

USE CASE 01

Your reps are not short of material. They are short of one current answer.

Product changes, pricing exceptions and the last competitive objection live in someone's head, a deck from March, and a thread nobody re-reads. The rep improvises. Two reps improvise differently. Nothing fails loudly — the deal just gets slower and the CRM stops describing reality.

For a sales leader with more than one rep, a product that keeps changing, and a CRM that is already behind.

The problem	Reps work from different facts, follow-up slips, and CRM records fall behind.
The workflow change	Connect AI agents to verified knowledge, calls, and CRM while people keep the buyer relationship.
The working result	One current sales line, sourced answers, and quiet leads surfaced for action.

What the workflow becomes

The rep keeps the relationship and the commitment. What moves is where the facts come from and who is on the hook when they are wrong.

01 One sourced answer set

Approved product, pricing and competitive material becomes the one place answers are drawn from, with a named owner per area. Anything not in it is not an approved answer yet.

Carried by people

02 AI agents assemble, people commit

AI agents draft the reply, the follow-up and the CRM update from the call and the approved material, and cite what they used. The rep sends nothing they have not read.

Carried by AI agents

03 The gap becomes a request, not a guess

When the approved material does not answer the buyer, the AI agent does not invent a position. It raises the gap to the owner of that area, and the deal carries an open question instead of a plausible sentence.

People and AI agents together

04 Quiet accounts surface

AI agents watch the record for the follow-up that never went out and the account that went silent, and put them in front of the person who can act. The decision to act stays the rep's.

Carried by AI agents

Where the manual work goes

PROBLEM	WHAT A PERSON DOES TODAY	WHAT THE WORKFLOW CHANGE DOES
Two reps, two answers	Re-litigate the same objection in every deal review.	One approved answer set with a named owner per area.
The CRM is a week behind	Reconstruct the account from memory before the forecast call.	The update is drafted from the call and confirmed by the rep, not typed later.
A confident wrong answer	Discover it at procurement, after the commitment.	Answers cite their source; the unanswered question is raised, not filled in.
The follow-up nobody sent	Notice at quarter end.	The gap is surfaced to the rep while it is still a deal.

What you end up holding

One approved answer set with named owners, a sales workflow where AI agent contribution and human commitment are separate and visible, and a list of the questions the material still cannot answer.

WHAT THIS DOES NOT CLAIM

This describes a workflow design, not a shipped sales tool and not a measured revenue outcome. We have no customer result to show you for this case, and we will not present one until a bounded first case produces it against measures agreed in advance.

NEXT STEP

Bring us this workflow.

Twenty minutes, one recurring workflow, and an honest answer about whether a bounded first case is worth running.

[Book a 20-minute call](#) · di@8hats.ai

