Solution Overview: Sales Form with AI

Business / Strategic Context

Most Vercel customers funnel through the generous free-tier and low-priced subscriptions. For the enterprise level, transitions onto a new architecture are not always straightforward, requiring vendor research up front to even consider a transition. To this end, the current sales form on Vercel's contact page is primarily aimed at enterprise customers requiring white-glove attention.

Presently, the sales form collects a small amount of information and passes it to the sales team to manually respond to. By introducing an AI-powered solution to this experience, we can improve customer interactions by decreasing response time and increasing response quality.

The Solution

I identified two primary areas of improvement for the sales form.

1. **Front End (non-AI improvements):** I built a multi-step version that attempts to gather more granular information about the prospects needs - modeled after Typeform's Contact Sales experience.

2. **Back End:** I used a combination of a few paradigms - I think "Agent-in-a-Workflow" might be the most accurate description. Upon form submission, we can use a research agent to gather helpful context - both about the prospect (web research) and about Vercel's offerings (internal knowledge base). Then, that research is passed to a writing step who finally hands it off to the sales team via Slack. Of course we could simply email the prospect back directly - we have their email after all - but I believe the human-in-the-loop pattern would be better to start with until the generated emails require no modifications. **Total time to response: 1-3 minutes.**
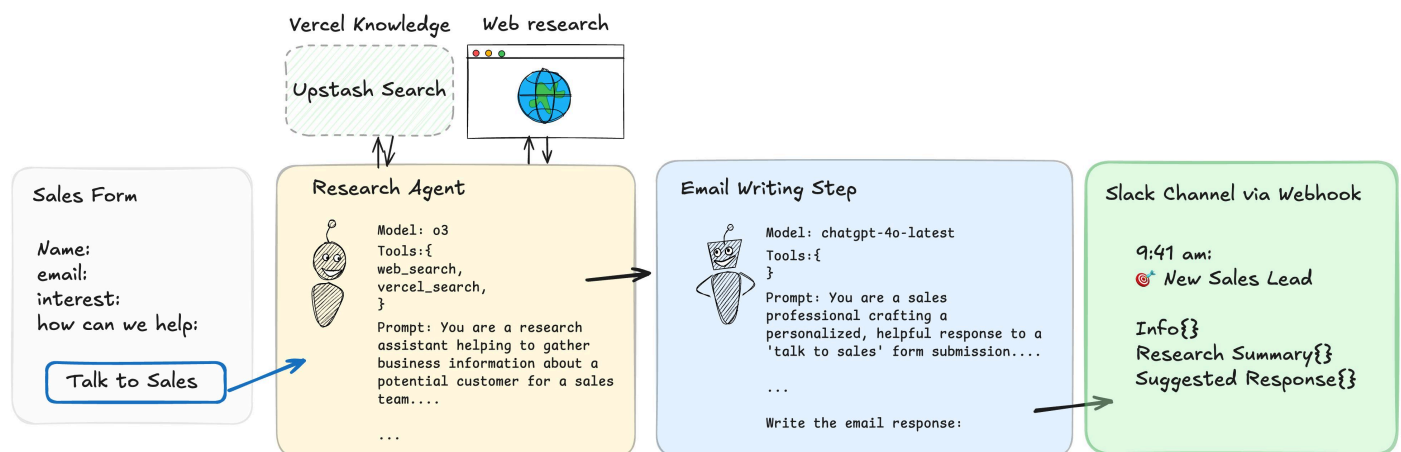

Figure 1: Form entries trigger agentic research across the web and internal data sources. The research is passed to a copywriter step that tunes the communication and sends to Slack with research and suggested response.

Why This Solution

I explored real time research on the form as soon as the prospect entered their email. While interesting, I didn't feel like it was a truly helpful direction unless you pivoted into a full blown chatbot (which is not necessarily a bad idea, in my view.)

While building, I noticed that the messages were too generic and didn't reflect the familiar Vercel voice. Worse, they often overlooked the key selling points of Vercel. So I scraped and formatted content from vercel.com/resources to build a knowledge base with Upstash Search. By exposing these as a dedicated search tool for the research agent, the relevance and tone of the replies immediately increased. I'm imagining these documents are akin to a sales script.