

THE CASE FOR A PILOT

Every account looked after. Every promise kept.

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 people make the decisions that are theirs to make, from a live desk that shows what waits for them and what every worker is doing.

What it does for you

Every account has an owner.

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

Prices checked, not guessed.

Every price, discount, date or term is checked against your own rules first. Exceptions go to your named person, with a due time.

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.

Cover after hours.

After hours a worker answers on its own line, alone and under tighter limits. Urgent matters go to the person on call.

Promises kept.

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

Better every week.

Every conversation is scored on all three sides, with its findings. 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 your named person. No setting turns off three rules: the worker says it is an AI when asked (its default greeting also says it), 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 phone call and a price decision. Then how to run, measure and start a pilot of your own.

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 virtual workers share the accounts. Sage coordinates them and Tess runs the data.

THREE PEOPLE ON THE DESK

Sam Ortega, sales manager

Morgan's supervisor and owner of the Brightline account. Decides price exceptions. Northcott's administrator.

Dana Whitfield, account manager

Sam's backup. A decision for Sam goes to Dana at once while he is away.

Priya Natarajan, inside sales

Northcott's client operator. Works with Tess on files, rules, reviews and lessons.

PART OF EVERY DEPLOYMENT

Sage, the coordinator

Always on. Watches every worker, queue and service. Balances work between workers, coaches a worker privately mid-conversation, chases promises and requests, and writes the daily brief.

PART OF EVERY DEPLOYMENT

Tess, the data steward

Always on. Loads every file through one popup, keeps the load rules, and writes files back to your CRM every hour.

Morgan

Key accounts, including Brightline. Its own line and address:
(614) 555-0142
morgan@northcott.corvaire.live

Riley

Dormant accounts. Reactivation by email to 214 past customers. Its own line, (614) 555-0177.

Avery

Public sector and new leads. Writes the expo follow-up campaign.

Jordan

After hours. Answers on its own line from 5:00 pm, in automated mode.

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.

WHAT EACH SIDE WANTS ON THE BRIGHTLINE ACCOUNT

Brightline Conveyor Systems of Grand Rapids, Michigan, has been a customer 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

Order against quote Q-2291 (40 x HA-220)

Quote sent 2 Oct

● In progress

Move Brightline to rev C seal kits

Set 1 Sep

● Not started

ACCOUNT TEAM

Sam Ortega

Only supplier through 2027

Owner: Sam, to Dec 2027

● On track

Learn the 2027 line budget

Owner: Sam

● Open

Meet the VP of operations

Owner: Sam

● 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

● Supported

Thursday 15 October, 10:36.

Two people from Brightline reach Northcott within six minutes: one by chat, one by phone.

- 10:36 ● **Chat** Morgan-1 is in a website chat with Maria Delgado. A distributor quoted her about 228.00 for 40 HA-220. "I'd rather keep this with you, but I need to be close."
- 10:38 ● **Checks price** The price for 40 is 235.00, as on quote Q-2291, valid to 29 October. Morgan may go to 232.00 on its own. 228.00 needs Sam, so Morgan does not offer it.
- 10:38 ● **Asks Sam** Request REQ-1042 to Sam: answer by 2:00 pm, backup Dana Whitfield. Morgan tells Maria: "228.00 needs Sam's approval, and he will answer by 2:00 pm today."
- 10:42 ● **Ringing** Laura Chen, VP Operations at Brightline, calls Sam's Desk line. The ring card brings up her account: not met yet, and she holds the budget for two new lines in 2027. Sam answers.
- 10:42 ● **On the call** Laura wants one supplier for all three lines and asks about framework pricing for about 160 actuators each. Apex quoted Maria 228 for the Hydra-Tek HT-22. Sage writes the notes.

INCOMING CALL · YOUR LINE
11s



Laura Chen
VP Operations
Brightline Conveyor Systems
(616) 555-0187

- Not met yet. She holds the budget for two new lines in 2027.
- Morgan-1 is in a chat with Maria Delgado, her buyer, right now.
- Maria's 228.00 price decision waits on you, due 2:00 pm.

Answer
Let Morgan take it

If you do not answer in 20 seconds, Morgan answers and you get the summary.

The ring card: who is calling, three facts from her account, and Answer or Let Morgan take it. Product design with made-up data.

Brought forward

A card for each thing mentioned, matched to records CVW holds, not guessed. The HT-22 matches the HA-220, prices seen 226 to 236, lead time 5 to 6 weeks. Where we win: seal life, 3-week delivery, service from Columbus.

Also on the call

The decision waiting on Sam, with Approve in place. The objective "Learn the 2027 line budget", now known: two lines, about 160 actuators each, budget approved in January. Laura's last order, NFP-8741.



Laura Chen
VP Operations · Brightline Conveyor Systems · (616) 555-0187

On call
0:31
Mute

Hold
Transfer
Library
End call

Live transcript

Products, orders, quotes, competitors and people are picked out as they are said.

Connected on your line · the recording notice was given

Laura Hi Sam, it's Laura Chen at Brightline. Maria tells me she has been chatting with your assistant about the HA-220s.

You Hi Laura, good to hear from you. Yes, Morgan is with Maria now. How can I help?

Laura We are adding two lines in 2027, and I want one supplier for all three. What would framework pricing look like?

You We can do that. How many actuators will the two lines need?

Laura About 160 each, and the budget is approved in January. Our last order, NFP-8741, went in smoothly.

Laura One thing. Apex quoted Maria 228 for the Hydra-Tek HT-22. Can you get close on her 40 units?

S **Notes · Sage writes them as you talk**

- Laura wants one supplier for all three lines
- 2027: two new lines, about 160 actuators each, budget approved in January

Brought forward

From what Laura and you have said.

COMPETITOR SAID AT 10:42

Hydra-Tek, sold through Apex Industrial Supply

HT-22 matches HA-220	HT-18 matches HA-185
Prices seen 226 to 236	Lead time 5 to 6 weeks

Where we win: seal life, 3-week delivery, service from Columbus.

Open the competitor

DECISION · WAITS ON YOU SAID AT 10:42

228.00 for Maria's 40 HA-220

Quote 235.00	Asked 228.00
Your limit 225.00	Answer by 2:00 pm

Approve 228.00
Offer 230.00

OBJECTIVE SAID AT 10:42

Learn the 2027 line budget

Now known: two lines, about 160 actuators each, budget approved in January.

ORDER SAID AT 10:42

Order NFP-8741 · Brightline

The call on Sam's live desk: the live transcript marks the products, orders, competitors and people mentioned, Brought forward shows a card for each, and Sage writes the notes. Product design with made-up data.

The decision comes to Sam.

228.00 is not Morgan's to agree, so Morgan asks the person whose call it is. The request cannot stall. It carries the facts, a due time and a named backup, and silence is never taken as a yes.

WHAT REQUEST REQ-1042 HOLDS

PRICE DECISION 40 x HA-220 at 228.00 Brightline, asked by Morgan in a website chat.	FACTS ATTACHED 235.00 quoted, 232.00 limit A distributor quoted Maria about 228.00. Q-2291 is valid to 29 October.	ANSWER BY 2:00 pm today Maria has been told 2:00 pm. Sage chases Sam before it is late.	BACKUP Dana Whitfield While Sam is away, the request goes to Dana at once.	SAM MAY Approve or offer Approve 228.00, or offer something else. Sam's own limit is 225.00.
---	--	---	--	--

Now
Waiting 4 My channels Follow-ups
PRICE DECISION · REQ-1042
Answer by 2:00 pm
Maria Delgado asks 228.00 each for 40 HA-220
Brightline Conveyor Systems · asked by Morgan in a chat
Approve 228.00 Offer something else
TAKE OVER · REQ-1044
Answer by 3:30 pm
Luis Ortiz wants a person about a late delivery
Harbor Maintenance Services · asked by Riley by email
Take the conversation
Leave it with Riley

Team now
Your team's live work and who is free to help

M Morgan (614) 555-0142
1 of 3 in use

R Riley (614) 555-0177
3 of 3 writing emails

DW Dana Whitfield
Account manager
In a meeting at Lakeshore until 11:30 am

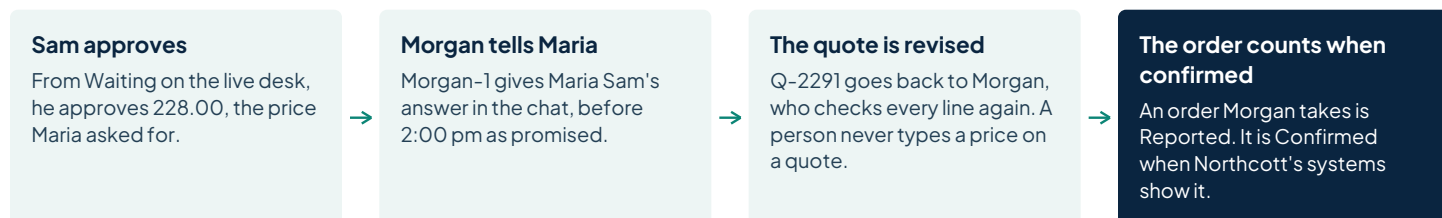
PN Priya Natarajan
Inside sales
Available

Brightline Conveyor Systems
Maria Delgado · Morgan-1 · Website chat · 6:22
Waiting on your decision
Maria We have a distributor quote at about 228.00. I'd rather keep this with you, but I need to be close.
Morgan Thank you for telling me. 228.00 needs Sam's approval, and he will answer by 2:00 pm today.
Watch Nudge Join Account

Open
Records open here, beside your work
RESULTS · TODAY
5 results
Counted since midnight on your team's accounts. Each opens here.
Quote requested · 40 HA-220
Brightline Conveyor Systems · Morgan Reported 10:31
Meeting booked · seal review
Harlan Packaging Machinery · Riley Confirmed 09:58
Quote requested · HA-340 retrofit
Lakeshore Bottling Co. · Morgan Reported 09:28
Order placed · NFP-8841
Lakeshore Bottling Co. · Dana Whitfield Confirmed 08:47
Quote requested · seal kits
Harbor Maintenance Services · Riley Reported 07:12
Reported means a worker said so. Confirmed means your systems show it.

Sam's live desk. Now: Waiting holds Maria's price decision, with Approve 228.00, and a take-over for Luis Ortiz. Team now: the workers, Dana and Priya, and the Brightline chat waiting on Sam. Open: today's results. Product design with made-up data.

Sam can answer wherever he is: from Waiting on the live desk, from the decision card brought forward on a call, by email, in Slack, or by telling Sage "approve Maria's price at 228". His status says where decisions go: Available, Busy or Away. Sam approves 228.00 from Waiting on the live desk.



Sage keeps the whole desk on track.

Every deployment includes Sage, the coordinator, and Tess, the data steward. Both are always on: they have no switch and no working hours, and only the stop switch stops them. Each morning Sage writes a daily brief, and keeps it up to date through the day.


Daily brief from Sage

Always on · updated 10:42 am

1

Maria Delgado expects your price answer by 2:00 pm. Your backup is Dana Whitfield.

Open the chat

2

Riley has 214 dormant accounts to contact. At today's pace that takes 4 days. Moving 31 public-sector accounts to Avery saves a day.

Move the 31

See the board

3

One promise was missed: Priya Natarajan's call to Tom Okafor about order NFP-8790. It is now with you.

Plan the call

✦ Chat with Sage

Ctrl K

Sage's daily brief, updated at 10:42 am: three items, each with an action, and Chat with Sage. Product design with made-up data.

What the brief holds

- What needs Sam and by when: Maria expects his price answer by 2:00 pm.
- What is slipping: Riley has 214 dormant accounts to contact, 4 days at today's pace. Moving 31 public-sector accounts to Avery saves a day.
- A missed promise, now with Sam: Priya's call to Tom Okafor about order NFP-8790.
- Also each morning: news on your accounts, what Sage changed in profiles, and Tess's data summary.
- Each item has its action, such as Move the 31 or Plan the call. Sam can also ask Sage in chat.

Tess, beside Sage

Tess loads every file your team or your systems send, sends refused rows back in an exceptions file, and writes files back to your CRM every hour. Sage can direct her. Priya, the client operator, works with her. Like Sage, she never talks to customers.

On her own

- Watches every worker, queue and service, around the clock.
- Balances work: starts and stops clones within each worker's limit, such as Morgan-3 for a new chat.
- Coaches a worker privately when a conversation goes off track.
- Chases promises and requests, and escalates what she cannot settle.

When you ask

She does what you can do in CVW, within the delegation you set.

- For each group of actions, such as deciding requests or managing work, you choose: she may do it when asked, confirm with you first, or never.
- Everything she does for you is recorded as done by Sage for you.

Never

- Talks to customers. The workers do.
- Presses the stop switch. A person does.
- Changes prices, formulas or permissions on her own initiative.
- Makes her own lessons live. A person approves them.

Morgan by day. Jordan after hours.

Each worker has an on and off switch, with a mode beside it: assisted or automated. The calendar changes the mode at the times you set, and a person can change it at any time. Morgan covers Northcott's key accounts by day. Jordan answers on its own line from 5:00 pm, in automated mode.

M

Morgan
Automated · 3 at once · 2 waiting

Working

Morgan-1 · chat

Maria Delgado, Brightline · 6 min

Morgan-2 · email

Drafting a reply to Harlan Packaging

Morgan-3

Free

R

Riley
Assisted · 2 at once · 6 waiting

Stopped until 14:00

Riley-1

Stopped

Riley-2

Stopped

Workers on the Operations live desk: Morgan in automated mode with three clones, and Riley in assisted mode, stopped until 14:00. Product design with made-up data.

Two modes, and off

Assisted: people first, and a person can watch, join or take over. Automated: the worker works alone under tighter limits, and urgent matters go to the person on call. Off: no new work. A person can switch a worker off for a time.

Who answers a call

Each number has a rule: ring a person first and the worker after a wait (20 seconds by default), the worker answers, or ring a person only. Out of hours the worker answers or takes a message. When a worker is full, the least busy worker answers, or it takes a message.

Promises that hold

Before a worker promises a person's time, it checks that person's calendar and status: Available, Busy or Away. That is how Maria was told 2:00 pm. On voicemail the worker takes a message and a good time to call back, and gives the person a request with it.

In each buyer's language

Northcott also sells in Mexico and Quebec. The worker follows the buyer's language, even if they switch in the middle of a conversation. Greetings and each country's AI disclosure come in that language. Sam and Dana read every turn translated into English, with Show original for the customer's own words.

Outbound work, inside your contact rules.

Riley writes reactivation emails to 214 past customers, Northcott's dormant accounts, from riley@northcott.corvair.live. Every message passes the contact rules at the moment it is sent, not when it was queued.

Duplicates One message per person, whatever lists they are on.	Contact rules Checked again at the moment each message goes.
☐ Same email address -22 Always removed	☐ Asked not to be contacted -9 Always applied, in the scope they asked for
☒ Same person, different emails -8 Matched on name and company	☐ No basis for contact -9 Nobody is contacted without one
☐ One person per company 0 Keeps the main contact, for account-based outreach	☐ No approved country profile -3 Workers only contact countries with one
See examples	☒ Contacted in the last 14 days -16 By anyone, including your own email and the CRM
	☒ In another running campaign -9 One message a week across all campaigns
	☒ Prefers a person -3 Goes to the account owner instead

Riley's dormant accounts

- The list of accounts dormant 90 days or more keeps itself current.
- Riley opens each email with the customer's last order and its date, and says what has changed since.
- The plan ends on a reply, an order or a stop.
- Accounts with their own worker, such as Morgan's, stay with it.

Duplicates and contact rules in the campaign studio, with how many people each removes from the expo campaign. The rules are checked again as each message goes. Product design with made-up data.

CHECKED AT THE MOMENT OF CONTACT

- Asked not to be contacted: always applied, in the scope they asked for.
- A recorded basis for contact for this purpose, such as an enquiry or a past order.
- The contact's local hours and the country's permitted hours.
- One message a week to one person, across all campaigns. A promise to a customer comes first.
- Contacted in the last 14 days by anyone, including your own email and the CRM.
- Do-not-call registries where the country requires them. After a no to a call, no second call.

A check that cannot run counts as no. Corvair keeps a reviewed profile for each country, and a worker cannot contact anyone in a country with no approved profile. Every chat, call and text opens with the AI disclosure the country requires.

Stop means stop

A stop covers the context it was given in: this call, this action, this account or this worker. Wider or narrower words are applied as said. A STOP texted to Riley's number stops texts from that number, unless the country requires a wider stop. No setting switches it off. Promises already made go to their owner.

Keystone Food prefers a person

In an email thread with Riley, Keystone Food's buyer wrote "I'd rather deal with a person than an assistant." Riley paused the thread for Sam. The preference is saved, and her contacts now go to the account owner.

A campaign, and a customer with a contract.

Northcott follows up the Great Lakes Fluid Power Expo as one campaign, planned in the campaign studio in four steps. Sam owns it. Where a customer has a supply agreement, the price check applies its terms without a person.

EXPO FOLLOW-UP · SEAL KITS

1 Audience

429 people ready: the GLFPE 2026 expo leads and the Hydraulics 101 webinar sign-ups, leaving out accounts dormant 90 days or more.



2 Message and offer

Three points to make, materials from the library, and the expo price on HA-series seal kits until 30 November.



3 Who and when

Avery writes, up to 2 clones. One message a week to one person, across all campaigns.



4 Review and start

Sam checks the counts and the first email as a customer sees it, then starts the campaign.

Purpose
Sets the playbook the workers follow.

Follow up an event
Reactivate
Invite
Notify
Prospect

Points to make

- Thank them for visiting the Northcott stand at the Great Lakes Fluid
- The 2026 seal kit range ships the same day from Columbus
- Offer a 15-minute call to check their HA-series seals before winter

Offer

☒ Expo price on HA-series seal kits, until 30 November
A dated rule. Workers quote it only while it runs.

Materials Add from the library

Seal kit catalogue 2026 x
HA-185 datasheet x

Email template

Event follow-up
Short note
Catalogue

First email, as a customer sees it
The worker writes each one for the person, from these points.

From **avery@northcott.corvaire.live**
To **Dan Price, Prairie Agri Systems**
Subject **Following up from the Great Lakes Fluid Power Expo**

Hi Dan,

I'm Avery, an AI assistant for Sam Ortega at Northcott Fluid Power. Thank you for visiting our stand at the Great Lakes Fluid Power Expo.

Our 2026 seal kit range ships the same day from Columbus. Until 30 November, expo visitors get the expo price on HA-series seal kits.

Would a 15-minute call to check your HA-series seals before winter be useful? I can book it with Sam.

Best regards, Avery, Northcott Fluid Power

Seal kit catalogue 2026
HA-185 datasheet

Back
Next: who and when

Message and offer: the purpose, three points, the dated expo offer, materials and the email template, with the first email as a customer sees it, from avery@northcott.corvaire.live. Product design with made-up data.

A CUSTOMER WITH A CONTRACT

Most customers have no contract, and the price book applies to them. Where a customer has a supply agreement, the price check recognises it and applies its terms. Brightline has no contract price for the HA-220, so its 40 follow the Standard price list.

The check asks first

Is a contract in force? If so, its terms apply to what it covers, and the rest follows the price book. An incentive, such as the expo price, applies under a contract only if you say so.

The quote says so

Formal quotes come from your own template, numbered, with the validity and the terms that must be on a quote. A quote under a contract carries its reference.

Near the end date

A contract near its end date becomes work for the account owner. A sent quote gets follow-up on the day promised.

One memory for each account.

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

On a call with you · 0:31

LC

Laura Chen
VP Operations · (616) 555-0187
Brightline Conveyor Systems

Not met yet

Holds the 2027 budget

Call

Text

Email

To Morgan

Account

ACCOUNT TEAM NOW

SO

You
On a call with Laura Chen

M

Morgan-T
Waiting on your decision · Maria Delgado · 7:07

Watch

SO

Sam Ortega · you
Account owner

DW

Dana Whitfield
Backup · in a meeting until 11:30 am

OPEN

REQ-1042

Price decision
228.00 for 40 HA-220 · due 2:00 pm

Approve 228.00

Q-2291

Quote
40 x HA-220 at 235.00 · valid to 29 Oct

OBJECTIVES

Only supplier through 2027

60%

Learn the 2027 line budget

85%

Meet the VP of operations

50%

RECENT

10:40

Maria said two more lines are planned for 2027

10:38

Morgan asked you for a price decision

2 Oct

Morgan sent quote Q-2291

The customer column on Laura Chen's call: who she is, the account team now, what is open, the objectives and recent events. Product design with made-up data.

The customer in front of you

When Laura Chen called, her account came up beside the call: who she is, the account team now, what is open with Approve in place, the objectives and recent events. After the call, two objectives moved: learn the 2027 line budget is now 85%, and meet the VP of operations is now 50%. Only supplier through 2027 stands at 60%.

Price book

Open in site

Q HA-220

HA-220 cylinder · Product

248.00 each for 1 to 9 · 235.00 for 10 to 49 · 226.00 for 50 and over.
Lead time 10 working days.

Price check for Brightline, 40

235.00 each, 9,400.00 in all, from the Standard price list. Brightline has no contract price.

Ask Morgan to quote

Email the price

Dana cannot agree prices, so the lowest price is not shown.

The Price book drawer, with a price check for Brightline. Product design with made-up data.

Every line has a source

The account's website is read into its profile, each line with its page as the source. The latest annual report of a key account is kept in its library and read in too. LinkedIn and other business profiles are kept as links, not read.

A price check, in a drawer

- The HA-220 is 248.00 each for 1 to 9, 235.00 for 10 to 49 and 226.00 for 50 and over, with a lead time of 10 working days.
- For Brightline's 40: 235.00 each, 9,400.00 in all, from the Standard price list. Brightline has no contract price.
- The lowest price that may be agreed shows only to people who may agree a price. Dana cannot, so it is hidden from her.
- Ask Morgan to quote, or email the price.

News becomes work

News is watched for every account: daily for key accounts, weekly for others. A relevant item tells the account owner and can plan the preparation. Research on a person covers their business role only, and a person confirms each finding.

Your data comes in through Tess.

Tess, the data steward, is part of every deployment beside Sage. She loads every file your team or your systems send, and checks every row before anything is written. Priya Natarajan works with her as Northcott's client operator.

LOAD

Open in site

Price list October.csv

Loaded	Today 09:12, by Tess
Rules	Price list, version 3
Rows	1,204 read · 1,192 changed · 12 refused

Why rows were refused

Unit price is not a number
9 rows, such as "235,00"

Product not in the catalogue
3 rows: HA-9X0

What changed

HA-220, 10 to 49
241.00 to 235.00 each

HA-340, 10 to 99
418.00 to 412.00 each

And 1,190 more
See the load in the site

Fix the 12 rows

Download refused rows

Undo load

A load opened: Price list October.csv, loaded by Tess at 09:12 with the price list rules, version 3, why 12 rows were refused and what changed. Product design with made-up data.

Tess · files today

Loads in site

12 refused

Price list October.csv

Loaded 09:12 · 1,204 rows

Open

Loading

orders-2026-10-16.csv

3,410 of 5,500 rows

Waiting

dealer-contacts.csv

Rules waiting for you

Review rules

Tess's files today: the price list with 12 rows refused, an orders file loading, and dealer contacts waiting for rules. Product design with made-up data.

One popup for any file

- Reads the character set, the separator and the header, and finds rows to skip and totals at the end.
- Profiles each column: how full it is, its formats and its problems.
- Matches the columns to the file type's fields, and offers clean-up: capitals, spaces, emails, phone numbers in international form, dates and countries.
- Checks every row before anything is written.

Northcott's October price list. At 09:12 Tess read 1,204 rows and changed 1,192 prices, among them the HA-220 for 10 to 49, from 241.00 to 235.00. She refused 12 rows: 9 with a unit price that is not a number, such as "235,00", and 3 for a product not in the catalogue.

Saved rules

Rules are saved with the column matching and versioned. One can be the standard for a kind of file, so the next file of that kind loads the same way.

Refused rows

They go to an exceptions file in the same format and header as the original, with a column saying why. A company in a contacts file that is not an account yet is added as a prospect.

Drop folders

Files dropped into Northcott's folder are found within a minute. Tess loads a file that fits saved rules, if allowed, and drafts rules for a new kind of file for a person to approve.

Back to your CRM

Every hour: new prospects, contacts added or changed, conversations, cases, stops and opt-outs, and meetings booked. Until a live connection is set up, data moves both ways by file.

A person decides. Tess never makes new rules live and never lets a held load go on. Every kind of record loads and has a page: quotes, orders, invoices, cases, installed equipment, service contracts, stock and lead times, so a worker can say where a case stands, as of the last load. Each morning her data summary goes into Sage's brief, and anyone can ask her "What came in today?"

Eight situations, and who does what.

The worker does the routine part and asks when a decision is not its to make. Your people make those decisions. The line sits where you set the limits: 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: allowed, needs approval or refused. At Brightline, Morgan may agree down to 232.00 on 40 HA-220. Anything 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 the price, offers another, or declines.
A customer asks for different payment terms	Lakeshore Ag Equipment asks for Net 45 instead of Net 30. The terms need approval, so Morgan holds the 38,400.00 order and asks Sam. Sage chases the decision.	Sam approves Net 45 or declines.
An enquiry arrives after hours	Jordan answers on its own line in automated mode, under tighter limits you set, for example list prices and quantity breaks only, no concessions, order requests taken. A hand-off waits for the morning, with a callback time Jordan can keep.	Nothing until morning. An urgent matter, such as a line-down breakdown, goes to the person on call.
A customer quotes a competitor's price	Maria cites a distributor quote of about 228.00, and Laura Chen later names the Hydra-Tek HT-22. Each is recorded on the account with its source. 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	Keystone Food: Riley pauses the thread and flags it for review. The buyer's preference is saved, and her contacts now go to the account owner.	Sam replies himself or passes it to the account owner.
A reorder check-in is due	Keller Packaging Machinery: the account's worker checks in on schedule, takes an order request for 8 x SK-220, promised for Thursday, and keeps the promise on its own list.	Nothing, unless the order request is above the worker's limit. The order is Confirmed when your systems show it.
A customer asks not to be contacted	Records it in their own words. A stop covers the context it was given in: this call, this action, this account or this worker. A STOP texted to a worker's number covers that number. Promises already made to that person go to their owner.	Nothing to decide: no setting switches it off. The owner handles any open promise.
A technical question comes in	Searches the library, narrowest collection first, and answers citing the document and page. If nothing answers it, the worker asks the person you name for technical answers, with the facts, a due time and a backup, and stays the owner of the case.	Your named person answers. A gap that reviews find can become a library upload.

Three rules no setting changes

The worker says it is an AI when asked. Its default greeting also says it. 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.

Limits are settings. For each kind of commitment you choose what a worker does alone, asks first, or never does. Automated mode has tighter limits. A person can grant a worker more authority for a period, with a limit and an expiry. Nobody can grant more than they hold, and a worker cannot change its own limits.

It gets better, and you can see why.

Every conversation is scored when it ends, on all three sides. Findings show what went well and what went wrong, line by line. A coach suggests fixes, and nothing reaches a worker until a person approves it.

Scored on all three sides

The Brightline chat is scored for Northcott (the order against the quote), for the account team (only supplier through 2027), for Maria (a price close to the distributor quote) and for service. Each question of the rubric is answered 1 to 5, with a reason.

Findings, with their lines

Three to eight findings for each conversation, each a strength, an issue or a risk, with the lines that show it. The outcome records whether the next step is confirmed or tentative, an upgrade the customer left open, and any stop or no.

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 Corvaire. The person ticks the ones they agree with. Lessons and instruction changes wait for approval, shown against the current version.

Tested before it goes live

A new release is tested against the one in use, case by case, and a case worse on the customer's side holds it back. Simulation covers outbound too: CVW plays the contact, an assistant, a voicemail or the wrong person. Simulated conversations are never counted in results.

Watched after it goes live

The first 30 scored live conversations of a new release are compared with the release before. If it does worse, the engineer and the client operator are told, with Roll back. Nothing is rolled back without a person.

A lesson waiting for approval

"Ask for the press model before quoting seal kits." Sage proposed it from two debriefs and found no conflicts. Priya, the client operator, approves it or changes it.

Needs you

5 items

12 rows refused

Price list October.csv

Loaded by Tess at 09:12. 1,192 prices changed; 12 rows were refused.

Fix rows

Open load

Rules to approve

dealer-contacts.csv

A new kind of file. Tess drafted load rules: 9 columns matched, 2 left out.

Review rules

Ask Tess

To review

5 conversations scored 2 or lower

Since 08:00. Three ask about lead times for the HA series.

Review

Lesson to approve

"Ask for the press model before quoting seal kits"

Proposed by Sage from two debriefs. No conflicts found.

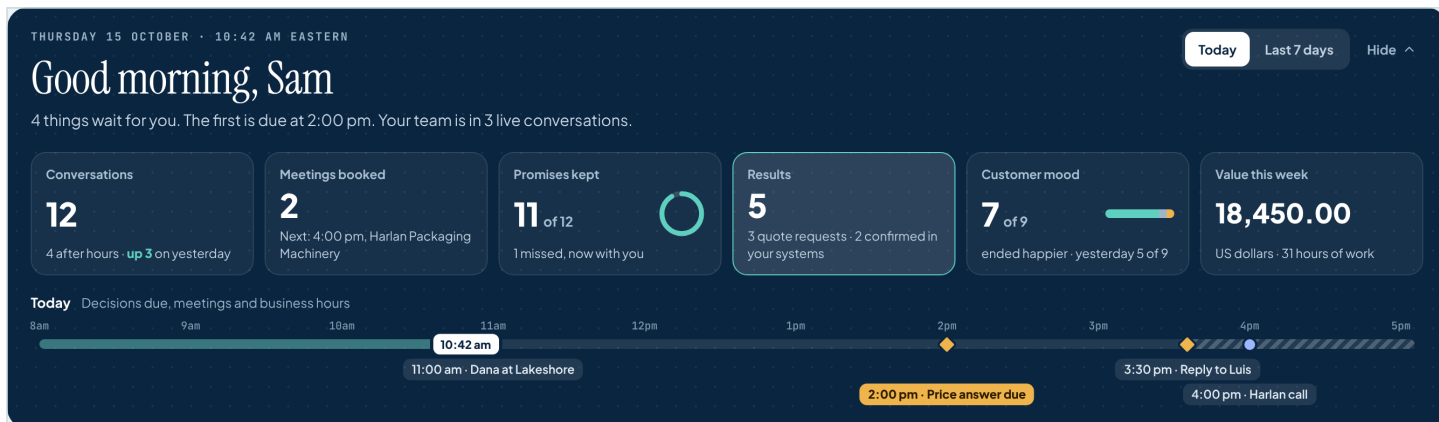
Approve

Change

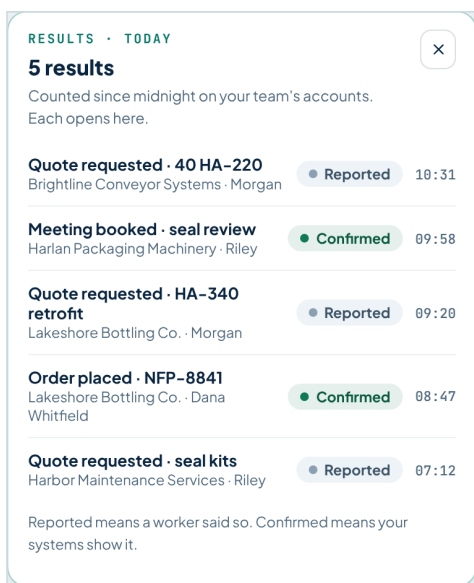
Needs you on the Operations live desk: refused rows, load rules to approve, conversations to review, and a lesson waiting for approval. Product design with made-up data.

Measure it in your own numbers.

The live desk opens on the Today band: the team's wins for today or the last 7 days. Each figure opens the list behind it. Only live conversations count. Training is never counted.



The Today band on Sam's live desk: what waits for him, six win tiles for today, and the day line with decisions due, meetings and business hours. Product design with made-up data.



Today's 5 results, each Reported or Confirmed. Product design with made-up data.

Reported or Confirmed. Each result is recorded once, with its evidence. Reported means a worker said so. Confirmed means your own systems show it, as with order NFP-8841. Value comes in two parts: a rule for each kind of result, set with you, and the time a person would have spent, at a rate you set. This week: 31 hours of work.

WHERE A RETURN COULD COME FROM

Where	Your baseline, before	What the pilot records
Quotes followed up on the day promised	Open quotes followed up on the promised day, from your CRM.	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.

This brochure states no return figure. Take the baseline from your own systems before the pilot, then measure the same way while it runs.

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.

WHO DOES WHAT

Your team

Sets the objectives for each account. Names who decides prices, terms and technical answers, and their backups. Sets tone, rules, hours, modes and contact rules. Decides requests and approves lessons.

The Corvair engineer or partner

Customises the industrial sales pack for your business. Loads your products, prices, terms, team and customers. Builds your pricing formulas and the connections to your CRM, ordering and quoting systems.

Together

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

● Ready	Website chat On at northcott.com, with Morgan and Riley	Website chat ↗
● Ready	Email morgan@ and riley@northcott.corvair.live	Email ↗
● Waiting	Phone numbers 2 numbers. One for each worker	Phone ↗
● Waiting	Text messages Your SMS brand is registered from your company profile. Texts start once carriers approve	SMS ↗
● Needs you	People and who decides 9 people. Dana Whitfield has no backup next week	People ↗
● Ready	Schedule Holiday on Friday 23 October. Automated after 17:00	Schedule ↗
● Needs you	Behaviour Version 6 in use. Draft "Shorter replies" is ready to publish	Behaviour ↗
● Ready	Products and prices Price list loaded today at 09:12	Prices ↗
● Ready	Contact rules US rules in force. Opt-outs checked on every send	Contact rules ↗

Setup live, Ready to sell: each channel and setup area with its state, such as Ready, Waiting or Needs you. Product design with made-up data.

Ready to sell

Setup provisions your domains and channels: email and website chat, and calls and texts with what your country requires, such as sender registration for texts in the US. Each worker gets its own address and number. Nothing goes live until each line is ready.

What you bring

- Products, price book, terms and quantity breaks
- Your pricing, discount and lead-time rules
- Access to your CRM, ordering and quoting systems, or files
- Who decides what, with backups
- Your hours, holidays and on-call rota
- Datasheets, catalogues and policies for the library
- 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 owner on your desk. Add accounts, after-hours cover or wider limits when the results show they are ready. Each step is your decision.

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

