A virtual worker for B2B inside sales.

A virtual worker that works your target accounts beside your sellers, and treats each account as a relationship, not a transaction. The examples follow Veridane, a made-up software company, and its target account, Meridian Commercial Bank, also made up.

Your customer

Their own objectives, for the relationship and for each conversation

CONTACTS

- CIO
- Head of AI and Data
- CISO
- Procurement

ON ANY CHANNEL

Phone · Email · Web chat · Text · WhatsApp

They deal with the same named worker each time, and never repeat themselves when they switch channel or speak to a seller.

Your account team

People and virtual workers together, with objectives for each account, each with an owner and a time frame

PEOPLE

- Account executive
- Sales development
- Solutions engineer
- Customer success

5 They answer in CVW, email, Slack or Teams, or from their AI assistant.

Requests for decisions, hand-offs

Decisions, instructions, work handed back

2 VIRTUAL WORKERS

- **Alex** — Target accounts
- **Jamie** — Customers
- **Robin** — Research

4 Assisted in business hours · Automated after hours

3 **Sage, the coordinator** — Watches, balances, coaches, chases and reports

Tess, the data steward — Loads and checks your files

Your company

Goals and priorities for the business, and the systems it runs

SYSTEMS IT RUNS

- CRM
- Marketing automation
- Sales engagement
- Quotes and contracts
- Product usage
- Support and success
- Calendars and email
- Content library

Reached only through controlled access, with the limits checked outside the model.

1 **Every conversation works toward three sets of objectives**: your company's, your account team's and the customer's, with a rule for when they conflict. **One memory for each account** holds every conversation, promise, meeting and opportunity, whoever the customer spoke to and on whichever channel.

Key events reported by the worker → **Confirmed** when your own records show it → **Scorecards and value** for each worker and account → **Lessons** for the next conversation

FIVE IDEAS, NUMBERED IN THE PICTURE

1 Three sets of objectives

Your company's, your account team's and the customer's. Promises made are kept and tracked.

2 Named workers own their accounts

Each account belongs to one worker. Clones clear a backlog; customers only see the name.

3 Sage and Tess

Part of every deployment and always on. Sage coordinates the team. Tess, the data steward, loads your files.

4 Automated after hours

Assisted in business hours, automated after hours under tighter limits, paused outside every window.

5 Use it from your AI assistant

See status, decide requests and instruct Sage from the assistant you already use.

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What it is worth.

The return comes from four sources: more first meetings with the right people, time given back to your sellers, faster answers to inbound interest, and intelligence from every call. A pilot measures each one in your own numbers, on the worker's scorecard.

WHAT THE RESEARCH SAYS

7×

Firms that answered an online enquiry within an hour were nearly seven times as likely to qualify the lead as firms that waited longer. Among firms that replied within 30 days, the first reply took 42 hours on average, and 23% never replied.

Harvard Business Review, March 2011: 1.25 million leads at 42 US firms, and an audit of 2,241 firms.

30%

of a sales rep's week goes on selling. The other 70% goes on work that is not selling.

Salesforce, State of Sales, sixth edition, 2024. 5,500 sales professionals.

61%

of B2B buyers prefer to buy without a sales rep, yet they still want a person for decisions about fit.

Gartner, June 2025. A survey of 632 B2B buyers, August to September 2024.

$104,920

is the median yearly wage of a US sales rep for technical and scientific products.

US Bureau of Labor Statistics, May 2025.

AN EXAMPLE YOU CAN REDO WITH YOUR OWN NUMBERS

Input	Example	Where it comes from
Sales development reps	4	Your team
Yearly cost of one rep, with benefits	$136,000	The median wage above, plus 30%
Share of the week not spent selling	70%	Salesforce, above
Share of that work the worker takes on	25%	Assumed for one small process
Target accounts worked a month	200	Your records
Pipeline from one first meeting	$40,000	Your records
Extra first meetings when every account is worked on time	1 in 100 accounts	Assumed; the pilot measures it

Time given back to selling

4 reps × 70% × 25% = 0.7 of one rep's time, about **$95,000 a year**.

More pipeline

200 accounts × 1% = 2 more first meetings a month × $40,000, about **$960,000 a year** in pipeline.

Answers after hours

Demo requests and trial sign-ups that arrive in the evening or at the weekend are answered in minutes, not the next business morning.

An example, not a promise.

Every figure marked as yours or assumed changes with your business. The pilot counts the time the worker handles and the results your own systems confirm, and the scorecard shows both.

THE SCORECARD ALSO SHOWS

Meetings booked and held · Ladder steps reached · Referrals secured · Initiatives found · Intel corrected · Promises kept

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Three sets of objectives. One memory for each account.

The worker treats each account as a relationship, not a transaction. It works toward what your company wants, what your account team wants for the account and what the customer wants, and it remembers every conversation.

THREE SETS OF OBJECTIVES

Your company
Goals and priorities for the business, such as meetings with senior leaders at target accounts, and the steps that count in each kind of call.

Your account team
Objectives for each account, each with an owner and a time frame, such as “Meet the CIO before the Q4 budget”.

Your customer
Their longer-term objectives, and what they want from each conversation: what they say, and what they do not say but the worker understands.

The worker also holds a rule for when the three conflict, so it knows which comes first.

ONE MEMORY PER ACCOUNT

Conversations
Every chat, email, call and message

Channels
Whichever one the customer uses

People
Every contact at the customer, and your colleagues

→

The account’s memory
- Open opportunities and meetings
- Promises in both directions
- What each contact prefers
- The three sets of objectives
- Recent events, dated, with sources

→

Read first
Before every conversation and task, by whichever clone of the worker picks up the item

A fact about one account goes to that account’s memory, not to the worker’s own notes. Before each conversation the worker gets a briefing from it. After the conversation a debrief is written, and it feeds the next briefing under “From last time”.

PROMISES MADE ARE KEPT AND TRACKED

Promise made
The worker tells the customer what it will do and when.

→

Tracked as work
It creates its own follow-up item, due on the promised day.

→

Chased
Sage checks due dates and promised callbacks, and chases whoever owns them.

→

Recorded
A promise kept or missed is recorded as a key event and scored.

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Eight situations. A ladder for every call.

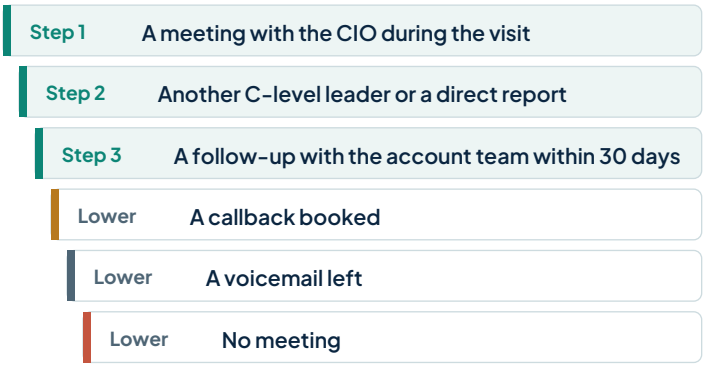
Each situation is a briefing: the honest reason for the call, and a ladder of outcomes from the meeting you want most down to a callback. The worker asks for the top step first.

THE EIGHT SITUATIONS, AS VERIDANE USES THEM

Situation	The honest reason for the call	Step 1: asked for first	Step 2: if Step 1 is declined
Meeting blitz around a visit	Veridane's leaders are in Singapore next week and want to meet senior IT leaders.	The CIO, during the visit	Another C-level leader or a direct report
New account	A first call into a bank Veridane has never sold to, after a LinkedIn connection.	The executive who owns AI governance	The contact, or another named stakeholder
Referral	A contact referred Veridane to the CISO and said their name may be used.	The CISO	Whoever the CISO points to
Before the RFP	A hint that the bank will look at AI governance next financial year.	The initiative's owner, or whoever writes the requirements	A working meeting on the initiative
Existing customer	One department already uses the product. A friendly check-in.	The leader of an adjacent team	A review with the contact and their team
Competitive evaluation	The bank is evaluating vendors, and Veridane is one of several.	The evaluation committee or the economic buyer	A working session with an evaluator
A new case study	A case study that answers a challenge the contact raised before.	A briefing to walk their team through it	A shorter session with the contact
In the contact's language	The same visit, with a contact who prefers Mandarin and colleagues who speak English.	The CIO, during the visit	Another C-level leader or a direct report

Step 3 in every situation is a follow-up with the account team within 30 days. Below that come a callback booked, a voicemail left, and no meeting. These eight are Veridane's outbound situations. The technology sales pack covers 28 situations in all, including inbound enquiries and demo requests, renewals, trials, upgrades and customer care.

ONE LADDER: THE MEETING BLITZ



Asked from the top, one step down only when a step is declined. Add your own situations, or change their briefings and steps, as settings.

One step at a time

The worker asks for the top step first and moves down only when it is declined. It never skips a step.

Counted only when agreed

"The CIO may join" is the lower step, recorded with a possible upgrade. A step counts only when the contact agrees to it.

Asked once

When a contact says they will check, the worker accepts that and never asks again. A tentative meeting beats a callback.

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One call, start to finish.

Tuesday, 9:40 in Singapore. Alex calls Marcus Lee, Head of AI and Data at Meridian Commercial Bank, in the meeting blitz situation. The companies and people are made up.

Before	Alex reads the account: its profile, the three sets of objectives, the known contacts and the assumptions to check. Priya Raman, the account executive, has set the account objective: meet Andrew Koh, the CIO, during the visit.
Opening	Alex opens with the default greeting, "Hi, I'm Alex, an AI assistant for Priya Raman at Veridane," and gives the real reason: Veridane's leaders are in Singapore next week.
Insight	Marcus confirms his role. Alex offers one point on what regulators now expect of AI in banks, then asks its first question: could Andrew Koh meet them during the visit?
Step 1	Andrew is travelling. Marcus will check with Susie Wong, who keeps his diary. Alex accepts that and does not ask again.
Step 2	Alex asks whether Marcus could meet next Thursday at ten, after checking the calendars of Priya and Tom Becker, Veridane's head of sales for Asia. Marcus agrees and suggests bringing the new Chief Data Officer.
Learned	The Chief Data Officer is Mei Ling Ho, who joined in March, which corrects the briefing. An AI governance initiative is budgeted for next year, with an RFP likely in the first quarter. The bank's integrator is named.
Price	Marcus asks what the readiness assessment costs. The price rule returns the list price, so Alex gives it, and leaves any terms to Priya.
Close	Marcus agrees to a WhatsApp message on the morning of the meeting. Alex confirms the time once, in the wrap-up, and ends the call.

WHAT WAS RECORDED

Field	Recorded from the call
Outcome	Step 2, confirmed: Marcus Lee and Mei Ling Ho, next Thursday at 10:00, with Priya Raman and Tom Becker.
Possible upgrade	Andrew Koh may join; Susie Wong is checking.
How it is confirmed	An invitation from Priya, sent through Susie.
Intelligence	A new contact and a correction (the Chief Data Officer). One initiative at "budgeted". One incumbent. Consent to WhatsApp on the day.
Work it created	A request to Priya to send the invitation, due in two hours. A check with Susie on Wednesday. The meeting, contacts and initiative written to the CRM.

The call is then scored on every side, and Sage chases the invitation and the CIO's answer.

The opening is set by country. The greeting is a template, with versions by language, channel and direction. Each country's profile adds its AI disclosure in the contact's language, naming the company, and, where a country requires it, who is calling and why.

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Every call listens for intelligence. Recorded with its evidence.

Besides its ladder, every call listens for eleven kinds of intelligence. They are bonuses, never a checklist: the worker takes what the conversation offers, one question at a time.

Sentiment
How the person feels about your company.

Willingness
Readiness for a meeting, a referral or a follow-up, not just friendliness.

Initiatives
Each project or plan, with its funding stage and timing.

Their biggest problem
The main problem they face with the kind of technology you sell.

Peers
Who else shares the concern. The worker states the pattern and asks who, never whether.

Referrals
Upgraded one level at a time, as shown below.

Competition
Vendors in place or being evaluated, with contract or renewal dates. Never disparaged.

New hires
New leaders and new roles, who bring new initiatives.

Channels
Consent to use another channel for a stated purpose, such as WhatsApp on the day.

Organisations
Every company and person mentioned, and why they came up.

Corrections
Briefing assumptions confirmed or corrected. A correction counts as something learned.

Into the CRM
Each item goes to the account's memory, and to your CRM in the file Tess writes for it every hour.

AN INITIATIVE'S FUNDING STAGE

Idea → Exploring → Use cases chosen → **Budgeted** → **Funded** → In procurement → Underway

A REFERRAL, ONE LEVEL AT A TIME

1. **A name**
   Who else shares the concern, and their role.
2. **Permission**
   To mention this conversation when contacting them.
3. **An introduction**
   A warm email introduction from the contact.

ASSUMPTIONS TO CHECK, FROM THE BRIEFING

- Susie Wong, procurement, keeps the CIO's diary. Low confidence.
- Rachel Tan, the CISO, owns AI security review. Unverified.
- The budget cycle closes at the end of the third quarter.
- A data platform project started last year. Vendor unknown.

Checked one at a time, only when the topic is near. Never read out as a list.

Evidence, not impressions
An item is recorded only when the call supports it, with a short quote. Nothing in the briefing counts unless the contact confirmed it, and a correction counts only when a fact actually changes or is confirmed.

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Outbound is one range. Every contact has a basis.

Outbound work covers a person who has never heard of Veridane and a person who asked to hear from it. Where each person sits is worked out from the records, not typed in, and each country's rules decide what the worker may do.

THE RANGE

	Cold: no relationship	Dormant: no recent activity	Warm: a relationship on record
Who	A person with no relationship with Veridane.	A customer or contact with no activity for a set time.	A person who opted in, attended an event or enquired. A person referred by a Veridane employee or by someone outside. A contact of the account team. A current customer.
Basis for contact	Only what the country's profile allows without consent. For some channels that is nothing.	The past relationship, for as long as the country's profile lets it count.	Consent, an enquiry, a referral or a personal contact on record, with its source and date.
Opening	A reason to contact now: a piece of news, a change of role.	What they bought or asked before, and what has changed.	What they did: attended, asked, signed up. Or who referred them.
Usual outcome	A next step, or a decline.	Buying again, or the reason they stopped.	A meeting, an order, a registration.
The eight situations, usually	New account.	A new case study, for a challenge the contact raised before.	Meeting blitz around a visit. Referral. Before the RFP. Existing customer. Competitive evaluation. In the contact's language.

Seven of the eight situations start from a relationship that is already on record. A situation is a starting point: a person may sit elsewhere in the range, and the records decide.

THE BASIS FOR CONTACT, RECORDED ON EVERY PERSON

Every person has one basis, with its source and the date. A list carries its basis when it is loaded.

An opt-in marketing list · **Attendance at an event** · **An enquiry** · **An existing customer** · **An employee referral** · **An external referral** · **A warm contact of the account team** · **None**

A list carries its basis

The person loading a list says where it came from and what the people agreed to. That becomes each person's record, with its source and date.

The country decides what a basis allows

Each country's profile says what each basis allows, by channel and by purpose. The plan of attempts uses only the channels a person's basis allows. A person with no allowed channel is not contacted. Where two countries are involved, the stricter rule applies.

"Where did you get my details?"

The worker answers from the record: the source and the date.

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A campaign, and a plan of attempts for each person.

A campaign groups work under one purpose, such as the meeting blitz around the Singapore visit. Its cadence is the plan of attempts at each person. A rep can also run a personal campaign: a list rebuilt from rules every week, worked in steps by the rep and the workers.

AN EXAMPLE PLAN: THE MEETING BLITZ AROUND THE VISIT

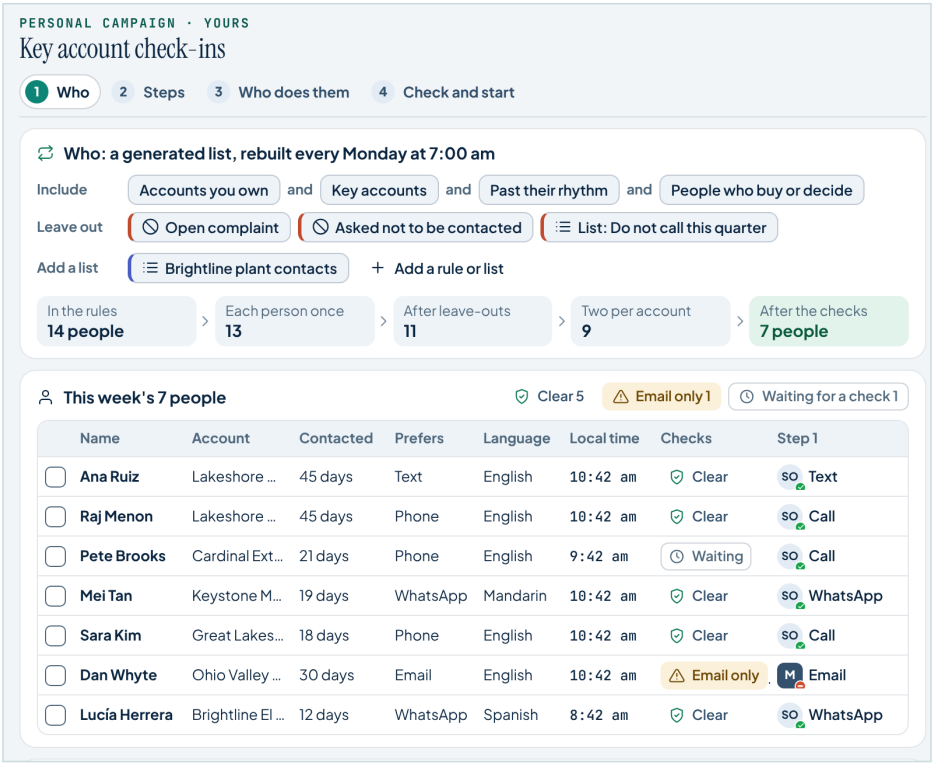
Day 1: email
Asks for the meeting with the CIO during the visit.

Day 3: call
Asks again for the same meeting.

Day 5: call
No answer: a short voicemail, with one reason and how to reply.

Day 8: message
A WhatsApp message, only where the person's basis allows it in their country.

The plan ends
After four attempts, or sooner: a meeting agreed, a stop, or the end date.



A personal campaign: a list rebuilt every Monday from rules, and this week's people with their checks, shown with the made-up Northcott example. Product design with made-up data.

PLANNED IN FOUR STEPS

1. **Audience**
   Combine lists: Add, Only if also in, Leave out, with the count after each.
2. **Message and offer**
   The purpose, the points to make, a dated offer, materials and the email template.
3. **Who and when**
   The workers and their clones, and the cadence.
4. **Review and start**
   Who will be contacted, and why the others will not be, before anything is sent.

EACH PERSON'S OWN PLAN

The plan decides when to try again and on which channel; the ladder decides what to ask for. The plan is cut down to the channels each person's basis allows in their country, and the contact check runs again before every attempt. Nobody gets more than one message a week across all campaigns.

More in: **The desks** · **Channels and compliance**

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Your ideal customers. The roles you sell to.

Veridane keeps one profile for each market it targets, with segments inside each, and the roles to reach in them. Sage drafts them from what Veridane already knows, and a person keeps each one before it is used. The profiles here are made up, like Veridane.

PROFILES AND THEIR SEGMENTS

Profile	Segment	Countries	Size	Signs that a company fits
Banks	Commercial and retail banks in Singapore	Singapore	1,000 staff or more	Uses models in credit, fraud or customer service. Has a head of AI, data or model risk. Is preparing for its regulator's guidance on AI risk.
Banks	Banks in Malaysia, Indonesia and Thailand	Malaysia, Indonesia, Thailand	1,000 staff or more	The same signs. No accounts yet, so a list search starts here.
Insurers	Life and general insurers in Singapore and Hong Kong	Singapore, Hong Kong	500 staff or more	Has a model risk or actuarial modelling team. Uses models in pricing or claims.

Not a fit, for both profiles: a company with no models of its own in use. Example accounts: Meridian Commercial Bank and Straits Pacific Bank for Singapore banks, Harbourline Insurance for insurers.

THE ROLES TO REACH

Role	Usual titles	Part in buying	What they care about
Head of AI and data	Head of AI and Data, Chief Data Officer, Head of Data Governance	Specifies	Governed models in production. Evidence for the regulator. Fewer manual reviews.
Technology executive	CIO, CTO	Decides	Risk to the bank. One platform, not many tools.
Security leader	CISO, Head of Information Security	Influences	Data stays in the bank. Access and audit.
Business unit leader	Head of Credit Operations, Head of Retail Banking	Uses	Faster decisions without new risk.
Procurement	Procurement Manager, Vendor Management	Approves spend	Terms, vendor review and price.
Head of model risk (insurers)	Head of Model Risk, Chief Risk Officer, Head of Actuarial Modelling	Decides	Model inventory and validation. Evidence for the regulator.

Drafted from what you know

Sage reads your company profile, who buys each product, your best accounts and their contacts' titles. Every line says where it came from. A draft is used for nothing until a person keeps it.

A segment like this account

From Meridian Commercial Bank's menu, Sage drafts a segment from its facts, its summary and its contacts' titles, to compare with the ones you have or to keep.

How the worker talks to each role

Each role points to the pack's kind of contact, so the worker speaks to a CISO as a security leader, and to procurement about terms, vendor review and price.

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Which accounts fit. Lists built from a segment.

Every account is checked against the segments, question by question, and every answer is kept so the reason shows. A list search starts from a segment, and what it finds becomes real accounts and contacts, not names on a spreadsheet.

WHICH ACCOUNTS FIT

Fits · May fit · Does not fit

- Asked question by question: the industry, each sign of fit, each rule-out, the size and the country.
- Industry and size come from your CRM files where they hold them.
- May fit shows Yes and No for a person. A person can set any fit by hand, and that is recorded.

WHERE A FIT SHOWS

Where	What it says
Accounts	A Fits column, and a filter by profile or segment
The account	"Fits: Commercial and retail banks in Singapore"
The people map	"Head of AI and data, specifies", and "Not known yet: a technology executive"
The briefing	"Known: Marcus Lee, Head of AI and Data (specifies). Not known: a technology executive."

A LIST SEARCH, FROM A SEGMENT

From a segment
Banks in Malaysia, Indonesia and Thailand: its countries, size and signs fill the search.

→

Companies found
A company search, each field tied to the page it came from.

→

Fit checked
The segment's questions on each one. A sure no is Left out, with its reason.

→

Already held?
Compared with your accounts, CRM files too: Already held, Part of, or May be.

→

Added by CVW
Sure fits go into the list you chose, with Undo. The rest wait, best fit first.

"Find companies like this one" starts from an account, and describes what it does, where and for whom, not its name. A company you already hold is never made twice.

WHAT A SEARCH RETURNS, FOR EXAMPLE (EVERY NAME MADE UP)

Candidate	Country	Result	Why
Kelana Commercial Bank	Malaysia	Added by CVW	Inside the industries. Uses models in credit.
Teluk Raya Bank	Indonesia	May fit	Inside the industries. No sign yet of models in use.
Meridian Commercial Bank Malaysia	Malaysia	Part of: Meridian Commercial Bank	Linked to the account Veridane holds.
Kelana Pay	Malaysia	Left out	A payments app, not a bank.

Find people at these companies

The segment's roles at up to 100 accounts. Each person is checked: do they work there now, and which role do they hold. They are linked to their account with their title, role and part in buying.

Real accounts and contacts

Each accepted company becomes a prospect account with an owner, an account team, a worker, news watchers and a profile check. Each person becomes a contact there. What was found is kept as their sources.

A work email or phone, on demand

For one contact at a time, with its source, and marked unverified. Never for a whole list. Social sites are never read: a person found there keeps only their title line and address.

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A sourced profile for every account.

Each account and key contact has a profile built from public sources, your records and conversations. Every line names its source and its date, and a person can correct or remove any line.

SOURCES

- The website and its main pages
- The latest annual report
- Documents in your Library
- News and job postings
- Your CRM and product usage
- Calls and conversations

THE PROFILE

Background	What it does, in one line; its size and markets
Strategy	From the latest annual report
Recent events	Dated, each with its page as the source
People	Who holds which role, and their part in buying
Relationship	Open opportunities, meetings, promises both ways
Fit and objectives	Its segments, and both sides' objectives

Every line names its source

In plain words, with its date: "From the bank's annual report, page 12". The account's own website and annual report are in use at once. Anything else about an account or a person waits for a person. A line marked wrong is kept in its history.

Research this person

On request: their business role, employer and public business statements. Never their home, family, health, beliefs, photos or private accounts. A person confirms each finding first. Nobody who asked to be forgotten is researched.

News and job postings

News is watched daily for key accounts and weekly for others. Job postings on the bank's own careers pages show what it is building: "Hiring a head of model risk for a new team". A hiring sign checks the fit again.

Signals that start work

Rules you set turn signals into work: an intent signal, a renewal date, a trial ending, usage near a limit, an incident (which holds outreach), a champion who moves, an account going quiet or cooling.

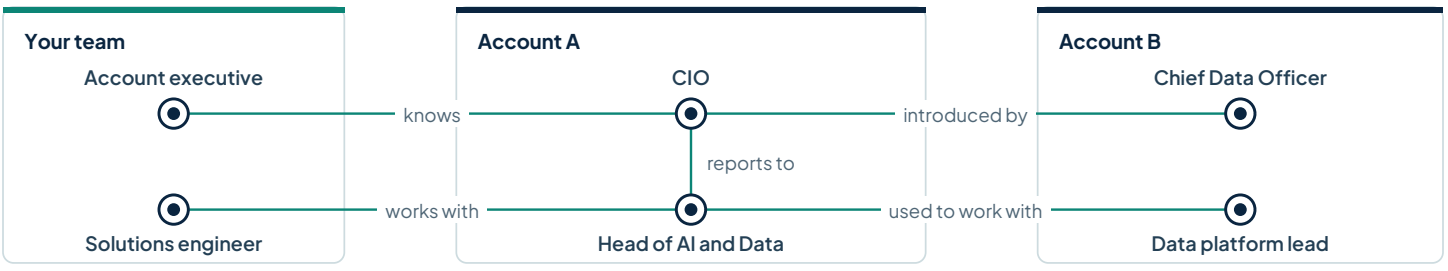
People who move

Recorded on both sides, with the date and the new title, and both owners are told. A champion who moves to another bank is a way in. A move found by research waits for a person.

Competitors

Profiles like accounts. Their offerings are matched to your products feature by feature, and matched at once only when nothing disagrees. What a competitor charges stays internal.

RELATIONSHIPS BETWEEN PEOPLE



Dated links between people on both sides, each with its type and source. Links cross accounts, so a warm introduction can be found.

More in: **Intelligence and prospecting**

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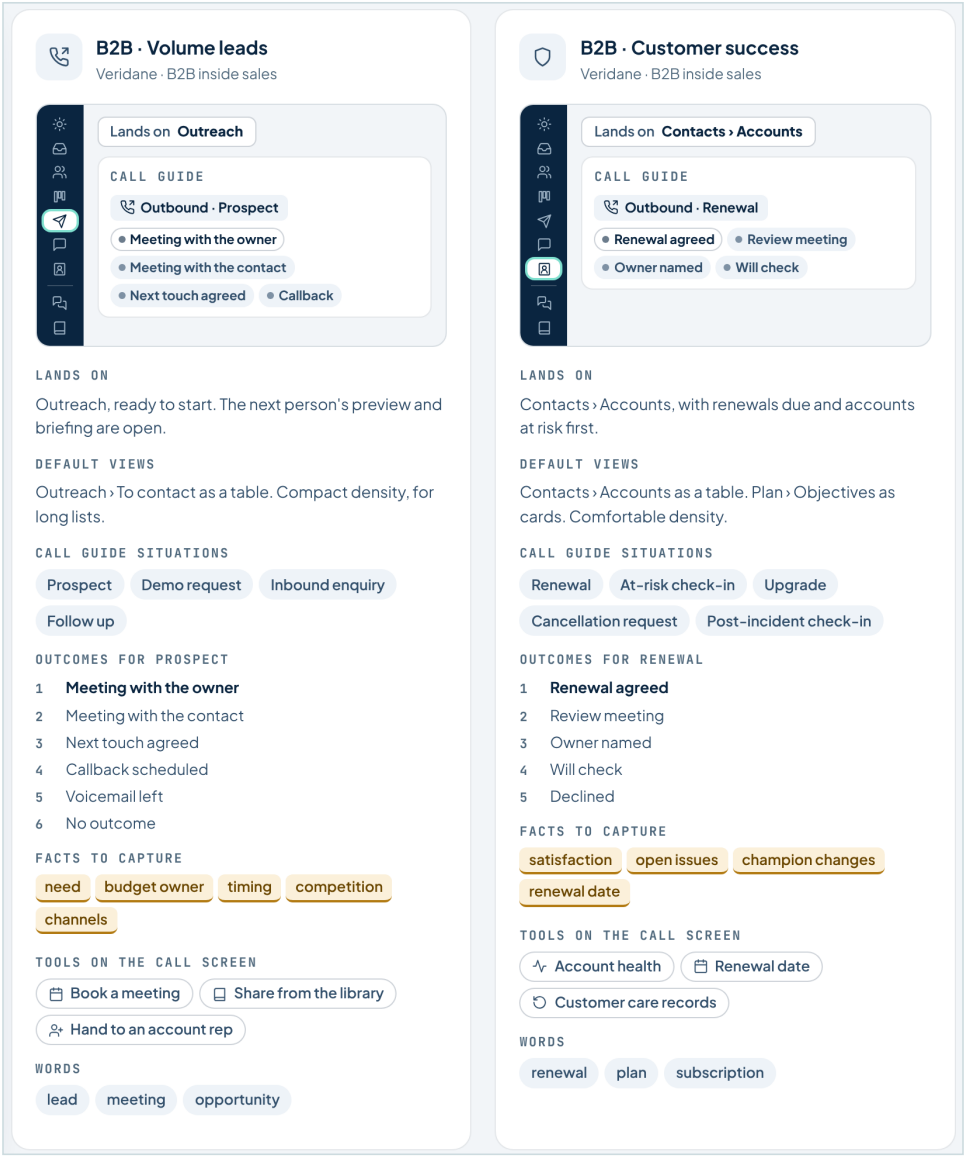
One desk for every kind of rep. The pack sets it up.

Every rep works from the Rep Desk: Today, Waiting, Workers, Plan, Outreach, Messages and Contacts, with Chat, Reference and a phone in the browser. The technology sales pack holds a profile for each kind of rep, and the profile sets where the desk opens and what the call screen holds.



Two rep profiles: volume leads and customer success, in the made-up Veridane example. Product design with made-up data.

Volume leads

Lands on Outreach, with the next person's briefing open. The call guide covers prospects, demo requests, inbound enquiries and follow-ups, and asks for a meeting with the owner first.

Customer success

Lands on Contacts › Accounts, with renewals due and accounts at risk first. The call guide covers renewals, at-risk check-ins, upgrades, cancellation requests and post-incident check-ins.

Who sets it

The pack sets the profiles. A Corvair engineer or partner can change them for your company, and your administrator gives each person a profile. With none set, the first applies.

The same for every rep

The screens, the phone, who may decide what, the checks before contact and each country's rules.

Each list switches between cards and a table, and keeps your own views. Every phone number and email has a copy button, and a status mark on every avatar shows who is free or on a call.

More in: **The desks**

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Priced from your Price book. Quoted on your own template.

The worker prices only what your Catalogue and Price book hold, each item in its own unit, and issues formal quotes on your template. A person never types a price on a quote.

THREE KINDS OF ITEM IN THE CATALOGUE

Products

Sold each, with a usual lead time. A lead time check gives the date it can ship.

Services

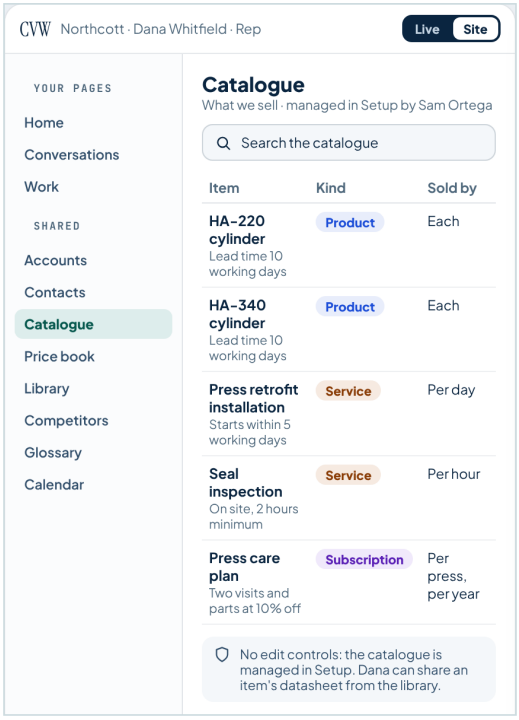
Per hour, day or project, with when it can start. For example, an implementation, per day.

Subscriptions and licences

Per seat or plan, per month or year. For example, Veridane's platform, per seat per year.

THE PRICE BOOK

Each item is priced in its own unit, such as "2,400.00 per seat per year". A price list can apply to a state or a country. The lowest price that may be agreed shows only to people who may agree a price. Before a price, the worker asks what it must know first, such as the plan, the number of seats, the term and when it is needed.



The Catalogue, shown with the made-up Northcott example. Product design with made-up data.

FORMAL QUOTES, INCENTIVES AND TERMS

A formal quote

Made from your own quote template, numbered, with its validity, the terms that must be on a quote and any contract's reference. The worker issues a quote up to a total you set. Above it, or in another currency, your named person issues it, and the customer is told when to expect it.

Revised and followed up

A revision goes back to the worker, who checks every line again. A sent quote gets follow-up work on the day promised, and an expired quote shows as expired.

Incentives

Dated rules: percent off, amount off, a fixed price, a free item or a rebate, by product, family, customer class, quantity, order value, or "first order back" for a dormant account. One incentive applies to a price. Under a contract, an incentive applies only if you say so.

Terms that must be said

Checked in every reply. A reply that leaves one out is held, with the words to add.

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Decisions stay with your sellers. Each one has a limit.

A worker asks a person when a decision is not its to make: a discount past its limit, pilot terms, or a time it cannot check. Each person has their own limit too. An ask past it goes up, with the facts and the same due time, and silence is never taken as a yes.

AN EXAMPLE: MERIDIAN ASKS FOR 15% OFF A THREE-YEAR SUBSCRIPTION

Alex may agree alone	Priya Raman may agree	Tom Becker may agree
Up to 5%	Up to 10%	Up to 20%
The worker's own limit, from your rules.	Her own limit, as the account executive.	His limit, as head of sales for Asia.

Alex asks
Priya gets the ask with the figures, a due time and her backup. The customer is told when to expect an answer.

→

Priya escalates
Past her limit, deciding is refused: "Escalate it." The ask goes to Tom with the facts, her note and the same due time.

→

Tom decides
Approve, offer something else, decline, or send it back to Priya with a note: "Offer 12% for three years paid yearly."

→

Alex tells the customer
By the promised time. The quote goes back to Alex to revise. Nobody types a price.

WHAT EVERY ASK HOLDS

- What is asked, and why, with the conversation so far.
- The figures: the quote, what was asked, and each person's limit.
- When it must be answered, and what the customer was told.
- The backup, who gets it at once if the person is Away or Off.

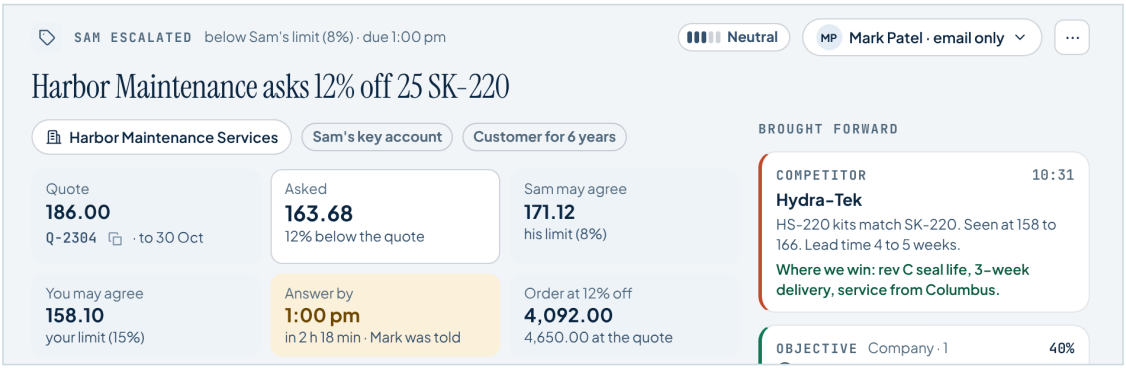
WHEN NOBODY ANSWERS

- Away or Off: the ask goes to the backup at once.
- Not answered in time: Sage reminds the person, then their backup.
- Silence is never a yes. The customer is never told yes by default.

WHERE PEOPLE ANSWER

Waiting, on the Rep Desk · The card on a call · Chat · Email · Slack · Teams · Their AI assistant · By telling Sage

Each person's limit for a kind of commitment, such as a discount, a price or a date, is set by an administrator in Setup, and nobody sets their own. A manager sees what was escalated to them and what is above a rep's limit, with all three limits on the ask.



An escalated ask on the Manager Desk: what the rep and the manager may each agree, shown with the made-up Northcott example. Product design with made-up data.

More in: **The desks**

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The same for every company. The guides hold the detail.

The rest works the same way for a software company as for a manufacturer. In brief here, with the guide that tells each in full.

PRODUCT OVERVIEW

Named workers, Sage and Tess

Alex, Jamie and Robin each own their accounts, with their own email address and phone number, shared by their clones. Sage coordinates and writes the daily brief. Tess loads your files and writes files back to your CRM every hour.

THE DESKS

Three desks on one frame

The Rep Desk, the Manager Desk and the Client operator Desk, with a phone in the browser. A manager can listen to and join any call on the team, and the rep always knows.

CHANNELS AND COMPLIANCE

Every channel, each country's rules

Website chat, email, phone, text and WhatsApp in one conversation, with the translation below the original. Singapore's disclosure, registry and holidays apply there.

CHANNELS AND COMPLIANCE

Lines and company numbers

A Desk line, the worker lines or your own phone, each shown with its number. Company numbers serve where a dedicated one is not right; each contact always sees the same one.

QUALITY AND THE LEARNING LOOP

Reviewed and improved

Every conversation scored on every side, a debrief after each, review sorted by mood drop, and lessons checked for conflicts before anyone approves them.

TECHNICAL ARCHITECTURE

Built to be trusted

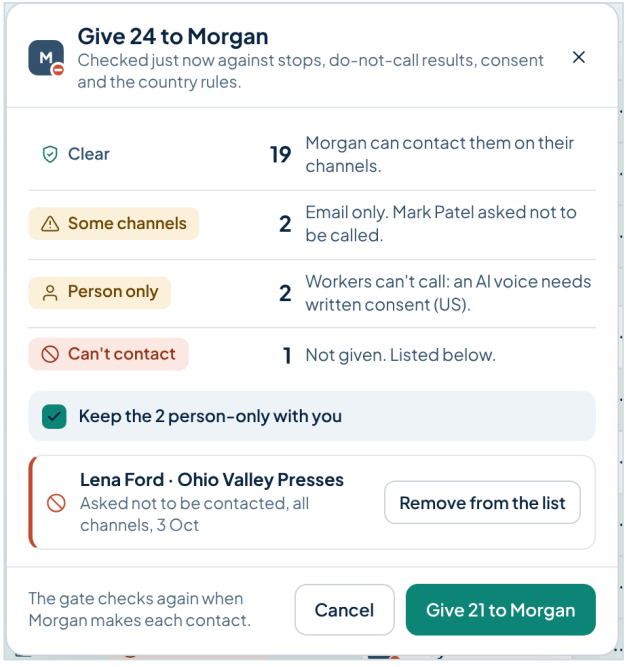
Your data stays yours. Corvair's access is for a set time, and every look is listed. A stop switch at four levels. Conversations are not used to train AI models.

CHECKED WHEN WORK IS GIVEN

Before a worker takes a list, the desk checks every person on it against stops, do-not-call results, consent and the country's rules. Each gets one result:

- Clear
- Some channels
- Person only
- Can't contact
- Waiting for a check

A person who can only be reached by a person stays with the rep. Whoever cannot be contacted is listed by name. The check runs again at each contact.



The check when work is given, shown with the made-up Northcott example. Product design with made-up data.

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Getting started.

A Corvair engineer or partner sets up the workers with your team. Your administrators decide how they behave and who they serve.

Your team
Sets behaviour, schedules and modes, people and their limits, channels and contact rules, and your ideal customers. Holds the stop switch.

A Corvair engineer or partner
Customises the pack and its rep profiles, loads your data, registers your pricing rules, loads your CRM's files and connects your calendars, then works through the readiness checklist.

What you provide
Your products and Price book, team and target account lists, pricing rules, access to your CRM and calendars, and the people who decide.

A PILOT STARTS VERY SMALL

One small role
For example, meeting setting for one segment of target accounts.

→

One process
Call each account on a list in the week before a visit, with one ladder.

→

One named worker
In assisted mode, for a set of accounts.

→

One owner
A person on your team who decides, reviews and says what comes next.

Widen it when the scorecard shows it is ready. Each step is your decision.

ROLES THE SAME ENGINE RUNS

Sales development · Inbound demo requests · Trial follow-up · Event follow-up · Customer expansion · Renewals · Onboarding · Customer success check-ins · Research and monitoring

Scope a pilot.

One small role, one process, on your own work. Start at

corvair.ai/cvw

THE CVW GUIDES

Product overview
What CVW is and is worth, the workers, Sage and Tess, the desks, trust, and how to start.

The desks
Working beside the workers: the Rep, Manager and Client operator desks and the phone.

Intelligence and prospecting
Sourced profiles, news, ideal customers, list building, competitors and supply chains.

Channels and compliance
Addresses, lines and company numbers, calls and texts, contact rules and countries.

Quality and the learning loop
Scores, debriefs, the coach, review, lessons, tests, the live watch and measured decisions.

Technical architecture
For IT, security and architecture teams: how CVW is built and run.

Industrial sales
The made-up Northcott Fluid Power example: a manufacturer and its distributors.

B2B inside sales
The made-up Veridane example: a software company selling to banks and insurers.

Every guide is at **corvair.ai/cvw**. Screens are product designs with made-up data.

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