THE CASE FOR A PILOT

Every account looked after. Every promise tracked.

A virtual worker for a manufacturer's inside sales desk

Corvair Virtual Worker looks after your customer accounts beside your team, and treats each account as a relationship, not a transaction. It follows up, answers, checks and asks. Your reps decide what is theirs to decide, your managers what is above a rep, from live desks that show what waits for each of them and what every worker is doing.

What it does for you

Every account has an owner.
Each account belongs to a rep and one named worker, such as Morgan, with its own email address and phone line. It remembers every conversation.

All three sides in view.
It holds your company's objectives, your account team's objectives and the customer's own, with a rule for when they conflict.

Promises kept.
Follow-ups happen on the day promised. Sage, the coordinator, chases every open promise and ask. Tess, the data steward, loads your files.

Prices checked, not guessed.
Every price, discount, date or term is checked against your own rules first. A rep decides up to their limit and escalates the rest to their manager.

Cover after hours.
After hours a worker answers every rep's line, alone and under tighter limits. Urgent matters go to the person on call.

Reviewed and improved.
Every conversation is scored on all three sides and debriefed. Nothing reaches a worker until your people approve it.

What stays under your control
Prices, discounts, dates and terms come only from your own rules. Anything above the worker's limit waits for the rep, and anything above the rep's limit for their manager. No setting turns off three rules: the worker says it is an AI (its greeting says it on every channel), it honours a request not to be contacted, and it never offers a commitment your rules did not return. The stop switch is pressed by a person. It never trips on its own.

Inside: Thursday 15 October at Northcott Fluid Power, a made-up manufacturer: a chat, a call, a price decision and a discount escalated to the manager. Then how to run, measure and start a pilot.

Meet the desk at Northcott Fluid Power.

Northcott, part of Northcott Group, makes HA-series hydraulic actuators and SK-220 rev C seal kits, and offers a press retrofit service and a press care plan. Four reps and six virtual workers share the accounts. Sage coordinates them, and Tess runs the data.

MANAGER

Priya Natarajan, sales manager
Runs the team from the Manager Desk. Approves discounts up to 15%.

Sam Ortega, sales rep
Key accounts, including Brightline. May agree a price down to 225.00 on the HA-220, or 8% off. Northcott's administrator.
Workers: Morgan, Riley

Dana Whitfield, account manager
Mid-size accounts. Sam's backup: an ask for Sam goes to her at once while he is away.
Workers: Avery

Marcus Lee, sales rep
Distributors. Backup for Dana.
Workers: Quinn

Elena Torres, sales rep
Public sector. Away from 10:15 today, with no backup set.
Workers: Rowan

FOR EVERYONE

Jordan, after hours
Answers every rep's line from 5:00 pm, in automated mode, under tighter limits.

PART OF EVERY DEPLOYMENT

Sage, the coordinator
Always on. Plans the day, briefs each worker and each rep, chases promises and asks, and writes the morning brief.

PART OF EVERY DEPLOYMENT

Tess, the data steward, with Grace Kim
Tess loads every file and writes files back to your CRM. Grace, the client operator, keeps CVW running.

One account, one worker. A customer always deals with the same worker. Morgan runs as many clones as the work needs, such as Morgan-1 and Morgan-2, inside a limit you set. The clones share its address and number. Workers are named by you, and can be renamed.

WHAT EACH SIDE WANTS ON THE BRIGHTLINE ACCOUNT

Brightline Conveyor Systems of Grand Rapids, Michigan, has been a key account for four years. Maria Delgado is its purchasing manager. Laura Chen, VP Operations, holds the budget for two new lines in 2027. Northcott has not met her yet.

COMPANY

Northcott Fluid Power

Move key accounts to rev C seal kits
3 of 8 accounts — In progress

Grow press care plans
2 of 6 this quarter — In progress

ACCOUNT TEAM

Sam Ortega

Only supplier through 2027
Priority 1 · 60% — In progress

Learn the 2027 line budget
Priority 2 · 30% — Open

Meet the VP of operations
Priority 3 — Not met yet

CUSTOMER

Brightline and Maria

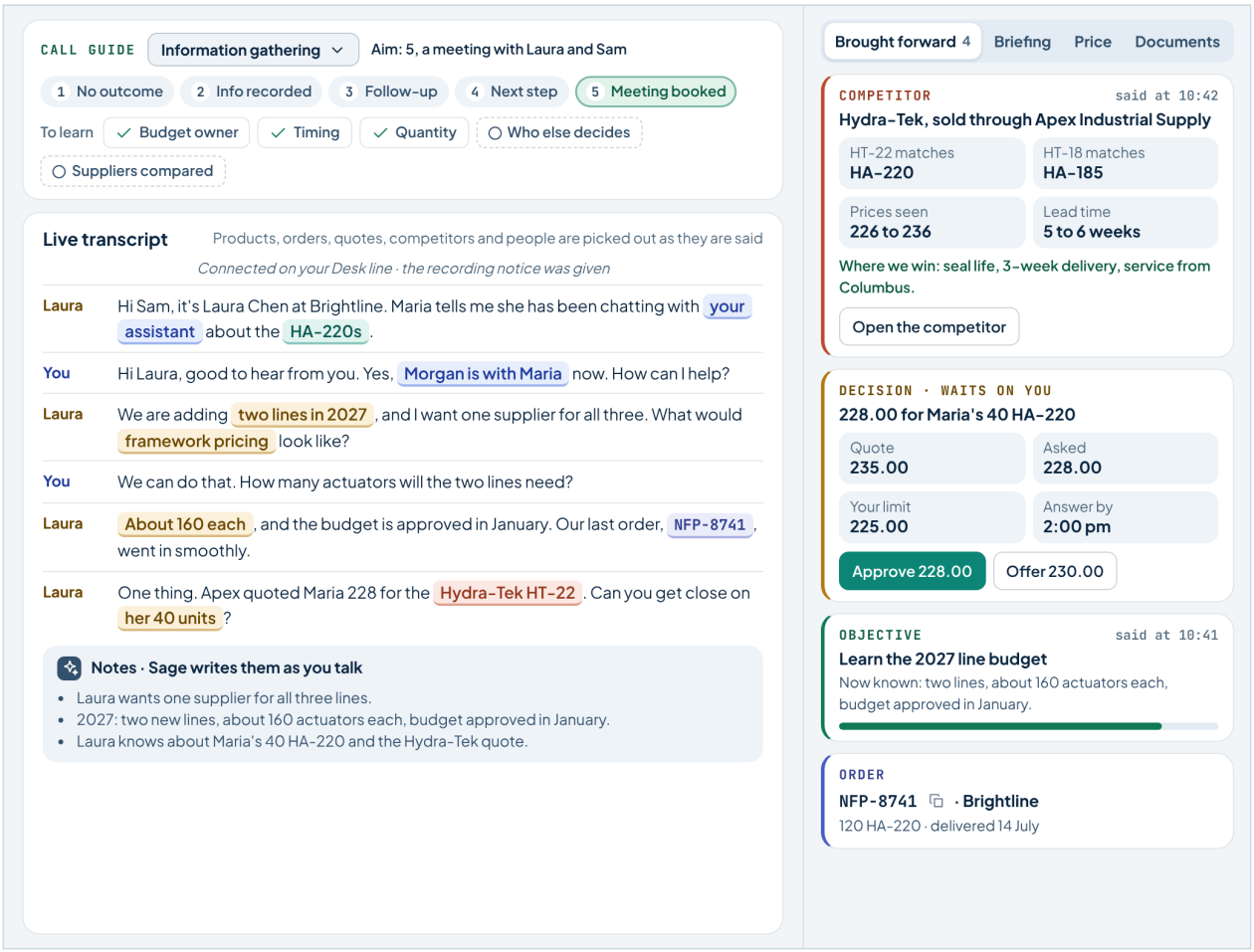
A price close to the distributor quote
Said by Maria, 15 Oct — With Sam

Fewer suppliers to manage
Said by Maria, 2 Sep — In progress

Thursday 15 October, 10:36.

Two people from Brightline reach Northcott within six minutes: Maria Delgado by website chat, and Laura Chen by phone.

10:36	Chat	Morgan-1 is chatting with Maria about 40 HA-220. "We have a distributor quote at about 228.00. I would rather keep this with you, but I need to be close."
10:38	Asks Sam	Quote Q-2291 is 235.00 each, valid to 29 October. Morgan may agree 232.00 on its own, so it asks Sam, with an answer by 2:00 pm, and tells Maria when she will hear.
10:42	Ringing	Laura Chen calls Sam's Desk line. The ring card says she has not met Northcott, holds the budget for two new lines in 2027, and what not to mention: the price limits and Maria's open ask.
10:42	On the call	Laura wants one supplier for all three lines, about 160 actuators each, budget approved in January. Apex quoted Maria 228 for the Hydra-Tek HT-22. Sage writes the notes as they talk.
10:49	Wrap-up	Meeting booked with Laura and Sam, Tuesday 20 October, 10:00 am. Framework prices for about 320 HA-220 go to Morgan to prepare, and come back to Sam to approve.

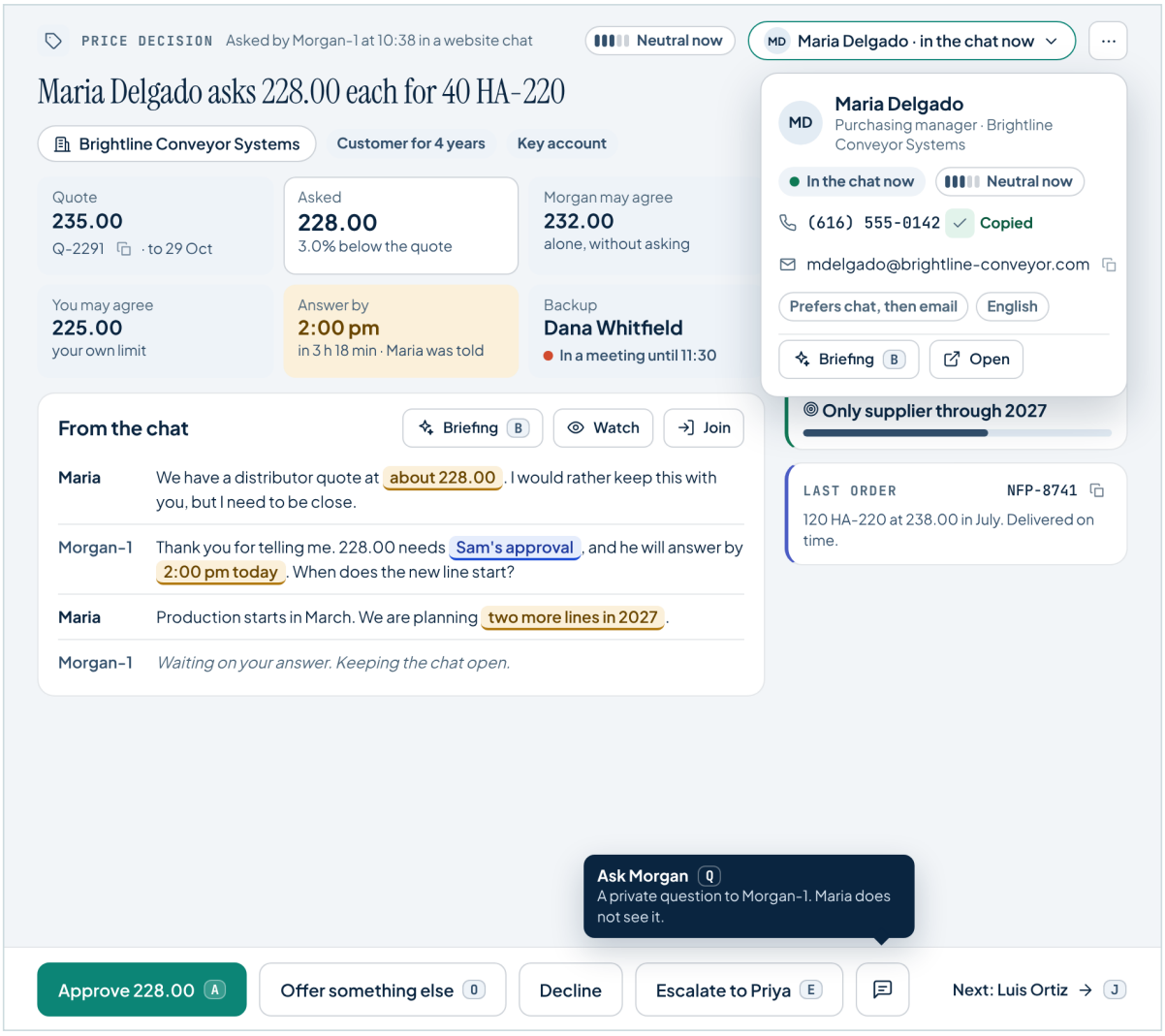


Sam's call: the call guide, the live transcript with products, orders, competitors and people picked out, Sage's notes, and Brought forward: the competitor and where Northcott wins, the decision on Maria's price, the objective moving and the last order. Product design with made-up data.

The phone, the call and the wrap-up in full: **The desks** · **Channels and compliance**

The decision comes to Sam.

228.00 is not Morgan's to agree, so it asks the rep whose account it is. The ask carries the facts, a due time and a named backup. Silence is never taken as a yes.



Waiting on Sam's Rep Desk: the price decision in focus with the quote, what Maria asked, what Morgan may agree, Sam's own limit, the answer-by time and his backup, beside the chat and Maria's card. Approve, Offer something else, Decline or Escalate. Product design with made-up data.

Sam may agree down to 225.00, so 228.00 is his to decide. Below his limit he would Escalate it to Priya with a note, keeping the due time. While he is Away, the ask goes to Dana at once. Sam can answer from Waiting, from the card on a call, in Chat, or by telling Sage.

Sam approves
From Waiting, he approves 228.00 for 40 HA-220, the price Maria asked for.

→

Morgan tells Maria
Morgan-1 gives Maria the answer in the chat, before 2:00 pm as promised.

→

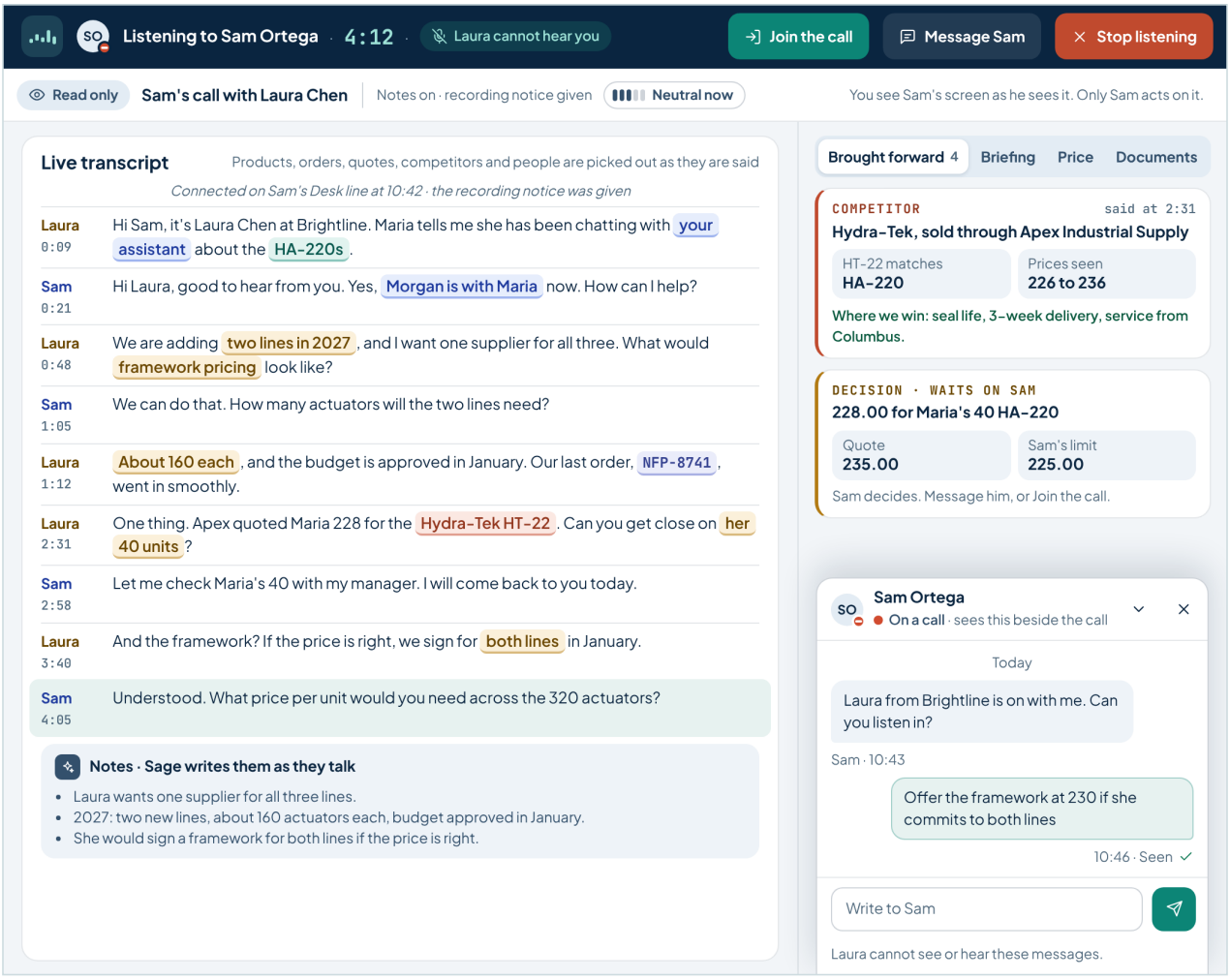
The quote is revised
Q-2291 goes back to Morgan, who checks every line again. Nobody types a price on a quote.

→

Counted when confirmed
An order Morgan takes is Reported. It is Confirmed when Northcott's systems show it.

Priya listens in, and decides above Sam.

Priya Natarajan runs the team from the Manager Desk. Sam asks her to listen to Laura's call. She hears both sides, Laura cannot hear her, and Sam sees that she is listening.



Listening to Sam's call: the listen bar with Join the call and Stop listening, Sam's call screen read only, and a chat with Sam that Laura cannot see: "Offer the framework at 230 if she commits to both lines." Product design with made-up data.

Listen, join, never take over

- Only a rep's managers may listen to the rep's call, and only after the recording notice.
- Sam's call bar shows "Priya Natarajan is listening".
- Join the call puts her on it: all three hear each other, and her words are written as hers. Leave the call drops only her.

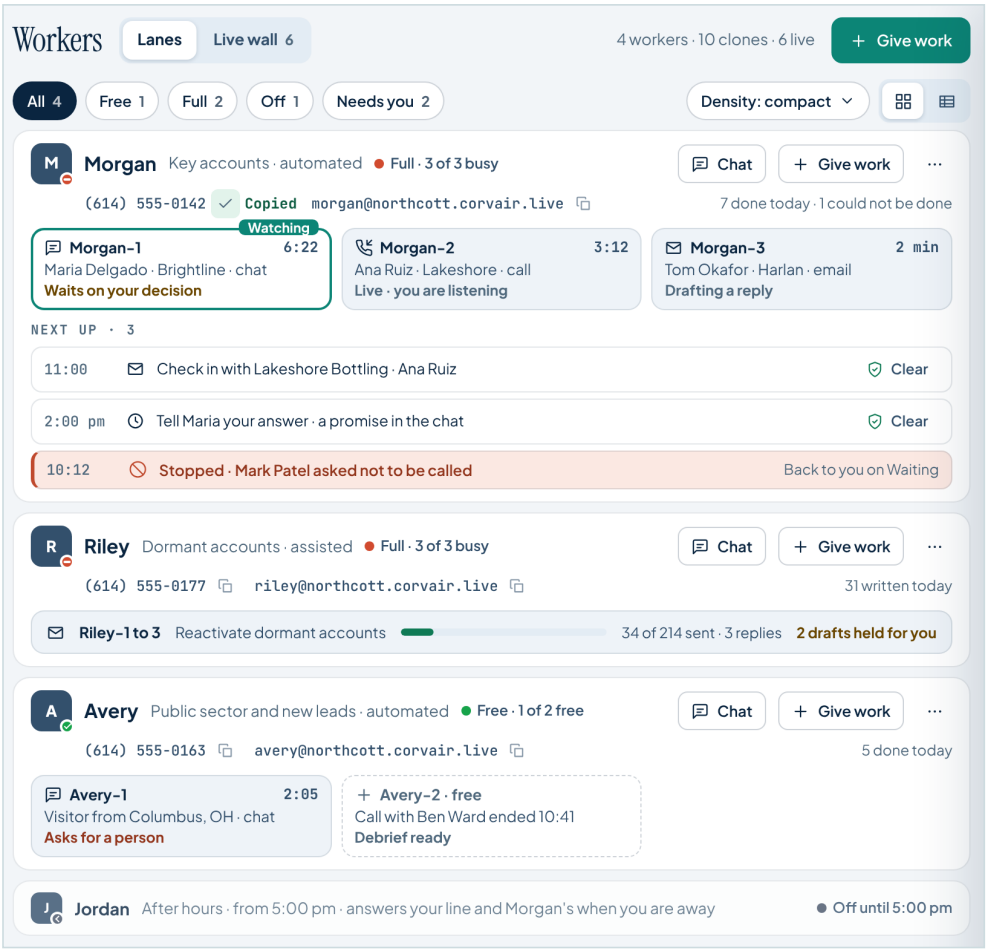
Sam escalates. Priya sends it back.

- Harbor Maintenance asks 12% off 25 SK-220. Sam may agree 8%, so he escalates with a note: these 25 are the first of about 300 next year.
- Priya may agree 15%. Her Waiting shows all three limits.
- She sends it back: "Offer 10% if Mark commits to the rev C changeover. I will back you on the rest." Sam sees "Sent back by Priya Natarajan".

Team now, gaps, coverage, coaching and results on the Manager Desk: **The desks**

Six workers, and Sage keeps them on track.

Sam oversees the workers on his accounts from Workers: each one's clones, what each is doing, what is next, and what was stopped. He can watch, listen, nudge, join or take over.



Workers on Sam's desk: Morgan with three clones busy, Riley's reactivation campaign with two drafts held for Sam, Avery free, and Jordan off until 5:00 pm. Product design with made-up data.

Sage's brief this morning

- Laura Chen has not met us. She holds the 2027 budget for two new lines.
- Harlan Packaging's order NFP-8790 ships late. Tom Okafor left a message at 9:55 am.
- Riley has written 31 of 214 reactivation emails. 3 replies need Sam.

Start here

Today opens on the one thing to do first: "Answer Maria's price: 228.00 for 40 HA-220", with Approve in place.

A nudge

Watching Morgan-1, Sam writes privately: "Mention the 3-week delivery and seal life if she pushes on price." Maria does not see it.

Clones

Morgan runs as many clones as the work needs, inside a limit you set. They share Morgan's address and number, so customers only see Morgan.

Assisted, automated or paused

Each worker's mode follows the calendar hour by hour. Assisted: a person approves what it sends. Automated: it sends on its own, within its rules. Paused: nothing new starts.

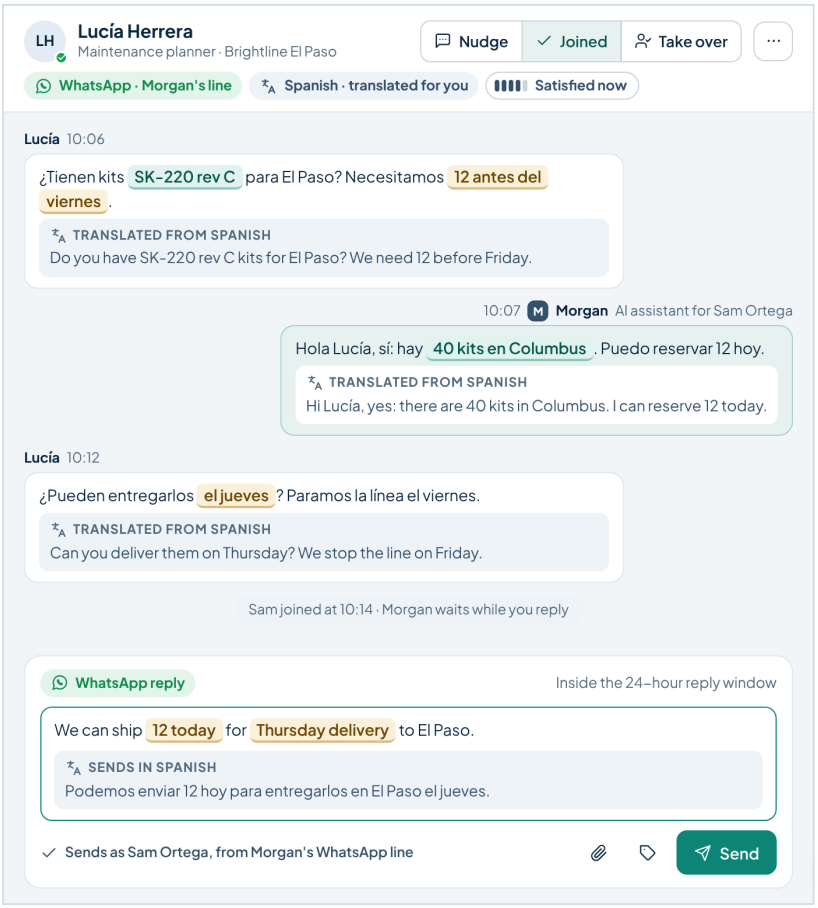
After hours and weekends

Jordan answers every rep's line from 5:00 pm, quoting list prices only and promising nothing before Monday. Sam can watch while off, and set "Ring me for urgent calls".

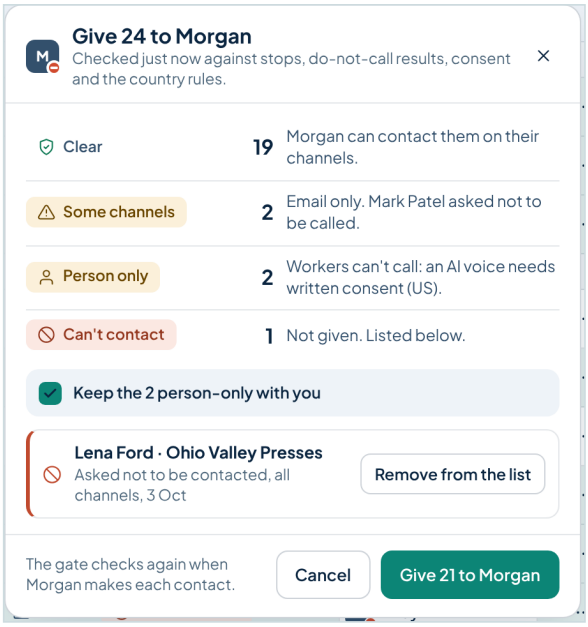
More in: **The desks** · **Quality and the learning loop**

Every channel, in each buyer's language. Checked first.

Lucía Herrera, Brightline's maintenance planner at its El Paso plant, writes on WhatsApp in Spanish. Before Morgan takes on any work, the desk checks that each person may be contacted, and how.



A WhatsApp thread in Spanish: each message translated below the original, Sam joined, and his reply sends in Spanish from Morgan's line. Product design with made-up data.



Giving 24 pieces of work to Morgan: each person checked against stops, do-not-call results, consent and the country's rules. Product design with made-up data.

Clear goes to Morgan. **Some channels** goes by the channels allowed. **Person only** stays with Sam: workers cannot call where an AI voice needs written consent. **Can't contact** is named, never dropped silently.

CHECKED BEFORE EVERY CONTACT

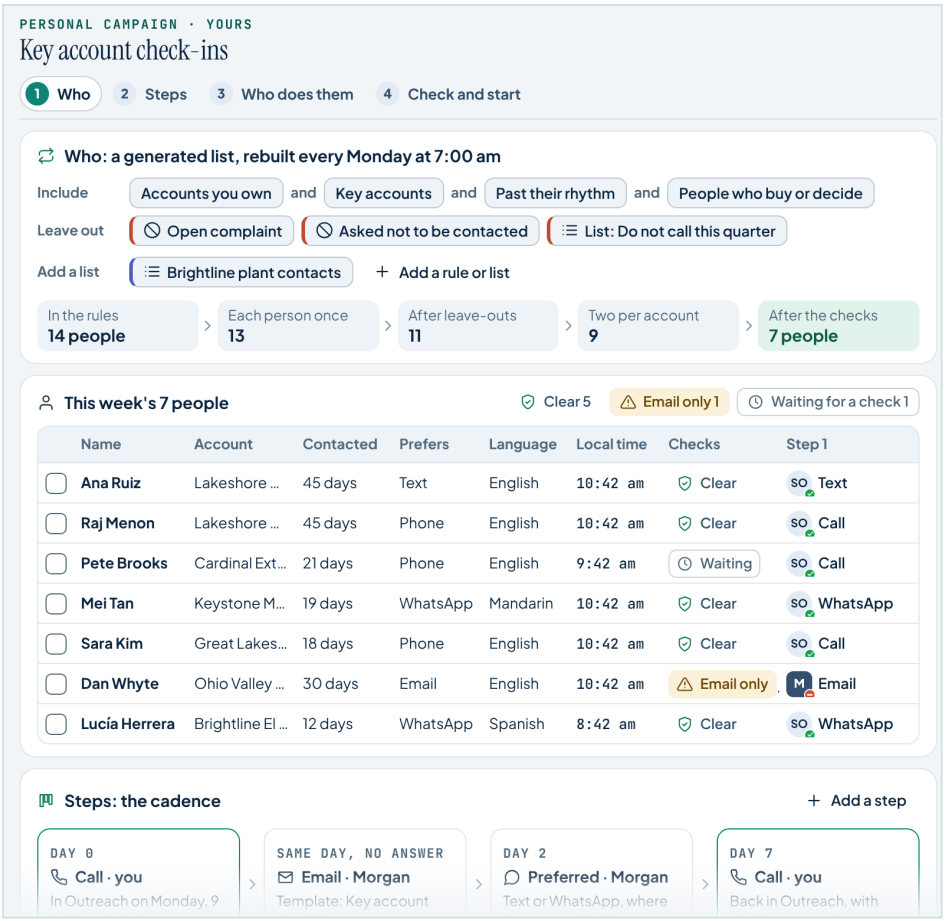
- Asked not to be contacted: always applied, in the scope they asked for.
- A recorded basis for contact, and consent for the channel used.
- The contact's local hours, the country's permitted hours and its holidays.
- One message a week to one person, across all campaigns. A promise comes first.
- Do-not-call registries where the country requires them. No second call after a no.
- Each person's preferred channel and language, and "prefers a person".

The checks run again at the moment of each contact. A check that cannot run counts as no. Every chat, call and text opens with the AI disclosure the contact's country requires, in their language.

Lines, company numbers, countries and registries: **Channels and compliance**

Work you go after, inside your contact rules.

Sam does not wait for the phone. A personal campaign rebuilds his list of key account check-ins every Monday, and his workers take the steps he gives them.



"Key account check-ins": a list rebuilt every Monday from rules, with how many each step leaves, this week's 7 people with their preferred channel and checks, and the cadence. Product design with made-up data.

Key account check-ins

- Include accounts Sam owns, key accounts past their rhythm, and the people who buy or decide.
- Leave out an open complaint, anyone who asked not to be contacted, and a "do not call this quarter" list.
- 14 people in the rules become 7 after duplicates, two per account and the checks.
- Sam calls 6; Morgan emails when a call is not answered, then uses each person's preferred channel.

Riley's dormant accounts

Riley writes to 214 past customers, in assisted mode, so Sam approves each draft from Mail before it goes. The plan ends on a reply, an order or a stop.

The expo follow-up

86 people from the October expo list, written by Avery from Tuesday.

Stop means stop

A stop covers the context it was given in: this call, this account or this worker, or wider when they say so. Mark Patel asked not to be called, so Morgan emails him. A STOP texted to a worker's number stops texts from that number, unless the country requires a wider stop. No setting switches it off.

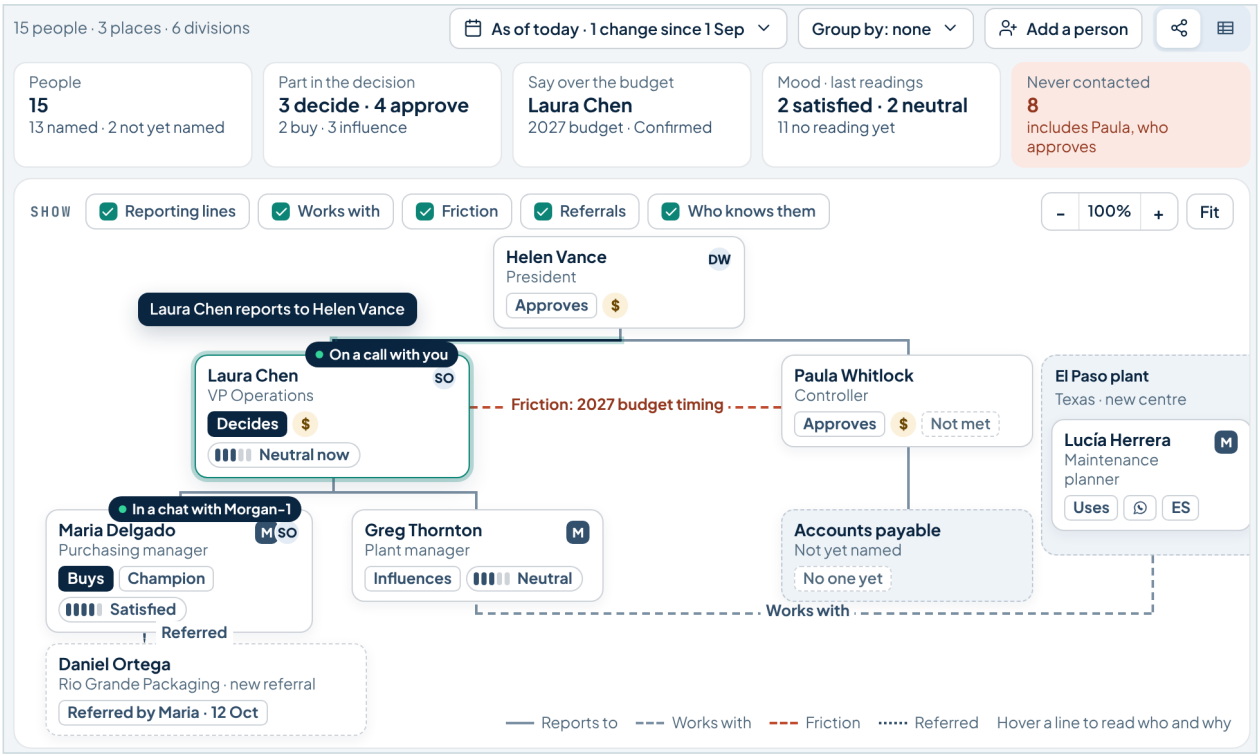
Some prefer a person

Tom Okafor at Harlan Packaging said on 14 October that he prefers a person. It is saved on his card, so the call back about his late order is Sam's to make, not a worker's.

Campaigns, lists and the checks in full: **Intelligence and prospecting** · **Channels and compliance**

One memory for each account, and the chain it sells into.

Morgan holds one memory for Brightline, across every conversation, channel and person. Every line names its source and its date, and a person can correct or remove any line.



Brightline's people map during Laura's call: who reports to whom, friction over the 2027 budget timing, a referral, and who decides, approves, buys, influences and uses. Eight people have never been contacted. Product design with made-up data.

Brightline sells to Harvest Lane Markets

Links record who sells to whom, and what flows. Harvest Lane, Brightline's own customer, is a prospect with a sell objective. When direct work starts there, Sam is told once, and a worker talking to Harvest Lane never discusses Brightline's orders or prices. Harvest Lane's news shows on Brightline too.

Which accounts fit

Northcott keeps its ideal customers as profiles with segments: machine builders, plants that run hydraulic equipment, fluid power distributors, and public works in Ohio. Brightline fits "Material handling and packaging machinery". The briefing says who is known and who is not: "Not known: a design engineer."

Sourced, and kept current

Each account's website and annual report are read into its profile, each line with its page. News is watched daily for key accounts, weekly for others. A person who moves is recorded on both sides, and both owners are told. Orders down 25% on last year turn health to Watch.

THE CHAIN, AS NORTHCOTT SEES IT

Northcott Fluid Power
Sells HA-220 actuators and SK-220 rev C seal kits to →

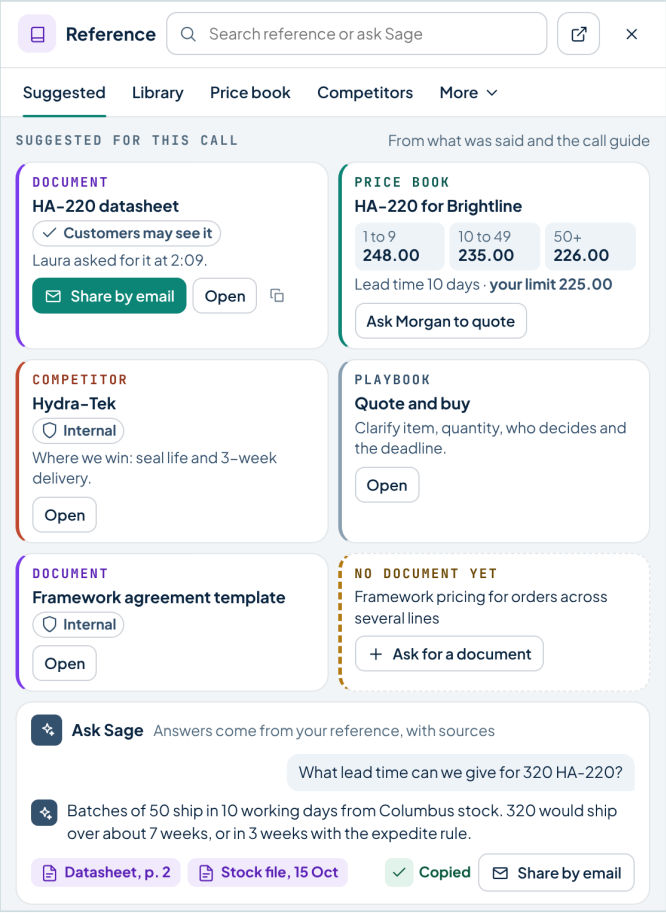
Brightline Conveyor Systems
A key account for four years. Builds conveyor systems, and sells them to →

Harvest Lane Markets
Brightline's own customer, and a prospect for Northcott with a sell objective. A "Harvest Lane suppliers" list, with a retain objective, keeps the channel healthy.

Profiles, ideal customers, list building and supply chains: **Intelligence and prospecting**

Prices, quotes and lead times you can promise.

Every price, discount, date and term comes from your own rules. On Laura's call, Sam opens Reference beside the transcript and asks Sage what lead time he can give for 320 HA-220.



Reference beside the call: the HA-220 datasheet to share, the price book for Brightline with Sam's limit, Hydra-Tek marked Internal, the playbook, a document still missing, and Sage's answer on lead time with its sources. Product design with made-up data.

The price check

- The HA-220 is 248.00 each for 1 to 9, 235.00 for 10 to 49 and 226.00 for 50 and over.
- Brightline has no contract price, so its 40 follow the standard price list. Where a customer has a supply agreement, the check applies its terms first.
- The lowest price that may be agreed shows only to people who may agree a price.

A lead time check, not a guess

- It answers when something can ship or arrive, from your plant lead times when loaded, otherwise the product's usual lead time, in business days around your closures and holidays.
- It says where the answer came from, such as "From your plant lead times, loaded 9:12 today".
- A date earlier than it can meet needs a person to agree. A worker's date is checked before it is said.
- A Corvair engineer can make a version that asks your own system first.

Formal quotes

From your own template, numbered, with the validity and the terms that must be on a quote. Each line shows "Ships by 4 Nov". A worker issues them up to a total you set.

Competitors, matched feature by feature

Hydra-Tek's HT-22 is matched to the HA-220 only when the same features agree; a difference, such as 2,800 psi against 3,000 psi, waits for a person.

Prices seen stay inside

Prices seen in conversations, or found online on demand for one product, are kept for Sam. A worker never says a competitor's price.

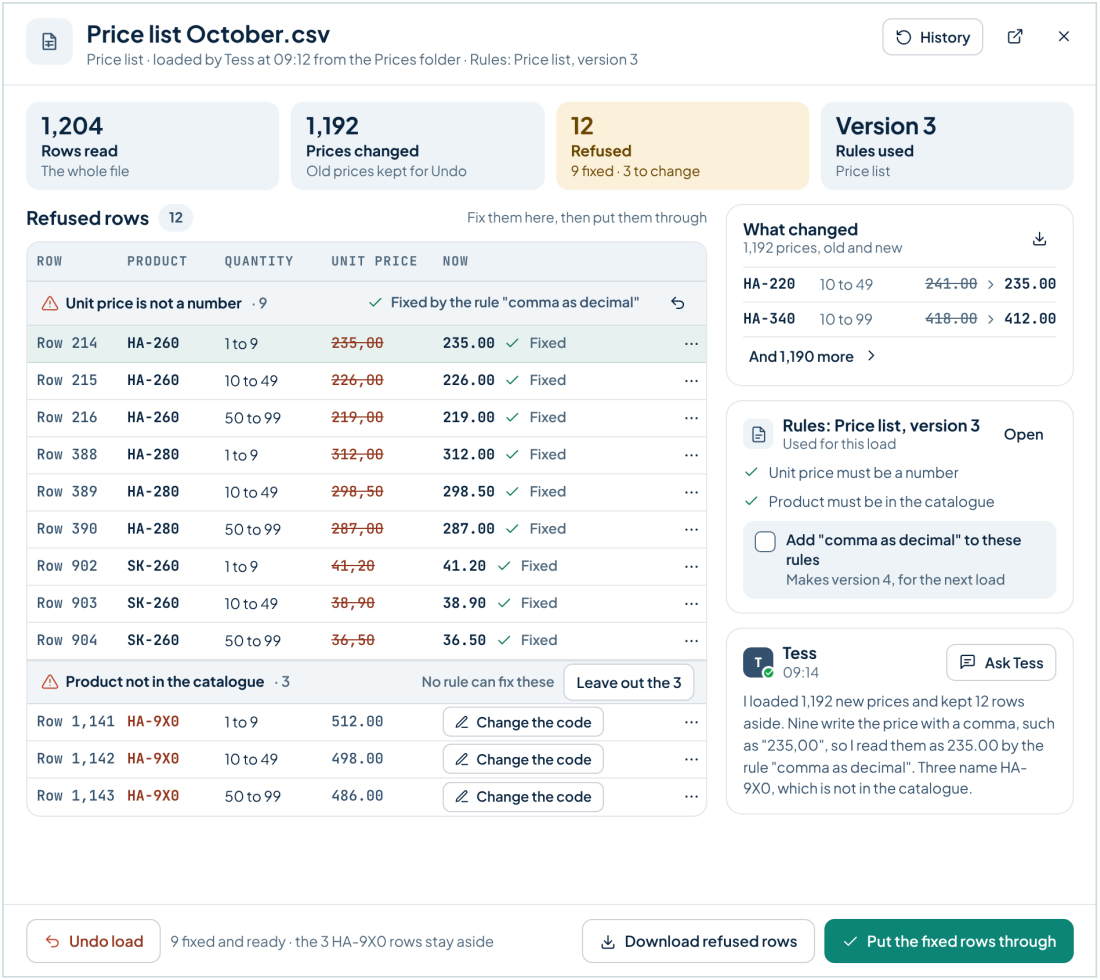
Made to specification

A product made to a customer's specification, such as Northcott's "Made to length" family, is never matched or priced against listings.

Products, competitors and lead times in full: **Intelligence and prospecting**

Your data comes in through Tess. Grace keeps it running.

Tess, the data steward, loads every file your team or your systems send, and checks every row before anything is written. Grace Kim, Northcott's client operator, works from the Client operator Desk.



1,204
rows read from the prices drop folder

1,192
prices changed. The old ones are kept for Undo.

12
rows refused: 9 written "235,00", 3 for HA-9X0, not in the catalogue

One load opened: Price list October.csv, loaded by Tess at 09:12 with the price list rules, version 3. Nine refused rows fixed in place by the rule "comma as decimal", three that no rule can fix, what changed, and Put the fixed rows through. Product design with made-up data.

Fixed in place

Grace fixes refused rows on the load itself, puts them through, or downloads them as an exceptions file. One tick adds "comma as decimal" to the rules for the next load.

Rowan stopped until 14:00

Rowan's tender emails quote prices, so Grace stopped it at 09:24 for a data problem. Its queue waits and nothing is sent. It restarts itself at 14:00, as Grace.

Drop folders and saved rules

Files dropped in Northcott's folders are found within a minute and loaded by saved rules. A new kind of file gets draft rules for a person to approve.

Back to your CRM

Data moves both ways by file: loads come in, and every hour files go back to your CRM with new prospects, contacts, conversations, cases, stops and opt-outs, and meetings booked.

The Client operator Desk and the stop switch: **The desks** · **Quality and the learning loop**

Eight situations, and who does what.

The worker does the routine part and asks when a decision is not its to make. Your people decide, each up to their own limit. You set what a worker does alone, asks first, or never does, for each kind of commitment.

Situation	What the worker does	What your person decides
A customer asks for a price below the quantity break	Checks your price formula. Morgan may agree 232.00 on 40 HA-220 alone. Lower goes to Sam with the facts, a due time and a backup, and the customer is told when to expect an answer.	Sam approves, offers another price, declines, or escalates what is past his own limit.
A discount above the rep's limit	Harbor Maintenance asks 12% off. Morgan asks Sam, whose limit is 8%. Sam escalates to Priya with a note, keeping the due time.	Priya approves up to 15%, or sends it back to Sam with what to offer.
A customer needs it sooner than the lead time	The lead time check gives the earliest date it can meet. The worker says that date, or asks for an earlier one to be agreed.	The person your date rule names agrees the earlier date, or not.
An enquiry arrives after hours	Jordan answers every rep's line in after-hours mode: list prices only, no concessions, order requests taken, nothing promised before Monday.	Nothing until morning. An urgent matter, such as a line down, goes to the person on call.
A customer quotes a competitor's price	Maria cites about 228.00, and Laura names the Hydra-Tek HT-22. Each is recorded on the account, internal. The worker offers only what the price check returns.	Sam decides case by case, or gives the worker more room for a period, with a limit and an expiry.
A customer would rather deal with a person	The preference is saved. The worker pauses and hands the conversation to the rep, and starts none with them again.	Sam replies himself, or gives it to the account owner.
A customer asks not to be contacted	Records it in their own words, for the scope they asked for. A STOP to a worker's number covers that number. Promises already made go to their owner.	Nothing to decide: no setting switches it off.
A technical question comes in	Answers from the library, citing the document and page. If nothing answers it, the worker asks the person you name, and stays the owner of the case.	Your named person answers. A gap can become a document for the library.

WHO MAY AGREE WHAT AT NORTHCOTT

232.00
Morgan may agree alone, for 40 HA-220. Below that, it asks Sam.

225.00 or 8%
Sam, the rep, may agree on his accounts. Below that, he escalates to Priya.

15%
Priya, the sales manager, may approve. Past it, she escalates in turn.

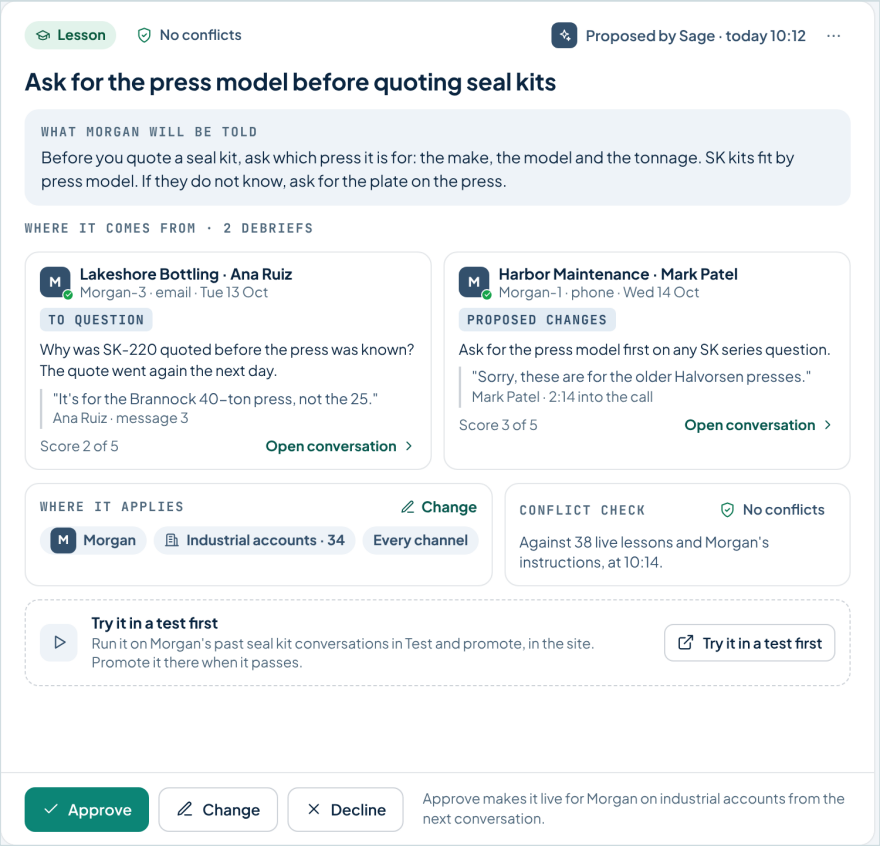
Three rules no setting changes

The worker says it is an AI. It honours a request not to be contacted. It never offers a commitment that a pricing formula or rule did not return. A customer cannot talk the worker into an exception, because the worker is not the one deciding.

Limits are settings. Each person can have their own approval limit for a kind of commitment, set by an administrator, never their own. Past it, deciding is refused and the ask is escalated. Nobody can grant more than they hold, and a worker cannot change its own limits.

It gets better, and you can measure it.

Every conversation is scored when it ends, on all three sides, and debriefed. Lessons come from what happened, and nothing reaches a worker until a person approves it. Results are counted once, in your own numbers.



A lesson on the Client operator Desk: what Morgan will be told, the two debriefs it came from, where it applies, and a conflict check run before anyone decides. Product design with made-up data.

From two debriefs to one lesson

Two seal kit quotes went again because the press was not known. Sage proposed "Ask for the press model before quoting seal kits". Grace approves it, and it is live for Morgan on industrial accounts from the next conversation.

Review and coaching

Grace's Review sorts conversations by how far the mood fell. Priya coaches from the ones that were nudged, joined, taken over or ended worse. Reps are never scored.

Reported or Confirmed

A result is Reported when a worker says so, and Confirmed when your own systems show it. Training and simulation are never counted.

WHERE A RETURN COULD COME FROM

Where	Your baseline, before	What the pilot records
Quotes followed up on the day promised	Open quotes, and how many were followed up on the day.	Promises kept, and quotes accepted, Confirmed by your systems.
Enquiries outside your hours	Enquiries after hours, and how long they waited.	After-hours conversations, and order requests taken.
Dormant accounts	Accounts with no recent order, and how many your team contacted.	Dormant accounts reactivated, Confirmed by an order.
Your team's time	Hours spent on follow-up, chasing and record updates.	The time a person would have spent, at your rate.

The pilot measures the return in your own numbers. Take the baseline from your own systems before the pilot, then measure the same way while it runs.

Scores, debriefs, review, lessons, tests and the live watch: **Quality and the learning loop**

Start with a pilot on your own desk.

Choose one part of the desk: a set of accounts, a territory, a segment or a kind of work. Take a baseline from your own systems, run the worker beside your team, then compare.

Your team

Sets the objectives for each account. Names who decides prices, terms, dates and technical answers, with their limits and backups. Sets tone, hours, modes and contact rules. Approves lessons.

The Corvair engineer or partner

Fits the industrial sales pack to your business. Loads your products, prices, terms, team and customers. Builds your pricing and lead time formulas and the links to your systems.

Together

Choose the accounts and the results that count. Test the worker in simulation before it goes live. Review the first conversations and decide what to widen.

What you bring

- Products, price book, terms and quantity breaks
- Your pricing, discount and lead-time rules, and plant lead times
- Your CRM, ordering and quoting systems, or files from them
- Who decides what, with limits and backups
- Your hours, holidays and on-call rota
- Datasheets, catalogues, manuals and safety data sheets
- Baseline numbers from your own systems

Start small

One process, such as quote follow-up for a set of accounts, with one named worker in assisted mode and one rep who owns it. Add accounts, after-hours cover or wider limits when the results show they are ready. Each step is your decision.

Ready to sell

Setup provisions your domains and channels with what your country requires. Each worker gets its own address and number. Nothing goes live until each part is ready.

NEXT STEP

Scope a pilot

Tell us which accounts and which results matter to you, and we will scope a pilot for your desk.

corvair.ai/cvw
Scan or visit

READ MORE: 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.