

2025

# INDUSTRY4.0 FORUM AND ERP SHOOTOUT

July 16-17  
2025  
Chicago, IL

PRODUCED BY  
**MetalForming**  
Magazine

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# AI Strategy and Application Across Sales, Marketing and Business Analysis

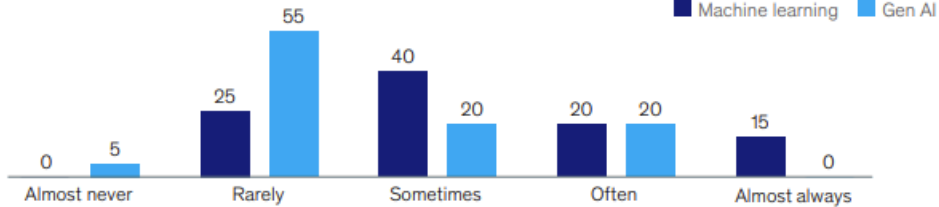


Amy Julian – Strategy & Transformation Partner

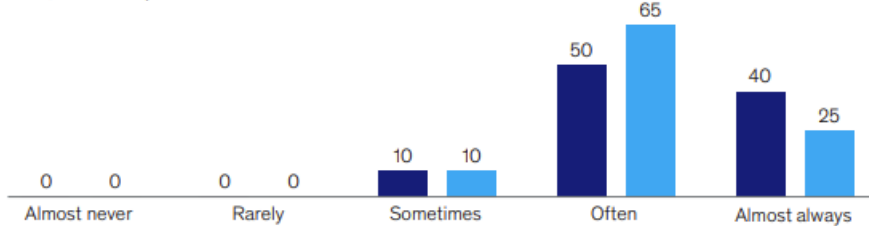


# Why AI, Why Now?

Extent to which commercial leaders feel their organizations are using machine learning / gen AI,<sup>1</sup>  
% of responses



Extent to which commercial leaders think their organizations should be using machine learning / gen AI,<sup>2</sup> % of responses



<sup>1</sup>Senior executives in significant global B2B and B2C sales and marketing organizations across a wide range of industries and company maturity levels were asked: To what extent is your organization using ML / gen AI solutions?  
<sup>2</sup>Q: How much do you think your organization should be using ML / gen AI solutions?  
Source: McKinsey analysis

- Global manufacturing trends and digital urgency
- Rising complexity and volume of data
- B2B decision cycles are longer—AI helps decode behavior patterns

Research indicates that companies investing in AI are seeing a **revenue uplift of 3-15%** and a sales **ROI uplift of 10-20%**.



# Common Challenges in the Industry

01

## **Disjointed CRM and ERP Systems**

Can cause disconnects in quoting and fulfillment accuracy

02

## **Manual and Inconsistent Quoting Processes**

Heavy reliance on spreadsheets, tribal knowledge, and paper-based systems

03

## **Slow Response Time to Inquiries**

Delayed quote delivery due to back-and-forth with engineering or operations

04

## **Poor Visibility into Historical Data**

Lack of centralized access to customer specs, order history, and pricing trends

05

## **Limited Standardization of Specs & Tolerances**

Every job treated as custom due to inadequate product or process libraries

06

## **Handoffs Between Sales, Engineering, & Production**

Roles are siloed; tribal handoffs often result in missed requirements, miscommunications, or production delays.

07

## **Inaccurate Forecasting and Demand Planning**

Quote volume doesn't translate into meaningful insights for production or material planning

08

## **Delayed or Incomplete Order Fulfillment**

Orders are accepted without real-time capacity checks.

09

## **Inefficient AR and Collections Processes**

Billing issues (e.g., mismatches between quotes and invoices, or slow dispute resolution)

10

## **Minimal Use of Data to Drive Pricing or Terms Strategy**

Pricing strategies often don't consider real-time market data, customer behavior, or margin analysis

# Where AI Delivers Value

## Smarter Prospecting & Lead Prioritization

Lead scoring models use both historical win/loss data and behavioral triggers to **prioritize reps' outreach** — turning “cold” lists into action-ready pipelines.

Detect **white space** opportunities in current accounts.

## Talent Management and Productivity

Analyze employee **performance** and **sentiment**, identify potential talent gaps or culture fit risks.

Identify high performers and make faster decisions on **future state organization** design.

## Customer Analytics & Pricing Strategy

Consolidate and analyze customer data to provide **fast recommendations** for cross or up-selling. Develop retention and marketing strategies based on insights from combined data.

Monitor result of any pricing actions,

## Marketing Optimization

Analyze past customer behavior, industry or customer signals, and web interacts to segment audiences into actionable clusters.

For firms selling through distributors or dealer networks, AI can surface **indirect influencers**.

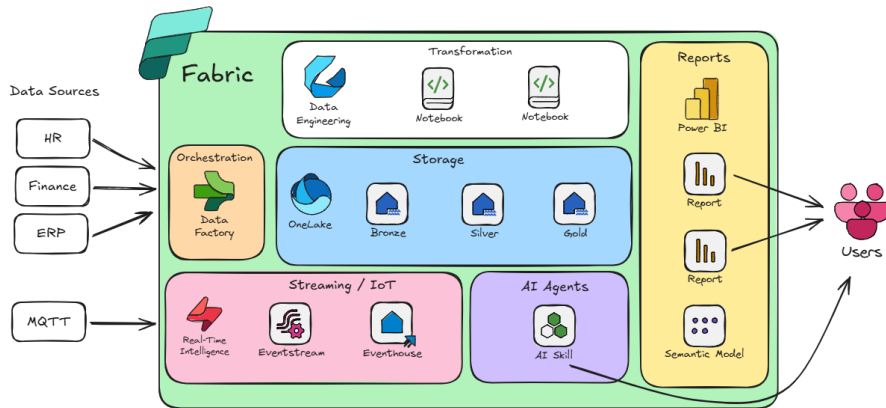
## Territory and Account Intelligence

Helps reps prepare for meetings with **auto-generated company briefs**, account histories, and recent activity summaries

**Territory heatmaps** and buying cycle predictions to better prioritize travel or outreach.



# Data: The Backbone of Analytics & AI

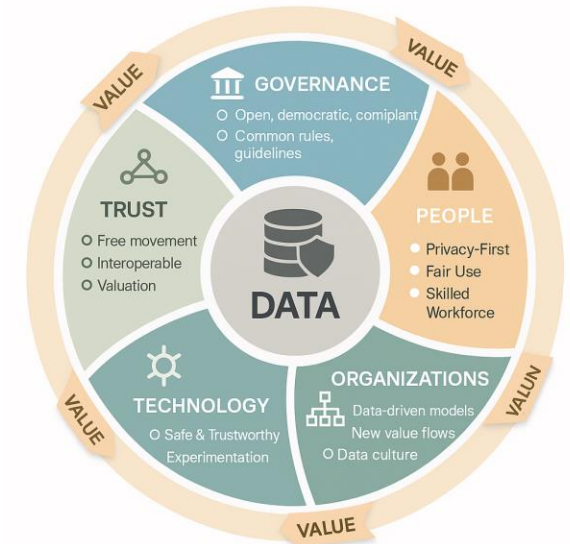
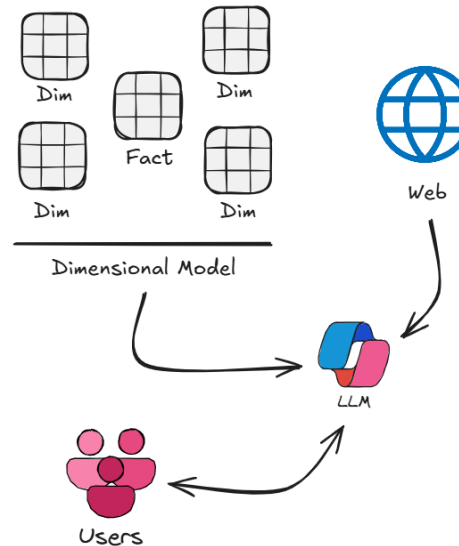


## PROCESSING & CONSOLIDATION

A data warehouse environment provides the necessary location, compute and processing power to combine, clean, enrich, and model disparate data sources that might otherwise be siloed across the organization.

## SETTING STAGE FOR AI

Organizational AI initiatives require company data as the key driver. A data warehouse supporting clean, well-labeled, and dimensional modeled tables can be easily interpreted and read by AI tools leading to a faster path to insights and next steps



## DATAAS CURRENCY

Organizations recognize their data is an asset in the serving customers and enabling internal teams to innovate. Building well-governed and accessible channels to this data, underpinned by a data warehouse, provides a tool in enabling this growth strategy based on data.

# Use Case Spotlight: Sales Enablement

Without AI



Desktop research searching multiple sources, or limited information gathered

Handled by call center with script and ability to route caller to correct resource.

Information gathered on calls or via emails manually entered in CRM.

VS

With AI



**Account Research**

AI Agent can pull together internal and external data sources for fast, comprehensive overview

**Inbound Inquiries**

Prompt-based and natural language engagement with common customer inquiries.

**Customer Communication**

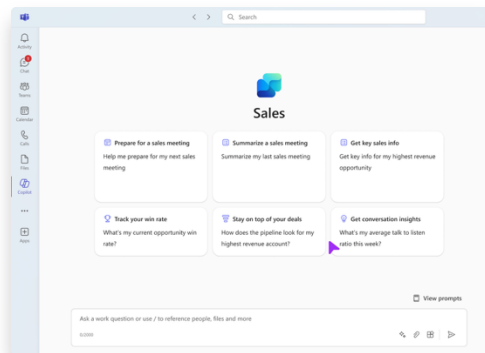
Email + CRM integration reduce manual data entry and keeps communication history consolidated.



# Use Case Spotlight: Sales Enablement



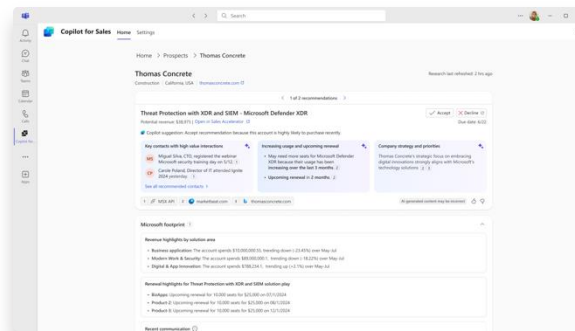
## Sales Chat



[aka.ms/SalesChatDemo](https://aka.ms/SalesChatDemo)



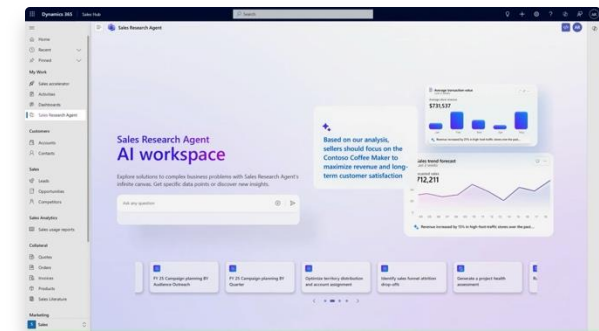
## Sales Agent



[aka.ms/SalesAgentDemo](https://aka.ms/SalesAgentDemo)



## Sales Research Agent



[aka.ms/SalesResearchAgentDemo](https://aka.ms/SalesResearchAgentDemo)

Choose your demo





# Use Case Spotlight: Sales Enablement

armanino



## Company Background Reporter (Sales)

**Prompt Overview:** The Company Background Reporter is designed to assist sales professionals in preparing for customer calls by providing a comprehensive understanding of a company's operations, market position, and key details.

**Instructions:** Copy & paste the prompt below into the generative-AI tool of your choosing.

armanino



## Competitive Battlecard Generator (Sales)

**Prompt Overview:** The Competitive Battlecard Generator is designed to equip sales teams with concise, actionable insights to outperform competitors in sales scenarios.

**Instructions:** Copy & paste the prompt below into the generative-AI tool of your choosing.



# Use Case Spotlight: Marketing

Without AI



VS



With AI

Manual writing and reliance on external agencies. Slow turn, more inconsistent.

**Content  
Creation**

Content generated, repurposed and tailored with significantly faster turnaround times.

Segmented by static fields like industry or geography that are manually entered.

**Segmentation**

Uses behavioral or intent-based signals to dynamically create precise targeting at the right time

Allocated based on historical performance or intuition, limited visibility into ROI

**Marketing  
Spend**

Optimized across channels based on predictive performance models and live campaign feedback.



# Use Case Spotlight: Digital Marketing



# Use Case Spotlight: Business Analysis

Without AI



VS



With AI

Intuition or opportunistic, no pattern recognition or data to support.

**Cross/Up Selling**

Natural language queries can surface insights from multiple source systems to reveal patterns that guide actions.

Historical averages or static models that can't account for shifts in customer behavior or market volatility.

**Demand Planning**

Predictive models analyze order history, seasonality, and macro trends to generate dynamic forecasts.

Anecdotal feedback or lagging metrics like complaints or late payments to assess customer status.

**Customer Health**

Real-time signals across systems—order frequency, engagement, support history—combined into a customer health score.





# Use Case Spotlight: Business Analysis



**DATE RANGE**    **Week Number**

Date: 1/1/2025    2/28/2025

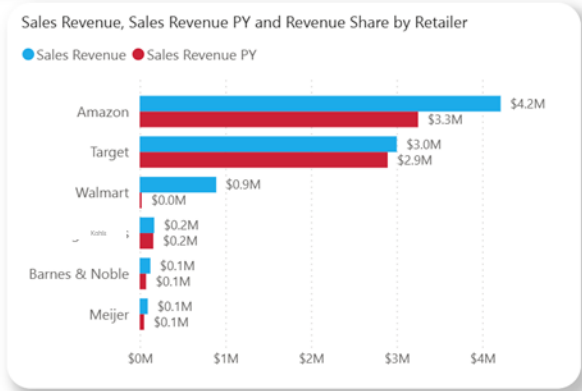
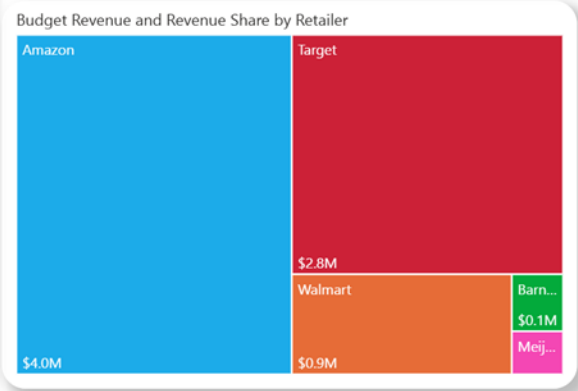
Channel: Domestic    Canada

Retailer: All

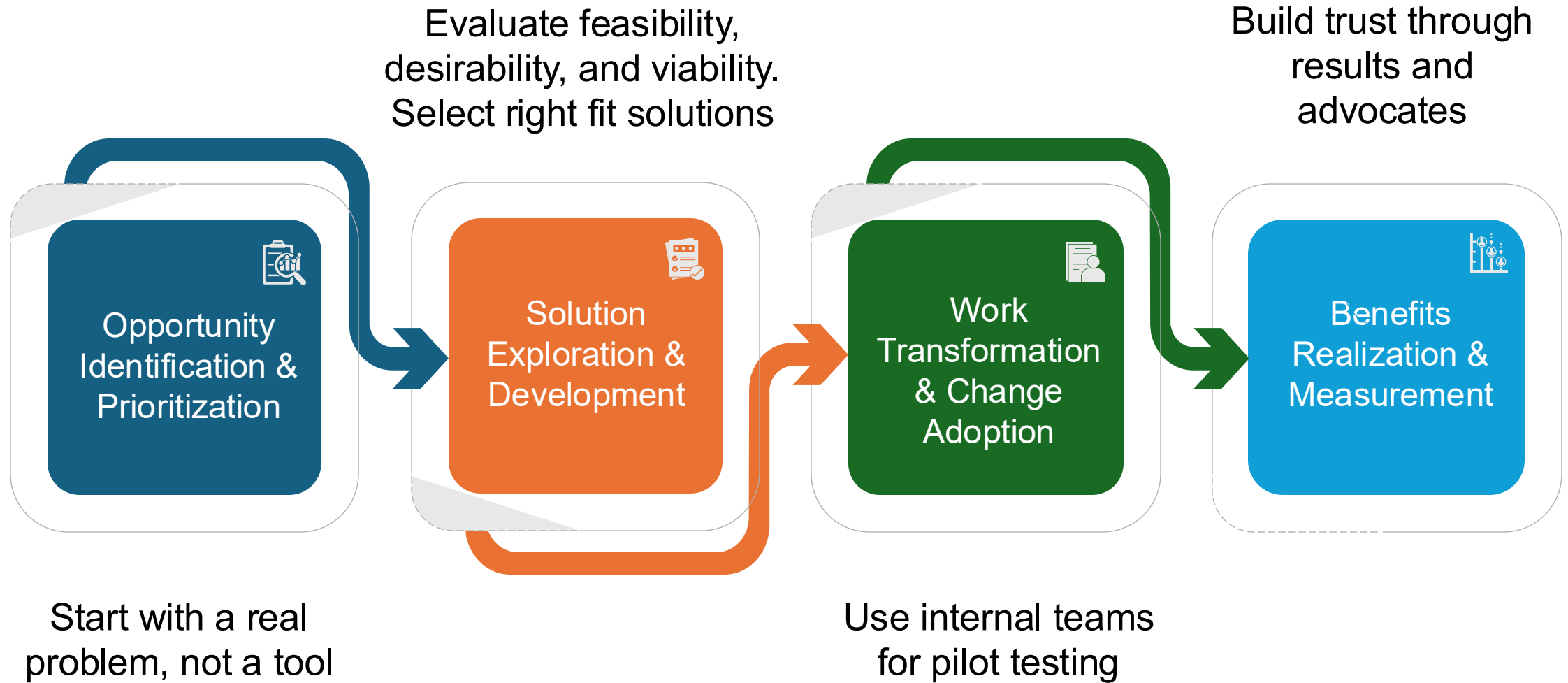
Item: All

Item Status: All

Retailer	Sales Units	Sales Units PY	Unit Growth	Sales Revenue	Sales Revenue PY	Revenue Growth	Revenue Variance	Revenue Share	Budget Revenue	Sales vs Budget Variance	Sales Revenue vs Budget %
Domestic			87%			32%		100%			8%
Amazon			66%			30%		50%			6%
Barnes & Noble			153%			68%		1%			-0%
Magna-Tiles			39%			7%		2%			-100%
Meijer			164%			82%		1%			0%
Target			65%			4%		35%			9%
Walmart			4,343%			3,931%		11%			-5%
Total			87%			32%		100%			8%



# AI Strategy Framework for Mid-Market Firms

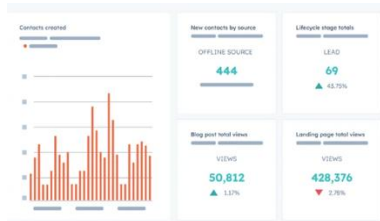


# Key Metrics to Track

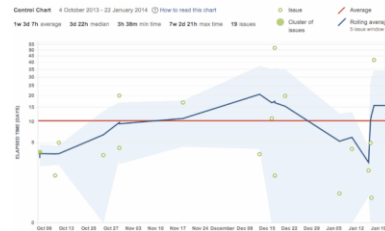
## Sales

## Marketing

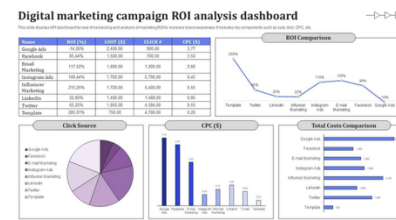
## Finance



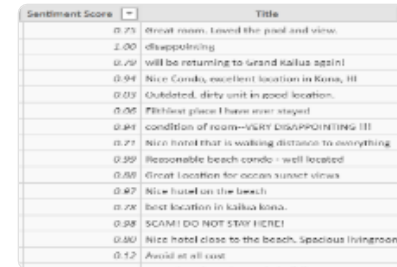
CRM Usage Rates



Lead to Close Time



Campaign ROI



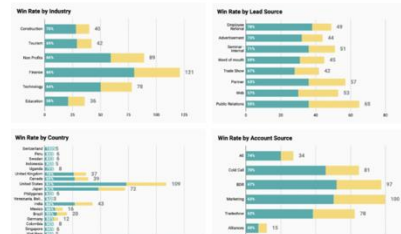
Sentiment analysis



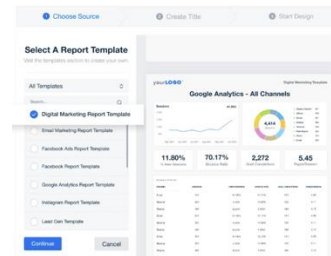
Forecast Accuracy



Quote Cycle Time



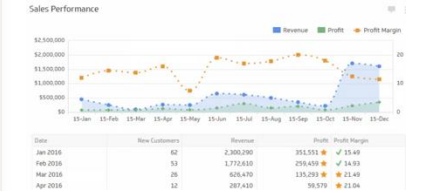
Win Rate



Content Utilization

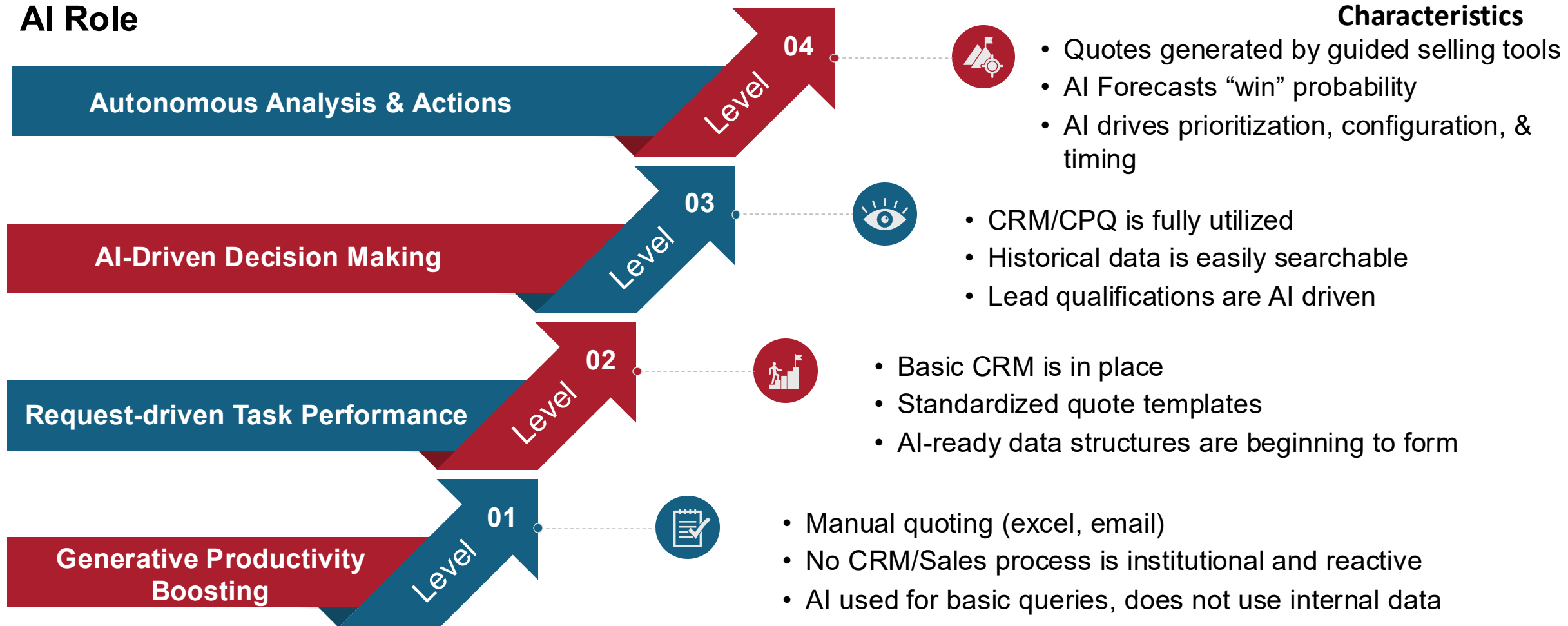


Click-Through Rates



Revenue & Margin

# What Good Looks Like



Impact

**MetalForming**  
Magazine



# Recipe for a Value Framework

## Demonstrate Art of the Possible

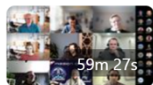
Required: M365 Copilot Art of the Possible (...)

Monday, February 3, 2025 11:30 AM - 12:30 PM

[View recap](#)

15 speakers 8 tasks

[Transcript](#) +7



59m 27s

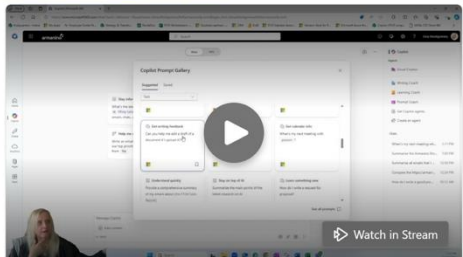
Set to expire

## Stimulate User Activity

Space Training Module - Copilot Chat

Greetings Cohort 2 - The Navigators! Here's another assigned space training module for Launch Week on Copilot Chat!! Please watch-try-comment/react for participation credit. Happy exploring!

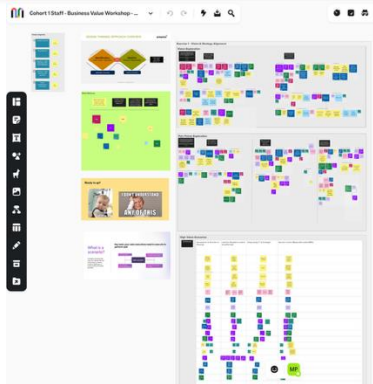
[Copilot in Business Chat - Overview.webm](#)



Copilot in Business Chat - Overview.webm

ArmaninosM365CopilotCosmicAdventure > Reference Materials

## Conduct Business Value Workshops



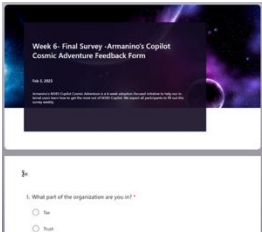
## Define Use Case Backlog

Use Case ID	Use Case Description	Priority	Status
UC001	Implement a new feature for the application.	High	In Progress
UC002	Optimize the performance of the application.	Medium	Not Started
UC003	Integrate with a third-party service.	Low	Not Started
UC004	Improve the user interface.	High	In Progress
UC005	Implement a new reporting feature.	Medium	Not Started
UC006	Optimize the database performance.	Low	Not Started
UC007	Implement a new security feature.	High	In Progress
UC008	Improve the application's scalability.	Medium	Not Started
UC009	Integrate with a new payment gateway.	Low	Not Started
UC010	Implement a new analytics feature.	High	In Progress

## Measure Usage & Sentiment

Mission Accomplished! Final Mission Status Report Due Today!

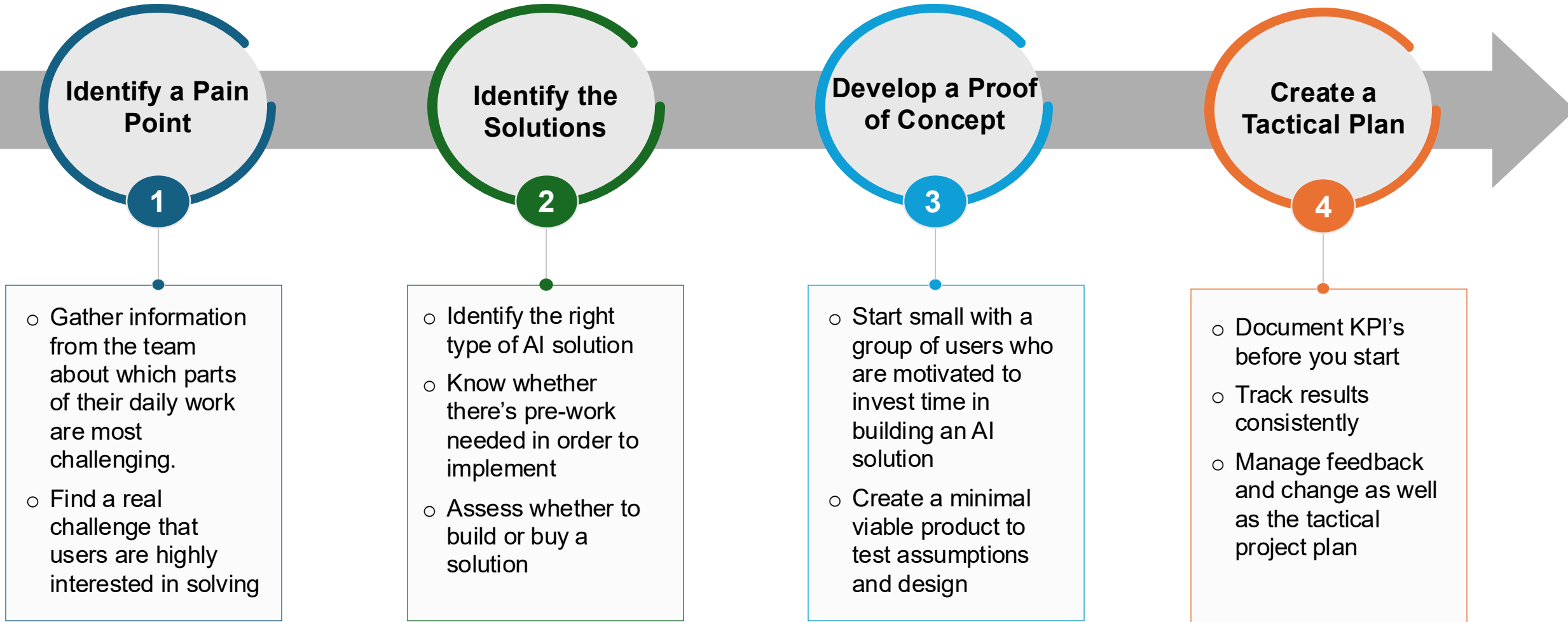
Cohort 1 - The Pathfinders you did it! Please take a moment today to fill out your final mission status report survey by end of day. Your feedback is critical! Thank you for your follow through in our Cosmic Adventure!  
<https://forms.office.com/r/ZKZbJH15p5>



## Analyze and Associate



# Next Steps



# Thank You!

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