

HOW TO SELECT

an AI Sales Teammate

Your Definitive Guide to Separating
Automation From Intelligence

vivun.

Introduction – Why This Guide Exists

The rise of AI in sales has created excitement—and confusion.

Hundreds of tools now claim to be AI Sales Agents, promising to automate and accelerate sales motions. But most of what's marketed as an “agent” today acts more like a responsive assistant than a true teammate.

Recognizing this gap, Gartner published “**Selecting an AI Agent Solution: Questions to Challenge Vendor Claims,**” a valuable guide to separating hype from innovation.

This guide builds on that foundation—offering **Vivun’s perspective as the pioneer of the AI Sales Teammate**. We’ll clarify how an Agent differs from a Teammate, define what real capability looks like, and help you make confident, future-ready investment decisions.

What is an AI Sales Agent?

Despite the buzz, most AI Sales Agents today perform narrow, predefined tasks.

They can automate simple workflows, respond to prompts, or execute repetitive actions—but their scope is limited.

At best, agents can:

✓ Complete a single, specific task inside a larger process

 Retain short-term context to execute commands

 React to inputs rather than reason across deals

Gartner advises buyers to ask whether an “agent” demonstrates persistence, autonomy, and contextual memory. Those are useful questions—but in practice, they only confirm whether a system can **function**, not whether it can **sell**.

At Vivun, we believe that’s table stakes. True innovation isn’t about agents performing isolated tasks—it’s about a **teammate** who understands your sales process, reasons across data, and contributes measurable value from first meeting to closed won.

The Difference Between an AI Sales Agent and an AI Sales Teammate

AI Sales Agents automate tasks. They react to prompts, execute workflows, and handle simple actions like generating summaries or updating records.

AI Sales Teammates go further. They understand context, reason like a seller, and proactively contribute to real outcomes throughout the entire sales process. A teammate doesn't just do what it's told—it thinks, advises, and acts with purpose.

CAPABILITY	AI SALES AGENT	AI SALES TEAMMATE
Automates Tasks	✓	✓
Retains Memory and Context	✗	✓
Works Across the Entire Sales Cycle	✗	✓
Proactively Delivers Outputs	✗	✓
Applies Reasoning and Judgment	✗	✓

Gartner's Questions – And What They Reveal

Gartner recommends asking vendors:

- Is this truly an agent or just a workflow?
- Does it retain and use memory?
- How autonomous is it?
- Can it evolve over time?

Those are the right questions—but not the complete ones.

To find a true AI Sales Teammate, go further:

- Does it integrate with my sales process and CRM data?
- Can it reason across deals and generate actionable insights?
- Will my team trust its outputs enough to rely on them in front of customers?
- Does it deliver measurable work products that impact deal velocity and win rates?

Vivun's Framework for Evaluating AI Sales Agents

We propose a 8 questions to set the framework for an evaluation:

1. Do you need multiple AI sales agents to handle discrete tasks—or a single, unified teammate that supports your reps throughout the entire sales process?
2. Does your AI sales agent deliver value immediately out of the box—or does it require months of consulting, customization, and prompt engineering before it's usable?
3. Before meetings, does your AI sales agent provide meaningful account and stakeholder context—or does it simply retrieve surface-level data from your CRM?
4. During live customer calls, can your AI sales agent actually assist in real time with accurate, deal-specific insights—or does it stop at passive note-taking and transcription?
5. After meetings, does your AI sales agent generate actionable summaries, follow-ups, and sales assets—or does it just log activity for someone else to process?
6. Does your AI sales agent reason like a seller—understanding your methodology, deal stages, and buyer intent—or does it only automate predefined tasks?
7. Can your AI sales agent autonomously create work products such as stakeholder maps, value cases, and handoff docs—or does it rely on human prompts every time?
8. Is your AI sales agent fully integrated with your existing systems, reasoning across CRM, enablement, and call data—or does it operate in isolation from them?

Comparing Solutions

EVALUATION CRITERIA	GENERIC LLM TOOL	AI SALES TOOL (AGENT/COPILOT)	VIVUN'S AVA (AI SALES TEAMMATE)
Provides one teammate for the entire sales process	One-off chatbot ✗	Multiple narrow-use tools ✗	A single teammate that supports before, during, and after every meeting ✓
Delivers value out of the box—no consulting required	Needs heavy prompt training ✗	Requires manual setup ?	Works immediately with built-in prompts, reasoning, and integrations ✓
Provides meaningful account and stakeholder context before meetings	Surface-level answers only ✗	Limited prep insights via CRM data ?	Deep, contextual understanding drawn from CRM, email, and past calls ✓
Assists in real time during customer meetings	No in-call capability ✗	Basic transcription or note-taking ?	Real-time guidance, insights, and answers ✓
Generates actionable outputs after meetings, including coaching	Static text summaries ✗	Activity logging only ?	Produces tailored follow-ups, summaries, and sales coaching ✓
Reasons like a seller using your methodology and stages	Generic responses ✗	Rule-based workflows ?	Powered by a Sales Reasoning Model ✓
Creates proactive, measurable work products (stakeholder maps, handoffs, value cases)	Requires manual prompting ✗	Automates templates ?	Generates sales assets autonomously ✓
Integrates across CRM, call, and enablement systems	Isolated from sales stack ✗	Partial or manual integrations ?	Unified context across all systems for complete situational awareness ✓

Meet Ava – The World’s Most Advanced AI Sales Teammate

Ava doesn’t just assist. She sells with you.

Before the meeting, Ava researches accounts, gathers context, and helps reps prepare. During the call, she listens, answers questions, and provides real-time insights. Afterward, she summarizes the conversation, creates follow-ups, and updates deal records automatically.

With Ava Assist, the Sales Reasoning Model, and Accelerators, Ava brings the collective intelligence of your best sellers to every deal—helping teams sell smarter, faster, and better from first meeting to closed won.

What Are You Waiting For?

Most AI “agents” automate.

Ava collaborates. She’s not just a digital helper—she’s a true teammate who thinks, reasons, and delivers measurable results across the entire sales cycle.

Meet Ava – and see what a true AI Sales Teammate can do:

Visit www.vivun.com/demo

About Vivun

Vivun delivers the world’s most advanced AI Sales Agent—automating the critical work required to move complex deals forward. By generating sales-ready outputs that help every rep engage stakeholders, build value, and drive urgency, Vivun empowers sales teams to close more deals, faster.

To learn more visit www.vivun.com.