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I Asked My Community About AI in Sales

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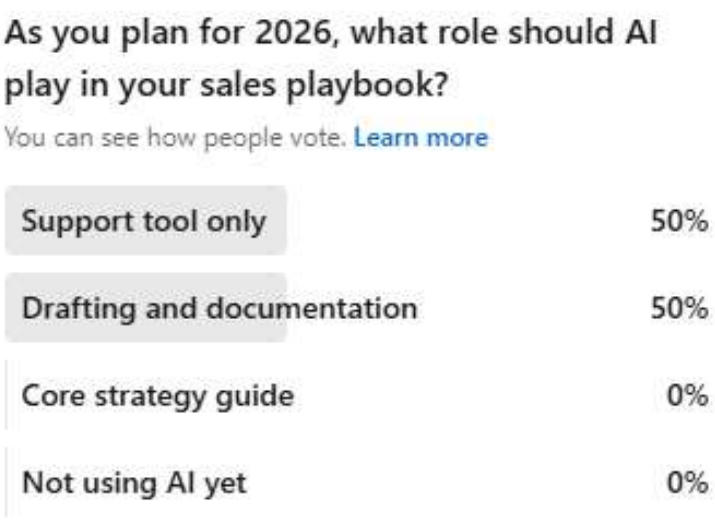
January 6, 2026

The Split Says Everything About Where We're Headed

Right before the holidays, I posted a poll about how companies might use or not use AI in the creation of a sales playbook.

If you missed the poll, don't sweat it. It was a very straightforward - would you use it as a support tool, to draft and document, do the whole the thing, or skip AI altogether.

I'll be honest; I expected everyone to go for option three. It seems to me that more and more companies are so blinded by Shiny New Object Syndrome that they run to make AI do more and be more than it actually is. But the answers surprised me:



screenshot by author

No one touched that third option, which tells me a lot about where sales teams are headed in 2026. Plus, both choices are right, but in completely different ways. Let's get into it.

AI as a Support Tool

When you think of your AI as a support tool, you have to understand how it supports you, particularly in improving your sales process.

When it comes to hard numbers or paperwork, you can use it to fill in some important gaps:

- Pattern recognition across data
- Summaries of call notes, CRM activity, or deal stages
- Spot trends or shifts in the market
- Support your process once it's up and running and things start to repeat

When it comes to positioning, AI learns from you, not the other way around. This is why it's so important to remember that AI doesn't replace people. It works best when everyone has it available for a kind of virtual assistant.

For instance, once your strategy is clear, you can train your AI in each step and tell it how it can support you daily, weekly, etc.

AI loves to focus on execution, but stumbles when you ask it to show you a new direction to take. Tell it what role to assume, your goals, and how you want it to get there. Then watch it fly.

Without these solid foundations, AI will go rogue and create chaos within your organization.

AI, Drafting and Documentation

I completely understand why half of my respondents chose this option. I feel like documentation is the real strength of AI, not creation. And I feel

like most of the world is catching onto the fact that AI can take great notes but writes crap sales pitches.

Here are some ways you can optimize your documentation process with a bot:

- AI can take dictation in meetings, then structure each conversation into to-do lists, documents, and records.
- It speeds up first drafts of playbooks, scripts, and onboarding materials
- Plus, it can document everything as decisions are made for future reference

I want to make an important distinction here. Drafting is NOT the same as designing. That's like thinking you're James Joyce just because you know how to spell.

Just like writing a generation-defining epic and typing are two different skills, so are decision-making and documenting.

Remember, all AI can do is reflect what you give it. Keep in mind that AI's design is meant to keep you interacting with its interface, so it will always back you up, even if you're making bad decisions or drawing the wrong conclusions. That's why human leadership and guidance is essential.

The Gap AI Cannot Close

We're living in both an exciting and terribly boring time when it comes to new technology.

Yes, AI is responsible for the enshitification of the internet, but it can do amazing things. However, it's not a brain, and we shouldn't treat it like one. So, just to recap:

- AI doesn't understand team dynamics
- It can't recognize strengths, weaknesses, or motivation from person to person
- It won't adjust messaging based on live buyer behavior
- It has no idea what's already failed inside your business
- It will NEVER challenge assumptions or push back when leaders are wrong

Remember, AI is NOT designed to think critically, but to encourage you. Even when it shouldn't.

To avoid these pitfalls, you need the thinking skills that only live in the human brain. Sales is human behavior under immense pressure, which is why great experience and understanding is essential. Otherwise, yours will fall apart once it's put to to the test.

Context beats content 100 percent of the time.

Here's what I do

I use a combination of each team's data, their experience, and my judgement to draw on their strengths to create a repeatable process they can use time and again.

To do that, I have to ask the uncomfortable questions. I have to leave the templates behind and take in each person's reality, personality, and their shortcomings. Plus, I need to understand your customer inside and out, their concerns, desires, you name it.

Everything I do is highly customized, so while I do get nervous when companies execute massive layoffs in the name of replacing humans with bots, I chuckle a bit to myself when they then have to hire most of them back once they see what a huge mistake they've made.

The better approach is to find professionals who can work with your leadership team, observe your reps in real sales pitches, and then co-create a sales playbook that reflects your reality. Sure, AI helps, but it doesn't replace anyone. And I was very happy to see that realization in my latest poll.

The Takeaway for Q1, 2026

Remember:

- AI is a powerful assistant
- but it is not a sales leader
- The best teams will combine smart tools with experienced guidance

Want to see what smart tech and smarter people can do together? Contact me directly right here on LinkedIn and let's chat. I'd love to hear more about your business and how I can make your sales process smoother, more predictable, and better for you this year.

Be sure to subscribe to The Fractional Advantage for more great insights like this one every two weeks. And Happy New Year!

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