

DOMESTIQUE × REVLOGIC PROMPTS

AI THAT ACTUALLY WORKS IN SALES

Most AI tools create activity, not real results. This guide fixes that.

7 practical Claude workflows across the 4 core motions:

- Onboarding
- Pipeline Generation
- Deal Execution
- Sales Leadership

Start embedding AI in your revenue team now.

YOUR WORKFLOW LIBRARY

1. Motion 1: Onboarding and Ramp

- Workflow 1 — Call analysis + skill loop
 - Workflow 2 — AI-assisted territory planning
-

2. Motion 2: Pipeline Generation

- Workflow 3 — Trigger-based outreach personalization
 - Workflow 4 — 5×5 weekly prospecting motion
-

3. Motion 3: Deal Execution

- Workflow 5 — MEDDPICC live deal scorecard
-

4. Motion 4: Sales Leadership and Management

- Workflow 6 — AI-powered 1:1 prep
 - Workflow 7 — Leading-indicator dashboards
-

Motion 1: Onboarding and ramp

1 Call analysis + skill loop

Score every discovery call and coach from data, not opinion

THE PROBLEM

- Reps practice on real prospects with no safe space to fail.
- No consistent standard for what "ready" actually looks like.
- Problems are only found after the pipeline is already damaged.

THE AI SOLUTION

- Claude simulates realistic buyer persona pushback.
- Reps practice in a zero-risk environment before real calls.
- Instant debriefs on what worked and what missed.
- No one goes live until they handle the hardest buyer.

IDEAL FOR

Turning call data into coaching action. Claude amplifies Gong and Chorus with synthesis, trend analysis, and coaching agendas. No budget? Use free tools like Otter or doc exports to get 80% of the outcome at zero cost.

Step-by-step setup — first time only

STEP 1

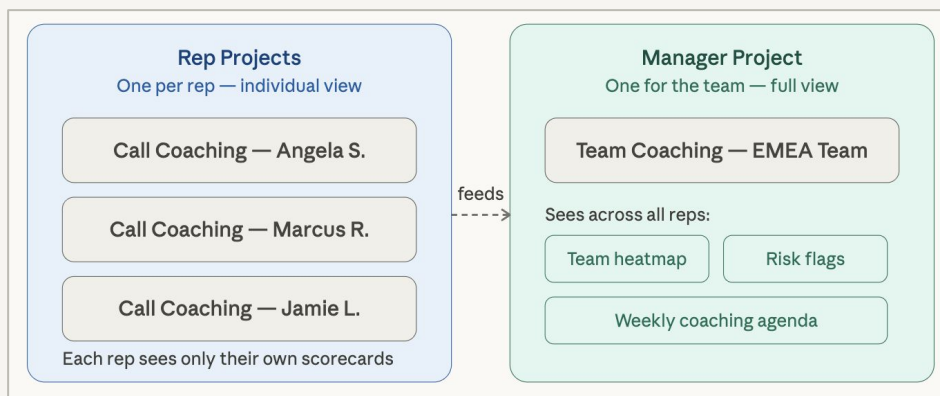
Create Claude Projects

Go to claude.ai ➔ Click "Projects" in the left sidebar ➔

For each rep: Name it "Call Coaching — [Rep Name]".

For the manager: create a separate Project named "Team Coaching — [Team Name]".

Reps work in their own Project and see only their own scorecards and coaching history. The manager works in theirs and sees the full team heatmap, risk flags, and coaching agenda.



Motion 1: Onboarding and ramp

1 Call analysis + skill loop

STEP 2

Add the prompt as Project instructions

For each rep:

"You are an expert sales coach. Analyze call transcripts or summaries I provide from [Gong / Chorus / Otter.ai / notes] and score the rep on four dimensions:

1. Discovery depth — did they uncover business impact, not just pain?
2. Value articulation — did they connect capabilities to outcomes?
3. Objection handling — did they acknowledge, isolate, and respond?
4. Talk ratio — was the prospect talking more than 50% of the time?

For each: score 1–5, one direct quote from the transcript as evidence, one coaching recommendation.

End with: one coaching focus for this week, one 2-minute practice drill, overall score out of 5.

Output as a visual HTML scorecard showing: rep name, call date, week of ramp. Color-coded score bars (green 4–5, amber 3, red 1–2) with evidence and recommendation per dimension. Coaching focus in a highlighted box with the drill. Trend indicator per dimension (improving, stable, declining) based on last 3 saved scorecards.

For self-coaching questions like 'What is my biggest gap?' or 'What should I focus on next?' — read across all saved scorecards in this Project and answer directly."

For the manager:

"You are an expert sales coaching manager. I will give you call scorecards and summaries from my team generated from [Gong / Chorus / Otter.ai / rep notes]. Read across all of them and generate a visual HTML team heatmap showing: rep name, week of ramp, scores for all four dimensions with color-coded cells (green 4–5, amber 3, red 1–2), trend arrow per dimension (up, flat, down), pipeline value, and status badge (on track, watch, at risk).

Below the heatmap generate a risk flags section identifying: any rep with two or more declining dimensions this week, any rep whose skill trend is negatively correlated with their pipeline movement, any deal at risk based on recent call quality, and the one rep who needs the most attention before Monday.

End with a coaching agenda — one specific coaching focus per rep for this week's 1:1s, and one team-wide coaching exercise for Monday's huddle based on the most common skill gap across the team.

Once a month when I share top-performing scorecards, recalibrate the scoring thresholds and update what good looks like for each dimension."

PRO TIP: Claude varies designs by default. To ensure team-wide consistency, add this: "Use this HTML template. Populate with data; do not alter layout or colors: [Paste HTML]."

Motion 1: Onboarding and ramp

1 Call analysis + skill loop

STEP 3 Connect your tool

Gong/Chorus: Admin connects via API for 100% automated, zero-touch syncing.
Otter.ai: Upload transcripts manually or use Zapier to push them automatically.
No tools, export your rough notes!

STEP 4 Get Scorecard

Open the rep's Project and ask: "Score this call." Claude generates the full visual HTML scorecard instantly. Reps can also ask anytime: "What is my biggest gap over the last 4 weeks?"

STEP 5 Save every Scorecard

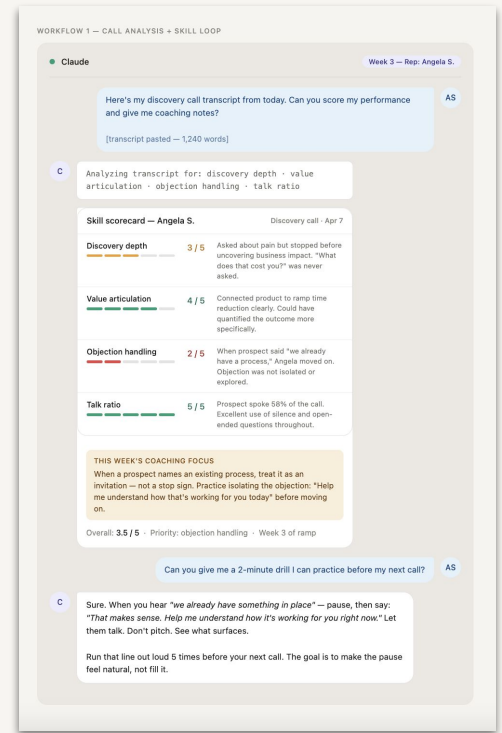
Use this format: **Angela S. · Week 4 · Apr 7**
 This lets Claude track trends automatically from week 2 onward.

At any point the rep can open their Project and ask:

- "What is my biggest skill gap over the last 4 weeks?"
- "How have my objection handling scores changed since week 1?"
- "Write me a pre-call checklist based on my most common misses."
- "What should I focus on before my next call?"
- "What patterns does my manager keep coaching me on?"

STEP 6 Manager layer (every Friday)

Open the Manager Project and ask: "Generate this week's team heatmap and my coaching agenda for Monday." Drill deeper anytime: "What is the pattern in Angela's misses over the last 4 weeks?"



REP SKILL HEATMAP — THIS WEEK'S SCORES

Rep	Discovery	Value art.	Objections	Talk ratio	Trend	Pipeline	Status
AS Angela S. Wk 4	2.8	4.1	3.0	4.5	↓ 0.3	\$86k	Watch
MR Marcus R. Wk 4	2.0	2.5	1.8	3.2	↓ 0.6	\$52k	At risk
JL Jamie L. Wk 6	4.8	4.6	4.2	4.9	↑ 0.5	\$98k	On track
DK Dana K. Wk 5	3.4	3.1	4.0	3.6	↑ 0.2	\$54k	On track
TN Tyler N. Wk 2	3.0	2.8	2.6	3.5	→ 0.0	\$22k	Watch

RISK FLAGS THIS WEEK

- **Marcus R.** — scores declining 2 weeks in row across all dimensions. Recommend t1 focused on discovery before next call.
- **Meridian Inc. (Angela)** — Stage 3, 22 days, no economic buyer contact. Deal at risk of stalling.
- **Tyler N.** — Week 2, no improvement in value articulation. May need additional simulation reps before live territory.
- **Jamie L.** — Strongest performer this week. Consider pairing with Marcus for peer coaching.

PRO TIP: You do not need to paste anything. All scorecards are already saved inside the Project. Claude has access to all of them and can answer questions across the full team at any time.

Motion 1: Onboarding and ramp

2 AI-assisted territory planning

Stop targeting who should buy; start targeting who actually buys.

THE PROBLEM

- Reps start each week with a flat list of accounts and no idea where to begin
- Territory prioritization is based on gut feel, not data — reps work familiar accounts, not the right ones
- Every rep builds their own research process — inconsistent, slow, and not repeatable

THE AI SOLUTION

- Claude ranks your account list by ICP and win patterns in under 90 seconds.
- Get fit scores, trigger events, target personas, and researched opening angles for every account.

IDEAL FOR

New reps and their managers. If you have Salesforce or HubSpot connected, Claude pulls live account data the moment you ask.

Step-by-step setup — first time only

STEP 1

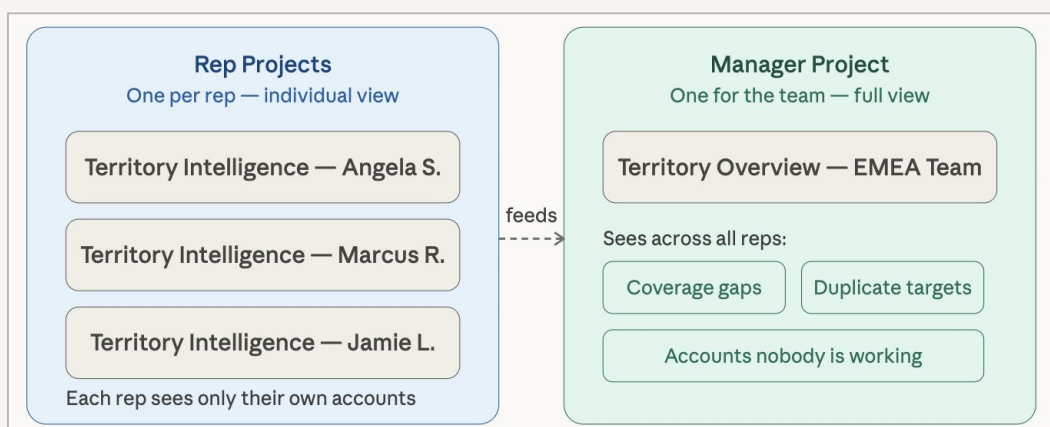
Create Claude Projects

Go to claude.ai ➤ Click "Projects" in the left sidebar ➤

For each rep: Name it "Territory Intelligence — [Rep Name]" .

For the manager: create a separate Project named "Territory Overview — [Team Name]" .

Reps see only their own ranked accounts. The manager sees the full team — coverage gaps, duplicate targeting, and accounts nobody is working.



Motion 1: Onboarding and ramp

2 AI-assisted territory planning

STEP 2

Add the prompt as Project instructions

For each rep:

""You are an expert territory planning assistant connected to [Salesforce / HubSpot] via API. When I ask, pull all accounts where account owner = [Rep Name]. Include company name, size, industry, intent score, last activity, and trigger event fields.

For each account: score ICP fit from 1–10, assign a tier (Tier 1 — act this week, Tier 2 — monitor, Tier 3 — low priority), identify the most relevant trigger event using your own knowledge if one isn't available, recommend the best persona to target and why, suggest one research question before outreach, and write a one-to-two sentence opening angle that leads with a business observation — not a product pitch.

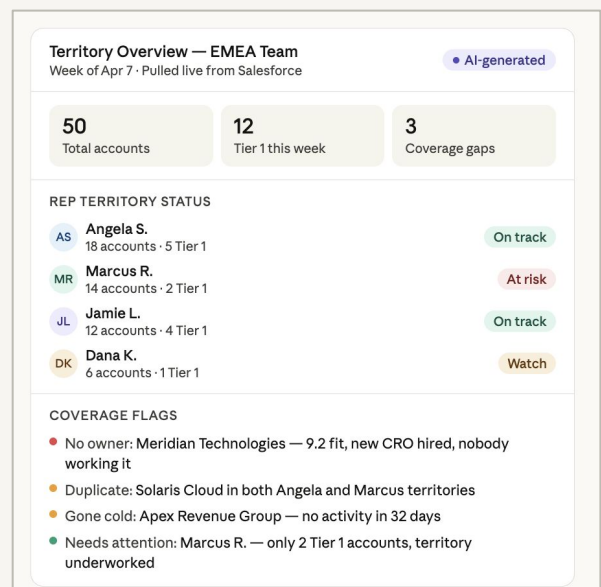
Output as a visual HTML dashboard. Start with a summary header: total accounts analyzed, focus accounts this week, active trigger events, time to generate. Show a tier legend. Then display tiered account cards ranked by urgency, starting with the top 5 Tier 1 accounts. Each card: company name, size, industry, funding stage in the header; ICP fit score with a color-coded bar; a trigger event badge; and four labeled sections — Trigger Event, Target Persona, Research Question, Suggested Opening Angle. Green left border for Tier 1, amber for Tier 2, gray for Tier 3. End with a manager note flagging uncovered high-fit accounts, duplicate targeting, and accounts at risk of going cold."

For the manager:

""You are an expert territory planning assistant connected to [Salesforce / HubSpot] via API. When I ask, pull all accounts across the full team with no territory filter. Group by account owner.

Apply the same scoring as individual rep plans: ICP fit 1–10, tier assignment, trigger event identification, persona recommendation, and opening angle.

Output as a visual HTML dashboard. Start with a team summary: total accounts across all reps, total Tier 1 accounts this week, active trigger events, and number of reps with a complete top 5. Show each rep's top 5 Tier 1 accounts grouped by rep name. End with a manager intelligence section flagging: high-fit accounts with no owner, accounts in more than one rep's territory, accounts with no activity in 30 days, and the one rep whose territory needs the most attention this week and why."



Motion 1: Onboarding and ramp

2 AI-assisted territory planning

STEP 3

Connect your CRM

CRM (Salesforce/HubSpot): One-time API setup.. Data pulls live whenever a human asks a question.

No CRM: Export your territory list as a file. Claude fills in the gaps and flags exactly what to research.

STEP 4

Get your ranked plan

The rep opens their Project and asks:

"Rank my territory and give me my top 5 focus accounts for this week."

Claude pulls live from the CRM at that moment, scores every account, and generates the full visual HTML dashboard instantly.

STEP 5

Manager layer (every Friday)

The manager opens the Manager Project and asks:

"Generate this week's team territory dashboard and flag any coverage gaps, duplicate targeting, and accounts at risk of going cold."

Claude reads live from the CRM across all reps and produces the full consolidated dashboard instantly. The manager asks — Claude does the rest.

Territory plan — Angela S. - Week 4 AI-generated
 Ranked by ICP fit, intent signals, and trigger events - Generated by Claude

50 Accounts analyzed	5 Focus accounts this week	3 Active trigger events	~90s Time to generate
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■ Tier 1 — act this week
 ■ Tier 2 — monitor
 ■ Tier 3 — low priority

1 Meridian Technologies SaaS · 320 employees · Series B 9.2 fit New CRO hired	TRIGGER EVENT New CRO started 3 weeks ago Sarah Chen from Salesforce — known for rebuilding enablement from scratch in first 90 days	TARGET PERSONA Sarah Chen, CRO Likely evaluating current stack — decision window open now	RESEARCH QUESTION BEFORE OUTREACH What did she change in her first 90 days at Salesforce? What is her public take on rep ramp?
SUGGESTED OPENING ANGLE <i>"Most CROs in your position spend the first 90 days diagnosing ramp — we've been talking to a few who found the issue wasn't training content, it was no visibility into what reps actually do on calls."</i>			
2 Apex Revenue Group RevOps consulting · 180 employees · PE-backed 8.7 fit Series A closed	TRIGGER EVENT \$12M Series A closed 6 weeks ago Headcount plan includes 4 new AEs — scaling sales team for first time	TARGET PERSONA James Park, VP Sales First-time VP — building the playbook from scratch, no inherited process	RESEARCH QUESTION BEFORE OUTREACH Has James posted anything about building his sales team? Any recent LinkedIn activity on onboarding or ramp?
SUGGESTED OPENING ANGLE <i>"When you're bringing on four AEs at once, the biggest risk isn't hiring — it's that they all ramp differently and you don't find out until 90 days in. Worth a 20-minute conversation?"</i>			
3 Solaris Cloud Infrastructure SaaS · 540 employees · Public 8.1 fit 12 SDR roles open	TRIGGER EVENT 12 SDR and AE roles posted in 30 days Signal: scaling sales capacity aggressively — ramp time and enablement become critical	TARGET PERSONA Nina Torres, Head of Sales Enablement Likely under pressure to onboard new hires fast — will feel the ramp problem directly	RESEARCH QUESTION BEFORE OUTREACH Does Solaris have a published ramp time or onboarding philosophy? Any recent earnings mentions of sales productivity?
SUGGESTED OPENING ANGLE <i>"When you're onboarding 12 reps at once, the enablement team usually becomes the bottleneck — not because of the content, but because there's no way to know which reps are actually ready."</i>			
4 Northgate Ventures VC-backed SaaS · 95 employees · Seed+ 6.4 fit Expansion signal	TRIGGER EVENT Moving upmarket — new enterprise page on website PLG to sales-led transition underway, likely hiring first AEs soon	TARGET PERSONA CEO or Head of Revenue Early-stage — decisions made at the top, no dedicated enablement yet	RESEARCH QUESTION BEFORE OUTREACH Who owns sales at Northgate today? Has the CEO posted about the move to enterprise or hiring sales reps?
SUGGESTED OPENING ANGLE <i>"The move from PLG to sales-led is one of the hardest transitions — the first few AEs you hire define the playbook. Worth making sure they ramp on data, not guesswork."</i>			
5 Brightfield Analytics Data & BI SaaS · 210 employees · Series B 5.9 fit High intent signal	TRIGGER EVENT High intent score from G2 and review activity 3 employees viewed sales enablement category pages in last 14 days	TARGET PERSONA VP Sales Operations Likely evaluating tools — active research mode, receptive to outreach now	RESEARCH QUESTION BEFORE OUTREACH What tools does Brightfield currently use for sales enablement? Any public stack mentions on LinkedIn or their tech blog?
SUGGESTED OPENING ANGLE <i>"Your team has been researching this category — wanted to reach out before you get too deep into demos. Happy to share what companies at your stage usually find when they look at this problem."</i>			

PRO TIP: Rank against wins, share your last 5 closed-won deals and ask: "What patterns do you see in these wins? Use them as my scoring baseline."

Motion 2: Pipeline generation

3 Trigger-based outreach personalization

Stop writing generic messages. Start opening with what's actually happening at the account.

THE PROBLEM

- Reps send the same sequence to every title. A VP of Sales and a CFO get the same email with the name swapped.
- The message doesn't connect to what that person actually cares about.
- Outreach volume goes up, response rate goes down, and no one knows why.

THE AI SOLUTION

- Claude takes the contact's role and company context, connects it to role-specific business outcomes, and drafts outreach that opens with a relevant business observation — not a product pitch — and ends with a low-friction ask.

IDEAL FOR

SDRs./Sales reps who want to stop generic outreach and start opening with what is actually happening at the account. Claude finds the trigger, builds the sequence, and pushes email touches to your sequencing tool.

Step-by-step setup — first time only

STEP 1

Create a Claude Project

Go to claude.ai ➔ Click "Projects" in the left sidebar ➔ "New Project". Name it "Outreach Engine — [Your Name or Team]". All sequences, trigger events, and persona notes live here permanently.

STEP 2

Set up your voice

Open the Project and paste your two best-performing emails. Tell Claude your communication style in three words. Claude mirrors this in every sequence it writes for you — this is what stops every rep on the team from sounding identical.

STEP 3

Add the prompt as Project instructions

"You are an expert B2B outreach strategist writing in my voice. When I give you a target account: search Google News, the company's press page, and public LinkedIn posts for real trigger events — funding rounds, leadership changes, new hires, product launches, earnings mentions. Identify the two strongest signals for the persona I am targeting. If no strong signal exists tell me before writing anything..."

Motion 2: Pipeline Generation

3 Trigger-based outreach personalization

...Then build a 5-touch sequence across email and LinkedIn. Lead every touch with a business observation tied to the trigger — not a product pitch. Thread the trigger through all five touches not just the opener. Fifth touch is always a breakup. Format: Day / Channel / Subject or opening line / Key message 2–3 sentences / Ask.

After generating ask: is there anything you know that I don't — a relationship, a past conversation, a product detail? Adjust only those."

STEP 4

Connect your tools

HubSpot or Salesforce via MCP — Claude reads prior contact history before writing so it never repeats a past touch

HubSpot Sequences, **Outreach**, or **Salesloft** via MCP or **Zapier** — email touches push automatically into your sequencing tool once approved

Web search — built into Claude natively, no setup needed

STEP 5

Find your trigger

Open the Project and ask:

"Search for trigger events at [Company Name] in the last 90 days. I am targeting the [persona title]. What are the two strongest signals and why do they matter to this persona?"

Claude searches live and surfaces the best angles before writing anything. No strong trigger? Move to the next account.

SELECTED CONTACT

QP **Quentin Packard**
VP of Sales · Cockroach Labs Lead

Email: q.packard@cockroachlabs.com

Company: Cockroach Labs · ~700 employees · \$5B valuation

Industry: Infrastructure SaaS · Distributed SQL

Prior contact: None — fully cold

CRM link: View in HubSpot ↗

WHY THIS CONTACT

Company size	Total raised	Valuation
~700 employees	\$633M Series F · 2021	\$5B private · 2021

TRIGGER EVENTS

GTM complexity

Multi-segment hiring spike
Actively recruiting AEs for West US (Digital Natives), UK, and a Partner Sales Manager for the IBM OEM channel — plus a Sales Commissions Manager. Three distinct GTM motions running simultaneously, each needing different skills and playbooks.

New channel

IBM OEM partnership launched (Oct 2025)
New overlay motion, new partner-influenced deal flow, new comp complexity. Classic "whose deal is this?" phase — reps and managers are still figuring out the rules of engagement.

PRO TIP: No trigger, no sequence: A weak signal produces a weak email. Ask Claude to search before you paste account details.

Motion 2: Pipeline Generation

3 Trigger-based outreach personalization

STEP 6

Generate the sequence

In the same chat paste: "Company: [Name]. Size: [employees]. Industry: [sector]. Persona: [title and core concern]. Generate the sequence."

Full 5-touch sequence in under 90 seconds

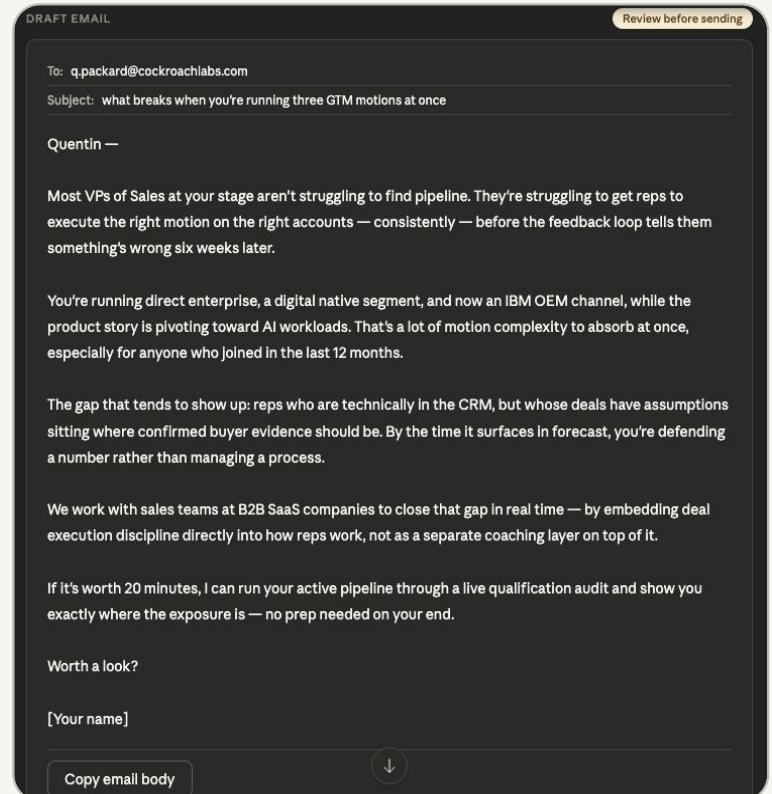
STEP 7

Review, push, and send

Read once. Adjust only what Claude cannot know. Then ask:

"Does anything here sound generic? Fix it."

With integrations, email touches push to your sequencing tool automatically. For LinkedIn touches, just copy, paste, and send on the specified day.



STEP 8

Close the feedback loop

After the sequence runs paste results back:

"Touch 1 opened no reply. Touch 2 no open. Touch 3 got a reply. What do I adjust?"

Claude rewrites remaining touches based on what worked. Gets sharper every week.

PRO TIP: Batch by persona. Run the first sequence in full then ask: "Adapt this for [next company] — same angle, same voice, what changes?"

PRO TIP: Most reps personalize touch one and go generic after that. Claude threads the trigger through all five, but only if the trigger is specific enough. Vague input breaks the thread.

Motion 2: Pipeline generation

4 5×5 weekly prospecting motion

Stop working accounts. Start working stakeholders.

THE PROBLEM

- Reps spread across 30+ accounts and go shallow on all of them. Activity goes up, pipeline quality goes down.
- Message count becomes the metric instead of account movement.
- Single-threaded accounts stall the moment one contact goes quiet.

THE AI SOLUTION

- Claude identifies your top 5 accounts for the week, maps 5 contacts per account across functions, and shows you which accounts actually progressed — not how many touches were logged.

Step-by-step setup — first time only

STEP 1

Create a Claude Project

Go to claude.ai ➤ Click "Projects" in the left sidebar ➤ "New Project. Name it "Prospecting assistant — [Your Name or Team]". Your weekly priority accounts and prospects live here.

STEP 2

Add your prospecting instructions as Project instructions

- Inside the Project, click "Set instructions". Paste this prompt in:

"You are an expert B2B prospecting strategist. When I give you a list of accounts, prioritize them in order of fit for outbound and identify 5 contacts per account across at least 2 different functions (e.g., Sales/RevOps, Enablement/Finance, Executive). For each contact, suggest: the function they represent, their likely title, the business concern most relevant to their role, and a one-sentence first-touch message tailored to their perspective — not a generic pitch. Flag any accounts where a key function is unrepresented. Format as a weekly prospecting map by account."

STEP 3

Pull your 5 focus accounts

Upload your account list and have Claude help you identify your top 5 accounts for the week based on fit. Include company name, size, any trigger events, and the contacts you already know.

STEP 4

Create your org map

Ask Claude to create an org map for your top accounts and ask for a full contact map with function coverage, suggested personas, and first-touch angles for each.

STEP 5

Identify the gaps

Review the map. For any function marked as unrepresented, spend 5 minutes on LinkedIn to confirm fit. Once fit is confirmed work with Claude to generate their first-touch.

Motion 2: Pipeline Generation

4 5x5 weekly prospecting motion

STEP 6 Execute by function

Don't work one account at a time. Work one function across all 5 accounts. All the VP Sales messages Monday, all RevOps Tuesday, all Enablement Wednesday. Your messaging stays sharper when you're in the same persona's headspace back to back.

STEP 7 Update the 5x5 throughout the week

When someone replies, books, or goes dark, tell Claude. "James Park at Apex replied, what's the next move for the other 4 contacts at this account?" Claude reads the full map, adjusts priority, and flags any account that just became single-threaded.

5x5 prospecting map

Week of Apr 14, 2026 · Click an account to see who to target

5 Focus accounts	21 Contacts mapped	4 Function gaps	76% Coverage health
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Apex Revenue Group
Mid-market · SaaS · 320 employees

New CRO needs pipeline visibility fast — entire revenue org is being re-evaluated. Window to become the infrastructure vendor before they build internally. 5/5

New CRO hired 3 weeks ago

RedShift Software 1 gap
Enterprise · DevTools · 1,200 employees

Post-funding mandate to double the sales team. They need process and tooling before the next cohort starts — urgency is real and budget is approved. 4/5

Series D closed (\$85M) — Feb 2026

Clutch Health 1 gap
Mid-market · HealthTech · 480 employees

Building outbound from zero. VP Sales is publicly hiring which means budget exists and timeline is now. First-mover advantage before they pick a competitor. 4/5

VP Sales hiring SDRs — LinkedIn post

Staybridge Logistics 2 gaps
Enterprise · Supply Chain · 2,100 employees

Public earnings miss creates internal pressure to fix pipeline. Sales leadership is under scrutiny — they need wins fast and can justify spend against the miss. 3/5

Q1 earnings miss — revenue growth flat YoY

↓

Apex Revenue Group

Mid-market · SaaS · 320 employees

New CRO is rebuilding the revenue org — 4 sales roles posted in the last 10 days and old VP Sales is gone from LinkedIn. They're making decisions on process and tooling right now. 5/5 ^

New CRO hired 3 weeks ago

James Park
CRO

Sales

Just changed title to CRO on LinkedIn 3 weeks ago. Posted about 'building a revenue engine that actually scales.'
LinkedIn

Replied

Sarah Chen
VP of Sales

Sales

Promoted from Director last month. Team page shows 2 open AE roles and 1 SDR role under her.
LinkedIn + careers page

Engaged

Marco Rivera
Director of RevOps

RevOps

Job listing for RevOps Analyst mentions 'migrating from Salesforce to HubSpot' and 'building reporting from scratch.'
Job posting

New

Lisa Okoro
Sales Enablement Lead

Enablement

Commented on a post about onboarding frameworks — said they're 'starting from zero with a new team.'
LinkedIn activity

New

Devon Harris
Head of Growth

Growth

Shared a blog post about outbound + PLG working together. Company just launched a free tier last quarter.
LinkedIn + company blog

New

PRO TIP: The 5x5 is a coverage map, not a contact list. The goal isn't to reach 25 people, it's to have at create personalized conversations with each prospect at your target accounts so one person going dark never kills your deal. Claude flags which accounts are dangerously thin before it's too late.

RedShift Software 1 gap

Enterprise · DevTools · 1,200 employees

\$85M in fresh capital with a press release saying 'aggressive go-to-market expansion.' Job board has 12 open sales roles. Money is moving now. 4/5 ^

Series D (\$85M) closed Feb 2026

Amanda Foster
VP of Sales

Sales

LinkedIn shows team grew from 18 to 31 reps in 6 months. Posted last week about 'the hardest part of scaling is keeping quality.'
LinkedIn

Engaged

Ryan Tse
CRO

Sales

Quoted in the Series D press release saying 'we're doubling the GTM team by Q4.' Board deck language.
Press release

New

Nina Patel
Head of RevOps

RevOps

Job listing for RevOps Manager says 'own the CRM migration and build forecasting infrastructure.'
Job posting

Replied

Jason Holt
Director of Enablement

Enablement

Posted about needing 'a real onboarding program before the next cohort starts in May.'
LinkedIn

New

TBD
Growth contact needed

Growth

No growth or demand gen leader identified — likely reporting into CRO directly.
Gap

Gap

Motion 3: Deal execution

5 MEDDPICC live deal scorecard

Stop guessing where your deal stands. Start knowing.

THE PROBLEM

- Qualification happens once at discovery and never gets updated. By stage 3, half the fields are blank or outdated.
- Deals advance on optimism, not evidence.
- Managers find the gaps at the deal review — not before it.

THE AI SOLUTION

- Claude pulls deal notes, CRM fields, and email history, then scores every MEDDPICC element as Confirmed, Assumed, or Missing — and tells you what to fix before your next review.

IDEAL FOR

Reps and managers who want to stop guessing where a deal stands and start knowing. Claude pulls live data from your CRM and Gong, scores every MEDDPICC element automatically, flags what is missing before the pipeline review, and updates the scorecard every week without the rep rebuilding anything from scratch.

STEP 1

Create a Claude Project

Go to claude.ai ➤ Click "Projects" in the left sidebar ➤ New Project. Name it "Deal Reviews — [Your Name or Team]". All scored deals and coaching notes live here.

STEP 2

Connect your tools

Primary sources:

- Salesforce or HubSpot — Claude pulls deal stage, value, close date, contact names, and activity history automatically. No manual export, no copy-paste.
- Gong or Chorus — Claude reads call transcripts and meeting summaries directly. No rep notes required.
- Gmail — Claude reads the last 3–5 email threads with the buyer so it can distinguish Confirmed from Assumed based on what the buyer actually said versus what the rep believes.

No tools connected yet? Export the CRM deal record, copy the last 3–5 email threads, and paste call notes manually. Same output — more steps. Still worth doing on day one.

Motion 3: Deal execution

5 MEDDPICC live deal scorecard

STEP 3

Add the prompt as Project instructions

"You are an expert B2B sales coach specializing in MEDDPICC deal qualification. When I give you a deal or ask you to pull one from the CRM, score each of the 7 MEDDPICC elements — Metrics, Economic Buyer, Decision Criteria, Decision Process, Identify Pain, Champion, Competition — as one of three statuses:

Confirmed — the buyer has explicitly stated it in an email, call, or document. Assumed — the rep believes it but the buyer has not confirmed it. Missing — no evidence exists.

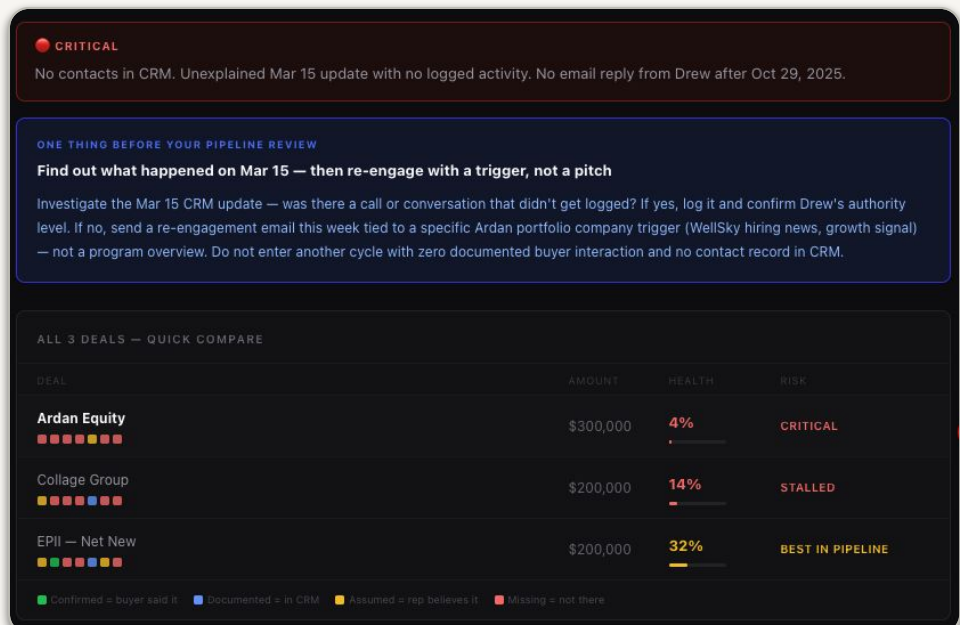
For each element include the specific evidence or note exactly what is absent. End with: the top 2 qualification gaps, one concrete action per gap the rep should take before the next buyer conversation, and an overall deal health score from 1–7.

Then add a Critical Flags section — pull from CRM activity data, email history, and call logs to flag anything that does not show up in the MEDDPICC score: unexplained gaps in activity, contacts who have gone silent, stage advances with no logged buyer interaction, or anything that suggests the deal is advancing on optimism rather than evidence.

End with one sentence: the single most important thing the rep should do before the next pipeline review.

Output as a visual HTML scorecard. Color code: green for Confirmed, amber for Assumed, red for Missing. Show the overall health score prominently. Include a quick compare section at the bottom showing all active deals for this rep ranked by health score.

When I say 'here is what changed this week on [deal]' — read the existing scorecard and edit it. Do not rebuild from scratch."



Motion 3: Deal execution

5 MEDDPICC live deal scorecard

STEP 4

Score any deal

The rep opens the Project and asks:

"Pull the deal data for [Deal Name] from the CRM and score it."

Claude connects to Salesforce or HubSpot live, reads the deal record, pulls the last email threads from Gmail, reads the most recent call transcript from Gong, and generates the full MEDDPICC scorecard automatically. No export, no paste, no prep.

If tools are not yet connected the rep pastes:

- CRM deal record — stage, value, close date, contact names
- Last 3–5 email threads with the buyer
- Any call notes

Same scorecard. Manual input.

STEP 5

Update it every week

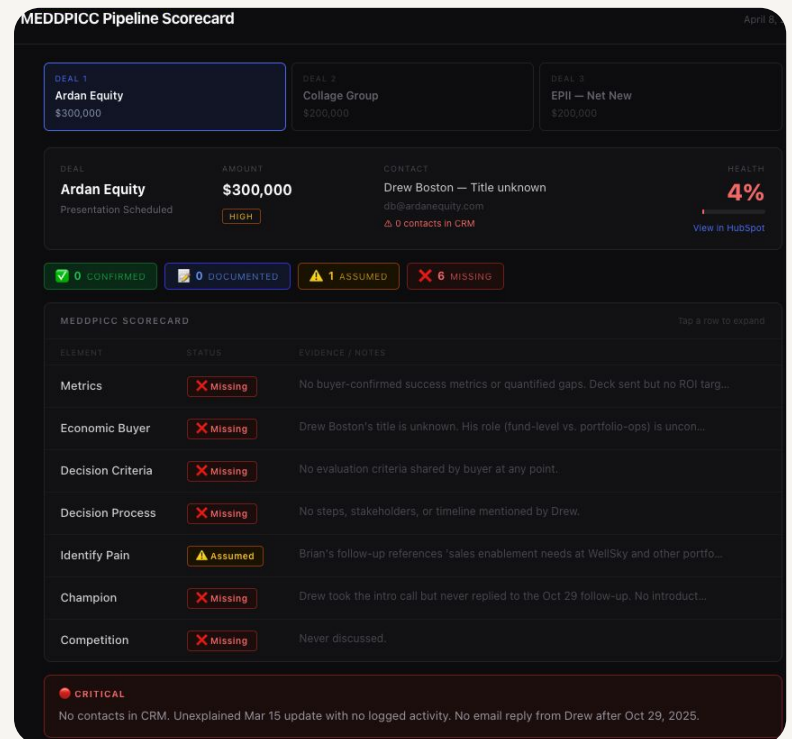
Update it every week Every time a milestone moves, a new stakeholder appears, or the timeline shifts the rep opens the Project and says:

"Here is what changed this week on [Deal Name]: [paste what happened]. Update the scorecard and flag any new risks."

Claude reads the existing scorecard and edits it — no rebuilding from scratch. The health score adjusts, new gaps surface, and the critical flags section updates based on the latest activity data.

If CRM and Gong are connected the rep can simply ask: "Check for updates on [Deal Name] since last week and refresh the scorecard."

Claude pulls the latest data live and updates automatically.



Motion 3: Deal execution

5 MEDDPICC live deal scorecard

STEP 6

Manager pipeline review

Before every pipeline review the manager opens the Project and asks:

"Generate a pipeline review agenda for my team. Rank all active deals by health score and give me the one question I should ask about each deal in the bottom half."

Claude reads all active deal scorecards across the team, ranks them by health score, identifies the deals advancing on optimism rather than evidence, and generates a focused agenda — the three deals that need the most attention and the specific question for each one.

The manager walks into the pipeline review already knowing which deals are at risk and exactly where the gaps are. No surprises.

Deal	MEDDPICC coverage	Amount	Score	Status
Ardan Equity	■ ■ ■ ■ ■	\$300k	2/7	Critical
Collage Group	■ ■ ■ ■ ■	\$200k	4/7	Stalled
EPII — Net New	■ ■ ■ ■ ■	\$200k	6/7	Best in pipeline

■ Confirmed — buyer stated
 ■ Assumed — rep believes
 ■ Missing — no evidence

STEP 7

Act on the critical flag

Every scorecard ends with one sentence — the single most important thing to do before the next pipeline review. This is not a summary of the gaps. It is a specific action tied to the most dangerous risk in the deal right now.

The rep reads it, does it, and pastes the result back:

"I followed up on the economic buyer question — here is what came back: [paste]. Update the scorecard."

Claude updates the relevant element from Missing or Assumed to Confirmed if the evidence supports it — and adjusts the health score accordingly.

PRO TIP: Want it fully automatic? Set up a weekly recurring prompt via Zapier that fires every Monday morning, pulls all active deals from the CRM, refreshes every scorecard, and delivers a team-wide health summary to the manager's Slack. Optional — but removes the last manual step entirely.

Motion 4: Sales leadership and management

6 AI-powered 1:1 prep

Score every discovery call and coach from data, not opinion

THE PROBLEM

- Sales managers spend more time chasing data than coaching.
- Call scores, pipeline health, and rep trends live in separate tools with no unified view before a 1:1
- Coaching quality becomes a function of manager bandwidth

THE AI SOLUTION

- AI reads call scores, pipeline snapshots, and manager notes and surfaces a structured brief.
- Coaching becomes consistent and repeatable across every rep, every week

IDEAL FOR

Frontline sales managers who want a complete view of each rep's performance delivered before every 1:1.

Step-by-step setup — first time only

STEP 1

Create Claude Project

Go to claude.ai ➤ Click "Projects" in the left sidebar ➤ For the manager: name it "Sales Leadership — [Team Name]". This is the permanent home for all rep dashboards.

STEP 2

Connect your tools

In Claude settings, connect via MCP connectors — one-time setup:

- Salesforce or HubSpot — quota, pipeline, deal values, and opportunity data per rep
- Gong or Chorus — action items from call recordings and coaching observations
- Asana — tasks assigned per rep with completion status and due dates
- Google Calendar — scheduled 1:1s so the automation knows when to trigger
- Gmail — email threads where the manager is CC'd per rep

Motion 4: Sales leadership and management

6 AI-powered 1:1 prep

STEP 3

Add the prompt as Project instructions

"You are an expert sales performance assistant for a sales manager. When I ask for a rep's monthly dashboard, pull the following from connected tools: quota attainment, closed won value and deal count, and monthly trend vs prior month from [Salesforce / HubSpot]; pipeline by stage with deal count, total value, and trend arrow vs prior month from [Salesforce / HubSpot]; top 5 opportunities with client name, stage, days in stage, deal value, and risk status from [Salesforce / HubSpot]; action items from Gong call recordings, Asana tasks, and Gmail threads where the manager is CC'd — including source, due date, and completion status per item.

Generate a visual HTML dashboard with five sections in this exact order:

1. Quota attainment — monthly quota, closed amount, percentage attained, amount still needed, days remaining, progress bar showing actual vs on-pace, sparkline showing last 4 months, month-over-month comparison, and a projected close forecast based on pipeline health and stage velocity.
2. Month summary — three metric cards with current value and month-over-month trend: closed won, total pipeline with coverage ratio, deals at risk with names.
3. Pipeline by stage — horizontal bar per stage with deal count, total value, and trend arrow. Stages: Prospect, Discovery, Proposal, Commit, Closed Won.
4. Top opportunities — ranked top 5: client name, stage, days in stage, deal value, and status badge (At risk / On track / Gone dark / New / Closing).
5. Action items to review — sorted overdue first, then pending, then done. Each item shows task title, source badge (Gong / Asana / Email), due date, and status. Include a completion rate summary at the top. Color-code: red border for overdue, amber for pending, green for done.

When I ask for a team summary, generate a one-line status per rep showing quota attainment, biggest deal at risk, and one outstanding action item — formatted as a scannable table."

STEP 4

Get the dashboard before every 1:1

The manager opens the Project and asks: "Generate the monthly dashboard for [Rep Name]."

Claude pulls live from all connected tools and generates the full visual dashboard in seconds. Read it in 3 minutes. Walk in ready.

To navigate across the full team ask:

- "Generate the monthly dashboard for Marcus R."
- "Generate the monthly dashboard for Jamie L."

Same Project, different rep, fresh data each time.

Motion 4: Sales leadership and management

6 AI-powered 1:1 prep

STEP 5

Start every week with the team summary

Every Monday morning open the Project and ask: "Give me a one-line status for each rep on my team this week."

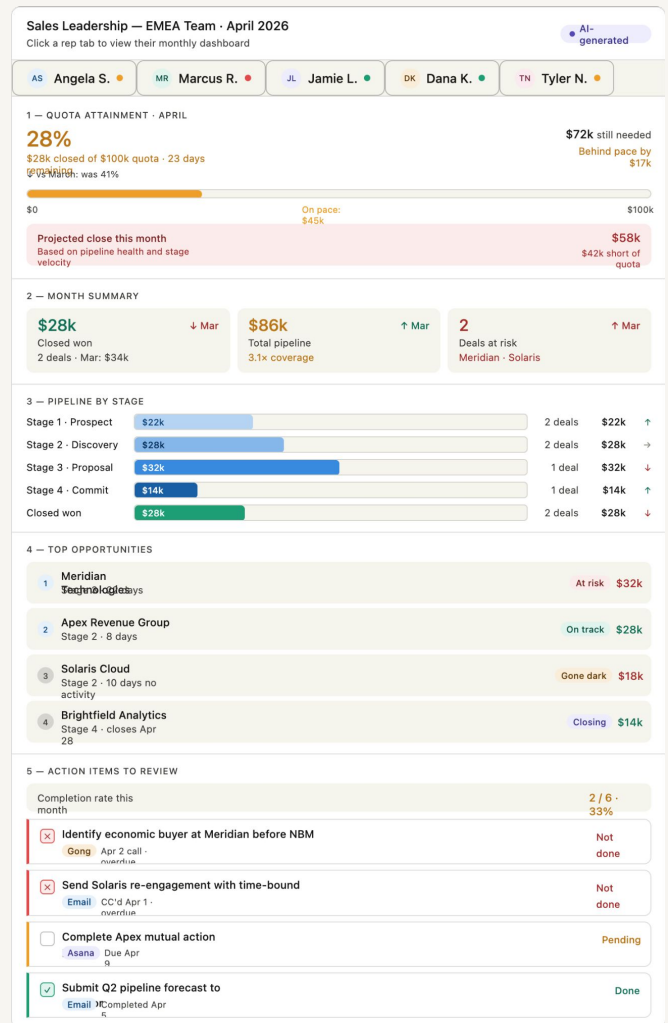
Claude returns a scannable table — quota attainment, biggest deal at risk, and one outstanding action item per rep. Identify who needs the most attention before opening a single full dashboard.

Questions to ask during and after every 1:1:

- "Is [Rep Name] projected to hit quota this month? What is the single biggest risk to their number?"
- "Based on today's conversation, what should I focus on with [Rep Name] next week?"
- "Which rep on my team is most at risk of missing quota this month and why?"
- "[Rep Name] says the Solaris deal is still alive — based on the activity data, do you agree?"

Weekly team view:

- "Which rep has the highest action item completion rate this month?"
- "Who should I spend the most coaching time with this week based on pipeline and activity data?"
- "Which rep has the highest action item completion rate this month?"



PRO TIP: After every 1:1 ask Claude to summarize the commitments and create Asana tasks. Want it fully automatic? Set up a Zapier workflow that monitors Google Calendar for scheduled 1:1s, fires 30 minutes before each one, triggers the dashboard prompt, and delivers the output to your Slack DM.

Motion 4: Sales leadership and management

7 Leading-indicator dashboards

Start leading from data. See across every team, every deal, and every risk.

THE PROBLEM

- By the time a pipeline gap shows up in the forecast, it's too late to fix it. Managers have no consistent view of early and mid-stage deal health week over week
- Without leading indicators, coaching conversations happen after the miss, not before

THE AI SOLUTION

AI analyzes pipeline creation, deal stage health, and activity recency to produce a team dashboard. Managers shift from lagging indicator reviews to proactive pipeline intervention.

IDEAL FOR

This is a VP or CRO-level revenue intelligence dashboard. It operates one level above everything we've built. It looks across multiple teams, multiple managers, and the entire quarter's pipeline health simultaneously.

Step-by-step setup — first time only

STEP 1

Add the prompt as a Project instruction

Go to claude.ai ➤ Click "Projects" in the left sidebar ➤ New Project. Name it "Revenue Intelligence — [Company Name] Q[X]". This is the CRO's permanent command center.

STEP 2

Connect your tools

Integrate your CRM (Salesforce or HubSpot): Once done, Claude gets live access to all pipeline data.

Every time the CRO asks for the dashboard Claude pulls the latest state of the CRM at that exact moment.

Optional: Connect Gong or Chorus. (This adds call activity and rep engagement data for better alerts. Not required.)

Motion 4: Sales leadership and management

7 Leading-indicator dashboards

STEP 3

Add the prompt as Project instructions

"You are a revenue intelligence analyst connected to [Salesforce / HubSpot] via API. Every week when I ask, pull the following live data across all teams: total pipeline created this week vs target, average days in stage by team, early-stage deal count (Stage 1–2) by team, mid-stage deal count (Stage 3–4) by team, manager name per team, deal-level flags for any deal stalled more than 14 days with no activity, and rep-level flags for any rep who has created zero new pipeline in the last 14 days.

Using this live data generate a visual HTML dashboard with three navigable views:

1. Overview — four headline metrics: total pipeline created vs target with trend arrow, average deal velocity in days with trend arrow, early-stage health status (Healthy / Needs attention / At risk), mid-stage health status (Healthy / Needs attention / At risk). Two sparkline charts showing pipeline creation and deal velocity for the last 4 weeks pulled live from the CRM. Two narrative sections: This Week vs Last Week (3 paragraphs — what changed, which team drove it, what the key risk is) and Leader Insight (one strategic paragraph for the CRO naming the most critical leading indicator, which teams are diverging, projected Q2 and Q3 outcomes if trajectories hold, and one specific intervention recommendation).
2. Teams — one collapsible row per team: team name, manager name, status badge (On track / Needs attention / At risk), pipeline vs target with color-coded progress bar, early-stage count, mid-stage count, average velocity, and the single most important deal-level or rep-level risk flag for that team this week.
3. Alerts — all rep and team risks sorted by priority (high / medium / low). For each: rep or team name, team, issue type, plain-language explanation in 2–3 sentences, and a specific action assigned to a named manager with a deadline. Include a low-priority alert for any outperforming team — name what they are doing well and suggest sharing it org-wide.

Pull all data live from the CRM at the moment I ask. Do not use cached or estimated data. Color code: green on track, amber needs attention, red at risk. The Leader Insight must read like a strategic memo — not bullet points, not a data summary. Name what will happen and what needs to change."

STEP 4

Generate the dashboard

The CRO opens the Project and asks:

"Generate this week's revenue intelligence dashboard."

Claude connects to the CRM live, pulls all pipeline data across every team simultaneously, calculates leading indicators, writes the narrative sections, and generates the full three-tab interactive dashboard in seconds.

The CRO reads the Leader Insight in under 2 minutes and walks into Monday already knowing which team needs intervention, which manager owns the action, and what the Sales trajectory looks like.

Motion 4: Sales leadership and management

7 Leading-indicator dashboards

STEP 5

Make the dashboard work for you

The dashboard is not a report to read and close. It is a live conversation you can have with your pipeline at any moment.

After reading the Leader Insight stay in the same chat and ask anything:

"What happens to Q3 coverage if EMEA does not add 6 new Stage 1 deals in the next two weeks?"

"Which team has the best velocity right now and what are they doing differently?"

"Draft a message I can send to Willem B. about EMEA's pipeline situation — direct but not punitive."

"Which deals are most likely to close this month and which ones should I stop counting on?"

"Where should I spend my time this week — which manager needs me most right now?"

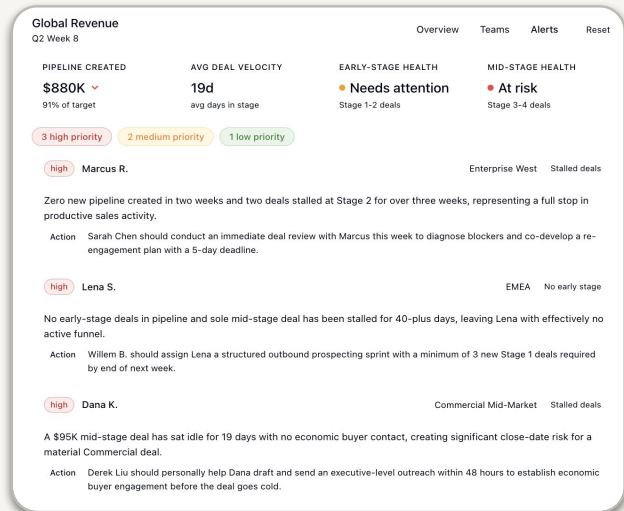
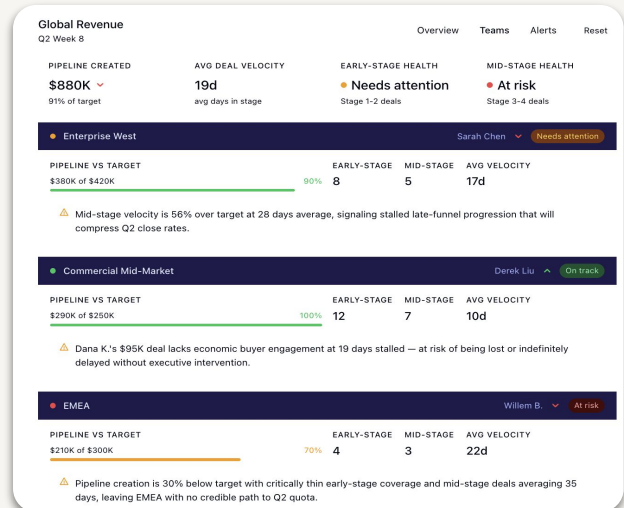
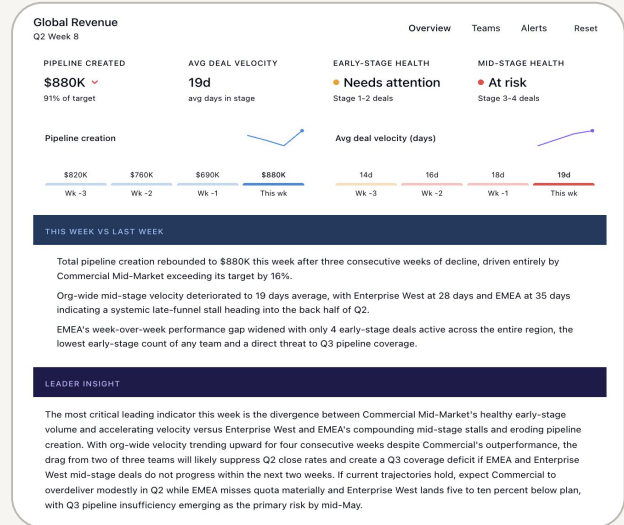
STEP 5

Build the week-over-week picture

Ask the same question every Monday. Claude reads the prior week's dashboard from the Project and generates the week-over-week comparison — what improved, what deteriorated, and whether last week's interventions had any visible effect in the CRM data.

"Where should I spend my time this week — which manager needs me most right now?"

By week 4 the Leader Insight section is drawing on a month of trend data — the recommendations become sharper, the pattern recognition becomes more precise, and the CRO stops being surprised by anything.



READY TO OPERATIONALIZE THIS FOR YOUR TEAM?

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