



TIDEWATER



Rewiring Revenue

Incorporating AI into Sales Operations for Small and Mid-Sized Businesses and Manufacturing Companies



Tidewater Solutions Group, LLC

TABLE OF CONTENTS

01

CURRENT STATE

- Reveals the gap between AI's potential and its limited adoption in SMB sales, while showing early adopters are already seeing measurable revenue gains.

02

OPPORTUNITIES

- AI empowers SMBs to scale smarter by enhancing productivity, engagement, and decision-making across core sales functions through targeted, insight-driven tools.

03

DANGERS

- AI can unlock growth for SMBs, but without proper governance, it poses risks like data breaches, bias, skill loss, and misinformation that must be actively managed.

04

EXECUTION

- Effective AI execution requires SMBs to move beyond experimentation by building foundational processes, governance, and training—aligning people, tools, and strategy to drive sustained, scalable growth.

CURRENT STATE

AI IN SALES: THE PROMISE, THE GAP, AND THE TURNING TIDE

In 2025, the integration of Artificial Intelligence (AI) into sales operations remains a significant challenge for small and mid-sized businesses (SMBs) and manufacturing companies. According to Sales Xceleration's Sales Agility Assessment, **a staggering 85% of SMBs rate their use of automation and AI sales tools as "Poor," with only 12% considering themselves "Excellent"** in this domain.

This data underscores a substantial gap between the potential of AI in sales and its actual adoption among SMBs and manufacturers. While larger enterprises are rapidly embracing AI to enhance their sales processes, many SMBs and manufacturers lag due to factors such as limited resources, lack of expertise, and concerns about implementation complexity.

However, the tide is beginning to turn. A recent Salesforce survey revealed that 91% of SMBs leveraging AI reported a boost in revenue, highlighting the transformative potential of AI when effectively implemented.

"SMBs are overwhelmed by choice, constrained by budget, and unsure where to start. Many see AI as a corporate tool, not a small business advantage."

— Jane Hsu, VP of SMB Strategy, Forrester



Excellent



Average



Below Average



Poor



OPPORTUNITY

AI AS A FORCE MULTIPLIER: UNLOCKING SMART GROWTH ACROSS THE SALES LIFECYCLE

Artificial Intelligence opens the door to a smarter, more efficient sales engine—especially for small and mid-sized businesses (SMBs) and manufacturing companies that face resource constraints and growing market pressure. With the right approach, AI can transform a sales organization from reactive and manual to proactive and insight-driven. The opportunity lies not in replacing human effort, but in augmenting sales teams with tools that take the busywork off their plates, surface critical insights, and deliver a better experience to buyers.

Let's explore five key domains of sales enablement where AI creates measurable value, along with top tools leading the way in each category.

1. Sales Productivity

AI can dramatically increase productivity by automating repetitive tasks like data entry, meeting follow-ups, and forecasting. These gains free up time for sales reps to focus on what they do best—building relationships and closing deals.

Top Tools & Capabilities:

- Outreach: An AI-powered sales execution platform that automates follow-ups, sequences, and scheduling. Outreach uses machine learning to analyze historical email and call data, optimizing the next-best action for reps. *Case Example:* A mid-sized SaaS company improved rep productivity by 30% and increased qualified meetings by 22% after implementing Outreach.
- Clari: Specializes in revenue forecasting and pipeline visibility using AI. Clari pulls real-time signals from emails, calls, and CRM updates to give leaders a clear view of deal health. *Quote:* "Clari has allowed us to move from gut-driven forecasting to data-backed decision-making." – VP of Sales, Global FinTech Company.
- Drift Email: Automates email triage by categorizing and routing incoming emails to the right person or action. It also generates automated responses for FAQs or scheduling. *Value:* Reduces manual email handling time by 40–60% for many teams.



2. Customer Engagement

AI enables personalized, timely, and context-rich engagement across the buyer's journey. It learns from buyer behavior and crafts tailored experiences at scale.

Top Tools & Capabilities:

- Gong: Records and analyzes sales calls to uncover buyer sentiment, identify talk-time imbalances, and surface objections. AI suggests coaching areas and best practices based on patterns across top-performing reps. Case Example: A B2B manufacturer reduced sales cycle length by 20% and improved close rates by coaching teams using Gong's conversation intelligence.
- Conversica: An AI-powered "digital assistant" that engages leads via email and SMS to qualify and route them to reps. It communicates like a human, ensuring no lead is left behind. Quote: "Conversica doubled our lead conversion rate by ensuring consistent follow-up across all inbound traffic." – Marketing Director, Healthcare Software Provider.
- Lavender: A real-time AI email coach that analyzes tone, length, clarity, and personalization of prospecting emails—helping reps write better emails faster. Value: Reduces email creation time by 40% while improving open and response rates.

3. Marketing Optimization — Lead Generation

AI helps marketing and sales teams target the right audience with the right message at the right time. It predicts buying intent, scores leads, and enhances campaign precision.

Top Tools & Capabilities:

- KnowledgeNet.ai: Integrates data from across your digital ecosystem—including CRMs, call notes, marketing campaigns, and customer conversations—to create a centralized, AI-powered intelligence engine. This enables sales and marketing teams to connect the dots across platforms, identify engagement signals, and tailor messaging more effectively. Advantage: Streamlines lead qualification and message relevance by surfacing contextual, relationship-based insights that often get lost in silos.
- Apollo.io: Combines B2B contact data with buyer intent signals and automated outreach capabilities. Great for SMBs looking to scale top-of-funnel activity with limited resources. Use Case: A logistics company built a new outbound motion with Apollo and increased pipeline generation by 3X in 90 days.

- 6sense: Provides predictive analytics and buying stage intelligence. It identifies in-market buyers, reveals anonymous website visitors, and aligns marketing and sales around true buyer behavior. Expert Insight: "6sense is like X-ray vision for sales teams. You can see who's getting ready to buy—even before they raise their hand." – Sr. Analyst, Forrester.
- ZoomInfo Copilot (formerly Chorus): Enhances targeting by surfacing company and contact-level insights in real time, often tied to organizational initiatives or tech stack changes. Value: Enables hyper-personalized outreach based on real-time buying triggers.

4. Competitive Intelligence

AI can ingest and synthesize vast amounts of market data—from press releases to pricing updates—to keep your sales team competitive and informed.

Top Tools & Capabilities:

- Crayon: Tracks competitors across digital channels (websites, reviews, product pages) and uses AI to summarize key changes and trends. It alerts sales teams when a competitor launches a new product or changes positioning. Benefit: Equips reps with fresh talking points and differentiation strategies in near real-time.
- Kompyte: Offers AI-driven battlecards and competitive alerts based on real-time web crawling. It integrates directly into CRM tools to arm reps with insights at the point of sale. Impact: Reps using Kompyte battlecards report win rate improvements of up to 15% in competitive deals.



- **AlphaSense:** Ideal for strategic sales and BD roles, AlphaSense applies NLP to financial documents, earnings calls, and analyst reports to surface key insights about prospects and competitors. Quote: “With AlphaSense, we shortened our enterprise account planning cycles by weeks.” – Strategic Accounts Director, Industrial Technology Company.

5. Collaboration and Team Support

AI can streamline collaboration across departments and ensure alignment from marketing through to customer success, especially in hybrid or remote-first environments.

Top Tools & Capabilities:

- **Scribe:** Scribe automatically documents workflows by capturing user actions in real time, then turns them into visual step-by-step guides. This allows teams to create scalable, shareable training content without manual effort. Use Case: A 75-person software firm reduced onboarding time by 40% and eliminated ad hoc process documentation by incorporating Scribe into their sales enablement program.
- **Notion AI:** Useful for building internal knowledge bases, documenting SOPs, and creating centralized playbooks. Notion AI can summarize meetings, transcribe calls, and generate action items for cross-functional teams. Value: Reduces admin work for sales ops and enhances internal visibility across deals.
- **Fireflies.ai:** Automatically records, transcribes, and summarizes meetings—then syncs insights to your CRM or project tools. Result: Teams cut note-taking time by 80%, ensuring nothing falls through the cracks.

These tools or others of your choosing, when integrated into a cohesive tech stack and aligned to your broader business strategy, can dramatically elevate how a sales organization operates. The true power lies not just in the functionality of each tool, but in how well they work together—sharing data, surfacing insights, and enabling a seamless workflow across marketing, sales, and customer success. AI-powered platforms like Apollo, 6sense, ZoomInfo, KnowledgeNet.ai, and others can be even more impactful when they’re not operating in isolation but as part of an intentionally designed ecosystem tailored to your business model, team structure, and growth objectives.

But the key isn’t just choosing the “right” tools—it’s about choosing the right tools for your stage, sales maturity, and buyer journey. A fragmented stack leads to friction, missed insights, and wasted investment. A well-integrated stack, on the other hand, aligns people, processes, and technology in a way that amplifies each team member’s effectiveness and supports your revenue strategy end-to-end.

The role of AI in sales is not merely functional—it is transformational. And for SMBs willing to invest in learning, adoption, and refinement, it becomes a true force multiplier, helping small teams perform like large ones, increasing agility, and improving the customer experience at every touchpoint.

DANGERS

DANGERS IN THE DATA STREAM: NAVIGATING AI'S HIDDEN RISKS IN SALES ENABLEMENT

The rush to incorporate AI into sales workflows often focuses on the promise of speed, scale, and productivity. But beneath the surface lies a complex web of risks—some technical, others ethical—that must be acknowledged and managed if small and mid-sized businesses (SMBs) are to reap AI's full benefits safely.

As Gartner noted in its 2025 "AI Risk Trends" report, **more than 50% of AI projects fail to reach production due to governance or security concerns**. For SMBs, the stakes are even higher: a single data breach or botched implementation can jeopardize trust, compliance, and competitive positioning.

Let's break down the five primary danger zones and what responsible businesses must do to address them.

1. Data Privacy & Unauthorized Access

AI tools require vast amounts of data to function effectively—sales call recordings, email transcripts, CRM notes, customer profiles, and even purchasing behavior. The risk? That this data is mismanaged, accessed by unauthorized parties, or stored without appropriate safeguards. *Real-World Risk*: In 2023, a mid-sized U.S.-based tech consultancy experienced a breach after integrating a generative AI chatbot into their CRM system. The bot's training set included sensitive client contract terms, which were inadvertently exposed in a data scrape. The result? Legal disputes, lost contracts, and a hit to brand reputation.

Mitigation Strategy:

- Data minimization: Only feed tools the data they truly need.
- Encryption in transit and at rest: Ensure AI vendors comply with SOC 2, GDPR, and HIPAA (if applicable).
- Audit trails and access control: Use role-based permissions and monitor data flows across systems.



2. Bias and Discrimination in AI Recommendations

AI learns from the data it's trained on—and if that data reflects biased historical behavior, it can perpetuate or even amplify that bias. In sales, this can lead to inequitable lead scoring, unfair territory assignments, or exclusionary outreach patterns. *Example:* A national B2C company used an AI lead scoring tool that deprioritized leads from ZIP codes associated with low historical sales. But this was because previous reps had neglected those areas—not because the leads weren't valuable. The result was a self-fulfilling cycle of exclusion.

Mitigation Strategy:

- Train AI models on diverse, representative datasets.
- Regularly audit lead scoring and prioritization logic for discriminatory patterns.
- Use explainable AI tools that offer transparency on how decisions are made. *Expert Quote:* “You need a human in the loop. AI is an assistant—not a decision-maker.” – Kathy Baxter, Principal Architect, Ethical AI Practice, Salesforce.

3. Over-Reliance and Sales Skill Atrophy

AI can make work easier—but too much dependence on it can cause sales reps to lose touch with core skills. For instance, reps who overly rely on AI to write prospecting emails or handle objection responses may find themselves struggling in live conversations. *Example:* A distributed sales team implemented AI-generated call summaries and email responses. Within months, managers noticed junior reps could no longer articulate the value prop without script support.

Mitigation Strategy:

- Combine AI with ongoing sales training.
- Create “manual practice days” where teams operate without AI support.
- Monitor for overuse and coach reps on maintaining foundational skills.

4. Integration & Workflow Disruption

Adding a powerful AI tool to a broken system doesn't fix the system—it can make it worse. Without clear alignment to workflows, AI integrations often lead to confusion, conflicting data sources, and disjointed customer experiences.

Example: A specialty contractor deployed two separate AI tools—one for scheduling demos and one for sales forecasting. The tools operated independently and delivered contradictory outputs, undermining trust across the sales team.

Mitigation Strategy:

- Ensure tight alignment between AI and core systems (CRM, ERP, marketing automation).
- Start with one use case, test deeply, and expand from there.
- Map AI tools to clearly defined workflows to prevent silos and friction.



5. AI “Hallucinations” and Fabricated Content

Large language models (LLMs), while impressive, can generate confident-sounding yet false information. In the sales context, this could mean AI suggesting fake stats, citing non-existent clients, or misrepresenting product capabilities in emails or presentations. *Example: A rep using an AI email writer accidentally sent a message referencing “customer results from a Fortune 50 account” that didn’t exist. The client requested proof—forcing an embarrassing backpedal.*

Mitigation Strategy:

- Require human review and approval of all AI-generated client-facing content.
- Use AI tools that support fact-checking and citation tracking (like Jasper or Grammarly Business).
- Set clear usage policies: AI is for drafting, not approving or asserting facts.



Governance Protocols to Mitigate Risk

To create a safe, effective environment for AI, SMBs must implement standardized governance protocols across their sales organization. This includes:

- **Oversight Teams:** Create a cross-functional group with stakeholders from Sales, IT, Legal, and Operations to review tools before deployment and continuously monitor usage.
 - **Support Teams:** Provide in-house or fractional experts (e.g., from Tidewater Solutions Group) to train teams, troubleshoot tools, and drive adoption best practices.
 - **AI Usage SOPs:** Include these in sales playbooks and onboarding documents. Define what tools are used, when, and how.
 - **Dashboards and Reporting:** Implement visual dashboards that track AI tool usage, performance impact, security incidents, and user feedback.
 - **Role-Based Permissions:** Not all employees should have the same access to AI outputs or underlying data. Use CRM role hierarchies to restrict access where needed.
- Analyst Insight:** “AI governance is not a luxury—it’s a requirement. It’s what separates leaders from liability.” – John Santoro, Principal Analyst, Gartner Research.



EXECUTION

FROM CONCEPT TO CAPABILITY

While the allure of AI's promise is powerful, the difference between experimentation and transformation lies in execution. Far too many organizations race to adopt AI tools without the foundational infrastructure—organizational readiness, sales process clarity, data hygiene, and governance models—that allow AI to be deployed with consistency and impact.

To implement AI with precision and sustainability, SMBs must shift from opportunistic use to strategic orchestration. This involves codifying best practices into SOPs and playbooks, creating transparent oversight systems, and aligning people, process, and technology through continuous feedback and refinement.

Here are the core pillars of effective execution.

1. Codified SOPs and Guardrails for AI Use

Standard Operating Procedures (SOPs) ensure that AI tools are used responsibly and consistently across the sales organization. These documents serve as both operational manuals and compliance guardrails.

Key Elements of AI SOPs Include:

- Tool purpose and approved use cases (e.g., *Gong is for call analysis and coaching; not for customer sentiment prediction outside trained datasets*)
- Data access permissions by role (e.g., *frontline reps see only their own AI-generated summaries; managers see team-level insights*)
- Data input protocols (e.g., *What data can be uploaded or integrated? What must be anonymized?*)
- Escalation and reporting structure (e.g., *Whom to notify if AI outputs an inappropriate or erroneous result?*)
- Ethical boundaries and disclaimers (e.g., *AI-generated emails must include human oversight and final approval before sending*)

Execution Tip: These SOPs should live in a centralized, searchable knowledge base (such as Notion, Confluence, or SharePoint), and be updated quarterly as tools and risks evolve.



2. AI-Integrated Sales Playbooks

Sales playbooks must evolve to reflect modern selling environments, including how AI augments each stage of the buyer journey. A well-crafted playbook is not only tactical—it embeds AI into the methodology and motion of the sales process.

AI-Enabled Playbook Elements:

- Prospecting workflows using AI to identify high-intent buyers from tools like 6sense or Apollo.io
- Email & call engagement templates enhanced with real-time optimization from Lavender or Drift
- Qualification stages with automated insights (e.g., using Gong to analyze call quality and sentiment)
- Forecasting and pipeline reviews powered by Clari's real-time CRM syncing and deal inspection
- Post-sale handoff protocols including AI-generated meeting summaries pushed to customer success teams
-

Strategic Alignment: These AI touches should not exist in silos; they must be choreographed across marketing, sales, and customer success to deliver a cohesive customer experience.

3. Reporting, Dashboards, and KPIs

To measure effectiveness, improve adoption, and ensure accountability, you need visibility into how AI tools are being used—and what outcomes they are driving. AI may automate analysis, but you must still analyze the AI.

Effective AI Reporting Dashboards Should Include:

- Utilization Metrics: % of reps actively using AI tools, # of sessions per user, time spent
- Impact Metrics: Conversion rate change, win rate lift, sales cycle duration delta pre/post-AI
- Performance Insights: Which reps improve most with AI assistance? Which AI tools correlate with top deals?
- Feedback Loops: Prompts for reps to flag hallucinated outputs, irrelevant suggestions, or bugs in real time

Platforms such as Salesforce, HubSpot, Clari, Tableau, or Power BI can integrate AI usage data alongside sales outcomes to create a unified command center for sales leadership.

4. Enablement, Support, and Change Management

Even the best AI tools fail if the team isn't trained, supported, and coached on how to extract value. AI adoption is less a technology project and more a behavioral transformation initiative. As such, enablement plays a central role in successful execution.

Recommended Support Infrastructure:

- Sales Enablement Leaders: Responsible for developing AI training tracks, onboarding guides, and role-play sessions.
- Fractional or In-House AI Champions: Subject matter experts who demo tools, troubleshoot problems, and evangelize use cases across the team.
- Cross-Functional Governance Teams: Include Sales Ops, IT, Legal, and RevOps to continuously evaluate performance, compliance, and evolving needs.
- Feedback Mechanisms: Set up regular (e.g., monthly) AI health checks—short team surveys, use case reviews, and tool satisfaction scoring—to keep a pulse on adoption barriers or enhancement needs.

Cultural Insight: Reps must be coached to see AI not as surveillance or threat, but as a performance co-pilot. Your messaging, reward structures, and coaching cadence must reinforce this paradigm.

5. Continuous Improvement Loops

AI systems are not static—models learn, integrations evolve, and user behavior shifts. Execution excellence requires that AI adoption itself is treated as a continuous improvement loop, not a one-time initiative.

How to Operationalize Continuous Improvement:

- Set quarterly AI impact review sessions with your governance team.
- Run pilot tests for any new tools before full rollout.
- Identify high-performing reps and codify their AI-enabled workflows.
- Conduct retrospectives on deals won/lost with AI involvement and refine playbooks accordingly.

Mature organizations treat AI the way elite sales teams treat their pipeline: dynamic, structured, and always under scrutiny.

6. Building Organizational Readiness

Before going live with any AI-enabled process, assess your organizational readiness:

- Do you have clean, structured, and accessible data?
- Is your CRM up to date and being used consistently?
- Do your reps have the digital fluency to engage with AI workflows?
- Have you mapped AI use cases to your Ideal Customer Profile (ICP) and Buyer Journey?
- Have you secured executive sponsorship to make AI adoption a priority?

Without these foundational elements, AI will struggle to deliver the promised outcomes—and may erode trust in technology initiatives.



TIDEWATER
Solutions Group, LLC

In summary, effective execution of AI in sales requires far more than installing a shiny new tool. It involves cross-functional coordination, redefined workflows, new governance mechanisms, and ongoing investment in people and process. For SMBs, especially those operating without a dedicated RevOps or Sales Enablement function, it's often critical to engage a trusted outside advisor to provide structure, experience, and accountability.



AI IS NO LONGER OPTIONAL IN MODERN SALES.

In Conclusion

While the adoption of AI in sales operations presents challenges, the potential benefits for SMBs are substantial. With a strategic approach and the right support, businesses can harness AI to enhance productivity, improve customer engagement, and achieve sustainable growth.

Looking Ahead

AI is no longer optional in modern sales. As tools mature and costs drop, SMBs that delay adoption risk falling behind faster-moving competitors. But with the right approach, small teams can punch above their weight—driving better insights, faster cycles, and stronger relationships.

The future of sales is human-led, AI-augmented. SMBs who start building that future today will be tomorrow's market leaders.



HERE ARE SEVERAL RECOMENDED AI TOOLS

... but there are many other options on the market that could also be a good fit for your business.

SALES PRODUCTIVITY

- **Lindy.ai:** Automates CRM tasks, easing manual workload and supporting lead generation.
- **Bardeen.ai:** Automates tasks like list building and email deployment for strategic focus.
- **Zapier/ Make.com:** Connects various web applications to automate workflows. It's commonly used with automating tasks.
- **Salesforce(Einstein):** A powerhouse for sales analytics, lead scoring and actionable insights.

CUSTOMER ENGAGEMENT

- **Fireflies.ai:** Transcribes and analyzes sales calls for actionable insights.
- **Fathom.video:** Captures and highlights pivotal moments from meetings.
- **Granola.ai:** Enhances meeting notes with essential takeaways.
- **Otter.ai:** Offers real-time transcription and summaries.



MARKETING OPTIMIZATION

- **Knowledgenet.ai:** Automates LinkedIn connections and email creation.
- **Clay.ai:** Supports marketing strategies with research-driven insights.
- **Lemlist.com:** Specializes in email deliverability with personalized touches..
- **Humanlinker.com:** Delivers AI-driven personalization and prospecting profiling.
- **Pitch59.com:** Replaces business cards with video messages.
- **Salesreach.io:** Deliver personalized, multimedia-rich experiences to speed up deals and boost buyer engagement.
- **HeyGen.com:** Uses avatars for professional video content.
- **Rephrase.ai:** Employs AI avatars for impactful messaging.
- **Sendspark.com:** Enables personalized video outreach.

COMPETITOR INTELLIGENCE

- **BuzzSumo.com:** Tracks competitors.
- **Brand24.com:** Tracks social media sentiment to provide insights into public perception.
- **Similarweb.com:** Gives insights into web traffic and advertising trends to understand online presence.
- **Mentionlytics.com:** Offers influencer and sentiment analysis to identify key opinion leaders.
- **DigiMind.com:** Analyzes market trends for a comprehensive view of the market landscape.

COLLABORATION & TEAM SUPPORT

- **Meetrecord.com:** Provides coaching insights from sales calls for improved communication strategies.
- **Apollo.ai:** Combines call analytics with coaching tools for enhanced sales performance.
- **Sales loft.com:** Offers real-time buyer insights and conversion optimization for effective interactions.

CONVERSATIONAL AI

- **ChatGPT** – A conversational AI by OpenAI that generates human-like responses for writing, research, and problem-solving tasks.
- **Claude** – An AI assistant by Anthropic focused on safe, thoughtful dialogue and strong performance in long-form, structured content.
- **Perplexity** – An AI-powered search tool that delivers real-time, cited answers by combining conversational AI with live web data.



TIDEWATER SOLUTIONS GROUP

AT THE INTERSECTION OF STRATEGY AND EXECUTION

Tidewater Solutions Group, powered by Sales Xceleration, serves as both architect and builder—helping small and mid-sized businesses (SMBs) and manufacturing companies modernize their sales operations through the responsible and effective adoption of AI. As organizations face mounting pressure to do more with less, many leaders recognize AI's potential, but few have the internal structure, capacity, or guidance to implement it correctly. That's where Tidewater comes in.

Led by Shawn Dunahue, CSL a seasoned revenue operations strategist and Fractional VP of Sales with 30+ years of experience, Tidewater Solutions Group doesn't just offer high-level strategy or vendor lists. It rolls up its sleeves and works alongside your team to define the "why," map the "how," and stay in the trenches through the "what now" moments that define any meaningful transformation.

We've done it. We can help you do it too.

✉ **CONTACT: SHAWN DUNAHUE**

✉ **EMAIL:** SDUNAHUE@TIDEWATERSG.COM

☎ **PHONE:** 941-320-2131

