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DIGITAL, SOCIAL, CRM, AND AI-ASSISTED SELLING TRAINING IN THE PHILIPPINES

A 1-Day Practical Sales Training Program on Digital Customer Engagement, Social Selling, CRM-Powered Pipeline Management, Personalized Outreach, and Responsible AI-Assisted Sales Execution

TRAINING OVERVIEW

Customers increasingly research companies, compare alternatives, examine online reviews, engage through social platforms, communicate through digital channels, and expect faster and more relevant responses before agreeing to a formal sales conversation.

Sales professionals can no longer depend solely on face-to-face meetings, telephone calls, printed materials, personal networks, or traditional product presentations.


Modern sellers must know how to use digital channels strategically, build professional credibility online, identify and engage prospective customers through social platforms, manage customer information through a Customer Relationship Management system, and use artificial intelligence responsibly to improve research, communication, preparation, follow-through, and productivity.

This 1-day **Digital Selling Training in the Philippines** is designed for sales executives, account managers, business development professionals, relationship managers, entrepreneurs, technical sellers, solutions consultants, customer success personnel, sales leaders, and other employees responsible for developing customer relationships and sales opportunities through digital channels.

Many organizations invest in websites, social media, CRM platforms, online communication tools, automation systems, and artificial intelligence applications but still experience challenges such as:

- Salespeople using digital platforms without a clear selling strategy
- Incomplete or unprofessional online profiles
- Random posting without a defined target audience
- Generic direct messages and prospecting emails
- Excessive product promotion instead of value-adding engagement
- Weak coordination between social activity and the formal sales process
- Collecting many online connections but generating few meaningful conversations
- Inconsistent recording of customer information and follow-up activities
- CRM systems being treated as administrative reporting tools
- Duplicate, outdated, incomplete, or inaccurate customer records
- Opportunities remaining in the pipeline without clear next steps
- Salespeople keeping important customer information in personal notes or inboxes
- Overreliance on automated messages



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- Using artificial intelligence without checking accuracy
- Uploading confidential or personal customer information into unapproved tools
- Producing AI-generated messages that sound generic, exaggerated, or impersonal
- Replacing seller judgment and relationship-building with technology
- Measuring digital activity without connecting it to qualified opportunities and revenue

This practical **Selling Digitally Training in the Philippines** helps participants understand how digital tools should support—not replace—the fundamentals of effective selling.

The program also develops practical **Social Selling in the Philippines** by helping participants establish professional credibility, research prospective customers, engage with relevant content, build trusted relationships, and initiate customer-centered conversations through appropriate social platforms.

For organizations seeking **CRM Selling Training in the Philippines** or **Selling Using CRM Training in the Philippines**, the program teaches participants how to use a CRM as a working sales-management system for organizing customer data, tracking interactions, qualifying leads, managing opportunities, scheduling follow-ups, maintaining pipeline discipline, and coordinating customer relationships.

The **AI-Assisted Selling Training in the Philippines** component shows participants how artificial intelligence may support:

- Prospect and account research
- Customer and industry briefing
- Call and meeting preparation
- Discovery-question development
- Personalized outreach drafting
- Sales email improvement
- Social content development
- Value-proposition refinement
- Proposal and presentation preparation
- Meeting summaries
- Follow-up communication
- Objection-handling practice
- Opportunity analysis
- Sales coaching and role-play preparation

Participants are also taught that AI-generated outputs must be reviewed, verified, customized, and approved by a responsible human seller.

Using the MSS EnterTRAINment approach, the program combines concise discussions, digital-selling assessments, profile and content challenges, social-selling simulations, prospect-research exercises, CRM pipeline activities, AI prompting laboratories, ethical decision scenarios, integrated sales-workflow simulations, and personal action planning.

TRAINING GOAL

To equip participants with an integrated and responsible digital selling system that enables them to build professional online credibility, engage prospective customers through relevant digital and social channels, use CRM information to manage relationships and opportunities, apply artificial intelligence to improve sales productivity, and convert technology-enabled activity into meaningful customer conversations and sustainable sales results.

TRAINING OBJECTIVES

By the end of the program, participants will be able to:

1. Explain how digital selling differs from traditional, social, CRM-based, and AI-assisted selling
2. Identify where digital tools can support the customer journey and sales process
3. Select appropriate digital channels based on customer profiles, buying behavior, and sales objectives
4. Strengthen their professional online identity and credibility
5. Research prospective customers, accounts, industries, and stakeholders using legitimate digital sources
6. Apply social selling techniques for finding, understanding, engaging, and developing prospective customers
7. Create customer-relevant content and interactions that support credibility and trust
8. Develop professional messages for email, social platforms, messaging applications, and virtual meetings
9. Avoid spam, excessive automation, misleading personalization, and aggressive digital outreach
10. Distinguish a contact, lead, prospect, qualified opportunity, customer, and account within a CRM process
11. Record accurate and useful customer information in a CRM system
12. Maintain clear sales stages, next steps, responsibilities, and follow-up dates
13. Use CRM data to prioritize leads, manage opportunities, and strengthen pipeline visibility
14. Apply practical CRM habits that improve collaboration, forecasting, and customer continuity
15. Identify appropriate AI-assisted selling use cases
16. Write clear prompts for sales research, communication, preparation, and analysis
17. Review AI-generated outputs for accuracy, relevance, bias, tone, confidentiality, and customer fit
18. Protect customer information and comply with organizational privacy and security policies
19. Combine digital, social, CRM, and AI-assisted activities into one coherent sales workflow
20. Develop a personal 30-day Digital, Social, CRM, and AI-Assisted Selling Action Plan

TRAINING OUTLINE

One-Day Digital, Social, CRM, and AI-Assisted Selling Training Program

Time	Modules, Topics, and Subtopics	Supporting Activities and Outputs
8:00–10:00 AM	<p>MODULE 1: BUILDING THE FOUNDATION FOR EFFECTIVE DIGITAL SELLING</p> <ul style="list-style-type: none"> • Understanding digital selling in the modern customer journey • Digital selling versus digital marketing, e-commerce, online advertising, and traditional selling • How customers use digital channels before, during, and after a sales conversation • Connecting digital activities with prospecting, discovery, presentation, follow-up, negotiation, closing, and account management • Identifying appropriate digital touchpoints • Websites, email, messaging applications, social platforms, online events, video meetings, digital presentations, customer portals, and professional communities • Selecting channels based on the customer, purpose, stage, urgency, and level of relationship • Understanding synchronous and asynchronous digital communication • Building a credible professional digital presence • Aligning profile information with the organization's brand and value proposition • Communicating expertise without exaggeration • Researching industries, organizations, decision-makers, and potential business triggers • Evaluating the credibility and relevance of online information 	<p>Digital Seller Reality Check</p> <p>Participants assess their present use of digital tools, online credibility, response habits, lead sources, follow-up practices, and technology challenges.</p> <p>Digital Customer Journey Mapping</p> <p>Teams identify the digital touchpoints customers may use from initial awareness through purchase and relationship development.</p> <p>Channel Selection Challenge</p> <p>Participants determine the most appropriate digital channel for different customer situations and sales objectives.</p> <p>Output: Digital Selling and Customer Touchpoint Map</p>

	<ul style="list-style-type: none"> • Distinguishing research from intrusive personal investigation • Personalizing digital communication without appearing invasive • Managing response expectations and digital etiquette • Balancing speed, accuracy, relevance, and professionalism • Creating an integrated digital selling rhythm 	
10:00–10:15 AM	Morning Break	
10:15 AM–12:00 NN	<p>MODULE 2: SOCIAL SELLING, DIGITAL OUTREACH, AND TRUSTED ONLINE ENGAGEMENT</p> <ul style="list-style-type: none"> • Understanding social selling and its role in the sales process • Social selling versus social media marketing, advertising, networking, and mass messaging • Building a professional social profile that establishes relevance and credibility • Clarifying the customers, industries, problems, and outcomes the seller serves • Using appropriate profile headlines, summaries, experience, proof, and contact information • Identifying prospective customers and stakeholders through social platforms • Using social information to understand customer interests, priorities, events, and changes • Social listening and recognizing relevant business signals • Following target accounts, organizations, decision-makers, industries, and professional communities • Engaging before pitching • Responding to posts and discussions thoughtfully • Sharing practical insights, educational content, useful perspectives, and customer- 	<p>Profile Credibility Scan</p> <p>Participants assess sample or actual professional profiles based on relevance, credibility, customer focus, and clarity.</p> <p>Engage Before You Pitch Challenge</p> <p>Teams develop ways to start conversations through relevant comments, insights, questions, and shared information.</p> <p>Digital Message Makeover Laboratory</p> <p>Participants improve generic connection requests, direct messages, emails, and follow-up messages.</p> <p>Social Selling Simulation</p> <p>Participants move a digital interaction from research and engagement toward a relevant sales conversation.</p> <p>Output: Social Selling Profile, Content, and Outreach Plan</p>

	<p>relevant information</p> <ul style="list-style-type: none"> • Creating content that builds professional credibility • Educational, problem-awareness, customer-insight, case-based, and solution-related content • Avoiding continuous self-promotion and excessive product posting • Moving from public engagement to an appropriate private conversation • Developing personalized connection requests and direct messages • Writing concise, relevant, and professional prospecting emails • Using messaging applications appropriately • Creating multichannel outreach sequences • Following up without becoming repetitive, intrusive, or aggressive • Using social proof, testimonials, references, and case evidence ethically • Distinguishing professional persistence from spam and harassment • Protecting personal and customer boundaries online 	
12:00 NN–1:00 PM	Lunch Break	
1:00–3:00 PM	<p>MODULE 3: CRM-POWERED SELLING, PIPELINE MANAGEMENT, AND CUSTOMER FOLLOW-THROUGH</p> <ul style="list-style-type: none"> • Understanding Customer Relationship Management • CRM as a customer, sales, and relationship-management system—not merely a reporting requirement • CRM versus spreadsheet, contact list, email inbox, personal notebook, and sales report • Understanding contacts, organizations, leads, accounts, opportunities, activities, and customers • Establishing clear definitions and data 	<p>Clean, Complete, or Cluttered?</p> <p>Participants examine sample CRM records and identify missing, inaccurate, excessive, outdated, or low-value information.</p> <p>Pipeline Stage Challenge</p> <p>Teams classify sales opportunities according to evidence-based pipeline stages and determine the correct next action.</p> <p>CRM Follow-Through Simulation</p> <p>Participants record a customer interaction, update the opportunity, assign</p>

	<p>standards</p> <ul style="list-style-type: none"> • Recording accurate, relevant, and current customer information • Avoiding duplicate, incomplete, outdated, speculative, and unnecessary personal information • Documenting customer interactions, needs, concerns, commitments, and next steps • Maintaining ownership and responsibility for every active opportunity • Understanding sales stages and stage-entry requirements • Lead capture, qualification, discovery, solution development, proposal, negotiation, commitment, and implementation • Using CRM information to prioritize leads and accounts • Setting follow-up dates, reminders, tasks, and customer actions • Creating a reliable single source of customer information • Supporting handoffs between Sales, Marketing, Customer Service, Operations, Finance, and other teams • Maintaining customer continuity when account ownership changes • Reviewing pipeline quality and opportunity movement • Identifying stalled, inflated, duplicated, or poorly qualified opportunities • Maintaining evidence-based probability and forecast information • Using dashboards and reports to support decisions • CRM automation for reminders, routine activities, and approved workflows • Avoiding automation that removes necessary human judgment • Protecting customer data through authorized access and responsible use 	<p>responsibilities, schedule the next step, and identify the required follow-up.</p> <p>Output: CRM Sales Discipline and Pipeline Management Checklist</p>
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	<ul style="list-style-type: none"> • Creating consistent daily and weekly CRM habits 	
3:00–3:15 PM	Afternoon Break	
3:15–5:00 PM	<p>MODULE 4: RESPONSIBLE AI-ASSISTED SELLING AND INTEGRATED DIGITAL SALES EXECUTION</p> <ul style="list-style-type: none"> • Understanding artificial intelligence and generative AI in sales • AI-assisted selling versus fully automated or autonomous selling • What AI can support—and what still requires human judgment • Appropriate AI-assisted sales use cases • Account and industry briefing • Prospect-research organization • Customer-persona and stakeholder hypotheses • Sales-call and meeting preparation • Discovery-question development • Email, message, and social-content drafting • Value-proposition and presentation development • Proposal-outline assistance • Meeting-summary and follow-up preparation • Objection-handling and sales role-play practice • Opportunity-risk and next-step analysis • Sales coaching and self-reflection • Understanding prompts, context, instructions, constraints, and output formats • Providing sufficient business and customer context without exposing confidential information • Using a practical AI sales prompt structure • Reviewing AI outputs for factual accuracy, customer relevance, tone, bias, unsupported claims, and missing information • Identifying fabricated, outdated, or 	<p>AI or Human Judgment? Challenge</p> <p>Participants decide which sales tasks may be supported by AI and which require direct seller, manager, technical, legal, or customer involvement.</p> <p>AI Sales Prompt Laboratory</p> <p>Participants develop prompts for call preparation, outreach, discovery questions, value propositions, follow-ups, and role-play practice.</p> <p>Verify Before You Send Exercise</p> <p>Participants review sample AI outputs for incorrect facts, exaggerated claims, poor tone, privacy concerns, and customer irrelevance.</p> <p>Integrated Digital Selling Simulation</p> <p>Participants research a prospect, identify a social-engagement opportunity, prepare outreach, record the interaction in CRM, use AI to support preparation, and establish the next customer action.</p> <p>Final Outputs:</p> <ol style="list-style-type: none"> 1. Responsible AI-Assisted Sales Workflow 2. Personal 30-Day Digital, Social, CRM, and AI-Assisted Selling Action Plan

	<p>unreliable AI-generated information</p> <ul style="list-style-type: none"> • Avoiding unapproved uploading of customer, employee, company, or confidential information • Protecting personal data and respecting applicable privacy requirements • Avoiding deceptive personalization and false claims of familiarity • Avoiding automated spam and excessive message volume • Maintaining human accountability for customer communication and decisions • Determining when AI should not be used • Combining digital research, social engagement, CRM records, and AI assistance into one workflow • Establishing organizational approval, review, and documentation practices • Measuring technology use through customer and sales outcomes rather than tool activity alone 	
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TRAINING METHODOLOGY

The program uses the MSS EnterTRAINment approach, combining practical instruction, active participation, digital application, realistic sales situations, collaborative problem-solving, and enjoyable experiential learning.

The methodology includes:

- Interactive lecturettes and facilitated discussions
- Digital selling self-assessment
- Customer digital-journey mapping
- Channel-selection exercises
- Professional profile evaluation
- Social-listening and account-research activities
- Social engagement and content-development challenges
- Digital outreach-message laboratories
- Email and direct-message simulations
- CRM data-quality exercises
- Pipeline-stage and opportunity-management activities
- Follow-up and workflow planning
- AI prompting laboratories
- AI output evaluation and verification

- Responsible AI and privacy scenarios
- Integrated digital selling simulations
- Peer observation and structured feedback
- Facilitator coaching and guided debriefing
- Personal digital selling action planning

The program may be customized using the organization's actual:

- Sales process
- Digital platforms
- CRM system
- Customer profiles
- Products and services
- Target industries
- Social media channels
- Messaging standards
- Data-privacy policies
- Approved AI applications
- Sales pipeline stages
- Customer communication templates
- Automation rules
- Performance indicators

KEY PROGRAM DESIGN STRENGTHS

- Integrates digital selling, social selling, CRM usage, and AI assistance in one coherent process
- Connects technology with established consultative and relationship-selling principles
- Develops professional online credibility rather than superficial social-media activity
- Moves participants from random posting to purposeful social engagement
- Strengthens personalized outreach without encouraging spam
- Teaches CRM as an active sales tool rather than a passive reporting system
- Improves customer-data quality, follow-up, pipeline discipline, and collaboration
- Shows practical AI-assisted selling applications without overstating AI capabilities
- Maintains human judgment, accountability, and customer relationship ownership
- Includes Philippine data-privacy considerations
- Addresses confidentiality, accuracy, bias, deception, and over-automation risks
- Produces practical tools participants can use immediately
- Remains vendor-neutral and may be adapted to different CRM and AI platforms
- Applicable to B2B, B2C, retail, technical, field, institutional, professional-service, and account-based selling environments

WHO SHOULD ATTEND

This Digital, Social, CRM, and AI-Assisted Selling Training Program is suitable for:

- Sales representatives
- Sales executives
- Account executives
- Account managers
- Key account managers
- Business development professionals
- Relationship managers
- Technical sales professionals
- Solutions consultants
- Customer success professionals
- Social selling and digital prospecting personnel
- CRM users and sales operations employees
- Sales supervisors and managers
- Marketing personnel supporting sales development
- Entrepreneurs and business owners
- Professionals responsible for prospecting, customer engagement, pipeline development, and sales follow-through

EXPECTED TRAINING OUTPUTS

At the end of the program, participants will produce:

1. Digital Selling and Customer Touchpoint Map

A practical guide showing where and how digital channels may support the customer journey and sales process.

2. Social Selling Profile, Content, and Outreach Plan

A structured plan covering:

- Professional online credibility
- Target customers
- Relevant social platforms
- Content themes
- Engagement activities
- Connection approaches
- Direct messages
- Digital follow-up

3. CRM Sales Discipline and Pipeline Management Checklist

A practical checklist for maintaining accurate customer information, opportunity stages, activity records, follow-up dates, next steps, and pipeline integrity.

4. Responsible AI-Assisted Sales Workflow

A structured guide identifying:

- Appropriate AI-assisted tasks
- Required human input
- Prompt structure
- Verification requirements
- Confidentiality restrictions
- Approval responsibilities
- Final human review

5. Personal 30-Day Digital, Social, CRM, and AI-Assisted Selling Action Plan

A practical improvement plan containing digital activities, social-engagement routines, CRM habits, AI-assisted workflows, customer follow-ups, and performance measures.

WHAT IS DIGITAL SELLING?

Digital selling is the use of digital channels, information, tools, and technologies to identify, understand, engage, develop, and support prospective and existing customers throughout the sales process.

Digital selling may involve:

- Online customer and market research
- Email communication
- Professional social platforms
- Messaging applications
- Video meetings
- Digital presentations and proposals
- Online demonstrations
- Webinars and virtual events
- Customer portals
- CRM systems
- Sales automation
- Data analysis
- Artificial intelligence

Digital selling is not simply selling products through an online store. It includes the human-led use of technology in relationship development and sales execution.

WHAT IS SOCIAL SELLING?

Social selling is the use of professional social networks to build credibility, understand prospective customers, participate in relevant conversations, develop relationships, and create appropriate sales opportunities.

Social selling may include:

- Strengthening a professional profile
- Following target accounts and industry discussions
- Identifying prospective customers and stakeholders
- Monitoring relevant business developments
- Sharing useful content
- Commenting thoughtfully
- Building professional connections
- Initiating relevant conversations
- Nurturing relationships over time

Social selling is not mass messaging, continuous self-promotion, or adding as many contacts as possible.

WHAT IS CRM-POWERED SELLING?

CRM-powered selling uses a Customer Relationship Management system to organize customer information, manage interactions, schedule follow-ups, track sales opportunities, support collaboration, and maintain visibility over the sales pipeline.

An effective CRM process helps sellers and organizations understand:

- Who the customer is
- What has already happened
- What the customer needs
- Who is involved
- What has been promised
- What stage the opportunity has reached
- What must happen next
- Who is responsible
- When the follow-up is due

A CRM system becomes valuable only when employees enter accurate information and use it consistently.

WHAT IS AI-ASSISTED SELLING?

AI-assisted selling is the responsible use of artificial intelligence to support selected sales activities while keeping the salesperson accountable for customer understanding, decisions, communication, and relationship management.

AI may assist with:

- Organizing research
- Preparing questions
- Drafting messages
- Improving written communication
- Summarizing information
- Generating alternative approaches
- Practicing customer conversations
- Identifying possible risks or gaps
- Creating initial outlines
- Supporting sales coaching

AI should not independently determine customer needs, make unsupported claims, promise results, process confidential information without authorization, or replace professional judgment.

DIGITAL, SOCIAL, CRM, AND AI-ASSISTED SELLING

Digital Selling	Social Selling	CRM-Powered Selling	AI-Assisted Selling
Uses digital channels across the sales process	Uses social networks to build credibility and relationships	Uses organized customer data to manage interactions and opportunities	Uses AI to support selected sales tasks
Includes email, messaging, video, websites, and online tools	Includes profiles, content, insights, connections, and engagement	Includes contacts, accounts, activities, stages, tasks, and pipeline records	Includes research, drafting, preparation, summarization, and analysis
Improves customer access and responsiveness	Creates trust and relevant conversations	Strengthens continuity, follow-up, and management visibility	Improves speed, productivity, and idea development
Requires digital communication discipline	Requires authenticity and relationship-building	Requires accurate and current data	Requires verification, privacy safeguards, and human review

The strongest approach integrates all four without allowing technology to replace customer understanding.

THE INTEGRATED DIGITAL SELLING PROCESS

1. Identify

Define:

- Target customers
- Priority industries
- Ideal account characteristics
- Customer problems
- Relevant digital channels

2. Research

Understand:

- The organization
- The industry
- Potential stakeholders
- Business developments
- Customer priorities
- Possible reasons for engagement

3. Establish Credibility

Strengthen:

- Professional profile
- Expertise positioning
- Relevant content
- Social proof
- Online consistency

4. Engage

Use:

- Relevant comments
- Shared insights
- Email
- Direct messages
- Referrals
- Online events
- Virtual conversations

5. Record

Update the CRM with:

- Contact information
- Source
- Interaction history
- Customer needs
- Stakeholders
- Commitments
- Next steps

6. Prepare

Use authorized tools and AI assistance to:

- Organize available information
- Prepare questions
- Develop customer-centered messages
- Anticipate concerns
- Create meeting plans

7. Converse

Conduct human-led:

- Discovery
- Presentation
- Demonstration
- Proposal discussion
- Negotiation
- Relationship development

8. Follow Through

Use the CRM and appropriate digital channels to:

- Confirm agreements
- Send useful information
- Schedule actions
- Maintain continuity
- Advance the opportunity

9. Review

Evaluate:

- Engagement quality
- Customer response
- Opportunity movement
- Pipeline health
- Sales conversion
- Technology effectiveness

A PRACTICAL AI SALES PROMPT STRUCTURE

Participants may use the following structure when working with an authorized AI application:

1. Context

Explain the sales situation, customer type, product, service, or objective without exposing prohibited information.

2. Goal

State what assistance is required.

3. Audience

Describe the intended customer or stakeholder.

4. Information

Provide the relevant verified facts the AI may use.

5. Constraints

Specify tone, length, policies, prohibited claims, and confidentiality requirements.

6. Output Format

Request a particular format such as a message, outline, question list, table, or role-play.

7. Verification

Ask the system to identify assumptions, missing information, and statements requiring confirmation.

The final output must still be checked and approved by the salesperson.

RESPONSIBLE AI-ASSISTED SELLING CHECKLIST

Before using AI-generated sales content, the seller should ask:

- Is the information factually correct?
- Is it based on verified customer information?
- Does it contain unsupported promises or exaggerated claims?
- Is the tone appropriate for the customer and relationship?
- Does it sound personal and natural rather than automated?
- Does it disclose or infer sensitive information inappropriately?
- Was confidential information entered into an unapproved tool?
- Does the message comply with company policies?
- Could the content mislead the customer?
- Has a qualified person reviewed technical, legal, financial, or contractual claims?
- Does the final message still reflect human judgment and accountability?

CRM DATA-QUALITY PRINCIPLES

Useful CRM information should be:

- Accurate
- Relevant
- Current
- Complete enough for the intended purpose
- Consistent
- Understandable
- Properly sourced
- Securely handled
- Limited to necessary information
- Connected with a clear sales or customer purpose

CRM records should not contain gossip, discriminatory assumptions, unnecessary personal details, unverified claims, or information that employees are not authorized to collect or store.

SOCIAL SELLING CONTENT THEMES

Sales professionals may share:

Educational Content

Practical information that helps customers understand an issue.

Problem-Awareness Content

Insights that help customers recognize a risk, inefficiency, or missed opportunity.

Customer-Question Content

Answers to frequently asked questions.

Industry-Insight Content

Relevant observations about market or customer developments.

Case-Based Content

Examples of how a type of problem was approached, subject to confidentiality.

Process Content

Explanations of how customers may evaluate, prepare for, or implement a solution.

Professional Perspective

The salesperson's informed and responsible viewpoint.

Social content should create value and credibility rather than become a continuous advertisement.

DIGITAL SELLING PERFORMANCE MEASURES

Organizations may monitor:

- Target accounts researched
- Relevant stakeholders identified
- Professional profile completeness
- Meaningful social engagements
- Personalized outreach sent
- Response rate
- Digital conversations initiated
- Meetings scheduled
- Leads entered into CRM
- CRM record completeness
- Follow-ups completed on time
- Opportunities advanced
- Pipeline conversion
- Sales-cycle movement
- Stalled opportunity rate
- Customer response time
- Content engagement from relevant audiences
- AI-assisted task time saved
- AI-generated outputs requiring correction

- Qualified opportunities and revenue influenced

Measures should connect digital activity with customer and business outcomes.

COMMON DIGITAL SELLING MISTAKES

Sales professionals may weaken results when they:

- Use every platform without a clear purpose
- Build an online profile focused only on personal achievements
- Collect connections without developing relationships
- Post only promotional content
- Send the same message to every prospect
- Personalize messages using intrusive information
- Contact customers repeatedly across too many channels
- Automate messages without reviewing them
- Ignore the customer's preferred communication method
- Fail to record important interactions in the CRM
- Enter incomplete or inaccurate customer information
- Keep opportunities in the wrong pipeline stage
- Use AI-generated content without verifying facts
- Upload confidential customer information into unauthorized applications
- Allow AI to invent proof, results, references, or customer claims
- Measure activity without evaluating opportunity quality
- Assume technology can compensate for weak selling skills
- Replace human conversation with continuous digital communication

ETHICAL DIGITAL, SOCIAL, CRM, AND AI-ASSISTED SELLING PRINCIPLES

Professional sellers should:

- Use accurate and truthful information
- Respect customer communication preferences
- Avoid spam, harassment, and deceptive messaging
- Protect customer and organizational information
- Collect and process only necessary information
- Use authorized systems and applications
- Maintain accurate CRM records
- Avoid misleading personalization
- Review AI-generated outputs carefully
- Disclose important limitations and conditions
- Avoid fabricating familiarity, endorsements, results, or urgency

- Maintain human accountability
- Respect applicable privacy, security, legal, and organizational requirements
- Prioritize long-term trust over short-term digital activity

WHAT THIS PROGRAM IS NOT

This program is not limited to:

- Posting on social media
- Creating a LinkedIn account
- Sending automated messages
- Buying contact databases
- Using a CRM for management reporting
- Copying customer information into software
- Generating emails through artificial intelligence
- Creating large quantities of digital content
- Automating every follow-up
- Replacing salespeople with technology
- Collecting as much customer data as possible
- Using AI-generated claims without verification

It is a structured approach to using digital channels, trusted social engagement, accurate CRM information, and responsible AI assistance to improve customer relationships and sales execution.

WHY DIGITAL, SOCIAL, CRM, AND AI-ASSISTED SELLING TRAINING MATTERS

Organizations may invest in technology but fail to achieve results when salespeople do not understand how the tools support the customer journey.

A practical **Digital, Social, CRM, and AI-Assisted Selling Training in the Philippines** helps participants move from:

- Random online activity to strategic digital selling
- Self-promotional posting to value-adding social engagement
- Generic messages to customer-relevant outreach
- Personal notes to shared CRM intelligence
- Inconsistent follow-up to disciplined pipeline management
- Tool adoption to business application
- Unverified AI content to responsible AI assistance
- Excessive automation to human-led customer relationships
- Digital activity counts to measurable sales outcomes

COMMON DIGITAL, SOCIAL, CRM, AND AI-ASSISTED SELLING TOPICS

The program may include or be customized around:

- Digital selling fundamentals
- Selling digitally
- Digital customer engagement
- Social selling
- Selling socially
- Professional online branding
- Social prospecting
- Digital outreach
- Email prospecting
- Direct messaging
- Social content for sales
- Customer Relationship Management
- CRM selling
- Selling using CRM
- CRM data quality
- Pipeline management
- Sales automation
- Lead and opportunity tracking
- AI-assisted selling
- Selling using AI
- AI sales prompts
- AI-assisted customer research
- AI-assisted email writing
- AI sales-call preparation
- AI-assisted sales coaching
- Responsible AI use
- Data privacy in digital selling
- Digital sales action planning

RECOMMENDED FOLLOW-THROUGH PROGRAMS

- Sales Prospecting and Lead Generation
- B2B Sales and Business Development
- Consultative Selling and Solution Selling
- Sales Presentation and Persuasive Pitching
- Sales Negotiation, Objection Handling, and Closing
- Key Account Management

- Customer Relationship Management
- Digital Marketing for Sales Support
- Business Communication
- Social Media and Content Strategy
- Data Privacy Awareness
- Sales Management, Leadership, and Coaching
- AI Productivity for Business Professionals

FREQUENTLY ASKED QUESTIONS

What is Digital Selling Training?

Digital Selling Training teaches sales professionals how to use digital channels, customer information, communication tools, online research, social platforms, CRM systems, and other technologies to support prospecting, engagement, follow-up, opportunity development, and customer relationships.

What is Social Selling Training?

Social Selling Training develops the ability to establish professional credibility, identify prospective customers, understand relevant business interests, participate in useful conversations, share insights, build relationships, and initiate appropriate sales engagement through social platforms.

What is CRM Selling Training?

CRM Selling Training helps salespeople use a Customer Relationship Management system to organize customer data, document interactions, manage follow-ups, track opportunities, maintain pipeline accuracy, coordinate account activities, and strengthen sales continuity.

What is AI-Assisted Selling Training?

AI-Assisted Selling Training teaches participants how to use authorized artificial intelligence applications to support research, preparation, communication, analysis, practice, and follow-up while maintaining human judgment, verification, privacy, and accountability.


Is AI-assisted selling the same as automated selling?

No. AI-assisted selling supports human sales work. Automated selling may execute predefined activities with limited human involvement. Customer-facing communications and important sales decisions still require appropriate human review.

Who should attend this program?

The program is suitable for sales representatives, account managers, business development professionals, relationship managers, technical sellers, customer success personnel, entrepreneurs, sales leaders, CRM users, and other customer-facing employees.



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Does the program focus on a particular CRM platform?

The core program is vendor-neutral. It may be customized for the organization's actual CRM platform, fields, sales stages, dashboards, and workflows.

Does the program require a paid AI tool?

Not necessarily. Demonstrations and exercises may use an approved platform selected by the organization. The emphasis is on responsible methods rather than dependence on one application.

Will participants learn how to write AI prompts?

Yes. Participants learn a structured approach to giving context, defining the goal, identifying the audience, specifying constraints, requesting an output format, and verifying results.

Does the program cover LinkedIn?

Professional social platforms such as LinkedIn may be used as examples, particularly for B2B selling. The principles may also be adapted to other appropriate platforms.

Does the training cover data privacy?

Yes. The program reinforces responsible collection, recording, processing, sharing, and use of customer information as well as restrictions on entering personal or confidential information into unapproved AI systems.

Can the program be customized?

Yes. The activities may be adapted to the organization's sales process, customer profiles, social platforms, CRM system, approved AI tools, policies, products, services, and pipeline stages.

What outputs will participants produce?

Participants develop a Digital Customer Touchpoint Map, Social Selling Plan, CRM Sales Discipline Checklist, Responsible AI-Assisted Sales Workflow, and 30-Day Digital Selling Action Plan.