THE EXECUTIVE REPORT

EXECUTIVE BRIEF.

The Sales Advisor platform, its AI workforce, and its operating model.

UNDERSTAND THE PLATFORM BEHIND THE PROMISE.

Explore the product capabilities, revenue workflows, providers, and complete plan details in the executive brief.

02 Contents
03 Our Story
04 Revenue Intelligence
05 AI Workforce
06 Voice & Conversation
07 Performance
08 Revenue Operations
09 Enterprise Trust
10 Bring Your Own AI
11 Pricing & Next Steps



Contents

03 **Our Story**
Why we walked away from the CRM playbook and built a human in the loop AI revenue platform.

04 **Command Center, CRM, and Pipeline**
Live deal health, Revenue DNA, dual Kanban pipelines, and analytics built from your own wins and losses.

05 **The AI Sales Force**
20 specialized AI agents that prospect, write, score, schedule, and follow up around the clock.

06 **AI Voice, Meetings, and Conversation Intelligence**
Outbound AI calling, an inbound receptionist, native video meetings, and every call transcribed and scored.

07 **Content, Teams, and Platform**
Proposals, battlecards, Social Studio, quotes and invoicing, plus team administration and billing.

08 **Executive Revenue Operating System**
Strategy, intent signals, e-signatures, webinars, post-sale delivery, and measurable platform value.

09 **Security and Compliance**
Enterprise-grade security, white-label branding, and your credentials under your control.

10 **Pricing and Next Steps**
Simple per-seat pricing from Free to Enterprise.

Our Story

Why Sales Advisor Exists

We Did Not Build Another CRM. We Built Its Replacement.

For decades, sales technology promised that more software would create more revenue. Instead, most teams inherited a disconnected stack and more administration. Reps became responsible for updating records, moving data between tools, and chasing reminders. Managers received reports about what had already happened while risk continued to build inside the pipeline.

Sales Advisor was built from a different premise: technology should carry the operational load so people can focus on judgment, relationships, and closing. Its AI workforce researches accounts, identifies priorities, prepares outreach, makes calls, schedules meetings, captures conversation intelligence, and keeps follow-up moving. Every action remains visible, reviewable, and connected to the customer record.

That operating model changes the role of the CRM. Instead of functioning as a passive archive that depends on perfect manual updates, it becomes the shared context for coordinated action. New signals can trigger research, outreach, coaching, or follow-up while the team retains control over approvals, customer relationships, and the decisions that require human judgment.

It also gives leaders a more useful view of performance. Activity, conversations, pipeline movement, and execution risk live in one connected system, making it easier to identify where momentum is building and where intervention is needed. Coaching can respond to real behavior, forecasts can reflect current evidence, and managers can act before a missed target becomes a quarter-end explanation.

The result is not another CRM layer. It is a unified revenue operating system for growing teams that want enterprise-level execution without enterprise complexity or cost. Signals become timely actions, conversations produce clear next steps, and leaders can see momentum and risk before the quarter is over—not after the outcome is already fixed.

How Sales Advisor Is Different		
01	**One Platform, Not Twelve Tools**	**CRM, outreach, calling, meetings, content, and coaching in a single system.**
02	**AI That Works, Not Just Suggests**	**Agents execute the outreach, the calls, and the follow-up themselves.**
03	**Enterprise Power, Honest Price**	**The capability of a large-cap stack without the large-cap contract.**

> **"A CRM tells you what happened last quarter. Your platform should be out there winning the next one."**

Revenue Intelligence

Forecasting, pipeline visibility, and account intelligence built for decisions before quarter end.

Know Your Number Before the Quarter Ends.

DASHBOARD

- Four drillable KPIs: total revenue, pipeline value, total leads, and active deals
- AI Daily Brief surfaces new and hot leads, closing-soon deals, calls, completed and overdue work, goal pacing, and weekly wins
- AI Plays ranks three strategy moves with priority, rationale, and expected outcome
- Action Stream opens records, calls or emails contacts, completes tasks, adds signals, and reorganizes action lanes with persistent daily completion state
- Revenue Pulse and Account Watchlist surface urgent work and at-risk accounts
- Live Activity Timeline searches and filters signals, outreach, calls, meetings, deals, documents, tasks, and AI actions
- Revenue Trend and Forecast charts support 3-, 6-, and 12-month views with expected revenue and confidence bounds
- Pipeline by Stage and Leads by Source charts open scoped record drill-downs
- Active Goals show status, period, current-versus-target progress, and pacing

CRM

- Searchable, filterable lead, customer, and multi-contact account directory
- CSV, business-card, and QR capture with field mapping, review, and export
- Categories, smart segmentation, dedupe, and guided List Builder
- Verified, estimated, and reviewable enrichment for email, phone, LinkedIn, and title
- Unified timeline of emails, calls, and meetings
- AI lead scoring 0-100 with Revenue DNA badges
- Agent Log plus call, email, and task creation on every record
- Contact-level engagement history and relationship context across every account

PIPELINE

- Dual Kanban: Prospects (6 stages) and Clients (5 stages)
- Drag-and-drop deals between stages
- Stage-by-stage deal velocity
- AI revenue forecast panel
- Commercial lifecycle from opportunity and proposal through quote, invoice, and payment
- Product catalog, deal import, proposal creation, and quote management
- Signed, declined, approved, and paid commercial-status tracking
- Stakeholder move detection when decision-makers change jobs
- AI Account Manager on every client deal

ANALYTICS, REPORTS, AND GOALS

- Revenue DNA winning patterns with AI playbook generation
- Loss analysis, deal velocity, conversion, revenue-by-source, and trend tracking
- Market Intelligence and localized insights from your own data
- Custom dashboards, saved views, widgets, templates, and generated reports
- Report scope by lead, deal, rep, team, email, call, and related activity
- Goals with AI targets and pacing: Ahead, On Track, Behind, At Risk
- AI-created tasks, urgent callback alerts, and smart categorization

Specialized AI agents for prospecting, outreach, scheduling, coaching, and follow-up.

Every Rep Gets a Team of AI Analysts.

AI AGENT COMMAND CENTER

- 20 specialized AI agents dispatched in plain language
- Multi-agent orchestration with shared memory and clear agent architecture
- Digital twin setup: voice selection, personality and tone
- Knowledge base upload to train your agents
- Per-channel activation: voice, SMS, email
- Live event feed, agent health monitors, manual override
- Background workflow actions with trigger-action builder and logs
- Persona Selling Agent adapts outreach to prospect psychology

OUTREACH AND SCHEDULING

- Branching email, LinkedIn, SMS, and voice campaigns with contact enrollment
- Visual flow builder with preflight checks and pre-launch simulation
- AI Rewrite on templates and A/B testing
- Smart send times by timezone and engagement history
- Scheduling across email, SMS, and WhatsApp with Google and Outlook availability
- Automatic calendar invitations, booking, and rescheduling
- Personalized newsletters and automated birthday emails to CRM contacts

ENGAGEMENT INTELLIGENCE

- Hot lead tiers by buying intent: Burning, Hot, Warm, Engaged
- Live feed of email opens, link clicks, and document views
- Real-time hot lead engagement toasts
- AI-prioritized inbox that surfaces urgent replies
- Email Intelligence: insights mined from your connected inbox

UNIFIED MESSAGING

- One inbox for email, SMS, and WhatsApp Business
- Internal team chat: DMs and group channels
- Typing indicators, read receipts, file attachments
- Rich text composer with CC/BCC and profile switching

Voice & Conversation

Calling, meetings, transcription, and conversation intelligence across the complete customer dialogue.

Your Pipeline Works the Phones While Your Reps Close.

AI VOICE CALLING

- AI outbound calling campaigns that converse and book demos
- Voicemail drop mode for volume outreach
- Inbound AI Receptionist answers FAQs, qualifies, captures leads, books, and routes
- IVR menus, business hours, and after-hours voicemail with transcription
- Warm live transfer to reps with machine detection
- Campaigns can call in your rep's own cloned voice
- Runs on your own business number
- Voice assistant on every page: commands, wake word, spoken data readback

NATIVE VIDEO MEETINGS

- Built-in video meetings, no third-party tools
- Multi-party rooms with guest links, per-person invites, chat, and host controls
- Screen share and background blur
- Demo rooms and Deal Closer demo room
- Demo Personalization Agent: prospect-specific demo scripts and live demo environments in seconds
- Meeting notes with transcripts, follow-ups, live captions, and co-pilot cues

CONVERSATION INTELLIGENCE

- Native and external Zoom, Teams, and Webex meeting ingestion
- Calls and meetings transcribed, summarized, and routed into Meeting Notes
- MEDDIC scoring, sentiment, talk-ratio, and stage analysis
- Objection, competitor, commitment, and buying-signal extraction
- Call metrics dashboard: connect rates, demos booked, win rates, and loss patterns
- Live captions and in-call co-pilot cue cards, objection handlers, and battlecards
- Automated follow-up recommendations and CRM activity context from every conversation

COACHING AND ENABLEMENT

- Win rate by stage per rep against team benchmark
- Loss pattern detection per rep and segment
- Real-time AI buyer rehearsal with transcript, talk ratio, saved scorecards, and scoring
- Training Room with company-specific modules, lessons, quizzes, assignments, and graded roleplay
- Methodology-specific rehearsal scenarios and rubric-based voice grading
- Saved attempts, scoring history, and manager-ready coaching evidence
- Pre-call briefs and automated post-call follow-up with CRM updates
- AI chat coach with document upload
- Exportable PDF coaching reports

Content creation, team execution, collaboration, and platform administration working together in one operating environment.

Everything Your Revenue Team Ships, Generated in One Place.

CONTENT AND DOCUMENTS

- AI-generated proposals, case studies, and ROI calculators
- Battlecards, discovery guides, and demo scripts
- Content Hub with create, edit, organize, and delete templates
- Editable AI Presentation Creator for branded decks from CRM data
- Sales decks, pricing guides, quotes, and invoicing
- Digital business card with QR code and VCard download

TEAMS AND ADMINISTRATION

- Admin, manager, and rep roles with invites, join codes, and domain auto-join
- Seat lifecycle, per-member feature controls, and AI credit caps
- Team grouping with colors, logos, live presence, and cross-team visibility
- Team performance reports and one-click coaching
- Stripe subscription portal, seat reconciliation, tier limits, and usage reporting
- Projects: tasks, notes, and client sharing
- 11 persisted user languages, right-to-left support, and branded AI support with escalation

SOCIAL STUDIO

- Publish to LinkedIn, X, Facebook, Instagram, TikTok, and YouTube
- Multiple named accounts with per-channel credential workflow and connection status
- Rich AI-assisted post drafts, media uploads, and image generation
- Recording Studio for screen and camera clips with background blur and shareable links
- Timezone-aware calendar for drafts, scheduled posts, and published posts
- Per-channel previews and results, including publishing status
- Reddit Radar and Keyword Intelligence for live buying conversations and tracking

GETTING STARTED AND PLATFORM

- AI Sales Assessment scores data, process, tooling, and capacity, then maps findings to platform fixes
- Guided onboarding wizard, interactive product tour
- Cost Calculator models current-stack spend, savings, and downloadable results
- Build Your Business turns scope, systems, AI, brand, and compliance inputs into a consultant-grade brief
- 140+ integrations across CRM, email, calendar, communications, data, documents, analytics, forms, and SSO
- Native Enrichment plus leading prospect, company, and place-data providers
- Native browser extension

Strategy, buyer intent, commercial workflows, and measurable revenue execution.

From Signal to Signature. One Operating System.

EXECUTIVE STRATEGY

- Daily Brief: risks, priorities, and next-best actions
- Today's Strategy recommendations tied to live revenue, pipeline, and engagement data
- AI Chief Revenue Officer weekly review with executive priorities and risks
- Usage-grounded Value Reports for adoption, time saved, and ROI by feature
- Revenue DNA, market intelligence, loss analysis, and generated action playbooks
- Saved executive dashboards and generated reporting for teams, reps, deals, and leads

INTENT AND LEAD CAPTURE

- Signals: funding, hiring, news, executive moves, and government opportunities
- Visitor and engagement capture from opens, clicks, document views, and activity
- LinkedIn browser scan creates, enriches, and assigns CRM leads
- AI company snapshots with live web research and validated intent context
- Reddit Radar surfaces live buying conversations and turns qualified opportunities into leads
- Lead tiers, scoring, routing, and ownership controls for immediate follow-up

REVENUE OPERATIONS

- Public signing lifecycle with invitations, reminders, signer statuses, and audit trail
- Proposals, quotes, invoices, product catalogs, approvals, and paid-status tracking
- Lead routing, ownership, assignment, and duplicate controls
- Bi-directional CRM sync with activity back-sync, sync health, and recovery status
- Cross-channel activity timeline, task automation, and reply monitoring for every lead
- Background workflows for new leads, won deals, inactivity, and overdue tasks

GROWTH AND CUSTOMER SUCCESS

- Webinars: registration, live delivery, reminders, replay, and recap
- Post-sale projects: timeline, Gantt, workload, tasks, notes, and client sharing
- Autonomous Account Manager for renewals, stakeholder follow-up, and at-risk clients
- AI Scheduling Assistant negotiates across email, SMS, and WhatsApp
- Google and Outlook availability, automatic invitations, booking, and rescheduling
- Client-facing progress visibility for onboarding and success work

Enterprise security, compliance, deployment flexibility, and credential control built for confident adoption at scale.

Built to Pass Your Security Review.

SECURITY

Sales Advisor deploys alongside your existing stack. Your credentials stay yours, your data stays isolated, and your CRM of record stays in sync.

- **AES-256-GCM encryption at rest**
- **TLS 1.3 in transit**
- **TOTP multi-factor authentication with recovery codes**
- **Enterprise SSO / SAML: Okta, Entra ID, Google Workspace**
- **Bcrypt password protection, session and IP security logging**
- **Single-session enforcement, rate limiting, secret redaction, and tenant data isolation**
- **Customer data is not used to train AI models**
- **Role-scoped data access and encrypted credential handling across integrations**

COMPLIANCE AND AUDIT

- **GDPR, CCPA, PIPEDA, and CASL controls**
- **Role-based access control and least-privilege data visibility**
- **Full admin audit trail and governed team administration**
- **Configurable AI retention with data export and deletion lifecycle**
- **Controller/processor model with DPA and data-subject support**
- **Documented subprocessors, data-transfer posture, and customer data-governance controls**

WHITE-LABEL BRANDING

- **Brand name, light/dark logos, favicon, colors, typography, and sizing**
- **Custom domains and subdomains with branded login and client-facing views**
- **Custom support contacts, demo link, chatbot identity, and legal copy**
- **Visibility controls for marketing, pricing, billing, PDFs, navigation, and headers**
- **Reseller workspace with multi-client and nested franchise views**
- **Approval workflow plus per-client and per-user switching**

YOUR CREDENTIALS, YOUR DATA

- **Encrypted credential vault for telephony, email, CRM, calendar, and AI providers**
- **User, organization, and profile-scoped connections with primary-account selection**
- **OAuth scopes, expiry, refresh, sync health, and connection-error visibility**
- **Your keys and tokens remain under your control across multiple accounts**
- **Choose your AI provider: OpenAI, Google AI, Anthropic, or xAI**
- **Organization and per-user AI usage and spend caps with metered safeguards**
- **Provider-aware AI routing, connection recovery, and account-level usage control**

Bring Your Own AI

New: Google AI Integration

Two AI Engines Can Now Run the Entire Platform.

OPENAI

FULL PLATFORM

- Runs all 20 AI sales agents and the Command Center
- Email, proposal, and content generation
- Sentiment analysis and lead scoring
- Live AI voice calling and campaigns
- Inbound AI Receptionist with call routing
- Call transcription and text-to-speech
- AI image generation for social posts
- Live meeting co-pilot during sales calls
- AI coaching chat and Rehearsal Room
- Workflow automations end to end

GOOGLE AI

FULL PLATFORM

- Runs all 20 AI sales agents and the Command Center
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Bring Your Own AI

More Options, Your Choice

PREFER ANTHROPIC OR XAI?

KNOW EXACTLY WHAT YOU GET.

ANTHROPIC

TEXT AI FEATURES

- Runs all 20 AI sales agents and the Command Center
- Email, proposal, and content generation
- Sentiment analysis and lead scoring
- AI coaching chat and document generation
- Social post copy and campaign writing
- Workflow automations end to end

Not available

Live AI voice calling and AI Receptionist · Call transcription and text-to-speech · AI image generation · Live meeting co-pilot

XAI

TEXT AI FEATURES

- Runs all 20 AI sales agents and the Command Center
- Email, proposal, and content generation
- Sentiment analysis and lead scoring
- AI coaching chat and document generation
- Social post copy and campaign writing
- Workflow automations end to end

Not available

Live AI voice calling and AI Receptionist · Call transcription and text-to-speech · AI image generation · Live meeting co-pilot

Pricing & Next Steps

Simple, Transparent Pricing

Start Free. Scale as You Grow.

FREE

$0 / seat / month

Get the CRM and start operating.

LIMITS
- Unlimited Leads & Contacts
- Unlimited Organization-Pipeline Deals

AI FEATURES
- 6 AI-Powered Sales Actions/User/Month

PLATFORM
- Manual CRM & Pipelines
- Dashboard & Pipeline Tracking
- Basic Analytics
- Email Integration
- View All Premium Workspaces

ELITE

$24 / seat / month

Start seriously executing with AI.

LIMITS
- Unlimited Leads
- Unlimited Deals
- Unlimited AI Commands

AI FEATURES
- AI Sales Coach
- Voice Commands
- Call Analysis
- Meeting Notes
- Predictive Scoring
- Revenue DNA Matching
- Buyer Intent
- Inbound And Outbound Calling Agents
- Behavioral Rep Coaching
- 20-Agent Command Center
- Cross-Agent Memory
- AI Sales Content Hub

PLATFORM
- Dashboard
- Full CRM & Pipeline
- Conversation Intel
- Full Integrations
- Dual Pipeline (Prospects + Clients)
- Unified Inbox
- Internal Team Chat
- Real-Time Engagement Toasts

SUPPORT
- Priority Support

ENTERPRISE RECOMMENDED

$49 / seat / month

Unlock the full AI-first sales execution environment.

LIMITS
- Unlimited Leads
- Unlimited Deals
- Unlimited AI Commands

AI FEATURES
- AI Sales Coach
- Voice Commands
- Call Analysis
- Meeting Notes
- Predictive Scoring
- Revenue DNA Matching
- Buyer Intent
- Inbound And Outbound Calling Agents
- Behavioral Rep Coaching
- 20-Agent Command Center
- Cross-Agent Memory
- AI Sales Content Hub

PLATFORM
- Dashboard
- Full CRM & Pipeline
- Native Browser Extension
- White-Label Branding
- 41 Language Support
- SSO / SAML
- Unified Inbox
- Internal Team Chat
- Real-Time Engagement Toasts

SUPPORT
- Dedicated Success Manager
- Dedicated Support
- 99.9% Uptime SLA

Sales Advisor