Advanced Sales Automation and Technology Integration Training Course



26 - 30 Oct 2026

Geneva

5900 € (Per Person)

Ref: #SAL6604_129880

Course Introduction / Overview:

This course provides a comprehensive roadmap for transforming sales operations through the strategic implementation of automation and technology. In today's competitive landscape, simply having a CRM is no longer enough. Success hinges on creating a seamlessly integrated ecosystem of tools that empowers sales teams, enhances customer engagement, and drives predictable revenue growth. This program moves beyond basic tool tutorials to focus on the strategic framework required to select, implement, and optimize a modern sales technology stack. We will explore the principles championed by thought leaders like Aaron Ross in his influential book, "Predictable Revenue," which revolutionized how businesses approach sales development through process and technology. Participants will learn to automate repetitive tasks, enabling their teams to focus on high-value activities like building relationships and closing deals. At BIG BEN Training Center, we have designed this curriculum to equip professionals with the skills to architect data-driven sales processes, align sales and marketing efforts, and accurately measure the return on investment of their technology initiatives, ensuring sustainable growth and a significant competitive advantage.

Target Audience / This training course is suitable for:

- Sales Directors and VPs of Sales.
- Sales Managers and Team Leaders.
- Sales Operations and Revenue Operations (RevOps) Professionals.
- Business Development Managers and Representatives.
- Account Executives and Account Managers.
- Marketing Managers involved in lead generation.
- Entrepreneurs and Small Business Owners.
- IT Professionals supporting sales systems.

Target Sectors and Industries:

- Technology and Software as a Service (SaaS).
- Financial Services and Insurance.
- Telecommunications.
- Real Estate and Property Development.
- Manufacturing and Engineering.
- Professional Services and Consulting.
- Retail and E-commerce.
- Healthcare and Pharmaceuticals.
- Governmental and public sector agencies.

Target Organizations Departments:

- Sales Department.
- Marketing Department.
- Business Development Department.
- Sales Operations.
- Revenue Operations (RevOps).
- Customer Success and Account Management.
- Information Technology (IT).
- Executive Management.

Course Offerings:

By the end of this course, the participants will have able to:

- Develop a strategic framework for evaluating and selecting sales technology.
- Design and implement a cohesive and integrated sales technology stack.
- Automate key stages of the sales pipeline from lead generation to closing.
- Master advanced CRM functionalities for pipeline management and reporting.
- Integrate marketing automation platforms with CRM systems for seamless lead nurturing.
- Utilize AI-powered tools for predictive lead scoring and sales forecasting.
- Create automated workflows to enhance sales team productivity and efficiency.
- Analyze sales data to make informed, strategic decisions.
- Develop a change management plan to drive user adoption of new technologies.
- Calculate and demonstrate the return on investment (ROI) of sales automation initiatives.

Course Methodology:

The training methodology at BIG BEN Training Center is designed to be highly interactive, practical, and results-oriented. We believe that adult learning is most effective when it combines theoretical knowledge with hands-on application. This course moves beyond traditional lectures to create an immersive learning environment. Sessions will feature a blend of expert-led presentations, in-depth case study analyses of successful technology implementations, and interactive group discussions where participants can share challenges and best practices. A significant portion of the course is dedicated to practical workshops and simulation exercises, allowing participants to work with templates for building a tech stack, designing automation workflows, and creating ROI models. Technology demonstrations will provide a clear view of how different tools function and integrate. Continuous feedback is a core component, with peer-to-peer reviews and expert coaching to help refine strategies. This blended approach ensures that participants not only understand the concepts but also leave with the confidence and practical skills to implement them immediately within their own organizations.

Course Agenda (Course Units):

Unit One: Foundations of Modern Sales Technology

- The evolution of the sales process in the digital age.
- Defining sales automation, sales enablement, and sales operations.
- Core benefits of technology integration for revenue growth.
- Understanding the modern buyer's journey and technology's role.
- Mapping your existing sales process to identify automation opportunities.
- Common pitfalls in sales technology adoption and how to avoid them.
- Aligning sales technology strategy with overall business objectives.

Unit Two: Architecting the Optimal Sales Tech Stack

- Conducting a needs analysis for your sales organization.
- Categorizing sales tools: CRM, engagement, intelligence, and analytics.
- The central role of the Customer Relationship Management (CRM) system.
- Evaluating and selecting the right vendors for your needs.
- Principles of seamless API integration between different platforms.
- Budgeting for your sales tech stack and calculating total cost of ownership.
- Building a phased implementation roadmap for your organization.

Unit Three: Mastering CRM and Core Automation Workflows

- CRM best practices for data hygiene and user adoption.
- Automating lead capture, distribution, and initial follow-up.
- Designing effective email and communication cadences.
- Automating pipeline management and deal stage progression alerts.
- Workflow automation for tasks, reminders, and internal notifications.
- Generating automated sales reports and dashboards for performance tracking.
- Personalization at scale using dynamic content and data triggers.

Unit Four: Leveraging AI and Data Analytics for Sales Growth

- Introduction to Artificial Intelligence (AI) and Machine Learning in sales.
- Implementing predictive lead and opportunity scoring models.
- Using AI for sales forecasting and identifying at-risk deals.
- Leveraging sales intelligence platforms for automated prospecting.
- Analyzing sales activity data to identify winning behaviors.
- The role of conversation intelligence tools in coaching and training.
- Building a data-driven culture within the sales team.

Unit Five: Driving Adoption, Measuring ROI, and Future-Proofing Sales

- Principles of change management for new technology rollout.
- Developing effective training programs for the sales team.
- Creating a playbook for consistent use of the sales tech stack.
- Key performance indicators (KPIs) for measuring technology impact.
- Building a business case and calculating the ROI of your investments.
- The future of sales technology: trends in AI, VR, and hyper-personalization.
- Developing a continuous improvement cycle for your sales processes and tools.

FAQ:

Qualifications required for registering to this course?

There are no requirements.

How long is each daily session, and what is the total number of training hours for the course?

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

Something to think about:

As AI-driven sales automation becomes ubiquitous, what uniquely human skills will become most critical for sales professionals to cultivate, and how can technology be used to enhance, rather than replace, those skills?

What unique qualities does this course offer compared to other courses?

This course distinguishes itself by adopting a strategic, process-oriented perspective rather than focusing narrowly on the features of specific software. While many programs offer tutorials on individual tools, this training provides a holistic framework for architecting, implementing, and managing an entire sales technology ecosystem that aligns with core business objectives. We emphasize the "why" behind the technology—the strategic imperatives that drive tool selection and integration. A significant focus is placed on the often-neglected aspects of change management and user adoption, recognizing that the most powerful technology is useless if the team does not embrace it. Furthermore, the curriculum is built around the crucial concept of measuring and proving the return on investment (ROI), equipping participants with the financial and analytical skills to justify technology expenditures to executive leadership. By integrating principles of sales process engineering with advanced topics like AI-powered analytics and predictive modeling, this course prepares participants not just to use technology, but to become strategic leaders who can leverage it to build a sustainable competitive advantage and drive predictable revenue growth.