

THE AI-NATIVE REVENUE OPERATING SYSTEM

# 16 AI agents. Built inside Salesforce.

Deployed around your data. Your CRM has the data. Your team doesn't have the instructions. These agents read your CRM in real time and tell your team exactly what to do next.

**16**production-ready  
agents**4**

revenue disciplines

**5**step operating  
framework**RDRI**data-readiness  
sequencer

## INTRODUCTION

# Your CRM has the data. Your team doesn't have the instructions.

Revenue teams don't lose deals because they lack tools. They lose them because critical signals — stalled stages, disengaged stakeholders, misaligned forecasts — go unread until it's too late. Most agent deployments fail not because of the technology, but because the underlying CRM data isn't reliable enough to act on. That's why we built the RDRI.

## HOW THE SYSTEM WORKS · FROM RAW CRM SIGNAL TO MEASURABLE IMPACT

### 1 · SIGNAL

Continuously monitors designated CRM fields, activity logs, and engagement data.

### 2 · INTELLIGENCE

Identifies patterns: risks, velocity anomalies, qualification gaps, forecast deviations.

### 3 · RECOMMENDATION

Proposes a specific, timestamped next best action — not a generic alert.

### 4 · ACTION

Your team executes, or the agent automates the response directly in Salesforce.

### 5 · IMPACT

Every output is tied to a revenue KPI: win rate, forecast accuracy, cycle time, churn.

## Before you deploy: know your data readiness

Every agent depends on CRM data quality to produce reliable outputs. We measure this through the **Revenue Data Reliability Index (RDRI)** — a score across five dimensions: completeness, accuracy, timeliness, consistency, and traceability.

Each agent card includes a minimum RDRI threshold. Below it, the agent still runs — but its recommendations are directional, not actionable. Use the RDRI as your **deployment sequencer**: start with the agents your data already supports, and build toward the ones that require higher maturity.

## RDRI SCORE GUIDE

- **< 40 — Foundational only**  
Build the data foundation first.
- **40–65 — Operational accessible**  
Execution & pipeline agents unlock.
- **> 65 — Advanced fully reliable**  
Forecast & strategic agents trustworthy.

## THE MAP

# 16 agents. 4 revenue disciplines.

Organized around the four moments where revenue is most at risk — or most recoverable. Start where your data is ready. Build toward where it needs to be.

## Deal Intelligence

RDRI 62 • ADVANCED

*When deals stall before your team notices*

Tracks opportunity health, stakeholder engagement, qualification gaps, and objection signals — so your team intervenes before a deal slips.

Deal Health

Qualification

Objection Intelligence

CRM Enrichment

**KPI:** Win rate · Commit accuracy · **Recovers up to 1 in 4 at-risk deals.**

## Pipeline & Forecast Intelligence

RDRI 50 • OPERATIONAL

*When your forecast lies to you*

Audits pipeline coverage, flags assumption gaps in your forecast, and models scenario risk — so your number means something before the QBR.

Pipeline Integrity

Coverage Intelligence

Forecast Scenario

Revenue Risk

**KPI:** Forecast accuracy · Coverage · **Variance drops 18 pts with weekly audits.**

## Productivity Automation

RDRI 35 • FOUNDATIONAL

*When your team is busy, but not selling*

Eliminates admin drag — call summaries, follow-ups, meeting prep, activity capture — so CRM quality improves without friction. Start here if your RDRI is below 50.

Post-Call Intelligence

Follow-Up Generation

Meeting Intelligence

Activity Capture

**KPI:** Data quality · Selling time · **4.7h/week admin → under 30 min.**

## Strategic Revenue Intelligence

RDRI 70 • ADVANCED

*When you're optimizing the wrong things*

Mines historical deal data to sharpen ICP, expansion triggers, win/loss patterns, and churn early-warning — so go-to-market decisions are built on evidence.

Win/Loss Intelligence

ICP Intelligence

Expansion Opportunity

Churn Prevention

**KPI:** Net revenue retention · **+30% ICP conversion in two quarters.**



# Deal Health Agent

Identify at-risk opportunities before they distort your forecast or exit your pipeline silently.

FOR  
Sales Managers · AEs  
· RevOps

## TRIGGERS — ACTIVATES WHEN

- Pipeline review scheduled (weekly)
- Opportunity inactive for 14+ days
- Stage duration exceeds benchmark
- Stakeholder engagement score drops
- Deal moves to Commit without full qualification

## REQUIRED SIGNALS — CRM DATA READ

- Opportunity record (stage, amount, close date)
- Stage history & velocity
- Email engagement logs
- Meeting activity & recency
- Call summaries

## AGENT INSTRUCTIONS — THE AGENT DETERMINES

- Whether stage progression matches expected velocity
- Whether engagement is rising or declining over 14 days
- Whether risk signals outweigh positive buying signals
- Whether all critical stakeholders are engaged recently
- Whether activity matches the forecast category

## EXPECTED OUTPUT · DEAL HEALTH

Health Score **68%**

### Risk factors

No executive stakeholder identified  
No customer interaction in 12 days  
31 days in stage (benchmark: 18)

### Positive signals

Champion actively engaged (2 meetings)  
Budget confirmed in Stage 3

### Recommended actions

1. Schedule executive alignment meeting within 5 days
2. Validate decision process & confirm stakeholders
3. Confirm implementation timeline to reduce risk

## EXPECTED OUTCOMES

- Improved forecast accuracy at commit
- Earlier intervention on at-risk deals
- Fewer slipped deals in final quarter
- Higher pipeline visibility for RevOps

## RDRI REQUIREMENT

**62** /100 min

- Timeliness: activity logged within 48h
- Completeness: stakeholders & history >80%
- Traceability: call summaries linked to opp

→ Use Productivity agents first to raise data quality.

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## Qualification Agent

Score every opportunity against your qualification framework before it contaminates your forecast.

### TRIGGERS — ACTIVATES WHEN

- New opportunity moves past Stage 1
- Deal advanced without full qualification
- Deal added to Commit or Best Case
- Qualification score drops below threshold
- Manager requests a qualification audit

### REQUIRED SIGNALS — CRM DATA READ

- Opportunity record (stage, amount, close date)
- Contact roles and titles
- MEDDIC / MEDDPICC field completion
- Recent activity logs
- Opportunity field-change history

### AGENT INSTRUCTIONS — THE AGENT DETERMINES

- Whether all qualification criteria are documented
- Whether the Economic Buyer is identified
- Whether the forecast category is justified
- Whether the Champion shows recent engagement
- Whether the close date fits remaining gaps

### EXPECTED OUTPUT · QUALIFICATION

Qualification Score **54%**

#### Qualification gaps

Economic Buyer not identified (critical)  
Decision process undocumented  
No compelling event recorded

#### Strengths

Pain clearly identified  
Champion engaged — 3 touchpoints  
Budget range confirmed verbally

#### Recommended actions

1. Map Economic Buyer before next stage
2. Document decision process in next call
3. Downgrade Commit → Best Case until resolved

### EXPECTED OUTCOMES

- Cleaner pipeline, fewer unqualified deals
- Earlier deals flagged for coaching
- Consistent qualification standards
- Fewer end-of-quarter surprises

### RDRI REQUIREMENT

**50** /100 min

- Completeness: qualification fields >70%
  - Consistency: criteria standardized
  - Timeliness: contact activity within 72h
- Use Activity Capture & CRM Enrichment first.

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# Objection Intelligence Agent

FOR  
Sales Managers · AEs ·  
Enablement

Surface recurring objection patterns across your pipeline and give your team the right response before the next call.

**TRIGGERS — ACTIVATES WHEN**

- Call summary contains objection keywords
- Stage stalls 10+ days after interaction
- Opportunity marked Closed Lost
- Win/loss note updated on closed opp
- Manager requests objection analysis

**REQUIRED SIGNALS — CRM DATA READ**

- Call summaries linked to opportunities
- Email content & reply sentiment
- Stage history and stall patterns
- Closed Lost reasons (field + notes)
- Competitor fields on opportunity

**AGENT INSTRUCTIONS — THE AGENT DETERMINES**

- Whether a specific objection type was raised
- Whether it matches known lost-deal patterns
- Whether escalation or a new approach is warranted
- Whether it was addressed in a later interaction
- Whether the rep has the right response content

**EXPECTED OUTPUT · COMPETITOR DISPLACEMENT**

**Objection signals**

“Already working with [Competitor]” (Oct 14)

No differentiation documented

Preceded loss in 4 of last 6 deals

**Context**

Stage 3, 22 days no progression

No executive stakeholder engaged

**Recommended actions**

- Share competitive battlecard before next call
- Request executive intro to reframe value
- Document objection response after next call

Pattern **Detected**

**EXPECTED OUTCOMES**

- Faster, consistent objection resolution
- Reduced stall from unaddressed objections
- Improved win rate in contested segments
- Better enablement feedback loop

**RDRI REQUIREMENT**

**48** /100 min

- Traceability: call summaries linked to opp
- Completeness: Closed Lost reasons >75%
- Timeliness: summaries within 24h

→ Use Post-Call Intelligence Agent first.



# CRM Enrichment Agent

Keep your CRM records complete and current without asking your reps to do it manually.

FOR  
RevOps · Sales Managers  
· Admins

## TRIGGERS — ACTIVATES WHEN

- Account/contact created with gaps
- Opp reaches Stage 2+ with missing fields
- Contact role blank after 5 days
- Account not updated in 90 days
- Weekly data-quality audit

## REQUIRED SIGNALS — CRM DATA READ

- Account & contact field completeness
- Opportunity contact roles
- External enrichment sources (LinkedIn, providers)
- Last-modified date on records
- Activity logs on accounts & contacts

## AGENT INSTRUCTIONS — THE AGENT DETERMINES

- Which required fields are missing or stale
- Whether firmographic data is current
- Which fields auto-populate vs. need rep input
- Whether title/department/seniority is consistent
- Whether minimum contact roles exist

## EXPECTED OUTPUT · WEEKLY AUDIT

Flagged **34+61+12**

### Top gaps

61% new contacts missing department  
28 opps with no Economic Buyer role  
14 accounts: headcount 180+ days stale

### Auto-enriched

41 contacts: title + LinkedIn updated  
19 accounts: firmographics refreshed

### Recommended actions

- 12 opps missing Decision Maker (list attached)
- 8 accounts: conflicting industry — review
- Re-run enrichment on flagged records

## EXPECTED OUTCOMES

- Higher RDRI across all five dimensions
- Less manual data entry for reps
- More reliable segmentation & reporting
- Improved performance of every other agent

## RDRI REQUIREMENT

**35** /100 min

- Completeness: works best at 50%+ populated
  - Consistency: picklists standardized in SF
  - Accuracy: depends on connected provider
- Recommended starting point below 50/100.

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## Pipeline Integrity Agent

Audit your pipeline for structural gaps before they distort your forecast and mislead leadership.

FOR  
RevOps · Sales Managers  
· CRO

### TRIGGERS — ACTIVATES WHEN

- Weekly pipeline review scheduled
- New deals added without a stage
- Coverage ratio drops below target
- Quarter-end within 6 weeks
- CRO requests pipeline health report

### REQUIRED SIGNALS — CRM DATA READ

- All open opps by stage, amount, close date
- Stage history & velocity by category
- Activity logs per opportunity
- Coverage ratio (current vs. target)
- Historical close rates by stage & segment

### AGENT INSTRUCTIONS — THE AGENT DETERMINES

- Whether coverage meets the ratio to hit quota
- Whether close dates pushed without progression
- Whether deal mix fits historical close patterns
- Whether late-stage deals have enough activity
- Whether any stage is abnormally stacked

### EXPECTED OUTPUT · PIPELINE INTEGRITY

Integrity Score **61%**

#### Structural issues

Stage 3 overloaded: 41% stuck >25 days  
8 deals pushed 3+ times — \$340K  
Coverage 2.7x vs 3.5x — \$280K gap

#### Healthy signals

Stage 4 conversion 71% (bench 65%)  
New pipeline this week: \$180K

#### Recommended actions

1. Qualify out or accelerate 8 chronic pushers
2. Flag top-of-funnel gap — sourcing sprint
3. Move 3 Stage 3 deals to Best Case

### EXPECTED OUTCOMES

- Reliable reviews, less manual prep
- Earlier coverage-gap identification
- Reduced forecast inflation from stale deals
- Better pipeline-to-capacity alignment

### RDRI REQUIREMENT

**52** /100 min

- Timeliness: stage/close updates within 48h
- Completeness: all opps have close/amount/stage
- Consistency: stage definitions standardized

→ [Run CRM Enrichment Agent first.](#)

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# Coverage Intelligence Agent

Know exactly how much pipeline you need and where the gaps are before your team runs out of quarter.

FOR  
RevOps · Sales Managers  
· CRO

## TRIGGERS — ACTIVATES WHEN

- Monthly/weekly coverage review
- Rep attainment tracking updated
- New rep added or territory changed
- Coverage drops below 3x for a segment
- QBR preparation initiated

## REQUIRED SIGNALS — CRM DATA READ

- Quota by rep, team, and segment
- Open pipeline by stage & close date
- Historical win rates by stage/segment/rep
- Avg deal size & cycle length by segment
- Closed Won/Lost current & prior periods

## AGENT INSTRUCTIONS — THE AGENT DETERMINES

- Whether each rep/team/segment has enough coverage
- Whether gaps concentrate in segments/territories
- What new pipeline volume closes the gap
- Which reps are most at risk of missing quota
- Whether new-vs-expansion mix fits quota

## EXPECTED OUTPUT · WEEK 38

Overall coverage **2.9x**

### By segment

Enterprise 3.8x   
Mid-Market 2.4x — \$190K gap  
SMB 1.9x — \$320K gap

### Reps at risk (<2.5x)

Rep A 1.8x — \$145K  
Rep B 2.1x — \$98K  
Rep C 2.3x — \$72K

### Recommended actions

- Prioritize outbound in Mid-Market & SMB
- Schedule 1:1 reviews with Rep A, B, C
- Reallocate 2 enterprise leads to rebalance

## EXPECTED OUTCOMES

- Proactive gap management, not end-of-quarter scramble
- Better attainment distribution across the team
- More accurate capacity planning
- Earlier CRO visibility on at-risk segments

## RDRI REQUIREMENT

**54**/100 min

- Completeness: quotas entered for all reps/segments
  - Accuracy: win rates from reliable Won/Lost
  - Timeliness: pipeline updated within 48h
- Ensure quotas & pipeline are current first.



# Forecast Scenario Agent

FOR  
RevOps · CRO · VP Sales

Model your forecast under multiple scenarios so leadership stops guessing and starts deciding.

## TRIGGERS — ACTIVATES WHEN

- Weekly forecast deadline approaching
- A Commit deal changes stage/amount/date
- CRO requests scenario modeling
- End-of-quarter within 4 weeks
- Board/investor reporting initiated

## REQUIRED SIGNALS — CRM DATA READ

- Forecast by category (Commit, Best Case, Pipeline)
- Stage-weighted opportunity values
- Historical close rates by stage/segment/quarter
- Deal-level risk signals
- Prior-quarter forecast vs. actual variance

## AGENT INSTRUCTIONS — THE AGENT DETERMINES

- Base case from Commit + historical close rates
- Upside if top Best Case deals close
- Downside if slippage matches prior quarter
- Whether the submitted forecast fits the base range
- Which deals would shift forecast outside variance

## EXPECTED OUTPUT · Q4 WEEK 8

Submitted **\$1.24M**

### Scenarios vs. quota

Downside \$980K (-21%)  
Base case \$1.18M (-5%)  
Upside \$1.41M (+14%)

### Top swing deals

Deal A \$180K — 11 days silent, HIGH  
Deal B \$145K — champion re-engaged  
Deal C \$98K — legal review, +2 wks

### Recommended actions

1. Reforecast Deal A to Best Case
2. Accelerate Deal B to Commit if timeline holds
3. Adjust submitted forecast to \$1.18M

## EXPECTED OUTCOMES

- Decisions based on scenario ranges
- Faster forecast-risk identification
- Reduced forecast variance
- More credible QBR conversations

## RDRI REQUIREMENT

**65** /100 min

- Accuracy: 2+ quarters of clean Won/Lost
  - Timeliness: forecast changes within 24h
  - Traceability: key deal risks captured
- Deploy Deal Health & Pipeline Integrity first.



# Revenue Risk Agent

Identify the deals and patterns most likely to derail your quarter before they do.

FOR  
RevOps · CRO · VP Sales

## TRIGGERS — ACTIVATES WHEN

- End-of-quarter within 6 weeks
- A Commit deal shows 2+ risk signals
- Total Commit drops >15% week over week
- Coverage falls below 2.5x
- CRO requests a revenue-risk summary

## REQUIRED SIGNALS — CRM DATA READ

- Commit & Best Case deals with full history
- Deal risk indicators: activity, engagement
- Historical slippage by rep/segment/size
- External signals: legal, procurement status
- Past close rates by forecast category

## AGENT INSTRUCTIONS — THE AGENT DETERMINES

- Which Commit deals carry 2+ simultaneous risks
- Which reps have late-stage slippage patterns
- Probability-weighted revenue at risk & mitigations
- Whether aggregate risk exceeds historical slippage
- Whether a segment shows systemic risk

## EXPECTED OUTPUT · Q4 WEEK 9

Commit at risk **\$387K**

### High-risk deals (3+ signals)

Deal A \$180K — 14d silent, single-threaded  
Deal B \$112K — champion & legal stalled  
Deal C \$95K — 28d flat, competitor back

### Rep-level adjustment

Rep X 38% slippage — 0.6x multiplier  
Rep Y consistent — full confidence

### Recommended actions

1. Exec sponsorship on Deal A & B within 5 days
2. Adjusted risk after actions: \$210K (17%)
3. Build \$180K contingency from Best Case

## EXPECTED OUTCOMES

- Fewer end-of-quarter surprises
- Proactive mitigation, not deal rescue
- More defensible forecast submissions
- Better coaching on individual slippage

## RDRI REQUIREMENT

**68** /100 min

- Accuracy: 3+ quarters of reliable Closed data
- Timeliness: risk signals within 24h
- Traceability: interactions linked to opp

→ Deploy after Deal Health, Pipeline & Forecast agents.



# Post-Call Intelligence Agent

Turn every sales call into structured CRM data automatically, within minutes of the conversation ending.

FOR  
AEs · Sales Managers  
· RevOps

## TRIGGERS — ACTIVATES WHEN

- Call ends and transcript is available
- Summary missing on an opp with a recent meeting
- Rep manually triggers post-call processing
- Manager requests a call summary

## REQUIRED SIGNALS — CRM DATA READ

- Call transcript or recording
- Opportunity linked to the meeting
- Contact & account context
- Previous summaries on the same opp
- Current stage & forecast category

## AGENT INSTRUCTIONS — THE AGENT DETERMINES

- Key topics, decisions, and agreed next steps
- Whether qualification advanced or was challenged
- Whether the opportunity record needs updating
- Whether new stakeholders/objections/signals surfaced
- Whether the next step is a logged SF task

## EXPECTED OUTPUT · ACME CORP · STAGE 3 DISCOVERY

Status **Logged**

### Key topics

Pain: 6+ hrs/wk manual forecasting  
Budget approved Q1, \$80–120K  
CFO sign-off required above \$100K

### Signals & risks

Asked for implementation timeline  
Requested manufacturing reference  
IT security review not yet initiated

### Recommended actions

1. Update Stage to 3 (confirmed)
2. Add CFO as Economic Buyer role
3. Log next step: reference + security doc

## EXPECTED OUTCOMES

- CRM updated within minutes, not days
- Consistent documentation across the team
- Managers review progress without asking reps
- Higher RDRI from systematic capture

## RDRI REQUIREMENT

**35** /100 min

- Traceability: requires conversation-intelligence tool
  - Completeness: opp linked to calendar
  - Consistency: meeting naming standardized
- **Deploy early to improve capture & adoption.**

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# Follow-Up Generation Agent

FOR  
Account Executives · SDR

Generate personalized, context-aware follow-up emails after every call, ready to send in under 60 seconds.

## TRIGGERS — ACTIVATES WHEN

- Post-call summary logged on an opp
- No follow-up sent within 2h of a meeting
- Rep requests a follow-up draft
- Next-step task created without an email

## REQUIRED SIGNALS — CRM DATA READ

- Post-call summary
- Contact name, title, and company
- Opp stage, context, identified pains
- Agreed next steps from the call
- Previous email history on the opp

## AGENT INSTRUCTIONS — THE AGENT DETERMINES

- Right tone & structure for the deal stage
- The primary call to action
- Whether to address one or many stakeholders
- Which call points to reference (active listening)
- Whether to attach supporting content

## EXPECTED OUTPUT · ACME CORP · POST-DISCOVERY

Draft **Ready**

### Email covers

Thanks + friction acknowledged  
Manufacturing reference intro  
Security questionnaire to send

### Close

Implementation roadmap for Q1  
CTA: Thursday 2pm, 30-min call

### Recommended actions

1. Log email send on the opportunity
2. Update next step: Confirm Thursday call
3. Attach reference case + security doc

## EXPECTED OUTCOMES

- Follow-ups within 1h, not 24–48h
- Consistent, professional comms
- Higher prospect response rates
- Reps reclaim 45–60 min/day

## RDRI REQUIREMENT

**38** /100 min

- Traceability: summaries linked to opp records
  - Completeness: name, title, email populated
  - Consistency: structured summaries improve quality
- [Deploy with the Post-Call Intelligence Agent.](#)

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# Meeting Intelligence Agent

Walk into every customer meeting with the right context, risks, and talking points pulled automatically from your CRM.

FOR  
Account Executives · Sales  
Managers

## TRIGGERS — ACTIVATES WHEN

- Meeting with a prospect within 24h
- Calendar event linked to an opportunity
- Rep requests a pre-meeting brief
- Manager joining a call requests a summary

## REQUIRED SIGNALS — CRM DATA READ

- Opportunity record (stage, amount, date)
- Contact profiles & recent engagement
- Previous call summaries & notes
- Open tasks and overdue next steps
- Account news or trigger events

## AGENT INSTRUCTIONS — THE AGENT DETERMINES

- Current deal status and what changed
- Unresolved items from the last interaction
- Likely risks or objections from history
- Who attends and their known priorities
- The primary objective for this meeting

## EXPECTED OUTPUT · ACME CORP · STAGE 3 · OCT 17

Brief **Ready**

### Who's in the room

Sarah Chen (VP RevOps) — Champion  
James Park (CFO) — Economic Buyer  
Marc Dupont (IT) — new, security focus

### Open items

Reference intro sent Oct 15  
Security questionnaire — send before  
Implementation timeline — prepare

### Recommended actions

1. Open with reference ROI anchor
2. Present roadmap, confirm Q1 feasibility
3. Ask CFO what a successful Q1 means

## EXPECTED OUTCOMES

- Reps arrive prepared every time
- Managers join any call unbriefed
- Stronger customer experience
- Prep time from 30–45 min to under 5

## RDRI REQUIREMENT

**40** /100 min

- Completeness: summaries & key contacts recorded
- Timeliness: opportunities updated within 48h
- Traceability: meetings linked to opps

→ [Pair with the Post-Call Intelligence Agent.](#)

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## Activity Capture Agent

Log every email, call, and meeting to the right Salesforce record automatically, without rep intervention.

FOR  
RevOps · AEs · Sales  
Managers

### TRIGGERS — ACTIVATES WHEN

- Email with a known contact not yet logged
- Calendar meeting completed without SF activity
- Call completed without an activity log
- Weekly audit finds activity gaps
- Rep account has no activity in 7+ days

### REQUIRED SIGNALS — CRM DATA READ

- Email metadata (sender, recipient, date)
- Calendar events with known contacts
- Call logs from telephony / CI tool
- Existing activity history
- Contact & account records for matching

### AGENT INSTRUCTIONS — THE AGENT DETERMINES

- Which emails/calls/meetings are unlogged
- Whether a new contact should be created
- The activity gap per rep and per account
- Which opp or account each activity belongs to
- Whether activity should trigger another agent

### EXPECTED OUTPUT · WEEK OF OCT 14

Coverage **78%**

#### Auto-logged

34 emails matched to opps  
12 meetings linked to accounts  
8 calls logged from telephony

#### Gaps identified

6 emailed contacts not in SF  
4 opps with zero activity 10+ days  
2 reps below 40% log rate

#### Recommended actions

1. Create 3 recommended new contacts
2. Flag 4 silent opps for Deal Health
3. Manual review of 2 low-log reps

### EXPECTED OUTCOMES

- Complete activity history on every record
- Higher RDRI on Timeliness & Traceability
- Full manager visibility into rep activity
- Richer input for every other agent

### RDRI REQUIREMENT

**30** /100 min

- Consistency: email domains standardized
  - Completeness: account & contact records exist
  - Traceability: at least one connected source
- Highest RDRI uplift. Deploy first below 50%.

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## Win/Loss Intelligence Agent

Understand why you win and lose systematically, from your own CRM data, not from rep memory.

FOR  
RevOps · VP Sales · Product  
Marketing

### TRIGGERS — ACTIVATES WHEN

- Opportunity marked Closed Won or Lost
- Quarterly win/loss review scheduled
- Win rate drops 5+ points vs. prior
- New competitor in 3+ losses in 30 days
- Product or pricing change deployed

### REQUIRED SIGNALS — CRM DATA READ

- Closed Won & Closed Lost records
- Lost reason fields and notes
- Competitor fields on opportunities
- Deal size, segment, industry, rep
- Cycle length & stage conversion data

### AGENT INSTRUCTIONS — THE AGENT DETERMINES

- Win rate by segment, size, industry, rep
- Whether competitors win in specific segments
- The profile of a won deal vs. a lost deal
- Whether losses cluster on price/fit/timing/competition
- Whether win rates shifted over two quarters

### EXPECTED OUTPUT · Q3 2026

Win rate **34%**

#### By segment

Enterprise 41%   
Mid-Market 31% (down 7 pts)  
SMB 24% 

#### Top loss reasons (MM)

Lost to competitor 38%  
No decision 29%  
Price 18% · Fit 15%

#### Recommended actions

- Deprioritize MM deals with no EB by Stage 2
- Build response for competitor in 12 losses
- Review MM pricing with leadership

### EXPECTED OUTCOMES

- ICP & qualification grounded in real data
- Competitive intelligence updates automatically
- Enablement priorities from real loss patterns
- Forecast accuracy improves with qualification

### RDRI REQUIREMENT

**65** /100 min

- Accuracy: lost reasons on 80% of losses
  - Completeness: competitors & attributes tracked
  - Consistency: stages & lost reasons standardized
- **Ensure strong Closed Lost data first.**

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## ICP Intelligence Agent

Stop selling to the wrong companies. Let your closed deal data define and continuously refine your real ICP.

FOR  
RevOps · VP Sales · CRO ·  
Marketing

### TRIGGERS — ACTIVATES WHEN

- Quarterly ICP review scheduled
- Win rate drops in a strong segment
- Sales & Marketing disagree on ICP
- New market or segment being evaluated
- Outbound targeting criteria updated

### REQUIRED SIGNALS — CRM DATA READ

- Closed Won records with full attributes
- Time-to-close & cycle length by profile
- Average contract value by segment
- Expansion & renewal data on customers
- Closed Lost for counter-ICP analysis

### AGENT INSTRUCTIONS — THE AGENT DETERMINES

- Which profiles have highest win rates & shortest cycles
- Whether marketed ICP matches won customers
- Top signals predicting a high-value deal
- Which profiles have highest ACV & expansion
- Which segments consume disproportionate resources

### EXPECTED OUTPUT · Q3 2026

ICP **Refined**

#### Data-derived ICP

Win: Manufacturing, Distribution  
ACV: Financial Services  
Size: 500–1,500 employees

#### Gaps identified

SMB 19% win, 3x longer cycle  
Tech vertical 22% vs 41% Manufacturing

#### Recommended actions

1. Realign outbound to Manufacturing 500–1,500
2. Weight SDR scoring to SF Enterprise + fit
3. Present ICP delta to Marketing for Q4

### EXPECTED OUTCOMES

- Focus on highest-potential accounts
- Higher win rates, shorter cycles
- Better MQL-to-customer conversion
- Sales & Marketing on a shared ICP

### RDRI REQUIREMENT

**68** /100 min

- Account data (industry, size, stack) populated
  - 3+ quarters of closed deal history
  - Industry & segment classifications standardized
- [Build a strong data foundation first.](#)

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## Expansion Opportunity Agent

Identify expansion-ready accounts before your competitors do, using signals already in your CRM.

FOR  
RevOps · Account Manager  
· CS

### TRIGGERS — ACTIVATES WHEN

- Account reaches 90 days post-deployment
- Usage exceeds expansion threshold
- Renewal date within 120 days
- Account adds headcount or a new office
- CSM requests an expansion analysis

### REQUIRED SIGNALS — CRM DATA READ

- Customer records (contract value, renewal)
- Product usage data
- Contact engagement history
- Growth signals (headcount, funding, offices)
- Prior upsell & cross-sell history

### AGENT INSTRUCTIONS — THE AGENT DETERMINES

- Whether the account shows expansion-ready signals
- Whether the renewal timeline creates urgency
- The recommended play and internal champion
- Whether untapped teams/geographies fit the value prop
- Whether growth trajectory suggests expanding needs

### EXPECTED OUTPUT · ACME GROUP

Expansion Score **78%**

#### Signals driving score

18 months deployed, strong adoption  
Champion promoted to SVP  
3 new offices in 6 months  
Renewal in 94 days — optimal window

#### Plays identified

Geographic expansion +€45K ARR  
Inside Sales team (80 reps) not onboarded  
Strategic tier upsell not activated

#### Recommended actions

1. Schedule EBR with SVP RevOps in 3 weeks
2. Prepare 18-month ROI summary
3. Tie expansion proposal to renewal

### EXPECTED OUTCOMES

- Expansion identified before renewals
- Increased net revenue retention
- Faster expansion via existing relationships
- CSM & AM aligned on growth

### RDRI REQUIREMENT

**63** /100 min

- Records include contract value & renewal date
- Engagement data updated within 48h
- Product usage linked to accounts

→ Ensure customer records are complete first.

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# Churn Prevention Agent

Detect at-risk customers early and intervene before disengagement becomes a lost renewal.

FOR  
RevOps · Customer  
Success · AM

## TRIGGERS — ACTIVATES WHEN

- Engagement below baseline for 21+ days
- Support ticket volume spikes
- Champion goes dark or leaves the account
- Renewal within 90 days + low health
- NPS drops significantly vs. prior

## REQUIRED SIGNALS — CRM DATA READ

- Customer account health score
- Contact engagement history
- Support ticket volume, severity, resolution
- Product usage data
- Champion & EB contact activity
- Prior renewal history & contract terms

## AGENT INSTRUCTIONS — THE AGENT DETERMINES

- Whether disengagement + friction predict churn
- Whether unresolved issues recur without resolution
- The recommended intervention and owner
- Whether the champion is active, moved, or silent
- How much time remains for intervention

## EXPECTED OUTPUT · ACME GROUP

Churn Risk **74%**

### Risk signals

Champion silent 28 days (was weekly)  
4 open tickets, 2 unresolved >14 days  
Last exec interaction 4 months ago  
Renewal in 67 days — window closing

### Stabilizing signals

€62K ARR — high retention priority  
Historical NPS 8/10  
3 active users still logging in

### Recommended actions

1. Exec outreach from EverReady within 5 days
2. Escalate 2 unresolved tickets to priority
3. Schedule business review before renewal

## EXPECTED OUTCOMES

- Early warning before renewals slip
- Higher gross & net retention
- Proactive saves instead of reactive rescue
- CS & AM aligned on at-risk accounts

## RDRI REQUIREMENT

**66** /100 min

- Health score & engagement data current
- Support data linked to accounts
- Timeliness: signals updated within 48h

→ Deploy after Expansion & Activity Capture agents.

## DEPLOYMENT SEQUENCER

# Start where your data is ready. Build toward where it needs to be.

### RDRI < 40 — Foundational

Deploy Activity Capture, CRM Enrichment, Post-Call & Follow-Up first. They build the data foundation every other agent depends on.

### RDRI 40–65 — Operational

Layer in Qualification, Objection Intelligence, Pipeline Integrity & Coverage. Execution and pipeline become reliable.

### RDRI > 65 — Advanced

Activate Deal Health, Forecast Scenario, Revenue Risk and the full Strategic tier — forecasts and GTM decisions you can defend.



Agents don't replace your process — they read your CRM in real time and tell your team the next best action. But an agent is only as reliable as the data beneath it. Measure your RDRI, fix the foundation, then deploy on data you can trust.

## See which agents your data can run today

We'll score your Salesforce RDRI and map your agent deployment sequence — foundation first, advanced last.

[Request a demo →](#)

everready.ai · AI Revenue Platform for Salesforce