



Suhas Bhairav

AI Sales Call Preparation Kit

Turn CRM notes and emails into focused, ready-to-use call plans.

A beginner-friendly guide to turning data into repeatable, confident call plans.

Suhas Bhairav

suhasbhairav.com

From CRM Notes to Call Plan

Convert CRM notes, emails, and meeting objectives into structured call plans. This page clarifies what to automate and what to review manually.

Key move Automate where possible, but keep human-in-the-loop for nuance.

PRACTICAL CHECKLIST

- 01** Extract account persona, pains, and buying stage from CRM notes for the plan.
- 02** Normalize fields like industry, size, region; flag gaps for human review.
- 03** Generate a clear call objective and 2-3 success metrics aligned to account signals.
- 04** Create discovery questions aligned to buying stage and typical objections.
- 05** Propose a concise agenda with time blocks and talking points.
- 06** List data sources used in the plan for auditability.
- 07** Data/tools: CRM, meeting notes, emails, prompts; human-in-the-loop review for final plan.

Suhas Bhairav AI Resource

A beginner-friendly guide to turning data into repeatable, confident call plans.

Discovery Qs, Risks, Outcomes

The call plan translates inputs into discovery questions, risks, and outcomes. Guardrails ensure data governance and appropriate human review.

Key move **Guardrails: no sensitive data leakage; keep human oversight.**

PRACTICAL CHECKLIST

- 01** Automate generation of 8-12 discovery questions tailored to industry, persona, and buying stage.
- 02** Tag objections and risks from notes; assign severity and owner for follow-up.
- 03** Link objectives to desired outcomes and measurable signals (deal velocity, time-to-value).
- 04** Require human review for open-ended questions that require context.
- 05** Implement approval step before sharing plan with prospect; maintain versioning.
- 06** Integrate with calendar or prep tools to attach plan.
- 07** Data/tools: CRM data, meeting objectives, emails, standard playbooks, prompts; governance.

Suhas Bhairav AI Resource

A beginner-friendly guide to turning data into repeatable, confident call plans.

Weekly Adoption Plan

Follow a four-week pilot to test automation, validate results, and refine prompts. Build governance and ownership as you scale.

Key move Weekly checks prevent drift; maintain auditable history.

PRACTICAL CHECKLIST

- 01** Week 1: Ingest one account; generate plan from last 3 emails and notes.
- 02** Week 2: Add CRM context; validate with rep; adjust prompts for nuance.
- 03** Week 3: Generate discovery questions; reviewers approve; track time saved.
- 04** Week 4: Extend to 2-3 more accounts; measure win-rate impact.
- 05** Ongoing: assign ownership, governance cadence, and performance metrics.
- 06** Measure outcomes: meeting prep time, discovery quality, and deal progression.
- 07** Data/tools: quality checks, versioned prompts, and audit trail.

Suhas Bhairav AI Resource

A beginner-friendly guide to turning data into repeatable, confident call plans.

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