

CALIBRATING PROFESSIONAL DISCRETION IN ARTIFICIAL INTELLIGENCE-SUPPORTED BUSINESS-TO-BUSINESS SELLING

Garrett HART

Marymount University, Arlington, VA, USA
gwh94945@marymount.edu

Darrell Norman BURRELL

Marymount University, Arlington, VA, USA
dburrell@marymount.edu

Freddy VALLE

Marymount University, Arlington, VA, USA
fvalle@marymount.edu

Michael HARPER

Marymount University, Arlington, VA, USA
mharper@marymount.edu

ABSTRACT

Artificial intelligence (AI) is becoming increasingly embedded in business-to-business (B2B) sales through applications such as lead scoring, forecasting, message generation, meeting summaries, customer relationship management, and next-best-action recommendations. Although these systems can improve speed and consistency, generative and emerging agentic AI also create new challenges for professional discretion because consultative selling depends on contextual interpretation, customer trust, ethical judgment, and the continuous development of salesperson expertise. This article presents a structured integrative review exploring how sales professionals and managers should calibrate their reliance on AI-generated sales recommendations. Drawing on research in AI-supported selling, human–AI reliance, automation bias, customer trust, adaptive selling, and sales management capability, the article develops a professional discretion calibration model. The model proposes four judgment filters (interpretive, relational, ethical, and developmental) that guide five response actions: accept, modify, reject, disclose, or escalate. The article contributes to sales management scholarship by explaining the judgment process through which AI-generated outputs are translated into customer-facing actions and by outlining the practical implications for the responsible use of AI in B2B sales.

KEYWORDS:

artificial intelligence, business-to-business sales, customer trust, professional discretion, sales management

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1. Introduction

Artificial intelligence (AI) is becoming an integral part of the decision infrastructure that enables sales professionals to identify prospects, interpret account signals, prioritize opportunities, communicate with customers, forecast revenue, and manage relationships. In business-to-business (B2B) sales, AI-enabled systems now support lead scoring, customer segmentation, sales forecasting, message drafting, meeting summarization, account prioritization, and next-best-action recommendations (Fehrenbach et al., 2025; McClure et al., 2024; Rodriguez & Peterson, 2024). These applications may increase speed and consistency, but they also alter the judgment demands placed on salespeople and sales managers, as selling requires interpretation, timing, emotional reading, ethical restraint, and the ability to recognize when an efficient action may be commercially useful but relationally damaging (Chaker et al., 2025; Mukhopadhyay et al., 2025).

Recent sales scholarship suggests that AI adoption in sales has outpaced theoretical understanding. For instance, McClure et al. (2024) highlighted a growing gap between widespread AI adoption in sales practice and the slower development of corresponding academic research. Similarly, Rodriguez and Peterson (2024) found that only a limited portion of AI-and-sales scholarship focuses specifically on the B2B sales process. This gap is significant because B2B selling often involves long buying cycles, multiple stakeholders, incomplete information, internal politics within customer organizations, and relationship histories that cannot be fully captured by a lead score, AI-generated message, or automated recommendation (Fehrenbach et al., 2025; Rodriguez & Peterson, 2024).

Digital sales research further highlights the importance of avoiding simplistic replacement narratives. Fischer et al. (2023) found that digital transformation changes the sales environment and the role of the sales function, but without displacing the human salesperson from value creation. Alavi and Habel (2021) similarly argued that the human side of digital sales transformation remains important because salespeople operate at the intersection of customers, data, technology, and organizational change. In this context, the value of salespeople increasingly depends on their ability to interpret AI-generated sales intelligence rather than simply taking it at face value (Chaker et al., 2025; Hautamäki & Heikinheimo, 2025).

1.1. Problem Statement

AI-supported selling has the potential to improve efficiency, yet it also increases the risk that sales professionals will come to overrely on automated recommendations in judgment-intensive, customer-facing decisions. This concern is practical rather than speculative, as AI tools are becoming increasingly involved in lead prioritization, customer communication, forecasting, account planning, and relationship management (Fehrenbach et al., 2025; Rodriguez & Peterson, 2024). This becomes problematic when recommendations that appear statistically plausible are nevertheless poorly timed, relationally insensitive, ethically questionable, or based on incomplete account context. The specific problem is that B2B sales organizations lack an integrated framework for determining when salespeople and sales managers should accept, modify, reject, disclose, or escalate AI-generated sales recommendations (Pathak & Bansal, 2024; Solberg et al., 2022).

1.2. Purpose Statement

The purpose of this structured integrative review is to explore how professional discretion can be preserved and calibrated when AI-generated recommendations influence B2B sales decisions. The review synthesizes literature on AI-supported selling, digital sales transformation, human-AI reliance, customer trust, adaptive selling, and sales management capability. Building on this synthesis, the article develops a professional discretion calibration model that positions interpretive, relational, ethical, and developmental judgment as critical safeguards for maintaining customer trust, ethical responsibility, and salesperson expertise.

1.3. Contribution Statement

This article contributes to the sales management literature in three ways. First, it reframes AI-supported selling as a judgment calibration problem rather than simply an adoption, automation, or efficiency problem. Second, it connects AI-in-sales research with human-AI reliance, automation bias, customer trust, adaptive selling, and managerial capability development. Third, it proposes a review-based framework that helps sales professionals and managers determine when AI output should be accepted, modified, rejected, disclosed, or escalated. Existing AI-in-sales research explains where AI enters the sales process, while human-AI reliance research explains overreliance and underreliance; however, neither stream fully explains how salespeople should translate AI-generated outputs into customer-facing actions. This article addresses that gap by identifying and describing the judgment filters that should intervene between system output and sales action.

2. Literature Review and Conceptual Framework

2.1. Artificial Intelligence-Supported Business-to-Business Selling

AI-supported selling refers here to sales work in which AI systems generate, organize, summarize, or recommend information that influences salesperson decision-making or customer-facing actions. Accordingly, this article is not concerned with AI as a broad organizational technology but with AI-generated recommendations, forecasts, content, summaries, and next-best-action guidance that directly inform the sales decision process. These systems can support prospecting, qualification, account prioritization, forecasting, message generation, sales coaching, and customer relationship management (Fehrenbach et al., 2025; Kumar & Shankar, 2025). Their practical appeal stems from the fact that B2B sales teams face growing pressure to respond quickly, personalize engagement, manage complex pipelines, and convert fragmented customer data into useful action (McClure et al., 2024; Rodriguez & Peterson, 2024).

The sales literature, however, suggests that AI-supported selling should not be treated as simple automation. Digital sales transformation changes informational, relational, organizational, and human resources in B2B practice (Mukhopadhyay et al., 2025). For example, a customer relationship management platform may identify a pattern, but it does not necessarily account for internal account politics, relationship history, budget timing, or the emotional temperature of a negotiation. This distinction underscores the importance of professional human discretion because salespeople must assess whether AI outputs are accurate, relevant, timely, and contextually appropriate before acting on them.

2.2. Human-AI Reliance and Automation Bias

Research on human-AI reliance provides a second conceptual foundation by demonstrating that the central challenge is one of calibration rather than simple trust or distrust. Solberg et al. (2022) argued that reliance on AI decision aids depends on trust, perceived risk, and task conditions rather than technical performance alone. Similarly, Wischniewski et al. (2023) emphasized the importance of determining whether trust in automated systems is warranted, excessive, or insufficient. In sales, this means the goal is not to maximize the use of AI recommendations but to calibrate reliance on them based on the recommendation's quality, the salesperson's expertise, the customer situation, and the potential consequences of an incorrect decision.

Automation bias makes this concern especially important. Romeo and Conti (2026) described automation bias as the tendency to overrely on automated recommendations in human-AI collaboration (Hart, 2025). In sales contexts, this bias may arise when representatives accept AI-generated lead scores, forecasts, email drafts, or next-best actions because the system appears data-driven or authoritative. Moreover, Lee et al. (2025) found that confidence in generative AI and task-specific self-confidence influenced whether knowledge workers engaged in critical thinking during AI-assisted tasks (Hart, 2026). Although this research was not conducted specifically in sales, its findings remain highly relevant because sales professionals routinely make decisions under time and revenue pressure and with incomplete information.

2.3. Customer Trust and AI-Mediated Communication

Research on customer trust adds a relational and ethical layer to this issue, as AI-supported selling affects not only internal decision-making but also how customers experience commercial interaction. Generative AI can help salespeople draft messages, summarize information, and personalize outreach, yet customers may interpret AI-mediated communication through perceptions of authenticity, transparency, social presence, and accountability (Puntoni et al., 2021; Wang et al., 2025). In routine interactions, customers may welcome speed and clarity, but in more sensitive interactions, such as pricing changes, service failures, renewal pressure, or strategic negotiations, AI-shaped communication may appear impersonal or careless if it lacks clear human ownership.

This body of literature supports treating relational and ethical judgment as distinct filters. Relational judgment concerns whether AI-supported action strengthens or weakens trust, credibility, and rapport, while ethical judgment concerns transparency, fairness, personalization boundaries, explainability, and responsible data use (Pathak & Bansal, 2024; Saura et al., 2026). A sales message may be efficient and grammatically polished yet still weaken trust if it ignores the customer's history, misuses inferred data, or disguises automated decision-making in a high-stakes exchange.

2.4. Sales Management Capability and Skill Preservation

Professional discretion is not developed by salespeople alone. Sales managers influence how representatives interpret AI output, how much pressure they feel to follow system recommendations, how mistakes are discussed, and whether teams share lessons about AI use. Hautamäki and Heikinheimo (2025) found that fully leveraging AI in B2B sales depends on sales managers' capabilities and organizational knowledge processes. Meanwhile, Chen and Zhou (2022) showed that management

support and salesperson self-efficacy shape AI acceptance. These findings suggest that AI-era sales judgment is partly a managerial capability.

Skill preservation is equally important. AI systems may draft messages, recommend next actions, summarize meetings, generate objection responses, and support account planning. Although these capabilities can improve productivity, they may also reduce the cognitive effort required for salespeople to develop expertise if they replace reasoning rather than encourage reflection (Amankwah-Amoah & Appiah, 2025; Lee et al., 2025). Developmental judgment therefore asks whether a particular use of AI strengthens or weakens salesperson capability over time. This question is especially relevant for early-career salespeople, who may learn the craft of selling in environments where AI is embedded from the beginning.

2.5. Core Constructs

Professional discretion is defined as the salesperson's capacity to evaluate AI-generated recommendations in light of customer context, relationship quality, ethical expectations, and the long-term development of sales expertise. Calibration is the process of determining the appropriate level of reliance on AI in a given sales situation. Interpretive judgment concerns the accuracy, relevance, timing, and contextual fit of the recommendation. Relational judgment concerns whether AI-supported action strengthens or weakens trust, rapport, credibility, and accountability. Ethical judgment focuses on transparency, fairness, explainability, personalization boundaries, and responsible data use. Developmental judgment considers whether AI use strengthens or weakens salesperson expertise over time. These four filters are related but analytically distinct: interpretive judgment evaluates fit, relational judgment evaluates trust consequences, ethical judgment evaluates responsible use, and developmental judgment evaluates learning effects.

2.6. Conceptual Integration

The reviewed literature points to a common explanatory pattern: AI-generated sales recommendations do not become effective sales actions until they have been interpreted through professional judgment. Research on AI in sales explains why AI is increasingly embedded across the sales process, while research on digital sales transformation explains why sales work is reorganized around new informational and relational resources, and human–AI reliance research explains why users must calibrate trust in AI rather than accept or reject it automatically (Fehrenbach et al., 2025; Fischer et al., 2023; Solberg et al., 2022). Customer trust research explains why AI-mediated communication must be evaluated through authenticity and transparency, while sales management research explains why professional discretion must be coached and sustained through managerial routines (Hautamäki & Heikinheimo, 2025; Wang et al., 2025).

Drawing these perspectives together, the review is guided by three research questions. First, how does prior research explain the judgment risks created by AI-supported selling in B2B contexts? Second, what forms of professional judgment are needed to calibrate reliance on AI-generated sales recommendations? Third, how can sales managers translate these forms of judgment into practical response strategies that preserve customer trust, ethical responsibility, and salesperson expertise?

3. Materials and Methods

3.1. Review Design

This article adopts a structured integrative review design. This approach is appropriate because the focal problem spans several interconnected research streams, including AI in sales, digital sales transformation, human–AI reliance, customer trust, adaptive selling, and sales management capability. A narrow systematic review would risk fragmenting the problem too sharply, while an unstructured narrative review would provide less methodological discipline. The integrative approach, by contrast, aligns with the article’s objective of synthesizing adjacent bodies of literature into a conceptual framework for AI-era professional discretion (Jaakkola, 2020; Snyder, 2019).

3.2. Search Strategy and Corpus Construction

Relevant sources were identified through a targeted literature search strategy using eight databases: Google Scholar, EBSCO Business Source, ScienceDirect, Taylor & Francis Online, Emerald Insight, SpringerLink, SAGE Journals, and the ACM Digital Library. The final search and screening pass was completed in May 2026. Search terms addressed three areas. The technology area comprised AI in sales, AI-supported selling, generative AI in sales, and agentic AI in sales. The sales context area comprised B2B sales process, digital sales transformation, sales management capability, CRM governance, and AI-mediated communication. The judgment area comprised human–AI reliance, automation bias, trust calibration, customer trust, and adaptive selling. Terms from these areas were used in combination across the eight databases, with the judgment area included in order to capture human–AI reliance scholarship published outside the sales literature.

Screening proceeded in two stages against the inclusion and exclusion criteria stated in Section 3.3. The initial search produced a preliminary pool of 41 candidate sources. These sources were first screened at the title and abstract level, and those surviving that stage were then screened at the full-text level against the same criteria, with particular attention to whether the source offered insight bearing on the article’s model-building objective rather than on AI in sales generally. Eighteen of the 41 candidate sources were excluded across the two stages, and 26 sources were retained for synthesis. Table no. 1 reports the distribution of the retained sources across six source domains together with the function each domain serves in the review.

Given the rapid evolution of AI-supported selling following the emergence of generative and agentic AI systems, sources published before 2023 were retained only when they provided methodological foundations, established concepts relating to trust and reliance, or offered important context on digital sales transformation. Contemporary claims about AI-supported sales practice were therefore weighted toward 2024–2026 scholarship. The corpus was intentionally bounded because the purpose of the review was not to provide a comprehensive map of all AI applications in sales but to synthesize the literature that is most directly relevant to professional discretion calibration.

3.3. Inclusion and Exclusion Criteria

Sources were included when they satisfied all four of the following criteria: (1) the source was published in English; (2) the source appeared in a peer-reviewed journal or in recognized scholarly conference proceedings; (3) the source addressed

at least one of the article's substantive domains, namely AI-supported selling, digital sales transformation, human–AI reliance, customer trust, adaptive selling, sales management capability, or skill preservation; and (4) the source offered conceptual or empirical insight bearing on salesperson or sales manager judgment, reliance calibration, customer trust, managerial capability, or salesperson learning, rather than describing AI functionality alone.

Sources were excluded when they met any one of the following criteria: (1) the source discussed AI in broad organizational terms without meaningful connection to sales, customer engagement, decision-making, trust, ethics, managerial capability, or salesperson learning; (2) the source was primarily a technical system-design paper without implications for professional judgment in customer-facing work; (3) the source was trade commentary, a practitioner report, or another non-peer-reviewed publication; or (4) the source was a broad digital transformation study with limited relevance to customer-facing sales discretion. The same criteria were applied at both the title and abstract stage and the full-text stage.

3.4. Coding and Synthesis Procedure

Each retained source was coded according to its publication domain, focal phenomenon, theoretical lens, judgment implication, reliance implication, customer trust implication, and relevance to sales management practice. The synthesis proceeded in four stages. First, the literature was reviewed to identify recurring tensions in AI-supported selling, including overreliance on AI, weak transparency, reduced critical thinking, relational misalignment, ethical uncertainty, and potential erosion of salesperson expertise. Second, these tensions were grouped into four discretion categories: interpretive judgment, relational judgment, ethical judgment, and developmental judgment. Third, these categories were compared against practical decision points in AI-supported selling, including prospecting, lead prioritization, message generation, forecasting, account planning, renewal management, and customer follow-up. Fourth, the categories were translated into a best-fit conceptual framework specifying five possible response actions: accept, modify, reject, disclose, or escalate.

Table no. 1
Source domains and functions in the structured integrative review

Domain	Core Constructs	Number of Sources	Function in the Review
AI-supported B2B selling and sales process	Sales funnel applications, CRM systems, forecasting, account prioritization	5	Establishes where AI enters sales decisions
Digital sales transformation and adaptive selling	Sales enablement, adaptive behavior, the human side of digital sales	4	Explains why AI-generated outputs require interpretation within customer contexts
Human–AI reliance and automation bias	Trust calibration, appropriate reliance, critical thinking, decision aids	6	Explains why salespeople need calibrated rather than automatic reliance on AI

Domain	Core Constructs	Number of Sources	Function in the Review
Customer trust and AI-mediated communication	Transparency, authenticity, personalization boundaries, accountability	3	Explains relational and ethical risks in customer-facing AI use
Sales management capability and skill preservation	Coaching, knowledge processes, AI acceptance, human capital erosion	3	Explains how professional discretion is developed and sustained
Conceptual and methodological grounding	Conceptual article design, integrative review logic	2	Supports the review design and synthesis process

(Source: Authors' own synthesis)

4. Results

The results of this structured integrative review are presented as a thematic synthesis rather than as statistical findings. This distinction is important because the article's purpose is to clarify how adjacent research streams converge on the problem of professional discretion in AI-supported selling rather than to estimate causal effects. Four themes emerged from the synthesis.

4.1. Theme 1: Artificial Intelligence Recommendations Expand Decision Support but Require Interpretation

The first theme is that AI-supported selling extends decision support across the sales process while simultaneously increasing the need for professional interpretation. Sales technologies now support tasks such as lead scoring, forecasting, customer segmentation, message drafting, meeting summarization, and next-best-action guidance (Fehrenbach et al., 2025; Kumar & Shankar, 2025). These functions may help salespeople process more information and respond more quickly, but they also generate outputs that can appear decision-ready before they have been evaluated within the broader customer context.

This theme suggests that professional discretion begins with interpretive judgment. Salespeople must consider whether a recommendation is based on reliable data, whether important account information is missing, whether the timing aligns with the customer's decision-making process, and whether the recommendation is consistent with insights from previous interactions. AI-generated outputs can remain informative when contextual information is incomplete, but they should not be treated as contextually complete. Interpretive judgment is therefore necessary because AI outputs can be informationally useful and contextually insufficient at the same time.

4.2. Theme 2: Reliance Calibration Is Needed to Reduce Automation Bias

The second theme is that AI-supported selling creates a reliance calibration risk. Human–AI reliance research indicates that users may rely too much or too little on automated recommendations depending on trust, expertise, self-confidence, perceived risk, and task conditions (Dogru & Krämer, 2025; Solberg et al., 2022;

Wischnewski et al., 2023). In sales, overreliance may occur when representatives accept AI-generated forecasts, lead scores, objection responses, or communication drafts because the system seems objective or efficient. Conversely, underreliance may occur when experienced salespeople reject useful AI insights because the system feels intrusive or insufficiently credible.

The practical implication is that AI-supported selling should be managed through calibrated reliance rather than unquestioning compliance with AI recommendations. A salesperson who accepts every AI recommendation is not necessarily using AI well. Likewise, a salesperson who ignores AI entirely may miss relevant signals. Reliance calibration explains why acceptance and rejection are both insufficient as default responses; the central issue is whether reliance is appropriate according to the evidence, task sensitivity, customer risk, and salesperson expertise.

4.3. Theme 3: Customer Trust Requires Relational and Ethical Judgment

The third theme is that customer trust remains a central condition of effective AI-supported selling. AI-generated communication may improve speed and polish, but trust depends on more than message quality. Customers may evaluate whether the interaction feels authentic, transparent, and accountable (Puntoni et al., 2021; Wang et al., 2025), which is especially important in B2B settings, where sales relationships often involve high-value decisions, repeated interactions, negotiated commitments, and expectations of continuity.

Relational judgment asks whether an AI-supported action will strengthen or weaken trust in a specific customer relationship. Ethical judgment asks whether the use of AI is transparent, fair, explainable, and appropriate for the data involved. Although connected, these judgments address different concerns. For instance, a message may be relationally acceptable but ethically questionable if it relies on overly intrusive personalization. Conversely, a disclosed AI-assisted summary may be ethically transparent but relationally weak if it signals low attention during a sensitive issue. The model therefore separates relational and ethical judgment because trust damage and ethical risk can occur through different mechanisms.

4.4. Theme 4: Sales Managers Shape Professional Discretion

The fourth theme is that sales managers play a pivotal role in whether AI is treated as an instruction, an aid, or a learning tool. Managerial practices influence how representatives interpret AI-generated recommendations, how much pressure they feel to follow them, and whether they are expected to explain their reasoning. Research on sales manager capabilities suggests that AI value depends on knowledge processes, management support, and the ability to translate digital tools into sales practice (Chen & Zhou, 2022; Hautamäki & Heikinheimo, 2025).

This theme reinforces the importance of developmental judgment. If managers reward only speed, volume, or AI usage, representatives may learn to treat AI outputs as a shortcut. If managers coach reasoning, representatives may learn to compare AI outputs with account knowledge, customer evidence, and ethical considerations before making decisions. In this way, sales manager coaching can transform discretion from an individual habit into an organizational capability developed through coaching routines, CRM governance, training simulations, pipeline reviews, and team norms.

4.5. Thematic Synthesis and Proposed Framework

Synthesizing the four themes leads to the professional discretion calibration model for AI-supported selling. The model is founded on a simple premise: an AI-generated recommendation is not a decision but an input to decision-making. Before any customer-facing action is taken, the salesperson or manager filters the recommendation through interpretive, relational, ethical, and developmental judgment to determine whether it should be accepted, modified, rejected, disclosed, or escalated.

Table no. 2
Professional discretion calibration model for AI-supported selling

Judgment Filter	Core Question	Risk Addressed	Likely Response Actions
Interpretive judgment	Is the recommendation accurate, relevant, timely, and contextually appropriate?	Acting on incomplete or misleading platform data	Accept, modify, reject, escalate
Relational judgment	Will the action strengthen or weaken trust, rapport, credibility, and accountability?	Damaging customer relationships through poorly timed or impersonal action	Accept, modify, reject, disclose, escalate
Ethical judgment	Is the action transparent, fair, explainable, and appropriate for the data involved?	Using opaque, intrusive, or unfair AI-supported recommendations	Accept, reject, disclose, escalate
Developmental judgment	Does this use of AI strengthen or weaken salesperson expertise over time?	Reducing critical thinking, adaptive selling skill, or professional learning	Accept, modify, reject, escalate

(Source: Authors' own synthesis)

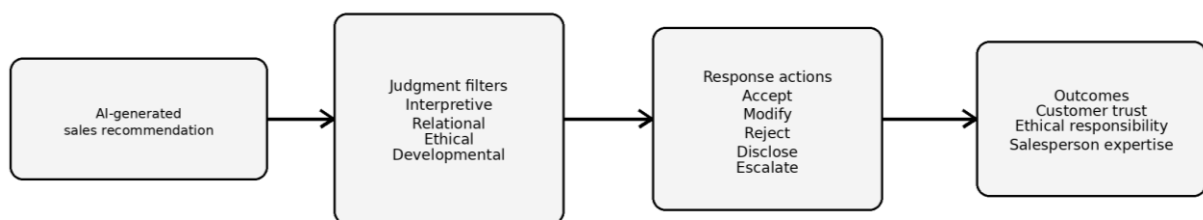


Figure no. 1: Professional discretion calibration model
(Source: Authors' own conceptualization)

The model generates five testable propositions.

Proposition 1: The relationship between AI-generated sales recommendations and salesperson action is mediated by interpretive judgment, such that recommendations are more likely to be accepted when they are perceived as accurate, timely, relevant, and contextually appropriate.

Proposition 2: Relational judgment moderates the use of AI-generated communication, such that salespeople are more likely to modify or reject AI-generated messages when customer trust, account sensitivity, or relationship maturity is high.

Proposition 3: Ethical judgment increases the likelihood that salespeople will disclose or escalate AI-generated recommendations when those recommendations involve opaque decision logic, sensitive customer data, pricing implications, or high-stakes contractual consequences.

Proposition 4: Developmental judgment reduces the risk of salesperson skill erosion by encouraging representatives to compare AI-generated outputs with their own account knowledge and reasoning before acting.

Proposition 5: Sales manager coaching strengthens professional discretion calibration by reinforcing when AI recommendations should be accepted, modified, rejected, disclosed, or escalated.

5. Discussion

The thematic synthesis suggests that AI-supported selling should not be understood as a straightforward technological enhancement of traditional sales practice. AI may improve speed, visibility, and consistency, but those gains do not remove the need for professional judgment. Instead, AI shifts where judgment is applied in the sales process. Salespeople and sales managers increasingly apply professional discretion at the point where an AI-generated recommendation, message, forecast, or account signal must be evaluated before it is translated into customer-facing action.

5.1. Theoretical Implications

The first theoretical implication is that AI-supported selling is better understood through a professional discretion lens than through a simple adoption lens. Adoption research helps explain whether salespeople use AI tools, but it does not fully explain whether they use them wisely. The present review suggests that salesperson judgment operates between system output and customer-facing action. Accordingly, future sales theory should treat AI recommendations as mediated by human interpretation rather than as direct predictors of performance.

The second theoretical implication is that human–AI reliance theory can sharpen sales scholarship. The sales literature often emphasizes effectiveness, enablement, and performance improvement, while reliance research explains why users may overtrust or undertrust automated support (Solberg et al., 2022; Wischniewski et al., 2023). Integrating these traditions helps explain why AI-supported selling requires calibration. The issue is not whether AI should be trusted in general, but whether a specific recommendation deserves reliance in a specific sales situation.

The third theoretical implication is that customer trust and salesperson development should be treated as central outcomes of AI-supported selling rather than peripheral concerns. A sales organization may increase productivity while weakening customer trust or salesperson expertise if AI use is poorly governed. This possibility complicates efficiency-centered views of AI adoption and suggests that sales management research should examine judgment quality alongside activity volume, response speed, and system usage.

5.2. Contributions to Sales Management Scholarship

This article contributes to sales management scholarship by connecting bodies of literature that are typically discussed separately. AI-in-sales research explains emerging applications; human–AI reliance research explains calibration risks; customer trust research explains relational and ethical implications; and sales management research explains how organizations develop and sustain professional

capability. The professional discretion calibration model integrates these streams by showing how salespeople can translate AI output into customer-facing action through structured judgment.

The article also contributes by offering a more precise vocabulary for AI-era sales coaching. Rather than asking only whether a representative used AI, managers can ask whether the representative interpreted the recommendation, considered the relationship, evaluated ethical risk, and preserved learning. Such a shift may help sales organizations distinguish thoughtful AI use from superficial tool compliance.

5.3. *Boundary Conditions*

The proposed model is most relevant in complex, high-stakes, relationship-dependent B2B selling contexts. Professional discretion calibration is likely to matter most when decisions involve high account value, long sales cycles, multiple stakeholders, sensitive customer data, pricing implications, service recovery, renewal pressure, strategic negotiations, or customer dissatisfaction. By contrast, the model may be less critical for low-risk administrative uses of AI, such as routine scheduling notes, basic meeting summaries, or internal activity reminders. This boundary condition is important because the article does not argue that every AI-supported sales task requires the same level of scrutiny. Rather, the level of professional discretion should rise in line with customer risk, relational sensitivity, ethical exposure, and task uncertainty.

5.4. *Managerial Implications*

The findings suggest that sales leaders should manage AI use as a judgment process rather than simply as a technology adoption initiative. Pipeline reviews, coaching conversations, and CRM governance routines should include explicit discussion of why an AI recommendation was accepted, modified, rejected, disclosed, or escalated. This approach may be more useful than measuring usage alone because it reveals whether representatives understand both the capabilities and limitations of AI-supported guidance.

Managers should also establish communication norms for AI-generated sales messages. Low-sensitivity communication, such as scheduling notes or routine meeting summaries, may be appropriate for AI-assisted drafting followed by human review. By contrast, high-sensitivity communication, such as pricing changes, service failures, renewal pressure, strategic negotiations, or customer dissatisfaction, should require substantial human authorship and review. This distinction preserves efficiency where risk is low while protecting customer trust where relational consequences are higher.

Finally, sales organizations should treat CRM data quality as a critical component of their judgment infrastructure. AI-generated recommendations are only as reliable as the data available to the underlying system, meaning that incomplete account notes, outdated stakeholder maps, missing objections, or weak buyer-context documentation can yield recommendations that appear precise but are contextually fragile. Managers should therefore evaluate not only activity volume but also whether the customer information feeding AI systems is sufficiently complete to support responsible recommendations.

5.5. Limitations and Future Research

Despite its insights, this article is limited by its conceptual and review-based design. The professional discretion calibration model is developed through integrative synthesis rather than original field data, and thus requires empirical validation in active B2B sales environments. The review is also bounded by source selection and by the rapid pace of AI development, especially as agentic AI shifts from making recommendations toward semi-autonomous action (Gonzalez et al., 2026). These limitations do not undermine the model, but they do suggest that it should be regarded as a foundation for further theoretical development and empirical investigation rather than as a definitive framework.

Future research should test whether interpretive, relational, ethical, and developmental judgment predict sales outcomes, customer trust, forecast accuracy, ethical decision-making, and salesperson learning. Qualitative field studies could examine sales calls, CRM notes, pipeline reviews, coaching sessions, and account-planning meetings to observe how salespeople reason when AI recommendations conflict with customer context. Experimental studies could compare customer reactions to human-written, AI-assisted, and fully AI-generated sales messages across different levels of disclosure, message sensitivity, account value, and relationship maturity. Longitudinal studies, in particular, would be useful for determining whether repeated AI use strengthens or weakens salesperson expertise over time.

6. Conclusions

AI-supported selling requires disciplined human judgment, not simply expanded technological capability. AI can help sales organizations identify opportunities, prioritize accounts, personalize communication, improve forecasts, and support customer relationship management, but such benefits depend on how salespeople and managers interpret AI outputs before acting on them. The professional discretion calibration model provides a structured way to preserve the human contribution to consultative selling by specifying the judgment filters and response actions needed when AI-generated recommendations enter the sales process.

The article's primary contribution is to position professional discretion as a core sales management capability of the AI era. Sales teams that treat AI as an unquestioned authority may achieve greater speed while weakening customer trust, ethical transparency, and salesperson expertise. Conversely, sales teams that reject AI reflexively may miss opportunities to improve responsiveness, insight, and coordination. A more sustainable path lies somewhere in the middle: one of calibrated reliance, where AI supports decision-making while sales professionals remain accountable for interpretation, communication, ethics, and learning.

Author Contributions

Conceptualization, G.H., F.V., M.H., and D.N.B.; methodology, G.H., F.V., M.H., and D.N.B.; formal analysis, G.H., F.V., M.H., and D.N.B.; investigation, G.H., F.V., M.H., and D.N.B.; resources, G.H.; data curation, G.H., F.V., M.H., and D.N.B.; writing - original draft preparation, G.H., F.V., M.H., and D.N.B.; writing - review and editing, G.H., F.V., M.H., and D.N.B. All authors have read and agreed to the published version of the manuscript.

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