

AI Sales Research and Personalized Outreach Example for Professional Services Firms

The Endurance Group increased sales outreach 4–5x with AI

The Endurance Group uses CustomGPT.ai to build AI-powered sales research assistants for each customer it serves, delivered in secure portals. Outreach volume is up 4–5x, workflow efficiency is up at least 300%, and the firm now runs a second business as an AI implementation partner.

300%

Increase in workflow efficiency

4–5x

More outreach volume per customer

2x

Revenue as an AI implementation partner

THE CHALLENGE

Static sales research that went out of date fast

The Endurance Group built custom sales strategies, reports and outreach materials for each customer through deep manual research. Those static reports went out of date quickly and needed constant updates.

As VP Conor Sullivan put it, “After all that work, a fresh news story could arrive and make the entire report outdated.” The process was too slow to keep up with customers’ changing needs.

WHAT THE ENDURANCE GROUP NEEDED**Interactive, not static.**

A tool customers could question as new needs arose.

Customer-specific context.

AI that understands each customer and its prospects.

Security.

Each customer’s data kept separate and protected.

HOW THE ENDURANCE GROUP SOLVED IT

Customer-specific AI assistants in secure portals

Chosen after a comparison.

After evaluating multiple AI tools, the team chose CustomGPT.ai for ease of use, security and flexibility.

Built with the persona generator.

No-code assistants, tailored to each customer, from document uploads and sitemap integration.

Embedded in secure portals.

Customers synthesize company information in real time and generate personalized outreach, with no manual updates.

ABOUT THE ENDURANCE GROUP

The Endurance Group began more than 20 years ago as an outsourced sales and marketing provider focused on cold calling, serving professional services firms, consultants, and insurance and accounting companies. It has since become a tech-forward consultancy that uses AI to help customers scale outreach and build their own AI solutions.

AT A GLANCE

INDUSTRY

Professional services: sales and marketing consulting

USE CASES

Sales research, personalized outreach, content generation

TEAMS

Sales, marketing, operations and customer support

HOW CAN AI IMPROVE SALES OUTREACH?

AI sales research, personalized outreach and data isolation

- 1 Research in minutes.

Natural-language questions replace hours of manual research per prospect.
- 2 Personalization at scale.

Email, LinkedIn, blog and sales content, drafted by AI and reviewed by people.
- 3 Data isolation.

Each customer’s knowledge base is separate, so proprietary information stays private.

RESULTS

Traditional vs AI-powered sales research

DIMENSION	TRADITIONAL	AI-POWERED
Time to research a prospect	Hours of manual work	Minutes via natural-language query
Knowledge currency	Static, outdated quickly	Queryable and always current
Delivery format	PDF reports and slides	Conversational portal, 24/7
Outreach per week	About 1 personalized message	4–5 personalized messages
Scalability	Limited by human capacity	Scales with prompts, not headcount

Staff now build AI solutions instead of writing static reports, which has made their work more engaging. The firm also offers CustomGPT.ai implementation services to other companies as an official implementation partner.

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Before, my clients could reasonably only reach out to maybe one target account a week... Now, they can quadruple or quintuple that because your technology makes it so easy to write all of this content that otherwise took a long time.

Conor Sullivan

VP, THE ENDURANCE GROUP

WHY IT WORKED

- No-code interface.

Assistants built in minutes.
- Persona tools.

Outputs tailored to each customer.
- Live knowledge.

Always-updated bots replace reports.
- Security.

Each customer’s data isolated.

ABOUT CUSTOMGPT.AI

CustomGPT.ai is a no-code platform for building AI agents that answer only from an organization's own content: documents, websites and knowledge bases. Every answer is grounded in verified sources with citations, and the platform is SOC 2 Type 2 and GDPR compliant. Organizations use it for customer support, internal knowledge search, website chat and more, across help centers, apps and the API.