02 / PREPARATION THE OPPORTUNITY

Give the next seller the context your best seller already has

Javier Masides · Agentic Worklabs · 9 September 2026

Your strongest seller can walk into a meeting knowing why the account is interested, what happened last time and which question could move things forward. Someone else spends half an hour opening tabs and still misses the detail that matters.

There is a practical AI use case here: make the relevant context easier for the whole team to use. The output should help someone prepare a better conversation. A long company profile rarely does that on its own.

I would first sit with the person who prepares well and watch a real example. Which sources do they trust? What do they leave out? Which detail changes the agenda? That gives us a standard to build against, including the judgment that a generic research prompt misses.

01
Observe good preparation

02
Build the useful brief

03
Deliver it into the day

02 / PREPARATION THE WORKING EXAMPLE

A brief the seller can act on

Consider a fictional account, Northstar Accounting. The CRM says it is a prospect testing a bill-payment product. A recent call records a question about export fields. An email mentions bringing an operations lead into the discussion once that question is answered.

An unhelpful brief might describe Northstar as a customer, invent a revenue figure and suggest an expansion pitch. Each claim sounds plausible. Together they put the seller into the wrong conversation.

The improved version is short enough to use before the meeting:

Before	After
General company profile	Prospect testing bill payments; status comes from CRM A-104
Assumed buying priorities	Export requirements are the stated blocker in CALL-01
Generic talking points	Confirm supported fields and understand the operations team's review
Suggested expansion pitch	Ask what would let Northstar complete its evaluation
Unclear origin of facts	Source and date beside each material claim

The preparation artifact has five parts: account and relationship status, the reason for this meeting, what changed since the last interaction, questions to resolve, and the evidence behind the brief. Anything that does not help the conversation can stay in the source systems.

02 / PREPARATION INSTRUCTION & ADOPTION

A starting instruction

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Prepare a meeting brief for account [ID] using the approved records below.
State the relationship status, meeting purpose and most recent commitments.
Include the source and date for each material fact.
Separate confirmed facts from questions we need to ask.
Suggest three discussion points tied to the meeting purpose.
If account identity is unclear, stop and ask for confirmation.
Keep the brief under 250 words. Do not invent commercial figures or intent.
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Test it with records the team already knows. Include two accounts with similar names and one case with contradictory notes. A seller should be able to see both the useful context and the uncertainty without hunting through another document.

Make preparation part of the working day

A supervised example is the starting point. A repeatable workflow then needs a reliable meeting trigger, the correct account match, relevant source access and an obvious place to find the result. If the brief arrives in a channel nobody checks, the useful work still has not reached the seller.

Measure preparation plus review time. Check factual accuracy and ask whether the brief changed the seller's agenda. A faster brief that misses the customer's open issue has failed its purpose.

An agent connected to company knowledge can help prepare discovery calls and customer briefs. The implementation work is deciding which context matters, making the output useful and putting it where the seller will use it. The first test should use your records and your sellers' definition of a good brief.

Bring one example of excellent preparation and one that took too long. That is enough to start designing a better default for the team.

02 / WORKFLOW MAP PUT THE ARTICLE TO WORK

Make context usable before the meeting

A brief is useful when it changes the conversation and makes uncertainty visible.

01

Start with a reliable meeting trigger

Match the meeting to the correct account and approved records.

Account identity unclear? Stop and ask for confirmation.

02

Select the relevant context

Use relationship status, meeting purpose, recent changes, open questions and evidence.

03

Draft a brief under 250 words

Include source and date for each material fact. Separate confirmed facts from questions.

Do not invent commercial figures or intent.

04

Review, then deliver where the seller works

Suggest three discussion points tied to the meeting purpose. Make the brief easy to find.

05

Test usefulness as well as speed

Measure preparation plus review time, factual accuracy and whether the brief changed the agenda.

TEST CASES	DEFINITION OF GOOD
Use familiar records, two accounts with similar names and a case with contradictory notes.	Bring one excellent preparation example and one that took too long. Use the team's own standard.

Workflow synthesis based on this article. Read alongside the full examples and qualifications.