COURSE SYLLABUS

AI for Sales Professionals

Use Claude for prospect research, proposals, follow-up messages, objection handling, and pipeline analysis. Build a workflow for your role.

Group classes (NYC) and onsite training are available for this course. For more information, email corporate@nobledesktop.com or visit: https://training-nyc.com/courses/ai-for-sales-professionals



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Course Outline

Module 1: Getting Started with Claude AI

- Explain how Claude works in plain language and identify the model tiers, plans, and interface
- Understand the context window, how Claude processes information, and when to start new conversations
- Practice your first Claude conversation using a sales-specific prompt
- Identify what Claude does well, what it doesn't, and when human judgment is essential

Module 2: Prompting Fundamentals

- Apply the five-part prompt framework: context, task, format, constraints, and examples
- Write effective prompts across five use cases: writing, summarization, analysis, research, and creative problem-solving
- Recognize and fix common prompting mistakes that produce vague or unusable output
- Practice prompting with sales scenarios: drafting a prospect follow-up email, summarizing an RFP, and writing a discovery call prep brief

Module 3: Working with Files & Documents

- Upload and analyze images, PDFs, spreadsheets, and documents directly in Claude
- Use Claude to extract, compare, and summarize information from uploaded files
- Work with sales-specific file types: RFPs, proposals, pipeline exports, CRM screenshots, and competitive intelligence reports
- Complete a hands-on file analysis exercise using provided sales sample documents

Module 4: Projects & Knowledge Bases

- Explain how Projects use custom instructions and knowledge bases to organize ongoing work
- Write effective Project instructions that encode your role, audience, format preferences, and rules
- Upload reference documents and understand how RAG retrieves relevant content
- Create a sales Project for a major deal pursuit using your company's solution one-pager, a prospect brief, and a sample proposal

Module 5: Artifacts, Styles, Memory & Usage Management

- Create reusable deliverables with Artifacts and edit them directly or through conversation
- Build custom Styles that match your professional communication voice
- Configure Memory to retain key context about you and your work across conversations

- Apply usage management techniques to extend your plan value

Module 6: Advanced Prompting & AI Tool Selection

- Use role-based prompting, chain-of-thought reasoning, and multi-step workflows
- Apply Extended Thinking, web search, and the You Ask Me technique for complex tasks
- Compare Claude with ChatGPT, Copilot, and Gemini to choose the right tool for each task
- Practice advanced prompting with sales scenarios: diagnosing a stalled deal, building a multi-touch outreach sequence, and preparing for a negotiation

Module 7: Introduction to Claude Cowork

- Explain what Cowork is and how it differs from the claude.ai chat interface
- Read, write, and manage files from your desktop environment
- Configure guardrails, file permissions, and network settings for safe use
- Understand prompt injection risks and how to protect against them

Module 8: Context System, Connectors & Integrations

- Build foundational context files and set Global Instructions that apply to every Cowork session
- Connect Claude to Slack, Google Drive, Gmail, and other workplace tools
- Use Claude natively in Excel and PowerPoint with the Office add-ins
- Configure your context system and connections for sales workflows, including pipeline analysis in Excel and deal presentations in PowerPoint

Module 9: AI for Sales — Core Workflows

- Use Claude and web search to produce one-page prospect research briefs with company overview, recent news, likely pain points, and conversation starters
- Draft customized proposals and RFP responses using your solution documentation and the prospect’s stated requirements
- Build objection-handling scripts with evidence-based responses and competitive positioning against key rivals
- Analyze a pipeline export to identify at-risk deals, stalled opportunities, and priority actions for the week
- Complete a hands-on lab producing a multi-document sales content package

Module 10: Capstone — Build Your Sales Claude System

- Audit your sales tasks and identify the highest-value opportunities for Claude assistance
- Configure a personalized sales Claude system: Projects, context files, Styles, and connected tools
- Run a complete end-to-end deal pursuit workflow: prospect brief, customized proposal, competitive positioning document, and a three-email follow-up sequence
- Create a Week 1 action plan for applying what you’ve learned to your sales role