

The Generative Sales & Marketing Organization™

How Generative AI reinvents CRM, profits, costs, & revenue streams at B2B software companies

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1st Edition [V.1.0] Copyright 2/1/2024

Available in ChatGPT

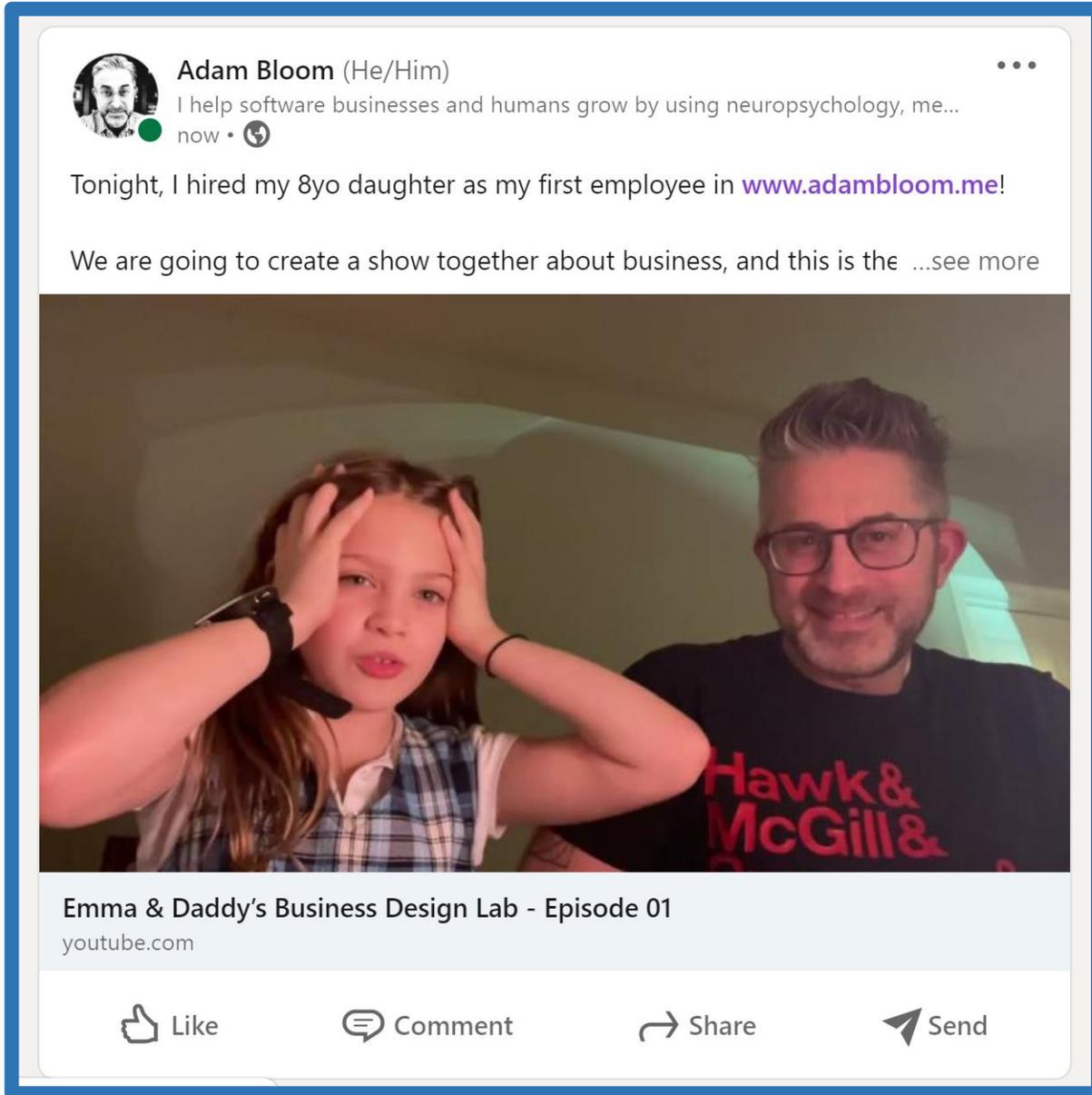
Open-Source

Illustrated by: hi@adambloom.me & DALL-E





Dedication



To Emma,

My amazing daughter. This book is dedicated to you!

May you always practice unconditional self-love & be a blessing in the lives of other humans.



Hello!

For me, the absolute #1 goal of a business is to serve others. This book has the same purpose.

When I first saw Generative AI take off in November 2022, I began to apply it to all aspects of software sales, marketing, product, & product led growth (PLG). This makes up 25+ years of my life—working in CRM, BI, cloud platforms, low code, & artificial intelligence sectors.

I tested every CRM & PLG use case I could think of—to prove the results of Gen AI. I created multiple pilots. And, I spent 2023 working on Gen AI solutions for ~20 startups. In addition, my sales & sales engineering role included “automating myself out of a job.” Funny enough, it wasn’t the first time I was hired to do that.

In January of 2024, I decided to write this book. It sets out to codify everything I have learned with Gen AI in B2B software, then share. Automating myself out of a job is an honest OMG moment.

I’m being real, but why give this away?

Today’s leaders are navigating the most disruptive technology in the history of mankind. Quality decisions here will make or break P&L statements, forecasted revenue, customer

acquisition cost, CLTV, & people—real humans.

My core premise—companies must do “CRM with Generative AI” extremely well, or they will begin to die. In fact, it is already happening—hence the red/blue pill theme of the book’s graphics, which OpenAI’s DALL-E helped with.

Gen AI won’t just impact profits, it will impact careers & jobs in a big way. Stress levels will get quite high—in terms of “surviving AI.” This is a personal concern of mine—a big boon to the psychology industry too. Every human now codes in English (or other non-code language). Your words will use AI to automate human tasks.

To this point, I am training my 10-year old daughter to use Gen AI because the world will be completely different as she goes off to college in 8 years, where Gen AI is disrupting education.

As I wrote, there were three questions I kept asking myself to ensure I hit the goal—as I can be quite self-critical.

One, “Would this help prepare my daughter to thrive in a different business world?” Two, “Will this drastically help B2B software leadership teams through the Generative AI Journey™?” Three, “Would I present these concepts at a shareholder, venture investor, board, or executive leadership team level?”

Preface



Ten days, 80+ pages, 30+ images, & 20+ diagrams later, I fully believe the answer is yes to all three. I hope this book is a blessing in your life & would love to hear from you at hi@adamboom.me.

With Immense Gratitude,

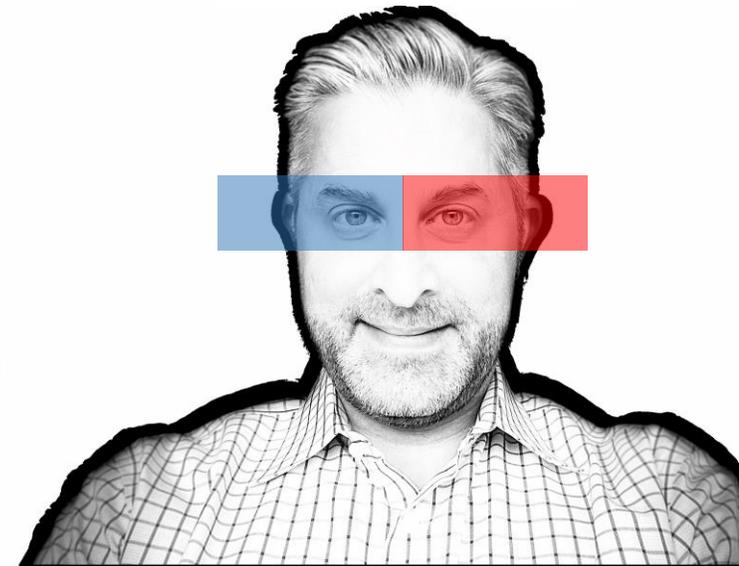




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Who is this book for? The ICP!

Key Takeaways from adambloom.me:

- The stakes are high for companies to do Gen AI well.
- Change is the fastest in tech history—people matter.
- B2B sales & marketing must change to compete & win.



The Problem

B2B software firms must maximize human productivity to beat the competition & outpace industry growth.

Since the 1990s, CRM automation tools have evolved, but Generative AI (Gen AI) will improve human productivity 100X+.

Firms must do CRM + GenAI well OR die—human capital management is key.

Target Departments

- **Sales**, e.g., BDRs, AEs, Ops, Enablement
- **Marketing**, e.g., CMO & VPs of lead gen, content, SEO, product, events, partners, PR, creative, branding, etc.
- **Product Led Growth (PLG)**
- **Customer Success & Support**

Target Companies

- Software, AI, API, & data businesses.
- Companies who build custom software—consultancies, engineering, digital agencies.
- Startups, VC Studios, venture Solutions, & Enterprise Innovation Labs—and advisories.
- Non-tech companies—of any size or industry—who compete heavily based on how they use software & data.

Roles

Any company leader who wants to turn CFO-approved budgets into 10X or 100X+ more results.

CEOs, CIOs, CTOs, CFOs, Chief Revenue Officers, CMOs, Chief Sales Officers, Product VPs, Chief CX Officers & any leader reporting into these roles.

Additional Info

- The transition is critical—see Netflix founder on [how they beat Blockbuster](#).
- Supporting information from [Google Trends comparing Gen AI vs Digital Transformation](#).
- Learn more from a myriad of strategic consulting views on the topic: [McKinsey](#), [HBR](#), [Wharton](#), [Gartner](#), [BCG](#), [Accenture](#), [Thoughtworks](#), [NVIDIA](#), [Forbes](#), & [Goldman Sachs](#).

Book Designed to Remix

Key Takeaways from adambloom.me:

- This panel is where I try to summarize each page for executives. Not easy!



How to use this book—designed for those who believe in open-source software & the sharing economy:

I designed the page layout with the intention to allow anyone to access it, add/edit their own pieces, then share or not. Just like open-source development.

- The aspect ratio of this “main” panel—it will allow you to easily crop, copy, & paste diagrams into your own presentation.
- As well, I made it easy to insert your own “Additional Info” (left box) or “Key Takeaways” (top box) on top of mine.
- Of course, you can always copy & paste text from PDF. My only hesitation, at the moment, is releasing the PPT—still thinking through how to GPT-ify it best.
- With Generative AI, I now view books as small language models (SLMs). We all should. They are knowledge bases that we will continually program. This book is designed with the idea that I can feed it into a Chat Bot, anyone can.



**open source
initiative®**

This “main” panel (with the thin, large red box line around it) will have the main information for each page.

- I provide very little citation on purpose—please research & form your own perspectives.
- I’d love attribution, but I mostly want to know you could use the book to help you in your job—to give you answers or at least guidance.
- Please post #TheGenOrg to support this free book.
- To be published @ github.com/adambloom.

Additional Info

This panel is where I add more detailed commentary than what is on the main panel, often from the first person.

This is for my homies!

Key Takeaways from adambloom.me:

- I love you for being on such a similar journey in life.
- This whole graduate degree in 1996 thing & ride the internet/software wave? It's been nuts!



Here is who I also wrote this for...

If you are my “software homie,” then we used to hang out or do business at a software company some time since 1996. LOL.

We didn't go to elementary, middle, high school, or college together, but we worked together. Sometimes a year, sometimes six years. We “did business” together.

You know, our lives crossed paths. We shared an experience. We talked about the world & life. We talked about customers & technology.

We worked on business ideas & goals—we conquered new territory. We worked hard to have a blast—alongside some heartaches. Sometimes we acted emotionally or foolish, sometimes we scored a touchdown. Maybe you were my CEO, manager, or peer—maybe I was your leader.

Let's be real. That was life. We did that.

My Gratitude & Acknowledgement

Now that I am down to the last few action items to complete this book, I have been wondering how to do an acknowledgement. It hit me just now—and this page is it.

My “homies” are people I worked with or admired from a distance. Every one of you had a big influence on my life. And, I am forever grateful. This book's core is based on your belief in me, even when I couldn't.

Big shout out!  AB

My Homie's Music Meta Data—how do we relate? @:)

1970s: Earth, Wind, & Fire, Fleetwood Mac, Stevie Wonder, Bill Joel

1980s: Bob Marley, Prince, Run DMC, Public Enemy, Duran Duran, OMD, Queen

1990s: Nirvana, Pearl Jam, Dre/Snoop, 70s Disco, Garth Brooks, BB King, Mozart

2000s: Coldplay, DJs/Mashups, Lady Gaga, KOL, 50 Cent, OutKast, Skrillex, John Coltrane

2010s: YouTube Playlists, Post Modern Juke Box, Tiny Desk Concerts, 80s Yacht Rock, Muse, Taylor Swift, Ariana Grande, Ed Sheeran, Bob Marley, Beethoven, Pentatonix, Zac Brown

2020s: Any global/historic/religious/wellness music, Melanie Martinez, Mike Love, J.Bieber



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Chapter 1

The Executive Summary

Sections

- Value Migration
- The Bottom Line
- Big Analogy
- Benefits & Business Case
- The White-Collar Evolution

In this chapter, I explain how Generative AI is forcing value to migrate out of every company's current business model. The most important topics make a big point about human productivity—including related cashflow/profit.

Then, the chapter outlines three approaches to a funding strategy & outlines the key benefits to support a business case.

adambloom.me



The Value is Migrating

Key Takeaways from adambloom.me:

- Generative AI presents a massive migration of value.
- Change impacts the business design, not just CX/UX/UI.
- Gen AI changes how the customer interacts with a firm.



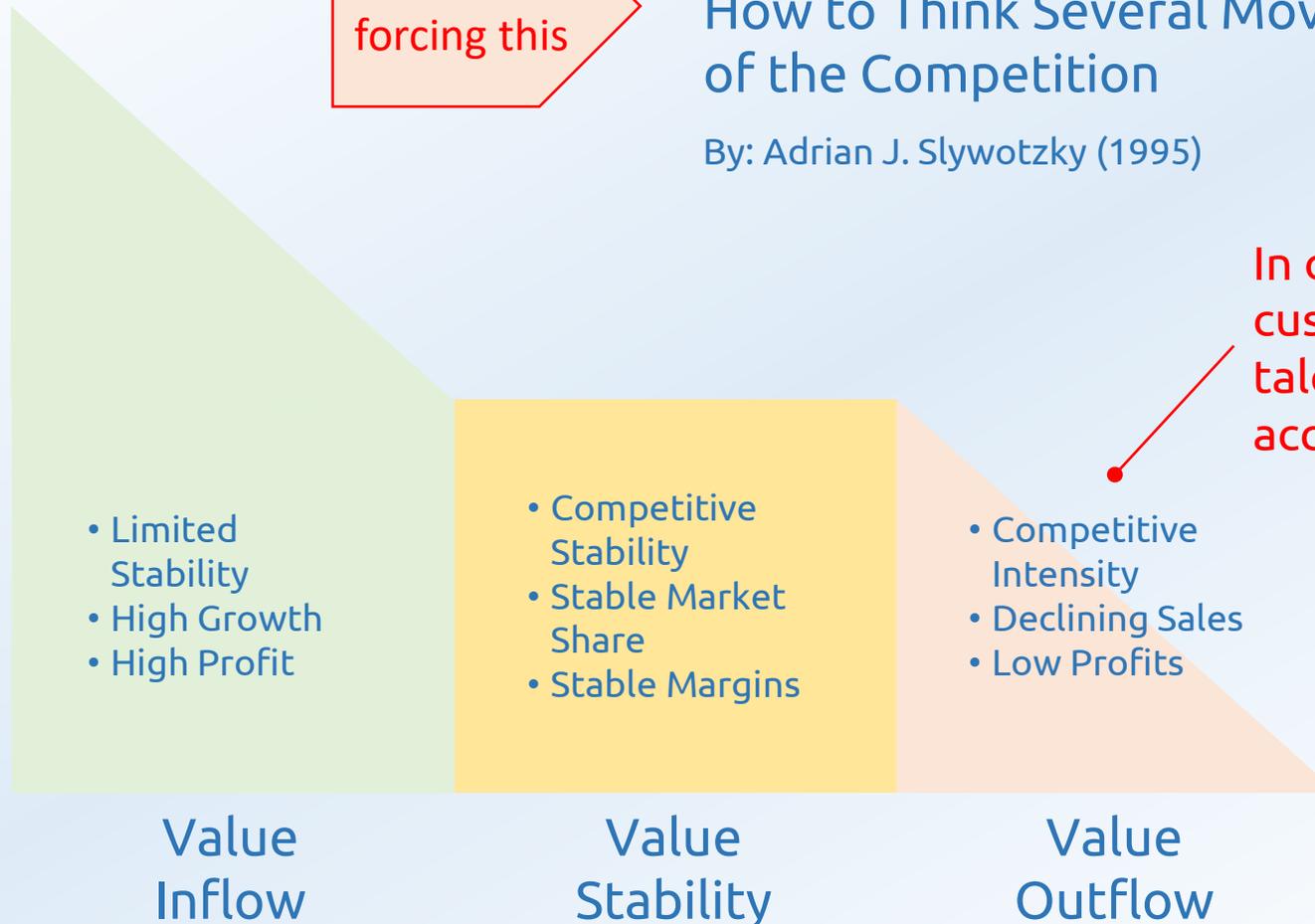
Gen AI is forcing this

Value Migration

How to Think Several Moves Ahead of the Competition

By: Adrian J. Slywotzky (1995)

Market Value & Company Revenue



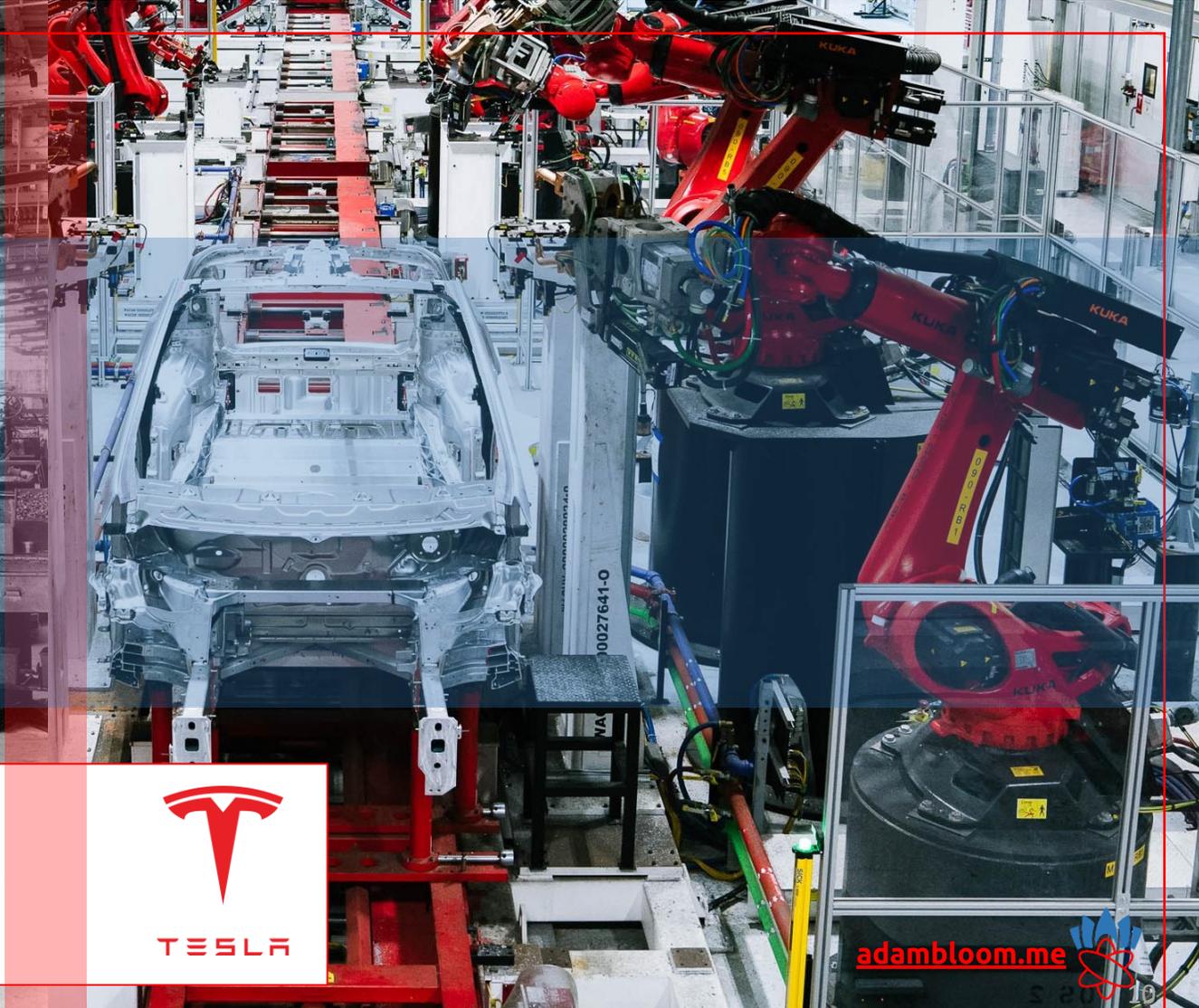
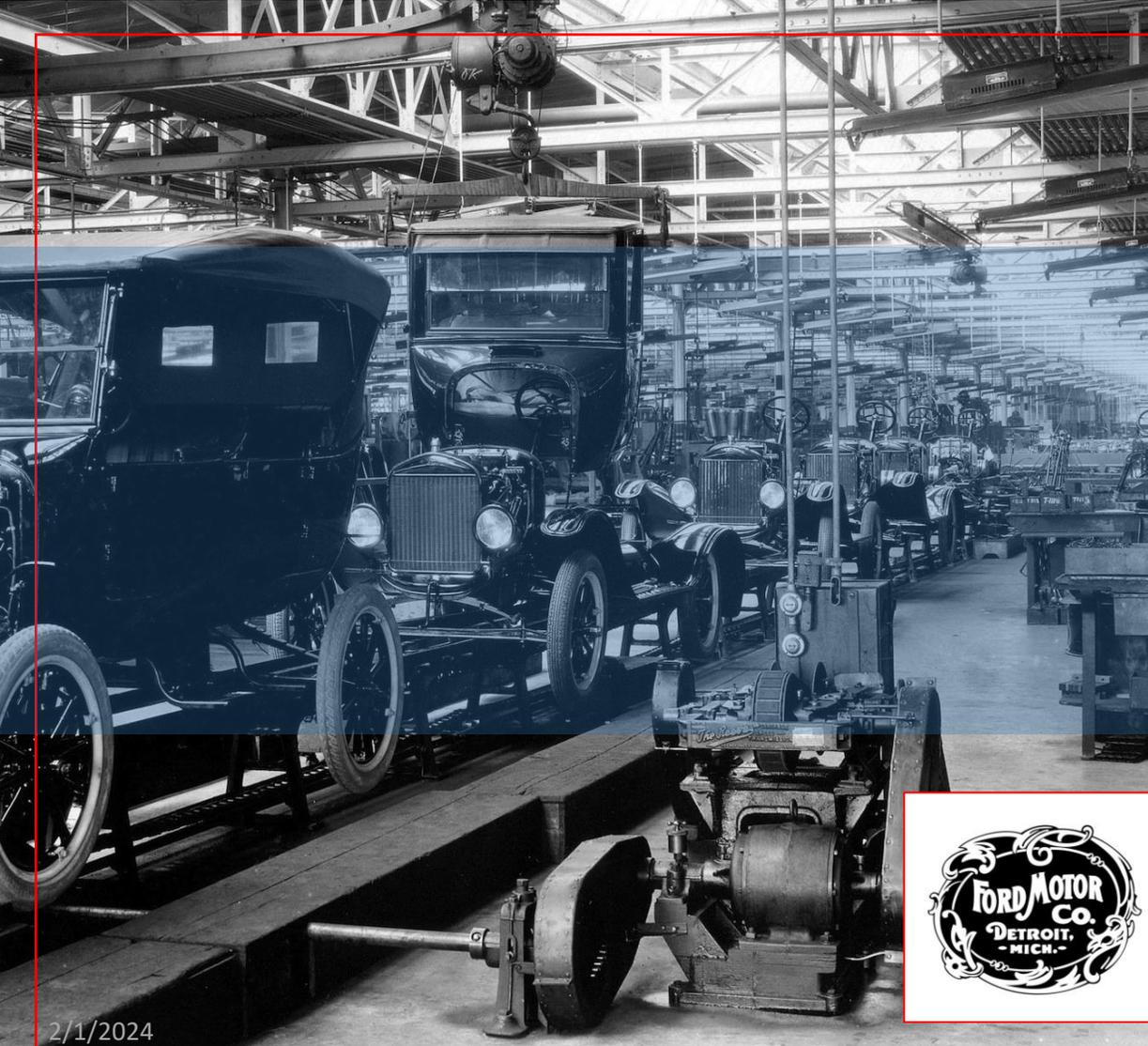
In outflow, customers & talent leave at an accelerated rate

Additional Info

- While dated, this framework has been popular in executive management circles since it was published. It is still applicable in the 2020s.
- The key point is that value migration occurs when customer needs shift, causing a movement of market value between companies, industries, or business models.
- Wikipedia [link](#).

The old process was 95% manual—still a revolution

The new process is 1000X+ more automated



The Bottom Line

Key Takeaways from adambloom.me:

- Many executives won't believe the potential ROI.
- Dismissiveness here presents a large cognitive bias—go with your team, look with your own eyes, & test reality.



For CEOs & CFOs

The bottom line is very simple:

- Count all the money you spend on sales & marketing in your B2B organization.
- Range find from 10% to 40% to 90% of cost savings. Use a three-year period with increasing, risk-aware investments over time that flatten in month 18.
- Assume you do not need to hire more staff to scale to any volume (except Gen AI staff).

Sound like malarkey?

I wasn't sure at first, but I've seen it firsthand.

What used to take me a month now takes me 1 hour. What used to take me an hour now takes me minutes. What used to take me minutes is something I don't have to do any more.

This is with very basic investments.

2/1/2024

For those Pitching the Case

Which business case do you want to make?

The Mega Business Case

- The detailed spreadsheet with money over time.
- The 25-50 slide presentation with timelines, teams, etc.
- The team signing up for measurable outcomes in detail.

The Pragmatic Business Case

- The basic spreadsheet with money over time.
- The 5-10 slide presentation.
- The team signing up for measurable benefits.

The Gut Feel with Proof

- No detailed spreadsheet.
- A 1-2 slide presentation.
- The team signing up because the leader's "gut" knows they are leaning in the right direction. They have seen it with their own eyes & have a compass but not a map.

Additional Info

The eye-opening "aha" factor is one of the main reasons I wrote this book.

Gen AI is hyped, & it is hard to believe in something so dramatic—until you experience it first hand.

The blue pill represents a blissful state of ignorance. The red pill is the willingness to learn the truth, even though it is difficult.

Is it worth taking a small dose of the red pill? You decide.

White Collar Evolution

Key Takeaways from adambloom.me:

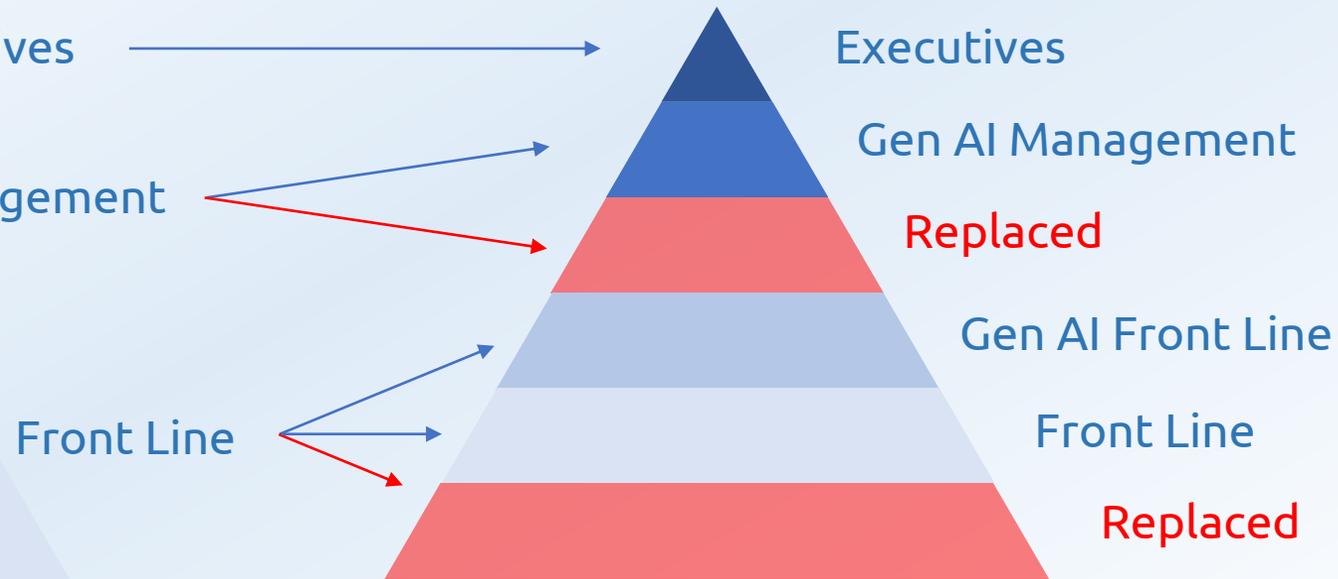
- There is a huge transition in the labor force.
- Those performing tasks, which Gen AI can do, will be replaced because they cost more than Gen AI.



White collar workers without Generative AI



White collar workers with Generative AI



Additional Info

The executive leadership teams will likely remain unchanged.

Middle managers will be enabled to lead & manage Gen AI initiatives.

Frontline workers will operate Gen AI to increase productivity.

Some frontline workers will still be required to support GenAI or non-GenAI tasks.

Others will be replaced.



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Chapter 2

How Kids use Gen AI in 2024

Sections

- 10-yr Old Use Cases
- How far can DALL-E go?

This chapter tells a story. While I won't reference my daughter past this chapter, teaching her Generative AI has been eye-opening. At 10 years old, she does the work of professional illustrators—learned in 2 minutes.

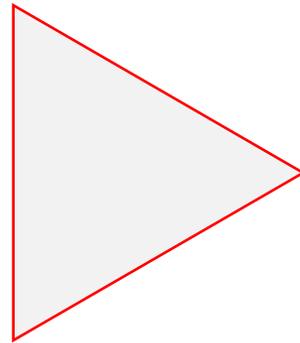
Imagine if your team could do that? They can.

She & I have explored Gen AI with interior design, fractions, video editing, songwriting, & more #headexplode. In part two, I explain how I used DALL-E to create all the illustrations for this book. In later chapters, I'll explain how to do it for all content across B2B customer interactions.

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My 10-year Old's Gen AI Journey



Completed in 6 minutes with 6 prompt inputs, & 1-2 minutes of training.



adambloom.me



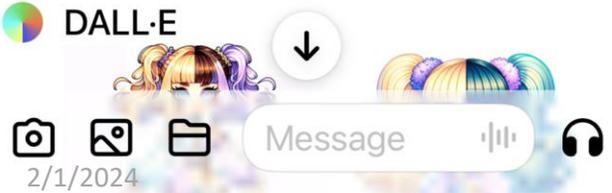
Output from Version 1





Here are the images based on your description. They feature a unique character in a detention-themed outfit with the specific details you mentioned. Feel free to let me know if there's anything else you'd like!

You like that but make the hair split in half with blonde and dark brown and put it in high pigtails with bangs



Output from Version 2



Output from Version 3, 4, & 5

You
also make the sleeves short
Message



You
make her have pants not leggings
make her have off the shoulder
short poofy sleeves that look like
clouds and make even more
re:



You
even more re: c and make her
Message



DALL·E > you'd like to change or add, just let me know!

Final Output (V.6)

You
keep the outfit purple blue and the hair fully half split between blonde and dark brown hair



DALL·E
Here are the updated images reflecting your latest specifications: the character now has fully split hair, half blonde and half dark brown, and the outfit is in purple-blue tones. If you have any further requests or adjustments, feel free to let me know!



University Professor Hat On

Key Takeaways from adambloom.me:

- This gives a fundamental example of shift in value.
- It is critical to understand the [sea change](#).
- Never wanted a professor hat, but dang. Crazy!



Comparing Gen AI graphics to text will help explain the power of Generative AI at an Ivy MBA level.

What if I told you that the differences between the prior inputs to Gen AI photos versus inputs to Gen AI text was incredibly similar?

The prior images were fine tuned over 6 iterations. What if I said that text—i.e. language, content, spoken/written words, verbs, nouns, letters, & any communications—can follow the same model as pictures? Text can get VERY specific in terms of Gen AI responses. Gen AI is better than humans in this manner—it can scale any media 100X+ at a low cost.

It humbles me to think, but I've been a Photoshop-er since college—version 2.5! For graphic design, you had to understand layers & filters. This is very similar to using PowerPoint “Arrange > Bring to Front” or PowerPoint “Picture Format > Color.” All heavy photo & social apps, like Apple Pictures & Instagram, allow anyone to use layers & filters.

Melanie, Orpheus, & “communications to an executive decision-maker” are all available via Generative AI.

Graphics VS Text

The ability to iterate & improve quality is how the value, user, process, architecture, & financial patterns show up—via layers & filters.

Photo Layers/Filters

1. Create Melanie Martinez
2. Include purple, blue pastel fuzzy leg warm...
3. Make the hair split in half with blonde & dark...
4. Make the sleeves short & off the shoulder...
5. Even more realistic...
6. Keep the outfit purple blue & hair fully split...



Text Layers/Filters

1. Create a profile for the CFO buyer.
2. Make it a job description with metrics.
3. Map our top customer results to their metrics.
4. Make a list comparing metrics to our features.
5. Try again—make features more detailed.
6. Write one email in 20 words for the CFO.

Additional Info

Many of us receive the Ivy League advertisements on LinkedIn for “executive education programs.”

Design thinking & Generative AI is a key thing they are promoting to drive their own revenue.

They know education is being reinvented as we speak.

Every book is now a small language model.

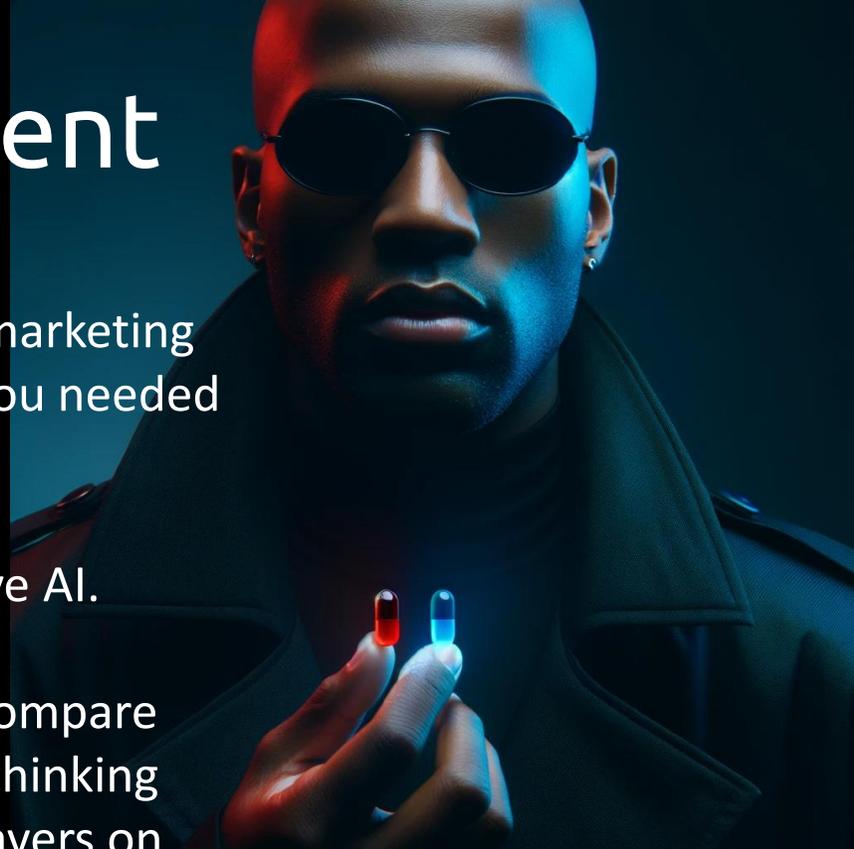
An Experiment

In the 1990s, a newer job requirement for sales & marketing teams was PowerPoint. You needed the skill to get a job.

As of 2024, it is Generative AI.

The next few pages will compare Gen AI through a design thinking exercise, unpacking the layers on the prior page & retargeting it towards writing for a CFO.

Let's see what Orpheus can do...





Gen AI Input Layer 1

Compare the below descriptions to the images to understand Gen AI patterns.

Photo Layers/Filters

1. Create Melanie Martinez
2. Include purple, blue pastel fuzzy leg warm...
3. Make the hair split in half with blonde & dark...
4. Make the sleeves short & off the shoulder...
5. Even more realistic...
6. Keep the outfit purple blue & hair fully split...

Text Layers/Filters

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4. Make a list comparing metrics to our features.
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Gen AI Input Layer 2

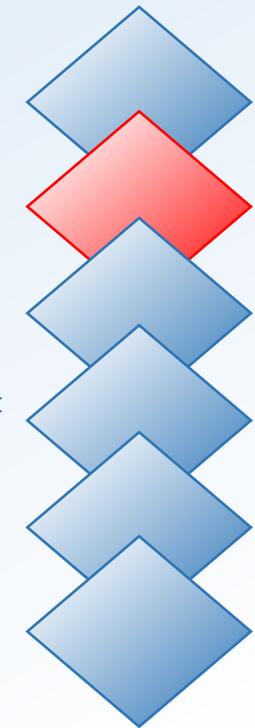
Compare the below descriptions to the images to understand Gen AI patterns.

Photo Layers/Filters

1. Create Melanie Martinez
2. Include purple, blue pastel fuzzy leg warm...
3. Make the hair split in half with blonde & dark...
4. Make the sleeves short & off the shoulder...
5. Even more realistic...
6. Keep the outfit purple blue & hair fully split...

Text Layers/Filters

1. Create a profile for the CFO buyer.
2. Make it a job description with metrics.
3. Map our top customer results to their metrics.
4. Make a list comparing metrics to our features.
5. Try again—make features more detailed.
6. Write one email in 20 words for the CFO.





Gen AI Input Layer 3

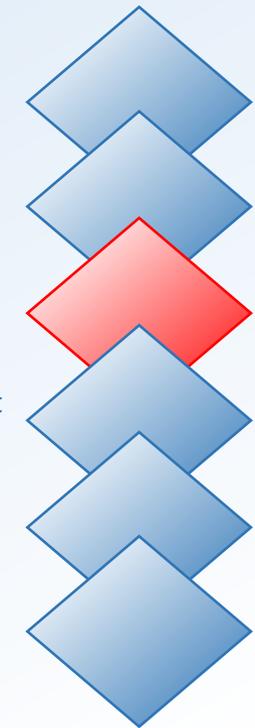
Compare the below descriptions to the images to understand Gen AI patterns.

Photo Layers/Filters

1. Create Melanie Martinez
2. Include purple, blue pastel fuzzy leg warm...
3. Make the hair split in half with blonde & dark...
4. Make the sleeves short & off the shoulder...
5. Even more realistic...
6. Keep the outfit purple blue & hair fully split...

Text Layers/Filters

1. Create a profile for the CFO buyer.
2. Make it a job description with metrics.
3. Map our top customer results to their metrics.
4. Make a list comparing metrics to our features.
5. Try again—make features more detailed.
6. Write one email in 20 words for the CFO.





Gen AI Input Layer 4

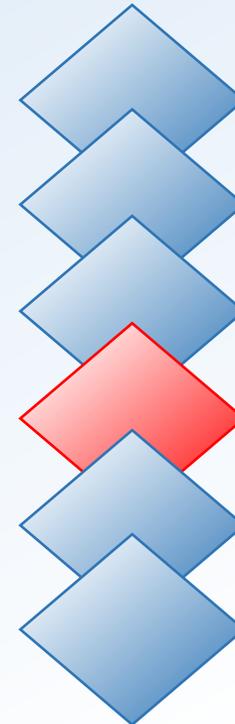
Compare the below descriptions to the images to understand Gen AI patterns.

Photo Layers/Filters

1. Create Melanie Martinez
2. Include purple, blue pastel fuzzy leg warm...
3. Make the hair split in half with blonde & dark...
4. Make the sleeves short & off the shoulder...
5. Even more realistic...
6. Keep the outfit purple blue & hair fully split...

Text Layers/Filters

1. Create a profile for the CFO buyer.
2. Make it a job description with metrics.
3. Map our top customer results to their metrics.
4. Make a list comparing metrics to our features.
5. Try again—make features more detailed.
6. Write one email in 20 words for the CFO.





Gen AI Input Layer 5

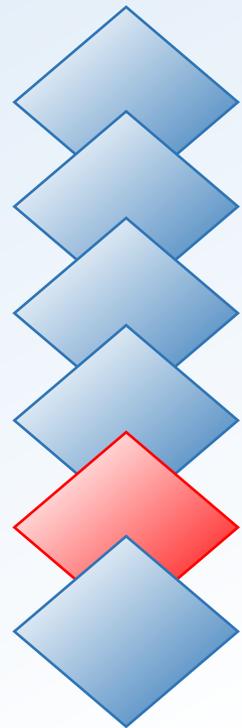
Compare the below descriptions to the images to understand Gen AI patterns.

Photo Layers/Filters

1. Create Melanie Martinez
2. Include purple, blue pastel fuzzy leg warm...
3. Make the hair split in half with blonde & dark...
4. Make the sleeves short & off the shoulder...
5. Even more realistic...
6. Keep the outfit purple blue & hair fully split...

Text Layers/Filters

1. Create a profile for the CFO buyer.
2. Make it a job description with metrics.
3. Map our top customer results to their metrics.
4. Make a list comparing metrics to our features.
5. Try again—make features more detailed.
6. Write one email in 20 words for the CFO.





Gen AI Input Layer 6

Compare the below descriptions to the images to understand Gen AI patterns.

Photo Layers/Filters

1. Create Melanie Martinez
2. Include purple, blue pastel fuzzy leg warm...
3. Make the hair split in half with blonde & dark...
4. Make the sleeves short & off the shoulder...
5. Even more realistic...
6. Keep the outfit purple blue & hair fully split...

Text Layers/Filters

1. Create a profile for the CFO buyer.
2. Make it a job description with metrics.
3. Map our top customer results to their metrics.
4. Make a list comparing metrics to our features.
5. Try again—make features more detailed.
6. Write one email in 20 words for the CFO.





The Generative Sales & Marketing Organization™

Chapter 3

How Gen AI Works

Sections

- Gen AI Tech Summary
- The Tech Magic of GPT
- Gen AI in Sales & Marketing
- Example Gen AI Use Cases

This chapter lays a foundation for how Generative AI works.

Then shows how sales & marketing “seed data” can be loaded into Gen AI to produce everything sales & marketing normally produces—any customer questions/answers or marketing copy.

Then, it goes a bit deeper into the technology & provides 30 example use cases for Gen AI.

adambloom.me



Gen AI – Tech Summary

Key Takeaways from adambloom.me:

- The process looks simple in a UI.
- Yet, it is some of the most sophisticated technology on Earth. See Wikipedia [article for GPT](#) for more details.



Users put data in.
Users get data out.

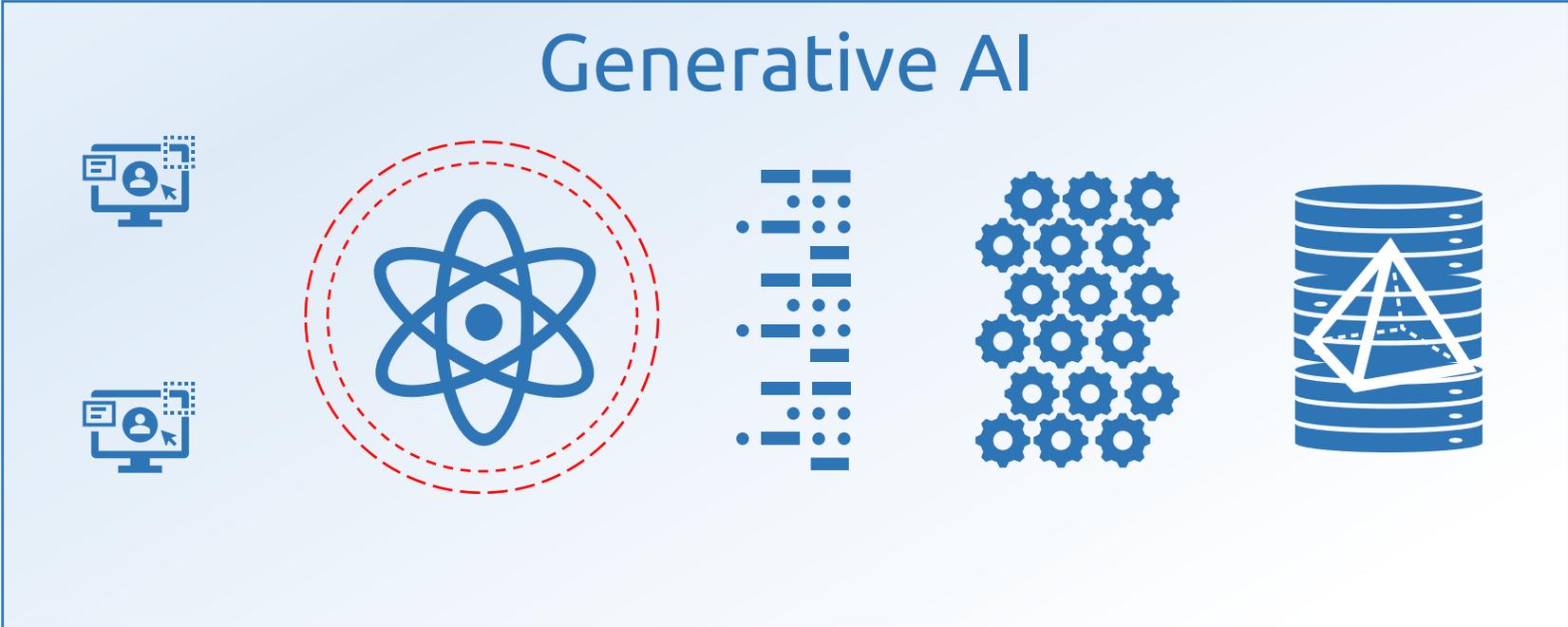
Captures & computes input via UI, then produces output via UI.
Runs specialized logic, flows, math, data queries, & more—on a vector database with pre-trained data.



Employee



Customer



Gen AI for Sales & Marketing

Key Takeaways from adambloom.me:

- Sales & marketing teams can use existing content to seed Gen AI with very domain-specific data.
- The output is profound & can be produced in minutes.



Input: "Seed" Content Data Load

Quality Input is Critical

Example Sales & Marketing Seed Inputs

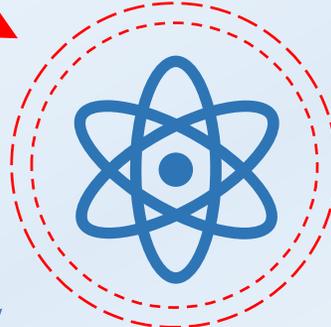
- Web pages
- Case studies
- White papers
- Video transcripts (YouTube, webinars, etc.)
- Call transcripts (sales pitches & notes)
- Sales emails &/or marketing email blasts
- Proposals & solution designs

Customer Requests

Sales Requests

Marketing Requests

Gen AI



LLM: Large Volume of foundational text to chat with—this is part of the "magic"

Output: Automatically Generated Answers

Customers

- Product info
- Business case info
- Technology info
- How to info
- Process info

Sales

- Prospect info
- Email copy
- Slide info
- Deal summaries
- Proposal writing
- Training

Marketing

- Digital Ads
- Events & PR
- Social Media
- SEO, web pages
- Emails
- Case studies

Other

Can output in ANY style/format, like songs, poetry, in the style of Yoda, or for a CFO vs. CIO vs. CMO.

The Tech Magic of GPT

Key Takeaways from adambloom.me:

- Gen AI uses math, text (e.g. the English Wikipedia & unpublished books) with a vector database to generate novel output. Data volume is a key to results' quality.

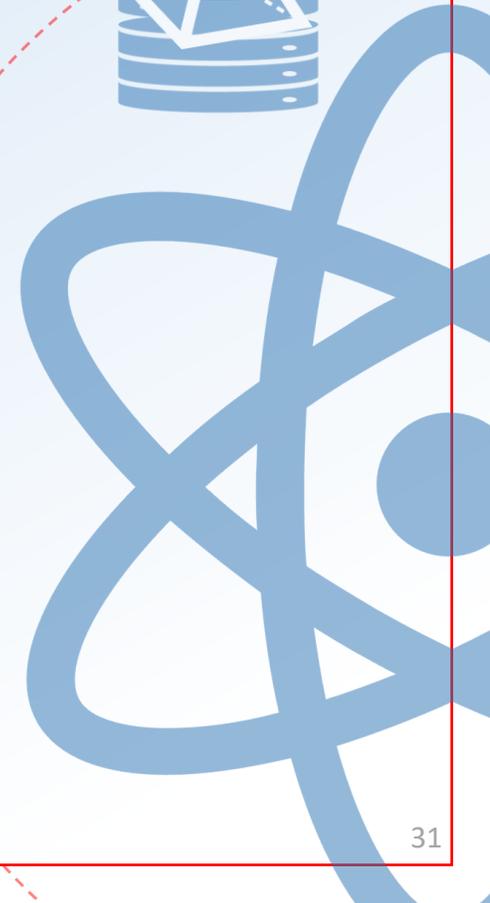
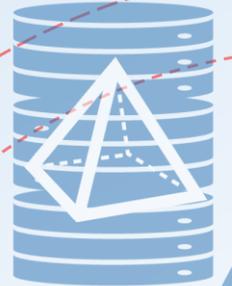


Generative AI is also called GPT & related to LLMs (data/math stuff)

- **GPT** stands for generative pre-trained transformer.
- **Generative** means it can generate novel human-like content.
- **Pre-trained** means the AI uses large data sets of unlabeled text (i.e., uncategorized, unclassified, or without metadata). The volume & quality impact the results drastically.
- **Transformer** is a software architecture for deep learning (i.e., machine learning).
- **LLMs** are large language models, related to pre-trained data, often interchangeable words.

The volume of data matters

- Foundational models act as input to teach the GPT—this is a very broad scale of data.
- Parameters measure volume & represent the math behind words, phrases, & sentences.
 - GP1-1 was trained with 117 million parameters (i.e., words & word parts as math).
 - GPT-3 was trained with 175 billion parameters.
 - GPT-4 is rumored to have used 1.7 trillion parameters (the current OpenAI version).
- Small language models can provide more specific, higher quality responses to requests.
- The magic also is related to data in numerical format, processing words 1000X faster.



Example Gen AI Use Cases

Key Takeaways from adambloom.me:

- Generative AI broadly & deeply enables innovation.
- There is a reason it became the top area of VC investment in 2023—with a massive growth percentage.



1. Text generation & question response
2. Image generation
3. Audio & video generation
4. Creative writing & sales training
5. Recommendations & personalization
6. Tutoring & education
7. Mental & traditional healthcare
8. Virtual (personal) assistants (chat bots)
9. Conversational non-player characters (gaming)
10. Simulated conversations
11. Customer support
12. Language translation & practice
13. Strategic research & knowledge discovery
14. Evaluating pros, cons, & alternation options
15. 3D model generation
16. Code, UI, & database generation/documentation
17. Code analysis, debugging, & refactoring
18. Code completion
19. Language translation, learning, & practice
20. Image classification, identification
21. Transcription, text-to-speech, speech-to-speech
22. Sentiment analysis
23. Generating jokes, music, poetry, or stories
24. Scraping & cleaning data
25. Grammar/writing checks, grading, & scoring
26. Summarizing, outlining, & organization
27. Keyword research & SEO optimization
28. Creating questionnaires & surveys
29. Mimicry of historical or known personalities
30. Industry-related contexts, e.g., pharma & legal

Additional Info

Generative AI supports a massive set of new use cases. Previously, these were very difficult & expensive to do.

These use cases can be mixed with different UI controls, different prompt designs, different logic, & different foundational data.

In addition, Gen AI has “memory,” which means it can remember prior conversations.



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Chapter 4

Author's Gen AI Apps

Sections

- Detailed List of Apps & Output Generated
- Expanded List of App Details
- List of 20 Startups where Generative AI applies

This chapter starts with a list of apps I built for sales & marketing, then tested to prove results.

The chapter explains what each was, the input (seed content), the output generated, & which GPT was used.

It ends with a list of 20 startups' core functionality, where Gen AI clearly added value.

adambloom.me



Author's B2B GPT Apps

Key Takeaways from adambloom.me:

- The testing approach was robust & comprehensive.
- Across multiple hands-on examples, Open AI's ChatGPT could improve one human's productivity 100X.



#	Data Load (Seed Content)	Output Generated
1	Sales Script	Any type of sales/marketing copy—for any channel.
2	White Paper	Any tech explanation to solution architects/coders—for any channel.
3	Web Pages	Any derivative marketing or sales content from 1 or many web pages.
4	20+ Gen AI Startups	Gen AI used to define ICPs, market analysis, UI design, functionality ideas, & much more.
5	Book	Rewritten summaries as songs, poems, styles of eras or famous personalities—endless contexts.

Additional Info

1. This was a detailed, 1-hour sales script for a complex software product. Written in days.
2. This was a 44-page white paper. Written in weeks.
3. Several hundred pages. Written over months.
4. Gen AI supported strategic work & messaging.
5. This was organized like a book & largely in a story format.

Author's B2B GPT App Details

Key Takeaways from adambloom.me:

- Across multiple hands-on examples, Open AI's ChatGPT could improve one human's productivity 100X.
- Apps proved robust content creation & inquiry/answer.



#	Data Load (Seed Content)	Type	GPT	GPT + UI + Code
1	Sales Script	Doc	3.5	3.5 + Old UI + Yes
2	White Paper	PDF	3.5	3.5 + Old UI + Yes
3	Web Pages	HTML /URLs	3.5	3.5 + Old UI + Yes
4	20+ Gen AI Startups	Biz Plan	3.5	3.5 + Old UI + No
5	Book	PDF	4.0	4.0 + New UI + No

Additional Info

1. Example seed content. 3K quality words/pics
2. Example seed content. 11K quality words/pics
3. Example seed content. Endless web pages & pics
4. "Manual" use of ChatGPT to create ventures & apps.
5. Recently written seed content. 8K words in 24 hours

20 Gen AI Startups

Key Takeaways from adambloom.me:

- Much like search functionality has become ubiquitous, Generative AI will pervade virtually all applications.
- It certainly applied to solutions for 20 different startups.



1. Customer & partner portals
2. 3D metaverse automation
3. Middleware for Generative AI
4. Personal trust management
5. Social media
6. AI-driven video email
7. Call center workforce automation
8. Art gallery e-commerce
9. Home organization
10. Healthcare billing
11. Psychology evaluations
12. Digital capture & search
13. Home delivery
14. Cancer care
15. Real estate construction
16. Recruiting
17. Programmatic advertising
18. Community investment
19. Startup incubator
20. Real estate listings & networking

Additional Info

In 2023, part of my role was solution architecture. Our product platform to help developers automate application development.

There were ~100 startups who engaged me.

Weather Gen AI was an opportunity for them or not, I always explored these contexts—where Generative AI could provide novel solutions. Each had a clear value prop.



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Chapter 5

Org & Budget Changes

Sections

- Changes Across Departments & Convergence
- Changes in Budgets to Consider
- How Gen AI Investments Force Leaders to Think Different
- Steps to Start

This chapter is oriented for the CEO, CRO, CMO, CFO, & CHRO—to act as a guide for talking points.

Each section presents models & mindsets to consider & discuss. It is highly applicable to money but underlines the changes in human capital.

adambloom.me



Changes Across Departments

Key Takeaways from adambloom.me:

- The evolution of pilots should remain a priority.
- The ultimate goal should be integrated efforts.
- Without integration, financial waste is a higher risk.

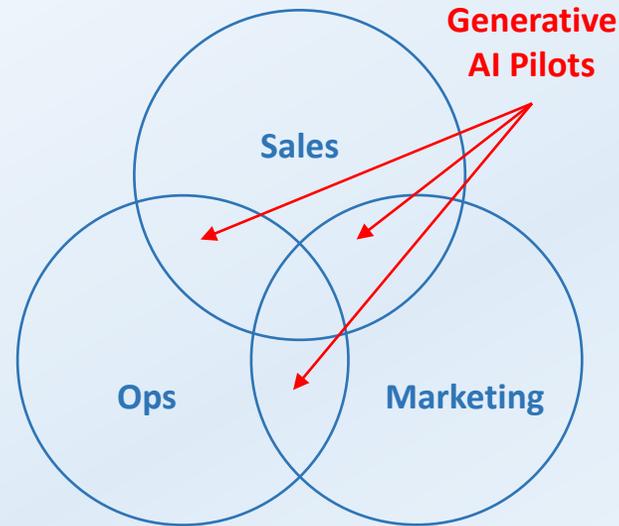


In today's B2B world, many companies are loosely integrated.



For most B2B software companies, sales & sales ops are largely separate from marketing, even if on the same tech stack. Sales often has more resources in ops, which is considered a priority because of revenue. Finance has to fit in here.

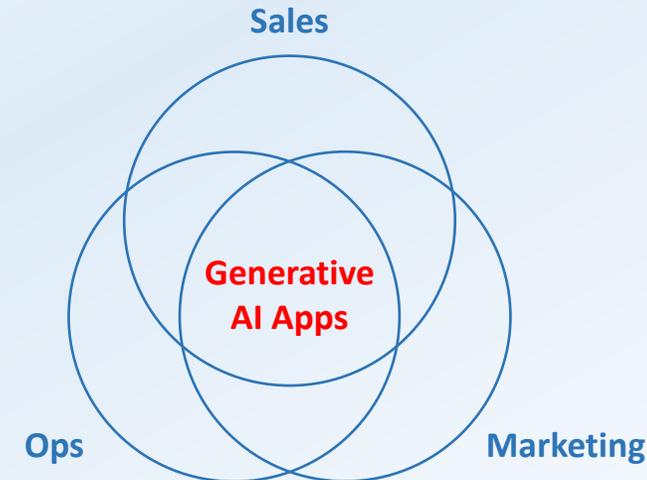
Some are better integrated.



As companies mature, the ability for the teams to share process, data, & reports are more integrated, producing greater productivity & better insights. Many teams are piloting GenAI separately.

Again, finance has to fit in.

Generative AI will force further integration.



Generative AI will add another forcing function for teams to coordinate & integrate. Finance's view matters.

If not, sales & marketing will be working on their own separate Generative AI stacks—including data, tools, & processes.

Additional Info

Why does this integration matter?

The two main use cases for Generative AI are A) creating content to be sent to customers, & B) asking questions & getting answers.

The main difference is—who makes requests of GenAI—employees/internal or customers/external?

The source GenAI data should be the same.

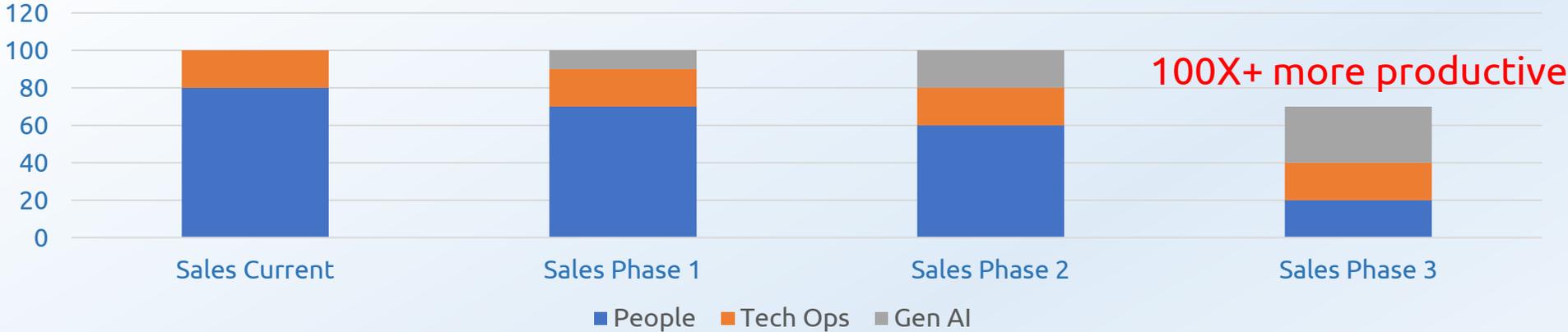
Changes In Budgets

Key Takeaways from adambloom.me:

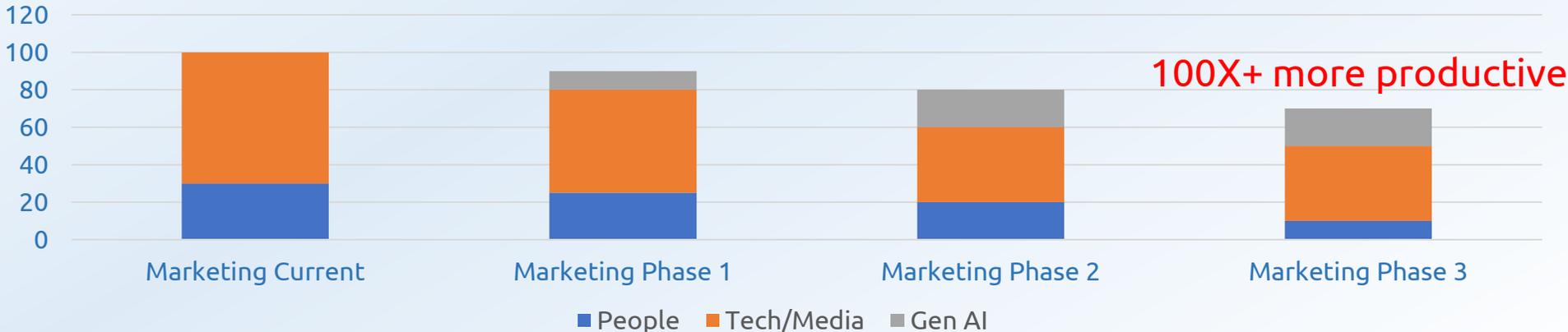


- Sales costs shift then lower, productivity is 100X more
- Marketing costs lower, productivity is 100X more.
- Finance will find this compelling as an ROI, not as a cost.

Sales Budget – Shown as a % of Budget



Marketing Budget – Shown as a % of Budget



Additional Info

Sales slowly lowers the amount of People without impact to revenue. The Tech Ops budget largely remains the same. Gen AI will ramp up & eventually lower sales costs.

Marketing slowly lowers the amount of People without impact to revenue. Tech/Media is variable cost, where content production costs less. GenAI will ramp up & eventually lower the cost of marketing.

Gen AI Investments

Key Takeaways from adambloom.me:

- This technology is different than any other in history.
- Get started with internal pilots today.



CEO, CRO, CMO, CFO Mindset: Crawl, Walk, & Run Differently

- This is not like any other B2B CRM software investment you've made before, unless you have done so with artificial intelligence investments.
- Gen AI is more like a media investment, which is considered a product. Media investments generate revenue for years, e.g. songs, books, films, top-ranked SEO, YouTube videos, & search engines.
- Treating Gen AI the same as a CRM software investment—like a quarterly cost center—will eventually lead to a massive competitive disadvantage. We are talking about white collar robots here.
- Gen AI may start off looking like another operational CRM system, but it won't end up there.

Crawling with Sales

- Step 1: Take your best sales script—shoot for 3000 written words. Load it into ChatGPT 4.0—it takes a few minutes to do so. Have the team ask it 50 typical sales question. Discuss the outcomes.
- Step 2: Ask the team to sign up for ChatGPT & try to use it for everything they can. Share the results in an ongoing internal meeting & discuss.
- Step 3: Write down your biggest fears, risks, & concerns with this technology. Meet & discuss the potential positive & negative impact.

Crawling with Marketing

- Step 1: Again, take the best sales script & load it into ChatGPT 4.0. In this case, ask it to create 30 different types of marketing output—press releases, podcast scripts, etc. The more detail you provide, the better it will do. Discuss outcomes.
- Step 2: Again, ask the team to sign up & use it for everything they can. Again, share the results in an ongoing internal meeting & discuss.
- Step 3: Write down your biggest fears, risks, & concerns with this technology. Meet & discuss the potential positive & negative impact.

Additional Info

Only you know the current state of your company's tech stack, the approach to decision-making, the type of business case you need, or the exact path to navigate internally.

The suggested crawl stages explain a smart approach to piloting solutions—ones that make the case for investment in sales & marketing. The experience of it will shape the vision & support your business case.



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Chapter 6

Changes to Sales & Marketing

Sections

- Evolution of Sales & Marketing Content
- How content fits in the future customer experience
- PLG & Gen AI
- Process Change & Gen AI
- Gen AI & Go To Market:
 - Messaging
 - New Product Launches
 - Web-Based Selling

This section takes a deep dive into major process changes on the road to becoming a generative organization.

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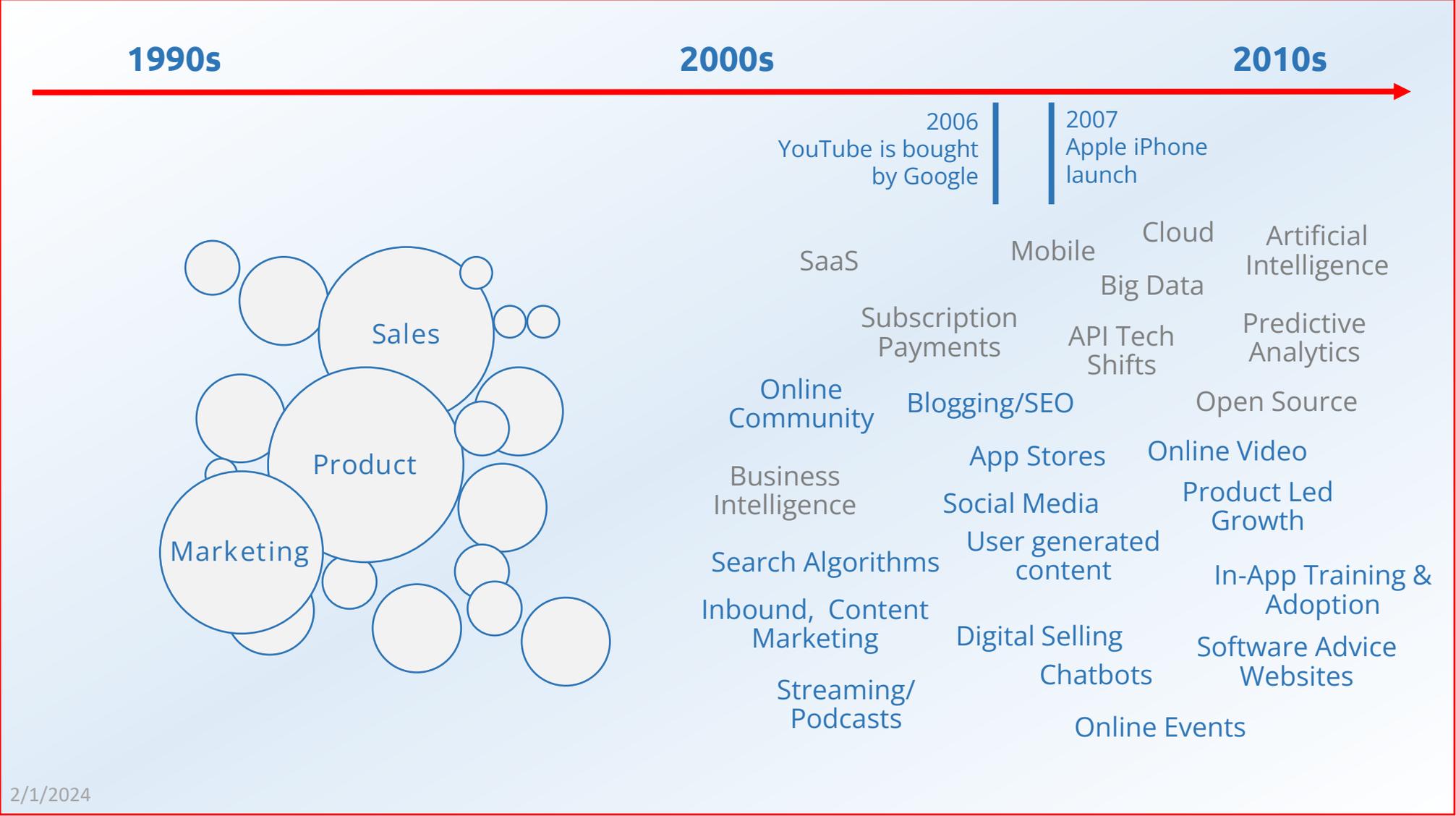
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CX & Media/Content Evolution

Key Takeaways from adambloom.me:



- The world has changed dramatically in two decades.
- Business will change more in the next 5 years than it did in the past 20.



Additional Info

In the 1990s & early 2000s, the media (content) produced was less organized but also far less complex.

As the 2000s unfolded into the 2010s,

To solve the complexity problem, we used search. Not just one search engine, but many.

Blue shows categories with direct impact to sales & marketing.

Products, Humans, & Media

Key Takeaways from adambloom.me:



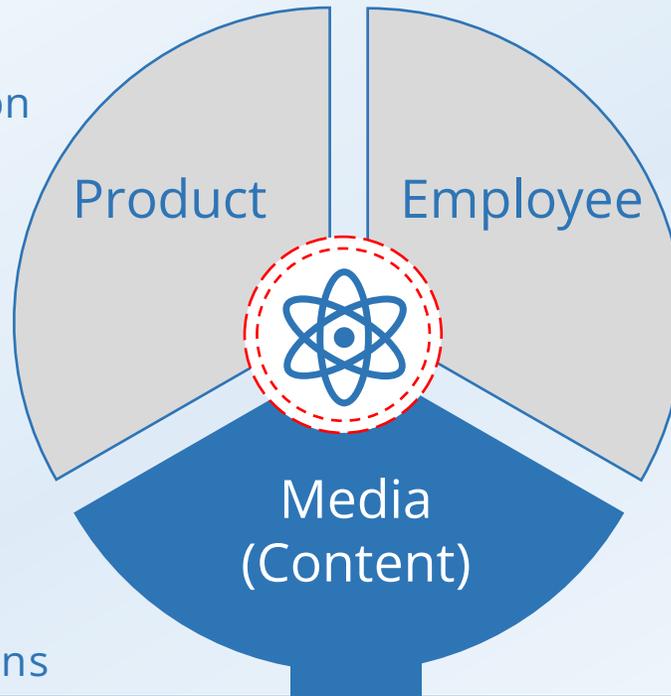
- Every department produces, uses, & promotes media/content. Teams continue to integrate more.
- The volume of media takes an amount of effort.

2020s & 2030s

The Customer Experience now has 3 main parts—all are moving toward Gen AI

Product Interaction

- UI, Logic, Data
- In-App Media/Content
- Product Training
- Product Led Growth
- Ecosystem/Stores
- Upgrade/Upsell
- Documentation



Human Interaction

- Marketing
- Advisory Services
- Sales
- Solution Architecture
- Implementation
- Support
- Success
- Account Support

Sales & Marketing Interactions

Sales Training/Tools	Success Tools	Web Pages, Copy, White Papers,	Blogs & Articles	Onboarding Info	Online Video
Community	Guided How To	Events, & Shows	Emails/Ads	UGC Chat Bots	Stream/Podcast
KB Articles	Best Practices		Tech Training	Social Media	Presentations

Additional Info

Product interactions are often owned by the product management team with input from marketing.

Media covers content-heavy items. These are usually owned by sales & marketing with input from product teams.

Human interaction includes the experiences between customer & employee are the primary method of exchanging information.

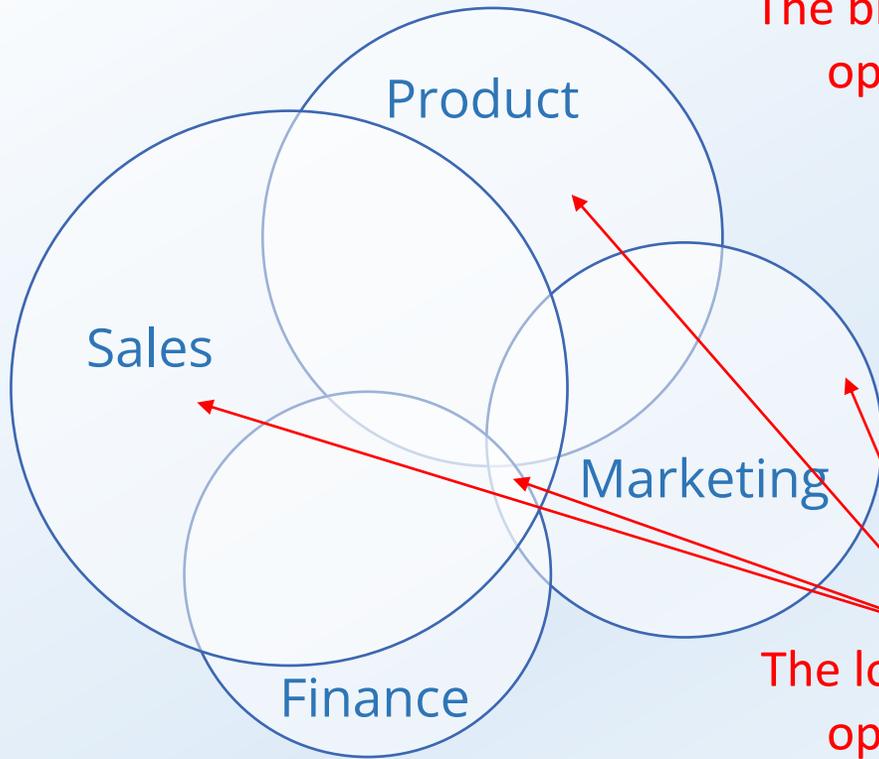
Product Led Growth (PLG)

Key Takeaways from adambloom.me:



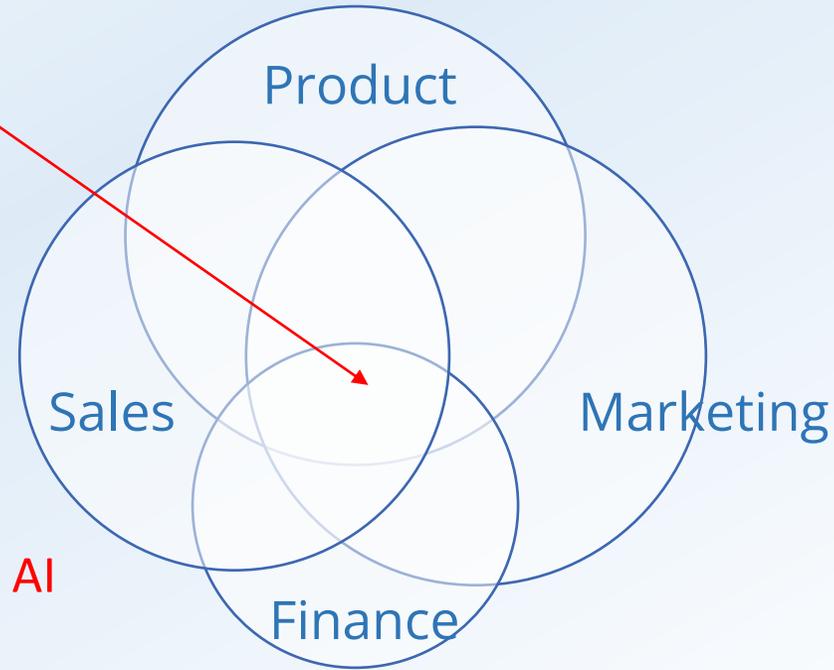
- Companies have seen the financial advantages, which the PLG business model offers.
- Gen AI will disrupt this model again, call it "PLG + GenAI."

B2B without PLG



Characterized by more of a sales led organization, which is very expensive.

B2B with PLG



Characterized by automating human interactions with product & media.

The biggest Gen AI opportunity

The lowest Gen AI opportunity

Additional Info

Particularly in the SaaS business model, PLG has emerged as a financially superior way to grow revenue. It could be called self-serve purchase.

In PLG, product-thinking leads CX/UX/UI. For example, a home page is replaced by product as a free trial. Onboarding is data & app driven. Metrics play a key role to inform finance, more like a complex e-commerce site.

Processes & Resources

Key Takeaways from adambloom.me:

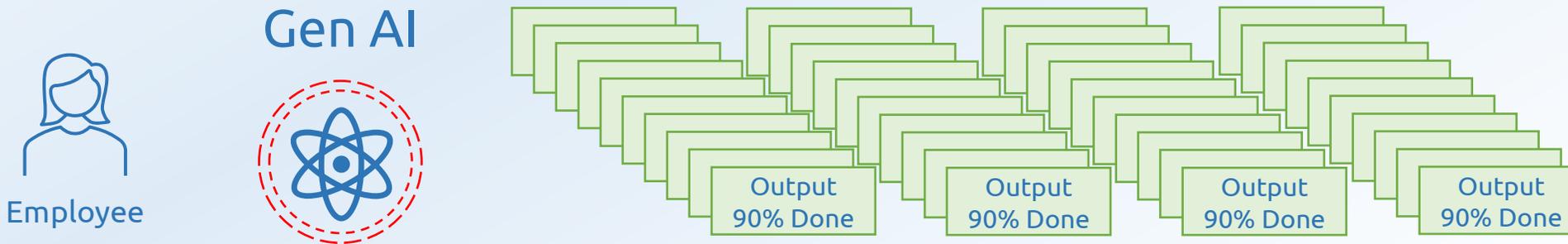
- The sales & marketing departments must change.
- The productivity factors are too big to ignore.
- Slow movers will face a competitive disadvantage.



Old Process – 10 people for 10 units output in 10 units of time



New Process – 1 person for 100+ units output in 0.01 units of time



Additional Info

With the old way, output is highly manual, with many iterations, many internal emails, many mistakes, etc. This makes the old way very expensive.

With the new way, output is highly automated. With far fewer iterations, far fewer internal emails, far fewer mistakes, etc.

This makes the new way much less expensive.

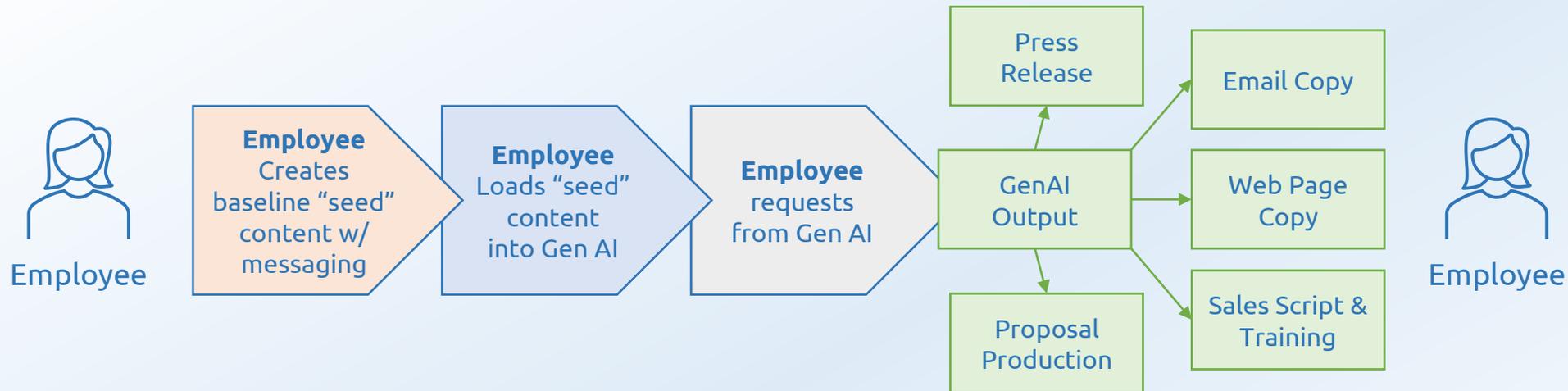
Sales & Marketing w/Gen AI

Key Takeaways from adambloom.me:

- With GenAI, customer inquiries & content creation will impact customer acquisition cost (CAC) at a 10-100-1000X scale.



Marketing Content Generation (internal, employee use cases)



Sales Question & Answering (external, customer use cases)



Additional Info

There is a tremendous overlap in the words being written by both departments.

Gen AI makes this a "knowledge engineering" exercise instead of a manual, one-off task.

When a Gen AI chat bot can give consistently high-quality answers, the business model changes in a financially disruptive way.

Using Gen AI for Messaging

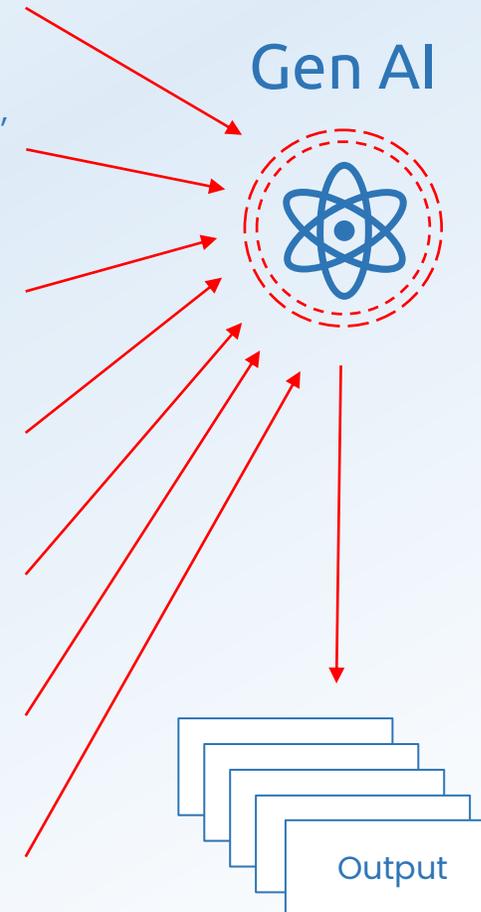
Key Takeaways from adambloom.me:



- Many CEOs under-value the communications part of taking a product to market.
- Financially, this failure is as expensive as it gets.

Key Inputs for Strategic, Go To Market Messaging & the Gen AI Impact

Buyer/User	Gen AI can be used to quickly capture in-depth profiles, including metrics & job descriptions of the target buyer or user.
Market Analysis	Gen AI can also be used to quickly capture market categories, summary of analyst or pundit commentary, trends, & emerging research.
Competitive Analysis	Competitive analysis comes in many formats: sales win/loss, website keywords, & product comparison. If content exists, Gen AI can summarize, compare, & contrast quite well.
Sales/Customers	If there are sales call transcriptions, one-on-one emails, customer case studies, & similar information, Gen AI can summarize, outline, combine, & much more.
Current State	If fed into Gen AI, it can summarize, outline, & even perform gap analysis of what content has dated messaging.
Product Capabilities & Roadmap	When use cases, stories, product documentation, & similar data is fed into Gen AI, it can create a Chat Bot for Q&A.
Corporate Strategy	Corporate strategy is likely something that won't be shared with Gen AI because, no one wants their competitors to know.



Additional Info

In my experience working with 3 unicorns, what separates the winners is two-fold: a) a great product that solves a high-priority problem & b) a more effective way to communicate value.

Superior communications can overcome a weaker product.

Gen AI accelerates GTM motions & product marketing effectiveness. What used to take me a week now 2 hours.

Gen AI, Messaging, & SLMs

Key Takeaways from adambloom.me:

- Messaging plays a large role in quality output.
- The scale is not an issue. The cost is not an issue.
- The quality & ongoing checks are the biggest concern.



High Level – Strategic Messaging



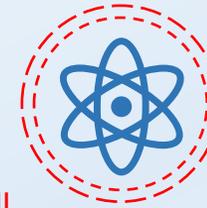
Mid Level – Operationalized Messaging



Low Level – Tactical Representation of Messaging



Gen AI



Small Language Model



Large Language Model



AB's Commentary

Even CEOs can get caught up in the abstract nature of the word "messaging." Simply put, it is the architecture of words & should represent how the company communicates across all external contexts.

With Gen AI at the core of content generation, sales & marketing teams will now be "programming AI in English." Teams must load high quality "seed" media into the machine to automate all output.

When loaded into AI, messaging provides the foundational filters that generative AI rely on for high quality, accurate, & efficient output. These are now called small language models (SLMs). 50

Example New Product Launch

Key Takeaways from adambloom.me:

- New product launches take a lot of resources.
- With this approach, resources are drastically reduced without a negative impact on quality.



Ensure all inputs are very high quality.

Ensure comprehensive coverage for all output types, even past using examples.

Sophisticated output for humans to fine-tune & feed back into Gen AI.

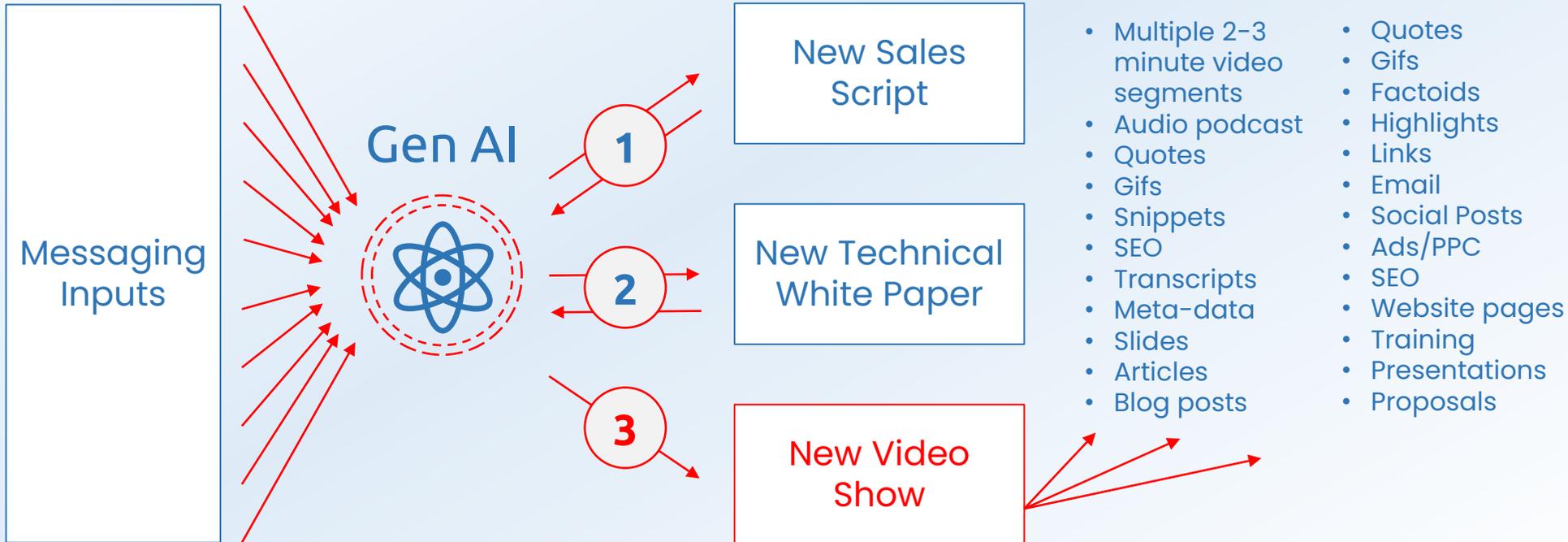
This step greatly increases quality as a form of AI training.

All input to the show included two steps of AI input to maximize the output effectiveness.

The output can support all campaign elements.

Additional Info

While feeding a great sales script can go a long way, quality inputs will save a lot of time & money downstream.



1

In step 1, the script is “supervised” & perfected by humans, then loaded back into Gen AI. This is pre-trained content.

2

Step 2 is the same process with technical content.

3

Step 3 produces new output.

Example Web-based Selling

Key Takeaways from adambloom.me:



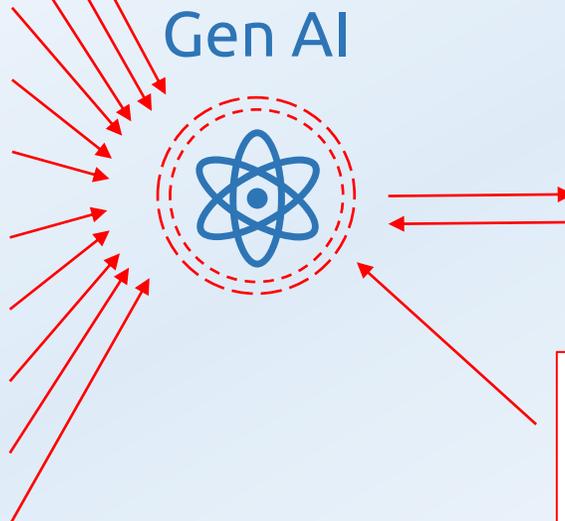
- With direct customer interactions, a human must exist in the middle—to judge quality & accuracy.
- The role is well filled by product marketers.

Website content already supports 50%+ of the B2B sales cycle if not 90%

Online FAQs

Web pages, forums, docs, etc.

Messaging Inputs



Teach & refine the model with HITL



Customer

Q&A via website with online Gen AI Chat Bot

Record Q&A for HITL Supervision



AE



Product



Marketing



BDR

Example questions that a customer can ask Gen AI

- What are the top benefits of your product?
- Can you provide a list of the top 10 most powerful features?
- Please give me a demo outline.
- Who are the top 5 competitors & what are the major differences?
- Who uses the product, please provide company size, industry, title, & any quotes.
- What is the business case & ROI for this type of solution?
- How much does it cost?
- How long to implement?
- What skills are important to do it?

Additional Info

When most people think of fully automating B2B sales, there is a knee-jerk reaction, “What if the machine does a better job?” This is a 20+ year old argument. Yes, salespeople are needed, but the need has changed.

The critical part with Gen AI is the “human in the loop” (HITL). Until the model is finely tuned, humans need to make sure the answers are great.



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Chapter 6

CX Process Changes

Sections

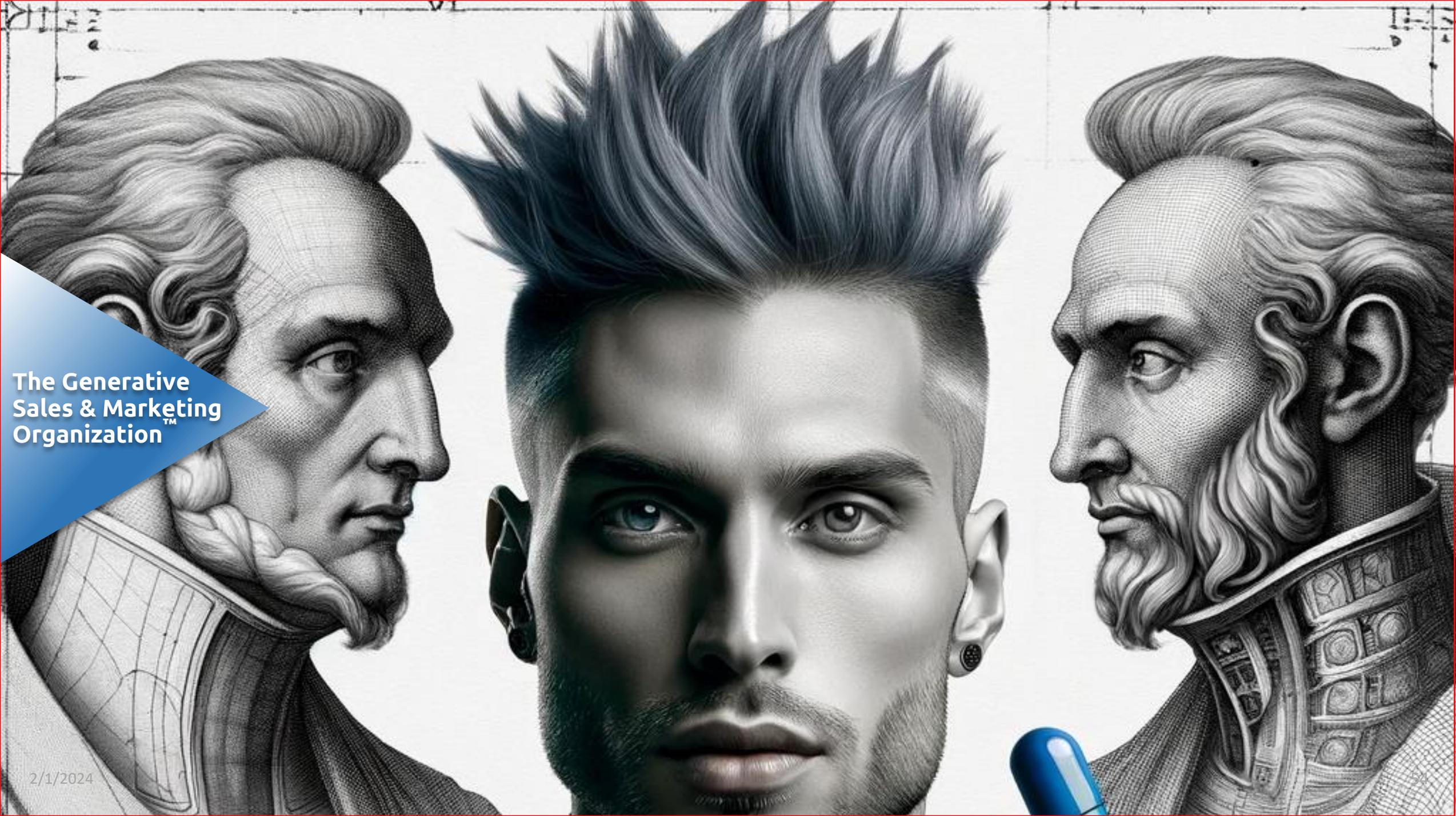
- Customer Experience Diagram Overview
- Example CX Interactions
- Sales-led vs Website-led
- Where Gen AI Content Fits
- The Sales & Marketing Opportunity

This chapter drills into the customer experience so that sales & marketing teams can begin to unpack all the areas of customer experience where Generative AI has an opportunity for impact.

It ends by providing clarity on what is at stake.

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B2B CX Interactions – Part 1

Key Takeaways from adambloom.me:

- This diagram expands over 4 pages.
- It orients readers to more complex diagrams (2-4).
- It shows 4 process areas: CX, product, human, CRM apps



The Customer Experience

Awareness

Engagement

Free Trial

Purchase

Use

Additional Sales

Your Software Product

White = no product use blue = use

Human Interactions
& Processes

White: No Human Interaction with Customers

Orange: Human Interaction with Customers

CX Applications: Website, CRM, Product Led Growth, & Product Apps

Additional Info

This row is the typical process customers go thru.

This row represents customer use of your software product (not including GenAI-based products).

This represents 2 interaction types—those with a human (orange) & those without (white).

Traditional transactional apps & business intelligence.

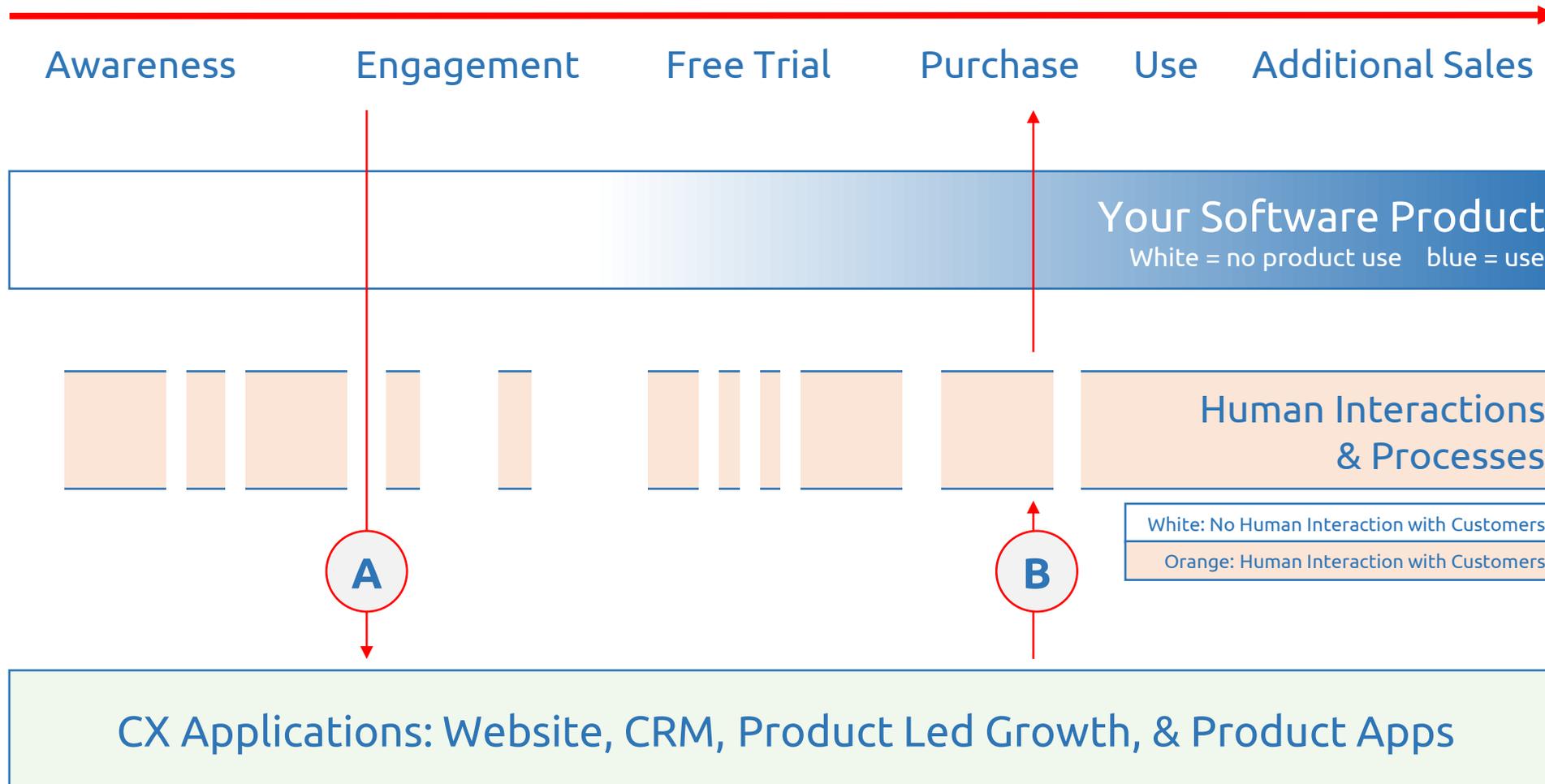
B2B CX Interactions – Part 2

Key Takeaways from adambloom.me:

- Part 2 highlights two example interactions.
- It provides context for the next page, which has a more complicated set of arrows & explanations.



The Customer Experience



Additional Info

This page adds two example arrows, A) one FROM the customer & B) one to the customer.

Arrow A might represent a website form-fill, & no employee touches it. It goes straight into CRM.

Arrow B might represent a quote sent from a salesperson to the customer, first taking data from the CRM.

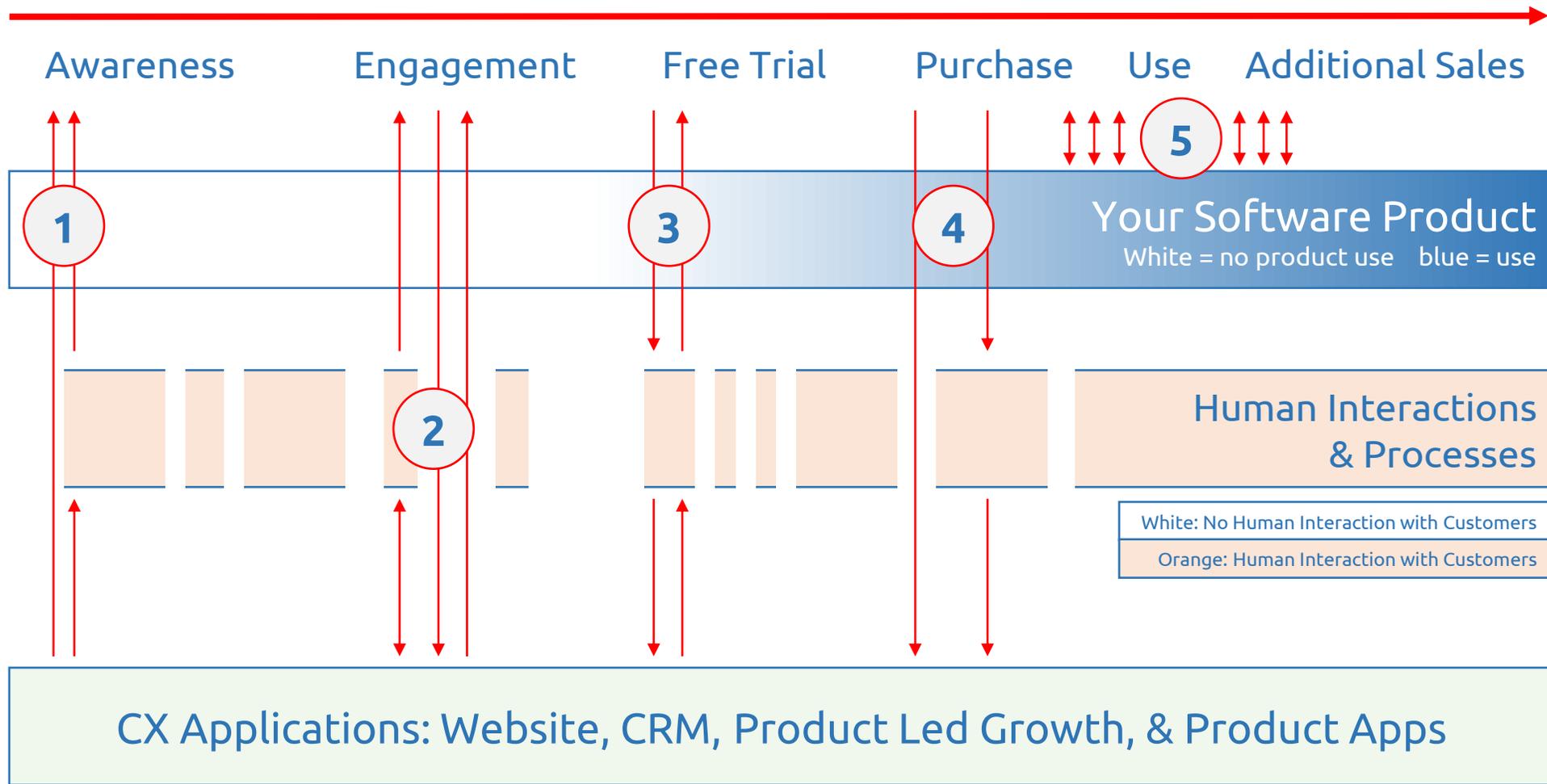
B2B CX Interactions – Part 3

Key Takeaways from adambloom.me:

- Part 3 highlights additional examples or use cases.
- Again, it provides context for the next page, which again, has more complicated arrows.



The Customer Experience



Additional Info

- 1 One outbound mass email & one sales-personalized 1-to-1 email.
- 2 One email from a salesperson, one customer meeting request, & one automated email confirmation.
- 3 Asking questions & receiving answers from a salesperson.
- 4 A credit card swipe, & a request for clarification.
- 5 Traditional apps & business intel.

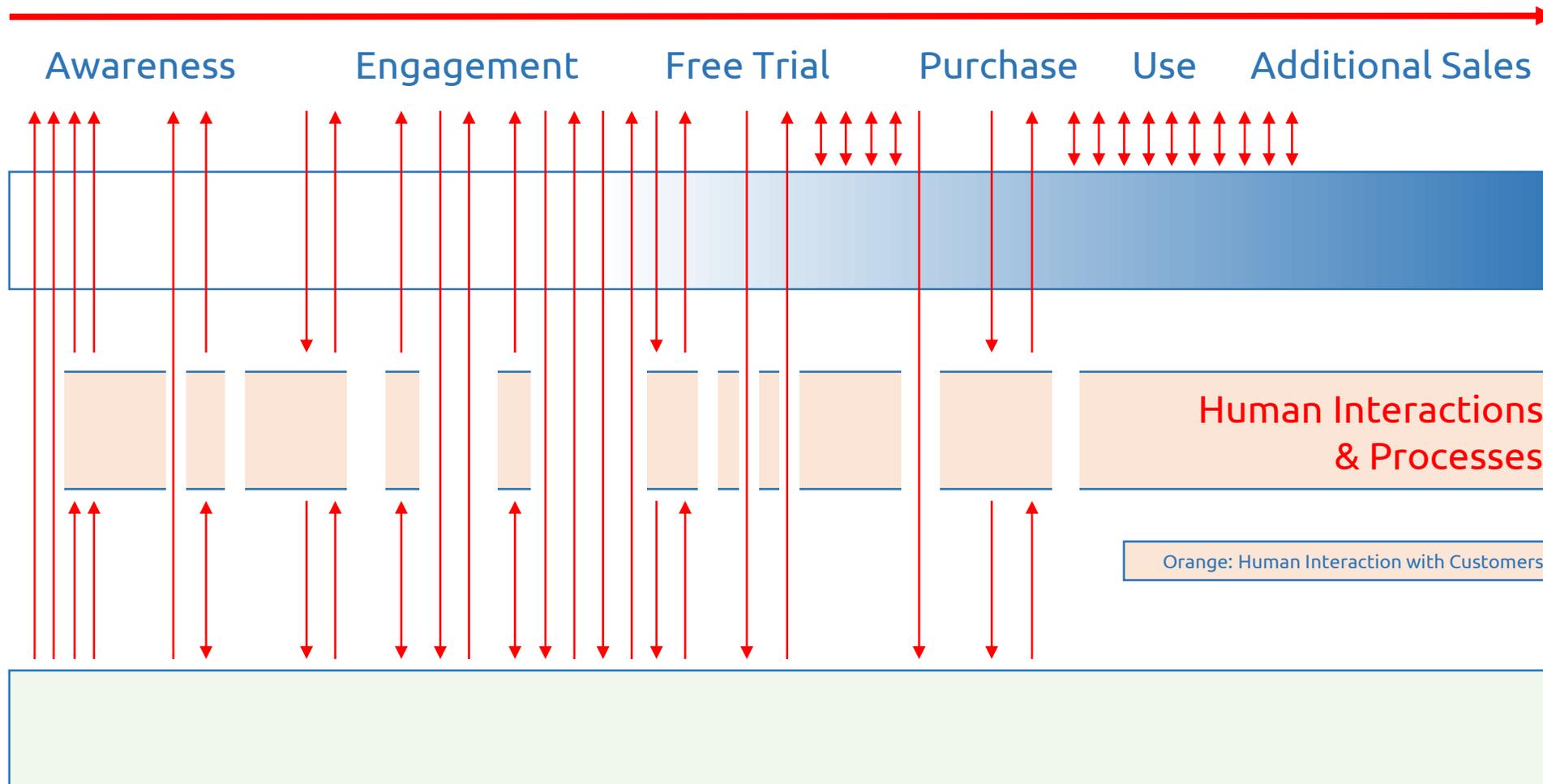
B2B CX Interactions – Part 4

Key Takeaways from adambloom.me:

- Customer interactions are very complicated.
- Automating humans is 100X more productive.
- Customer content & inquiry are the top opportunities.



The Customer Experience



Additional Info

For most companies, the set of customer journey interactions is highly complex & typically touches many systems.

The human interactions (orange boxes), focused on content, are where Generative AI fit best in 2024.

The priority opportunities for GenAI productivity improvement relate to 1) content generation & 2) customer inquiry.

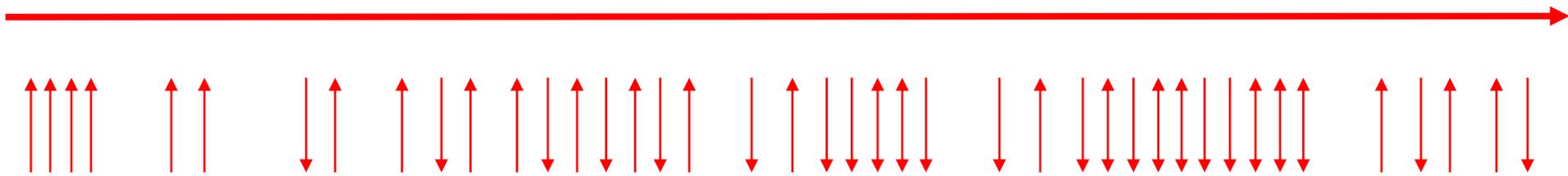
B2B CX Interactions – Part 5

Key Takeaways from adambloom.me:

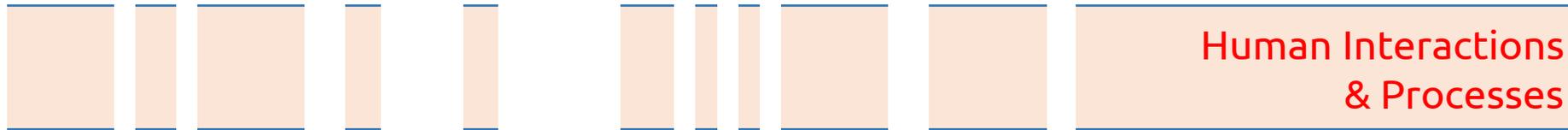
- Generative AI can scale sales & marketing 100X.
- Customers can ask GenAI about products & services.
- Employees can use GenAI to create ANY content.



The Customer Experience



Top Opportunities for Generative AI in Sales & Marketing



Human Interactions
& Processes

Content: Market & sales can create any type of content.

GenAI helps create it at a scale & at a speed of 100X or more—at least to the point of 90% complete.

Inquiry: Customers can ask any question of sales & marketing via external GenAI web apps.

GenAI answers at a scale of 100X or more—WITHOUT human intervention.

CRM vs Human Interactions with GenAI: CRM-to-GenAI interactions are much more complex & expensive.

Additional Info

Example GenAI use cases in **marketing**:

- Target market analysis
- Strategic messaging
- Outbound email
- White Papers
- Presentations
- Blogs & SEO

Example GenAI use cases in **sales**:

- Industry & company research
- One-to-one emails
- Presentations
- Solution designs
- Q&A
- Proposals



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Chapter 7

UI/UX/CX & Prompt Design

Sections

- Design Thinking in Layers
- Tech Summary Recap
- UI & UX Design with Gen AI
- UI Controls
- Tech Unpacked
- Design Thinking in Layers
- Ethics, etc.

This chapter is oriented towards product managers, UI/UX designers, & those interfacing with engineers to define approaches & solutions.

It focuses heavily on the concept of Layers in Design Thinking—both at the start & end.

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Design Thinking in Layers

A Visual Explanation (1/4)

While chapter 2 covered these concepts, it is worth another look. In writing, graphic design, video, music, architecture, PowerPoint & virtually every creative or communication task, people think in layers & filters (contexts).

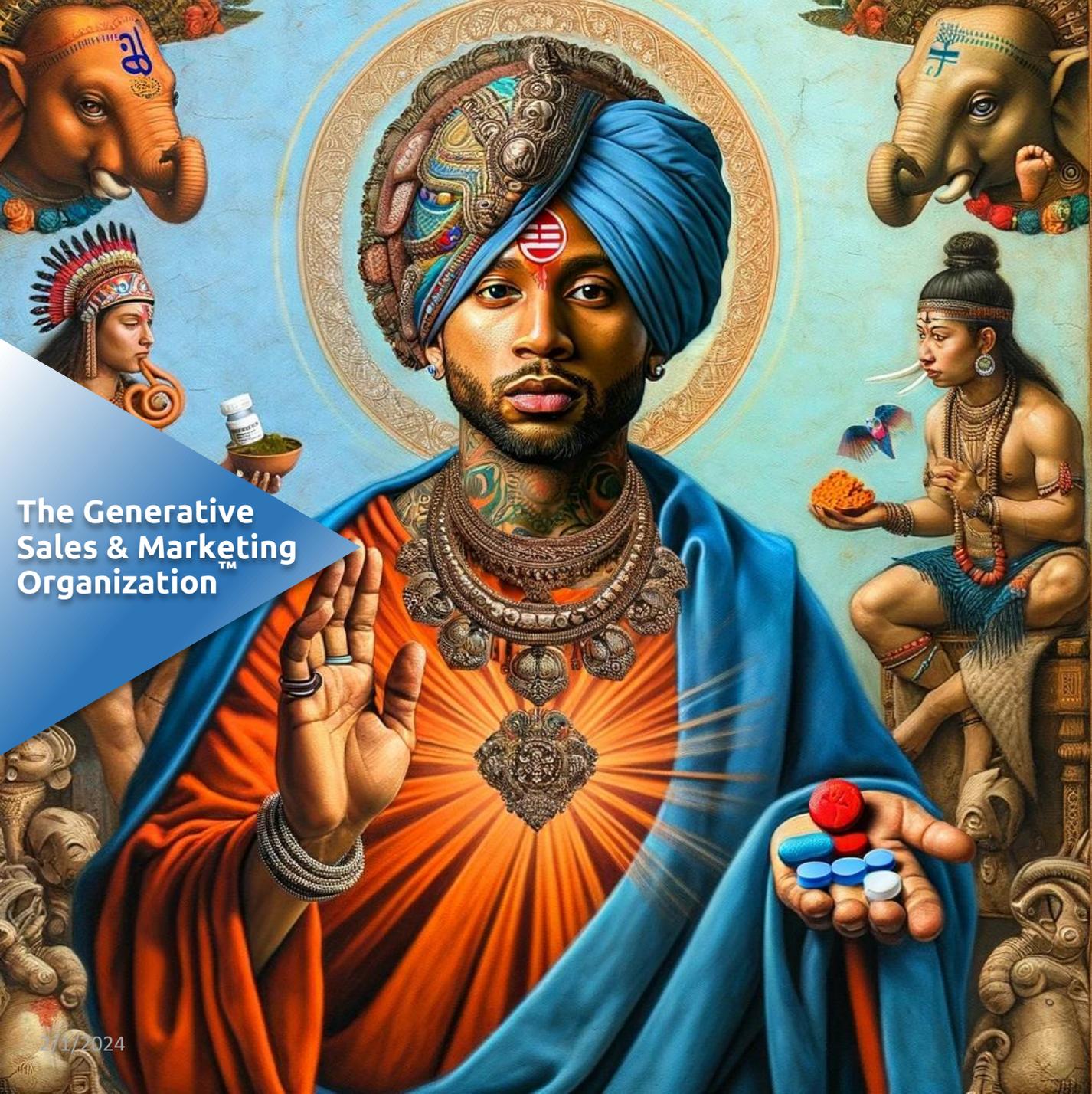
Gen AI art provides a comparison to the contexts of prompt design & engineering.

For the image to the left, I had already built up the image based on a few layers. The foundation layer was an African American male who looked like Morpheus—with a red pill in one hand & blue one in the other.

The next layer included a Gen AI request to recreate the image with elements of Leonardo DaVinci & elements of the Hindu deity Shakti. Then, I added another layer, which was asking for an American Indian person as the main subject.

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Design Thinking in Layers Continued (2/4)

In Photoshop or even in social media picture apps, designers use layers to define the background, main subject, foreground, & more. This way, they can do things like have 5 main subject layers, each with a different person. The background & foreground become a template.

In this example, I resubmitted a set of words to act as a new “input layer” to Generative AI. All I said to my GPT was “more Ganesh.” It took the American Indian person & converted them. It chose a Sikh Dastar (headwear). It added additional elephant (Ganesh) elements. It kept elements of Leonardo DaVinci, etc.

This can be done with sales & marketing copy. The input you give it matters as well as the layers, filters, & source data. For example, instead of “more Ganesh,” I could have said, “more written for a CFO.”

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Design Thinking in Layers

Continued (3/4)

This picture explains part of the art, science, & quality assurance needed to program Generative AI “in English.”

DALL-E produced two responses to “more Ganesh,” & this is the second one.

If we wrote down the list of meta data describing this picture, we would find many commonalities—clearly using prior inputs. This is why the images all look like they are “part of the same family.”

However, everything is unique from the other picture. If you remember back to the 10-year-old example, the inputs were much more specific when it came to the clothing. We could do the same here. We could also ask it to use a specific image library to pull from. The feedback loop, data-set, & detailed instructions can go deep.

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2. Make it a job description with metrics.

6. Write one email in 20 words for the CFO.

3. Map our top customer results to their metrics.

Design Thinking in Layers Continued (4/4)

Here is a new layer of input—a new iteration.

“Please turn this into a woman, who is about 45 years old. She should be wearing a suit have cool dark glasses. She represents a chief financial officer for a big company. She should be holding a spreadsheet in each of her many hands. The pills should be either red or blue only. Only show two elephants. Use a light, futuristic background.”

The new inputs changed the picture (let’s call it a context) drastically. It didn’t get everything right in detail. However, the themes of what I asked for are quite accurate.

Now, apply this thinking. The blue overlay boxes (same layers from Chapter 2) provide context to what is possible with ANY sales & marketing copy (except diagrams are currently too hard).

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4. Make a list comparing metrics to our features.

1. Create a profile for the CFO buyer.

5. Try again—make features more detailed.



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Recap: Gen AI – Tech Summary

Key Takeaways from adambloom.me:

- The process seems simple for a user.
- However, this is currently the most innovative technology on Earth. The technical answer is a mouthful.



Users put data in.
Users get data out.

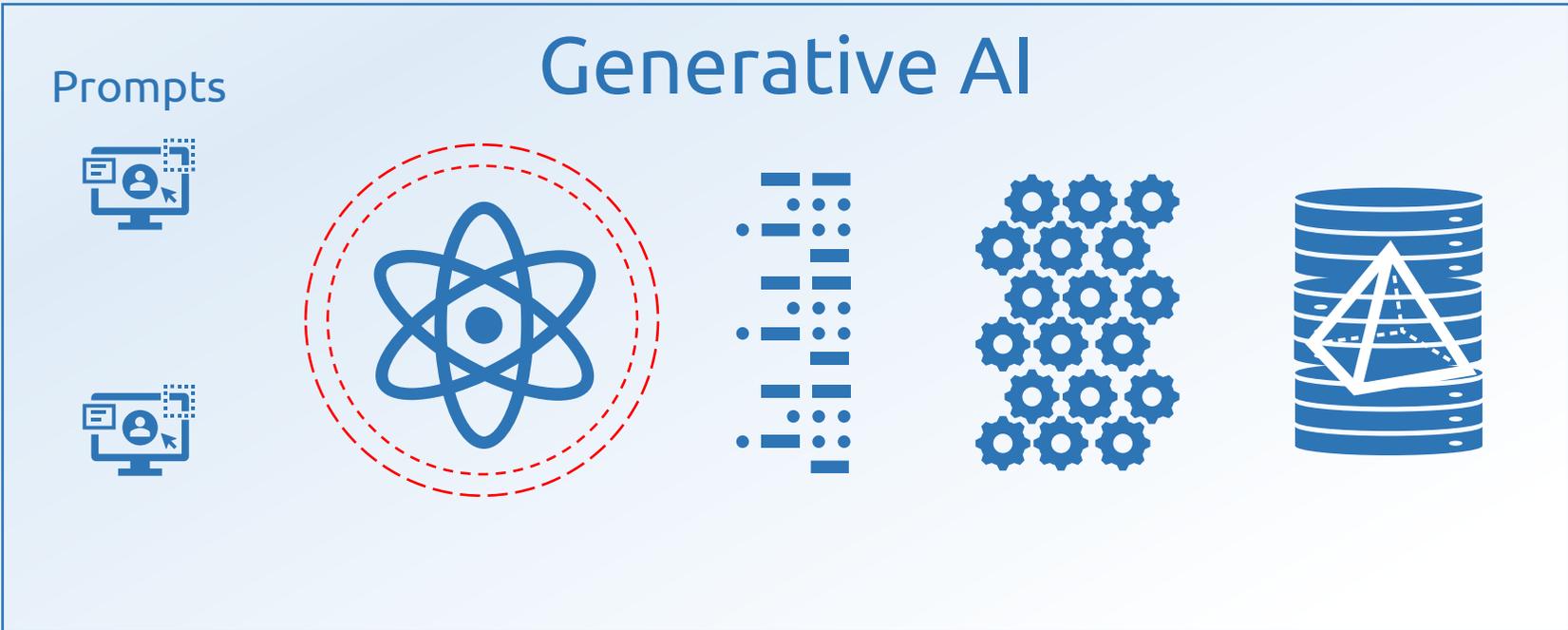
Captures & computes input via UI, then produces output via UI.
Runs specialized logic, flows, math, data queries, & more—on a vector database with pre-trained data.



Employee



Customer



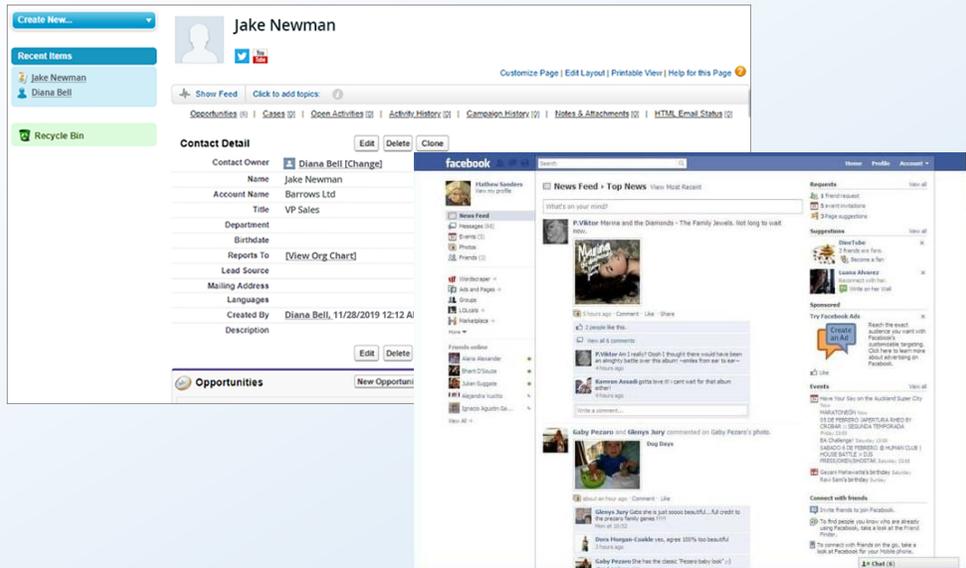
UI/UX Design with Gen AI

Key Takeaways from adambloom.me:

- Do not treat UI/UX design the same as the past.
- Do not treat user acceptance testing the same either.
- The design process is data heavy, like AI in the 2010s.

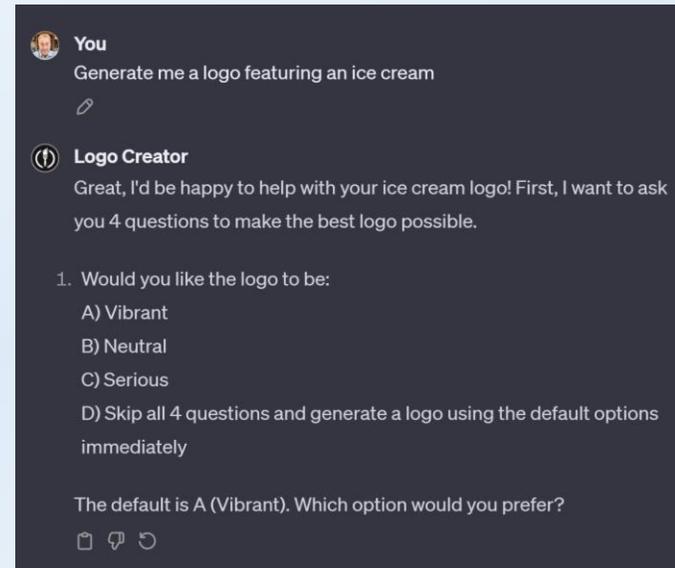


UI/UX Design in the Past



- In the 1990s & 2000s, UIs were mapped to rows & columns of a database—or posts & metadata.
- This resulted in list views, & form views to create, read, update, & delete data (CRUD). Report/BI, social media, & wizard views were also common.
- While mobile/social/geo app trends had impact, CRUD thinking is 40 years old & a commodity. Posts are 25 years old—IRC chat is 35 years old.

Thinking Differently



- Gen AI requires fresh, innovative thinking & places the UI designer in a very different role vs. the past.
- Chat interactions requires assessment of many possible errors from the generated text or other output. Feedback & iteration are critical to success.
- UI/UX design requires conversational thinking. Acceptance testing is totally different.

Additional Info

Gen AI presents a tremendous paradigm shift in UI/UX design.

While many UI input & output controls—like buttons, drop-downs, lists, & forms—are brought forward from the past, the central part of the UI/UX is large format text inputs & outputs.

For developers, UI development libraries, frameworks, & toolsets are evolving rapidly.

Example Prompt UI Controls

Key Takeaways from adambloom.me:



- Beyond text, many types of UI controls exist.
- They provide input & constrain the options available.
- Prompt design & engineering is a specialized skill.

The screenshot displays a variety of UI controls:

- Buttons:** 'CONTAINED' (highlighted in blue), 'OUTLINED', 'B', 'I', 'U', 'Search', 'Clickable Deletable' (two instances), 'Web Clipboard', 'Label', 'Required *', 'Disabled', 'Gender' (Female, Male, Other), 'Volume', 'Age', and a date picker.
- Form Fields:** A search bar, a text input for 'Enter sequence and press Tab', and a date input 'MM/DD/YYYY hh:mm aa'.
- Sliders:** 'Temperature' (set to 1), 'Maximum length' (set to 256), 'Top P' (set to 1), 'Frequency penalty' (set to 0), and 'Presence penalty' (set to 0).
- Navigation:** Breadcrumbs 'MUI > Core > Breadcrumb' and a link 'Links'.
- Other Elements:** A star rating (3 stars), a progress indicator (1 of 10), and a lock icon.

Additional Info

Prompt UI is evolving in various ways. For example:

- A drop-down may control if a response is in the voice of Darth Vader, Luke, or Yoda.
- Chips may support meta-data.
- Toggles may force context.

The UI examples shown to the left are taken from mui.com, one of the most used UI component libraries available.

How Gen AI Works – Unpacked

Key Takeaways from adambloom.me:

- The tiers are very familiar & follow past patterns.
- However, the way to do it is quite different.



#	Layer	What it does
1	User	Chooses the right inputs via the UI & also iterates inputs based on prior responses to fine tune answers.
2	UI Design	Gives options for buttons, text, sliders, switches, meta-data selections, drop-downs, & other controls. Results are also rendered & formatted in a certain way.
3	Prompts	Connects UI with UI logic to support inputs, rules, models, etc.
4	Business Logic	Handles data, agents, retrieval, loading, calculation, search, evaluation/quality, loaders, models, histories, & much more.
5	Storage & Data	A newer type of data store (vector) turns “words into math” with machine learning. This supplies “the magic.” Data trains responses & impacts quality.

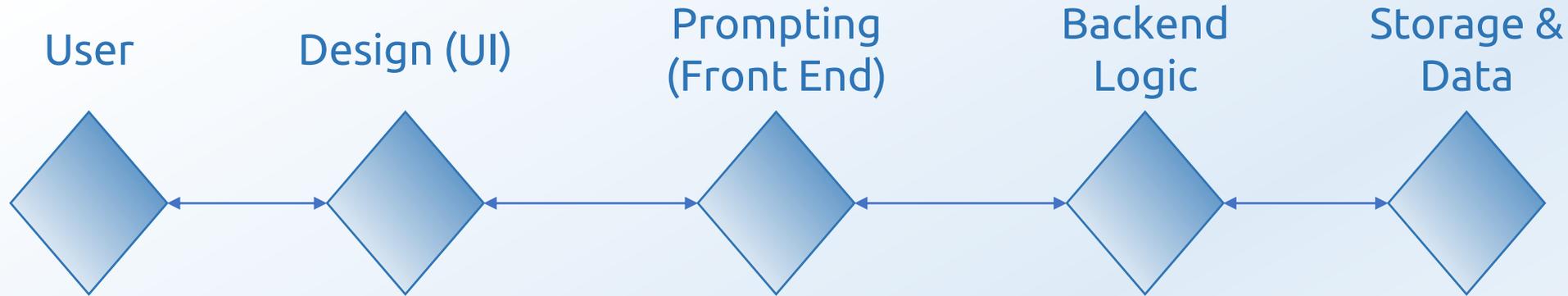
Additional Info

1. Users can both use & train the application.
2. The UI defines, input, output, & administration.
3. Logic enforces certain input & output rules.
4. Provides all the necessary rules & processing for inputs & outputs.
5. Can be purpose built for certain domains like legal.

Design Thinking in Layers

Key Takeaways from adambloom.me:

- There are many layers to think through & design for.
- As the team iterates through releases, improvements may require development at multiple layers.



When it comes to this layer, the UI designer & prompt engineer have limited control over users' input.

On output, the user can give feedback on the quality of the result. This is a top use case for improving AI.

In effect, the user is also trained by the prompt.

- With UI design, controls can be added to the text input (as shown on prior page).
- When added, these can provide ANY additional text, graphics, audio, etc.
- When the designer tests & sees a better result, they will often consider adding new input "behind the UI." The user won't see it, unless it is exposed.
- The process is highly iterative.

With front-end logic, rules are often applied. For example:

- No cuss words.
- Required field.
- Multiple text input boxes are merged in the background.
- Negative inputs, such as "don't use the word 'fantastic.'"
- Steps of input
- Providing examples of expected response structure

Much like the difference between a frontend & backend engineer, this logic does the heavy lifting, for example:

- Retrieving data
- Loading data
- Determining sequence
- Output parsing
- Rules processing
- Caching & scoring
- Model interfaces
- Memory/history data

Three types of data are stored & used. These are called models.

1. Many foundational data sources exist, relating all words with math.
2. Custom seed data is provided to focus or filter responses.
3. Custom database data, is less common. It comes in rows & columns.

Additional Info

As the app's functionality is designed & engineered, each layer provides a potential point to alter the application's functionality.

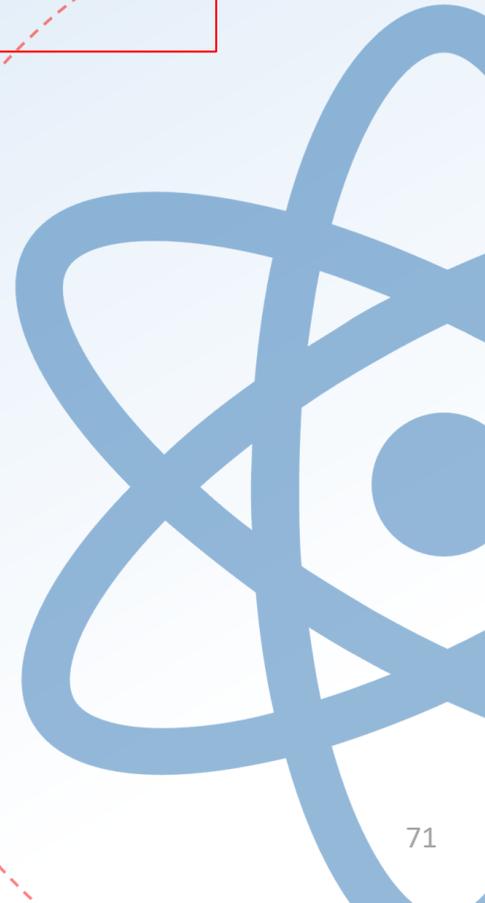
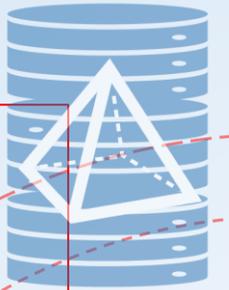
In building a solution, the team iterates back & forth & applies design thinking to improve the output.

Some use cases may require changes to multiple or all layers of the application.

A Word about Security, Ethics, Compliance, & Governance

This book does not intend to take a dive into the depths of Generative AI in relation to the topics above.

However, it must be considered in every program—and as a first-class citizen.





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Chapter 8

Prompt Engineering

Sections

- Requirements Definition
- Development Processes
- Key Gen AI Terms
- GPT Mentions BETA
- Gen AI App Selection
- CRM + Gen AI Roadmap

This chapter provides cross-functional teams with concepts & frameworks to think through & discuss. To define a program, project, or new operation, it is important to team members on the same page about requirements, development, technology, selection, & roadmap.

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Requirements Definition

Key Takeaways from adambloom.me:



- Defining Generative AI requirements is very different than the past & must change.
- In particular, prompt engineering requires iteration.

Traditional Requirements

Stories & epics are typically referred to in Agile development, & the prior art was referred to as use cases. Here is an example:

Salesperson Creates New Contact Record:

- User navigates to the Contact Screen
- System shows Contact list view.
- User presses “create new contact”
- System shows a form with all the available & required fields (see details table).
- User clicks save.
- System stores the data.
- System triggers workflow to find duplicates. If found, the system notifies the user in a pop-up box, in real time. Before user can leave the screen, they must choose to use the duplicate or not.
- System triggers workflow to get additional small business email & address information from a database.
- System flags record with a checkbox for “3rd Party Validated.”

Who defines these & how?

Requirements with Gen AI

Generative AI Use Cases

Importantly, when any text can serve as input & any text can serve as output, the nature of defining requirements changes drastically. They become much more complex with far greater variables & must be user (or machine) tested again & again.

Salesperson Generates Contact’s Next Email:

- User navigates to the Contact Screen.
- System shows Contact list view.
- User selects a Contact record & clicks the “Create Next Email” button, which begins the Generative AI process.
- The system shows a summary about the contact & asks the salesperson to check the boxes of LinkedIn profile sections then write a short blurb about the purpose of the email.
- User provides the input.
- System adds or changes additional input (behind the scenes) & generates the email, including recommendations for Contact’s interests, groups, & recent jobs on LinkedIn.
- User edits email & presses send.

Additional Info

Use cases & stories worked well when users mainly created, read, updated, or deleted (CRUD) records.

With Gen AI, the system needs to add instructions, UI controls, or constraints for the input & output. This is not CRUD. It is more like meta-data for generating new text.

Developers won’t have final requirements until output testing is done by users.

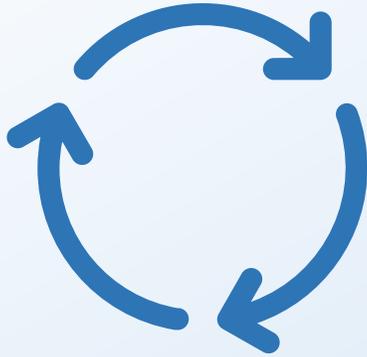
Development Processes

Key Takeaways from adambloom.me:

- At the smallest scale, hourly iterations are doable.
- Except for the largest scale, waterfall or semi-agile will not support the needs of sales & marketing.



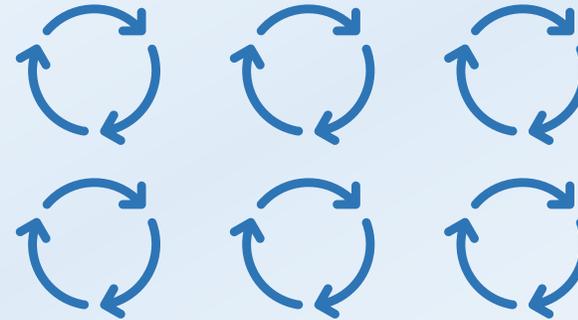
Traditional: Monthly Releases



Traditional lean iterations or waterfall processes

- Lean iterations are typically 2 to 4 weeks between releases.
- Waterfall can be months.
- Developers typically work with only app admin data, like default values.

Gen AI: Daily Releases



Rapid, lean iterations which include heavy data versioning/management

- Rapid, lean iterations may be hourly or even daily between business & IT.
- The speed is due to prompt design.
- Instead of just code, data, & data processing require much more business context.

Additional Info

Those who apply traditional waterfall methods will find themselves unable to move forward.

On an hourly or daily basis, users can give feedback to developers, developers can adjust prompts or add new data, & users can review the results again.

There are exceptions based on company size, solution, complexity, & data availability.

Gen AI Terms to Understand

Key Takeaways from adambloom.me:

- Engineering approaches to Gen AI solutions play a considerable role when defining requirements.
- Many trade-offs exist regarding cost, accuracy, & speed.



For technical business leaders who are getting up to speed, here is a list of basic engineering concepts to understand.

#	Concept	Explanation
1	NLP	Natural language processing supports recognition of speech, sentiment, translation, summarization, & more. This category of software has existed for decades. Gen AI radically innovates in this area.
2	Prompt Engineering	This is about designing & developing inputs & outputs for a Gen AI request. It can include question structure, additional context, style, instruction, role specification, negative input, & more.
3	Zero, One, & Few-shot Learning	These concepts point out the importance of giving examples to the Gen AI model when you make a request. Zero-shot happens when you submit a request & provide no additional information, e.g., “Please create an article about software.” One-shot includes the submission of the expected output along with the request, e.g., typing in, “Please create a 500-word article with these 5 sections.” It will use the example. Few-shot includes more examples, & the results have shown to be much more accurate with this type of approach.
4	Supervision	The feedback loop drives machine learning improvements—telling the algorithms that one output is better than another. Supervised learning is where humans look at results & give feedback—also called reinforcement learning from human feedback (RLHF). Unsupervised learning uses algorithms to teach the machine. Semi-supervised combines both. There are many types of learning.
5	Conversation Memory	In a single session, AI can remember & refer to the flow & context of a past conversation. The memory is defined by amount of text it can remember when a user sub-queries a prior query.

Additional Info

As of 2024, Generative AI research is moving at an incredibly fast pace.

Every day, announcements are made about new research in the area—all about improvements to prompt engineering & the underlying data sets.

All approaches typically make the most significant engineering trade-offs between cost, accuracy, & speed.

A Word About GPT Mentions

Beta (for Plus) as of 01/26/2024

Mentions are a transformative feature. To say simply, they allow a user to interact with multiple bots at once.

This is transformative for several geeky reasons:

- It integrates two different pieces of software (agents) in one @word—radically simple.
- It imports & references like code libraries, which creates extreme extensibility.
- It provides data interchange like middleware.
- It is exceptionally cheap & easy to try many use cases.
- Separation of concerns is built in—carefully.

For business peeps, these things were major developer breakthroughs, which drove significant business value & lowered IT costs. For example, it means users can ask the Kayak Bot & the AllTrails bot—at one time—to coordinate a trip for you—and get a great answer. This reinvents digital partnerships.

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DALL·E



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Here is the transformed image, now showing a 30-year-old man with a beard in the style of O.A.D. Persia, holding a red pill with red mist and a blue pill with blue mist. The background retains the blend of Leonardo da

Beta GPT mentions



Type @ to mention a GPT and add it directly into your conversation



Message DALL·E...

Gen AI App Selection

Key Takeaways from adambloom.me:



- Technology selection is going to be high-risk in 2024.
- The space is too new—only the largest tech companies on the planet have fully figured it out.



Key Questions to Ask

- Do we use consumer grade apps, professional point solutions, professional suites, libraries, existing vendors, new vendors, open source?
- What are the vendor roadmaps?
- How do we integrate—where, why?
- How much control exists per layer?
 - Is the UI, code, or data changeable or “hard coded.”
 - If changeable, are there configuration tools at each layer?
 - Can you add or change code?
 - Can you add or change data?
 - Where do we need full control?
- What are the cost projections, at least in terms of low, med, high over time?
- Where can we achieve the most value with the least investment?
- What are the vendor roadmaps?
- Who should lead the team? It will take daily effort to organize & report on progress.

Additional Info

Selecting apps isn't going to be simple because the market is now full of vendors who are still quite young & incumbent vendors with new products. Every software company is adding Gen AI to its offer.

People are still learning how to implement it—as the popularity is only one year old.

This should all start with identifying the long, mid, & short-term business value. Then prioritize.

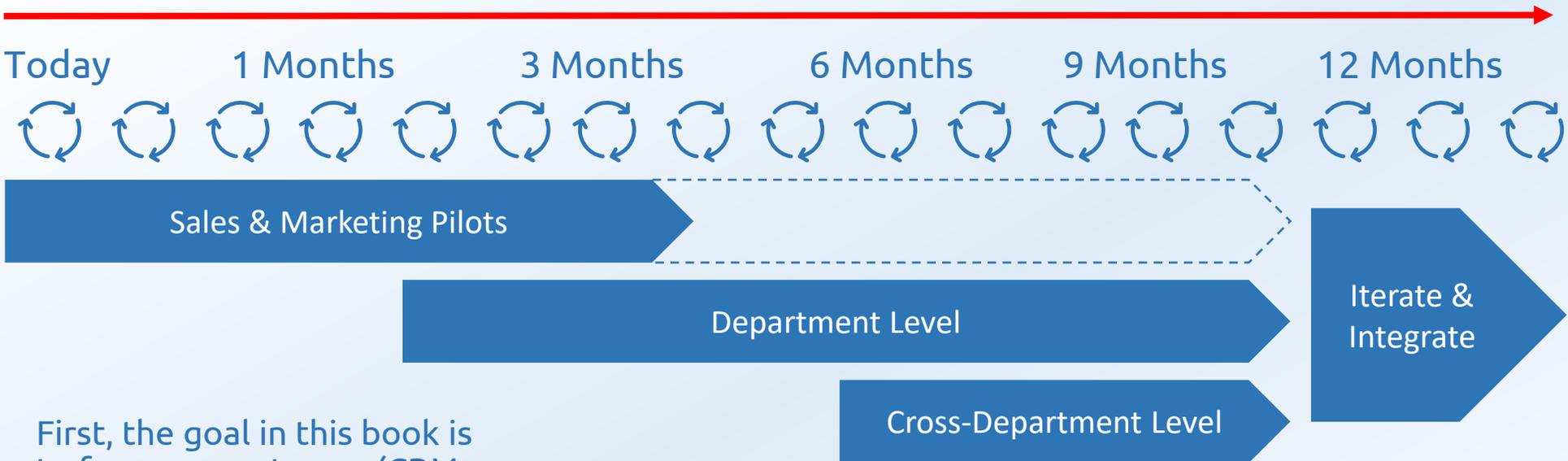
CRM + Gen AI Roadmap

Key Takeaways from adambloom.me:



- Start pilots right away to start learning right away.
- Value is available now, at a low cost for the front-line.
- Pilot experiences drive up quality decisions over time.

Timeline



First, the goal in this book is to focus on customer (CRM & CX) content generation for both employees & customers.

This book promotes content/media as the most valuable investment area now & over the long term.

Pilots should start right away & be organized to make immediate decisions.

Pilots will add value alone & deliver within 2 months. They feed department & cross department plans with proof of results.

The cross-department plans will force B2B sales & marketing to integrate in a way they have rarely done in B2B software.

It will look like PLG models & extend them. Caution on the impact to quotas & metrics.

Additional Info

At this high level, planning a roadmap isn't terribly hard. This diagram provides a starting point, which looks like many CRM implementations.

The flow of this approach allows for early learnings to be incorporated.

Within three months, there is no question that sales & marketing can see a 10X result. Like any process change, it requires discipline.



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Are you gonna go
for it?

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The End

Hello Again!

This is the second to last page (until version 2.0 :).

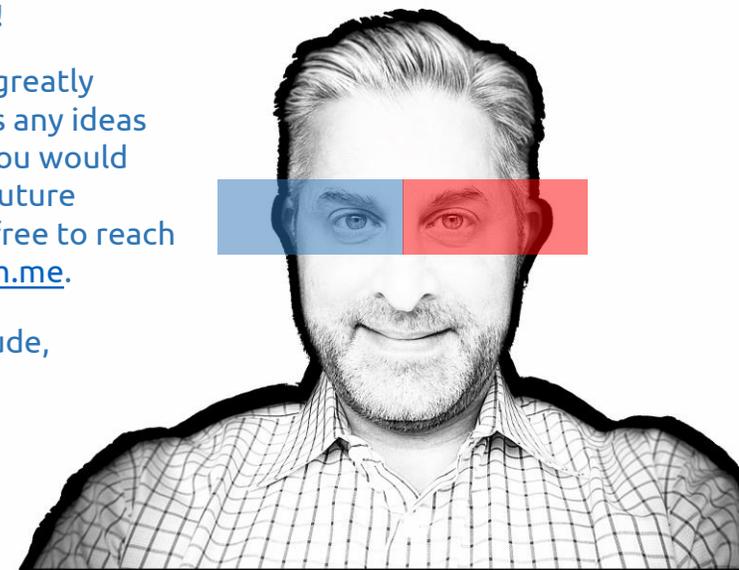
Thank you for spending time with me & for the opportunity to help you create tremendous value—while keeping in mind—the huge transition employees will go through on this Gen AI journey.

My goals & self-check points were three-fold, & I hope you agree that I accomplished them:

1. “Would this help prepare my daughter to thrive in a different business world?” Absolutely.
2. “Will this drastically help B2B software leadership teams through the Generative AI Journey™?” Yes.
3. “Would I present these concepts at a shareholder, venture investor, board, or executive leadership team level?” When appropriate, yes!

Any & all feedback is greatly appreciated as well as any ideas for improvement. If you would like to participate in future versions, please feel free to reach out at hi@adambloom.me.

With Immense Gratitude,



Author Bio: Adam B. Bloom - Software Growth Executive – Generative AI Expertise

Differentiator #1: Generative AI, AI, CRM, BI, & Low Code Experience

- Led sales/engineering, partnerships, & channels (Series A - Foundry.vc)
- Designed Gen AI products for sales automation & advised 30+ Gen AI startups/solutions
- Engaged in sales & marketing for ~180 startups, companies, & partners in 18-months
- Executive leadership for product led growth, go to market motions, & messaging

Differentiator #2: Extreme Breadth—28+ Years Interdisciplinary Roles

Software Industry Sectors		Software Departments		Cross Functional	
- CX/CRM	20+ yrs	- Gen AI	1 yrs	- Product Led	
- B2B Media	20+ yrs	- Low Code/OSS	6 yrs	- Growth	6 yrs
- BI	20+ yrs	- PaaS/IaaS	5 yrs	- Go To Market	
- AI	8 yrs	- Dev Platforms	6 yrs	- Product Mgt.	3 yrs
				- Leader	10 yrs

Differentiator #3: Highly Innovative Thinker & VC Studio Advisor

- B.S. in industrial design—applied design thinking to 250+ “business outputs”
- App, UI, art, content, & writing experience in all forms of B2B media, some B2C
- Advisor to 10X founder; co-founder angel fund w/3X founder; founder of FinTech spinoff

Differentiator #4: Neuropsychology in Leadership & Software Sales

- Extremely skilled at building fast, authentic interpersonal relationships
- 14 years study of neuro-psychology & gratitude
- Created gratitude blog with 3500+ posts in 10-year period
- Long-time student of meditation & limited practitioner of life coaching

Differentiator #5: Cross Functional & Executive Leadership

- Leader of product led growth & go to market programs at 6 companies
- VP of Marketing/Strategy (executive team) at \$25M company
- Consulting leader for \$30M+ CRM implementations at 2 telecom companies (30+ staff)
- Led vision, plan, implementation, & ops for Siebel Online Community (across 12 VP staff)
- Led vision, plan, implementation for Oracle CRM implementation (100+ staff engaged)
- First product manager at WebMD (1997) for B2B & B2C apps (30+ staff on team)

Personal Missions & Passions

1. To apply all my life experiences, failures, & knowledge as well as my spirit, passion, & personality to helping others in business & in life.
2. To increase business outcomes alongside human wellness outcomes.
3. To use my darkest pain & study of neuropsychology to help others.
4. To spread a next-gen business philosophy from working with 70+ CEOs.
5. To continuously teach my 10yo daughter to use generative AI for life.

Top Results & Metrics Impacted

1. Advised BengalHV.ai launch & VantageHealth.ai commercialization.
2. Prepared/pitched/received initial investment in a \$25-100M spin-off
3. Led product strategy to increase valuation \$35M to \$110M
4. Launched fast adoption CRM product (year 1 pipeline \$15M)
5. Grew digital ad results 10X; grew pipeline 450%; helped close a \$30M
6. Helped \$120M health-tech identify a pursuable \$400M growth strategy
7. Drove year 1 & 2 pipeline for \$4B-IPO unicorn (year 1 revenue = \$40M)
8. In 6 weeks, ID-ed a \$70M-140M margin increase via CX/EX/AI product

Experience Timeline

Average Tenure: 3+ years	Range: 1 to 6 years	% A Round: ~50%
1. bengalhv.ai (Seed/A/B)	Early Stage Venture Advisor	2022-present
2. vantagehealth.ai (PMF)	Early Stage PMF/GTM Advisor	2022-present
3. 8base.com (GenAI/LCAP)	CRO's Revenue Leader	2022-2023
4. SaaSOptics (SaaS FinOps)	Spin-off & PLG w/4X founder	2020-2021
5. NOW (Startup Fintech)	CEO's Data-driven CMO-type	2019-2020
6. ZOOM Int (Mkt. Leader)	VP Mkt/Product/Strategy	2016-2018
7. Pivotal.io (Unicorn)	Evangelist (Media Flywheel)	2011-2016
8. Unica (Mkt. Leader w/Exit)	Dir. Product Marketing	2007-2010
9. 1st Podcast/show Network	\$50M Invested, KPCB-backed	2006
10. Oracle (\$20B revenue era)	Cross BU/Functional Biz Lead	2004-2005
11. Siebel Systems (Unicorn)	Director CRM/Community Ops	2001-2004
12. Kinzan.com (Musk vs KR)	Sales Engineer/Product Mgt.	1999-2001
13. iXL/WebMD (Unicorn)	Founding Product Manager	1996-1999

Venture Addictions

- Kid, high school biz (1990), college founder, WebDDS ('99), CMGC ('04)
- 2014-21: CRR, XMENTE, VPP, Armour, Workn Labs, Gro Co – 18X multiple