

AI for small sales teams: a one-page quick-start

Automate the first reply to demo requests first. If you only have 15 minutes, build the demo form.

Where to start, in order

1. **Prompt Writing 101:** the four-part structure behind every agent instruction.
2. **AI Demo Request Form:** an n8n agent rates each lead Hot, Warm or Nurture, logs it and emails one next step.
3. **AI Deal Follow-Up Agent:** drafts a stage-matched follow-up for each open deal into a sheet.
4. **Summarize a Meeting Transcript:** a discovery call becomes decisions, owners and a recap email.
5. **Reply Faster: Customer Emails:** for the prospect email that needs a careful, checked answer.

A prompt to copy: rate your leads

Role: You are a sales assistant for [COMPANY], rating new leads using our rules.
Context: We sell [WHAT WE SELL]. Our rules: [RATING RULES]. Next step for each rating: [NEXT STEPS]. Rate only from what the lead wrote. If a detail the rules need is missing, say so and rate on what's there; don't assume.
Task: Rate each lead below Hot, Warm or Nurture.
Format: A table with the columns Name, Rating, Reason (quote the words from the lead that decided it), Missing info and Next step. One row per lead.

Write rules as plain sentences with real thresholds, like "Hot: 5 or more staff and wants to switch within a month."

Promises stay with people

- **Pricing and discounts:** put "never offer a discount" in every system message.
- **No made-up features or results.** When it doesn't know, it says a rep will follow up.
- **No dates you can't keep.** Demo times, trial extensions and start dates come from a person.
- **Read the first replies.** The demo form agent sends on its own. Test it with your own address.

Remember: Every sales prompt and agent forbids invented prices, discounts, features and dates. A rep reads and sends the follow-ups.

Practice it free: Build an AI Demo Request Form That Qualifies Leads at learn.ynteractive.com/modules/lovable-n8n-sales. This sheet: learn.ynteractive.com/content/cheat-sheets/ai-quick-start-sales. Northwind Scheduling Software is a made-up business from the lesson. By Robert Breen, October 1, 2026.