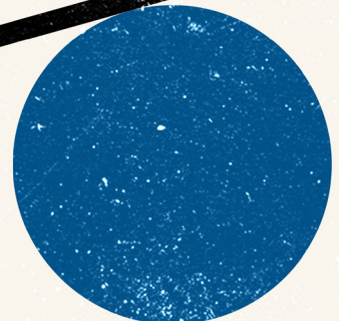


A Delicate Balance



Technology
accelerates
sales (until it
doesn't).



A Delicate Balance

Technology accelerates sales (until it doesn't).

BY PAUL NOLAN



The good news from a new survey of more than 5,000 B2B sales professionals by Salesforce is that sales are up. Nearly four in five teams report increases in both revenue and customer acquisition over the past 12 months. Moreover, 82% of sales professionals feel confident about their company's 12-month growth strategy, according to the report.

The less positive news in that [same report](#) is that 67% of sales reps don't expect to meet their quota this year, and a whopping 84% missed it last year.

With access to an unparalleled amount of sales enablement technology, AI-driven sales coaching tools, highly sophisticated CRM systems and copious amounts of customer and prospect data, how can more than 8 in 10 professional salespeople fall short of their quotas?

Some would argue it's due in large part because of the enormous amount of technology that has been incorporated into what once was an extremely person-to-person process.

A Teammate, Not a Tool

[Gartner reported last year](#) that a survey on seller productivity revealed that 49% of sellers are overwhelmed by the number of technologies needed to do their job. Revenue goals are at risk, as these sellers are 43% less likely to achieve quota than non-overwhelmed sellers, according to Gartner.

"To succeed, CSOs need to evolve the way sales technology supports sellers by elevating technology to become a teammate, rather than just being deployed as another tool," the Gartner report states.

Adnan Zijadic, director analyst in the Gartner Sales Practice, used [similar phrasing](#) at the Gartner CSO & Sales Leader Conference held earlier this year.

"While sellers are ready to embrace data-driven insights, leaders must prioritize equipping sellers with playbooks for effective selling that build that human connection through contextual understanding. Incorporating AI technology as a teammate will lead to sales playbooks that are more balanced while encouraging organizations to achieve competitive advantage," he said.

FEATURE STORY

'Yet Another Thing to Learn'

In an article entitled "[Sellers are Overwhelmed by Technology](#)," published by *Harvard Business Review* last year, Gartner Sales Practice analysts George Tobias, Craig Riley, Colleen Giblin and Betsy Gregory-Hosler state, "Technology has long been used to boost seller productivity, but sales leaders are telling us that efficiency gains have become slower and more expensive. This is because technology intended to help sell frequently makes the salesperson's job more cumbersome. From the salesperson's point of view, more technology hasn't made their job easier or less expansive — it's just been yet another thing to learn."

The Gartner team identified four stages of sales tech maturity:

- **Stage 1: Simple automation** – Salespeople use basic automation tools and AI that assist with simple activities. Technology supports efficiency, but its benefits depend on seller adoption.
- **Stage 2: Assisted selling** – Salespeople use AI-assisted automation tools to improve productivity. Technology is integrated into the sales process to provide passive assistance around prioritization and execution.
- **Stage 3: Automated selling** – Technology is a full part of the sales team and plays an active role in decision-making and execution.
- **Stage 4: Autonomous selling** – Technology can completely automate the sales process and make decisions on its own. Salespeople act as strategic overseers providing guidance and helping prioritize, but technology performs nearly all tasks.

Many organizations are stuck at Stage 2, the Gartner team states. Sales organizations that embrace technology as a teammate will advance to automated selling (Stage 3) quicker and gain a significant advantage in sales productivity.

Sales reps must get comfortable with technology owning some aspects of the sales process, including prospecting, CRM steps and other data capture, generating customized value messaging, and solution design. By doing so, they will free up their time to tackle the human aspects of sales in which they can add value.

"In the future, the role of the salesperson will be about doing fewer things, but doing them better. Sales leaders must combine the transformative power of AI with the uniquely human capabilities of their salespeople to drive high-margin deals," the authors state.

Tech As a Time Creator

Freeing up sellers' time is among the most important tasks of technology. According to the [Hubspot 2024 Sales Trends Report](#), sellers spend only one-third of their time actively selling. Use of AI tools to accomplish administrative tasks can save as much as two hours per day. "That's two extra hours for

McKinsey reports that leading sales teams have shown that effective automation focuses on four areas:

- **Lead management** – Lead prioritization and initial customer outreach
- **Contract drafting** – Automated responses to RFPs
- **Invoice generation** – Automatic generation of general invoices and updating of databases
- **Sales commission planning** – Machine learning algorithms help optimize sales commission forecasting, creating as much as a 50% decline in time spent on compensation planning

connecting with customers, building relationships, progressing pipeline, and of course, closing more deals," the report states.

"Let's say you want to send a message to an existing customer about a new product you just launched. Your customer platform has the demographic data for the customer; every webpage they visited, every transcript from every sales call, every customer support interaction. You have deep contextual data," states Hubspot founder Dharmesh Shah in the Trends Report.

[Forbes asked technology experts](#) last year about common mistakes that lead to overspending on technology. Jesse Stockall, chief architect at [Snow Software](#), a Stockholm-based provider of integrated software asset management systems, said tech stacks — plopping SaaS subscriptions on top of SaaS subscriptions — is a main culprit.

FEATURE STORY

“Many companies unknowingly overspend on cloud services and software as a service applications because they overestimate needed capacity or SaaS users during the initial purchase and/or allow tech purchases to happen outside of IT. Companies must regularly audit their tech stacks to right-size cloud environments and remove unnecessary SaaS application users, as well as train employees in FinOps,” Stockall stated.

Bots Don't Close Deals

On a recent conference call scheduled by Salesforce to preview its newly released “State of Sales” report, a journalist posited that both buyers and sellers are arming themselves with AI-driven tools to tackle large chunks of the buying process. How long will it be, he pondered, before buyers’ and sellers’ qualifying bots will hand things off to respective deal-making bots, and multimillion-dollar sales deals will never need to involve humans?

Unlikely, was the answer. Sales involves human connection. It’s what many professional salespeople enjoy most about their job.

Writing about the importance of the human element in B2B sales, Justin Zappulla, managing partner of sales training

company Janek Performance Group, [cites a LinkedIn study](#) from 2021 that found 65% of sellers believe they put the buyer first, but only 23% of buyers agree with that statement. He chalks a good deal of that discrepancy up to sellers’ overreliance on technology.

“When buyers feel like the salesperson does not understand their needs, is just another number, or does not appreciate the nuances of their business, no technology can unite that disconnect,” Zappulla states.

“Selling is a human endeavor. Technology can enhance outcomes in the sales process, but it requires all the pieces to work together,” he adds. “Building a healthy sales team is a lot like building a healthy body. Sure, it’s nice to have the Peloton, but eating your broccoli and avoiding ice cream is boring but effective. As they say in fitness, you can’t out-exercise a bad diet. In sales, you can’t out-technology bad behaviors. If you want your sales muscles to grow, you have to feed them right and exercise. Technology is a great tool to make sales reps more efficient, but it will rarely get you the full result on its own. Be sure to look at the whole picture when identifying and solving a sales performance problem.” **SMM**

Is Your Onboarding Process Over-Automated?

An effective onboarding process is a huge difference-maker in keeping top talent — and keeping them engaged — or losing them to competition that understands job satisfaction begins on Day 1.

Onboarding is increasingly being automated. That’s fine to a point, as it relieves stress on HR and increases efficiency. In today’s remote and hybrid work world, it makes sense to automate tedious tasks such as HR paperwork. Initial training and introduction to corporate culture can be handled by on-demand videos.

However, incorporating too much technology into the onboarding process can be risky. According to a survey by Glean, an AI-powered platform that allows employees to seamlessly search across all apps used at a company, the largest group

of workers say their employers fall short during the beginning stages of the employee experience. Out of the 2,000 hybrid and remote office workers surveyed, 81% admitted to feeling overwhelmed with information during the onboarding process, and 69% said they didn’t know how to find the necessary information when starting their current job.

Respondents to the survey reported using an average of 11 applications and platforms in their day-to-day work. An employee searches for documents or information an average of 35 times per week. Most employees, the survey reports, spend a median 13 minutes looking for what they need before asking for help.

“There is an increasingly large number of tools that companies are using,” says Arvind Jain, founder and CEO of

Glean. “Overload is universal, people are struggling, and newer workers are finding it very hard to onboard.”

Effective onboarding can be accomplished when much of the process is automated, but maintaining a human connection is essential. Building trust requires developing authentic relationships.

“It all starts with awareness of employee needs,” Jain said. “Business environments are increasingly complicated — companies will always have more data and more tools over time. Employers need to not only build tools that make it easy to stay connected to information, but also bring people together and build relationships.”

— Paul Nolan

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AI is a Game Changer for Sales Coaching

BY JULIE THOMAS

The use of generative AI in the workforce has nearly doubled in the last six months, with 75% of global knowledge workers now using it, according to [Microsoft and LinkedIn's 2024 Work Trend Index Annual Report](#). The report highlights that AI helps users save time (90%), focus on their most important work (85%), be more creative (84%), and enjoy their work more (83%).

For sales professionals, AI has become an indispensable tool, helping them quickly research companies, synthesize lengthy documents, and write personalized messages with unprecedented efficiency. Now, AI is revolutionizing sales coaching by providing sales managers with a novel solution to their persistent challenges.

Challenges in Sales Coaching

Sales managers have one of the most demanding jobs in the industry. They're expected to manage up to 10 direct reports, hit revenue goals and regularly coach their team.

Most sales leaders agree that investing in a continuous, formal coaching program will improve their team's performance and achieve bottom-line growth, yet obstacles get in the way. The three we see most often are:

- **Insufficient Coaching** – Managers often sideline coaching when pressed for time, or rarely receive the proper training to effectively coach their teams, and the skill sets required for sales management and coaching are worlds apart.
- **Limited Practice** – Lack of time often leads sales reps to practice on real prospects instead of using role playing to prepare. This is suboptimal for both the sales rep and the prospect.

- **Bias in Role-Playing** – Traditional role-playing with managers or peers can be affected by unconscious bias, which can negatively impact coaching decisions and interactions. Each of us harbors some form of unconscious bias, whether it's favoring—or being tougher on—your top performers.

Despite these roadblocks, sales coaching can be transformative: [McKinsey research](#) recommends investing in coaching skills and continuous capability-building. According to their sales DNA data, coaching sales reps has the biggest impact on capability development. And now that AI is available, it can be applied to many of these coaching skills, enabling reps to practice role playing more effectively, maximizing sales managers' time, delivering just-in-time learning, minimizing bias and more.

Benefits of AI in Sales Coaching

Sales coaching is about methodically developing salespeople to increase their performance through precise, constructive feedback that reinforces successful selling behaviors. Research conducted by ValueSelling Associates reveals that [60% of high-performing companies](#) use sales coaching as an integral part of their sales training program. and they are reaping significant rewards.

Integrating AI technology into your sales coaching practice offers substantial benefits for both sales reps and sales coaches. AI coaching tools that align with your sales process and methodology build desired selling behaviors, help sales reps improve in specific areas and remove bias in role-plays. Of course, the real impact depends on correctly leveraging these



technologies to augment human-to-human interactions — not replace real-world experience and emotional intelligence.

Connecting the art of human-to-human interaction with the science of AI is crucial. Blending AI with traditional coaching methods creates a dynamic, responsive and highly effective coaching environment that drives team success.

Three Ways AI Is Revolutionizing Sales Coaching

With an AI tool customized for sales coaching, sales leaders can now proactively implement sales coaching support for their teams as part of their sales strategy. Here are three ways AI is transforming sales coaching.

1. Just-in-Time Learning: AI tools offer specific learning resources to sales representatives at the exact moment of need, reinforcing desired selling behaviors. This empowers sales teams to progress opportunities independently, accelerating the process and reducing the necessity for direct supervision from their manager.

[Gartner research](#) highlights two powerful strategies that can be incorporated into coaching: behavioral nudges and just-in-time learning. “Behavioral nudges are interventions that alter behavior in a predictable way without forbidding options or significantly changing economic incentives, while just-in-time learning provides sellers with the exact information needed to execute an action when they need it.” Both of these strategies can be aided by an AI coaching tool.

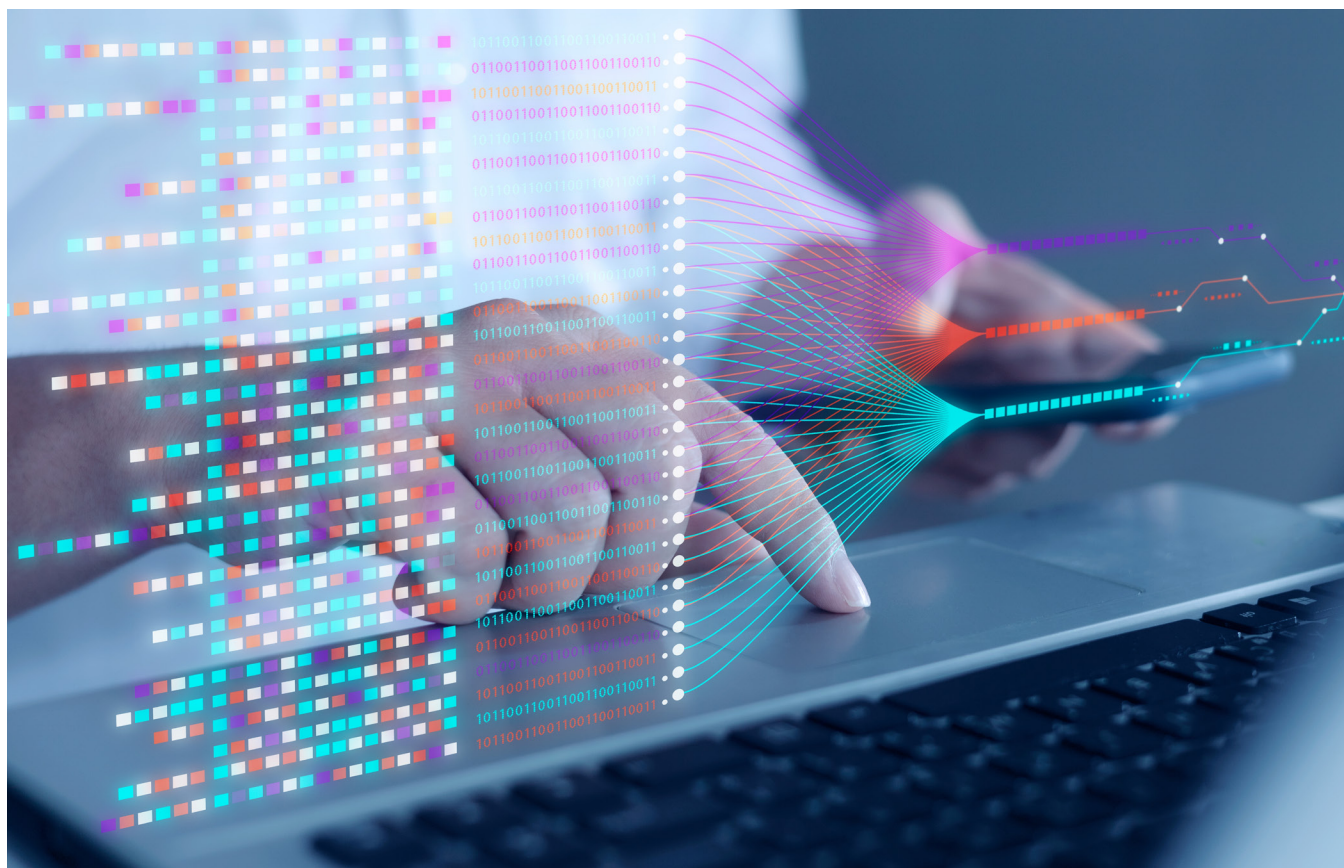
For instance, with the planned learning management system integrations for ValueSelling Associates’ [ValueCoach AI™](#) tool,

if a sales rep scores two out of five on objection handling on a sales call or role-play, the tool recommends specific just-in-time learning modules on how to handle sales objections as a next step in the learning process.

2. Role-Playing: AI-backed simulations and role-playing exercises offer practical experiences in a safe, risk-free environment. They are especially impactful when the AI model is trained on an organization’s unique sales methodology, sales process, ideal customer profiles (ICPs) and product/competitor data. AI supported simulations offer sales representatives immediate feedback on their content and delivery, enabling them to hone their skills. This, in turn, boosts their confidence and shifts their focus toward authenticity and relationship-building, enhancing their ability to effectively engage buyers. The result: closing bigger deals faster.

AI models can also assess real sales calls recordings, transcripts and notes from CRM systems. This data is used to evaluate sales rep behaviors, provide assessments, and trigger targeted learning resources to address specific areas of difficulty. For example, an AI tool can offer feedback such as “You talked more than the prospect. Based on your win rates with similar prospects, try asking questions like these in the first five minutes of your next call to get the prospect talking to learn more about their ideal solution.”

3. Individualized Coaching Plans: AI prioritizes coaching moments helping the manager focus on one issue at a time with the rep, rather than overwhelming them with too many things



at the same time. That's why a baseball coach doesn't suggest changes in a player's stance, swing and grip at once. They work with the player to first change their stance, then as the player builds muscle memory they'll start to adjust the swing, and down the road work on the grip.

These adaptive plans enhance the effectiveness of sales coaching while showing sales reps that their managers care about their growth and development. Coaching happens best when there's a trusted and genuine relationship between the coach and the rep.

This underscores the importance of pairing AI with human interaction. Sales reps instinctively know when their manager has their best interest at heart and will accept their feedback more seriously than purely automated feedback. This can boost morale and motivation within the team, leading to improved overall performance.

AI also removes bias without the drama. Without consciously realizing it, a manager may be tougher on one sales rep than another. AI doesn't care about opinion, seniority or past experiences; it only cares about data and facts rather than emotional assumption to make decisions and provide unbiased feedback aligned with the organization's specific sales process.

AI Complements Human Effort

Integrating AI into sales coaching enhances efficiency, fosters continuous improvement, and complements human interaction to cultivate a collaborative and successful sales environment

The integration of AI into sales coaching represents a pivotal advancement in the industry, transforming how sales teams operate and excel. As highlighted by the Microsoft and LinkedIn 2024 Work Trend Index Annual Report, the widespread adoption of generative AI among knowledge workers underscores its effectiveness in saving time, enhancing focus, fostering creativity, and increasing job satisfaction.

By bridging the gap between traditional coaching methods and technological innovation, AI facilitates personalized learning experiences, real-time feedback through simulations and unbiased performance evaluations. These advancements accelerate skill development, and cultivate a culture of continuous improvement within sales teams. Moreover, AI's ability to adapt and refine coaching strategies based on real-time data ensures relevance and effectiveness in an ever-evolving market landscape.

While AI streamlines processes and enhances productivity, its true impact lies in complementing rather than replacing human interaction. By integrating AI insights with the nuanced understanding and empathy of human sales coaches, organizations can foster deeper connections, trust, and mutual respect among team members. This synergistic approach not only drives individual performance but also cultivates a collaborative environment where every sales professional can thrive and exceed expectations. **SMIM**

Julie Thomas, president and CEO of [ValueSelling Associates](#), is a noted speaker, consultant and the author of "The Power of Value Selling: The Gold Standard to Drive Revenue and Create Customers for Life."

Will Your Next Rep Be a Bot?

AI compliments salespeople, but it won't replace them. Are we sure about that?

More than half of the average buying process today is completed before contact with a sales representative is made. Forrester research shows that 68% of buyers prefer not to deal with a sales rep at all.

So how can it be said with certainty that advancements in AI, which are sure to come, will not make sales reps obsolete?

An article entitled "[5 Reasons Why AI Will Never Replace Salespeople](#)" on a LinkedIn discussion page called The Daily Sales, tried to make that case. Here is the reasoning.

- **The human touch** – Building relationships, emotional intelligence and empathy – all things AI is not (currently) capable of – are core elements of successful sales.
- **Complex problem solving** – Sales requires probing questions and complex problem solving that AI cannot master.
- **Personalizing customer experience** – AI can provide insights that assists with personalization, but it is not able to develop the deep understanding necessary to build trust and respect.
- **Strategic thinking** – It is a salesperson's strategic thinking that turns AI-generated insights into a **competitive advantage**.
- **Human judgement** – AI has no moral compass. Salespeople can navigate complex ethical situations, make decisions that reflect their values, and maintain the trust of their clients.

Are you convinced AI will be a team maker, not a team breaker? A dissenting commenter on the LinkedIn post stated, "Most of the points outlined, ChatGPT can already do. What's ironic, though, is this article is AI-generated and nobody caught that. Imagine what AI can do in 5-10 years."



SOURCE: SALESFORCE "STATE OF SALES" REPORT (2024)

CRMs are Getting Smarter and Humanizing Outbound Sales

BY ANTOINE LEFEUVRE

Outbound sales is changing on macro and micro levels, shifting to a digital-first approach. Until recently, you still had initial outreach efforts where sales reps were making phone calls and walking up to a business address and shaking someone's hand. Only a handful of pioneers were using sales automation and tech stacks. Today, it's standard business practice. The differentiator for businesses now and going forward is really how these tools are being used.

We're moving away from industrialized digital overload.

Outbound sales has become more digital. With automation and multichannel tools, businesses can easily scale their outreach efforts. However, it's important that businesses are truly scaling and not industrializing their approach.

For example, each business has its ideal customer profile (ICP) that it targets, comprised of company size, title, etc. Their teams automate lead collection on LinkedIn to build their network and their prospect list, and then they use their CRM to start contacting these leads through nurturing sequences.

This is a highly effective way to gather leads, but it can also contribute to overload if prospects are being entered into a sequence where they don't belong.

Brands need to dig deeper into their ICP to find the criteria that signals this prospect is ready for outreach. Valuable indicators might include company activity such as mergers, expansions, job postings, webinar attendance and so forth.

A fintech ICP, for example, might target companies that are hiring a financial analyst. This criteria suggests that this prospect is changing a relevant business process and potentially needs a new tool, signaling a strong opportunity for conversion.

As it stands now, our users already detect hyper-refined signals with automation workflows to gather intel, machine learning to enrich and segment prospects, and instant notifications so sales reps never miss a beat. The UX is just going to become a whole lot more seamless as we continue incorporating AI.

AI allows teams to be more human.

As machines get more powerful, AI will play an increasingly central role in analyzing data and signaling to businesses when a prospect has the most potential for conversion. It'll no longer be human teams setting up automation triggers to find the ideal moment; AI will.

However, the more that cold outreach becomes automated, the more buyers will look for and value human interactions. Businesses should use AI to carry out routine and analytical processes so sales reps spend less time on top-of-the-funnel tasks and more time engaging accounts.



AI can act as an internal coach and review your sales processes to find red flags. Say your email campaigns aren't performing well, then your team can switch to SMS for particular segments.

It can also help you evaluate the performance of your team and see where they're having difficulty. With less time spent doing reporting and performance analysis, managers can dedicate time to training stronger reps.

As CRMs get smarter with integrated AI functionalities, humans will do fewer manual tasks and be free to engage their prospects and their teams. Buyers will get more qualitative sales information and valuable in-person interactions, and internal teams will get more face time with and training from their managers.

Antoine Lefeuvre, Head of Sales and Service at Brevo, is an expert on the tools businesses need for successful sales. He and his team consistently analyze the market and listen closely to what clients need to ensure Brevo equips them with the features that will always keep them one step ahead.

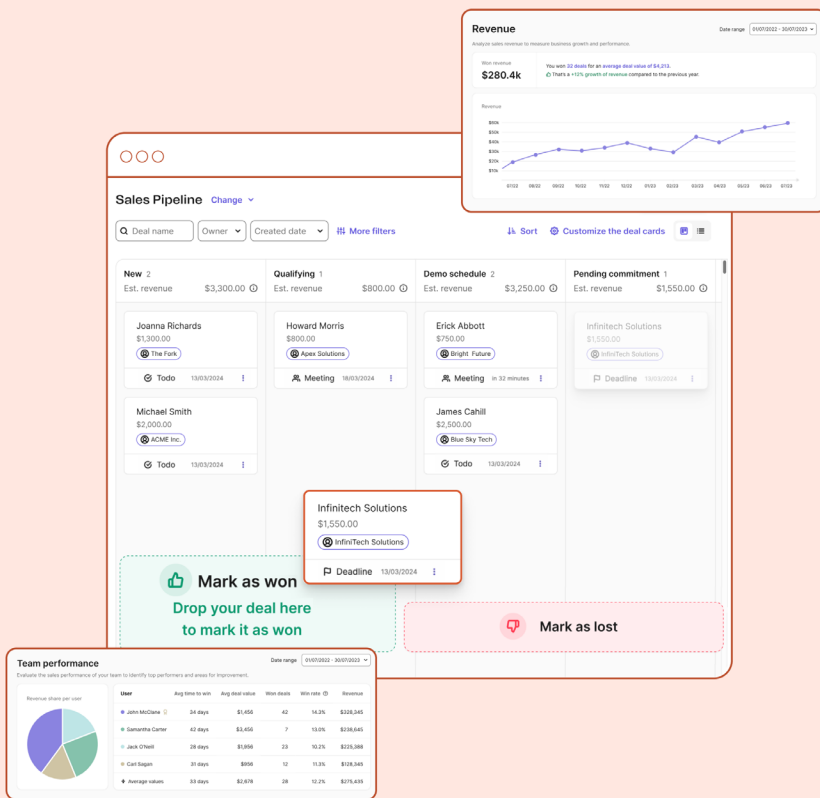
Next Steps

At Brevo, makers of a cloud-based software suite that helps businesses manage customer relationships, our trajectory is to provide flawless coordination between sales processes and empower teams to make an impact. We're on a mission to develop a smart CRM that will put the human back in the driver's seat. Visit www.brevo.com to learn more.

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Kevin Yen
Head of Growth at AI Camp



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The Rise and Fall of Sales Engagement Tools

Maintaining effectiveness while adapting to tighter regulations

BY LOGAN KELLY

In the rapidly evolving digital landscape, sales engagement tools have carved out a niche for themselves by revolutionizing how businesses approach sales and customer engagement. These platforms have empowered sales teams with automated workflows, personalized outreach capabilities and comprehensive analytics to optimize their sales strategies.

However, as these tools soared in popularity and utility, they also encountered significant challenges, particularly in the face of stricter spam laws globally. This article explores the journey of sales engagement tools, highlighting their rise to prominence, the challenges imposed by new regulations, and the path forward for sustainable sales practices.

Faster, Personalized and More Effective

Sales engagement platforms emerged as a solution to the increasing complexity and scale of sales operations. These tools provided sales teams with the ability to automate repetitive tasks, personalize communications at scale, and track the effectiveness of their strategies in real-time. This automation and personalization capability led to more efficient sales processes, higher conversion rates and, ultimately, more robust

sales pipelines. The appeal was clear: sales teams could do more with less, reaching out to prospects with tailored messages while leveraging data analytics to refine their approach continually.

The golden era of sales engagement tools was marked by rapid adoption and growth. Companies across industries integrated these platforms into their sales strategies, driven by the promise of increased efficiency and effectiveness. The ability to automate outreach and follow-ups, coupled with the insights generated from engagement analytics, allowed sales teams to focus on high-value activities and build stronger, more meaningful relationships with potential customers.

During this period, the success stories were numerous, with businesses reporting significant improvements in lead generation, engagement rates, and overall sales performance.

However, the landscape began to shift as regulatory bodies around the world started to take a closer look at digital communication practices. The introduction of stricter spam laws, such as the GDPR in Europe and similar regulations in other regions, aimed to protect consumers from unsolicited and

intrusive marketing messages. These laws imposed stringent requirements on businesses regarding consent, data protection and the right to opt-out of communications, significantly impacting how sales engagement could be conducted.

Increased Scrutiny

For sales engagement platforms, this meant a drastic reevaluation of their operational frameworks. The very features that made these tools powerful – automated outreach and mass personalization – were now under scrutiny. Sales teams had to navigate the fine line between engaging prospects and violating privacy and consent regulations. The challenge was not just technical but also ethical, requiring a shift towards more transparent and consent-based marketing and sales practices.

The tightening of spam laws led to a period of adjustment, where the effectiveness of sales engagement tools was questioned. Companies had to rethink their strategies, focusing on building genuine connections with prospects rather than relying on the sheer volume of outreach. This period, often viewed as a fall, was also a time of rebirth for the sales engagement sector. It prompted innovation, with platforms evolving to offer more sophisticated targeting, enhanced consent management features, and tools that prioritize user privacy and regulatory compliance.

The future of sales engagement tools lies in their ability to adapt to the changing regulatory landscape while continuing

to offer value to sales teams. This involves a shift toward more strategic, consent-based engagement practices that respect consumer preferences and legal requirements. Tools that can balance personalization with privacy and automation with authenticity will lead the way, helping businesses to engage with prospects in a manner that is both effective and ethical.

Adapt and Thrive

The journey of sales engagement tools through the rise, the challenges imposed by stricter spam laws, and their ongoing evolution highlights the dynamic nature of digital sales practices. As we move forward, the key to success for sales engagement platforms and the businesses that rely on them will be their ability to navigate the regulatory environment without losing sight of their core objective: to foster meaningful connections between businesses and their customers.

The rise and fall of these tools is not just a narrative of technological innovation but a reminder of the importance of adapting to a world where consumer rights and digital ethics are at the forefront of business operations. **SMM**

Logan Kelly is founder and president of [CallSine](#), an email outreach platform designed for salespeople and teams seeking to send individualized emails to each prospect. Kelly is an AI innovator and entrepreneur with extensive experience leveraging cutting-edge technologies to create impactful solutions.

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