A Function Paper from GRAIL

What does an AI-augmented sales department look like?

Sales department

Where a commercial function is heading in the next two to three years, and what GRAIL believes it takes to get there first.

"Judgment stays with the seller. Everything else is prepared."

01	Where is your sales team still choosing the wrong market?
02	How much of your forecast is guesswork this quarter?
03	Have your commercial leaders used what they expect sellers to use?

WHAT DOES AN AI-AUGMENTED SALES DEPARTMENT LOOK LIKE?

Where a commercial function is heading in the next two to three years, and what GRAIL believes it takes to get there first.

A seller's week is mostly research, preparation and administration. Not selling. **The change that matters is that preparation, memory and follow-through stop being personal traits and become an operating layer every seller has.** The judgment stays with the person. The rest becomes institutional.

A SELLER'S DAY, 2028

01

Morning

Account brief: correspondence, open commitments, deals losing momentum.

02

Before the meeting

Buying group, prior objections, installed base, a conversation plan.

03

In the meeting

Consented capture of decisions and commitments.

04

After

Follow-up draft, CRM update, next step, all for approval.

05

The week

Pipeline review opens with ten exceptions, not every deal.

Judgment stays with the seller. Everything else is prepared.

GRAIL's view, from building this inside commercial organisations. A position, not a survey.

THE FUNCTION TODAY

Capacity goes to everything except *selling*.

A mid-market commercial function is typically ten to sixty people: a sales director or CCO, country or regional managers, account executives, key account managers, sales development, sales operations, bid support and sometimes solution engineers. Marketing, customer success and pricing may report into the same leader or sit beside sales.

It drives the top line through acquisition, expansion, retention and price realisation. It also shapes contribution margin, working capital and delivery quality, because a poorly qualified deal can create revenue while destroying margin or consuming scarce delivery capacity.

Ten processes

01	Territory and account planning	06	Pipeline review and forecasting
02	Prospecting and outbound	07	Key account management and renewals
03	Meeting preparation and follow-up	08	Pricing decisions
04	Proposal and quote production	09	Handover to delivery
05	Tender responses	10	CRM hygiene

Where the information lives is the problem. The CRM, mail, calendars, call recordings, chat, ERP order history, CPQ tools, service tickets, document stores, proposal folders and private spreadsheets. Relationship history and product judgment sit disproportionately in senior sellers' heads. CRM records carry stages and amounts without the evidence behind them.

Sellers spend roughly forty percent of their time selling. The rest goes to research, preparation and administration.

Salesforce's 2026 State of Sales survey puts selling time at 40 percent. LinkedIn's 2025 research describes roughly six hours a week of manual CRM work. Different samples, the same constraint: seller capacity is absorbed by everything that surrounds the sale.

WHAT CHANGES STRUCTURALLY

Performance becomes *institutional*.

Two things change at the core of the function.

Seller performance becomes partly institutional rather than biographical. Every seller can receive the preparation, retrieval and follow-up discipline that used to belong to the best people. The company extracts patterns from won bids, account histories, call transcripts and product expertise, and makes them available during live work. The result is a composite seller: a person exercising commercial judgment, with an operating layer that remembers, prepares and follows through consistently. The performance distribution narrows. Relationship judgment and negotiation skill still separate the best from the rest.

Commercial management changes from collecting reports to managing exceptions. Account intelligence refreshes continuously. Pipeline review starts with unexplained changes, missing evidence and deals that need intervention. Managers stop spending the meeting reconstructing what happened and spend it deciding what to do.

> The same design improves speed and quality and reduces unit cost at once. Preparation covers more accounts, proposals arrive sooner, the record gets fuller, and senior time moves toward customers.

> WHERE IT IS WEAKEST The combination is weakest where success depends on politics, trust or novel deal design. Those stay with human judgment, and should.

THE 2028 OPERATING PICTURE

A day, a week, a *month*.

A function that invests heavily still employs sellers and account managers in 2028. Its shape changes. Fewer roles concentrate on data entry, list production or report assembly. More capacity sits in strategic account management, solution design, commercial operations and knowledge stewardship. One commercial operations owner maintains data definitions, agent permissions and evaluation sets. A twenty-person team may remain a twenty-person team while handling more accounts and more bids.

The day

MORNING

Every seller receives a short account brief: recent correspondence, open commitments, delivery issues, changes at priority accounts, deals losing momentum. The seller chooses which recommendations deserve action.

BEFORE AND DURING

Routine research has been assembled from approved company material and, where connected, the CRM, mail and public sources. The seller reviews the buying group, prior objections, installed products, open service matters and a suggested conversation plan. A consented transcription captures decisions and commitments.

AFTER

A follow-up draft, a CRM update and a next-step plan appear for approval. The seller approves the record, and the record is right.

THE WEEK The pipeline agent compares CRM fields with meetings, mail, historical conversion and delivery constraints. The review opens with ten exceptions rather than every opportunity. Managers test the evidence, coach the seller and make resource decisions. Forecast changes carry reasons and source links.

THE MONTH The commercial leader reviews account movement, price realisation, forecast error and agent reversals. Their week centres on account allocation, deal strategy, pricing guardrails, coaching, and coordination with delivery and finance. CRM administration becomes a control activity rather than a management ritual.

Continuous attention to every material account, structured preparation for every meeting, disciplined follow-up across the whole portfolio. Those used to be reserved for the largest opportunities. They become the standard.

PROCESS BY PROCESS

What runs, and what stays with the *person*.

PROCESS	WHAT THE AGENT DOES	WHAT STAYS WITH THE PERSON
Territory and account planning	Assembles account potential, relationship coverage, product fit and whitespace	Ownership, coverage intensity, the strategic bets
Prospecting and outbound	Researches approved segments, drafts account-specific approaches, routes promising replies	The market hypothesis, campaign approval, the real conversations
Meeting preparation and follow-up	Prepares the brief, captures consented notes, extracts commitments, drafts follow-up	Conversation strategy, approval of the record
Proposal and quote production	Creates a sourced draft from approved language, customer context and product rules	The commercial story; product, finance and legal approve their sections
Tender responses	Parses requirements, builds the compliance matrix, retrieves approved answers, flags missing evidence	Win themes, the submission
Pipeline review and forecasting	Detects stale deals, contradictory signals and unusual slippage	Customer politics, intervention
Key account management and renewals	Maintains the relationship map, commitments, renewal plan and whitespace hypotheses	Whom to involve, how to handle tension
Pricing decisions	Recommends a range from comparable transactions, customer context and guardrails	Exceptions explained by sellers; material deviations approved by managers
Handover to delivery	Assembles scope, commitments, exclusions and unresolved risks	Joint approval by sales and delivery
CRM hygiene	Proposes records from meetings and mail, checks required fields, explains conflicts	Approval; later, routine verified activities log automatically

The right-hand column is the one to read twice. Nothing in it is administrative. Every line is a judgment, and the point of the left-hand column is to give that judgment more of the week.

DATA AND CONNECTIONS

Four stages, and the *CRM position* today.

A realistic path has four stages. They map onto the rungs in The Access Ladder, and the order is the same.

01 **Documents only**
Meeting packs, proposal drafts and tender responses begin with curated product material, approved bids, price policies and playbooks. No live-system access. Outputs are drafts, and the seller supplies account context by hand.

02 **Read access**
The CRM, calendar and selected mailbox data come first. These remove repeated retrieval and support current account briefs. Meeting transcripts follow once notification, retention and purpose are settled.

03 **Read and act with approval**
The agent proposes notes, tasks, contacts and deal-field changes. The responsible seller sees the source and approves the write. Proposal and quote workflows then connect product, ERP, CPQ and contract data.

04 **Bounded autonomous action**
Activity logging, internal reminders and verified contact enrichment run within defined limits. Customer messages, opportunity overrides, contractual commitments and prices outside approved bands keep named human approval.

The CRM position, as of September 2026

HubSpot	Remote MCP server generally available since 13 April 2026. Governed reads and selected writes through OAuth, respecting existing permissions. Some objects read-only.
Salesforce	Hosted MCP servers generally available April 2026, Enterprise Edition and above, under authenticated-user permissions. Broader headless coverage still in beta as of July 2026.
Upsales	Official 2026 MCP connector, read-only in its first version.
Lime CRM	Mature REST APIs and webhooks. No vendor-hosted MCP endpoint could be verified; a governed gateway would wrap the APIs.
SuperOffice	States agents can connect through MCP and read or act on CRM data; the tool list and approval behaviour need validation at tenant level.

Point connections become inadequate when forecasting, pricing and account health depend on several years of CRM, ERP, service and contract history. A warehouse then gives every agent the same definition of revenue, activity and churn.

> In the headless model the CRM keeps records, permissions and audit history. Sellers work mainly through meeting, mail and briefing surfaces and open the CRM for exceptions and investigation. Every action log identifies the agent, the authenticated user, the sources, the proposed change, the approval, the before-and-after values and the system's response.

GRAIL'S THESIS

Six things we believe, from building *this*.

We have built this inside commercial organisations, not read about it. Six things hold every time, and they are the ones a leadership team most often gets the wrong way round.

01 The floor is saving minutes. The ceiling is better decisions.

Every rollout measures drafting time and adoption rates, and both are real. A commercial function can get faster at everything it already does and not close one more deal. The return sits in the quality of the account choice, the preparation and the pricing call, and nobody has built a dashboard for that yet.

02 Point it at the top line, not the bottom.

The cost side is where the business case writes itself, which is why everyone starts there and why it plateaus. The market nobody had time to analyse properly, the pricing model nobody dared reopen, the hundred customer conversations nobody had the capacity to prepare: that is where a commercial function's impact per hour actually moves.

03 The chain only works forwards.

Prospecting is only as good as the market choice before it. Meeting preparation can only show history if the last report was written. A proposal cannot contain what has not been agreed. Tooling dropped into the middle of a chain with holes underperforms, and it is almost never the tool's fault.

04 The record has to write itself, or the forecast stays a guess.

Sales management runs on a pipeline nobody maintains, because maintaining it competes with selling. When notes, actions and fields are proposed from the work and merely approved, the pipeline reflects reality for the first time, and the forecast becomes a reading rather than a ritual.

05 Augment, never automate the judgment.

The pitch, the read of the room, the negotiation and the relationship stay with the person. Everything around them, the research, the assembly, the write-up, the reminder, is the operating layer. Get that boundary wrong in either direction and the sellers either stop trusting it or stop thinking.

06 The commercial leadership goes first.

A management team can only set ambition for what it has used itself. Hand the tools to the floor and steer from outside, and the ambition caps at a faster version of last year. Put the leaders through it first, on their own accounts, and they decide from experience.

None of the six is a technology position. They are positions about how a company sells, and every tool laid on top inherits them.

WHAT IT ASKS OF PEOPLE

Roles, rhythm, and where it *fails*.

Sellers move from information gathering toward account judgment, customer dialogue and negotiation. They learn to supply missing context, inspect sources, challenge weak recommendations and recognise which outputs need approval. The average seller receives more of the best seller's preparation. Judgment still develops through experience.

Sales development shifts from sequence volume toward segmentation, message design and reply interpretation. Cheap prospecting raises competitive noise, so track positive replies, complaints and opt-outs beside meetings booked. Sales operations becomes the steward of commercial definitions, permissions, evaluation sets and agent-written data. Conversation intelligence stays a coaching input, never a hidden surveillance system.

The rhythm

FOUR TO EIGHT WEEKS	THREE TO SIX MONTHS	NINE TO EIGHTEEN MONTHS	EIGHTEEN TO THIRTY-SIX MONTHS
A document-grounded workflow changes one seller's week	A stable team rhythm	Connected read-and-write workflows	Role, territory and incentive redesign

The sequence reflects data cleanup, integration, security review and consultation with the people affected. It does not reflect model development time, which is the part everyone overestimates.

> **WHERE IT FAILS** Thin CRM data. Conflicting definitions between countries. Generic drafts nobody trusts. Automatic writes that create false certainty. Review work left on top of the old process instead of replacing it. Incentives tied to usage rather than outcomes. And the commonest of all: a successful pilot that stops, because it looked like success for about a quarter.

Involve the people whose work changes before it changes, and involve their representatives where the company has them. That is not a legal note. It is the difference between a rollout and a way of working.

HAVE YOU THOUGHT ABOUT THIS?

Twelve questions for the commercial *leader*.

Each one names something the function could do, and asks what it would change. None has a right answer.

1 Every seller could receive a current account brief before every meeting, including open promises and relationship gaps. Would better preparation change the quality of your average customer conversation?

2 Your best sellers' proposal language and objection handling could become available to the whole team. Which parts of their judgment are still trapped in personal files or memory?

3 Meeting notes and agreed actions could be drafted immediately and added to the CRM after approval. How much follow-up currently disappears between meetings?

4 Account plans could refresh when customer activity, service issues or leadership changes occur. Which important accounts are still managed from an annual document?

5 Pipeline review could begin with deals whose evidence has changed or gone quiet. How much management time is spent asking sellers for updates that systems already contain?

6 Forecasts could compare seller judgment with activity history and prior conversion. Where would earlier warning change hiring, inventory or cash decisions?

7 Every incoming tender could arrive with a requirements map, approved answers and unresolved questions. How many qualified bids do you decline because senior experts lack time?

8 Quote guidance could show comparable deals, margin boundaries and approval rules. How much margin depends today on which manager happens to review the discount?

9 Delivery could receive a sourced record of promises, exclusions and open risks when a deal closes. How much rework begins with an incomplete sales handover?

10 Renewal plans could react to service tickets, falling order frequency or missing relationships months earlier. Which customers look healthy only because nobody has assembled the full picture?

11 Prospecting capacity could become much larger while customer attention stays scarce. What rules would stop higher volume from damaging your reputation?

12 Commercial history could become a company asset rather than leaving when a senior seller leaves. Whose departure would expose the largest knowledge gap today?

These are the questions the programme is built to answer with the people who run the function, on their own accounts, rather than from the outside.