



ETHICAL AI. ACTIONABLE RESULTS.

Prompting AI for Revenue Teams

Ten prompting patterns and five working plays for sales and marketing, built for ChatGPT, Claude, and Gemini alike.

Sales and marketing teams were the first to adopt AI and are among the first to be disappointed by it. The pattern is consistent. Someone asks for a cold email, gets something that sounds like every other cold email, and concludes the tool cannot do the job.

The tool can do the job. The instruction is the problem. This guide covers ten patterns that hold up across every major model, then five plays your team can run on Monday: prospect research, account planning, competitive analysis, messaging, and campaign build.

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INSIDE

Ten patterns, each with a sales or marketing example you can copy.

THEN

Five full plays, written out and ready to paste.

FINALLY

The prompting advice that has quietly stopped working.

The Ten Patterns

These names are practical categories rather than official terminology. The examples are written for revenue work, but the patterns behave the same way in every major model.

#	PATTERN	WHAT IT DOES	SALES AND MARKETING EXAMPLE
1	Direct Instruction	States exactly what you want done. Best for straightforward tasks.	<i>"Summarize this discovery call in five bullets a sales VP can read before the next meeting."</i>
2	Role / Persona	Gives the model a buyer's perspective or a functional role.	<i>"Act as a skeptical VP of Operations at a 400-person manufacturer. React to this cold email."</i>
3	Context, Task, Constraints, Output	Background, objective, boundaries, and the deliverable. The best all-purpose structure for revenue work.	<i>"Context: We sell ERP to mid-market manufacturers. Task: Build a prospecting campaign. Constraints: Midwest, \$50M to \$500M revenue, no cold calling. Output: A five-touch sequence."</i>
4	Few-Shot / Example	Shows the model what your voice sounds like. The fastest fix for generic output.	<i>"Here are three subject lines that beat our benchmark. Write ten more in the same voice."</i>
5	Decomposition	Breaks a complicated problem into stages instead of asking for everything at once.	<i>"First list the buying committee roles. Then the objection each one raises. Then a one-line answer to each."</i>
6	Iterative / Conversational	Improves output through successive prompts rather than one enormous perfect prompt.	<i>"Good. Cut it 30 percent. Now rewrite it for a CFO. Now flag every claim we cannot prove."</i>
7	Critique and Improve	Has the model evaluate the work before revising it. The highest-leverage habit on this page.	<i>"Score this proposal 1 to 10 on clarity, credibility, differentiation, and executive appeal. Then rewrite the two lowest sections."</i>
8	Comparative / Multi-Perspective	Forces consideration of every seat at the table instead of the first plausible answer.	<i>"Analyze this renewal risk from the perspectives of the champion, the CFO, the end user, and the incumbent competitor."</i>
9	Rubric / Criteria-Based	Defines how the answer will be judged before the model starts. Makes scoring repeatable.	<i>"Score these 40 inbound leads on fit, urgency, budget signal, and champion strength. Weight the criteria and rank the top ten."</i>
10	Grounded / Source-Constrained	Requires the model to answer only from supplied documents or data. Keeps forecasts honest.	<i>"Using only the attached transcript and CRM notes, list what the customer actually said about timeline, budget, and competition. Cite the line."</i>

Five Plays You Can Run This Week

Each play combines two or three of the patterns above. Replace the bracketed fields with your own accounts and paste the whole block. Longer prompts are not worse prompts.

1 Prospect Research

Replaces the 20 minutes a rep spends assembling a picture of an account before a first call. Ground it in real sources so it does not invent a strategy the company never announced.

```
Context: I sell workforce scheduling software to multi-site healthcare
        systems.
Task:    Brief me on [COMPANY] before a first call with their COO.
Source:  Use only the attached 10-K excerpt, their careers page,
        and the two press releases below.
Output:  Six bullets on what they are trying to fix, three hiring
        signals, two likely internal objections, and one opening
        question. Mark anything you inferred rather than read.
```

2 Account Planning

Turns a single-threaded opportunity into a mapped buying committee. The multi-perspective pass is what surfaces the objection your champion will never say out loud.

```
Here are my notes on an open opportunity at [ACCOUNT].

First, map the buying committee: who signs, who blocks, who uses it.
Second, for each role, state their success metric and their risk.
Third, rank the deal risks by likelihood and by damage.
Fourth, give me the three actions that most reduce total risk.

Where my notes are silent, say so instead of guessing.
```

3 Competitive Analysis

The rubric is the whole point. Define the criteria before the model starts, or you get a summary of whoever has the better marketing copy.

```
Compare us against [COMPETITOR A] and [COMPETITOR B] for a 500-seat distribution company.
```

```
Criteria: total cost over three years, implementation effort, integration depth, security posture, support model, and roadmap risk.
```

```
Weight each criterion for this buyer, score all three vendors, and explain where we genuinely lose. Do not soften the losses.
```

4 Sales Messaging

Few-shot fixes the voice. Critique-and-improve fixes the substance. Run them in that order.

```
Here are three emails that got replies from operations leaders.  
[PASTE THREE]
```

```
Write a fourth for a VP of Supply Chain at a food manufacturer who just announced a new distribution center. Same voice, under 120 words, one question at the end.
```

```
Then critique your own draft as that VP. What would make you delete it in three seconds? Rewrite it to survive that test.
```

5 Campaign Creation

Give the model the constraints your marketing plan actually has. Budget, channel, and offer limits are what turn a generic campaign into an executable one.

```
Context: Mid-market ERP, 11-person marketing team, no SDRs.
```

```
Task: Build a Q4 demand campaign for manufacturing ops leaders.
```

```
Constraints: $40K total, LinkedIn and email only, one gated asset, six-week run, legal review takes ten days.
```

```
Output: A week-by-week plan, the asset, five ad variants, three email subject lines, and the two metrics that tell us by week three whether to kill it.
```

What Has Quietly Stopped Working

Most of the prompting advice circulating in sales enablement decks is a few years old, and some of it has aged out.

"You are the world's greatest copywriter."
"Take a deep breath."
"Think step by step."

These were workarounds for models that needed the nudge. Newer models largely do this on their own, and the phrasing no longer earns its space. What moves output now is context, constraints, examples, and stated criteria for judging the answer. OpenAI, Google, and Anthropic all publish a version of the same guidance.

One difference is worth knowing. Claude and Gemini both respond well to explicit structural markers, such as XML-style tags or Markdown headers separating your context from your instruction. ChatGPT is comfortable with conversational phrasing and iterative refinement. Teach your team one method rather than three, then let people add the structure their preferred tool likes.

Train Your Revenue Team

IndyLogic Technologies works with CEOs, CROs, and marketing leaders at mid-market companies on where AI belongs in the revenue function and where it does not. AI that works for people, not instead of them.

AI Working Session. A half-day on site for up to six people from your sales and marketing teams. We build two or three of your real workflows live. You leave with working automations in your own tools, a one-page runbook for each, and a ranked list of what to build next.

AWOS, the AI Workflow Opportunity Sprint. A fixed-scope engagement producing a clear Go, No Go, or Delay decision on your AI investments. Compensation is the same either way, so the recommendation is not for sale.

Book a 30-minute conversation: calendly.com/tobyreeves



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