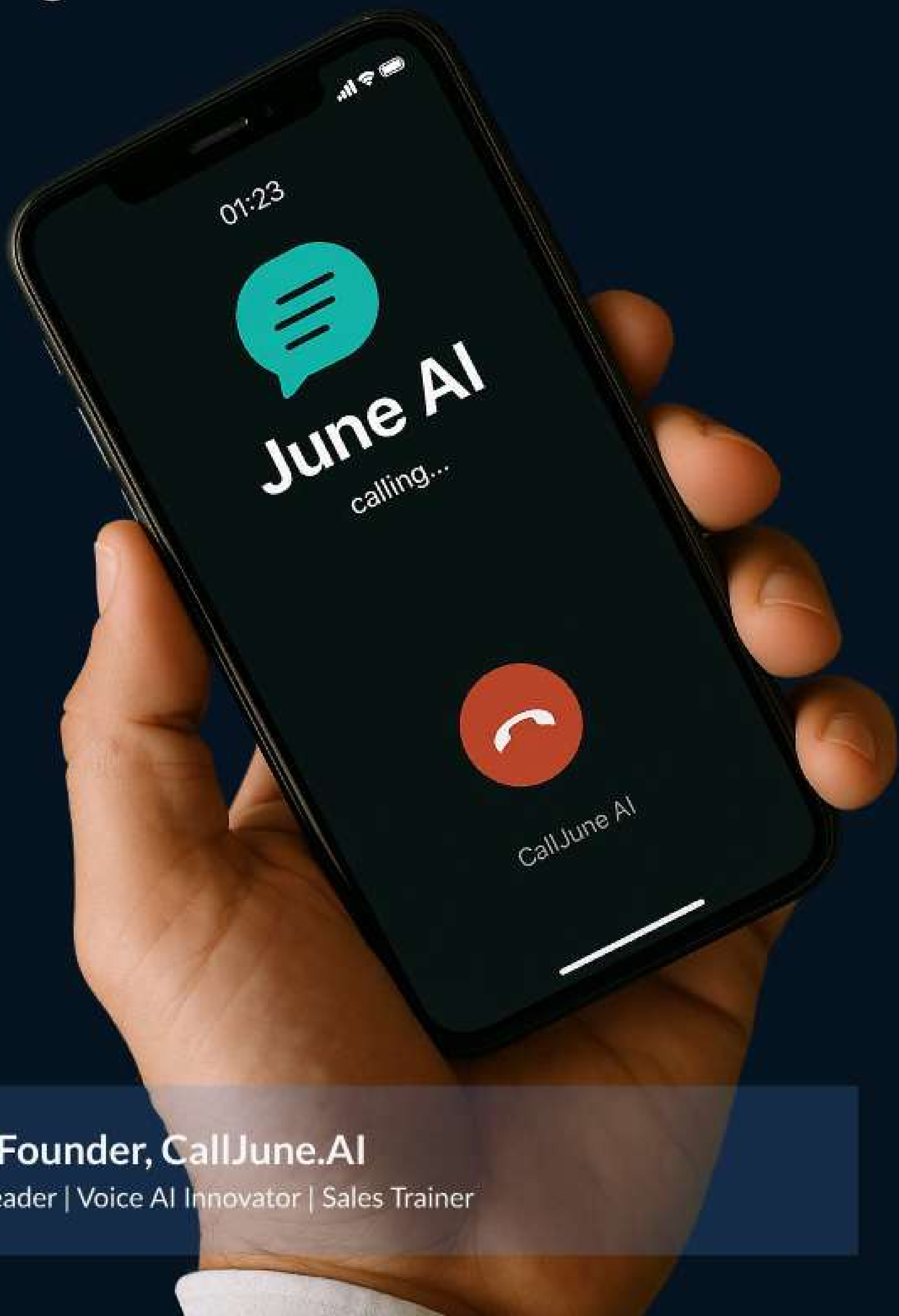
Field Sales Is Bleeding Time and Sales — Voice Automation Can Stop It

Reclaiming Lost Selling Time with Conversational AI



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Section 1:

Executive Summary

Field sales organizations are at a tipping point: admin load is climbing, data quality is falling, and coaching is sporadic at best. Sales leaders can feel the drag on performance, but often don't know what to do about it. The tools they've leaned on—CRM, enablement platforms, coaching dashboards—are stuck in a loop of more input, more friction, less adoption. Recent leaps in large language model (LLM) voice technology offer a way out. This white paper explains how conversational AI—especially when deployed pre- and post-meeting in the rep's natural workflow—can dramatically improve capture, coaching, compliance, and close rates.

In the pages that follow, you will:

- See the hidden math behind poor CRM input
- Understand why traditional "fixes" fail
- Discover the measurable impact of voice AI
- Get a 60-day rollout plan with implementation details
- Learn how CallJune.AI helps teams scale adoption and results without the usual resistance

By the conclusion, you'll know exactly how to pilot conversational AI, what metrics to track, how to get rep buy-in, and how to turn your field team into a high-output, insight-rich, CRM-compliant sales engine—without pulling them out of the field or crushing their time.

The CRM Input Crisis

> *Selling is a contact sport—but the data doesn't show it.*

Every day, field reps gather critical insights in face-to-face meetings. Yet most of that gold never makes it into your CRM. Why? Because the systems designed to "capture everything" were never built for reps on the go. They're often built for managers, not mobility. This leaves leadership blind to the very insights they need to guide the business. It's not just annoying—it's a compounding liability. This section shows what's being lost, what it's costing you, and why the current system is broken by design.

The Hard Numbers

28-33%

Sales representatives spend only **28-33% of their week actively selling**. The rest is consumed by administrative tasks, meetings, and other non-revenue-generating activities, effectively stealing a full selling day each week. This includes a significant portion dedicated to manual data entry.[1]

23%

Manual data input is a major challenge for 23% of CRM users, leading to lost insight and impacting deal visibility.[2]

72%

72% of sales leaders admit their forecasts are off by more than 10%.[3]

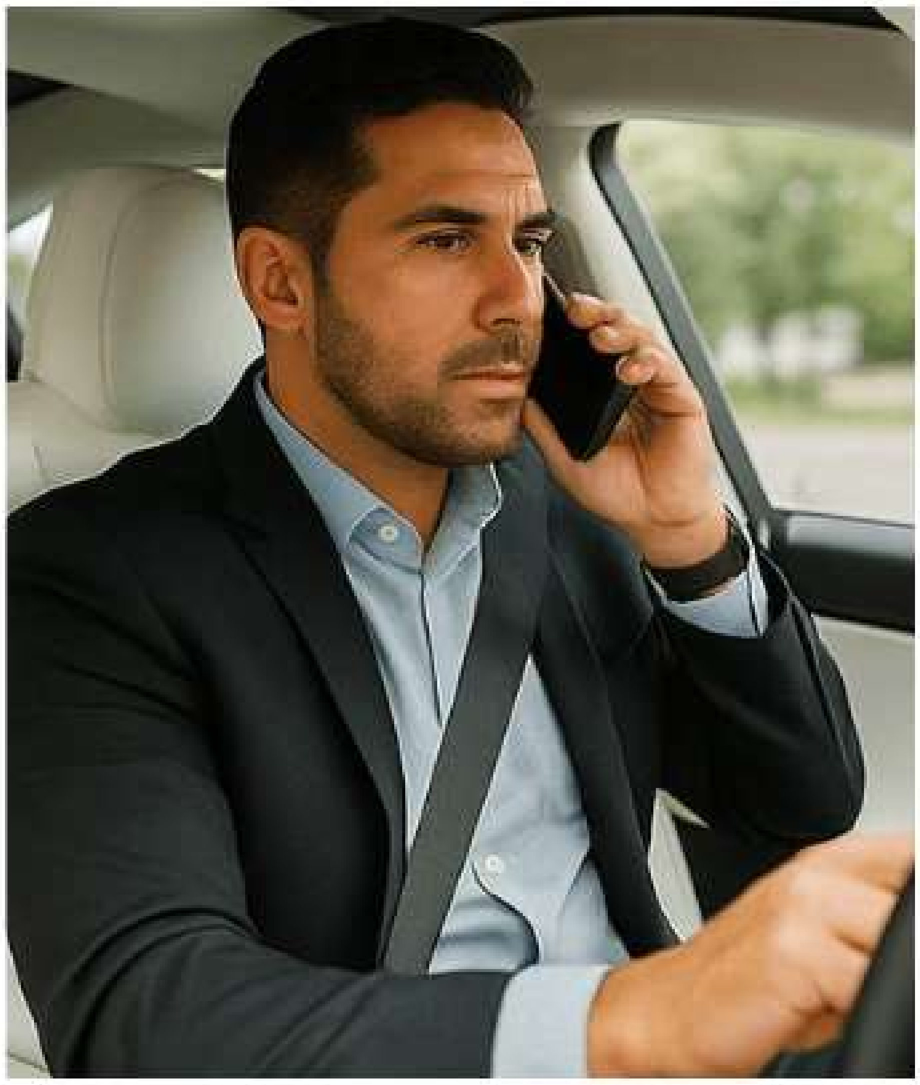
$15M

The average annual cost of bad or missing data for businesses can be staggering, estimated at **$15 million per year for mid-sized firms** and reaching into the trillions across the U.S. economy.[4]

Let that sink in: every week, one of your five sales days is wasted just typing. And even with that effort, your forecast is still unreliable because a third of the funnel isn't even visible.

A Day in the Life — Jim's Monday

Jim finishes a fantastic meeting with a strategic account. He walks out with key intel: timelines moved up, the buyer wants financing options, and a competitor stumbled. He wants to capture it while it's fresh, so he opens his CRM app. He fumbles through a two-factor login. He gets a bad connection in the parking lot. When he finally opens the opportunity record, he sees 17 required fields. Frustrated, he types "TBD" or "-" and moves on. The gold from that meeting? It's gone. The deal will be reviewed by leadership two weeks later based on data that was never entered. Multiply that by every rep on your team.



Why Great Data Dies in the Field

CRMs assume reps have time, space, and clarity to stop and type. But in the field, they're:

- Driving to the next meeting
- Managing texts and client calls
- Navigating badge readers and building security
- Trying to remember what happened five minutes ago
- Dodging log-in issues and security timeouts

CRMs are designed for structured data, but sales conversations are messy, fast, and full of nuance. That disconnect is why even good reps often skip or fudge entries. It's a human problem, not a discipline problem.

The Hidden Tax You're Already Paying

Every deal that disappears from the system doesn't just harm reporting—it destroys forecast accuracy, marketing alignment, and coaching opportunities. Managers spend more time interrogating the pipeline than improving it. Marketing can't tie campaigns to revenue. And leadership ends up making high-stakes bets on bad data. This "unknown unknown" tax is real—and it's quietly burning your budget and people every single day. The financial impact of poor data quality includes wasted resources, missed opportunities, and potential compliance risks.

What This Means for Leadership

Before you optimize your pipeline, fix your data ingestion inputs. Before you scale AI forecasting, get real-time, human-level data flowing in. If you want better visibility, better coaching, and better revenue planning, it all starts with one question:
How do we capture the truth of every sales interaction—automatically, immediately, and at scale?

Why Traditional Fixes Fail

> *The old playbook is adding friction, not solving it.*

When sales data goes missing or CRM use drops off, most organizations instinctively reach for what they know:

- more required fields,
- another round of training, or
- stricter enforcement

But here's the hard truth - these fixes often make things worse. They pile on friction, frustrate your field team, and erode trust without improving outcomes. This section explores the most common "solutions" sales leaders reach for—and why they backfire in today's reality.

Six Well-Intentioned Fixes That Fail

Conventional "Fix"	Why It Backfires
More required fields	Each extra field reduces form completion. Reps often input dashes, TBDs, or skip altogether.[5]

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OTP/VPN hoops	Reps lose 5–6 minutes a day just accessing CRM tools—costing them up to 2 sales calls a week.[7]
One-time training	**70% of sales skills fade within a week if not reinforced.**[8] Without real-time application, most training dies on the vine. Companies with **on-demand, accessible learning see 30-50% higher skill application and improved performance.**[9]
Friday pipeline scrubs	Managers become enforcers. Reps bulk-edit from memory. Deal intel becomes fiction.
DIY spreadsheets	While specific error rates vary, manual data entry is prone to significant errors, leading to **financial losses and operational inefficiencies**. Relying on spreadsheets for dynamic sales processes can be a costly mismatch.[10]

The Hidden Cost of "Unknown Unknowns"

These outdated approaches don't just inconvenience your reps. They obscure the true health of your pipeline. When your CRM is full of placeholder text and backfilled "best guesses," the risks compound silently—missed forecasts, mistimed resource planning, and blind spots in revenue intelligence. You're not just flying blind—you're flying with bad instruments.

Story: When the App Doesn't Match the Field

At a well-funded MedTech startup, reps were told to log every meeting via a mobile CRM app within 30 minutes. The problem? Spotty reception, limited time between appointments, and a clunky interface. Over time, most reps jotted notes in their phone's Notes app or tried to remember everything at the end of the day. The CRM looked clean, but when managers followed up—asking "What did the CMO say Tuesday?"—the info just wasn't there. Insight was slipping through the cracks. Morale dipped. Forecast confidence fell.

Key Takeaway

Sales leaders must stop treating CRM friction as a compliance problem. It's a design problem. If the system isn't built for how reps actually work—on the move, by voice, under pressure—it will never capture the truth of your deals. What you need is enablement that works in motion, not enforcement after the fact.

Conversational AI Changes the Game

> *You've heard about AI. But this is different.*

Sales leaders know AI is changing the game. But most assume it's happening in analytics, email writing, or maybe forecasting. They haven't considered that the real breakthrough isn't what AI can generate—it's what it can capture. What if your reps could make a call after every sales meeting- not to a manager, not to a CRM—but to their own private assistant? A voice assistant that knows their Salesforce, knows their sales playbook, and even knows them. One that helps them remember what matters, structure their thoughts, and update the system without touching a keyboard.

Let's walk through how that works—and what it means for your team.

What It Looks Like in the Field

Maria just walked out of a customer site visit. Her phone buzzes. She dials a number saved as "June AI."

J

June

Hi Maria! Ready to debrief your last meeting? I'll guide you through it.

Maria

Yeah. It was with the facilities manager at Baxter. I walked through the energy audit results and they were happy with the $8K projected savings. They want an updated proposal with a different installation schedule

M

J

June

Got it. Do you want to log this under Baxter's Opportunity in Salesforce? Was budget discussed?"

Maria

No budget numbers yet.

M

J

June

Okay, marking that as incomplete. Did they agree to a follow-up?"

Maria

Yes—next Tuesday at 10am.

M

J

June

Great. I'll set that task. Summary saved. Want to hear it back?

How It Works (Under the Hood)

Behind the scenes, here's what just happened:

Call captured

Maria's call is recorded and transcribed with accurate speech recognition.

Context parsed

The AI detects entities like "Baxter," "energy audit opportunity," "$8K," and "Tuesday at 10am," then maps them to the correct fields.

CRM updated

Salesforce gets a clean summary note, a task for follow-up, and updates the deal, in minutes with no typing.

Methodology aligned

June notices no budget was discussed, so it flags the deal as needing financial qualification (e.g., MEDDIC).

Why It Matters

This isn't a chatbot. This is an intelligent voice workflow, embedded into the rep's day like a trusted teammate. It's fast, private, and emotionally intelligent. And the benefits stack up quickly:

Data capture skyrockets —
because it's easier to talk than type.

Methodology sticks —
because reps get nudged in the moment, not 3 days later.

Coaching improves —
because reps get timely deal insights they can act on. Companies combining AI with sales coaching see a **3.3x increase in year-over-year sales quota attainment.**[11]

CRM adoption increases —
because it happens easily for the rep, without extra work.

Forecasts improve —
because deal health and details are updated in near real time. AI can improve forecasting accuracy by **up to 25%.**[12]

Wrap-Up: The CRM Isn't Dead. It Just Needs a Voice.

Salesforce, HubSpot, and other CRMs are still vital. But they were built for desktop users, not people in parking lots with 4 minutes before their next call. Conversational AI doesn't replace your CRM—it unlocks it. When your system of record is fed by voice, coached by AI, and aligned with how reps actually think and work, you create something rare in sales ops: insight at scale.

60-Day Implementation Roadmap

This isn't a two-year digital transformation. It's a 6-step sprint that fits in your budget and calendar. Too many sales tech rollouts die in "IT Queue Hell." But deploying conversational AI doesn't require overhauling your CRM, retraining your whole team, or ripping out existing workflows. Instead, it layers into the way reps already operate—and the pilot phase can be up and running in less than 45 days. The roadmap below is built on a simple idea: quick sprints that prove value fast, involve the right people early, and focus on adoption, not just tech integration.

Sprint 1: Vision & Governance (Week 1)

- CRO names an AI Champion and defines a success KPI (e.g., meeting capture rate, pipeline coverage).
- Revenue Operations, Sales Enablement, and Security align on goals, scope, and user access.
- Pilot rep cohort (4–6 reps) is nominated for training and feedback loops.

Sprint 2: Stack & Security Readiness (Week 2)

- Create Salesforce sandbox (or clone instance) for test data flow.
- Generate and validate Conversational voice AI/CallJune.AI API keys, webhooks, and login permissions.

Sprints 3–4: Pilot Design, Prompt Tuning & Go-Live (Weeks 3–4)

- Workshop AI prompt session to align with your methodology (e.g., MEDDIC, SPIN).
- Configure call routing, rep identification, and CRM field mapping.
- Rep onboarding and usage training (5-minute demo, test calls).
- Begin live customer call debriefs via CallJune.AI.
- Stand up Slack/Teams support thread for fast feedback.

Sprint 5: Results & ROI Review (Week 5)

- Create reports to track conversational AI usage, quality, and time-saved data dashboard.
- Sales Ops reviews:
  - Capture rates
  - Methodology match
  - CRM write-back accuracy
- Leadership aligns on go/no-go for broader rollout.

Sprint 6: Rollout & Iteration (Weeks 6–8)

- Expand to additional teams or territories.
- Launch Manager Dashboards.
- Collect rep testimonials and usage patterns.
- Refine prompts and flows using real data (on-going).

Pilot Budget (for 5 reps / 30 days)

Let's demystify the costs:

Line Item	Estimate
Voice Minutes (≈ 300 total)	$186
LLM + Vector DB	$250
Salesforce API usage	Typically covered in existing license
Prompt & Workflow Design (Consulting)	$8–10K
"Integration Support (Webhook, Security, QA)"	$16–19K
"Internal Time (Enablement, RevOps)"	~$10K
Total Investment	**≈ $35K**

Most companies find a single net-new deal sourced or saved during the pilot covers this cost 2–3×, making this one of the highest-return pilots in the entire GTM tech stack. **AI-driven sales enablement can lead to a 25% increase in pipeline growth and 76% higher win rates.**[13]

Wrap-Up: You can test this in 60 days, no slide deck required.

This isn't a science project. It's a two-month runway to a working, rep-friendly, revenue-impacting solution. By the time your competitors schedule a planning call, your team could already be speaking into CallJune.AI, closing more business, and looking like heroes on your dashboard.

Operational Playbook: Turning Pilot Wins into Lasting Change

> *Pilots don't scale themselves — they graduate with structure.*

Most sales tech pilots never become programs. It's not because the tech fails; it's because no one prepares the team for what comes after the pilot. Reps go back to their routines. Managers get busy. The initial lift flattens. But when you treat a conversational AI rollout like any major go-to-market launch — with rituals, roles, success metrics, and iteration — you build a foundation that sticks. This section offers a clear, field-tested blueprint to help teams move from "We tried it" to "We transformed our workflow." If you're a CRO, VP of Sales, Enablement Director, or RevOps owner, this is your cheat sheet for making conversational AI a permanent part of your sales DNA.

Pilot Do's: The Habits That Lead to Wins

Start small, measure big

Run your pilot with 3–5 carefully chosen reps. But don't skimp on measurement. Capture metrics like:

- Call-to-CRM latency
- % of meetings captured
- Rep satisfaction pulse
- Number of key follow-up tasks captured and completed
- Win-rate lift on documented opportunities

Use your playbook's language
Align prompts with what your reps already know: SPIN, MEDDIC, Challenger, BANT — whatever you coach, bake it in. Avoid "AI-speak." When reps hear a familiar structure, they lean in.

Coach managers first
A frontline manager can make or break adoption. Give them a short CallJune.AI demo, a few examples of call recaps, and show how it frees them up for real coaching. Equip them to be internal champions.

Celebrate time, not just deals
Highlight hours reclaimed from admin, not just closed deals. Time is a universal motivator, and many reps love to hear "You got an hour back today!"

Build a "dead-letter queue"
If a call fails to transcribe or write back to CRM, have a safety net. Store it securely, notify the rep, and fix it within 24 hours.

Pilot Mistakes to Avoid

Don't boil the ocean
Avoid launching AI, a new methodology, a new comp plan, and CRM updates all at once. It confuses reps and muddies ROI.

Don't skip sandbox testing
Validate every webhook, every field mapping, every prompt interaction. Your reps shouldn't be your QA testers.

Don't delay security sign-off
Involve InfoSec and Legal during the pilot design, not after the go-live. A blocked rollout after a successful pilot kills momentum — and credibility.

Don't let prompt sprawl
Keep V1 tight and consistent. Let reps master the first wave before you iterate. Bad AI prompts are murder in the field.

Pitfall Checklist: Know What Can Go Wrong and Why

Pitfall	Mitigation
Giant audio transcripts clog CRM	Store audio securely elsewhere; only store 150–200-word AI summaries in CRM
Prompt bloat	Keep your prompts clean so calls are streamlined- do not roll out new AI prompts on your team that are untested.
Manager skepticism	Auto-email report and data capture summaries to managers daily so they see value without asking
Rep burnout	Keep voice debriefs to under 2-3minutes; test tone and pacing

Bonus tip:
Include your rep pilot group in your internal town hall or SKO. Let them share results — peer credibility is gold.

Wrap-Up: Make it feel like an upgrade, not an assignment.

Most change efforts fail because they feel like chores. But this doesn't have to. A well-run AI voice assistant removes pain — it doesn't add it. When reps say, "It just works," and managers say, "Now I have the insights to coach," you've won. Follow this playbook, and your AI assistant becomes a daily habit — not another dashboard collecting dust.

People-First Leadership & Adoption

> *Tools don't change behavior — but motivation does.*

One of the most common mistakes in sales tech adoption is assuming logic alone will win. "It saves time," you say. "It helps Finance," you add. But none of that matters if the rep doesn't feel emotionally bought in. Adoption doesn't happen through enforcement — it happens when the rep believes this tool is for them. Voice AI must feel like a personal assistant, not a micromanagement device. That's why leading teams pair technical rollout with motivational design. They speak the rep's language. They link outcomes to autonomy, mastery, purpose, and belonging. They design nudges and feedback loops that feel human — because sales is still a human game. This section breaks down how to think like a behavioral designer and equip your team for long-term, high-trust usage.

AMP + B: Four Intrinsic Motivators That Matter

Sales reps aren't coin-operated (contrary to popular belief). Sure, comp plans drive effort, but daily behavior is often governed by less visible forces. **The AMP + B framework — Autonomy, Mastery, Purpose, and Belonging** — is a proven way to analyze and enhance intrinsic motivation. This aligns with **Self-Determination Theory (SDT)**, which highlights how supporting competence, autonomy, and relatedness fosters true engagement.[14] Here's how conversational AI can unlock each one:Run your pilot with 3–5 carefully chosen reps. But don't skimp on measurement. Capture metrics like:

Lever	Old-School Fix	People-First AI Move
Autonomy	"Fill the fields by Friday."	Rep chooses when and how to recap — voice lets them do it on their terms.
Mastery	Annual sales training- and forget 90% by the next month.	CallJune.AI reinforces methodology in the flow, nudging reps to remember great habits and key questions in the moment.

Purpose	"It helps management track deals."	AI opens with: "Client history secured. Your follow-up will be sharp." The benefit feels personal.
Belonging	Leaderboard emails or public shaming on missed entries.	Dashboards show team-wide wins — hours saved, insights gained.

Real-world parallel: Great sports coaches don't just bark from the sidelines. They review the tape, offer targeted nudges, and celebrate progress. Voice AI, when done right, acts the same way — always available, never judgmental, tuned to your game.

Proven Plays for Long-Term Adoption

Many great pilots fizzle out simply because the team didn't map the human adoption curve. These four plays will keep your rollout sticky and your team engaged:

The "Give-Back" Pitch
Frame the rollout as a time dividend. "We're giving you 5 hours back this week — no strings attached." Reps are more likely to try something when it feels like a gift, not a chore.

Gamified Opt-In Streaks
"Log 5 perfect recaps this week, and the team buys lunch." Friendly competition creates habit loops — and reps begin to self-reinforce the behavior.

Friday Win & Learn Huddles
Collect three great moments from the AI: smart phrasing, strong qualification, or upsell questions asked. Share them in 15 minutes. Make excellence visible.

Pro tip
Stack your first few weeks with small wins. A one-minute time save. A reminder that lands. A forecast call with clean notes. Don't chase big bang transformation — chase traction.

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60-Day Scorecard Targets for the Field

How will you know it's working? These are benchmark metrics across real field deployments. Use them to calibrate progress, inform leadership, and secure continued investment.

Metric	Target (60 Days)	Why It Matters
Rep engagement pulse	↑ 15 pts (via survey)	Tells you how reps feel about the tool
Meeting capture compliance	≥ 85 %	Core adoption indicator
Manager deal-chase emails	↓ 30 %	Managers spend less time tracking down info
Forecast variance	≤ 5 %	Better visibility = smarter revenue decisions
Incremental pipeline (per 10 reps)	$1.5M–2M	Real ROI tied to improved execution; **AI can lead to 25% pipeline growth.**[15]

Wrap-Up: Culture eats tooling for breakfast.

This isn't about software. It's about creating a sales culture where every call matters, every insight is captured, and every rep has the chance to get better- daily. When AI acts as a coach, not a critic, and managers reinforce progress over perfection, your people don't just adopt it. They own it. And that's when transformation happens.

KPIs & Measurement

If you can't measure it, you can't scale it. Voice AI isn't just about saving time — it's about making revenue more predictable and teams more coachable. But none of that matters if you're not tracking the right signals. Sales leaders have been burned before by flashy tools that promised uplift but delivered confusion. That's why measurement must be simple, sales-friendly, and aligned to your current workflows. If you can't show progress on a dashboard (and tie it to behavior), your program will stall. This section gives you seven rock-solid KPIs, drawn from real field rollouts, that help you prove adoption, track improvement, and tie outcomes to dollars.

The 7 KPIs That Matter Most

KPI	What It Measures	Why It Matters
1. Capture Compliance	% of meetings logged via voice vs. typed or skipped	Core adoption signal: tells you if reps are actually using the system
2. Next-Step Creation Rate	# of follow-up tasks created per meeting by AI	Directly tied to deal momentum and pipeline health
3. Data Latency	Time from end-of-call to CRM update	Lower latency = fresher data, better coaching, faster forecasts
4. Methodology Adherence	% of recaps with SPIN, BANT, MEDDIC fields filled	Reinforces sales training in the flow; boosts consistency
5. Coachable Moments Share	Gaps AI detects (e.g., no budget discussed)	Helps reps remember the insights and questions to close smarter, not harder
6. Rep Admin Time	Weekly time spent on CRM updates	Efficiency metric — time saved is time sold

Analogy: Think of these KPIs like the dashboard of a race car. You don't just care about speed (pipeline). You care about oil pressure (adoption), fuel mix (data quality), and tire wear (rep fatigue). The full view gives you control.

Future Vision: From Pilot to Platform

> *You're not just testing a tool. You're building a data engine that gets smarter every day.*

transforms how insight moves through your organization. When voice input becomes the norm, your CRM stops being a graveyard of incomplete fields and starts becoming a living system of record — accurate, timely, and reflective of real conversations. This section looks over the horizon to show you what's next: an interconnected sales ecosystem where every call, every note, every follow-up, and every coaching moment flows through one intelligent layer — the rep's voice.

Voice Data Is the New Oil

The teams that win in the next decade won't be the ones with the most reps. They'll be the ones with the best data. Right now, your sales team has the data — in their heads, on napkins, in hallway conversations — but it never makes it into the system in time. Conversational AI unlocks that data stream. When reps speak their post-call notes and the system parses, tags, and stores them, you start building a proprietary knowledge base of:

- Deal dynamics and objections
- Voice-of-customer trends
- Competitor mentions
- Rep performance patterns

From One Use Case to Full Stack Enablement

A successful 5-rep pilot focused on post-call logging is just the beginning. Once conversational AI proves its ROI, the architecture and workflows are already in place to scale into new domains:

Pre-call prep: Conversational AI can brief reps on past activity, highlight missing intel, or recommend discovery questions.

Coaching feedback loops: Reps receive insightful sales tips, making coaching 10× faster.

Post-call analysis and intelligent summaries: AI can generate concise, actionable summaries from call recordings, saving time and ensuring key details are captured automatically, improving efficiency and data accuracy.[17]

The investment in voice AI creates compounding value over time. You're not implementing just a tool — you're standing up a new capability in your sales organization.

Early adopters won't just close more deals. They'll redefine how selling works. In the old world, the sales rep was a lone actor — dialing, meeting, remembering, typing. The future is team-enabled. When your AI remembers key details, coaches in real-time, and gives leadership live visibility, reps sell better because they're not selling alone. Conversational AI doesn't replace the sales manager. It completes the manager— and that completion is what makes the next decade of sales transformation possible.

What Happens Next

The future isn't five years away – it's 30 days from now. Most sales leaders want to innovate but don't know where to start. They hear about AI, voice enablement, automation – but all too often, it sounds like "nice-to-have" technology that'll require a massive lift to implement. Not so here. Launching conversational AI is fast, low-risk, and self-funding. All you need is a handful of reps, a clear KPI, and the willingness to let real-world performance guide your decisions.

To start:

- Run a 60-day, 5-rep pilot
- Pick 1–2 KPIs to track (e.g., meeting capture compliance, task creation, rep admin time)
- Stand up in <30 days, with minimal IT or security friction
- Payoff usually comes in 2–3 weeks through reclaimed time and cleaner pipeline visibility

This isn't a thought exercise. It's a working solution you can deploy this quarter. The teams doing it are already seeing lift in pipeline, accuracy, and rep satisfaction – and they're expanding quickly.

Final Word

Reps want to sell. Managers want to coach. Executives want forecast certainty. Voice automation gives each exactly what they need- without forcing more effort or more oversight. The only question left is: Who moves first?

> *"We saw real behavior change in a week. Reps were logging more, saying less, and focusing better on follow-up."*
>
> *— VP of Sales Ops, mid-market B2B*

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Buyer Enablement Sidebar

Decision-Maker FAQs

Because this is more than a tech tool — it's a cross-functional win. Let's take a quick tour through how each key stakeholder benefits from rolling out a conversational AI sales assistant:

CFO: Show Me the Money

- Pilot ROI is fast: 2–3x return in <90 days via increased pipeline and reduced labor waste. AI in sales can boost revenue by **10-30%.**[18]
- No infrastructure overhaul required — use existing CRM and voice stack
- Budget predictability with metered usage and tiered rollout

CIO / Security: Keep It Tight

- SOC 2 compliant
- OAuth / JWT secured
- Data routed through enterprise-grade voice APIs
- Raw audio is excluded from CRM for cost and compliance

CRO: Drive Adoption, Not Resistance

- Reps don't change tools — they just call in their notes
- Managers get more coaching leverage with less time drain
- Forecasting and methodology compliance improve without policing. AI can improve sales forecast accuracy by **25%.**[19]

RevOps: Clean Data at the Source

- CRM gets real-time updates tagged to the right opportunities and contacts
- Fewer "TBD" and "N/A" placeholders in Salesforce
- Higher fidelity data supports dashboards, QBRs, and revenue intelligence tooling

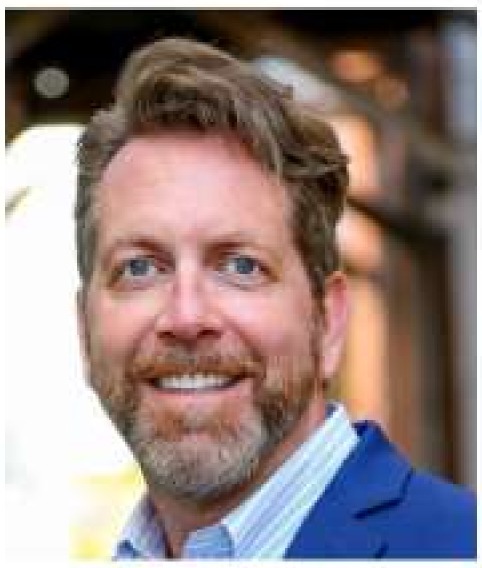
Field Reps: Save Time, Sound Smarter

- One short call = CRM updated
- No more typing while driving
- Contextual coaching, not canned scripts
- Look better to your manager without more work

Want to Learn More?

Run a pilot. Ask your reps. Track your KPIs. Let the results make the case!

Contact us at Shawn@CallJune.Ai



Shawn Johnson is the founder of CallJune.AI and a 25+ year B2B sales veteran who has led complex CX/BPO deals for brands like Alorica, Foundever, Concentrix, and TaskUs. A former sales trainer and teaching pastor, he brings a people-first lens to technology—believing coaching beats compliance and relationships outlast dashboards. After watching sales reps drown in CRM admin and miss sales cues while leaders guessed at forecasts, Shawn built June, a voice AI assistant that captures real post-call insight, reinforces methodology, and feeds clean data back to the business. He lives in Southern California with his wife, two daughters, and three dogs, and still sneaks in ocean swims and electric unicycle rides whenever possible.

Glossary of Key Terms

Term	Definition
Conversational AI	An AI system designed to understand and respond to natural human language — in this case, used to capture and summarize sales conversations.
Voice Assistant	A tool like CallJune that lets reps speak their notes and automatically logs them into the CRM with contextual intelligence.
Prompt / Prompt Design	The specific instructions or input structure used to guide the AI's response. Well-crafted prompts ensure relevant, accurate CRM entries.
Prompt Tuning	The process of refining prompts to match a company's sales process, terminology, and use cases.
Prompt Tuning	The process of refining prompts to match a company's sales process, terminology, and use cases.
Sales Methodology Embedding	Customizing the AI to understand frameworks like MEDDIC, SPIN, or BANT — so it captures the right fields in the right language.
LLM (Large Language Model)	The core AI engine behind CallJune — trained on massive text data to understand and generate human-like language.
Vector DB (Vector Database)	A special kind of database that lets June "remember" and search context from past interactions using semantic similarity.

Dead-Letter Queue	A temporary holding place for CRM entries that failed due to technical or data validation issues.
Capture Rate	The percentage of meetings or calls where reps used June and submitted usable CRM data.
Latency	How quickly after a meeting June logs the update — critical for real-time coaching or forecasting.
Shadow Pilot	A stealth trial phase where AI is tested behind the scenes before rolling out to live reps.
AMP+B	A framework for rep adoption: Autonomy, Mastery, Purpose + Belonging — used to drive behavior change.
Self-Determination Theory (SDT)	A psychological theory of motivation concerned with supporting our natural or intrinsic tendencies to behave in effective and healthy ways.
UTAUT (Unified Theory of Acceptance and Use of Technology)	A model that explains user adoption of new technology based on factors like performance expectancy, effort expectancy, social influence, and facilitating conditions.

Footnotes & Sources

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