

AI for Sales & Marketing Leaders

Who Think Bigger



How to Use AI to Win More, Build Better Relationships, and Think Like a Growth Strategist.

AI Golden Rule

If you wouldn't
send it to a competitor
don't paste it into AI.

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don't paste it into AI.

1. Protect Your Data - Strip out client names, financial details, or anything proprietary.
2. Keep a Human in the Loop - Use AI to inform decisions — never to make them for you.
3. Measure clarity, not volume - how fast can you move from data to decision?

AI CLARITY FRAMEWORK

Most people ask AI for help writing - but not thinking.



Ask Smarter Questions

Don't start with output. Start with insight.

"You are my sales strategist. Analyze this list of realtors who referred us last year and those who didn't. What patterns do you see in location, timing, and message type? What kind of outreach would re-engage them this quarter?"



Refine The Noise

Use AI to find the signal, not just create more noise.

"Here's 6 months of booked moves and lost leads. What do my best clients have in common? What objections show up in losses? Which referral types bring in repeatable business?"



Challenge Assumptions

Don't ask AI for agreement, ask it to disagree with you.

"I think older adults downsizing respond best to print ads and direct mail. Play devil's advocate. What am I missing about how that audience is making decisions in 2025?"
"Here's the offer I plan to send to organizers. What could make it fall flat?"



Decide With Confidence

Every insight should lead to momentum, not another meeting.

"Here's what I know about our best clients and top referrers. What one move should I make this week that will bring the most ROI?"



assign AI
a role



insight first,
Output second



define success
in business terms

Next Level Thinking with AI

Output

“Write a
REALTOR
outreach email.”



Insight

“You’re my business growth advisor. Here are 10 realtors who referred me moves this year and 10 who ghosted me. Compare their online presence, activity, and messaging. What’s the difference? Draft a personalized email approach that reconnects with the ‘ghosts’ using their language.”

Next Level Thinking with AI

Output

“Summarize our
campaign results.”



Insight

“You’re my data storyteller.
Compare last quarter’s campaigns
and quantify which channel
delivered the best return per hour
of internal effort. Highlight what we
should double down on and what
to cut — with a visual summary I
can present to the CEO.”



Tara Holloway

CEO, Next Level Strategic

Strategic advisor Tara Holloway brings momentum to leaders ready for their next level. With over two decades of experience crafting proven frameworks, she transforms complex challenges into clear paths forward, delivering the clarity organizations need to grow.

25+ Years helping startups to Fortune 500s achieve strategic growth.

