



SALESDRIVER FIELD GUIDE #01

The Sales Stack Amnesia Audit

21 questions to find out whether your sales team actually remembers its buyers.

The point of this audit is not to count software. It is to find where buyer knowledge disappears, gets duplicated or has to be rebuilt by a rep.

Use this guide to:

- Score one real account instead of answering in theory.
- Find memory gaps before buying another tool.
- Identify where reps are acting as human middleware.

Built for operators, sales leaders and reps who want fewer disconnected tools and better buyer context.

New \$99 SalesDriver Platform: B2B data, CRM, email + LinkedIn outreach, email verification, company visitor identification, personalized landing pages at scale, AI, automation and 100+ mini tools.

How to score it

Use one important account. Score each statement 0, 1 or 2: 0 = no / rarely, 1 = partly / manually, 2 = yes / reliably. Do not give credit for a capability that exists but nobody uses.

Maximum score: 42. The lower the score, the more often your team is reconstructing the buyer from scratch.

#	Area	Question	0	1	2
1	Identity	We maintain one reliable company identity across CRM, data, outreach and website activity.	☐	☐	☐
2	Identity	We can reliably connect people to the right company even when data comes from different sources.	☐	☐	☐
3	History	A rep can see prior emails, calls, meetings and opportunities without searching multiple systems.	☐	☐	☐
4	History	A buyer changing jobs does not erase the useful history of the relationship.	☐	☐	☐
5	Buyer state	We know why a live opportunity is moving, stalled or going backward.	☐	☐	☐
6	Buyer state	We capture objections and timing issues in a form that can affect future actions.	☐	☐	☐
7	Signals	Website visits from target companies can be tied back to known accounts.	☐	☐	☐
8	Signals	Hiring, leadership changes, intent or other trigger events can change account priority.	☐	☐	☐
9	Relationships	We can see who in our company already knows or has engaged people at the account.	☐	☐	☐
10	Context	AI has access to our products, positioning, case studies and relevant account history before generating output.	☐	☐	☐
11	Context	The system knows which product or offer is most relevant to a specific account.	☐	☐	☐
12	Next action	A rep can answer “what should happen next?” without opening five tools.	☐	☐	☐
13	Next action	The reason for the next action is visible, not just the action itself.	☐	☐	☐
14	Personalization	Our personalization uses account history and buying context, not just public trivia.	☐	☐	☐
15	Personalization	Landing experiences can change for an account or segment instead of sending everyone to the same generic page.	☐	☐	☐
16	Execution	Email, LinkedIn, CRM and other workflows can act from shared context.	☐	☐	☐
17	Execution	Results from outreach feed back into the account record rather than ending inside the sending tool.	☐	☐	☐
18	Learning	A lost deal improves what we know about the account and similar buyers.	☐	☐	☐
19	Learning	We can identify patterns across wins, losses, objections, triggers and personas.	☐	☐	☐
20	Efficiency	Reps are not routinely copying and pasting information between applications.	☐	☐	☐
21	Efficiency	A new rep can understand an important account without reconstructing its history from scratch.	☐	☐	☐

Interpret the score

Score	What it usually means	Priority
34-42	Your stack retains context reasonably well. Focus on decision quality and automation.	Optimize
24-33	Useful systems exist, but reps still bridge important gaps manually.	Integrate
13-23	Buyer knowledge is fragmented. AI and automation are operating on partial context.	Rebuild memory
0-12	Your team repeatedly starts over. More activity will amplify the problem.	Fix architecture first

The three follow-up questions

- 1 Where did you score zero? Those are true memory failures.
- 2 Where did you score one? Those are usually human middleware jobs: searching, copying, reconciling or remembering.
- 3 Which three gaps most directly affect revenue? Fix those before polishing the rest of the stack.

Fast worksheet

Account tested	Biggest memory gap	Current workaround	Revenue consequence	First fix

The point

Your buyer remembers the last conversation. Your system should too. A sales stack becomes more valuable when every interaction changes what the company knows, not when it simply produces more activity.

SalesDriver connection: The CORA Intelligence Graph is our first step toward persistent company and buyer memory across entities, signals, campaigns, history and actions.