**Business Requirements Document**

AI Agent Development Project

*Generated: October 28, 2025*

# Project Information

**Agent Name:** SalesScribe AI

**Applicable Persona:** Sales Team Members

**Applicable Industry:** Sales

**Session ID:** chat\_1761651852783\_rhsxcx673

**Requested By:** anonymous: anonymous

# Executive Summary

SalesScribe AI is an innovative AI-driven solution designed to enhance the productivity and efficiency of sales team members by providing voice-activated note-taking, seamless data integration, and effective follow-up actions. With a focus on improving the user experience, SalesScribe AI aims to reduce the administrative burden on sales professionals, allowing them to concentrate on building relationships and closing deals.

# Business Context & Objectives

* \*\*Industry Overview\*\*: The sales industry is increasingly relying on technology to streamline processes and enhance productivity. Sales teams are often overwhelmed with administrative tasks that detract from their core responsibilities.
* \*\*Objectives\*\*:
* Enhance productivity by automating note-taking and follow-up actions.
* Integrate with existing CRM and sales tools to centralize data.
* Enable voice activation for hands-free operation to improve user experience.
* Provide a platform for reviewing and editing notes to ensure accuracy.

# Problem Statement

Sales professionals face significant challenges in managing their time effectively due to the following reasons:

* Time-consuming manual note-taking during meetings and calls.
* Difficulty in integrating data from various platforms, leading to fragmented information.
* The need for timely follow-up actions that often get overlooked.
* Inconsistent note quality and retention, leading to loss of critical information.

# User Personas & Journeys

* \*\*User Persona\*\*: Sales Team Members
* \*\*Demographics\*\*: Aged 25-45, tech-savvy, works in various sales roles (e.g., account executive, sales manager).
* \*\*Pain Points\*\*:
* Difficulty in capturing vital information during conversations.
* Inability to quickly access and review notes before meetings.
* Overwhelmed by multiple tools for data management.
* \*\*User Journey\*\*:

1. \*\*Voice Activation\*\*: User activates SalesScribe AI via voice command at the start of a call or meeting.
2. \*\*Note Taking\*\*: The AI listens and transcribes conversations in real-time, capturing key points and action items.
3. \*\*Data Integration\*\*: Automatically syncs notes with existing CRM systems and other sales tools.
4. \*\*Review & Edit\*\*: User receives a summary of notes and can review/edit for clarity and accuracy.
5. \*\*Follow-up Actions\*\*: The AI suggests follow-up actions based on the conversation and integrates them into the user's calendar.

# Functional Requirements

* \*\*Voice Activation\*\*: The ability to start and stop note-taking using voice commands.
* \*\*Real-Time Transcription\*\*: Accurate transcription of conversations with the ability to identify speakers.
* \*\*Data Integration\*\*: Connect seamlessly with popular CRM platforms (e.g., Salesforce, HubSpot) and email systems.
* \*\*Editing Interface\*\*: A user-friendly interface for reviewing and editing transcribed notes.
* \*\*Follow-up Automation\*\*: Ability to set reminders and follow-up actions based on notes.

# Technical Requirements

* \*\*Platform Compatibility\*\*: Must be compatible with various devices (smartphones, tablets, laptops).
* \*\*Cloud Storage\*\*: Utilize secure cloud storage for data retention and backup.
* \*\*APIs for Integration\*\*: Robust APIs for integration with CRM and other sales tools.
* \*\*Natural Language Processing (NLP)\*\*: Implement advanced NLP algorithms for accurate transcription and context understanding.
* \*\*User Authentication\*\*: Secure user authentication mechanisms to protect sensitive data.

# Success Metrics

* \*\*User Adoption Rate\*\*: Percentage of sales team members actively using SalesScribe AI within the first six months.
* \*\*Reduction in Administrative Time\*\*: Measure the decrease in time spent on note-taking and follow-up tasks.
* \*\*Accuracy of Transcriptions\*\*: Track the accuracy percentage of transcriptions compared to manual notes.
* \*\*User Satisfaction\*\*: Collect feedback through surveys to assess user satisfaction and areas for improvement.

# Timeline & Deliverables

* \*\*Phase 1\*\*: Requirements Gathering (Month 1)
* \*\*Phase 2\*\*: Design and Prototyping (Month 2-3)
* \*\*Phase 3\*\*: Development (Month 4-6)
* \*\*Phase 4\*\*: Testing & QA (Month 7)
* \*\*Phase 5\*\*: Launch (Month 8)
* \*\*Deliverables\*\*:
* Functional prototype
* Final product with user documentation
* Training materials for sales teams

# Risks & Mitigation

* \*\*Risk\*\*: Resistance to change from sales team members.
* \*\*Mitigation\*\*: Conduct training sessions and provide incentives for early adopters.
* \*\*Risk\*\*: Integration challenges with existing systems.
* \*\*Mitigation\*\*: Engage with IT teams early in the process to identify potential issues.
* \*\*Risk\*\*: Data security concerns.
* \*\*Mitigation\*\*: Implement strong encryption and compliance with data protection regulations.

# Next Steps

* Conduct stakeholder interviews to refine requirements.
* Assemble a project team with representatives from sales, IT, and product development.
* Create a detailed project plan outlining specific tasks and responsibilities.
* Schedule an initial kickoff meeting to align on objectives and timelines.