



Suhas Bhairav

AI Sales Script Auditing and Compliance Guide

Automate outbound call reviews to enforce compliance and product guidelines.

A practical, incremental framework to automate compliance checks and improve rep adherence.

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Rules, Data, and Scope

Define the automation objective for AI review of outbound calls. Separate what to automate from what requires human review and outline needed data.

Key move Secure executive sign off on rules before automating reviews.

PRACTICAL CHECKLIST

- 01** Define compliance rules across legal, regulatory, and company policy ranges.
- 02** Identify data sources like call recordings, transcripts, CRM notes, and agent IDs.
- 03** Decide which checks to automate such as claims checks and script conformity.
- 04** Address data privacy and consent and restrict PII exposure in tooling.
- 05** List required tools like transcription, AI review, rule engine, and dashboards.
- 06** Define human in the loop for ambiguous cases and escalation thresholds.
- 07** Set initial success metrics and baseline performance for future gains.

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Automation Rollout Plan

This page outlines a practical weekly rollout from light automation to full scale. It includes example rules, data flows, and governance touchpoints.

Key move Never auto approve flagged scripts; escalate for human review.

PRACTICAL CHECKLIST

- 01** Week 1: Transcribe calls and index metadata; create a baseline for normal scripts.
- 02** Week 2: Implement automated rule checks for product claims and pricing language.
- 03** Week 3: Flag privacy PII and sensitive data; redact or mask where allowed.
- 04** Week 4: Build a reviewer queue in a dashboard and route flagged calls.
- 05** Week 5: Integrate with CRM notes and agent IDs for accountability.
- 06** Week 6: Run a pilot with 1 to 3 reps; collect feedback.
- 07** Week 7: Calibrate thresholds and expand to more reps.

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Risks and Ownership

Identify risks, guardrails, approvals, and measurement methods. Define ownership across Sales Ops, Compliance, and Sales Leaders.

Key move Assign a single owner per rule and review quarterly.

PRACTICAL CHECKLIST

- 01** Privacy and retention: encrypt transcripts; anonymize PII and sensitive data.
- 02** Model drift: schedule quarterly retraining and rule refresh to reflect product changes.
- 03** False positives/negatives: tune thresholds and run regular calibration audits.
- 04** Change control: require formal approvals for every rule update.
- 05** Data access: enforce least privilege and separate reviewer roles.
- 06** KPIs: track compliance rate, review time, escalation rate, and coaching impact.
- 07** Audit trail: timestamp rule versions and decision logs for accountability.

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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

WEBSITE

suhasbhairav.com

EMAIL

suhasbhairav@gmail.com