

More first meetings with the right people. Every call learns something.

A virtual worker for B2B inside sales at technology companies.

It works your target accounts beside your sellers, and treats each account as a relationship, not a transaction.

WHAT IT DOES FOR YOUR SELLERS

Starts work from signals

Rules you set turn signals into work: an intent signal, a renewal date, a trial ending, usage near a limit, a champion who moves or an account gone quiet.

A ladder for every call

It asks for the meeting you want most first, such as the CIO, and moves down a step only when that is declined.

Learns on every call

Initiatives and their funding stage, competitors, new hires, referrals and corrections to what you knew, each with its evidence.

Answers inbound interest

Demo requests and trial sign-ups are answered and qualified in minutes, day or night.

Books real meetings

It checks your sellers' calendars before it offers a time, books it in the contact's time zone and creates the preparation items.

Owens its accounts

Each account belongs to one named worker, with its own email address and phone number, and one memory across calls, emails and chats.

WHAT STAYS WITH YOUR SELLERS

Decisions above its limits go to the named seller who owns them.

Prices come from your Price book, which prices subscriptions and licences per seat or plan, per month or year. Discounts, meeting times and pilot terms are checked against your rules before the worker offers them. Anything above its limits goes to the named seller as a request with the facts, a due time and a backup; they answer in CVW, by email, in Slack or Teams, or through their AI assistant. A prospect cannot talk the worker into an exception, because the worker is not the one deciding.

ONE CALL IN FIVE STEPS

Read

Before calling a bank's Head of AI and Data, it reads the profile, the objectives and the assumptions to check.



Ask

It opens with "Hi, I'm Alex, an AI assistant for Priya Raman at Veridane." Then it gives the real reason, a leadership visit next week, and asks for the CIO first.



Step down

The CIO is travelling. It accepts "I'll check" and books the contact and the new Chief Data Officer instead.



Learn

The new Chief Data Officer's name, an initiative budgeted for next year and the incumbent integrator.



Record

Step 2 confirmed, a possible upgrade, and a request to the account executive to send the invitation. All of it goes to your CRM.

The bank and its people are made up. The B2B inside sales guide tells this call in full.

Eight situations, inside your rules

The same worker covers inbound interest, existing customers and outbound calls, inside your rules.

EIGHT SITUATIONS, EACH WITH A LADDER

Meeting blitz around a visit

New account

Referral

Before the RFP

Existing customer

Competitive evaluation

A new case study

In the contact's language

Each has a ladder: the meeting asked for first, such as the CIO, then a fallback if that is declined, a follow-up with your account team within 30 days, and below that a callback. The worker never skips a step. The technology sales pack covers 28 situations in all, including inbound enquiries and demo requests, renewals, trials, upgrades and customer care.

INSIDE YOUR RULES, FROM A LIVE DESK

Contact rules. Before any outbound message or call, a check runs: do-not-contact, a recorded basis for contact, local hours, frequency limits and recent contact by your own sellers. A check that cannot run counts as no. Every chat, call and text opens with the AI disclosure the contact's country requires.

A live desk for every seller. What waits for you, the team's live conversations and the account in front of you, with Watch, Nudge, Join and Take over. A site window holds everything else.

Assisted by day, automated after hours. People first in business hours. After hours the worker runs under tighter limits, and urgent matters go to the person on call.

Stop switch and your data. A stop switch per worker or deployment cuts off all access and hands live conversations to a person. Export your data at any time. Conversations are not used to train AI models.

Duplicates One message per person, whatever lists they are on.	Contact rules Checked again at the moment each message goes.
☐ Same email address Always removed -22	☐ Asked not to be contacted Always applied, in the scope they asked for -9
☒ Same person, different emails Matched on name and company -8	☐ No basis for contact Nobody is contacted without one -9
☐ One person per company Keeps the main contact, for account-based outreach 8	☐ No approved country profile Workers only contact countries with one -3
See examples	☒ Contacted in the last 14 days By anyone, including your own email and the CRM -16
	☒ In another running campaign One message a week across all campaigns -9
	☒ Prefers a person Goes to the account owner instead -3

Duplicates and the contact rules, each with the number of people it removes before a campaign starts. Product design with made-up data.

Sage and Tess

Part of every deployment, and always on. Sage balances work, coaches a worker privately and chases requests. Tess loads your files and writes files back to your CRM every hour.

Scored on every side

The ladder step reached, the account team's objectives, the contact's objectives, service quality and promises, with findings tied to quotes.

In the contact's language

It follows each contact's language, and your sellers see every turn translated into theirs.

Scope a pilot

Start very small: one segment of target accounts, one situation such as a meeting blitz before a visit, and one named worker. We scope the pilot with you and agree in advance the results that count.


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