

Sell Business Transformation

AI sales reps: Start with workflows, not technology

by: Kristal Cook, RockRoot & ETHERFAX

If you ask 10 different customers what they think about artificial intelligence (AI), you will probably get 10 different answers. Some picture terrible AI-generated artwork. Others think about students using ChatGPT to write papers. Some worry because they have heard that AI “hallucinates.” Some immediately think about layoffs. Others use AI every day and love it. Many people are already using AI without even realizing it. This is the challenge.

When you are selling print management, document management, cloud fax or cybersecurity, customers usually begin with a business problem. They want to reduce print costs, improve security or eliminate inefficient processes. But AI is different. Before you ever walk into a meeting, your customer already has an opinion — and that opinion is often based on headlines, social media or consumer AI tools rather than the business problem your solution is actually designed to solve.

As an industry, I believe we are making a mistake when we lead those conversations by talking about AI. Customers do not buy AI. They buy business transformation. They buy faster workflows, better customer experiences, fewer bottlenecks, happier employees and organizations that operate more efficiently. AI is simply the technology that helps deliver those outcomes.

That means the traditional software sales process needs to evolve. For years we have asked questions like: “How many printers do you have?” “How many users?” or “How many faxes do you send?” Those questions still matter for traditional software, but they rarely uncover the opportunity for AI. Instead, ask questions that reveal how work actually gets done: “Walk me through yesterday. What starts the process? Who touches the information first? Who touches it next? Where does work stop? What creates delays? Where do mistakes happen? If you could eliminate one repetitive task tomorrow, what would it be?”

The answers will reveal something far more valuable than technical requirements. They reveal friction. And friction is where AI creates value.

Customers do not wake up wishing they had more AI.



They wake up frustrated because information sits in inboxes, approvals take too long, employees manually enter the same information into multiple systems and customers wait while paperwork moves its way through the organization. Those are the problems worth solving. You are not selling AI. You are selling fewer bottlenecks, faster service and a better day at work.

One of the biggest mistakes I see salespeople make is demonstrating features before helping customers imagine a better future. Once you have mapped today’s workflow, paint tomorrow’s workflow. Instead of explaining what the software does, describe what your customer’s day could look like:

- Information arrives and is automatically recognized
- Relevant data is extracted
- Documents are classified and routed to the right person or system
- Employees begin their mornings with work already organized instead of waiting in stacks, inboxes or queues

Instead of moving paperwork, they are helping customers, solving problems, improving communication and completing work that requires human judgment. That is the sale — not artificial intelligence, but a better workday.

Another misconception we need to overcome is the fear that AI exists to replace people. I do not believe that is the conversation our industry should be having. AI should remove repetitive work, not meaningful work.

Think about your best employee. Would you rather have him (or her) sorting documents, entering data, checking

statuses and routing paperwork all day, or would you rather have him building relationships, solving customer problems and helping your business grow?

A great example comes from IKEA. After deploying an AI chatbot that successfully handled routine customer inquiries, the company retrained approximately 8,500 customer service employees to become AI-assisted interior design advisors. AI did not replace those employees.

It removed repetitive work so they could spend more time creating value for customers. That is the opportunity AI creates when it is implemented thoughtfully.

This is why I often encourage customers to think of AI as a digital teammate rather than a replacement. A digital teammate never gets tired of repetitive administrative work. It quietly handles routine tasks so people can focus on work that requires creativity, empathy, experience and decision making. When customers begin seeing AI this way, the conversation shifts from fear to opportunity.

One company embracing this philosophy is ETHERFAX, with its new AI-powered workflow platform, Flow. What I appreciate about Flow's approach is that it does not begin with the technology — it begins with the workflow. Flow is designed to understand incoming documents, recognize their context, extract meaningful information, classify them and move them through the appropriate business process. In health care, that could mean accelerating referral intake, routing documentation to the correct department or reducing the administrative burden that delays patient care. The technology is impressive, but the real story is what happens after repetitive document work disappears. Employees spend less time processing paperwork and more time serving patients, solving problems and delivering better experiences.

As AI continues to enter the office technology channel, I

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believe those who succeed will not necessarily be the ones presenting long lists of features or giving the most technical demonstrations. They will be the ones who ask better questions, understand their customers' businesses, uncover workflow challenges and help organizations imagine what becomes possible when technology removes the tedious work people were never meant to spend their days doing.

The future of our industry will not be determined by who has the best AI. It will be determined by who is best at helping customers transform the way work gets done. ■

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RockRoot offers a "Virtual Solutions Director" package for dealers who would like to bring a software veteran on board to help them drive software growth. If you would like training and alignment for your current leadership, RockRoot offers a software sales growth course with a workbook to create a tangible, actionable plan to implement, and includes coaching sessions. She can be reached at kcook@rockroot.biz.

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