Luminote

Ebook · 2026 edition

You are not short of salespeople. You are short of their time.

A practical guide to where two days a week disappear from every sales rep, how to reclaim them without new headcount, and why **you don't need to build your own AI agent to do it**. With one principle on every page: nothing reaches the CRM until a human approves it.

20 pages

no recycled conference slides

Principle

the rep has the last word, not the model

Who it's for

sales directors, owners, B2B reps

What's inside

INTRODUCTION

A salesperson is not a developer

This ebook is not about artificial intelligence. It is about time — specifically about the two days a week your reps spend not selling, because they are describing what they sold in the other three.

Over the last two years every company has been told it needs "an AI strategy". Teams, workshops and roadmaps followed. In that same period the sales rep still opens the CRM after a meeting, retypes what was agreed from a notebook and wonders whether the client meant this year's budget or next year's.

This is not a technology problem. It is a design problem: **no human is a good interface to a database**. We ask the most expensive people in the company to do work that requires none of their experience, none of their relationships and none of their instinct.

So you will not find prompt tips here, nor encouragement to build your own agents. Your team consists of salespeople, not an R&D department. When sales starts maintaining software, it stops selling — and the company pays for both.

What you will find are four things: the arithmetic of what admin really costs you; a description of the mechanisms that break your forecast; three levers of effectiveness that require no new headcount; and an honest buy-or-build calculation together with the data-security questions worth asking before you sign, not after.

And one principle running through all of it: **the machine prepares, the human approves**. Nothing lands in the CRM or goes out to a client without the rep's decision — because the rep owns the relationship, not the model.

How to read this ebook

Every chapter ends with something to do, not something to consider. If you only have time for one page — open the worksheet on page 07 and calculate your four numbers. The rest is commentary on that result.

CHAPTER 1

Where the quarter goes

Before you add targets or people, it is worth checking how much capacity you already have — just spent on something other than selling. **There is usually more of it than anyone assumes.**

1.1 · DIAGNOSIS

Anatomy of a sales rep's week

A rep works forty hours. They sell for roughly half of them. The rest is spread across activities that appear in no job description and against which nobody is measured — because they are invisible.

ACTIVITY	THE WEEK OF AN AVERAGE B2B SALES REP
Client conversations	Meetings, calls, demos — the work they were hired for
Filling in the CRM	Notes, stages, contacts, tasks. Usually in the evening or in bulk on Friday
Reconstructing agreements	Searching emails and notebooks for what was promised, and to whom
Reporting	Preparing for the pipeline review and explaining deal status
Writing follow-ups	Summarising the call and the next steps, usually late

~8h
of admin per rep, per week

1 in 3
pipeline deals with an out-of-date stage

2 days
a week spent outside selling

This is not a discipline problem

Every team has already tried to fix it with reminders, training and simpler forms. The effect lasts a few weeks, then returns to the starting point — because the problem is not willingness, it is that the work is done by a human after eight hours of talking.

1.2 · HIDDEN COST

The context-switching tax

Eight hours of admin is the visible cost. The second, higher one comes from the fact that this work is chopped into fragments and squeezed between conversations.

After every meeting the rep performs the same micro-ritual: end the call, open the CRM, recall which stage the deal was at, decide what to record, record half of it, move on to the next meeting. None of it is hard. All of it takes the attention that was meant to go into preparing for the next conversation.

Client conversation	45 min
A "quick" note in a notebook	4 min
Back to the CRM in the evening	11 min — because it all has to be recalled
Finding what was promised in March	9 min
Follow-up written from scratch	14 min

Three consequences that show up in results

01 **A late follow-up.** The email goes out in the evening or the next day — when the client is already talking to someone else or back on their own to-do list.

02 **Lost detail.** The conclusion gets recorded instead of the fact. "Client interested" instead of "budget approved for Q3, the COO decides, a competitor dropped out over integration".

03 **Fewer conversations.** The calendar fills with buffers for paperwork, so the week holds fewer meetings than it could.

The operational conclusion

The point is not for the rep to write notes faster. The point is for them not to write notes at all — and for the record of what was agreed to be created during the conversation, not after it.

1.3 · TO DO

Worksheet: calculate your admin cost

Four numbers. Fifteen minutes. A result worth having in the next conversation about hiring another rep.

Number of reps in the team People who talk to clients and fill in the CRM	
Hours of admin per person per week Ask the team. They usually report less than the calendar shows	
Cost of one hour of a rep's time Fully loaded salary divided by hours	
Average value of one deal To translate reclaimed hours into revenue	

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A × B = hours reclaimed per week
A × B × 4 = hours reclaimed per month
A × B × C × 4 = monthly cost of admin, in money
(A × B) ÷ 40 = sales headcount you already have
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5 × 8 h = 40 h

Five reps add up to one full sales FTE per week.

One you don't have to recruit, onboard or convince to keep the CRM current. You have already hired them — they are simply busy retyping what was agreed.

CHAPTER 2

Data you can trust

The forecast is not malicious — it is simply built out of opinions. This chapter is about turning it into something grounded in evidence from actual calls, **without adding reporting work for the team**.

2.1 · MECHANISMS

Why the pipeline lies

Not out of bad faith. Because of three mechanisms at work in every sales organisation — including yours.

01 **Optimism in good faith.** The rep judges the odds by how the conversation felt, not by what was said in it. A pleasant call with someone who has no budget looks better than a difficult call with the decision-maker.

02 **Measuring activity.** If we measure the number of deals in the pipeline, the pipeline will be full. Nobody marks an opportunity lost the day before the review.

03 **Data entered after the fact.** A stage set a week after the call describes the memory of the call, not the call. And memory smooths things over.

Deal in the board report	90% · closing this quarter
Last contact with the client	4 months ago
Decision-maker present at the meeting	no
Budget confirmed on the recording	never mentioned
Last note in the CRM	"call them"

None of those lines requires interpretation. All of them are verifiable — provided somebody recorded them. **Forecast accuracy does not depend on the manager's experience, only on whether facts are attached to the deal.**

A simple test for your next review

Take your three biggest deals and ask one thing about each: when did we last speak to the person who signs? Not the forecast, not "it feels like it's moving". A date and a name.

2.2 · THE STANDARD

What to capture from every call

Not everything. Six things — the ones that actually change where you place the deal and what you do next.

DATA POINT	WHY IT CHANGES THE FORECAST
Budget	Whether it exists, when it is planned for and who controls it
Decision-maker	Whether they were on the call, or only someone who will relay it
Problem	Named by the client in their own words, not translated into our offer
Objections	What actually blocks the decision — price, risk, integration, internal politics
Deadline	The event that forces a decision, or the absence of one
Next steps	Who, what and by when — on both sides

The rule: facts, not conclusions

"Client interested" is a conclusion and cannot be verified. "He said he has to close this before the September audit, the budget is in this year, but he needs CFO sign-off" is a fact — and it tells you immediately what to do next.

The difference between the two is not the rep's diligence. It is whether the record is created during the conversation or from memory three days later.

> **A minimum standard to adopt this week**
>
> The six fields above on every deal, filled in with a quote or a date, not an assessment. If a field stays empty after a call — that is information too: you don't know what you should about that deal.

2.3 · METHODOLOGY

MEDDIC without forms

Most teams have adopted some qualification methodology, and most of them fill it in selectively after six months. Not because the methodology is bad — because it requires extra work after the call.

ELEMENT	WHAT TO LOOK FOR IN WHAT THE CLIENT SAID
Metrics	The number the client wants to improve — and by how much
Economic buyer	Who signs. A name, not a job title
Decision criteria	How they will know they chose well
Decision process	How many stages, who else weighs in, how long it takes
Identify pain	The cost of not deciding, in the client's own terms
Champion	Who will push this internally when you are not in the room

All of this information comes up on calls — it is simply never recorded anywhere it can later be used. **Qualification should be a by-product of the conversation, not a separate task after it.**

Once it stops being a task, something non-obvious happens: the methodology starts being used even by the people who disliked it. Not out of conviction — out of the absence of effort.

What changes when qualification is automatic

The manager stops asking "what stage is this at?", because they can see which elements are missing. The rep stops defending an assessment, because there is nothing to defend — there are quotes under the deal. The review shrinks to a conversation about what to do, rather than about how things stand.

CHAPTER 3

Effectiveness, not effort

Reclaimed hours do not sell by themselves. This chapter is about three places worth investing them — **and about why all three are cheaper than a new hire**.

3.1 · LEVER ONE

Follow-up speed

Between the end of a call and the email confirming what was agreed, several hours or a day usually pass. In that window everything you cannot influence happens on the client's side.

A follow-up sent immediately does three things at once: it proves you were listening; it locks in your version of what was agreed before another one appears; and it gives your champion material to present internally. The same email sent the next day does only the first of those.

WHEN IT GOES OUT	FOLLOW-UP THAT EVENING OR LATER	FOLLOW-UP WITHIN MINUTES
Content	A summary from memory, generalities	Specific agreements and quotes from the call
Client's context	Back on their own tasks and other vendors	Still thinking about the conversation
Champion's role	Has to reconstruct the arguments themselves	Has ready material to pass on
Cost to the rep	10–15 minutes after hours	Reading it and hitting send

What to measure

One metric: the average time from the end of a meeting to sending the summary. It is easy to obtain, nobody reports it, and it shows very clearly how much capacity admin is eating.

This is the cheapest lever in the whole ebook, because it requires no process change and no new people — only the removal of one step nobody wants to perform anyway.

3.2 · LEVER TWO

Coaching on every call

A typical sales manager judges the team's work on the basis of a handful of calls a month — the ones they attended and the ones they were told about. That sample is unrepresentative by definition.

The consequence is predictable: coaching addresses what the manager happened to see, not what most often breaks deals. The most expensive mistakes are usually repeatable and quiet — the question nobody asks, the objection everybody talks around, the decision-maker nobody requests a meeting with.

- **Patterns instead of anecdotes.** You can see that in seven of ten lost deals nobody spoke to the person who owns the budget. That is a training topic, not "we need to try harder".
- **A library of good moments.** Snippets of calls where somebody handled a specific objection well are better training material than any presentation.
- **A conversation about facts.** Feedback based on a recording is not a judgement of a person. It is a conversation about one specific minute of one specific call — which is why it doesn't end in defensiveness.

The condition without which this doesn't work

Recordings cannot be a control instrument. If the team decides they exist to catch mistakes, people will stop speaking freely — and you will lose the only credible source of data you have. State the rule at the outset: recordings exist for shared learning and to take the paperwork away.

3.3 · LEVER THREE

Onboarding from recordings

A new rep usually needs several months to reach their first deal on their own. Most of that time goes not into the product but into the client's language: which words they use, what actually hurts and what we say when they compare us with a competitor.

That knowledge is in no presentation. It is in the conversations — and until now it has been transferred by "sit in on a few meetings with Michael".

ONBOARDING ELEMENT	THE CLASSIC WAY	FROM RECORDINGS
Client's language	A few meetings as an observer	Dozens of real calls in the first week
Objections	A list from a deck	Recorded answers that actually worked
Deal context	Empty CRM fields left by a predecessor	The full call history handed over with the deal
Turnover	Knowledge leaves with the person	Knowledge stays in the company

A side effect that sometimes matters more than onboarding itself

When a rep leaves, their deals do not restart from zero. Whoever takes over knows what was promised, to whom and why — with no archaeology in the inbox and no phone call asking "do you remember what you agreed in March?".

It is also the only one of the three levers that works **in the opposite direction to recruitment**: the better you use recordings, the less expensive every future change in the team becomes.

CHAPTER 4

Buy or build

The most expensive decision in this ebook. Usually made enthusiastically in March and quietly revised in October. **You are a salesperson, not an R&D department — and that is an argument, not an excuse.**

4.1 · THE ARITHMETIC

The real cost of your own AI agent

Building an assistant that summarises a call is genuinely easy today. The trouble is that summarising a call is about five percent of the work — and the other ninety-five begins exactly where the demo ends.

AREA	YOUR OWN AI AGENT	AN OFF-THE-SHELF TOOL
Prototype	A few days. This part always goes well	Not applicable
CRM integration	Field mapping, edge cases, two-way sync	Ready, maintained by the vendor
Quality on real calls	Accents, interruptions, industry jargon, a bad microphone	Trained on thousands of calls
Maintenance	Permanent. Models, APIs and CRMs change without consulting you	Included in the subscription
Compliance and GDPR	Your responsibility: contracts, data location, audits	Documentation ready before your lawyer asks
Time to value	**Months, with a risk of abandoning the project**	**Minutes**

When building does make sense

When your sales process is genuinely unique, you have your own product team with spare capacity, and you treat the tool as part of your competitive advantage. In every other case you are building infrastructure that somebody else already maintains more cheaply.

4.2 · BUYER'S CHECKLIST

Five questions for your vendor

Ask them on the first call. The answers should come immediately — not "let me check and get back to you".

1. After a call, do I have to enter data by hand?

If so, you are buying a notepad, not a system. The record should create itself, with the rep only approving it — one glance, not a quarter of an hour of retyping.

`Red flag: "you just copy the summary across"`

2. Does the tool change my forecast?

A solution that never touches the forecast has no effect on the quarter — it has an effect on your archive.

`Red flag: no answer about CRM fields`

3. Where do the recordings physically sit, and who trains on them?

The country of the servers and the answer about model training should both come in one sentence. For a European company that is not a formality, it is a precondition.

`Red flag: "in the cloud, with our provider"`

4. What happens when a rep leaves?

The history of calls and agreements should stay with the deal, not with the user account.

`Red flag: data attached to a person, not to the company`

5. How long is the rollout, and who does it on our side?

If the answer contains the word "project", calculate the cost of your own time and add it to the price.

`Red flag: IT resources required for several weeks`

TO DO

A 30-day rollout plan

No transformation, no steering committee and no AI strategy. Four weeks, one metric, one decision at the end.

WEEK 1

Measure the starting point

Calculate the four numbers from the worksheet on page 07 and record the average time from meeting to summary sent. Without that you cannot demonstrate the effect later — or challenge it.

WEEK 2

Record everything

One team, every call, with a clearly communicated rule: recordings exist to remove paperwork and to learn together, not to monitor. Set the six fields from 2.2 as the mandatory standard.

WEEK 3

Cut out manual entry

Data from calls should arrive ready to approve, not ready to retype. This week nobody fills anything in during the evening — if something is missing, that is a configuration error, not a discipline problem.

WEEK 4

Compare and decide

The same four numbers, the same follow-up time, the same pipeline completeness. If the difference is visible — roll it out to the rest of the team. If not — you know after a month, not after a year.

One metric for the whole pilot

Hours reclaimed per rep per week. Everything else — data completeness, forecast accuracy, follow-up speed — is a consequence of it and belongs on a slide, not in a decision.

FINALLY

You already have the team. Give them back a week.

Luminote listens to sales calls, prepares the CRM entry, the MEDDIC qualification, the forecast update and the follow-up — and the rep approves it all at a glance. **35 integrations, a 7-minute rollout, data on servers in the European Union — and we never train models on your conversations.**

+8 h
per rep, per week

12 days
to return on investment

See the demo — luminote.io →