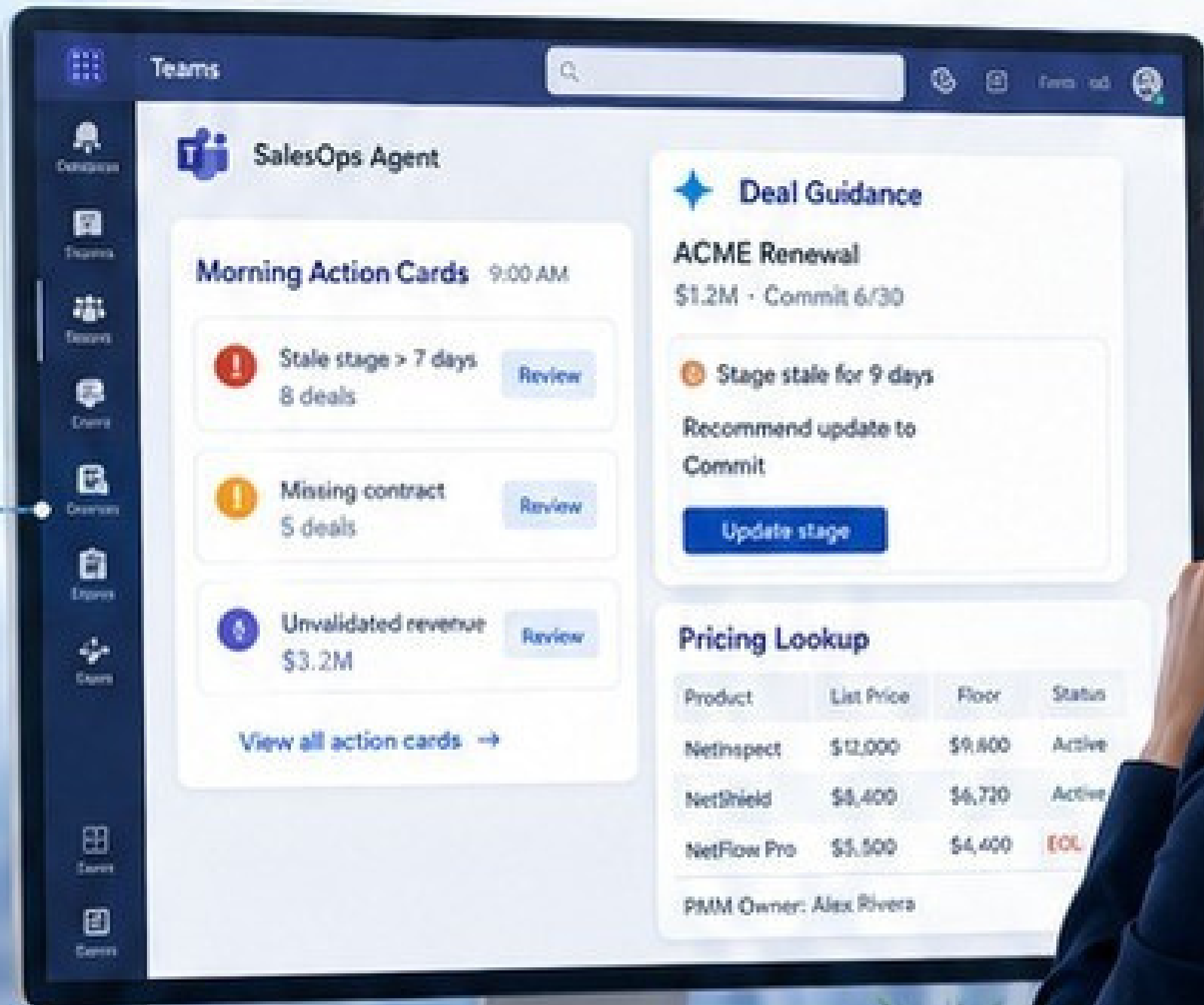


SalesOps Forecast & Pricing Agent

Proactive forecast hygiene and pricing guardrails — delivered where sellers already work



AI-Powered Revenue Operations



< 5 sec

pipeline query or pricing lookup in Teams



Zero

context switches to update a deal



2/day

max action cards — triage prevents fatigue



85%

pipeline stages resolved without an LLM call



The Problem

Reps lose time navigating Salesforce, spreadsheets, and email. Forecast violations go unnoticed. Pricing relies on tribal knowledge. The result is forecast rot, over-discounting, and admin overhead.



What the SalesOps Agent Does

- ✓ Proactive action cards delivered in Teams at 9AM and 1:30PM
- ✓ Surfaces violations: stale stages, missing contracts, unvalidated revenue
- ✓ Live MDM pricing tables with guardrail floors, EOL flags, and PMM owner
- ✓ Inline Salesforce write-back from Teams — 3-turn confirmation safety
- ✓ Draft customer-facing emails post-pricing lookup in one motion



Who Buys It

- VP Sales Operations / Head of Revenue Operations
- CRO / VP Sales concerned with forecast accuracy
- CFO where pricing governance is a priority



Write Safety & Security Architecture

- 🔒 Deterministic-first design for the majority of workflows
- 🔐 HMAC-signed one-time tokens prevent replay attacks on write-backs
- 👤 Per-user PKCE OAuth — no service accounts, no shared credentials
- 🔗 Correlation ID threading + structured audit logs for every interaction
- ⌚ Write-back state expires after 10 minutes — safety by design

Business Outcomes



Seller productivity

Less time in tools, more time selling.



Forecast data quality

Cleaner, more accurate forecast you can trust.



Pricing governance

Consistent pricing with guardrails and visibility.



Operations efficiency

Automate hygiene and reduce manual admin work.



Why Netwoven

Netwoven brings Microsoft integration depth, enterprise-safe architecture, and proven design patterns for building action-oriented revenue and sales operations agents.



Reference build: live MVP at [Synopsys Sales Operations](#) — May 2026

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Microsoft Teams • Salesforce MCP • Snowflake MDM • Azure AD

Executive summary A deterministic-first sales operations agent that brings forecast hygiene, pricing guidance, and safe deal updates into Microsoft Teams. The goal is to reduce seller context switching, improve forecast quality, and enforce pricing guardrails without introducing fragile or opaque automation.	Best-fit situations • Best for Salesforce-centric revenue organizations using Microsoft Teams for daily collaboration. • Most valuable where <u>Sales Ops</u> is spending time on repetitive pricing and pipeline questions. • Requires reliable opportunity, product, and pricing data sources plus agreement on safe write-back scope.
How it works • Teams serves as the front door for action cards, open chat, pricing lookup, and guided updates. • Intent routing and hygiene rules resolve most workflows against <u>Salesforce</u>, MDM/Snowflake, and knowledge sources without full LLM dependence. • Write-backs use confirmation flow, token expiry, and auditable correlation IDs for safety. • Model use is constrained to narrow tasks while business logic follows rules and stays data driven.	Implementation approach • Phase 1 - Forecast hygiene: action cards, rules, and safe inline Salesforce updates. • Phase 2 - Deal planning and pricing: live guardrail lookup, open chat, and email drafting. • Phase 3 - Intelligence and scale: narrative synthesis, analytics, and broader scenario coverage. • Validate seller adoption, latency, data quality, and write-safety controls throughout.
Value and measurement • Key outcomes: less seller admin time, earlier detection of forecast issues, better pricing discipline, and lower Sales Ops manual load. • Measure with time saved per seller interaction, action-card response rate, reduction in stale-stage violations, pricing escalation volume, and deterministic resolution rate.	Operating model and next step Operating rhythm should include rule management, prompt/policy versioning, identity monitoring, analytics on usage and business value, and controlled expansion of pricing and forecast scenarios. Recommended next step: confirm Salesforce objects, pricing/MDM sources, write-back boundaries, and the first pilot seller cohort.