



Suhas Bhairav

AI Account Research Playbook

**Practical, repeatable account briefs from public
and internal data.**

Deliver concise, action-ready account briefs to guide
outreach and prioritization.

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What to Automate vs Review

Set up core automation for data gathering and initial brief drafting. Humans preserve context, accuracy, and nuance.

Key move Document data sources and approvals before sharing briefs.

PRACTICAL CHECKLIST

- 01** Account data gathering: automate company basics (industry, size, revenue) from public pages.
- 02** Signal capture: automate leadership changes, funding rounds, product launches from press and filings.
- 03** Template drafting: generate standardized sections (context, priorities, signals, risks, talking points).
- 04** Quality gate: automated checks for source credibility; schedule human review for nuance and exceptions.
- 05** CRM integration: publish the brief to the account record with version tags.
- 06** Data sources & tools: public sources, internal CRM, AI drafting prompts (ChatGPT or Claude), dashboards.
- 07** Adoption tip: start with 3-5 briefs weekly; maintain consistent templates.

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Account Brief Template & Example

Define a concise, repeatable brief with sections for context, priorities, signals, risks, and talking points. Include a worked example.

Key move Use a worked example brief for a fictional account to illustrate format.

PRACTICAL CHECKLIST

- 01** Company context: industry, size, revenue, market position, and recent momentum.
- 02** Likely priorities: cost optimization, growth enablement, modernization, risk reduction.
- 03** Buying signals: leadership moves, funding rounds, product launches, vendor consolidation.
- 04** Risks & blockers: budget cycles, procurement policies, data privacy, regional restrictions.
- 05** Talking points: aligned value proposition, quick ROI, integration fit with current tech stack.
- 06** Data sources & provenance: public sites, earnings calls, press releases, internal CRM notes.

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Adoption, Metrics & Ownership

Implement in small weekly increments. Define ownership, guardrails, and success metrics to sustain improvement.

Key move Schedule weekly governance reviews; adjust prompts and sources.

PRACTICAL CHECKLIST

- 01** Pilot plan: run 4 weekly sprints with 5 target accounts to validate briefs.
- 02** Data and tools: connect CRM, public feeds, AI drafting prompts, and a central brief repo.
- 03** Approval workflow: define sign-off roles for data usage, privacy, and content accuracy.
- 04** Guardrails: enforce data licensing, PII limits, retention windows, and audit trails.
- 05** Metrics: track time-to-brief, accuracy, engagement, and win-rate lift per account.
- 06** Ownership: appoint a Playbook Owner, Data Steward, and Review Champion; set weekly governance.
- 07** Worked example: include a filled brief for a fictional account to illustrate format.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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