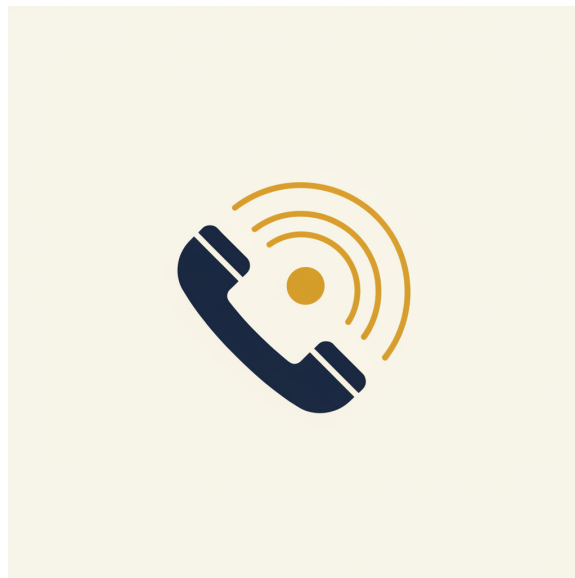




TIER 2 - WORK APPLICATION * V1.0 -- MAY 2026

R SALES CALLS AND PROSPECT RESE

Pre-call prep that surfaces the right questions. Post-call follow-up done right. The live-listening anti-pattern and why you don't go there. And the bigger framing -- the wins are in prep + recap, not the moment.



BY

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v1.0 -- May 2026

Anyone in a consultative selling role -- small-business owners, freelancers, contractors, B2B salespeople -- who runs discovery and pitch calls and wants to show up sharper without crossing into creepy AI territory

15-20 minutes

Free. Forever.

EDITION

AUDIENCE

READ TIME

COST

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Three more modules in Tier 2:

SECTION 1

The prep-and-recap pattern

Where AI helps in sales

There are three points in a sales call where AI could theoretically help. Two of them are real wins. One is an anti-pattern.

Pre-call prep (real win). Researching the prospect, building your question list, surfacing the angles you'd otherwise miss.

Post-call recap and follow-up (real win). Turning rough notes into a clean follow-up email within hours, capturing the commitments, scheduling next steps.

Live AI listening during the call (anti-pattern). Creepy. Often illegal without disclosure. Damages trust if discovered. Doesn't actually help you in the moment because reading AI output while you're supposed to be listening to the human is divided attention.

This module is the two wins. The anti-pattern gets a brief callout and then we leave it alone.

What you'll have by page 12

By the end of this primer:

- **The pre-call prep workflow** -- 15 minutes from "I have a call with X" to walking in informed.
- **The post-call recap workflow** -- turning rough notes into a follow-up within the hour.
- **The follow-up email pattern** -- what to send, what to skip.
- **The live-listening anti-pattern** -- why not, and what to do instead.

The sales win isn't in the moment of the call. It's in the prep before and the follow-up after. AI compresses both. The moment itself is yours -- and it should be.

SECTION 2

The pre-call prep workflow

15 minutes of structured prep, every time

The unprepared sales call is the one where the prospect names a competitor and you've never heard of them, mentions a project that you can't connect to anything you know about their company, asks about your pricing model and you fumble. Each of these is solvable with 15 minutes of prep.

The pre-call prep workflow:

"I have a sales/discovery call tomorrow with [name and role] at [company]. Quick prep -- walk me through: 1. What I should know about [company] -- what they do, their typical buyer profile, any major news in the last 12 months. 2. What I should know about [name] specifically -- their role, their typical decision style, how they came to be in this seat. 3. The 5-7 questions I should ask in this discovery call given that I sell [your service/product]. 4. The 3-5 questions THEY are likely to ask me, and the right framing for each. 5. The 2-3 ways this call could go sideways and how to handle each."

You spend 15 minutes reading the output. Maybe 5 more minutes verifying anything specific via a live source (their LinkedIn, their company website, a recent news article).

The AI output will be partly fiction -- pattern-matched from training data. Verify the specifics before quoting them. But the STRUCTURE -- the question list, the likely objections -- that's reliable enough to walk in confident.

What to verify before the call

- Specific names and titles AI gave you -- confirm on LinkedIn
- Specific company facts (recent news, recent funding, leadership changes) -- confirm on a news search
- Any specific number AI cited (revenue, employees, etc.) -- confirm or remove from your prep

If you can't verify something, don't use it in the conversation as if it's known fact. "I read that you all just expanded into the X market" is a powerful prep move IF it's true; it's a credibility-destroyer if it's not.

SECTION 3

The post-call recap workflow

Speed matters

A follow-up email sent within 4 hours of a sales call carries more weight than the same email sent the next day. The prospect's memory is fresh; your professionalism signal is strong; the next-step ask is easier to honor.

Most salespeople miss this window because the post-call write-up takes 30-45 minutes and they don't have it before the next call. AI compresses it to 10.

The post-call recap workflow:

- 1. Capture notes during the call** -- typed or voice-recorded with disclosure. The transcript or notes are the input.
- 2. AI structures:** > "Just finished a 45-minute discovery call with [name] at [company]. Notes attached. Walk me through: > 1. The 200-word summary of their situation as I understand it now. > 2. The specific pain points they named (verbatim quotes if possible). > 3. The budget signals or decision-process signals they gave. > 4. The questions they asked me that I should follow up on. > 5. Three concrete next-step proposals to include in the follow-up email. > Then draft a follow-up email in my voice -- warm but direct, no 'just checking in,' clear next step."
- 3. You edit + send** -- 5-10 minutes. Out the door within an hour of the call.

The cumulative effect: every prospect gets the same professional follow-up speed and quality. Conversion improves because the lag stops killing momentum.

SECTION 4

The follow-up email pattern

What to include, what to skip

Most sales follow-ups fail by trying to do too much. The successful pattern is short and specific.

The 4-paragraph follow-up:

1. **What I heard.** "You said your team is currently spending X hours per week on Y, and the contract with Z is up in 6 months." Confirms you were listening; gives them something to correct.
2. **What I think the opportunity is.** "Based on what you described, the highest-leverage shift would be [specific change]." Shows you've thought past the conversation.
3. **The proposed next step.** "Two paths: (a) I send a quick proposal with three options at three price points, (b) I jump on a 30-minute call with your operations lead to confirm scope. Which fits better?" Specific. Easy to say yes to.
4. **The close.** "If neither fits, just say so -- I won't chase. Otherwise let me know by [day] and we'll move." Honest. Removes pressure. Sets a soft deadline.

That's the whole email. 4 paragraphs. Under 250 words. Send within 4 hours.

AI generates this structure cleanly when prompted. The voice work is yours. The specifics are yours. The structure is the AI's contribution.

SECTION 5

The live-listening anti-pattern

Why "AI listening to my sales calls" is the wrong move

There's a category of AI tool that listens to your sales calls in real-time, surfaces information during the call, suggests responses. Don't use these for prospect calls. Three reasons:

1. **Trust signal damage.** If the prospect realizes (or even suspects) that AI is listening and prompting you, the trust collapses. You went from "smart professional in conversation" to "salesperson reading off a screen." Hard to recover from.
2. **Divided attention.** Reading AI suggestions while the prospect is talking means you're not actually listening to the prospect. The sales call is the moment where presence is the most valuable thing you bring. AI eats it.
3. **Legal exposure.** Many states require two-party consent for recording. AI listening = recording.

Without disclosure, you're committing a crime in WI and ~11 other states.

The fix: don't do it. Use AI for prep and recap. Be present for the conversation.

What to use instead during the call

- **Real-time note-taking by hand** -- paper or laptop, your own notes, your own attention.
- **A simple post-call recording** (with consent disclosed) that AI processes after -- not during.
- **Your prep doc open in another window** for quick reference between questions -- not for live-coaching.

SECTION 6

The honest limit

Three things AI can't do for sales:

- **Read the prospect.** You're picking up tone, body language, the hesitation before they answer. AI doesn't see any of that. The signal-reading is yours.
- **Build the actual relationship.** AI's "warm and professional" tone is identical across every prospect. Real relationships are built in moments of genuine humanity that AI's average tone irons out. Use AI for structure; bring yourself to the conversation.
- **Decide who to chase.** Not every prospect is worth your time. The judgment about which deals to pursue requires you to balance pipeline, probability, deal size, and gut. AI doesn't have any of those inputs.

Within those limits, AI for sales is one of the highest-ROI workflow improvements available. Better prep, faster recap, more consistent follow-up. The moment itself stays yours.

SECTION 7

When NOT to use AI in sales

- **Active negotiations** -- when the deal is in the back-and-forth phase, AI's averaged-out negotiation advice doesn't match your specific dynamic. Use a human advisor or sales mentor.

- **Long-running enterprise sales** -- when the relationship is multi-month and multi-stakeholder, AI's per-call recaps don't capture the through-line. Keep a manual deal-narrative doc you update yourself.
- **Sales coaching of YOUR style** -- AI can suggest "things to say"; it can't teach you how to BE in the room. Find a real sales coach if that's the skill you need.

SECTION 8

Where to go from here

Three more modules in Tier 2:

- **AI for difficult feedback and reviews** -- performance reviews, hard conversations, asking for feedback yourself.

Get the next module the day it drops: theaiguywi.com/training

If you want this sales workflow installed across a small sales team -- the 15-minute prep discipline, the 4-hour follow-up rule, the recap structure -- that's the consulting offer.

Reach out: alexanderjahn79@icloud.com

Closing -- the lock-in line

The sales win lives in prep and follow-up -- both compressed by AI. The moment itself stays yours, and it should. Live AI listening is the anti-pattern; don't go there. Pre-call structure, post-call recap, fast follow-up. The cumulative effect on conversion compounds across every pipeline you ever run.

4

Four hours

is the follow-up window where the email lands hardest. AI compresses the recap from 45 minutes to 10, so the window is achievable on every call -- not just the ones you remember to write up.

-- Alex

Agent Logic --

Lac, WI. This is module 15 of 18 in Tier 2 (Professional).

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