The GenAI Imperative for Telco B2B Sales Teams

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Our diverse, global teams bring deep industry and functional expertise and a range of perspectives that question the status quo and spark change. BCG delivers solutions through leading-edge management consulting, technology and design, and corporate and digital ventures. We work in a uniquely collaborative model across the firm and throughout all levels of the client organization, fueled by the goal of helping our clients thrive and enabling them to make the world a better place.

Salesforce is the #1 AI CRM for Communications. Salesforce for Communications enables service providers to find more prospects, close more deals, deliver services more rapidly, and serve customers more efficiently by connecting with customers in a whole new way.

Salesforce brings together all your data, from any source. Salesforce for Communications, powered by Einstein 1, unites your marketing, sales, commerce, delivery, service, and IT teams with a single, shared view of customer information - at scale. With Communications Cloud, an asset-based, catalog-driven, modular solution built on industry standards, you can further spur growth and reduce costs with industry specific functions like churn predictions, order management and pricing and product designer. With artificial intelligence embedded within our platform and apps, Salesforce helps augment everyone in your company to work more productively and better deliver the personalized experiences customers love.
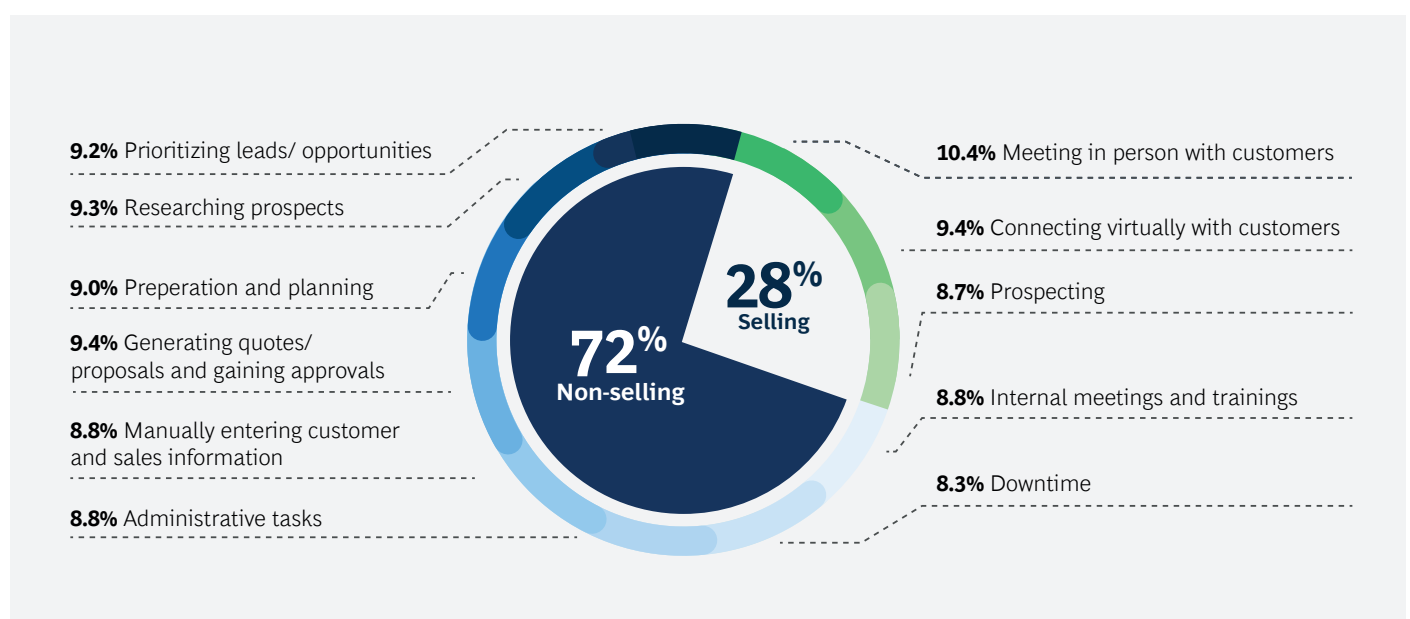
The GenAI Imperative for Telco B2B Sales Teams

The future—in the form of both predictive and generative artificial intelligence (AI)—is calling communications service providers. In every conversation with customers, partners, and industry analysts, we have heard how excited telco B2B sales teams are to embrace the new era of data, predictive AI, and now generative AI. They're so eager that sales ops teams are even reinventing their role as AI ops. It's clear that AI could energize service providers and help them deliver the true potential for their customers and experience accelerated growth themselves. Harnessing the technology's power, however, is a journey that requires a progressive approach that generates value at each incremental step. Many have started that journey but have yet to harness its full potential.

Transforming an organization to take advantage of AI/GenAI will leverage data, advanced technology, infrastructure, and human interaction to create powerful end-to-end sales processes. Harnessing this, we see a total value potential for telco operators of 40 percent to 70 percent uplift in EBITDA from driving both top-line growth and bottom-line efficiencies.

The telco industry, like utilities and other mature industries, faces a fundamental challenge: growing their business while accelerating cost optimization and initiatives to find economies of scale. This is particularly true in the B2B sector, where administrative tasks take up the bulk of sales representatives' time, the catalog of products is increasingly complex, and legacy applications are clogging the system—frustrating reps and customers alike. In BCG's view, transforming the organization and its ways of working, supported strongly by developing and deploying AI and GenAI, presents the best, perhaps the only, viable path for organizations that want to break out of their stasis and generate positive momentum.

Even if organizations are beginning to employ AI/GenAI in some of their operations, its deployment among sales professionals is often very much suboptimal (see Exhibit 1).

Exhibit 1 – How sales reps spend their time

9.2% Prioritizing leads/ opportunities

9.3% Researching prospects

9.0% Preperation and planning

9.4% Generating quotes/ proposals and gaining approvals

8.8% Manually entering customer and sales information

8.8% Administrative tasks

28% Selling

72% Non-selling

10.4% Meeting in person with customers

9.4% Connecting virtually with customers

8.7% Prospecting

8.8% Internal meetings and trainings

8.3% Downtime

Source: State of Sales, 5th ed. report, Salesforce.com 2022

Sales reps spend 72 percent of their time on administrative and non-selling tasks, including prioritizing leads, researching prospects, and planning. BCG and Salesforce have designed and deployed several scenarios demonstrating how combining different types of AI can transform B2B sales for telcos.
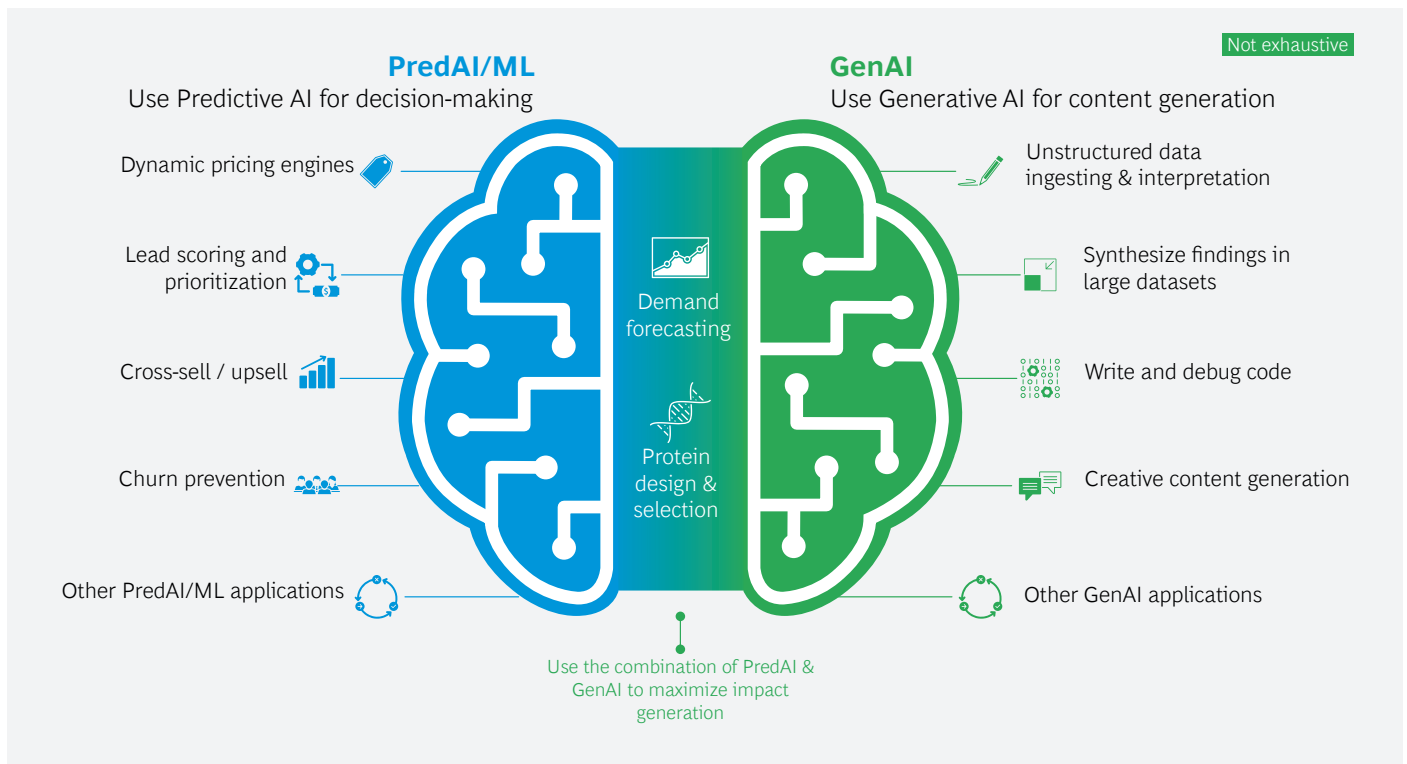
Leveraging these technologies and properly integrating them into sales processes will drive productivity by automating or accelerating many steps. Predictive AI analyzes and evaluates information, and GenAI synthesizes information and relays original output in natural language—creating, for instance, an interactive engine to understand solution options for specific customer needs (see Exhibit 2).

The unique characteristic of GenAI, which is based on powerful large language models (LLM), is its ability to synthesize data that was input or extracted from unstructured data -i.e. data that is typically categorized as qualitative data, does not have a predefined data model, and cannot be processed and analyzed via conventional data tools and methods. GenAI can then generate original data in different formats—text, images, sound, etc. GenAI platforms trained in text, such as ChatGPT, Cohere, Anthropic, etc. can "understand" conversational prompts and create original text, a complementary genre of output than, say, predictive forecasting or recommendations based on crunching years of behavioral data (see Exhibit 3).

Our vision for AI-assisted sales

How well organizations integrate such AI models in the day-to-day of their employees and their customer engagements is the key to success. Most clients we have worked with over-index on the wrong elements, severely underestimating the change effort required. Based on numerous deployments in different industries, we are convinced that three factors are critical to success:

Exhibit 2 - PredAI and GenAI need to be combined to drive new frontiers and accelerate existing applications

PredAI/ML
Use Predictive AI for decision-making

- Dynamic pricing engines
- Lead scoring and prioritization
- Cross-sell / upsell
- Churn prevention
- Other PredAI/ML applications

Demand forecasting

Protein design & selection

GenAI
Use Generative AI for content generation

- Unstructured data ingesting & interpretation
- Synthesize findings in large datasets
- Write and debug code
- Creative content generation
- Other GenAI applications

Not exhaustive

Use the combination of PredAI & GenAI to maximize impact generation

Source: BCG Analysis

- 70 percent of the success revolves around processes and people: business process reinvention, adoption at scale within the organization (which increases dramatically if the "why" is clear behind the prediction), change (which requires the sponsorship and buy-in of leaders), and rewiring the operating model. Equally important are well-defined business objectives. Introducing new platforms without prioritizing the desired high-value, scalable business outcomes, or simply using them for isolated applications, would vastly under-exploit their potential for business transformation.

- A much smaller amount—20 percent—will be directly related to the technology stack and foundations to make it work: model infrastructure, machine learning operations (MLOps), data quality assurance, architecture design, app integration, and leveraging digital platforms in the cloud, especially for their business support system (BSS) stack.

- Finally, 10 percent can be linked to the most disruptive technological advancements: GenAI and AI/ML models (see Exhibit 4).
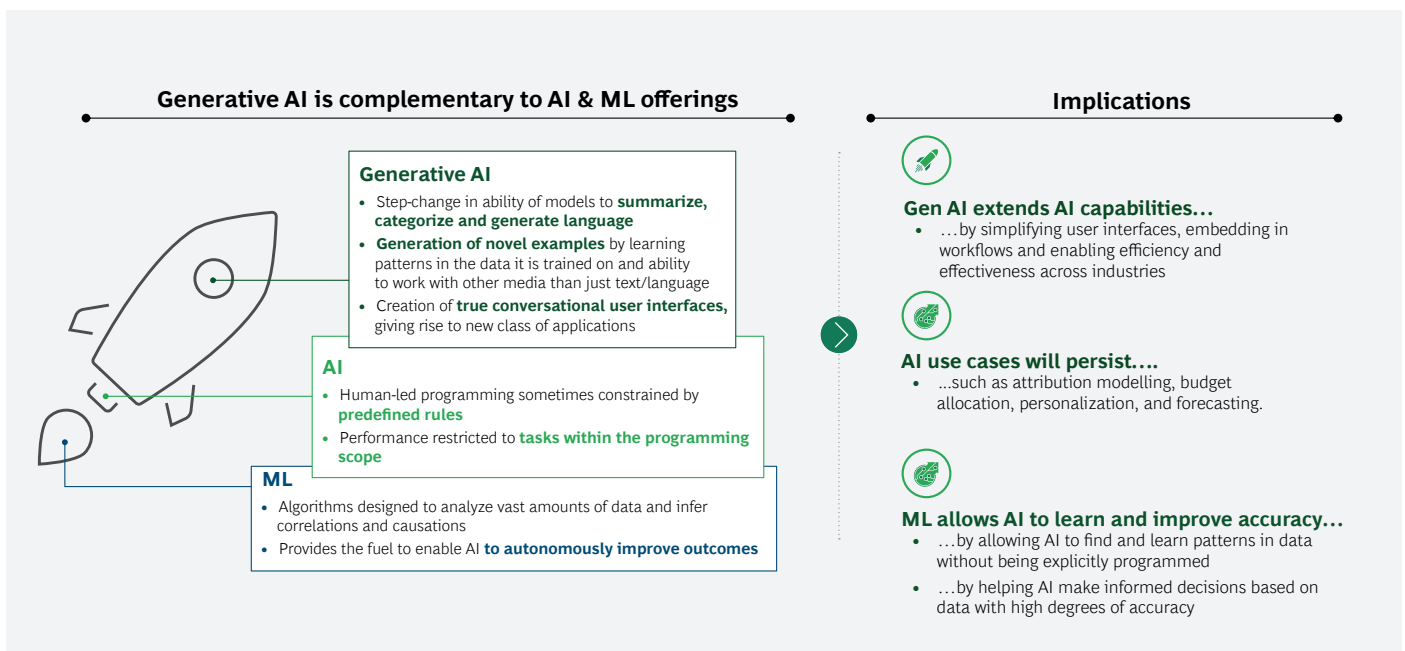
How to realize the value of AI

To make this tech-enabled organizational transformation a reality, organizations need to actively consider their readiness and willingness to embark on this journey.

We understand that companies have different horizons in terms of their readiness to deploy AI tools. We see three distinct horizons to choose from, advancing in maturity while implying a greater need for transformational change and shift in the go-to-market strategy and customer engagement.

1. **Task automation and augmentation.** Easier to realize, enhancing the business as usual with tools, often out of the box from vendors, that speed and improve the process, such as automating call summaries, generating targeted customer insights and emails, updating CRM records, etc. Leveraging just these capabilities would allow sales teams to gain substantial productivity already, addressing mostly their non-selling time.

Exhibit 3 – GenAI will not replace AI, but rather seamlessly incorporate it to improve enterprise capabilities across the value chain…

Generative AI is complementary to AI & ML offerings

Generative AI
- Step-change in ability of models to **summarize, categorize and generate language**
- **Generation of novel examples** by learning patterns in the data it is trained on and ability to work with other media than just text/language
- Creation of **true conversational user interfaces,** giving rise to new class of applications

AI
- Human-led programming sometimes constrained by **predefined rules**
- Performance restricted to **tasks within the programming scope**

ML
- Algorithms designed to analyze vast amounts of data and infer correlations and causations
- Provides the fuel to enable AI **to autonomously improve outcomes**

Implications

Gen AI extends AI capabilities…
- …by simplifying user interfaces, embedding in workflows and enabling efficiency and effectiveness across industries

AI use cases will persist….
- …such as attribution modelling, budget allocation, personalization, and forecasting.

ML allows AI to learn and improve accuracy…
- …by allowing AI to find and learn patterns in data without being explicitly programmed
- …by helping AI make informed decisions based on data with high degrees of accuracy

Source: Forbes; BCG analysis

2. Reimagined individual workflows. Reshape end-to-end solutions for sales agents. Typical outcomes include lead outreach and qualification, quote updates, approval processes, or the automated creation of proposals, hence unlocking revenue upsides and competitive advantages from time to market.
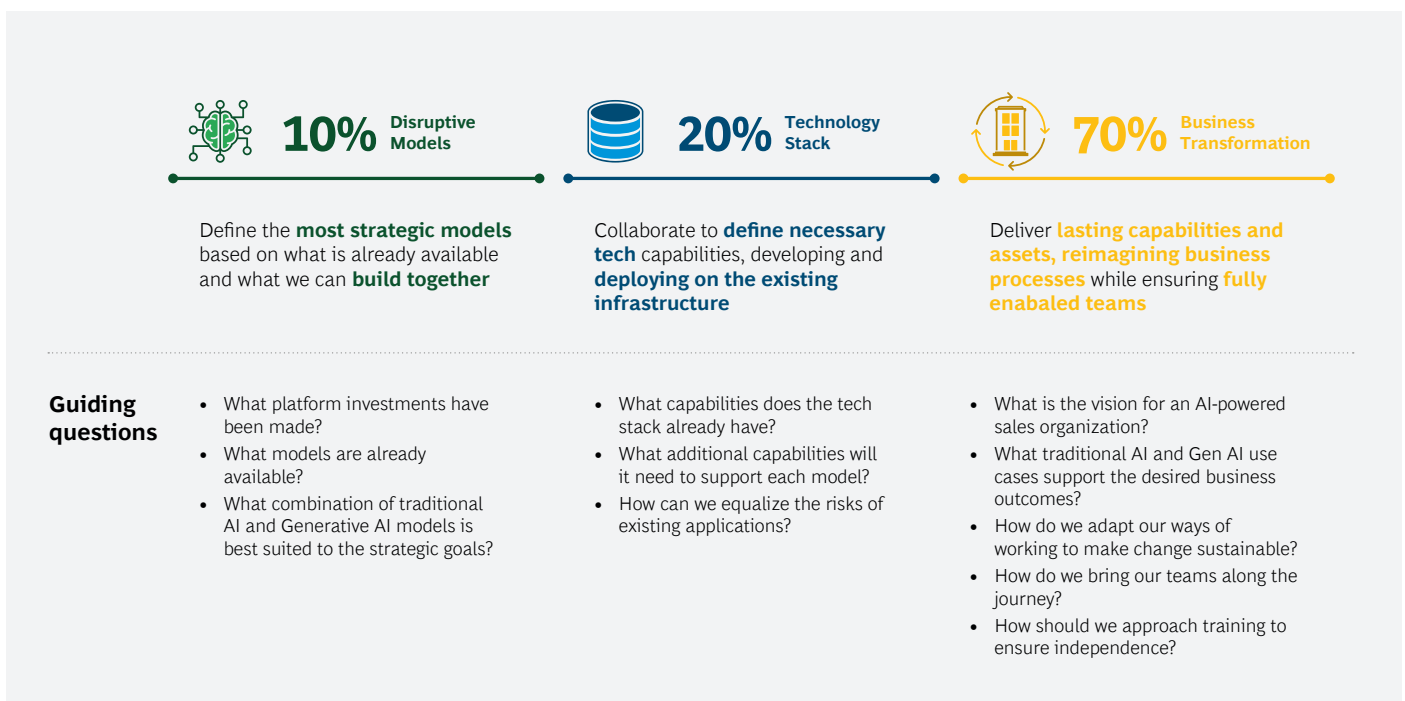
3. Transformational change. This represents a fundamental shift in sales motions and how the telco interacts with its customers. It requires the organization to adopt new ways of working, undertake complete end-to-end redesign of processes crossing different departments, and orchestrating across solutions that span many systems in their architectural landscape, leveraging both structured and unstructured data (see Exhibit 5).

The outcome will enable processes to be executed at hyper speed and will create a new type of empowered sales agent. An end-state vision is a no-touch sales process with minimal human oversight, digitized end-to-end and driving quality engagements across the funnel: the GenAI seller.

Managing the change effort across all of these horizons unlocks the true value of AI/GenAI. To guide this effort, the following key principles have helped organizations embark on this journey and make it a success:

- Set the top-down vision and ambition

- Simplification. The goal is to create simple, consistent, and seamless experiences for the clients, the employees, and the partner ecosystem

- Choose a "lighthouse" use case. Stronger focus on value creation from day one

- Drive rapid organizational change while nurturing a sense of opportunity

- Embed analytics into the operating model and incentivize adoption

- Human-Centered AI (creating AI systems that amplify and augment rather than displace human abilities)

Exhibit 4 - We can help you to deliver…

10% Disruptive Models

20% Technology Stack

70% Business Transformation

Define the **most strategic models** based on what is already available and what we can **build together**

Collaborate to **define necessary tech** capabilities, developing and **deploying on the existing infrastructure**

Deliver **lasting capabilities and assets, reimagining business processes** while ensuring **fully enabaled teams**

Guiding questions

- What platform investments have been made?
- What models are already available?
- What combination of traditional AI and Generative AI models is best suited to the strategic goals?

- What capabilities does the tech stack already have?
- What additional capabilities will it need to support each model?
- How can we equalize the risks of existing applications?

- What is the vision for an AI-powered sales organization?
- What traditional AI and Gen AI use cases support the desired business outcomes?
- How do we adapt our ways of working to make change sustainable?
- How do we bring our teams along the journey?
- How should we approach training to ensure independence?

Source: BCG Analysis

Salesforce and BCG customer stories

BCG and Salesforce have launched numerous AI/GenAI initiatives and projects for customers in every industry and in all domains, with a goal to experiment, bring value, and augment sales and customer operations. We are starting to collect great stories and lessons learned, as illustrated in these four B2B comms, media, and high-tech examples.

Salesforce reference clients	AI transformation project	Metrics
Tier-1 Telco operator in EMEA; comms industry, B2C & B2B	Einstein Copilot in local language of FAQ for employees, including 1,800 articles	• Deployed in few weeks • Time-saving • Value enhancement • Quality enhancement
Business information services leader; media industry, B2Ba	Main objective: to mine sales interactions to increase sales efficiency and revenue with Einstein, including the following business capabilities: • Summarize insights from customer calls to train reps and share feedback with the product team • Mine all sales rep interactions with the customer & summarize into key insights • Build a recommendation engine for the print business to identify customers ready for upgrades	Improved monetization of existing customer base using predictive cross-sell, up-sell models, pricing signals, and next best action
World leader in artificial intelligence computing; high-tech industry, B2B	This company relies on MuleSoft and Salesforce to combine the power of APIs and AI to drive employee productivity. It can connect back-office systems and AI to build an intuitive chatbot to allow employees to self-serve customer information for faster support. By leveraging MuleSoft for AI-related projects like the chatbot, employees can focus their energy on tasks that require more hands-on attention.	• 40% reuse rate • Developer time + asset reuse, multimillions savings

BCG reference clients	AI transformation project	Metrics
US-based provider for collaboration and communication tools; comms/hi-tech, B2B	• 3-year bot program, targeting comprehensive capability uplift across the organization; leveraging the best of BCG across while aligning incentives and putting skin in the game • Inserting data-centricity into every customer interaction, enhancing the technology stack e2e while upskilling >500 sales agents	• >6% of net recurring revenue uplift, across all customer segments from SMEs to large B2B enterprises • Uplift x-sell and upsell by +95% • Churn -40% • Price realization by +10%
Integrated US-based provider for telecommunication services	Sales acceleration through operating model transformation and AI-driven models' deployment to drive execution velocity and sales engagement in high-value deals	• 2x lead conversion rates • Reduced Priority 1 stalled deals by 70%
Integrated European-based provider for telecommunication services	Pipeline push focused on cross-selling enabled through win-rooms and AI-driven models' to drive opportunity identification and prioritization	>4% of revenue uplift

"

"We are seeing different levels of AI maturity in telco and recognize the importance of trust & security and real ROI in this cost conscious market.

Our customers are excited about the tangible business results they are seeing with our unified & composable architecture that gets enterprise AI solutions into the hands of the people who need it, right in the flow of work."
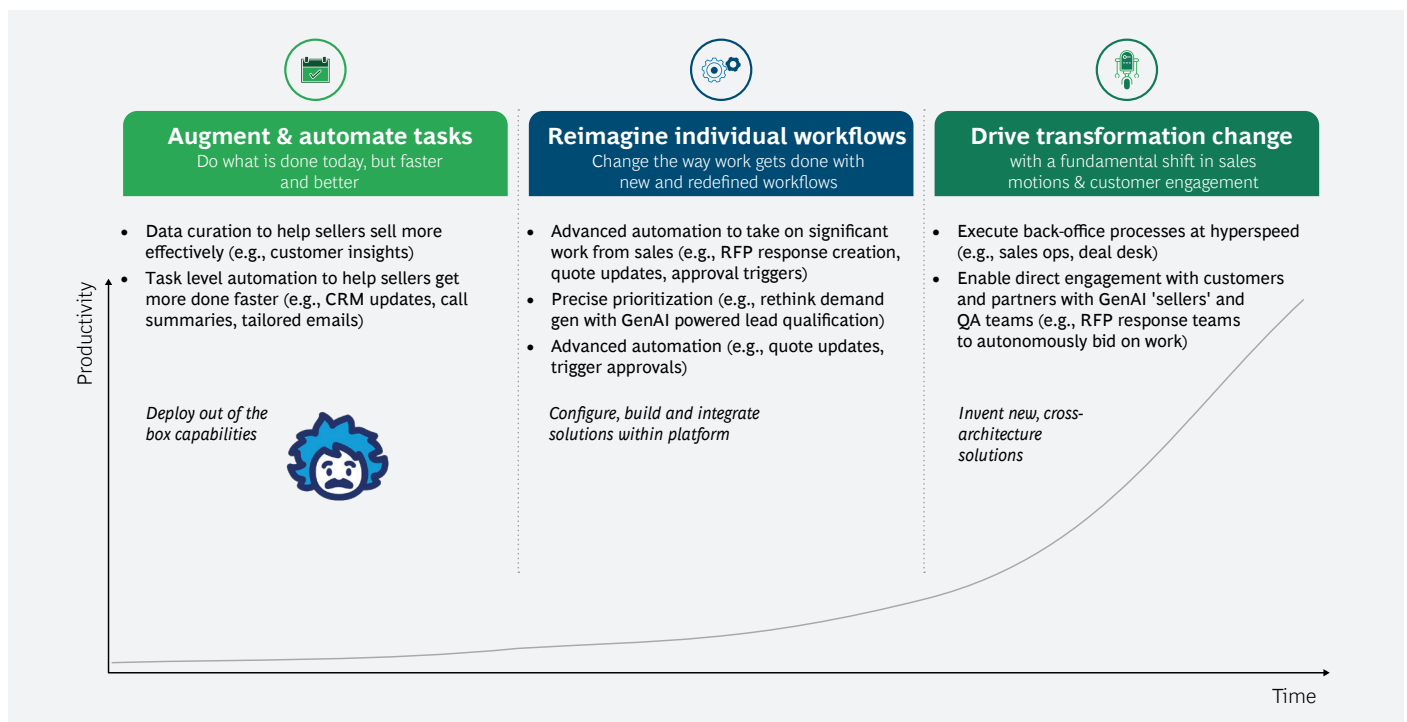
Alexa Vignone,
Executive Vice President, Salesforce

BCG's sales transformation client story

The BCG client story began when we were approached by a B2B SaaS provider with annual revenue between $1-5B. The company's desire was to become the market leader in their industry. It was suffering high monthly loses from churn and down-selling, so one goal was clearly to do better at retaining customers. We undertook an initial diagnostic and noted that the approach had room for improvement. The sales agents had only adopted existing tools in a limited way and they lacked a clear understanding of how these could deliver value for them.

The initial focus was on building the required capabilities—enhancing the platform and building AI into it, while accelerating the launch of initiatives. To implement, BCG integrated selected assets with the Salesforce.com platform's capabilities in a modular approach. Specifically, the BCG team:

- Developed the base data and infrastructure layer to support personalized account management and unlocked access to additional data sources and facilitated ingestion.

- Managed campaign and experimentation enabled by a campaign manager-optimizer—responsible for AI-based action codification, audience selection, and monitoring and measurement. In addition, this campaign manager allowed us to launch targeted experiments with new actions and enable an efficient test-learn cycle for the AI models.

- Gathered account intelligence, by building more than 15 different use cases on top of this enhanced platform, leveraging AI from cross-sell to churn prevention.

- Developed more than 10 AI targeting models whose adoption was facilitated by translating the models into natural language to build trust and improve decision-making.

Exhibit 5 - We help you to create value in the short- and long-term by identifying quick wins and by creating a roadmap to re-define workflows and business models

Augment & automate tasks
Do what is done today, but faster and better

- Data curation to help sellers sell more effectively (e.g., customer insights)
- Task level automation to help sellers get more done faster (e.g., CRM updates, call summaries, tailored emails)

Deploy out of the box capabilities

Reimagine individual workflows
Change the way work gets done with new and redefined workflows

- Advanced automation to take on significant work from sales (e.g., RFP response creation, quote updates, approval triggers)
- Precise prioritization (e.g., rethink demand gen with GenAI powered lead qualification)
- Advanced automation (e.g., quote updates, trigger approvals)

Configure, build and integrate solutions within platform

Drive transformation change
with a fundamental shift in sales motions & customer engagement

- Execute back-office processes at hyperspeed (e.g., sales ops, deal desk)
- Enable direct engagement with customers and partners with GenAI 'sellers' and QA teams (e.g., RFP response teams to autonomously bid on work)

Invent new, cross-architecture solutions

Productivity / Time

Source: Forbes; BCG analysis

- Activated channels by integrating target audiences and activating them in online channels with Salesforce Sales Cloud for Contact Centers, further enhanced by customization with BCG's Agent desktop solution.

BGC teams provided support in all domains, combining classic strategic capabilities and tech, including consultants, data scientists, engineers, and developers, among others.

From the beginning, we set a clear ambition to enable sustainable value delivery. Consequently, towards the end of our program, we shifted the joint efforts to ensure capabilities and ownership could be transferred effectively to the client's teams across its AI, tech, campaign management, and execution functions. Overall, the transformation delivered significant impact, uplifting revenue by 5-8% annually and the effective transfer allowed the client teams to maintain the performance and continue to iteratively enhance its capabilities.

Talking about the tech stack

The common thread across all discussions we have with clients, partners, and industry analysts about the new era of data and AI is concern about tech stack consolidation—not just about trimming costs, but about accelerating productivity and unleashing growth.

As the case studies above show, the list of ingredients necessary for successful transformation starts with data. We know that AI is only as knowledgeable as the data it's grounded on. Many customers tell us that to fully leverage AI, they need and want a single platform. Point solutions atop the CRM create siloed data pockets that increase risk, duplicate capabilities, reduce seller productivity, and increase costs.

AI is the next ingredient. A solid data foundation built in one CRM ensures that predictive and generative AI bring real productivity gains. AI can automate emails, take actions, and create account summaries based on CRM context—or tell your sales agents which products are ripe for cross-selling opportunities. The possibilities are just beginning to be understood.

The number one goal is securing the AI architecture. That requires a trust layer, natively built into the platform, with strong components to support data residency and compliance. As an example, the Salesforce Einstein Trust Layer is equipped with security guardrails (see Exhibit 6).

Exhibit 6 - Salesforce's Trust layer incorporates guardrails
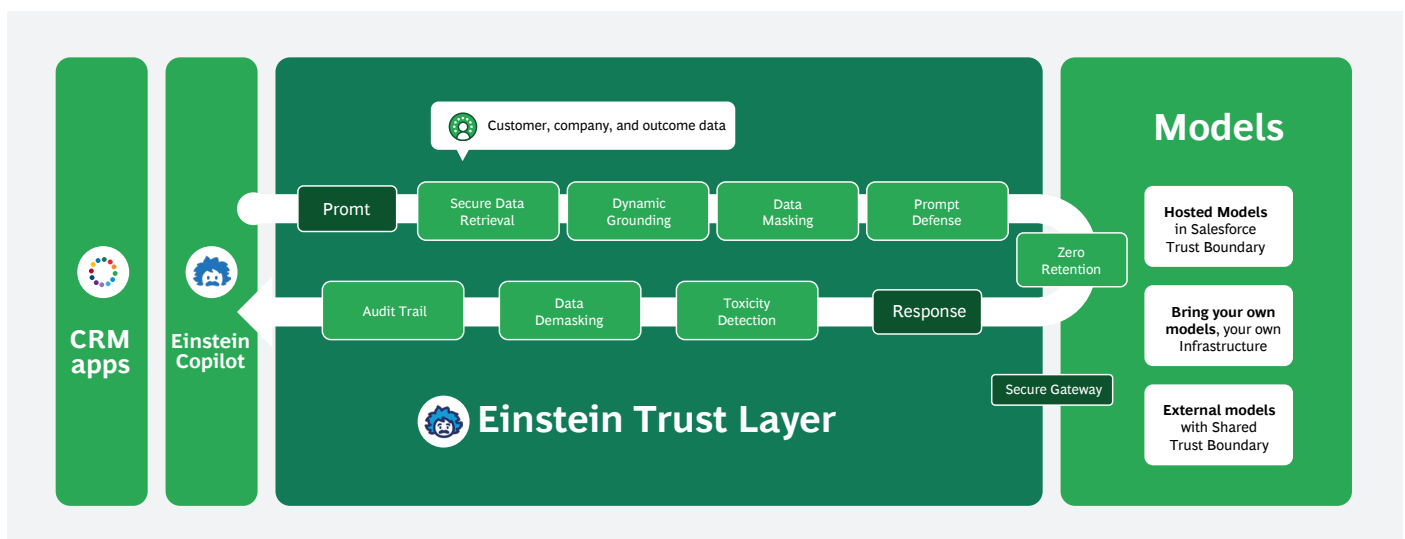
Source: Einstein Trust Layer, Salesforce.com 2023

As Exhibit 6 illustrates, when you generate a prompt that is built in Prompt Builder, the prompt is sent to the Einstein Trust Layer, which masks any sensitive data before sending it to the LLM. When prompts are sent to external models through the shared trust boundary, your data is encrypted to ensure its security in transit. Additionally, any sensitive information within the prompts is masked.

Another great concern is risk mitigation, both tactical and strategic. In a recent survey,[1] 73 percent of employees believe GenAI introduces new security risks, underscoring the need for organizations to leverage GenAI technologies built with trust first. In this regard, the zero retention of the Salesforce Trust Layer ensures that no information is stored or remembered by large language models, prioritizing user privacy and data security.

There are indeed many types of risks related to AI, including trust, data property, data quality, biases, hallucinations, costs of AI, value for money, human-centric vs. Full-bot approaches, business deployment, and so forth. These risks are recognized by dynamic, new regulations and frameworks that companies will have to carefully investigate. Our vision at BCG and Salesforce is to join forces to propose a strategic enterprise approach for AI implementation, taking into consideration all these dimensions, and not simply proposing to launch Proof of Concepts or a pilot.

To set the stage, Salesforce and BCG have developed a framework of AI-driven Sales-related use cases matching the needs of companies in the Telco sector as illustrated in Exhibit 7.

We observed from most Salesforce customers that use cases relied on a blend of predictive and generative AI, as well as analytics and automation.
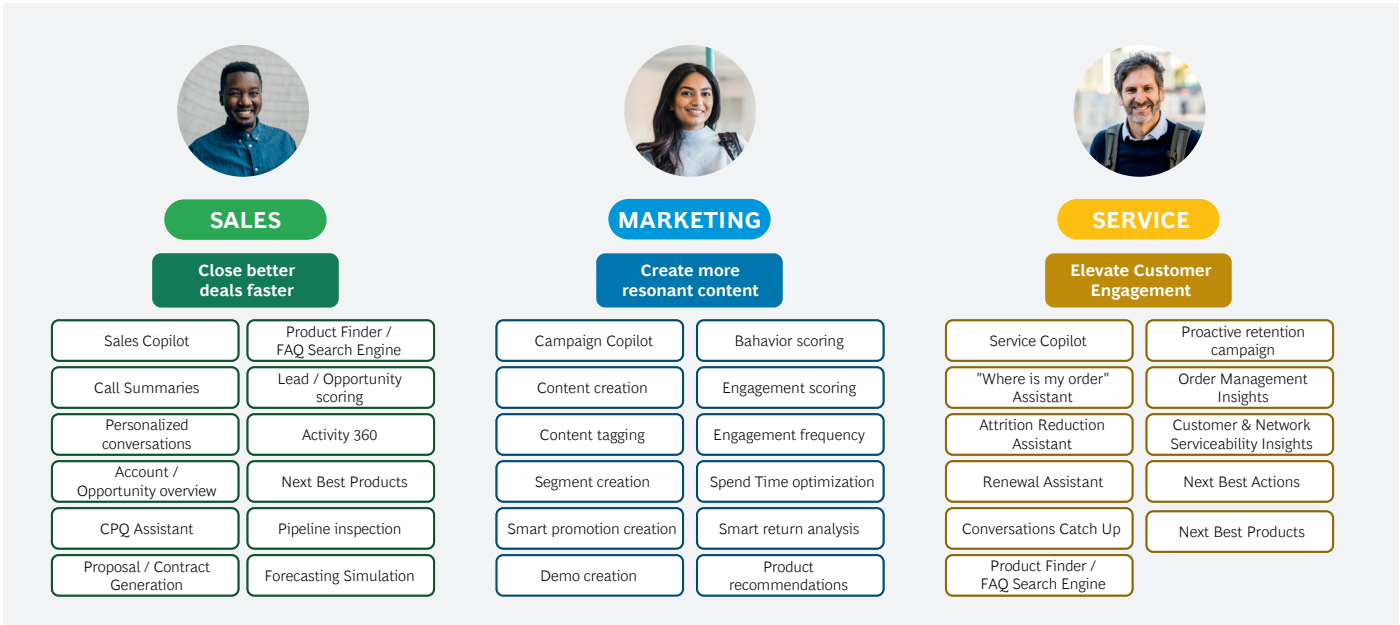
Customer use cases also relied on knowledge extraction across a mix of unstructured and structured data from multiple applications. This could include text documents, chats, audio, or video. The importance of unstructured data should not be underestimated.

These varied data sources and data types come with different data latency requirements that must be considered and coordinated for different use cases (e.g. real-time data streams or near real-time data latency requirements in addition to batch data from different systems and schedules).

1. FY23 Salesforce Customer Success Metrics

Exhibit 7 - Trusted AI, Built Into the Flow of Work
Accelerate pipeline + Supercharge productivity + Unlock revenue

SALES		MARKETING		SERVICE	
Close better deals faster		**Create more resonant content**		**Elevate Customer Engagement**	
Sales Copilot	Product Finder / FAQ Search Engine	Campaign Copilot	Bahavior scoring	Service Copilot	Proactive retention campaign
Call Summaries	Lead / Opportunity scoring	Content creation	Engagement scoring	"Where is my order" Assistant	Order Management Insights
Personalized conversations	Activity 360	Content tagging	Engagement frequency	Attrition Reduction Assistant	Customer & Network Serviceability Insights
Account / Opportunity overview	Next Best Products	Segment creation	Spend Time optimization	Renewal Assistant	Next Best Actions
CPQ Assistant	Pipeline inspection	Smart promotion creation	Smart return analysis	Conversations Catch Up	Next Best Products
Proposal / Contract Generation	Forecasting Simulation	Demo creation	Product recommendations	Product Finder / FAQ Search Engine	

Source: Salesforce Industry Advisory 2024

"**The building narrative we are hearing across our Telco clients is clear – GenAI's imperative for sales is to create smarter and more impactful customer interactions.**"

Bryan Gauch,
Managing Director and Partner, Global Salesforce Offering,
Boston Consulting Group

The majority of these use cases and features are already available. They can be mapped to service provider needs and help create a value-based transformation journey.

The business outcomes are already impressive. While security risks are a continuing concern for employees we have surveyed, 68 percent say that GenAI will help them better serve customers and save them an estimated five hours on average each week. Recent benchmarks on ongoing Sales AI pilots have shown a potential of 29 percent increase in productivity.

How to move from strategy to execution at scale

BCG and Salesforce have teamed up and designed two engagement archetypes that can be leveraged to kickstart the AI/GenAI journey for B2B sales organizations in the telco sector and create an aligned starting point and vision:

1. **Value Assurance.** This is directed to customers that want to maximize the value from their technology investment. To achieve this, Salesforce and BCG undertake a tailored diagnostic to pinpoint concrete opportunities for value enhancement, delivered by a joint team from BCG, Salesforce, and the client.

2. **AI/GenAI Exploration.** Also delivered jointly, in the format of a workshop, it will leverage best-in-class GenAI strategy and capabilities to drive sustained success. The outcome will be an industry point of view on the relevant use cases and will enable our clients to pilot and scale their AI/GenAI practice, providing the basis for a smooth implementation and transformation—faster and at a lower cost.

Following the initial vision and design, different approaches are available to realize the potential, depending on the value at stake and the readiness—from further opportunity exploration and detailing to full-scale transformation and support.

BCG and Salesforce teams have seen the potential of a predictive AI/GenAI future for service providers. Now is the time to make that future happen and embark jointly on this exciting journey.

Exhibit 8 – BCG x Salesforce AI/GenAI combination enables accelerated value generation of GenAI while de-risking the implementation

BCG
- Value-driven **strategies & transformations** paired with strong **CRM transformation management** capabilities
- Deep **industry & functional expertise**, best-in-class **Go-to-Market** frameworks and toolkits, optimized for CRM
- Sales, marketing and service persona-specific **change management approach**
- Trusted GenAI leader with **purpose-built AI assets** (e.g., Deep.AI) integrated into Salesforce

salesforce
- **Integrated CRM platform** with industry and functional specific clouds
- Strong **GenAI solutions and capabilities** as well as an **extensive marketplace** with third party apps
- **Product and platform expertise** to support deployment of high-value CRM capabilities
- Platform and **product roadmap insights**

BCG × salesforce
- **Best in class GenAI strategy & capabilities** to drive sustained success
- Deliver platform and GenAI implementations **faster and at lower cost**

Source: BCG