SALES AI USE CASE | PLAYBOOK

The Sales Rep Intelligence Playbook

How a sales organization gave every rep a self-service dashboard of AI-powered insight cards, answering business questions as text or charts.

Sales | AI Analytics | Interactive Dashboard

TECHNOLOGY STACK

Salesforce Sales Cloud · AI Agent (AI Analytics) · Interactive Insights Dashboard (text and chart views)

EXECUTIVE SUMMARY

Every rep's questions, answered on one dashboard

Sales reps make better decisions when they can see what is happening in their pipeline, accounts and deals, but answers usually meant static reports or waiting on analysts. Working with ABSYZ, a sales organization built the Sales Rep Intelligence Dashboard: a visual workspace where reps create insight cards, ask business queries and save them. An AI agent answers each one as a text insight or chart, and reps can modify and re-run queries anytime.

For sales reps
Answers to their own questions, one click away

For sales managers
Reps who explore data instead of waiting on it

For analysts
Fewer repeat report requests to build

THE CHALLENGE

Static reports, slow answers

Getting answers

- **One-size-fits-all reports**
  Standard reports didn't reflect the questions each rep actually needed answered.
- **Dependence on analysts**
  New questions meant waiting on analysts or admins to build reports.

Using answers

- **Repeating the same work**
  Reps rebuilt or re-requested the same insights week after week, with no way to save them.
- **Limited exploration**
  Changing a question meant starting over, discouraging reps from digging deeper.

INSIDE THE SOLUTION

From question to saved insight card

1

Create a card

The rep adds an insight card and places it on their dashboard.

2

Ask a question

They type a business query in plain language.

3

AI answers

An AI agent returns the result as a text insight or a chart.

4

Save and re-run

The query is saved; edit and re-run it anytime for fresh results.

Inside the dashboard: saved insight cards

Example cards are illustrative

CHART — Re-run

Open pipeline by stage this quarter



TEXT INSIGHT — Re-run

Which of my deals have had no activity in two weeks?



CHART — Re-run

My closed-won revenue by month



TEXT INSIGHT — Re-run

Summarize my top accounts and next steps



CHART — Re-run

Opportunities by product line



TEXT INSIGHT — Re-run

What should I focus on this week?



THE RESULTS

Self-service insights, on demand

Up to 50%

less time on repeat work

spent recreating the same sales reports and queries

1 click

to any saved question

re-run for fresh answers anytime

Zero

report building

needed to explore sales data

2 views

text or chart

AI answers shown the way that explains them best

Figures are indicative ranges for this type of solution. Actual results vary by business, data quality and adoption.

SELF-ASSESSMENT

Are your reps ready for AI-powered insights?

Tick every statement that is true for your business today. Your answers can be saved with this PDF.

- [ ] Reps rely on static reports that don't answer their specific questions.
- [ ] The same insights are rebuilt or re-requested every week.
- [ ] New questions usually mean waiting on an analyst or admin.
- [ ] Changing a report means starting over from scratch.
- [ ] Reps rarely explore sales data beyond the standard dashboards.

Ticked two or more?

An AI-powered insights dashboard can likely give your reps faster, self-service answers.

The first card your reps would create (optional)

LESSONS FOR SALES LEADERS

Four things to get right

01 **Seed starter cards**
Give reps a few ready-made cards so value is clear on day one.

02 **Clean data, better answers**
Accurate pipeline and account data makes AI answers reliable.

03 **Let reps own their view**
Encourage reps to create, arrange and refine their own cards.

04 **Share what works**
Spread the most useful cards across the team.

Ready to give every rep instant insights?

Talk to an ABSYZ expert about building an AI-powered insights dashboard for your sales team on Salesforce.

Book a consultation

www.absyz.com

About ABSYZ: a Salesforce consulting partner helping businesses design, build and scale customer experiences across Sales, Service and AI.