

/// THE 2027 SALES PLAYBOOK

GROW YOUR SALES **IN 2027**

The practical sales playbook for growing businesses
that are done waiting on referrals.

INSIDE

A 10-minute sales health check, a 2027 sales calculator, a 30-day plan to build your pipeline, a follow-up cadence you can copy, and the US outreach rules that keep you out of trouble.

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HOW TO USE THIS PLAYBOOK

This playbook is for business owners who sell, sales managers and salespeople in growing US businesses. It works for trades and building services, professional services, manufacturing, distribution, logistics, and any business that sells to other businesses.

Do this in order. Take the health check on page 5 first. It takes 10 minutes and tells you exactly which chapters to hit hardest. Then go straight to the 30-day plan on page 13. The worksheets at the back are ready to print and use this week. **Not next quarter. This week.**



You'll see short callouts titled **How Empiraa Signal handles this**. Empiraa Signal is an AI-powered sales system. It puts finding prospects, outreach, follow-up, booking meetings, proposals and your pipeline in one place, for one flat monthly price with unlimited users. Everything in this playbook works with or without software. The callouts just show you how to do it with a lot less admin.

WORKING HARDER ISN'T A SALES **STRATEGY**

If your business grew on referrals, repeat customers and word of mouth, congratulations. That's how most great businesses get started. But here's the problem. Referrals don't show up when you need them. They come in bursts, then they go quiet, and there is no dial you can turn to get more.

Sooner or later every growing business hits the same wall. The owner, or the best salesperson, is too busy delivering the work to go find the next job. Then a slow month shows up and everyone panics.

If that sounds familiar, you don't have a sales problem. You have a system problem.



**YOU DON'T HAVE A
SALES PROBLEM.
YOU HAVE A
SYSTEM PROBLEM.**

WHAT'S CHANGED HEADING INTO 2027

Buyers do their homework before they talk to you. By the time a prospect replies, they've usually already compared you with two or three others. First impressions and fast follow-up decide the deal.

Attention is harder to earn. Generic emails and canned scripts get deleted in seconds. Specific, relevant outreach still works.

Your tools get more expensive every time you hire. Most sales software charges per user, so growing your team means growing your bill.

AI raised the bar. Your competitors can research, write and follow up faster than ever. The ones who use it well are going to eat the ones who don't.

THE FIX IS A SYSTEM, NOT MORE HUSTLE

The businesses that grow sales every year aren't luckier or more talented. They run a simple system, every week, without skipping steps:

1

Know your number.

2

Know exactly who you sell to.

3

Put fresh prospects in front of your team every single day.

4

Follow up without fail.

5

Review the pipeline every week.

This playbook walks you through each one, in order.

SCORE YOURSELF. BE BRUTALLY HONEST.

Nobody's grading this but you, so don't round up. Score each statement:

0 = no, or we don't know

1 = sometimes, or partly

2 = yes, every time

#	STATEMENT	SCORE
1	We know our 2027 sales target, and how many new customers it takes to hit it	
2	We can describe our ideal customer in a few specific lines	
3	New prospects are added to our pipeline every week, not just when things get slow	
4	We respond to every new inquiry within an hour	
5	Every prospect gets at least five follow-up touches before we give up	
6	Our outreach follows CAN-SPAM, TCPA and Do Not Call rules	
7	Every deal has a clear next step and a date	
8	We review the pipeline as a team every week	
9	Our sales tools don't get more expensive every time we hire	
10	Our team spends more time selling than updating systems	
Total (out of 20)		

WHAT YOUR SCORE MEANS

0–8

You're running on luck.

Work shows up, but you can't predict it and you can't control it. Start with chapters 3, 4 and 5: your number, your ideal customer, and the 30-day plan.

9–15

It works, but it leaks.

You have the basics, but slow response, weak follow-up or admin is costing you deals every month. Go hard on chapters 7, 9 and 11.

16–20

You have a system.

Nice work. Use chapters 12, 13 and 14 to cut your costs, put AI to work, and scale what's already winning.

**KEEP YOUR SCORE. YOU'LL
WANT TO **BEAT IT** IN 90 DAYS.**

TURN A REVENUE GOAL INTO A **DAILY NUMBER**

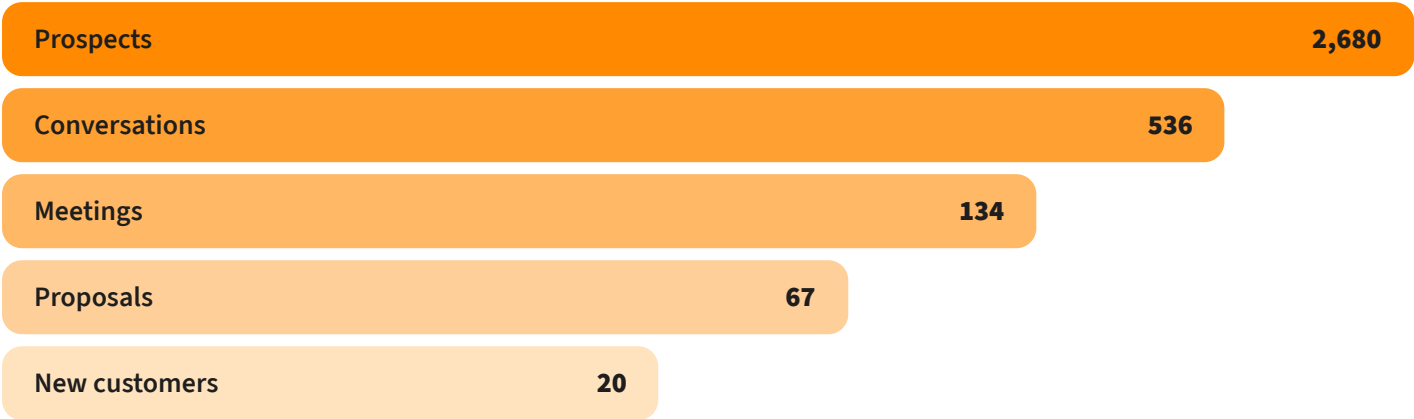
"Grow sales" is not a plan. It's a wish. A plan tells you what to do tomorrow morning. The fastest way to get one is to work backward from the revenue you want, one step at a time.

THE SALES MATH

- 1 **New revenue target.** How much new revenue do you want from new customers in 2027?
- 2 **Average deal value.** What's a typical new customer worth?
- 3 **New customers needed.** Revenue target divided by average deal value.
- 4 **Proposals needed.** New customers divided by your proposal win rate.
- 5 **Meetings needed.** Proposals divided by the share of meetings that turn into a proposal.
- 6 **Conversations needed.** Meetings divided by the share of conversations that turn into a meeting.
- 7 **Prospects needed.** Conversations divided by the share of prospects who actually talk to you.
- 8 **Prospects per day.** Prospects needed divided by your selling days.

WORKED EXAMPLE

A commercial cleaning company in Tampa wants \$300,000 in new revenue in 2027.



STEP	ASSUMPTION	RESULT
New revenue target		\$300,000
Average deal value	\$15,000 a year	
New customers needed	$\$300,000 \div \$15,000$	20
Proposals needed	30% of proposals win	67
Meetings needed	50% of meetings lead to a proposal	134
Conversations needed	25% of conversations lead to a meeting	536
Prospects needed	20% of prospects have a conversation	2,680
Prospects per week	Over 46 selling weeks	58
Prospects per day	Over 5 days	about 12

These rates are examples. Use your own numbers if you have them. If you don't track them yet, start with these and adjust after 90 days.

\$300,000 IS 12 PROSPECTS A DAY.

WHAT THIS TELLS YOU

Twelve new, well-chosen prospects a day. That's it. That's the whole \$300,000. One person can do that in about an hour a day. The catch: it only works if they're the right prospects, and if every single one gets followed up. That's what the rest of this playbook is for.

THE RIGHT 12 PROSPECTS BEAT THE **WRONG 100**

Most businesses don't have a lead problem. They have a targeting problem. They burn hours chasing companies that were never going to buy. Your ideal customer profile, or ICP, is a short description of the customers you win most often and who are most worth winning. **If you can't write it down, your team can't find them.**

WRITE YOUR ICP IN SIX LINES

LINE	WHAT TO WRITE	EXAMPLE: COMMERCIAL CLEANING, FLORIDA
Industry	The industries you sell to	Property management, senior living, daycare and early learning centers, private schools, medical offices
Location	Where they are	Tampa Bay and Orlando
Size	Employees or revenue	20 to 500 employees, or 20,000 square feet or more of floor space
Include	What makes them a great fit	Multiple locations, already outsourcing cleaning, inspection-heavy environments
Exclude	Who to avoid	One-person offices, government bids, companies with in-house cleaning crews
Titles	Who makes or influences the decision	Facilities manager, operations manager, practice manager, general manager

YOUR ICP IS ALREADY IN YOUR CUSTOMER LIST

List your 10 best customers from the last two years. For each one, write down:

the industry, size and location

who signed off on the deal

how you found them

why they picked you

how profitable they are

The patterns that repeat are your ICP. The customers who were a nightmare, or who didn't make you money, tell you who to exclude.

WATCH FOR BUYING TRIGGERS

Some moments make a company much more likely to buy. For example:

a new location, or a move

a new manager in the decision-making seat

a contract coming up for renewal

a hiring spree

a new regulation or inspection standard

Reach out when a trigger happens and your message is relevant from the first line.



HOW EMPIRAA SIGNAL HANDLES THIS

Describe your ideal customer in Signal using these same six lines. Signal analyzes your ICP and learns from the deals you win, so it finds companies that are more likely to convert. The more you close, the sharper the prospects get.

IF YOUR ICP FITS EVERYONE, IT FITS **NO ONE**

Run your six lines through this test before you move on. Every "no" means the line needs to get more specific.

YES

NO

Could a new hire find 20 of these companies in an hour, just from these six lines?

☐☐

Does the Exclude line actually rule out a real group you've wasted time on?

☐☐

Could you name the job title you'd call first at each company?

☐☐

Would your best customer from last year match every line?

☐☐

FIVE A DAY. TWENTY SELLING DAYS. **A HUNDRED** NEW PROSPECTS.

This is the chapter to act on first. Follow it for 30 days and you'll have up to 100 new prospects in your pipeline, every one of them researched, contacted and in a follow-up cadence.

FIRST, WHAT COUNTS

A prospect is not a name on a spreadsheet. For this plan, it's a named decision maker, at a company that matches your ICP, with a working email or phone number, who is in your follow-up cadence. If it doesn't tick all four boxes, it doesn't count.



Named decision maker



Matches your ICP



Working email or phone

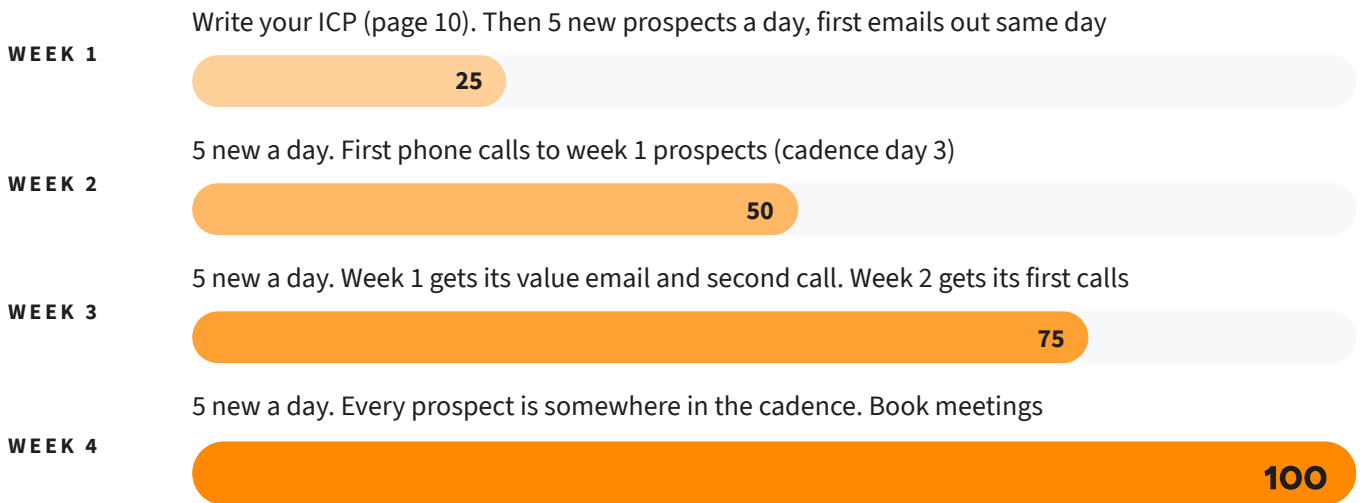


In your cadence

THE DAILY ROUTINE: 45 MINUTES

- 1 Find 5 new prospects** that match your ICP. **15 min**
- 2 Research each one** for about 3 minutes: what they do, who decides, anything recent. **15 min**
- 3 Send each one a first email** using the four-part structure on page 17. **10 min**
- 4 Work the follow-ups due today** from the 14-day cadence on page 23. This grows each week. **5 min to start**

THE 30-DAY PLAN



WHAT 100 PROSPECTS CAN GET YOU

Let's be straight with you. 100 prospects is not 100 customers. Using the example rates on page 8, 100 well-chosen prospects works out to about 20 real conversations and about 5 meetings. Your own rates will differ. That's 5 meetings you didn't have last month, from 45 minutes a day. Keep going for 90 days and, at the same rates, it's 300 prospects and around 15 meetings.

THE RULES

Never skip a day.

Five a day is easy. Twenty-five on a Friday is not happening.

Quality over quantity.

A bad-fit prospect doesn't count toward the 100.

Log everything.

You can't follow up on what you didn't write down.



HOW EMPIRAA SIGNAL HANDLES THIS

Signal can deliver up to 10 fresh prospects that match your ICP every morning, already researched, with company context, decision makers and buying signals. That covers your 5 a day twice over, and takes the 30 minutes of finding and researching down to a few minutes of reviewing. Every prospect drops straight into your pipeline and your follow-up sequence.

THE DAY YOU STOP PROSPECTING IS THE DAY NEXT QUARTER **DIES**

The number one reason pipelines run dry is painfully simple. Prospecting only happens when things are slow. By then it's too late. A new prospect today becomes a customer in weeks or months, not tomorrow.

THE RULE: PROSPECT EVERY DAY

Treat prospecting like payroll. It happens, no matter what. Block it in the calendar, protect it, and add new prospects every working day. Small, steady numbers beat big bursts every time.

WHY BOUGHT LISTS AND OLD SPREADSHEETS FAIL

They go stale fast. People change jobs, companies move, emails bounce.

They're generic. Nobody picked those companies for your business.

They can get you in legal trouble. Harvested email lists can put you on the wrong side of CAN-SPAM (see page 19).

They give you one burst, then another dry spell.

KNOW WHO YOU'RE TALKING TO BEFORE YOU REACH OUT

For every prospect, get enough context to make your first message relevant:

- what the company does, its size and its locations
- who the decision maker is, and their role
- anything recent: news, hiring, new locations, awards
- how you could genuinely help them

Three minutes of research turns a cold message into a relevant one.

PRIORITIZE. DON'T JUST COLLECT.

Not every prospect deserves the same effort. Rank them by how closely they match your ICP and whether there's a buying trigger. Your best-fit prospects get the most personal outreach, and a phone call.



HOW EMPIRAA SIGNAL HANDLES THIS

Signal delivers up to 10 fresh prospects that match your ICP every morning, with no bought lists and no hours lost scrolling LinkedIn. Every prospect comes enriched with company context, decision makers and buying signals, so you know who to call first and what to say. The entry plan adds up to 2,000 fresh prospects a month on top of that.

NOBODY CARES ABOUT YOUR COMPANY. MAKE IT ABOUT **THEM.**

Outreach that works in 2027 is short, specific and obviously about the other person's business. It doesn't need to be clever. It needs to prove you did your homework and that you can help.

THE FOUR-PART FIRST EMAIL

1 A relevant opener. Something specific to them. Never "I hope this email finds you well."

2 The problem you solve. In their world, in one or two sentences.

3 Proof. A short example of a similar business you've helped.

4 One simple ask. One easy next step.

EXAMPLE • SUBJECT: CLEANING ACROSS YOUR THREE BRANDON CENTERS

Hi Sarah,

Saw that Little Explorers opened its third center in Brandon last month. Congrats.

Most daycare operators we talk to find cleaning standards slip once they're running more than one location, especially with licensing inspections to prepare for.

We clean eight early learning centers across Hillsborough County and help their directors stay inspection-ready without chasing contractors.

Worth a 15-minute call next week to see if we could help across your centers?

James Carter
Owner, BrightClean Commercial
(813) 555-0142 | brightcleanfl.com

BrightClean Commercial, 100 Harbor Street, Tampa, FL 33602

Not interested? Reply "no thanks" and I won't contact you again.

Business names, numbers and addresses in this example are fictional.

! Notice the last two lines. The physical address and the opt-out aren't there to be polite. **US law requires them.** More on page 19.

PICK UP THE **PHONE**

Email opens the door. The phone walks through it. A short, polite call to a well-researched prospect, right after your email, is one of the highest-return things a growing business can do. Most of your competitors won't make the call. That's your edge.

THE 30-SECOND CALL OPENER

"Hi Sarah, it's James from BrightClean. I sent you a note last week about cleaning across your Brandon centers. Did I catch you at a bad time?"

If she has a minute, tell her in one sentence why you called and ask one question about how they handle it today. If she's busy, ask when's better, and call exactly then.

LINKEDIN

Connect with decision makers before or after your first email. Comment on their posts when you actually have something to add. Keep DMs short and relevant, and never paste a sales pitch into a connection request.

General information only, not legal advice. Rules change. Check current requirements with the FTC ([ftc.gov](https://www.ftc.gov)), the FCC ([fcc.gov](https://www.fcc.gov)) and your attorney.

THE RULES ARE SIMPLE. THE FINES ARE **NOT.**

One text message sent the wrong way can cost you \$500 to \$1,500. Per text. Multiply that by a list of a few thousand and you can see why class action lawyers love sales teams that skip this page. Don't skip this page.

EMAIL: THE CAN-SPAM ACT

The good news: US law doesn't require permission before you send a business a commercial email. The catch: every email has to follow the rules, and each email that breaks them can cost more than \$50,000.

- 1 Don't mislead.** Your "From" name, reply address and subject line must be accurate and honest.
- 2 Identify yourself.** Make it clear who you are and that it's a commercial message.
- 3 Include a physical address.** A valid postal address for your business, in every email.
- 4 Give a clear way out.** Every email needs a working opt-out. Honor it within 10 business days, and never email that address again.
- 5 Own it.** If you hire someone to send your email, you're still responsible.

Don't use harvested lists. Using software that scrapes email addresses off websites, or generating addresses by guessing, makes a violation worse, not better.

CALLS AND TEXTS: THE TCPA AND THE DO NOT CALL REGISTRY

Texts count as calls. Everything here applies to SMS.

Automated calls and texts need written consent. If you use an autodialer, prerecorded voice or automated texting to reach a cell phone for marketing, you need the person's prior express written consent. Manually dialed calls from a real person are a different story, but the Do Not Call rules below still apply.

The National Do Not Call Registry. Business phone lines can't be registered, but plenty of owners use one cell phone for everything, and cell phones are treated as residential. If you call cell numbers, scrub your list against the registry first.

The inquiry exception. If someone asks you to contact them (downloads your guide, fills out your form), you generally have an established business relationship for 3 months, even if they're on the registry. A purchase gives you 18 months. The moment they say stop, you stop.

Calling hours. Federal rules allow 8am to 9pm in the recipient's local time.

On every call: your caller ID must display, you must say who you are and why you're calling, and you must honor any request to stop calling.

IF YOU SELL IN FLORIDA

Florida has its own law, the Florida Telephone Solicitation Act, and it's stricter than the federal one.

Calls are limited to **8am to 8pm** local time.

No more than 3 calls to the same person in 24 hours on the same subject.

Florida keeps its **own Do Not Call list**, separate from the national one. Scrub against both.

Automated calls and texts need prior express written consent, and people can sue.

IF YOU SELL IN GEORGIA

Georgia's state list was merged into the National Do Not Call Registry, so the national scrub covers it.

Georgia adds its own penalties of up to \$5,000 per violation on top of federal penalties, and consumers can sue.

The simple rule: if you call in Florida or Georgia, call between 8am and 8pm their time, no more than 3 times in a day, and scrub both lists. That keeps you on the right side of every rule on this page.

YOUR COMPLIANCE CHECKLIST

- ☐ Every email address came from a public source and is relevant to the person's role
- ☐ Every email has an honest subject line, our business name and our postal address
- ☐ Every email has a working opt-out, honored within 10 business days
- ☐ Our opt-out list is checked before every send
- ☐ Cell numbers are scrubbed against the National Do Not Call Registry (and Florida's list, if we call Florida)
- ☐ We have written consent before using any autodialer or automated texts
- ☐ Calls happen between 8am and 8pm in the prospect's time zone
- ☐ No more than 3 calls to the same person in 24 hours
- ☐ Our caller ID shows on every call



HOW EMPIRAA SIGNAL HANDLES THIS

Signal keeps every prospect, email and call in one place, so you have a clean record of who you contacted, when, and how. When someone says stop, you'll know.

MOST DEALS AREN'T LOST. THEY'RE **ABANDONED.**

Hardly anyone replies to the first message. That's not a no. It's timing, a busy inbox, a bad week. The businesses that win are almost always the ones that keep showing up, politely, with something useful to say.

SPEED BEATS ALMOST EVERYTHING

When someone inquires, how fast you respond changes everything. A Harvard Business Review study of more than 2,000 companies found that businesses that contacted an online lead within an hour were nearly seven times as likely to qualify it as those that waited even an hour longer. They were more than 60 times as likely to qualify it as companies that waited 24 hours or more.

Source: Oldroyd, McElheran and Elkington, "The Short Life of Online Sales Leads", Harvard Business Review, March 2011.



**MORE LIKELY TO QUALIFY THE
LEAD. JUST BY CALLING BACK
WITHIN AN HOUR.**

Read that again. Sixty times. If your team calls back tomorrow, you're not following up. You're sending a thank-you gift to your competitor.

Set the rule: every inbound inquiry gets a response within an hour during business hours. No exceptions.

COPY IT. RUN IT.

BOOK MEETINGS.

DAY	CHANNEL	WHAT TO DO
1	Email	The four-part first email from page 17
2	LinkedIn	Connect. No pitch
3	Phone	Call. No answer? Leave a 20-second voicemail that mentions your email
5	Email	Send something useful: a relevant example, a tip, or a short case study
8	Phone	Call again, at a different time of day
10	Email	A new angle. A different problem you solve
14	Email	The close: "I don't want to clog up your inbox. Should I close your file for now?"

That last email is the one people answer. Nobody likes a door closing on them.

THE RULES OF GOOD FOLLOW-UP

Bring something new every time. Never send "just following up." Ever.

Switch channels. Mix email, phone and LinkedIn.

Switch the time. Try early morning, lunch and late afternoon.

Stop when they say stop. Immediately. It protects your reputation, and it's the law.

Come back later. A "not right now" goes on a reminder for three to six months.



HOW EMPIRAA SIGNAL HANDLES THIS

Build this cadence as an automated email sequence in Signal, so every email goes out on schedule without anyone having to remember. Every prospect has a clear next step, so the calls happen when they should. Nothing depends on memory.

FROM FIRST REPLY TO **SIGNED PROPOSAL**

BOOK THE MEETING WITHOUT THE BACK-AND-FORTH

When a prospect says yes to a call, make booking stupidly easy. Send a link where they pick a time that works for them, instead of three days of "does Tuesday work?" Every extra step loses you people.

RUN A 15-MINUTE DISCOVERY CALL

The first call isn't a pitch. It's to find out whether you can help, and what a win looks like for them.

MINUTES	FOCUS	EXAMPLE QUESTIONS
0 to 2	Set the agenda	"I'd love to hear how things work today, tell you a bit about us, and see if there's a fit. Sound good?"
2 to 8	Their situation	"How do you handle this today? What's working? What's driving you crazy?"
8 to 11	The impact	"What happens if this doesn't change? Who else does it affect?"
11 to 13	How you help	A short, specific explanation, tied to what they just told you
13 to 15	Next step	"Would it help if I put together a proposal? Who else should see it?"

PROPOSALS THAT CLOSE

A good proposal is short, clear and about the customer. Include:

1 Their situation, in their own words from the discovery call.

2 The outcome they want.

3 What you'll do, clearly scoped.

4 The investment, with simple options where you can.

5 Proof, like a relevant example or testimonial.

6 Next steps, with a clear way to say yes.

48H

FOLLOW UP EVERY PROPOSAL WITHIN 48 HOURS

Book the proposal review call before you send the proposal. Walking through it together wins far more often than emailing a PDF and praying.



HOW EMPIRAA SIGNAL HANDLES THIS

Signal has a built-in **scheduler**, so prospects book straight from your link and the meeting lands in your pipeline. You can **call** prospects and create and send **proposals** from the same system, with no jumping between a booking tool, proposal software and your CRM.

A PIPELINE FULL OF MAYBES FEELS GREAT. IT'S ALSO **FICTION.**

A pipeline stuffed with deals that will never close feels good, and it hides the truth. A useful pipeline tells you exactly what's real, what's stuck, and what needs your attention this week.

DEFINE STAGES BY WHAT THE BUYER DID, NOT WHAT YOU HOPE

STAGE	THE DEAL MOVES HERE WHEN...
● New prospect	They match your ICP and are ready to contact
● In conversation	They've replied, or you've spoken
● Meeting booked	A discovery call is on the calendar
● Proposal sent	They asked for a proposal, and you sent it
● Negotiating	They're discussing terms, scope or price
● Won or lost	They signed, or they said no

FIVE PIPELINE RULES

- 1 Every deal has a next step and a date.** No next step, no deal.
- 2 Stale deals get a decision.** Nothing moved in 30 days? Close it or give it a clear action.
- 3 Record why you lost.** Lost reasons show you what to fix.
- 4 One source of truth.** The pipeline lives in one system, not in spreadsheets and inboxes.
- 5 Update as you go,** not on Friday afternoon from memory.

THE 30-MINUTE WEEKLY PIPELINE REVIEW

5 min The numbers: prospects added, conversations, meetings, proposals, wins

10 min Deals closing in the next 30 days: what does each one need to get over the line?

10 min Stuck deals: move them forward or close them out

5 min This week's priorities and prospecting targets

3X

PIPELINE COVERAGE

Aim for open pipeline worth about three times your sales target for the period. If you win about one in three proposals, 3x coverage keeps you on track.



HOW EMPIRAA SIGNAL HANDLES THIS

Signal shows every deal with a clear next step, so reps always know what to do next. The AI built into Signal flags deals at risk before they slip and shows your team where to focus. That assistant is called ANI. Reporting is built in, so prepping the weekly review takes minutes.

WHAT ARE YOUR SALES TOOLS REALLY COSTING YOU?

Most growing businesses build their sales stack one problem at a time. A CRM. Then a scheduling tool. A proposal tool. A data provider. An email tool. A calling app. Each one made sense at the time. Together, they cost way more than most owners realize, and they don't talk to each other.

THE PER-USER PROBLEM

Most sales tools charge per user, per month. That means your costs go up every time you hire a salesperson, add an admin or give a manager access. The tools that are supposed to help you grow end up charging you for growing.

RUN THIS AUDIT IN 20 MINUTES

TOOL	WHAT IT DOES	MONTHLY COST	PRICED PER USER?	USERS	COST IF WE ADD 3 PEOPLE
	CRM or pipeline				
	Prospect data				
	Email sequences				
	Meeting scheduling				
	Proposals				
	Calling				
	Other				
Total					

NOW ADD THE HIDDEN COSTS

Admin time.

Hours spent copying data between tools.

Lost deals.

Prospects who fell through the cracks between systems.

Setup and training.

Every new hire learning five tools instead of one.

Access decisions.

Team members locked out of the system because another license costs too much.

FOUR QUESTIONS TO ASK BEFORE YOUR NEXT RENEWAL

- 1 Can one system replace three or more of these tools?
- 2 Will the price go up when we hire?
- 3 Who moves our existing data if we switch?
- 4 Can we try it with our own prospects before we commit?



HOW EMPIRAA SIGNAL HANDLES THIS

Signal replaces your CRM, prospect data, email sequences, scheduler, proposals and calling with one sales system, at one flat monthly price with **unlimited users** on every plan. Plans start at \$99 a month, with a 14-day free trial and no credit card required. Moving from another CRM? The Signal team migrates your companies, contacts and deals for you.

LET AI DO THE ADMIN. KEEP THE HUMAN PARTS **HUMAN.**

AI can save a growing sales team hours every week. Used badly, it floods inboxes with bland messages that get ignored and wrecks your reputation. The trick is using it for the right jobs.

WHERE AI HELPS SALES TEAMS RIGHT NOW

Research.

Summarizing what a company does, its recent news and likely challenges, before you call.

Prioritizing.

Scoring which prospects and deals deserve attention first.

First drafts.

Drafting emails and proposals for you to edit and personalize.

Next steps.

Suggesting who to contact, what to say and when to follow up.

Deal risk.

Spotting deals that have gone quiet or look likely to slip.

Summaries.

Turning calls and meetings into notes and action items.

WHERE A HUMAN STAYS IN CHARGE

The final message. Always read it, edit it, and add something genuinely personal before it goes out.

Relationships. Calls, meetings and negotiations are where trust gets built.

Judgment. AI suggests. You decide which deals to chase and what to offer.

Compliance. AI doesn't change the rules on page 19. Every message is still on you.

THE AUTHENTICITY TEST

Before you send any AI-assisted message, ask yourself: would I be comfortable if the prospect knew exactly how this was written? Would they feel it was written for them? If not, rewrite it.



HOW EMPIRAA SIGNAL HANDLES THIS

Signal has AI built in, not bolted on. It's called **ANI**, Empiraa's AI assistant. A daily brief shows your team where to focus each morning. ANI scores leads, flags deals at risk and recommends the next action that moves each deal forward. Because it works from your own pipeline, prospect activity and deal history, its suggestions are about your business, not generic sales advice. ANI is included in Signal and isn't sold separately.

CONSISTENCY BEATS **HEROICS**

A simple weekly rhythm, run every week, will grow your sales more than any heroic end-of-quarter push.

IF YOU'RE AN OWNER WHO ALSO SELLS

WHEN	WHAT	TIME
Every morning	Prospecting block: your 5 new prospects for the day (page 13)	45 minutes
Every morning	Follow-ups due today: calls and emails	15 to 30 minutes
Within 1 hour	Respond to every new inquiry	As needed
Monday	Weekly pipeline review (page 27)	30 minutes
Friday	Check the week's numbers against your daily target	10 minutes
Monthly	Review win rate, lost reasons and your ICP	1 hour

IF YOU HAVE A SALES TEAM

WHEN	WHAT	WHO
Daily	Protected prospecting and follow-up blocks	Every salesperson
Daily	10-minute stand-up: yesterday's activity, today's focus, blockers	The team
Weekly	Pipeline review, with coaching on stuck deals	Manager and each salesperson
Weekly	Team numbers against target	Manager
Monthly	Win and loss review. Refresh the ICP and messaging	The team
Quarterly	Check progress against the 2027 target and adjust activity	Owner and manager

PROTECT THE PROSPECTING BLOCK LIKE IT'S A CUSTOMER MEETING

Put it in the calendar as a recurring appointment. Don't move it for internal stuff. The day it gets skipped is the day next quarter's pipeline starts to shrink.

TRACK ACTIVITY AND RESULTS

Activity:

prospects added, conversations, meetings booked.

Results:

proposals, wins and revenue.

Activity is what you control. Results tell you whether you're doing the right activity.

MY 2027 SALES CALCULATOR

STEP	YOUR NUMBER
New revenue target for 2027	\$
Average deal value	\$
New customers needed (target ÷ deal value)	
Proposal win rate	%
Proposals needed	
Meeting to proposal rate	%
Meetings needed	
Conversation to meeting rate	%
Conversations needed	
Prospect to conversation rate	%
Prospects needed	
Selling weeks in the year	
Prospects needed per day	

MY IDEAL CUSTOMER PROFILE

LINE	OUR IDEAL CUSTOMER
Industry	
Location	
Size	
Include	
Exclude	
Titles	

OUR TOP THREE BUYING TRIGGERS

- 1
- 2
- 3

MY 30-DAY TRACKER: 100 PROSPECTS

WEEK	TARGET	ACTUAL
Week 1	25	
Week 2	50	
Week 3	75	
Week 4	100	

MY FIRST EMAIL

Subject:

1. Relevant opener (specific to them):

2. The problem we solve (in their world):

3. Proof (a similar business we've helped):

4. One simple ask:

Sign-off, business name, postal address and opt-out line:

MY 30-SECOND CALL OPENER

"Hi [name], it's [your name] from [business]. I [sent you a note / noticed]
_____. Did I catch you at a bad time?"

Why I'm calling (one sentence): _____

My one question: _____

MY 14-DAY FOLLOW-UP CADENCE

DAY	CHANNEL	MESSAGE OR ANGLE
1	Email	
2	LinkedIn	
3	Phone	
5	Email	
8	Phone	
10	Email	
14	Email	

ONE SALES SYSTEM. EVERY USER INCLUDED.

Empiraa Signal puts everything your team needs to find, win and manage customers in one place, so you spend less time on admin and more time selling.

Good afternoon, AB

Your ANI command centre - everything you need to win today

My Focus 25 overdue

Pipeline (annualised)

A\$126,361

CALL OVERDUE Outreach call: Stephen Dodds  Stephen Dodds 🕒 8:00 PM 4266h ago View Mark done	CALL OVERDUE Outreach call: Noj Mather  Noj Mather 🕒 8:00 PM 4266h ago Call now Mark done	CALL OVERDUE Follow-up call re: Coles OHS 🕒 8:00 PM 4266h ago View Mark done	CALL OVERDUE Follow-up call re: Everline CRM Deal 🕒 8:00 PM 4266h ago View Mark done	CALL OVERDUE Follow-up call re: Ev 🕒 8:00 PM View Mark done
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FIND

Describe your ideal customer, and Signal delivers up to 10 fresh prospects that match it every morning. Every prospect comes enriched with company context, decision makers and buying signals. Signal learns from the deals you win, so the prospects keep getting better.

REACH

Send personalized email sequences that follow up automatically. Every prospect has a clear next step, so calls and follow-ups don't slip.

WIN

Prospects book meetings straight from your scheduler link. Call prospects and send proposals from the same system.

MANAGE

See every deal with a clear next step. The AI built into Signal delivers a daily brief, scores leads, flags deals at risk and recommends what to do next. Reporting is built in.

BUILT FOR GROWING BUSINESSES

Unlimited users on every plan. Your costs don't go up when you hire.

Up to 2,000 fresh prospects a month on the entry plan.

Migration done for you: moving from another CRM? We move your companies, contacts and deals.

One flat monthly price, from \$99 a month.

Replaces multiple tools: your CRM, prospect data, sequences, scheduler, proposals and calling.

14-day free trial, no credit card required.

NEXT STEP

YOU HAVE THE PLAN. NOW GET THE **LEADS.**

You just read the whole system. The only thing standing between you and a fuller pipeline is whether you start this week or keep waiting on referrals.

Try Empiraa Signal free for 14 days, no credit card required. Describe your ideal customer, and start getting fresh prospects that match it every morning.

Keep every prospect your trial finds. Even if you decide Signal isn't for you, the prospects your trial delivers are yours to keep. You literally can't lose.

Start your free trial

Book a 15 minute demo



Scan to start your
trial

Want help setting it up? Book a free 15-minute call and we'll build your ideal customer profile and your first prospect list with you.

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This playbook contains general information only and is not legal or financial advice. Check current requirements with the FTC, the FCC, your state, or your attorney.



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