



THE AI AGENT SQUAD

AI agents that work every deal for you

They update your opportunities, analyse every deal and prepare your next move. Natively inside Salesforce.

everready.ai

FIELD AUTOFILL

Stage

Negotiation

Amount

\$24,000

MEDDPIC[®] EXECUTION

81% completeness



FOLLOW-UP EMAIL

Ready to send

Send

 Native in Salesforce

HOW IT WORKS

Built inside Salesforce

The agents live on your Opportunity and Account pages. They read what your team already captures and write straight back to your records.



No new tool

Runs in Lightning, on the records reps already use.



Reps stay in control

Every proposed update is validated before it is written.



Always explained

Each value comes with the source that justifies it.

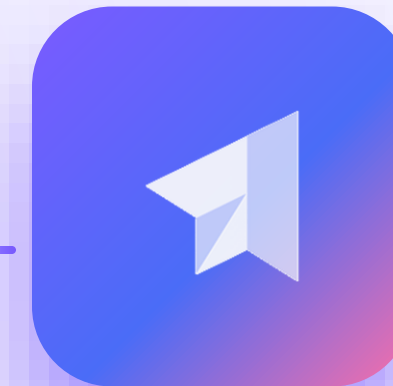
READS

 **Emails**

 **Meetings**

 **Calls**

 **Account data**



9 agents



Writes to
**Opportunity &
Account**

- **Fields**
- **Contact roles**
- **Activities**
- **MEDDPICC®**
- **New contacts**
- **Account overview**

FROM CLEAN DATA TO THE NEXT MOVE

Nine agents, three families

01



Opportunity Autofill

Keep opportunities up to date

Field Autofill

Contact Roles

Activity Relink

02



Deal Analysis

Qualify and understand every deal

MEDDPICC[®] Execution

Deal Summary

Deal Timeline

03



Next Move

Prepare, follow up, expand

Meeting Prep

Follow-Up Email

Contact Finder

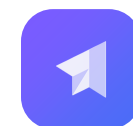
Field Autofill agent

Keeps Salesforce fields up to date automatically, from the conversations reps already have.

BUSINESS VALUE

A CRM your forecast can trust, with **zero manual entry**.

- ✓ Standard and custom fields
- ✓ Every value comes with its reason
- ✓ Validate one by one, or all at once



Proposed update
Field Autofill



ACME Corp

Number of users

Empty → **200**

The opportunity name states 200 users, the number of Salesforce seats.

CRM type

Empty → **Salesforce**

Confirmed by the opportunity name and the account record.

Email platform

Empty → **Gmail**

The account record shows the messaging field set to Gmail.

Validate all

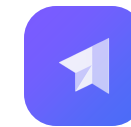
Contact Roles Agent

Attaches contacts to the right opportunity with the correct role, no manual tagging.

BUSINESS VALUE

See the **whole buying committee**, on every deal.

- ✓ Detects contacts missing from the deal
- ✓ Suggests the MEDDPICC role
- ✓ Backs each role with the email that proves it



Contacts to link Contact Roles



ACME Corp

MC

Michael Carter

Head of Sales · email of 03/20

Decision Maker

SM

Sarah Mitchell

VP Revenue Operations · email of 03/19

Executive Sponsor

RH

Robert Hayes

Procurement Director · email of 03/20

Economic Buyer

EP

Emily Parker

Data Marketing Manager · CRM workshops

Business User

Validate all

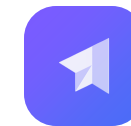
Activity Relink Agent

Finds past activities and reattaches them to the opportunity they belong to.

BUSINESS VALUE

The **complete deal history**, nothing lost on the account.

- ✓ Recovers past emails, calls and tasks
- ✓ Relinks each one to the right opportunity
- ✓ A complete view of all activity on the deal



10 activities to relink
Activity Relink



ACME Corp

8

Emails

1

Call

1

Task

Re: EverReady x ACME Corp

78%

Apr 07 · Alex Martin · on account ACME Corp



Picking up our talk

75%

Mar 09 · Alex Martin · on account ACME Corp



6 likely · 4 uncertain

[Link to opportunity](#)

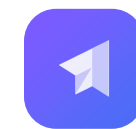
Deal Qualification Agent

Fills and updates MEDDPICC®, BANT, SPICED or your own methodology from every interaction, flags qualification gaps.

BUSINESS VALUE

Your methodology **applied on every deal**, every day.

- ✓ Score and completeness per letter
- ✓ Proposed answers with their evidence
- ✓ Validate, edit or reject each one



Qualification
MEDDPICC®

81% score

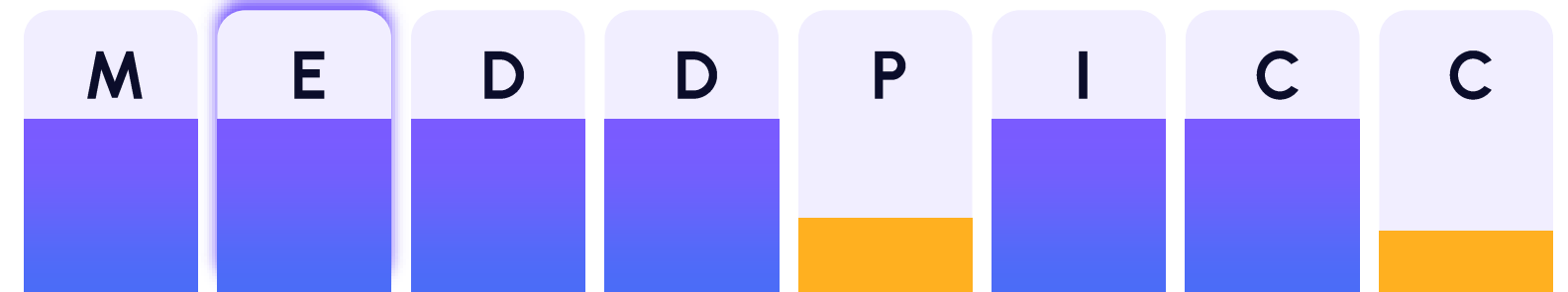
MEDDPICC®

BANT

SPICED

MEDDIC

Your own



● 2 gaps flagged: Paper Process, Competition

ECONOMIC BUYER · 95%

Who is the economic buyer?

James Walker

Approved the September release timeline. Source: Opportunity Contact Role.

Deal Summary Agent

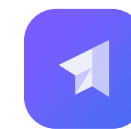
Turns any opportunity into a clear, readable summary in seconds.

BUSINESS VALUE

Any deal understood in one paragraph

.

- ✓ Amount, probability and close date in context
- ✓ Who is who in the buying committee
- ✓ Blockers flagged before they cost the deal



Generated today
Deal Summary



ACME Corp

€24k

Amount

40%

Probability

6 days

To close

ACME Corp is a €24k deal. The last substantive interaction was **30 days ago**. The **buying committee is well mapped**, with James Walker as Decision Maker and Eva Galtier as key champion. Discovery is complete, but **ROI analysis is still open** and an overdue quote is likely blocking progress.

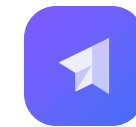
Deal Timeline Agent

Visually reconstructs the full history of exchanges and engagement.

BUSINESS VALUE

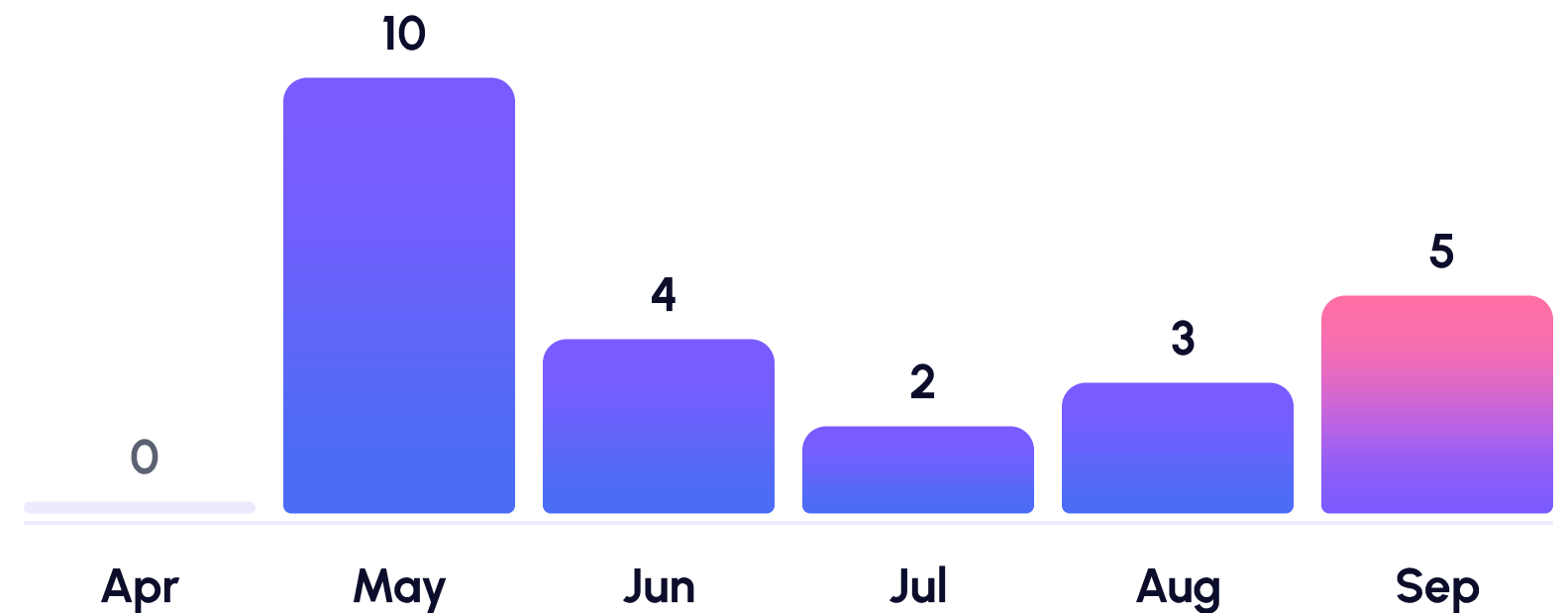
Spot **momentum** and **stalls** at a glance.

- ✓ Emails, calls and meetings over time
- ✓ Benchmarked against your won deals
- ✓ Key events and an AI summary of the period



Last 6 months
Deal Timeline

96% engagement



May

Trial kickoff and scope

Sep

Additional licences discussed

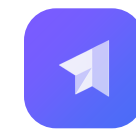
Meeting Prep Agent

Preps reps ahead of every call with the key points and questions.

BUSINESS VALUE

Every call **moves the deal forward.**

- ✓ Relationship status in one paragraph
- ✓ Goals tied to your MEDDPICC gaps
- ✓ Questions to ask, addressed to the right person



POC in 5 days
Meeting Prep



ACME Corp

WHERE THE RELATIONSHIP STANDS

The Decision Maker was last engaged seven months ago. ROI, champion and decision process are still unknown.

TO GET OUT OF THIS MEETING

- Identify Pain
- Metrics
- Economic Buyer

BUSINESS IMPACT

to James Walker

"What is the one operational or financial problem you most want to solve over the next six months?"

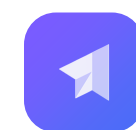
Follow-Up Email Agent

Drafts the follow-up email with agreed next steps, ready to send.

BUSINESS VALUE

Next steps in the inbox while the call is still fresh.

- ✓ Written from the real deal history
- ✓ Addressed to the right contact
- ✓ Edit, copy and send in seconds



Draft ready
Follow-Up Email



ACME Corp

TO james.walker@acme.com

SUBJECT **EverReady rollout at ACME Corp, next steps**

Hi James,

Following up on the order form sign-off you confirmed in June, I wanted to check how the rollout is progressing at ACME Corp.

Could we book 30 minutes next week?

Best, Alex

Edit

Send

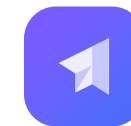
Contact Finder Agent

Surfaces new prospects with verified professional contact details.

BUSINESS VALUE

Every approval gate **covered before close**.

- ✓ Spots the gaps in the buying committee
- ✓ Suggests people with a match score
- ✓ Import to Salesforce in one click



Contacts to add
Contact Finder



ACME Corp



Missing: finance and IT security stakeholders, critical to budget approval.

NS

Nora Serrano

Senior FP&A Analyst

72%



nora.serrano@acme.com



+1 (415) 555-0142

Import to CRM

AR

Adam Reyes

IT Security Manager

68%



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+1 (646) 555-0187

Import to CRM

AGENT CONSOLE

Your agents, your rules

Every agent works on day one. Then your admins set everything.

Permissions and scope

Who sees each agent, who edits it

Prompts and templates

Library, fork, or write your own

Credit consumption

Per agent, per team, per month

Triggers and guardrails

When it runs, what it may write

AI AGENT SQUAD

Active

Field Autofill

Contact Roles

Activity Relink

Sales methodology

Deal Summary

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Meeting Prep

Follow-Up Email

Contact Finder

Credits this month

18,400 / 25,000

Credits, models and limits

AGENT	AI MODEL	USED THIS MONTH	LIMIT
Field Autofill	Claude	4,200 credits	5,000
Contact Roles	GPT	1,900 credits	3,000
Activity Relink	Mistral	1,200 credits	2,000
Sales methodology	Claude	5,600 credits · 93% of limit	6,000
Deal Summary	Gemini	2,300 credits	4,000
Follow-Up Email	Customer LLM	3,200 credits	5,000

CREDITS THIS MONTH

18,400 / 25,000

Sales EMEA 62%

Sales US 38%

● Alert at 90% · hard stop per agent

BRING YOUR OWN AGENTS

Run Salesforce or external agents from the same console.

● Agentforce

● Claude

● OpenAI

● Mistral

● Gemini

● Your own LLM



Put the agents to work on your pipeline

Thirty minutes with our team. We configure one agent on your Salesforce data, and you keep the output.

Book my walkthrough →

everready.ai contact@everready.ai