

Agentic Sales Cycle



Ideal Agentic Sales Cycle

Ensuring next steps and activities are aligned to outcomes

- Net New Logo: **Business Owner Qualification First**
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Purpose: Establish trust, uncover pain, and align around the potential for automation/AI as a lever.

New Logo

- Entry Criteria:
- Persona: Net New Logo: **Business Owner Qualification First**
 - Marketing Event (In Person or Online Engagements)
 - Webinar, Whitepaper, Automation Summit, LinkedIn
 - Prospect expressed interest and agreed to initial conversation.
 - Line of Business engages
- Key Activities (Agentic Lens):
 - Understand Interest and what resonated
 - Research Company & Understand automation external influence (AI, automation benchmarks, industry-relevant outcomes).
 - Co-discover — not just “what problems exist” but “what outcomes would change their operating model.” Discover Questions
- Exit Criteria:
 - Documented customer pains tied to **measurable business outcomes**.
 - Agreement on a **next conversation** to quantify impact.
 - Identification of **executive-level interest or sponsor**.

Existing Customer:

- Entry Criteria:
- Persona:
 - Existing IT Automation COE Leader
 - Executive Alignment
 - Marketing Events
 - Webinar, Whitepaper, Automation Summit, LinkedIn, Existing RPA Customer
- Key Activities (Agentic Lens):
 - Build off existing Automations with RPA – where they want to go deeper with Agentic
 - Use Case Ideation – what use cases are going to drive the highest value
- Exit Criteria:
 - Understand who
 - Documented customer pains tied to **measurable business outcomes**.
 - Agreement on a **next conversation** to quantify impact.
 - Identification of **executive-level interest or sponsor**.

Entry Assets:


[FINS Marketing Canvas](#)

Marketing Events (In Person)

- Webinars
- Whitepapers
- LinkedIn
- Existing RPA customer

Key Assets Leveraged:

- First Call Deck – Agentic Education
- Solution Kit – Use Case Exposure



Educate &
Initiate:
Business Qualification



Educate &
Initiate:
Technical Qualification

Discovery Phase: Agentic Qualification Discovery Questions

- Discovery Level Set: Positioning and knowledge:

- Agent, Bot, do you know what lang is?
- Where are you in your maturity level?
- Co-pilot? How does the company approach Ai?
- When would you buy vs. Build?
- Executive Charter? Board Level? KPI's on leveraging?
- Customer facing Ai vs. Internal?
- Do you have an Ai officer? Where do they sit? Data Science, AI, Machine learning, etc? Organizational structure
- Who needs to be included in your evaluation process (EA, Review board?)
- Amend the Master for AI/Cloud terms and that cycle? (Legal Ai addendum)
- What's your typical evaluation process? (POC, Pilot, etc)
- What other systems are you looking at to solve x problem? (use to differentiate) Where else are pilots being run? With who?
- Do you have a use case Governance board – They won't approve a model but they will approve a use case? Use case approval board? (unassisted agent) higher level of infosec
 - Model Review, use case review, group use cases
- Validate: Calendar year Budget (May-July) for next calendar year
- Forecasting for consumption? Current Use Case Utilization – Agent Unts, Maestro
- Competitor (Microsoft, Google, Writer – Market awareness classification (agent builder, orchestrated, coded agents, etc) Market Classification and putting them...
- X – Agentic (foundational Model companies
- Agent builder Experience
- BPMN
- Service Providers
- How do you classify and here are the ones we need to worry about

Agentic Field Case Study Entry Criteria

Discovery

	Voya	WEX	JPMC	FISERV	Western Alliance
Existing RPA	<ul style="list-style-type: none"> - Existing RPA - Cloud 	<ul style="list-style-type: none"> - Existing RPA - Cloud 	<ul style="list-style-type: none"> - Existing RPA - Cloud 	<ul style="list-style-type: none"> - Existing RPA - Cloud 	<ul style="list-style-type: none"> - Existing RPA - Cloud
Executive Sponsorship - CFO	<ul style="list-style-type: none"> - CTO - Agentic Workshop 	<ul style="list-style-type: none"> - CTO - Hackathon 	<ul style="list-style-type: none"> - Managing Dir of transformation and ops 	<ul style="list-style-type: none"> - SVP of intelligent Automation – reports to CTO 	<ul style="list-style-type: none"> - CTO
Started with Contact Center of the future (agentic workshop)	<ul style="list-style-type: none"> - H.S.A - Use case was hook (Accidental claims) 	<ul style="list-style-type: none"> - Use Case – Executive Briefing for CEO – Contact Center email agent *(provide more value) - Initially looking at CM and was replaced by agent 	<ul style="list-style-type: none"> - Agentic Workshop - Innovation Days – "Automation Champions" 	<ul style="list-style-type: none"> - Forward 2024 – Jumped into Agent Builder / IXP (Private Preview) - Early FDE – Product Engagement (Weekly) 	<ul style="list-style-type: none"> - Two Use cases – IXP/Agent Forward
Current operations (1) Reduce count (2000->)	<p>Outcomes:</p> <ul style="list-style-type: none"> - KPIs from luke, aaron, simi 		<p>Simi/Aaron/Luke</p>	<ul style="list-style-type: none"> - Early Agent Adoptor 	<ul style="list-style-type: none"> - Net New Use Cases outside of F - Custom Demo – High level POC vs. Microsoft)
Annual OpEx Savings	<ul style="list-style-type: none"> - Increase agent accuracy? 	<ul style="list-style-type: none"> - Outcome: 	<p>HR Payroll automation (internal systems)</p>	<ul style="list-style-type: none"> - First Agent – 8/25 - Use Case: MCC – Merchant Category Codes – Credit Card transactions come in and team of people were going through codes manually. They build an agent w/context grounding. 	<ul style="list-style-type: none"> - Document Operations – shared points *two additional use cases identified*
Use case to test (agentic #2)	<ul style="list-style-type: none"> - Reduction targets? Throughput vs. People 	<ul style="list-style-type: none"> - Reduce manual email outcome (Targets) 		<ul style="list-style-type: none"> - Build-a-bot-hackathon – agent use case, innovation day - Executive Briefing to Global COO w/ AI - Leverage Equifax in ATL <ul style="list-style-type: none"> o Structure/Outcomes 	<ul style="list-style-type: none"> - Ready to go big – moving to platform units/universal pricing \$600K (10Million pages) - 4 use cases based on volume - At Capacity in next year - Use cases are combo of IXP and Agents - Mindset that they will move everything over from RPA (unattended robots) to Maestro/Agentic
					<ul style="list-style-type: none"> - Deck

Discovery Phase: Agentic Qualification Discovery Questions

Tower Federal Credit Union

- Existing RPA
- Cloud
- COE Lead – Reports to CFO
- Agentic Executive Brief with CFO
- Negative News Screening (first use case)
- Worked in agent use case into renewal

Fulton Bank

- Existing RPA
- Cloud
- SVP of Software and Data – report to CIO
- Agentic Executive Brief (Informal)
- Overview with COE Team (In Person)
- Identified Use Case: Custom Demo
- Working into Renewal – trying to migrate to unified pricing
- Requirements come from the Business
- Proposal Deck Link

Citico

- Existing RPA
- Cloud
- EVP of Transformation
- Workshop – Maestro/Agentic (In Person)
- Use Case: Month End close Process
- Working on 1-3 workshops more
- Rip and Replace for unified pricing

