



FIELD NOTES / 01 / SALES PROCESS AND AI

An AI summary won't fix a broken handoff.

Find the wasted work. Fix who hands over what. Then automate the bit that is worth doing.

WHAT YOU WILL DO

Before automating a sales handoff, agree what the next person needs, who supplies it and what happens when it is missing.



SOURCE



INSIGHT



APPLICATION

ARTICLE / FILLABLE WORKSHEET / SOURCE NOTES



Start with the mess, not the model.

If you lead sales or RevOps and someone wants an AI agent to fix a messy handoff, ask them to show you the last deal that went wrong. What was promised? What did the next person receive? What did they have to chase? Those questions tell you more about the work than a demonstration of beautifully summarised call notes.

Consider a fictional SaaS business. A salesperson closes a deal and hands it to implementation. The notes say the customer wants to launch quickly. They do not say that launch depends on an integration nobody has checked. The implementation lead discovers that gap on the kickoff call. Now the customer is frustrated and two teams are arguing about what was agreed.

An AI summary might make that handoff easier to read. It cannot establish a customer commitment that was never recorded or assign an owner the teams never agreed. Our recommendation is straightforward: fix the missing agreement first. Then decide whether software can reduce the remaining work. Otherwise you risk producing a more convincing account of the same bloody confusion.

Agree what a usable handoff contains.

Sit the salesperson and implementation lead together with that deal. Follow the work from the final sales conversation to the first implementation task. Find where a missing answer became somebody else's problem. Remove repeated copying where it serves no purpose, but keep customer commitments and records that someone genuinely needs. Do not start by adding ten mandatory CRM fields.

For this fictional handoff, the next person needs the agreed scope, the customer's intended launch date and the dependencies still unresolved. The salesperson supplies the record. The implementation lead confirms whether it is usable before a kickoff is booked. If an integration remains unchecked, name who will investigate it and tell the customer what that means for the proposed date.

Try the handoff on another deal before writing an automation brief. Can implementation identify what to do without reconstructing the sale? Can sales see which answer is missing and who must supply it? A blank field is not automatically a failure: "integration feasibility unknown; technical lead to check" is more useful than a plausible answer entered merely to complete the form.



Give automation one bounded job.

Once the handoff works, choose the repetitive part. In this example, AI could draft the handoff from approved call notes and the signed scope. Ask it to link each proposed fact to its supporting record and mark missing or conflicting information. The salesperson checks the draft before sharing it. The draft must not silently change commitments or book the customer's kickoff.

That narrow job gives you something you can inspect. Compare the draft with the underlying records. Could an ordinary template and a CRM view do the same useful work? Use the simpler option if it meets the need. AI may be helpful when relevant information is spread through notes, but you still need a person to resolve ambiguity about a promise.

Keep the first trial small enough to inspect every handoff. Record preparation time, checking time, corrections and questions implementation still has to ask. Also record any wrong statement about scope or dates. Faster drafting is not enough if the next team spends longer correcting it. Pause automation when errors could mislead the customer; repair the input or process before trying again.

Write the plan someone can follow.

Here is the completed worksheet for our fictional case. Handoff: sales to implementation after signature. Missing information: the launch dependency. Required record: agreed scope, intended date and unresolved dependencies. Owners: salesperson prepares; implementation lead accepts. Automation job: draft that record from approved material, with links and unknowns visible. Trial check: the RevOps lead reviews preparation and checking work, follow-up questions and material errors on Friday.

Choose a review date and put the person running the trial in the diary. If the manual handoff still fails, keep fixing it. If the draft saves useful work without hiding gaps, decide whether to continue under the same checks. If a template works just as well, keep the template. You are trying to improve a handoff, not justify buying an agent.



Fix one handoff before automating it.

Use one recent deal. Agree this sheet with the person giving the work and the person receiving it.

Type into the fields, or print. Save a copy to retain your answers.

01 The handoff

Which task passes between which roles, and what event starts it?

02 The missing information

What did the receiver have to chase? Use an example from the deal.

03 The required record

What scope, dates and unresolved questions must the receiver see?

04 The owners

Who prepares the record, accepts it and resolves missing answers?

05 The automation job

What may software draft, from which inputs, and who checks it?

06 The trial check

Compare total work and errors. Name the trial owner and review date.

Make the handoff work first. Continue automation only when checked results justify the full work it creates.



Read further. Know the limits.

SOURCE 01 / PEER-REVIEWED FIELD STUDY

Generative AI at Work

Erik Brynjolfsson, Danielle Li and Lindsey Raymond / The Quarterly Journal of Economics / 4 February 2025 (online); May 2025 issue

Historical background reference retained from the earlier edition. This rewrite does not repeat its quantitative finding or use customer-support research to validate the proposed sales-handoff process. No current support recheck was performed.

<https://academic.oup.com/qje/article/140/2/889/7990658>

SOURCE 02 / VENDOR PRACTITIONER GUIDANCE

Free AI Agent Ops Cheatsheet for RevOps

Janis Zech / Weflow / Weflow / Undated; checked 4 October 2026

Historical vendor-practitioner background retained from the earlier edition. The handoff design and bounded drafting trial are original GTM Architect guidance, not a Weflow-endorsed method or an established return on automation. No current support recheck was performed.

<https://www.weflow.ai/resources/cheat-sheets/revops-agent-ops-cheatsheet>

OUR GUIDANCE. YOUR COMPANY'S NUMBERS.

The article and worksheet are original GTM Architect guidance. References above are background reading, not proof that our proposed approach will produce a particular result. Source dates and limitations are preserved.

Rewritten 6 October 2026. Worked examples are fictional and use illustrative assumptions, not industry benchmarks. Named companies and publishers have not endorsed these guides.

Use the worksheet with one real task, deal or customer. Replace the example assumptions with your own information before acting.