



SALES DRIVER FIELD GUIDE #07

The Sales Rep AI Operating Manual

How to use AI without turning the rep into a prompt operator or the buyer into generic output.

AI should remove low-value work, improve diagnosis and preserve context. It should not become a substitute for judgment, evidence or actual buyer understanding.

Use this guide to:

- Decide what AI should and should not do.
- Standardize pre-call and post-call workflows.
- Capture learning so the next rep starts smarter.

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.

The operating principle

Use AI to compress information and increase the quality of decisions. Do not use it to create false certainty. If the system does not know, it should say so.

Four jobs for AI

Job	Good use	Failure mode
Summarize	Compress call history, account changes, long notes	Losing nuance or treating summaries as the source of truth
Diagnose	Find gaps, contradictions, buyer-state weaknesses	Confident inference from thin evidence
Create	Draft messages, briefs, landing-page copy, follow-up	Generic output because the context is generic
Execute	Update CRM, trigger workflows, generate tasks	Automating the wrong decision faster

Before every important account action

- 1 Load the account identity and relevant people.
- 2 Pull prior CRM history, emails, calls, campaigns and objections.
- 3 Add current signals: website activity, job changes, intent or other trigger events.
- 4 State the business objective: what buyer movement are we trying to create?
- 5 Ask AI to separate facts, inference and missing information.
- 6 Only then generate the recommendation or message.

Daily rep workflow

Moment	AI job	Rep job
Start of day	Rank accounts by fit, state change and required follow-up	Choose where human attention creates leverage
Pre-call	Build concise brief, surface history and unanswered questions	Set call objective and hypothesis
During call	Optional transcription / structured note capture	Listen, diagnose, ask
Post-call	Extract commitments, objections, stakeholders and changes in buyer state	Correct the record and decide next action
Follow-up	Draft concise response using actual context	Edit for judgment, tone and commitment
End of day	Find records missing next action, owner or timing	Resolve the few that matter

Never let AI invent these

- Buyer intent
- Budget
- Authority
- Relationship strength
- Competitor status
- Internal politics
- Urgency
- A customer result you cannot prove

The memory rule

Every useful interaction should update persistent account context. Do not let information die inside a transcript, chat window or rep notebook. Capture at least: what changed, who matters, buyer state, objections, commitments, timing and next action.

AI quality checklist

Question	Pass?
Did the output distinguish fact from inference?	☐
Did it use account history rather than only public research?	☐
Did it identify missing information?	☐
Is the recommended action tied to a buyer-state problem?	☐
Would we be comfortable if the buyer knew what context we used?	☐
Did a human review any externally sent message or important action?	☐

Manager coaching pattern

Instead of “What is the next step?” ask the rep: What changed? What do we believe now? What evidence supports it? What are we trying to change in the buyer state next? AI can help prepare those answers, but the rep still owns the judgment.

SalesDriver lens

The reason we care about the CORA Intelligence Graph is simple: better prompts are useful, but persistent context is more important. The system should bring the relevant company, person, history and signal context to the task before the rep has to ask for it.