

# THE AI COACHING PLATFORM

From Invisible Backend to  
Engaging Coaching Product

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# Overview

Knode is an AI startup focused on analyzing and improving sales conversations. When I joined, the team had a backend system that scored calls against playbooks—but no UI, workflows, or way for managers and reps to use the insights.

# My Role

I joined as a consultant and founding designer, working with the Product Lead and Product Manager to design the first UI/UX layer of the platform—turning complex AI outputs into intuitive coaching experiences sales managers could use.

# Business Goals

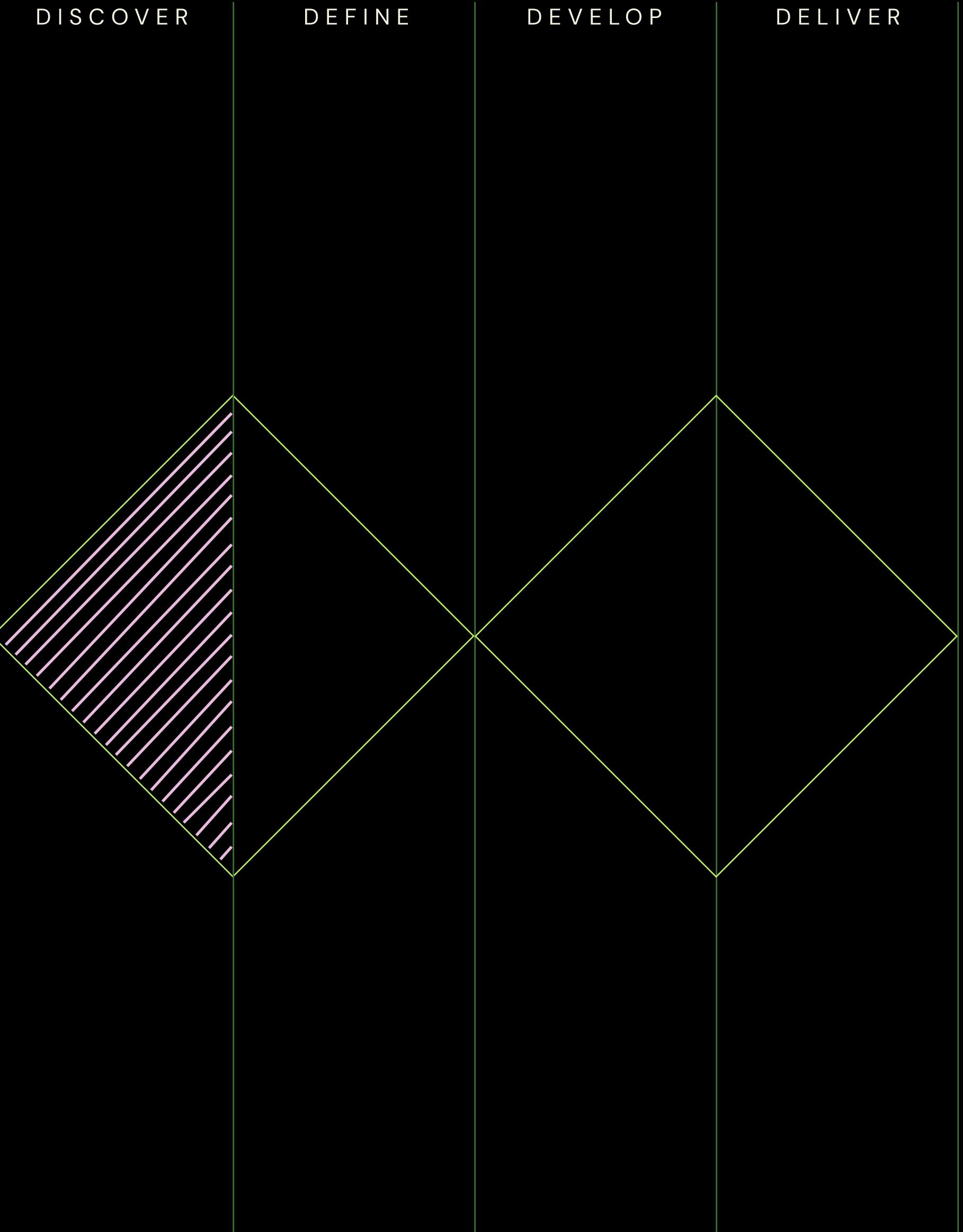
Support sales managers in giving effective 1:1 coaching to reps

Knode's goal was to move beyond backend call scoring and deliver a product that sales managers could rely on in their weekly coaching sessions.



# DISCOVER

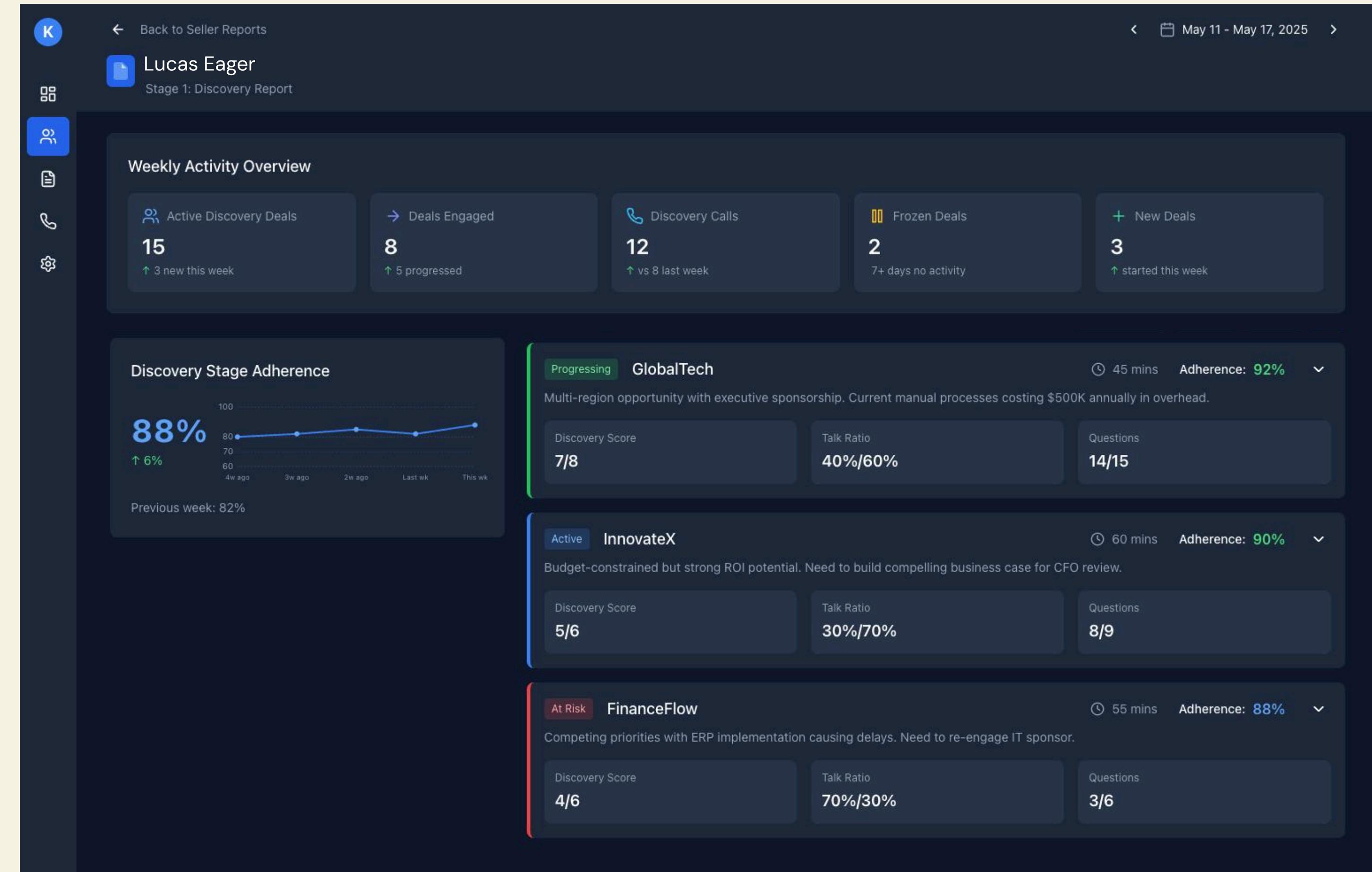
I joined 4 product interviews with sales managers and reps, supporting with questions and observing how they reacted to early AI-generated prototypes that had been created before I joined.



# #Key insights from interviews

The team was testing a dashboard showing raw playbook-adherence scores and call metrics.

- Managers understood the numbers, but struggled to translate them into coaching.
- With limited time, they needed a way to quickly spot where reps required attention before weekly 1:1s.

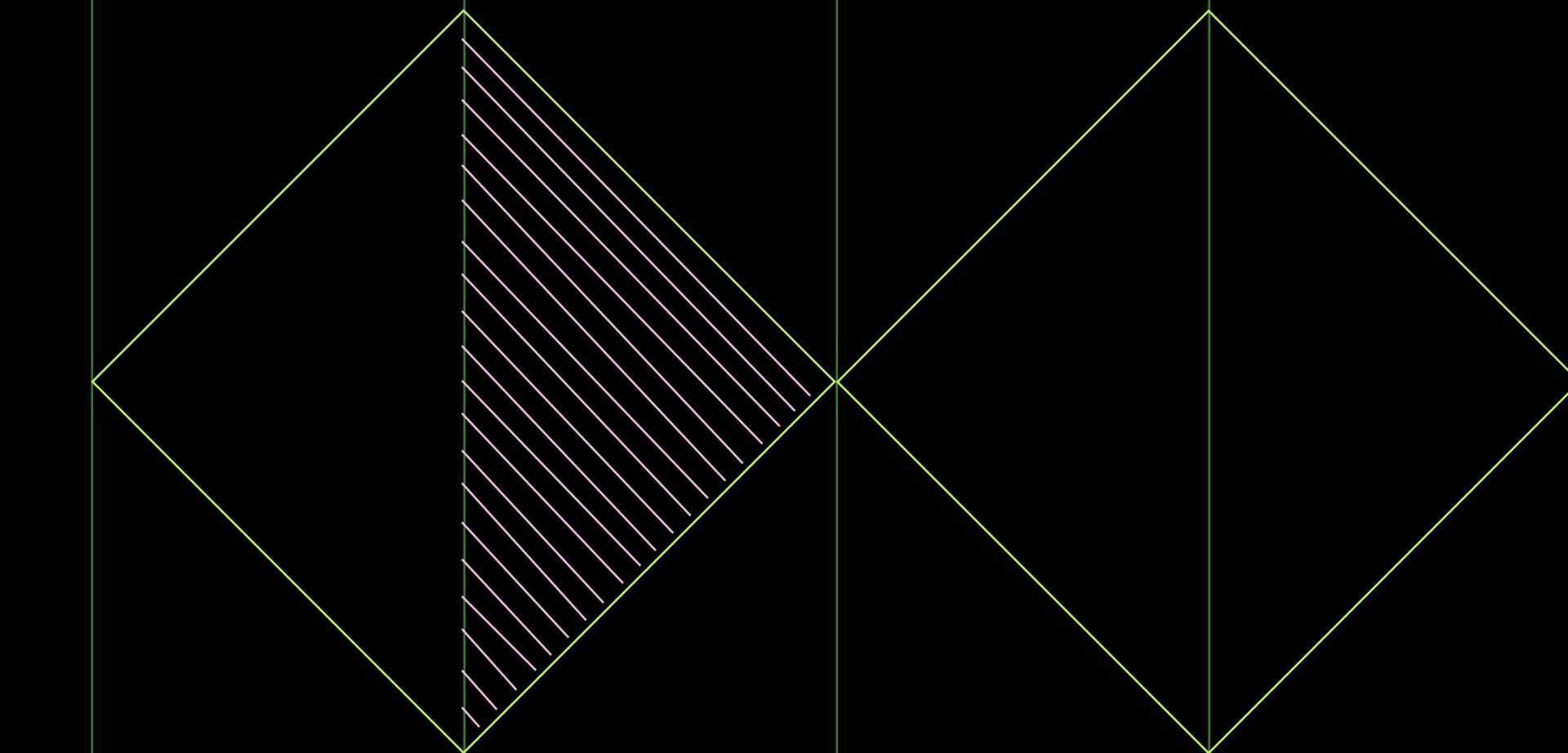


Prototype the team built for testing before I joined.

# DEFINE

I reviewed the interview notes and discovery sessions and distilled them into a single problem statement we could align on as a team.

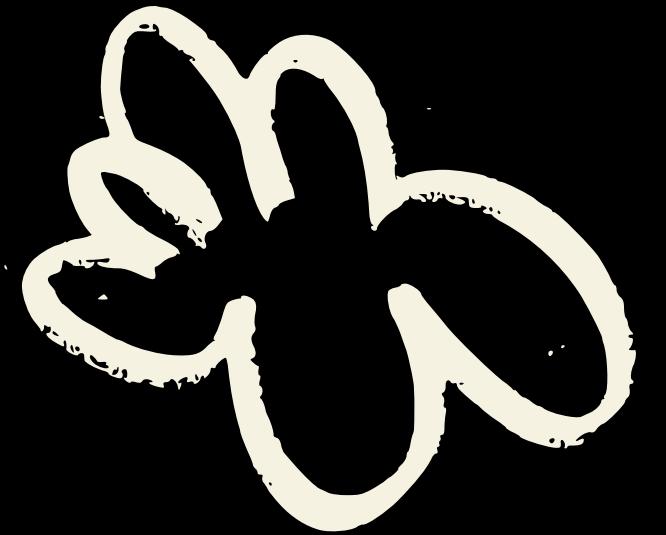
DISCOVER      DEFINE      DEVELOP      DELIVER



# Problem statement

## No clear path from scores to coaching

The AI surfaced long lists of playbook-adherence scores, but managers couldn't connect them to their 1:1 coaching conversations.

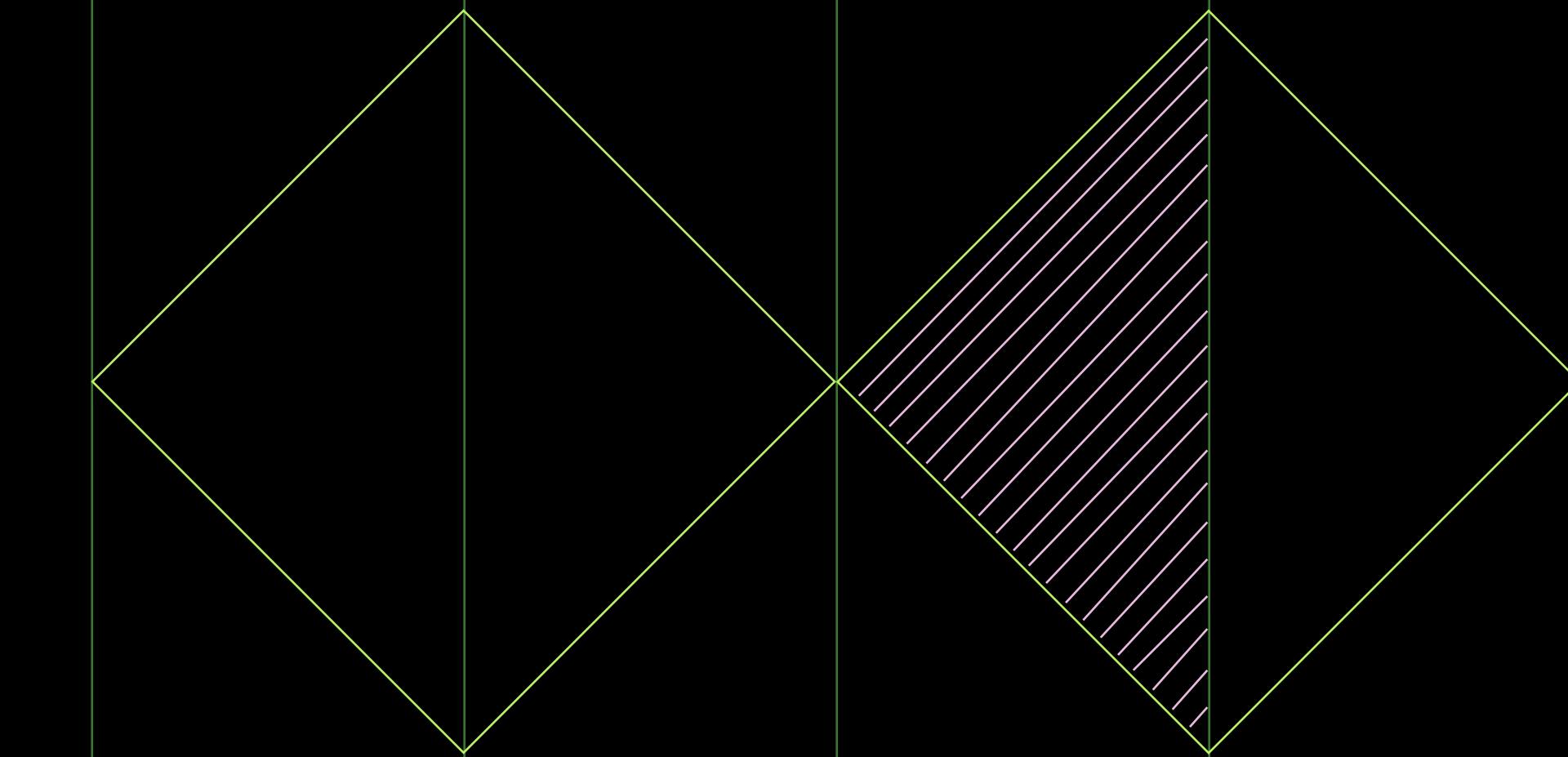


How might we turn the AI playbook scores into something managers can actually use in weekly 1:1s?

# DEVELOP

I translated the problem into prototypes, testing different ways of organizing the AI scores so managers could connect them to their coaching.

DISCOVER      DEFINE      DEVELOP      DELIVER



# Experiment #1 → Iteration #1

# Call-by-call context

I designed a view that broke metrics down by individual calls. Managers could compare across clients and quickly see where a rep needed coaching input.

Metric	Rate	Acme Inc	TechCorp	GlobalCo	InnovateCo
> MEDDICC Summary - Adherence tracking	45% ↗ 25%				
What are your core areas of focus over the next 3-6 months?	25%	✗	✓	✗	✗
How are you planning to achieve those goals?	25%	✗	✓	✗	✗
Are there any potential challenges there that you hope a partner can help with?	25%	✗	✓	✗	✗
> E (Economic buyer) Topics - Adherence tracking	50% ↗ 24%				
Who internally is responsible for approving the implementation of ecommerce or post-purchase tooling?	50%	✓	✓	✗	✗

Prototype showing metrics across calls and within each call.

# #Key insights

*2 live 30-min sessions with sales managers*

## Managers loved the view, but needed to see proof

Managers loved seeing context across calls and criteria – it let them spot coaching needs at a glance with low effort.

But they also needed proof: details showing why a criterion was or wasn't met, so they could fully trust the scores.

# Experiment #1 → Iteration #2

# Context with proof

In the next iteration, I added a side panel that opened when managers clicked any red or green cell in the matrix. It showed the reasoning and transcript proof for that criterion, and allowed them to move through calls directly from the panel.

The screenshot displays a prototype of the AI coaching platform's 'Discovery & Qualification' section. The main interface is a dark-themed dashboard with a grid of performance metrics for 'Acme Inc' and 'TechCorp'. The grid includes questions like 'What are your core areas of focus over the next 3-6 months?' and 'How are you planning to achieve those goals?'. Red and green circular icons indicate progress levels (e.g., 25%, 45%, 50%). A side panel on the right, titled 'TechCorp', provides detailed reasoning and transcript proofs for the 'core business pain' identified. It shows a summary: 'Identify and quantify core business pain' (Successfully Executed) and a reasoning section: 'Successfully identified fuel costs (\$180K/month) as primary pain, quantified at 35% of operating costs vs 28% previously'. Below this are 'Evidence from Transcript' and 'Rubric Criteria' sections with call transcripts from Riccardo Pellegrini and Amanda Foster.

Prototype with side panel showing reasoning and transcript proof.

# #Key insights

*2 live 30-min sessions with sales managers*

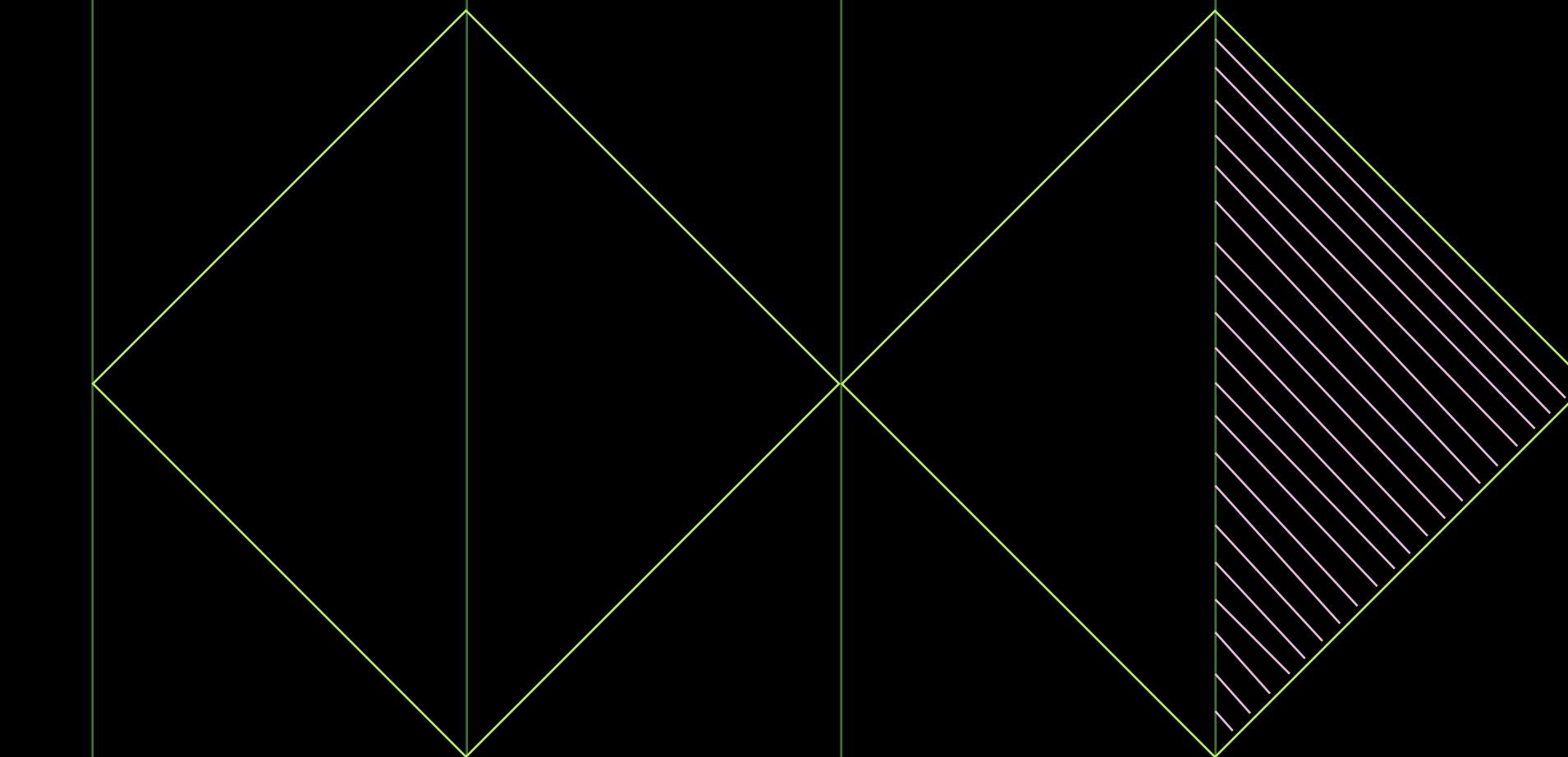
Managers trusted the scores when they saw the proof.

The side panel gave them reasoning and transcript evidence, and they loved being able to click through calls without breaking their workflow.

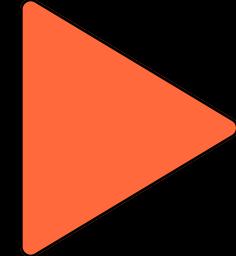
# DELIVER

We transformed a backend scoring system into a coaching product managers wanted to use. With context across calls and proof behind the scores, managers could finally coach effectively using the AI.

DISCOVER      DEFINE      DEVELOP      DELIVER



Before



The screenshot shows a web-based application interface for 'knode'. At the top, there's a dark header bar with the 'knode' logo on the left and a user profile icon on the right. Below the header is a sidebar menu on the left side of the main content area. The sidebar contains the following items:

- Dashboard
- Reports
- Report Configurations
- Users
- Integrations

The main content area has a title 'Report Details' at the top, followed by a back navigation link 'BACK TO REPORTS LIST'. Below this, the report is titled 'Seller Report: Davina Saturne' and was 'Created: April 30th, 2025 11:49 PM'. The report is divided into several sections, each with a green checkmark icon and a title. The first section is 'Areas of Success' which lists three bullet points about seller performance. The second section is 'Objections Status Summary' which lists one bullet point. The third section is 'Closing the Deal Behaviors Summary' which lists two bullet points.

**Report Details**

[← BACK TO REPORTS LIST](#)

**Seller Report: Davina Saturne**

Created: April 30th, 2025 11:49 PM

**Areas of Success**

- Securing next steps: On 2 of 3 calls (66%), Seller scheduled a follow-up call. On 3 of 3 calls (100%), Seller identified concrete next steps.
- Situation discovery: On 3 of 3 calls (100%), Seller asked Situation discovery questions.
- Core message delivery: On 3 of 3 calls (100%), Seller communicated core value messaging (Lead with Efficiency, Boost Revenue, and Seamless Communication).

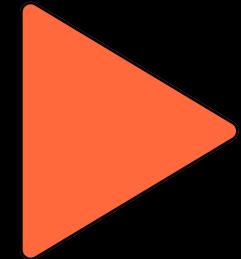
**Objections Status Summary**

- On 3 of 3 calls (100%), Prospects raised one objection: I have to check with my boss.

**Closing the Deal Behaviors Summary**

- On 3 of 3 calls (100%), Seller identified concrete next steps.
- On 2 of 3 calls (66%), Seller scheduled a follow-up call.

Before



The screenshot shows the 'knodel' platform interface. On the left is a sidebar with icons for Dashboard, Reports, Report Configurations, Users, and Integrations. The main area has four sections:

- Discovery & Qualification**
- Demo & Pitch Delivery**
- Objection Handling**
- Additional Insights**

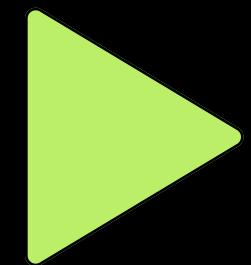
Under **Additional Insights**, there are three tables:

New Objections Identified	Count	Description
Customer Service	1	Prospect asked about customer service.
Data Transfer	1	Prospect asked if Tripleseat helped with transferring data from the old platform.
EventUp Google Rank	1	Prospect googled EventUp during call to see how it ranked.
Edit Access Permissions	1	Prospect brought up the ability of other team members being able to access and edit event documentation.

Feature Request	Count	Description
Inventory calculation	1	Prospect requested inventory management to be able to track items used during events to avoid double booking auxiliary items like step and repeats, projectors, etc.
Tour scheduling feature	1	Prospect mentioned wanting to be able to book tours of the facility as well as rentals of space.

Competitor Name	Count	Description
Jonas	1	Prospect indicated use of Jonas with note of time wasted on manual entry of event creation.

After

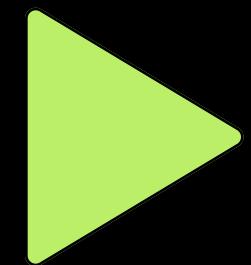


The screenshot shows a user interface for 'Discovery & Qualification' tracking. At the top, it displays 'Lucas Edger' with a progress of '68%' and a '7%' increase. It includes navigation icons for back, forward, and search, along with date filters for 'Aug 17 - Aug 24'. A large green play button icon is positioned on the left side of the main content area.

The main content area is titled 'Discovery & Qualification - Adherence tracking' and shows a table with four columns: Metric, Rate, Acme Inc, TechCorp, GlobalCo, and InnovateCo. The table contains three rows under 'MEDDIICC Summary - Adherence tracking' and one row under 'M (Metrics) Topics - Adherence tracking'. Each row has a progress bar indicating '45%' with a '25%' increase. The table rows contain questions such as 'What are your core areas of focus over the next 3-6 months?' and 'How are you planning to achieve those goals?'. The last row under 'E (Economic buyer) Topics - Adherence tracking' asks 'Who internally is responsible for approving the implementation of ecommerce or post-purchase tooling?'. Each question has a progress bar of '50%' with a '24%' increase.

Metric	Rate	Acme Inc	TechCorp	GlobalCo	InnovateCo
> MEDDIICC Summary - Adherence tracking	45% ↗ 25%				
↳ M (Metrics) Topics - Adherence tracking	45% ↗ 25%				
What are your core areas of focus over the next 3-6 months?	25%	✗	✓	✗	✗
How are you planning to achieve those goals?	25%	✗	✓	✗	✗
Are there any potential challenges there that you hope a partner can help with?	25%	✗	✓	✗	✗
↳ E (Economic buyer) Topics - Adherence tracking	50% ↗ 24%				
Who internally is responsible for approving the implementation of ecommerce or post-purchase tooling?	50%	✓	✓	✗	✗

After



**Lucas Edger 68% ↗ 7%**

Discovery & Qualification - Adherence tracking

Metric	Rate	Acme Inc	TechCorp
> MEDDICC Summary - Adherence tracking	45% ↗ 25%		
↙ M (Metrics) Topics - Adherence tracking	45% ↗ 25%		
What are your core areas of focus over the next 3-6 months?	25%	✗	✓
How are you planning to achieve those goals?	25%	✗	✓
Are there any potential challenges there that you hope a partner can help with?	25%	✗	✓
↙ E (Economic buyer) Topics - Adherence tracking	50% ↗ 24%		
Who internally is responsible for approving the implementation of ecommerce or post-purchase tooling?	50%	✓	✓

Discovery & Qualification

Identify and quantify core business pain

Successfully Executed

**Reasoning**

Successfully identified fuel costs (\$180K/month) as primary pain, quantified at 35% of operating costs vs 28% previously

**Evidence from Transcript**

View in Gong Evidence 1 of 4

Sarah Johnson · 00:01:15

Thanks for taking the time today, Michael and Jennifer. I know how busy you both are. Before we dive in, could you tell me a bit about what prompted you to look at fleet optimization solutions right now?

Michael Torres · 00:01:45

Absolutely. We're seeing fuel costs that are just crushing our margins. We're spending about \$180,000 a month on fuel, and it feels like it's getting worse every quarter.<sup>1</sup>

Sarah Johnson · 00:02:10

That's significant. When you say it's getting worse every quarter, what operational challenges would derail your fleet

# Impact That Transformed Knode.ai

