

Learning Materials: Prompt Framework Use Case- Sales

Sales Use Cases & Frameworks

A cheat-sheet for sales leaders, managers and reps. Each row lists a common sales task, the most suitable frameworks, reasons for selection, pitfalls to avoid, and a ready-made prompt to get you started.

Use case	Best-fit frameworks	Why these work	Failure modes	Prompt sample
Pipeline forecasting & revenue planning	DEPTH, RISE, P.R.O.M.P.T., TAG, SMART	DEPTH aligns sales, ops and finance; RISE provides step-by-step planning; P.R.O.M.P.T. captures outputs and metrics; TAG and SMART create clear goals	Unrealistic assumptions, inconsistent data, ignoring lead quality	**DEPTH:** You are a sales director, revenue analyst and ops manager. **Metrics:** increase pipeline by 20%, maintain conversion $\geq 15\%$. **Context:** SaaS with \$50k ACV. **Tasks:** audit pipeline, identify growth levers, design outreach cadence, build forecast. **Self-critique:** iterate until model accuracy $\geq 90\%$.
Customer acquisition & outreach planning	RISE, RTF, TAG, APE	RISE maps channels and sequences; RTF produces scripts; TAG locks goals; APE accelerates execution	Target mismatch, spammy outreach, non-compliance	**RISE:** Role: SDR manager. Input: target persona (mid-market HR directors) & channels (email,

				LinkedIn, phone). Steps: map channels → craft sequences → assign quotas → schedule training. Expectations: three sequences with projected response rates and compliance checks.
Goal setting & performance improvement	TAG, SMART, P.R.O.M.P.T., DEPTH	TAG and SMART anchor goals; P.R.O.M.P.T. defines deliverables; DEPTH provides coaching insights	Unattainable quotas, no measurement, misaligned incentives	**TAG:** Task: improve Q4 bookings. Action: implement a new discovery-call script and cross-selling program. Goal: increase bookings by 15% by Dec 31.
Customer relationship & complaint resolution	CARE, ERA, ROSES, TAG, RTF	CARE structures empathetic responses; ERA explains root causes; ROSES ensures safeguards; TAG sets reduction targets; RTF produces scripts	Tone-deaf responses, unresolved root issues, compliance gaps	**CARE:** Context: a customer complains about delayed onboarding. Action: draft a response acknowledging frustration, explaining the delay and proposing a remedy. Result: retain the customer and rebuild trust.

				Example: friendly yet professional tone.
Training & onboarding sales reps	RISE, CARE, APE, DEPTH	RISE structures training; CARE crafts welcoming materials; APE enables quick planning; DEPTH monitors metrics and feedback	Generic training, lack of engagement, no feedback loops	**RISE:** Role: sales enablement lead. Input: 5 new hires, product = HR tech platform. Steps: schedule 4-week training → include product demo, role-play, compliance; gather feedback each week. Expectations: 90% pass rate; satisfaction ≥8/10.
Territory & quota assignment	COAST, RACE, P.R.O.M.P.T., RISE	COAST clarifies objectives, scope and tests; RACE sets constraints; P.R.O.M.P.T. defines outputs; RISE sequences the assignment process	Unfair assignments, lack of transparency, ignoring market potential	**COAST:** Context: restructure territories for 10 reps across 5 states. Objectives: balance potential and workload. Actions: analyze historical sales, segment accounts, assign territories. Scope: maintain existing customer relationships. Tests: review territory equity using

				sales-per-rep metrics; adjust if variance >10%.
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Tip: Mix **DEPTH** for cross-functional planning with **RISE** for sequence, and lean on **TAG/SMART** to articulate clear outcomes.