Scored, reviewed and improved.

Every conversation is scored and debriefed. Review finds what goes wrong and what it costs. Lessons wait for a named person, each release is tested and watched, and CVW measures its own decisions.

WHAT THIS GUIDE COVERS

Scores and debriefs
Every question 1 to 5 with a reason, and a debrief after every contact.

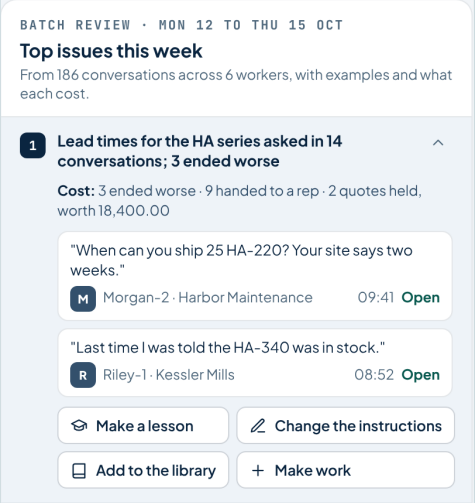
Coaching
On the Manager Desk, from the workers' debriefs. Reps are never scored.

Review
The queue by mood drop, and the top issues with what they cost.

Lessons
Proposed by Sage, a person or the coach, checked for conflicts, then approved.

Tests and the live watch
A release tested case by case, then its first live conversations watched.

Measured decisions
Sure answers act. Verdicts are counted, and CVW asks again if they disagree.



Top issues this week, with what each cost, shown with the made-up Northcott example. Product design with made-up data.

ONE WEEK OF THE LOOP

1. Workers hold their conversations. Each ends with an outcome, scores and a debrief.
2. Sage reads the week's conversations and ranks the top issues by how often they happen and what they cost.
3. Your client operator makes a lesson from the first issue, with its conflict check already run.
4. A named person approves it, and it applies from the next conversation.

Nothing reaches a worker until a person approves it.
Sage applies on its own only what restates facts you already hold.

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.

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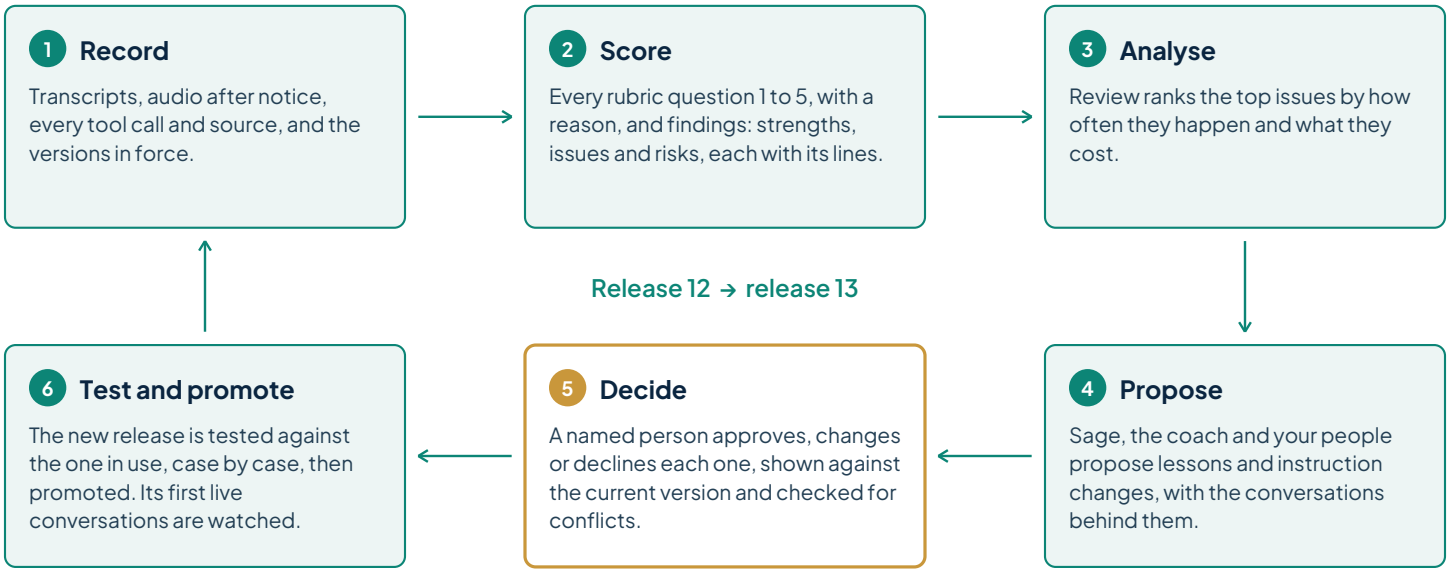
The loop. Find it, fix it, prove it.

Every conversation is recorded, scored and reviewed. What the reviews find becomes a proposed change. A person accepts it, and it is tested before it goes live. Sage runs the loop; your people decide.

SIX STEPS, EVERY WEEK



WHO DOES WHAT IN THE LOOP

Who	Their part	Where
Sage	Writes each debrief, runs the weekly review, ranks the top issues and proposes lessons. Applies only what restates facts you already hold.	Every desk
The coach	Writes a debrief and up to six recommendations from a person's comment, or from a finding across many conversations.	Any conversation
Managers	Coach workers and reps from the conversations that were nudged, joined, taken over or ended worse. Comment, and make notes for a worker.	Manager Desk › Coaching
The client operator	Works the review queue, makes lessons from top issues, and approves lessons and instruction changes.	Client operator Desk › Review and Lessons
A Corvair engineer or partner	Tests a new release against the one in use and promotes it. Rolls back only when a person decides.	Workbench

Real unless declared

Everything is real unless a conversation is declared training, where a person plays the customer, or simulation, where CVW does. Neither is ever counted in a worker's results.

No step waits on one person

You name who accepts lessons and who coaches, each with a backup. The activity reports show where anything waited.

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Every conversation scored on every side.

When a conversation ends, it is scored. Each answer has its reason, with the transcript lines that show it.

FIVE THINGS SCORED

Your company
The goal steps for the situation.

Your account team
Progress on its objectives for the account.

Your customer
Their stated and unstated objectives, met or not.

Service quality
Accuracy, clarity, responsiveness, politeness.

Promises
Made, and kept.

EACH QUESTION, 1 TO 5

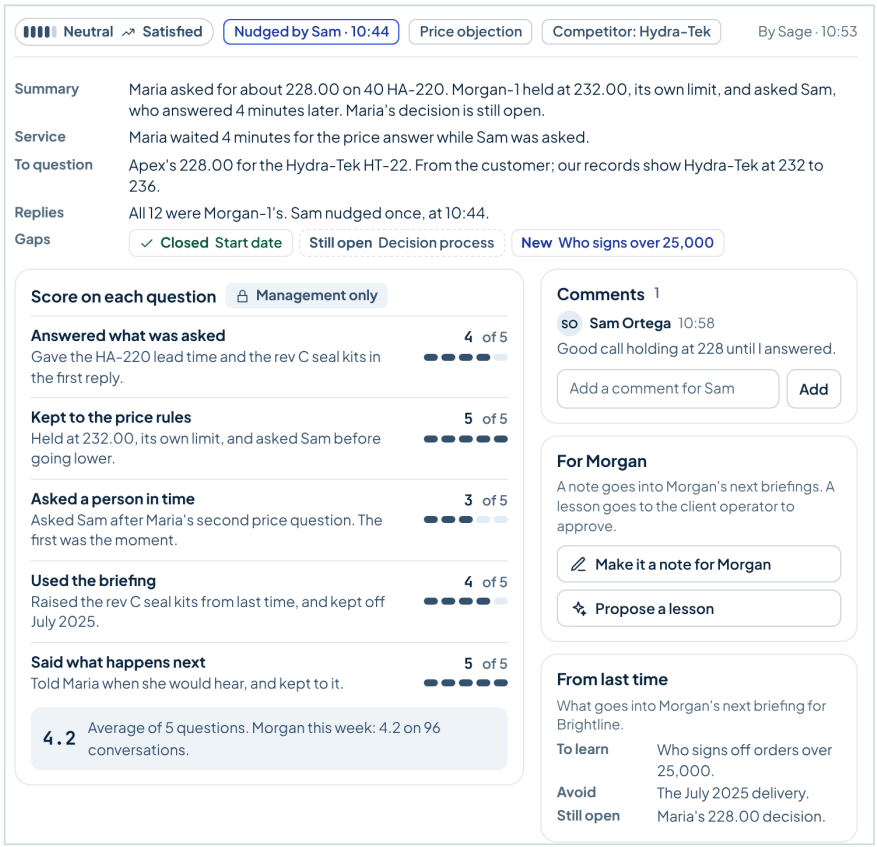
Each question of the rubric is answered 1 to 5, with a reason. The rubric is a file your administrator can edit. Findings add three to eight items, each a strength, an issue or a risk, with its lines. The customer's own survey answer sits beside the scores.

THE OUTCOME

How far the conversation got, from no outcome to the step the situation aims for. Each ended conversation records whether the step is **confirmed** or **tentative**, how a tentative step will be confirmed, an upgrade left open, a stop, and whether the customer said no or refused the contact, each with the line that shows it.

Who sees the scores

A worker's scores, the reasons and its debriefs are seen by the rep it works for, its supervisor and management. Any view that compares workers or people, or adds them together, is Management only. Reps are never scored.



The score on each question with its reason, beside the debrief, shown with the made-up Northcott example. Product design with made-up data.

MOOD, AT THE START AND AT THE END



Read at the start and end of each conversation, and shown live as "Neutral now". The change is part of the score, and review sorts by the drop. The example started neutral and ended satisfied.

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No score in front of a worker. A tag is not a score.

No score, target or reward drives a worker. During a contact it sees where the conversation stands. After it, the debrief goes back to the worker in words. Tags say what a conversation holds, so people can find it and act on it.

SHOWN TO THE WORKER ON EVERY TURN

Goal step
The step reached in this situation, and the next one.

Objectives
The account's objectives in priority order, each done or open.

To learn
What it set out to learn, each item learned or open.

To check
The doubtful lines from the briefing, each raised or not.

From last time
The next briefing for the account carries this, in three lines at most:

1. What to learn or do differently
2. What to avoid
3. What is still open

When a person took part
A conversation in which a person nudged the worker, joined or took over is tagged, with who and when. The debrief says which replies were the person's, and scoring leaves them out of the worker's result.

THREE KINDS OF TAG

SET AS IT HAPPENS

From what happened
A person nudged, joined or took over. A request was raised. A promise was made. A stop was given. The campaign, the channel and the language.

SET AFTER THE CONVERSATION

From what was mentioned
A product, a part number, a quote or order number, a competitor, a named person, or a keyword you set.

SET WITH THE DEBRIEF

From what was said
A price objection, a complaint, a delivery problem, a referral, a contract question, a wish for a person, or a remark about AI.

TAGS THAT SEND A CONVERSATION TO REVIEW

- The customer ends worse than they started, or ends angry.
- They complain, say they may leave or mention legal action.
- They say anything about AI assistants.
- They ask for a named person, or say how to be served.
- The worker broke an always or never rule.

ONE GLOSSARY, NO NEW TAG WITHOUT A SEARCH

One list of tags for each company, each with its name, definition, other names and examples. Before a new tag is made, the glossary is searched by name and by meaning. Only when nothing fits is one proposed, and a named person accepts, merges or dismisses it. Merging keeps the history of both.

A tag is not a score.
It says what a conversation contains. Filter by it, review by it, and let it start work by a rule, such as "a complaint goes to the account owner".

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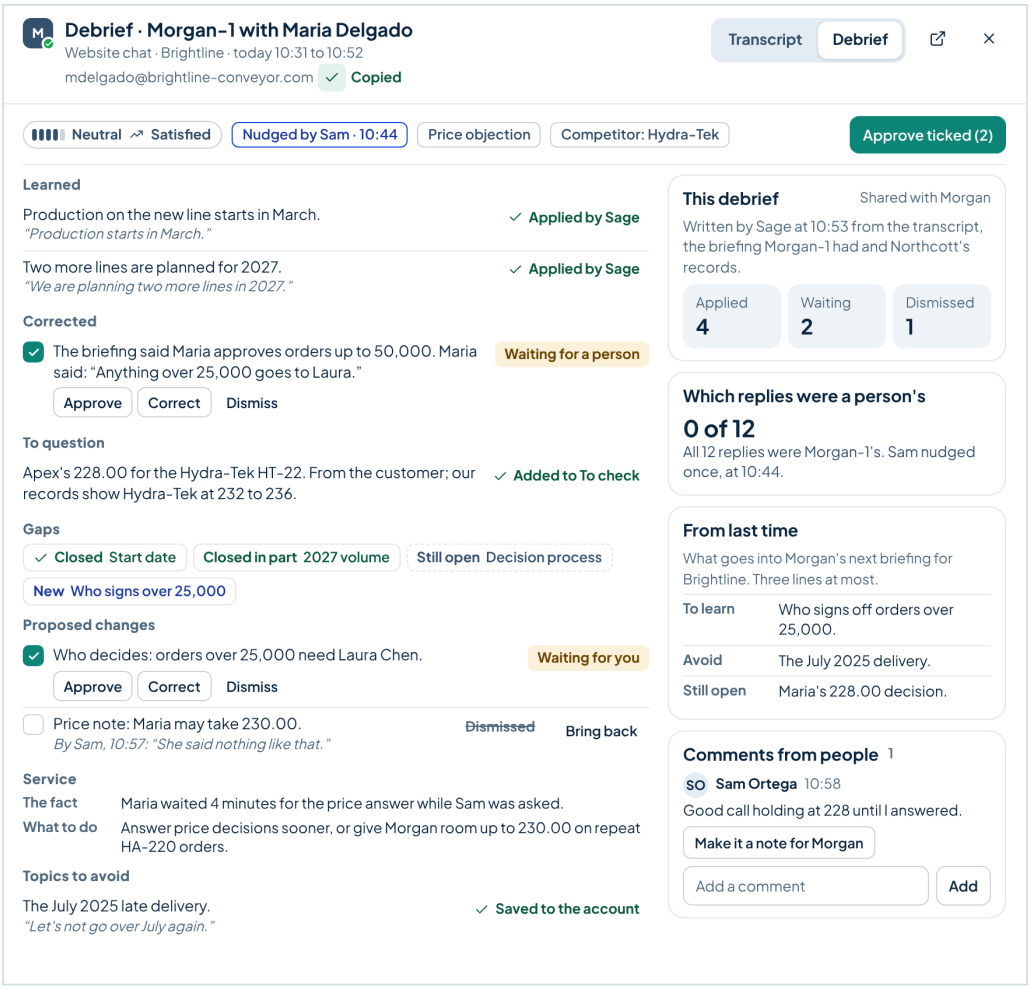
A debrief after every contact.

Sage writes the debrief from the transcript, the briefing the worker had and your records. What only restates what you hold is applied at once. What could be wrong waits for a person.



A debrief of a website chat, with what Sage applied and what waits for a person, shown with the made-up Northcott example. Product design with made-up data.

APPLIED, WAITING, DISMISSED

Applied by Sage

Facts that restate what the customer said and what you already hold. In use at once.

Waiting for you

A correction to the briefing, a change to who decides, a new gap. Approve, Correct or Dismiss.

Dismissed

Kept with who dismissed it and why. It can be brought back.

Comments from people

Anyone with access can comment, with their name and the time. A comment does not change the debrief, and can become a note for the worker or a proposed lesson.

THE SECTIONS OF A DEBRIEF

Section	What it holds	Section	What it holds
Learned	New facts, each with the customer's words.	Proposed changes	A change to the account, the people map or an objective, for you to approve.
Corrected	Where the briefing was wrong, and what the customer said.	Service	A fact about the customer's experience, then what to do. Never written as a failing.
To question	A claim the records do not support, added to what to check next time.	Topics to avoid	A subject the customer does not want raised, saved to the account.
Gaps	What the call guide set out to learn: closed, closed in part, still open or new.		

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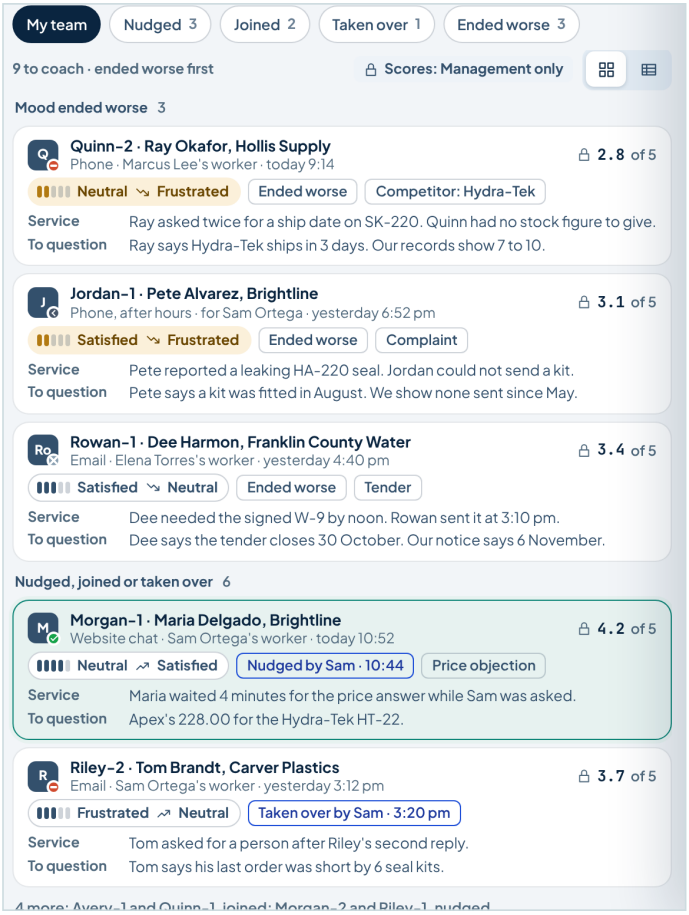
Coaching on the Manager Desk.

A manager coaches from the conversations where a person stepped in or the customer ended worse. Workers are coached through notes and lessons. Reps are coached in words, and are never scored.



Coaching for one team this week: ended worse first, then nudged, joined or taken over, shown with the made-up Northcott example. Product design with made-up data.

WHAT COACHING LISTS

- **Workers:** conversations on the team's accounts that were nudged, joined, taken over or ended worse, ended worse first, each with the mood from start to end, its tags, its average score and the debrief's first Service and To question lines.
- **Reps:** conversations a rep took part in, to comment on. No score is shown or kept.

OPENING ONE

- The debrief, and the score on each question with its reason. The screen marks it Management only because the manager reads it as management.
- Make it a note for the worker: it goes into the worker's next briefings for that account.
- Propose a lesson: it goes to the client operator to approve.
- For a rep, "What to practise": a comment the rep sees in the debrief.

Coach this conversation

A person adds a comment, and the coach writes a debrief and up to six recommendations: a change to the instructions, a lesson, or a note for Corvair. The person ticks the ones they agree with. The coach can also work from one finding across many conversations.

WHO SEES THE SCORES

What	Who may see it
Activity of people and of workers: what was done, by whom and when	Anyone with access to those accounts.
A worker's scores, the reasons behind them, and its debriefs in full	The rep the worker works for, its supervisor and management.
Any view that compares workers or people, or adds them together	Management only. You name management in Setup. Reps are never scored.

Coaching given to a worker in chat becomes a note too, confirmed in the chat and visible to its supervisor, who can change or remove it.

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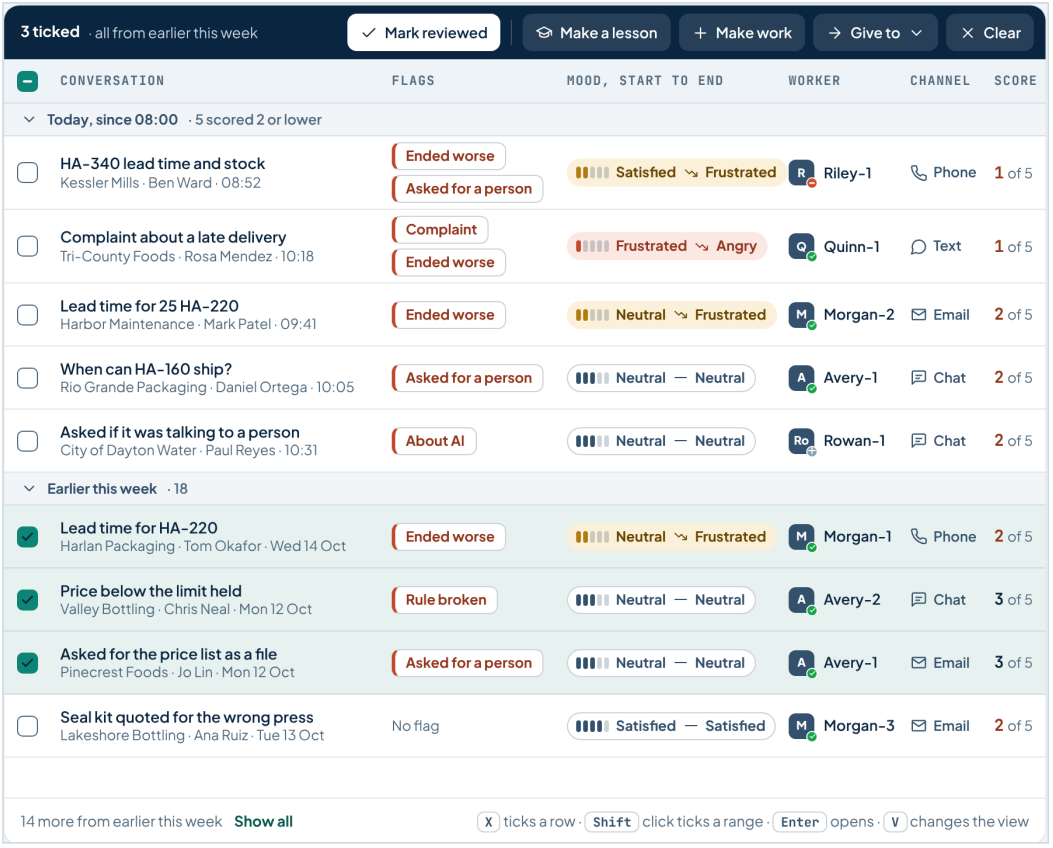
Review: what went wrong, and what it cost.

On the Client operator Desk, Review holds every conversation that needs a person's eye. Sage's weekly review reads them all and ranks the top issues by how often they happen and what they cost.



The review queue, sorted by mood drop and flag, shown with the made-up Northcott example. Product design with made-up data.

THE QUEUE

- Sorted by mood drop, start to end, then by flag.
- Filter by flag, score, worker and channel.
- Each row: the conversation, its flags, the mood, the worker, the channel and the score.
- Tick many: Mark reviewed, Make a lesson, Make work, or Give to.

THE WEEKLY REVIEW

Pick a period
Any period, or every Monday on a schedule.

Filter
Worker, channel, situation, outcome, mood or tag.

Read every match
Sage reads every matching conversation, not a sample.

Top issues
Each with how many, what it cost and examples.

Act
Make a lesson, change the instructions, add to the library, or make work.

What an issue cost

Conversations that ended worse, handed to a rep, and quotes held with their value. For example: lead times asked 14 times, 3 ended worse.

Add to the library

When the answer belongs in a document, the issue becomes a library gap, so the document is written once for every worker.

Change the instructions

A change to what the workers are told, shown against the current version and waiting for approval like a lesson.

The Client operator Desk in full: **The desks**

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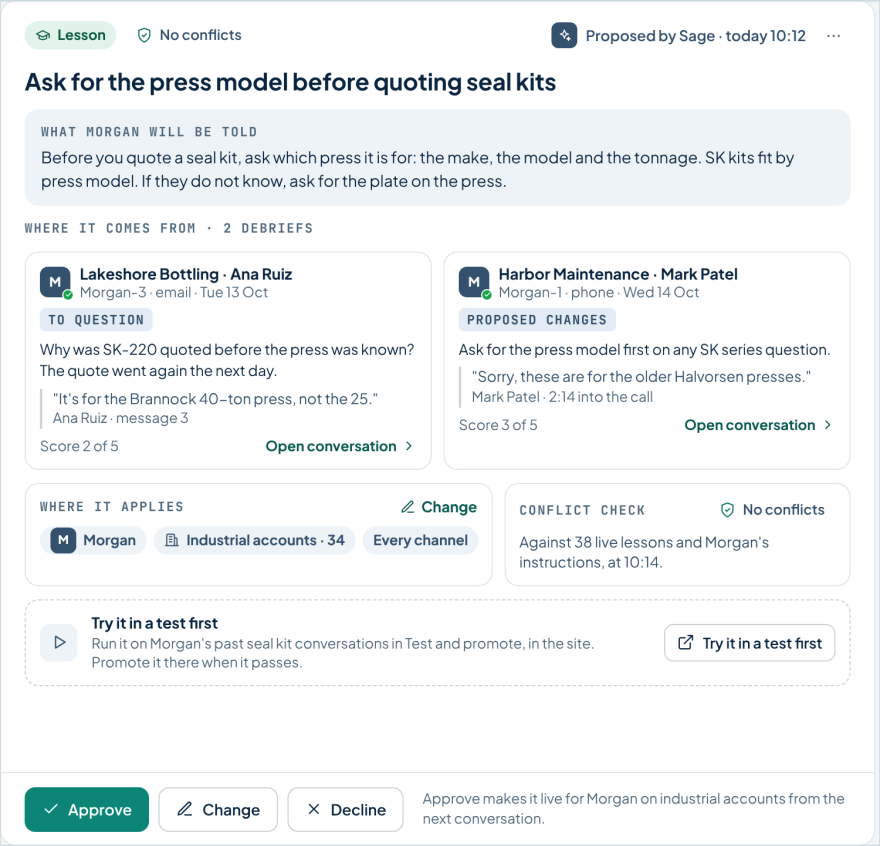
Lessons, checked before you decide.

A lesson tells a worker what to do in a situation. An instruction change alters what every worker in its scope is told. Both wait for a named person, with the evidence and the conflict check in view.



A lesson proposed by Sage from two debriefs, with where it applies and its conflict check, shown with the made-up Northcott example. Product design with made-up data.

WHAT EACH ONE SHOWS

- The words the worker will be told.
- Who proposed it: Sage, a person or the coach.
- Where it comes from: the debriefs and their lines, such as “From the debrief of Morgan-1 with Maria · Proposed changes”.
- Where it applies: the workers, the accounts and the channels.
- The conflict check, run when it is proposed, so you see it before you decide. It runs again at Approve.

YOUR CHOICES

Approve, Change the words then approve, or Decline. Tick several and approve them together. Try it in a test first. Approve makes it live from the next conversation.

FROM A FINDING TO A LESSON

A debrief’s proposed change
A top issue in review
A manager’s coaching note
The coach’s proposal

→ **Proposed** — With its evidence and conflict check → **Approved** — By a named person, against the current version → **Applied** — From the next conversation

EACH FIX GOES TO WHERE IT BELONGS

A price	**A fact**	**A limit**	**A behaviour**
→ The price rows	→ The library or the account	→ Settings	→ A lesson

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Simulation first. Then test and promote.

A change is proved before customers meet it. CVW plays the customer in simulation, and a new release is tested against the one in use, case by case.

SIMULATION, INBOUND AND OUTBOUND

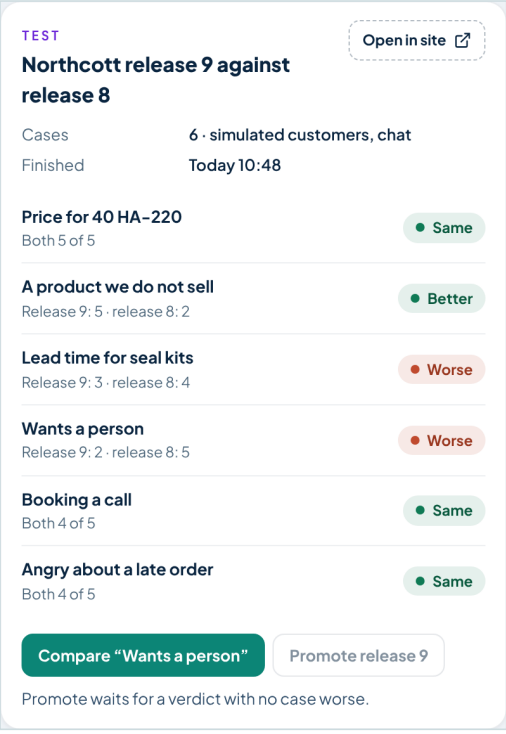
- Before go-live, product and situation questions run in simulation and are scored. Gaps become library uploads or playbook changes.
- Outbound too: CVW plays the contact, an assistant who may book a time or put the call through, a voicemail, or a wrong person who may name the right one.
- Simulated customers vary by segment, with dials such as sceptical or short on time, and answer the survey in character.
- Replays of recorded calls score the worker against what your person did.

TRAINING AND SIMULATION, ON THE LIVE SYSTEM

Training
A person plays the customer. For sales demos and for training your people.

Simulation
CVW plays the customer, to find weak spots and prove a new release.

Held, then saved or discarded
What the worker would have done is held. Nothing reaches a customer or a system unless a person saves it.



A test of release 9 against release 8, case by case, shown with the made-up Northcott example. Product design with made-up data.

TEST AND PROMOTE

A Corvair engineer or partner builds each release: the instructions, lessons, playbooks and settings in force. Before it is promoted, it runs the same cases as the release in use.

Same cases
Each case runs on both releases.

→

Compared
On the customer’s side and on yours.

→

Held or promoted
One case worse for the customer holds it back.

The customer’s side comes first
A release that wins more orders but leaves one customer case worse is held back until that case is fixed.

Try a lesson the same way
“Try it in a test first” runs a lesson on the worker’s past conversations of that kind before anyone approves it.

Promoted by a person
A Corvair engineer or partner promotes the release when every case passes. The live watch on the next page starts at once.

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The live watch. Results counted once.

A promoted release is watched in its first live conversations. A fixed list of key events records what each worker achieves, once, with its evidence.

THE LIVE WATCH

Promoted
Release 13 goes live.

→

Watched
Its first 30 scored live conversations.

→

Compared
With release 12 on the same measures.

If it does worse, the engineer and the client operator are told, with Roll back. Nothing is rolled back without a person.

KEY EVENTS, EACH WITH ITS EVIDENCE

- Order request taken
- Quote accepted
- Dormant account reactivated
- Lead qualified
- Meeting booked
- Promise kept or missed
- New contact found
- Customer objective met
- Mood improved
- Request decided

Reported
A worker said it happened

→

Confirmed
Your own systems show it

Compared this week Management only

Compare: People | Workers

Your team's six workers, by conversations handled. Reps see their own workers' scores only.

WORKER	HANDLED	RESOLVED WITHOUT A PERSON	MOOD UP	PROMISES KEPT	AVERAGE SCORE
Morgan Sam Ortega · key accounts	96	74%	36%	31 of 32	4.2
Riley Sam Ortega · dormant accounts	88	80%	30%	22 of 22	3.9
Quinn Marcus Lee · distributors	61	66%	25%	17 of 19	3.6
Avery Dana Whitfield · mid-size accounts	54	76%	35%	14 of 15	4.1
Jordan Everyone · after hours from 5:00 pm	33	88%	30%	9 of 9	4.3
Rowan Elena Torres · public sector	22	68%	32%	6 of 6	4.0
All 6 workers For 4 reps	354	75%	32%	99 of 103	4.0

Handled: conversations it took part in.
Mood up: ended happier than it started.
Resolved without a person: closed with no person replying.
Average score: the debrief questions, 1 to 5.

Workers compared this week on the Manager Desk, Management only, shown with the made-up Northcott example. Product design with made-up data.

COMPARED

Results on the Manager Desk set each figure against the period before. Workers are compared on handled, resolved without a person, mood up, promises kept and average score. People are compared without scores.

Both are Management only.

Value, in two parts

Accomplishments, by a rule per event set with you, and activity: the time a person would have spent, at a rate you set. Shown separately, with the rules and events behind every number. A value rule can take value back, such as after a return.

Credit is shared

An outcome counts for the account's owner and the worker together. A person joining a conversation does not remove it. Training and simulation are never counted.

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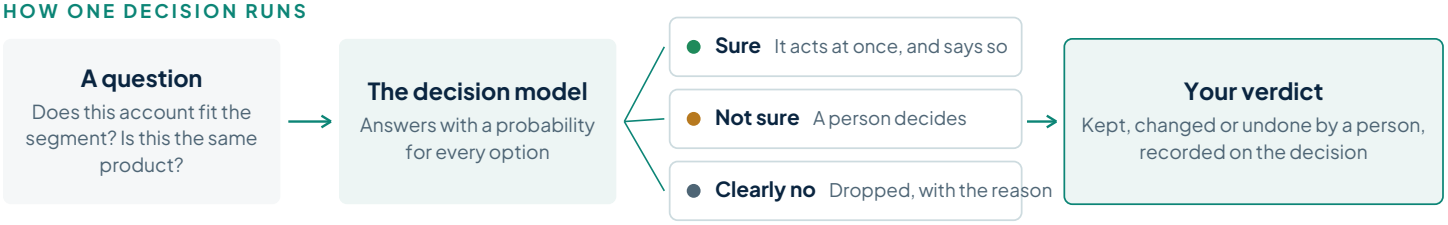
Decisions that measure themselves.

Many small judgements are made by a decision model. When it is sure, CVW acts at once. When it is not, a person decides. Every answer is kept with what your people later did, so CVW knows how often it is right.

HOW ONE DECISION RUNS



MEASURED, NOT ASSUMED WRONG

Acting from the start

Every kind of decision starts out acting on its sure answers. Decisions are taken as correct until measured otherwise.

One in twenty checked

Every twentieth sure answer of each kind is shown to a person with Right and Wrong, on the page where the answer shows.

Agreement counted

CVW counts how often the last 50 verdicts agreed with the model, for each kind of decision: “48 of 50 agreed”.

Falls back by itself

Below 95%, that kind of decision asks a person every time, and Corvair is told. It acts again only when Corvair switches it back.

WHERE DECISIONS ARE MEASURED

The decision	When it is sure	Where a person sees it
Does an account fit a segment?	Fits, or does not fit, with every answer kept as the reason	The account and Contacts › Accounts
Which role does a contact play?	The role and its part in buying	The people map
Does a list candidate fit? Is it a company you hold?	Added under “Added by CVW”, or shown as “Already held”	The list, with Undo
Does this person work there now?	Linked to the account with their role	The list
Is a competitor’s offering the same product?	Matched, with the features that agree	The competitor’s offerings, with Undo
Is an online listing comparable? Is a job posting useful?	Saved as a price seen or a dated fact, with its link	The product, the competitor or the account
Do a country’s official words support a rule?	“Checked against the official words”; a person still publishes	Corvair’s country profiles
Does a search passage answer the question?	Passages that do not are left out of what the worker reads	The worker’s tool record

Every answer is kept.
Each option’s probability, how sure the model was, what CVW did and what a person later said. If the model cannot answer, a second model answers the same questions in the same form, and the record says so.

Where these decisions are used: **Intelligence and prospecting** · **Channels and compliance**

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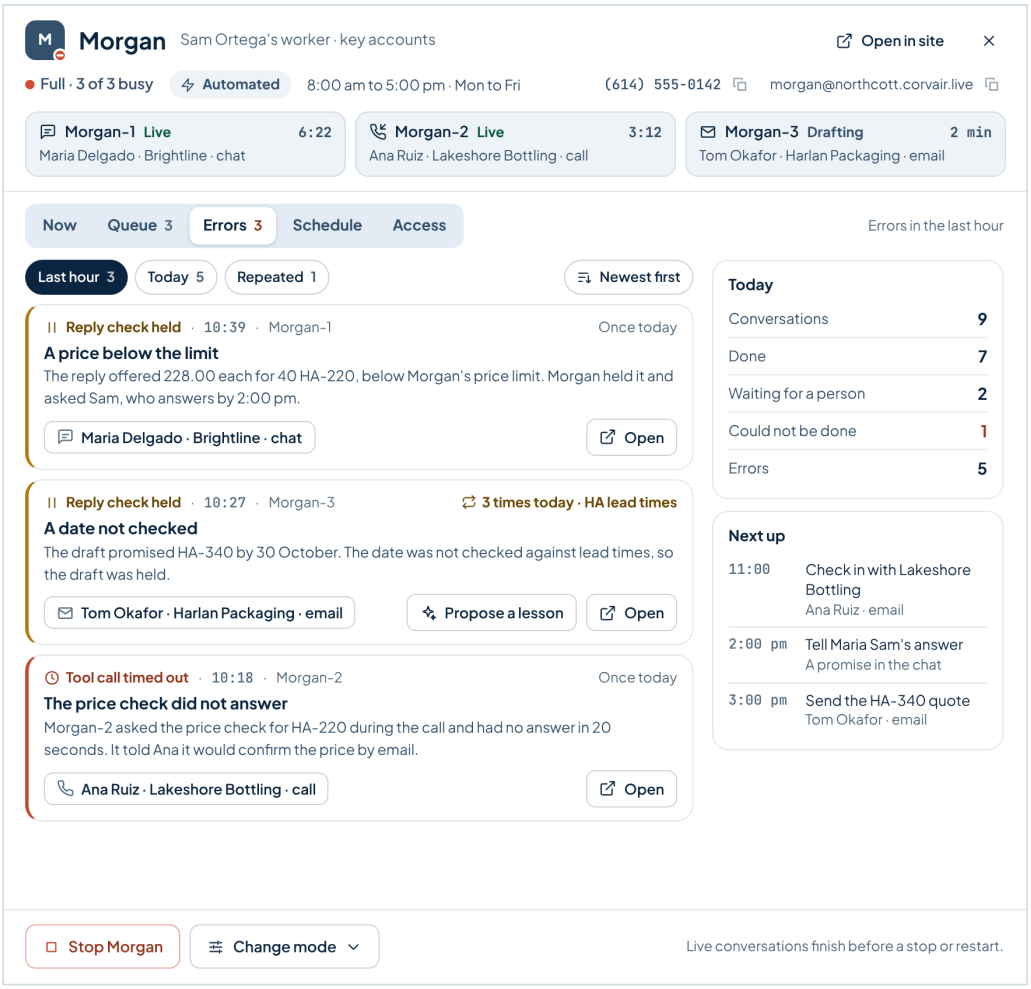
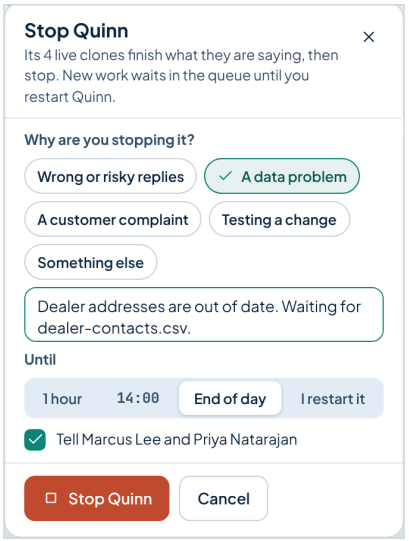
When a worker goes wrong.

Errors show in plain words, beside the conversation they came from, such as “Reply check held · a price below the limit”. A repeated error offers Propose a lesson. A worker can be stopped with a reason and a time.



One worker’s errors in the last hour, on the Client operator Desk, shown with the made-up Northcott example. Product design with made-up data.



Stopping a worker for a data problem, shown with the made-up Northcott example. Product design with made-up data.

STOPPED, THEN RESTARTED

Why, in a word and in your words; until one hour, a time, the end of the day or a restart by a person. Live conversations finish first, queued work waits and nothing is sent. The supervisor and their manager are told. At the time set, it restarts itself, as the person who stopped it.

The stop switch also covers a deployment, a company group and the platform. It never trips on its own.

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

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