



Suhas Bhairav

AI Sales Call Preparation Cheat Sheet

**Five-minute workflow to auto-summarize
prospects for reps**

Automates a 5-minute scan of a prospect's site and financial news to produce a concise one-page summary for sales reps.

Suhas Bhairav

suhasbhairav.com

What to Automate & Review

This page defines the automation boundaries for a 5-minute prospect briefing: data sources, tools, and human review requirements. It helps leadership decide what to automate, what to review, and how data flows into the one-page summary.

Key move Start with a single test prospect; measure real value before broader rollout.

PRACTICAL CHECKLIST

- 01** Automate: fetch prospect website content, company news, and financial headlines weekly.
- 02** Data sources: official site, press releases, regulatory filings, and trusted financial feeds.
- 03** Tools: headless browser scrapers, RSS/APIs, and an LLM summarizer.
- 04** Human review: validate accuracy, fill gaps, and approve the final one-page brief.
- 05** Example: for a prospect, include revenue trend, top product, and recent news to tailor the brief.
- 06** Governance and privacy: ownership, access controls, audit trails, and compliance checks.

Suhas Bhairav AI Resource

Automates a 5-minute scan of a prospect's site and financial news to produce a concise one-page summary for sales...

5-Minute Briefing Flow

This section describes a practical, incremental rollout to implement the 5-minute AI briefing. Each week adds a small, validated capability and gathers user feedback.

Key move **Action: start with one test prospect and measure value first.**

PRACTICAL CHECKLIST

- 01** Week 1: finalize data sources (prospect site, press/news) and assign ownership; define success criteria.
- 02** Week 2: build a minimal fetch-and-summarize prototype for a test prospect.
- 03** Week 3: create a one-page briefing template and surface in a test CRM view.
- 04** Week 4: add confidence scores and human-review triggers for high-risk briefs.
- 05** Week 5: run a 3-rep pilot, collect feedback, and refine prompts.
- 06** Week 6: formalize governance, ownership, and key success metrics.

Suhas Bhairav AI Resource

Automates a 5-minute scan of a prospect's site and financial news to produce a concise one-page summary for sales...

Guardrails, Ownership & Metrics

This page outlines risks, guardrails, approvals, and how to measure success. It also defines ownership and accountability for the workflow.

Key move **Action: require immediate human review if confidence is low.**

PRACTICAL CHECKLIST

- 01** Risks: data errors, stale information, or misleading signals.
- 02** Guardrails: cap data sources, enforce update cadence, and require human validation for risky briefs.
- 03** Approvals: Sales Ops must approve production briefs; document rationale.
- 04** Measurement: time-to-deliver, rep usage, win-rate uplift, and forecast accuracy.
- 05** Ownership: Sales Ops as program owner; reps provide ongoing feedback and usage data.
- 06** Audit & provenance: log data sources, prompts, outputs; maintain version history.

Suhas Bhairav AI Resource

Automates a 5-minute scan of a prospect's site and financial news to produce a concise one-page summary for sales...

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

WEBSITE

suhasbhairav.com

EMAIL

suhasbhairav@gmail.com