LiveKit Sales Coach — Build Cheat Sheet

Fora Soft Learn · AI for Video Engineering

1 - The non-negotiable rule (privacy first)

```
Deliver every tip over an RPC addressed to the rep's identity only.
perform_rpc(destination_identity=rep, method='coach_nudge', payload=...)
The coach publishes NO audio and NO room-wide broadcast. Prospect gets nothing.
```

2 - A coach = a note-taker + three new capabilities

Tool-calling	@function_tool fns the model calls (battlecard, CRM, discount check)
Screenshare sight	Subscribe to the screen-share track; sample still frames
Private channel	Addressed RPC to the rep; never room audio or broadcast

3 - Starter tool list (write a 'when to use it' docstring for each)

```
get_battlecard(competitor)        -> counter a rival the moment it's named
get_account_context(company)      -> open deals, notes, renewal date (CRM)
check_discount_authority(percent) -> is this discount allowed? approval step?
log_outcome(next_step)            -> write the next-best action back to CRM
```

4 - Latency budget (end of prospect sentence -> tip on screen)

```
STT 300 + decide 400 + CRM 500 + compose 500 + RPC 50  =  ~1,750 ms
Biggest controllable slice = the tool round-trip -> run slow tools in background.
Vision cost = frames sampled. ~600 frames at 1 frame / 3s over a 30-min call.
```

5 - Build-vs-buy + consent checklist

- [ ] Coaching lives inside your own product / data? Build on LiveKit (Cloud or self-host).
- [ ] Just need coaching on reps' Zoom/Meet calls? Buy a real-time coaching tool.
- [ ] Select the SCREEN-SHARE track specifically - not the camera, not the 'most recent' track.
- [ ] Rate-limit nudges (<= 1 every few seconds) so the rep is not drowned and turns it off.
- [ ] Disclose the AI at call start; get consent; confirm recording/AI rules with a lawyer.