

Agentic Sales Enablement Workflow & Governance

A design framework for helping sales teams, partners and enablement teams learn faster, sell smarter and execute consistently through trusted, measurable and governed AI.

IN CONSTRUCTION

A working Seller Preparation Agent is the next build release.

The design - Four requirements for an impactful workflow

Every AI-enabled sales workflow should produce a measurable business result, provide reliable guidance, control consequential actions and improve through evidence and feedback.

BUSINESS RESULT	RELIABLE GUIDANCE	CONTROLLED EXECUTION	CONTINUOUS IMPROVEMENT
Faster seller ramp-up and preparation	Answers grounded in approved, current and permission-appropriate sources	Human approval before consequential actions are completed	Feedback and performance measures used to evaluate and improve the workflow

01 / FRAMEWORK

Start with the enablement outcome, not the tool

An impactful workflow aligns the four requirements **before** an agent is built.

REQUIREMENT	WHAT MUST BE DEFINED	DEFINING QUESTIONS
1 Business Result	User need, desired business outcome and economic value	- Who needs help, at what point in the sales process and why? - What measurable result should improve? - Does the expected value justify the cost and effort?
2 Reliable Guidance	Approved knowledge and a useful user experience	- Which sources may the agent use? - Are they current, approved and permission-appropriate? - What should the user receive: citations, recommendations, playbooks, coaching or learning guidance?
3 Controlled Execution	Decision boundaries, tools and human approval	- What may the agent recommend? - What tools may it use? - What information may it change? - Which actions require confirmation, approval or escalation?
4 Continuous Improvement	Adoption, measurement, feedback and refinement	- How will users learn to use and trust the workflow? - How will quality, adoption and business impact be measured? - How will feedback and failures improve the workflow?

Select Measures of Impact

Begin with a priority product, workflow or sales team. Use existing system data where possible and expand measurement as the workflow scales.

REQUIREMENT	MEASURE	PROPOSED MEASUREMENT METHOD
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REQUIREMENT	MEASURE	PROPOSED MEASUREMENT METHOD
Business Result	Ramp time	Compare the time for new sellers to reach defined readiness before and after the pilot.
Business Result	Seller productivity	Measure time saved or the number of completed seller activities.
Business Result	Pipeline velocity	Compare the time opportunities take to move between sales stages.
Business Result	Business impact	Compare pilot benefits (time saved, productivity or revenue influence) with implementation cost.
Reliable Guidance	Quality and content accuracy	Review a sample of responses for correctness, approved sources and citations.
Reliable Guidance	Content usage	Track which recommended materials sellers open, use or share.
Controlled Execution	Workflow completion	Track completed workflows compared with workflows started.
Controlled Execution	Approval compliance	Confirm through workflow logs that restricted actions received human approval.
Continuous Improvement	Learning completion	Track completion of assigned role-based learning and assessments.
Continuous Improvement	Seller adoption	Track active users, repeat use and usage by product or seller group.
Continuous Improvement	Coaching effectiveness	Use agreed-upon coaching criteria to compare seller performance before and after AI-supported coaching.
Continuous Improvement	Stakeholder satisfaction	Survey participating sellers, sales managers and the enablement team after the pilot to assess usefulness, accuracy and overall satisfaction.

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Enterprise technology program leader focused on connecting AI strategy, subject-matter expertise, people, processes, platforms, governance and measurable outcomes.

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