

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

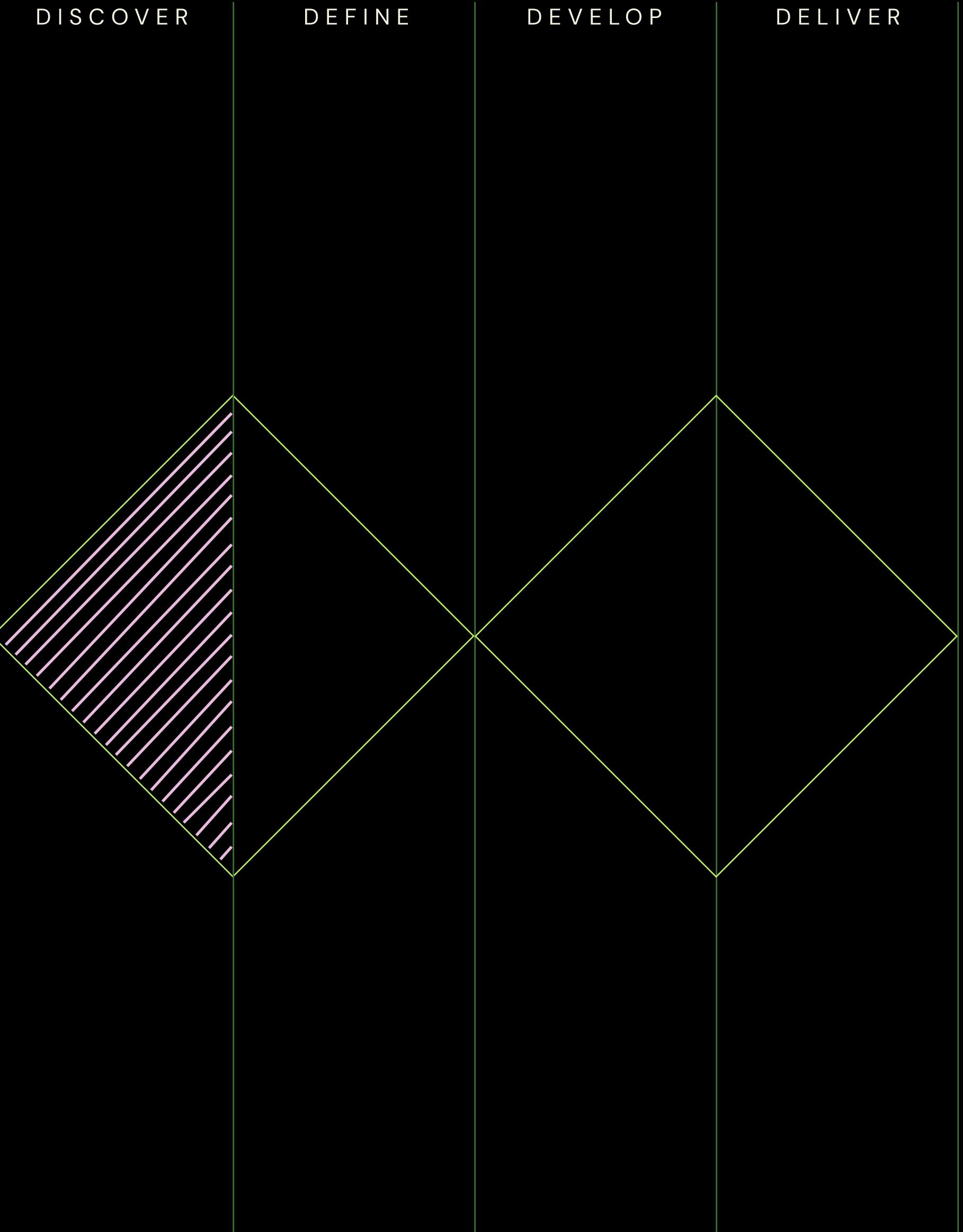
Support sales managers in giving effective 1:1 coaching to reps

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

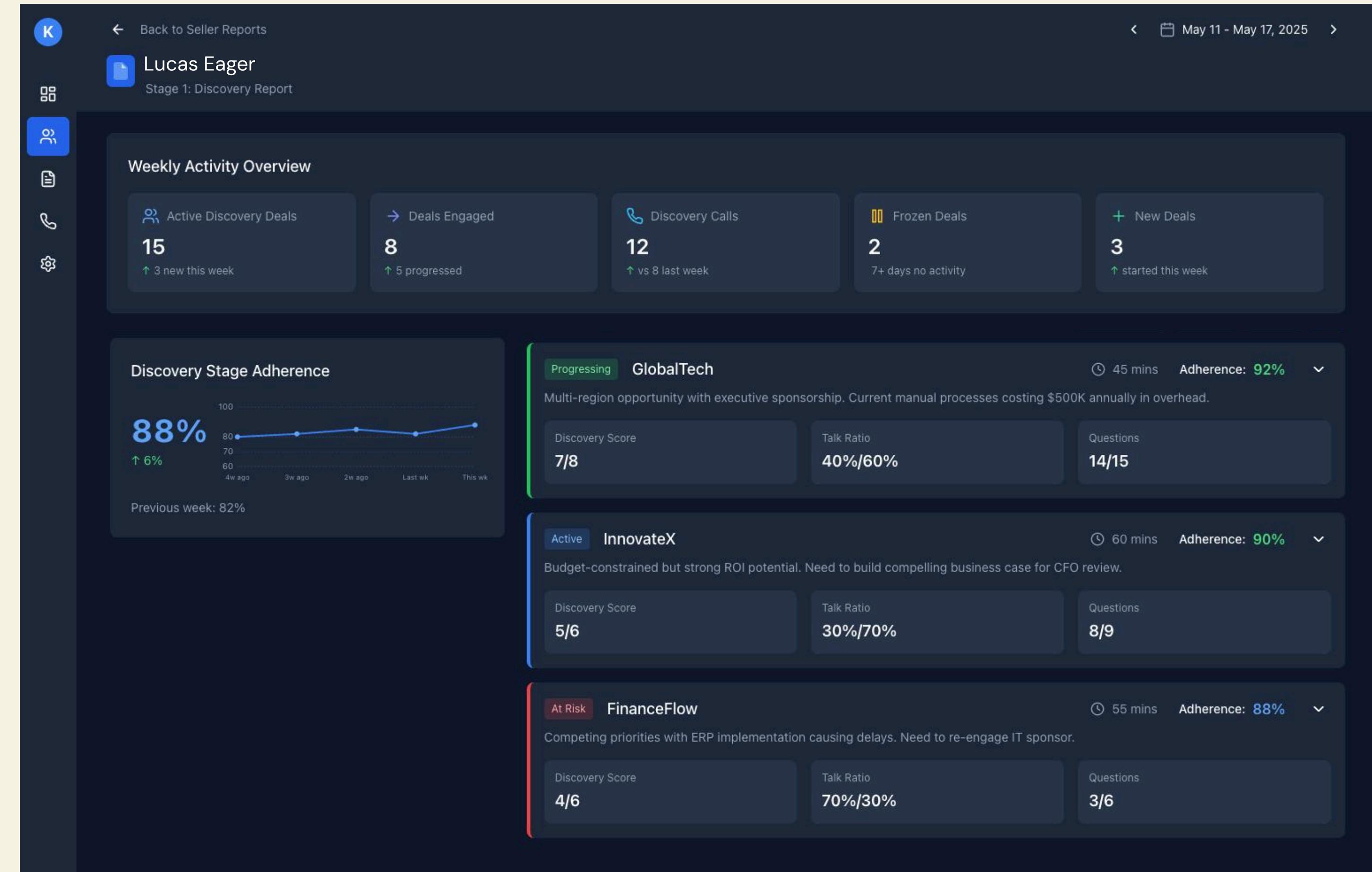
I joined 4 product interviews with sales managers and reps, supporting with questions and observing how they reacted to early AI-generated prototypes that had been created before I joined.



#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.

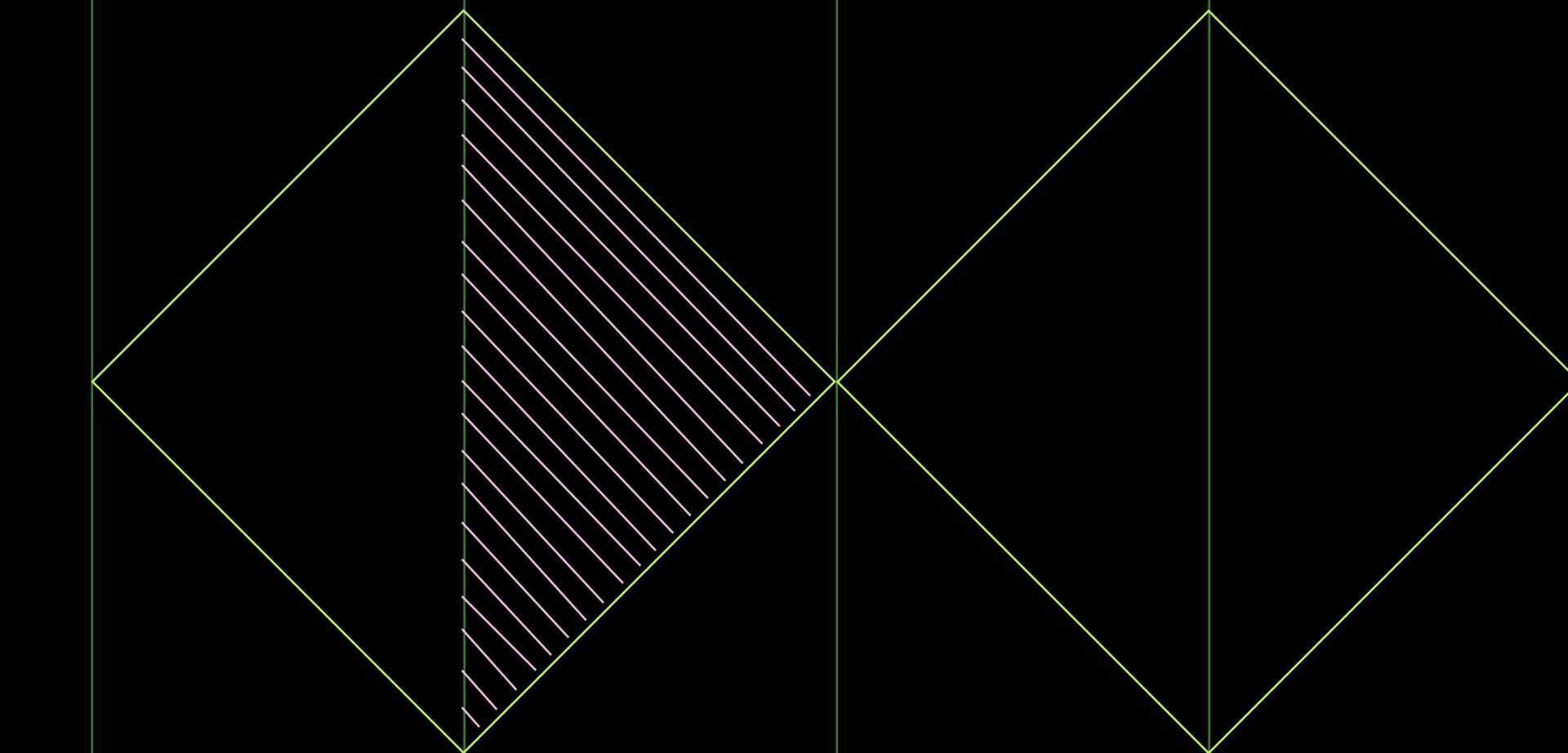


Prototype the team built for testing before I joined.

DEFINE

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

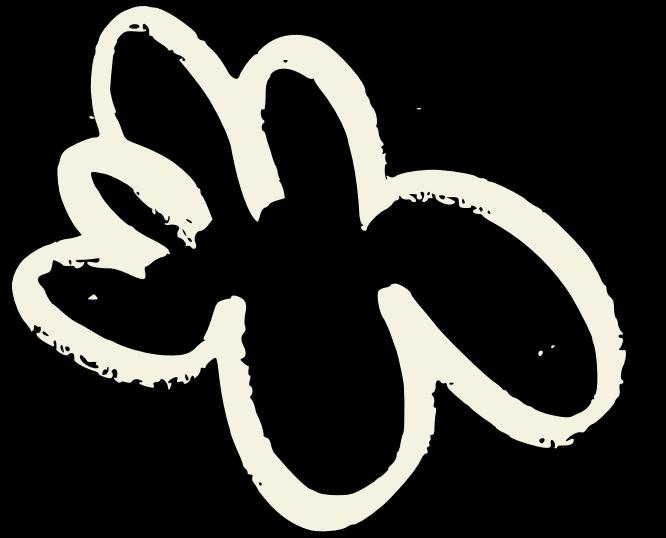
DISCOVER DEFINE DEVELOP DELIVER



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.

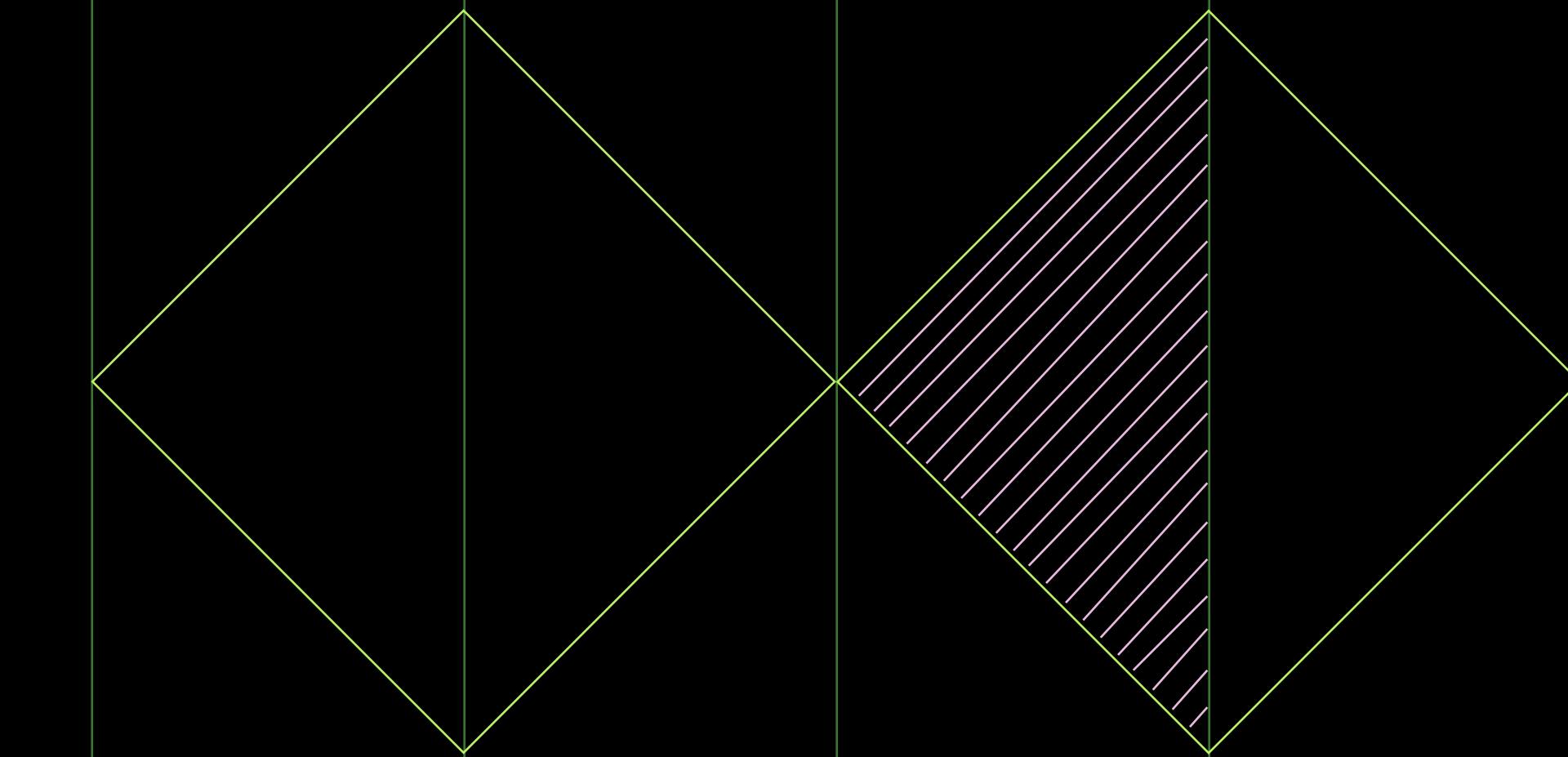


How might we turn the AI playbook scores into something managers can actually use in weekly 1:1s?

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.

The screenshot shows a dark-themed dashboard titled "Discovery & Qualification". It includes a "Discovery & Qualification - Adherence tracking" section with a rate of 45% and a "MEDDICC Summary - Adherence tracking" section with a rate of 45%. Below these are sections for "M (Metrics) Topics - Adherence tracking" and "E (Economic buyer) Topics - Adherence tracking", each with a rate of 25% and 50% respectively. The dashboard compares four clients: Acme Inc, TechCorp, GlobalCo, and InnovateCo. Each client has a row of icons representing different metrics. A legend at the top right indicates that a green checkmark means the metric is met and a red X means it is not.

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%	✗	✓	✗	✗
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 shows a dark-themed application window titled 'Discovery & Qualification'. On the left, there's a navigation sidebar with a tree view: 'Discovery & Qualification' is expanded, showing 'Discovery & Qualification - Adherence tracking' which further branches into 'MEDDICC Summary - Adherence tracking' and 'M (Metrics) Topics - Adherence tracking'. Both branches show a rate of 45% with a green upward arrow and the text '25%'.

The main area displays a 2x2 matrix of questions and responses. The columns are labeled 'Metric' and 'Rate' (with 'Acme Inc' and 'TechCorp' headers). The rows are:

- What are your core areas of focus over the next 3-6 months?** Response: 25% (Red X)
- How are you planning to achieve those goals?** Response: 25% (Red X)
- Are there any potential challenges there that you hope a partner can help with?** Response: 25% (Red X)
- E (Economic buyer) Topics - Adherence tracking** Response: 50% (Green Checkmark)

To the right of the matrix is a light-colored sidebar for 'TechCorp' containing the following sections:

- Identify and quantify core business pain**: Includes a green button labeled 'Successfully Executed'.
- Reasoning**: Text: 'Successfully identified fuel costs (\$180K/month) as primary pain, quantified at 35% of operating costs vs 28% previously'.
- Evidence from Transcript**: A list of transcripts from Gong, with the first one by Riccardo Pellegrini at 00:01:20: 'Cost per mile is crucial for competitive positioning. Can you help me understand your current monthly fuel spend?'. The second transcript by Amanda Foster at 00:01:45: 'We're spending approximately \$125K per month on fuel across our fleet.' is highlighted in green.
- Rubric Criteria**

Prototype with side panel showing reasoning and transcript proof.

#Key insights

2 live 30-min sessions with sales managers

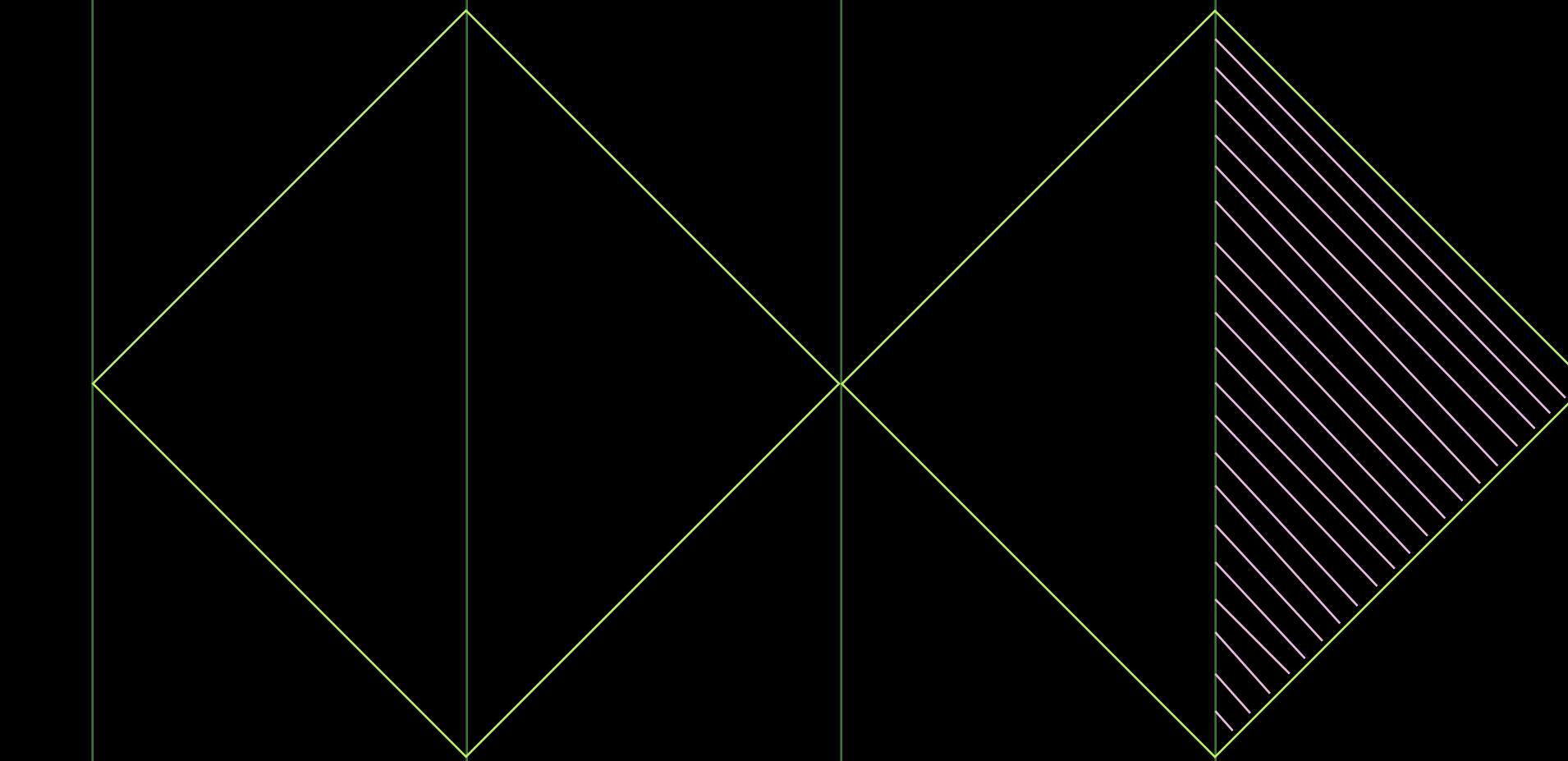
Managers trusted the scores when they saw the proof.

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

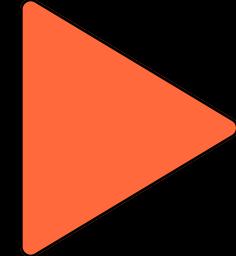
DELIVER

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 the 'Report Details' page for a 'Seller Report: Davina Saturne'. The report was created on April 30th, 2025, at 11:49 PM. The main section, 'Areas of Success', lists three bullet points: 'Securing next steps', 'Situation discovery', and 'Core message delivery', all achieved on 100% of calls. Below this are sections for 'Objections Status Summary' (one objection raised) and 'Closing the Deal Behaviors Summary' (concrete next steps identified on 100% of calls). The interface includes a sidebar with 'Dashboard', 'Reports', 'Report Configurations', 'Users', and 'Integrations' options, and a header with the 'knode' logo and user profile.

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).

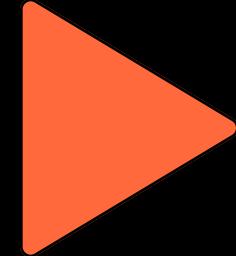
Objections Status Summary

- 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 main sections:

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

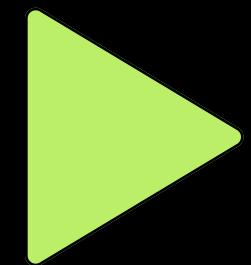
Under **Additional Insights**, there are three tables:

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

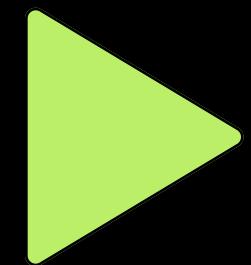


The screenshot shows a user interface for 'Discovery & Qualification' tracking. At the top, it displays 'Lucas Edger' with a progress of '68%' and a '7%' increase. It includes navigation icons for back, forward, and search, along with date filters for 'Aug 17 - Aug 24'. A large green play button icon 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' (Rate: 45%, Increase: 25%) and one row under 'M (Metrics) Topics - Adherence tracking' (Rate: 45%, Increase: 25%). Each row has a question and a status column indicating adherence levels (25% or 50%) with corresponding orange or green checkmarks or X's.

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

After



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%	X	✓
How are you planning to achieve those goals?	25%	X	✓
Are there any potential challenges there that you hope a partner can help with?	25%	X	✓
↙ 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. 1

Sarah Johnson · 00:02:10

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

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