SALES AND REVENUE · AUTONOMOUS AGENT

Win/Loss Analyst Agent

Interviews the rep in Slack when an opportunity closes, saves a coded reason and posts monthly trends.

Clean, comparable win and loss data instead of blank or vague reasons.



3	4	1	1	8
SUBAGENTS	ACTIONS	OBJECTS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Loss interview
Three questions for Closed Lost.

Win interview
Two questions for Closed Won.

Monthly trends
First Monday post.

THE RULES IT FOLLOWS

- Ask at most three questions for Lost and two for Won, then save.
- One reminder after 48 hours without a reply, then stop.
- Monthly post shows counts and amounts with no rep names attached to losses.
- Never change stage or amount.

NOT INCLUDED

- Customer interviews or surveys.
- Call recording analysis and coaching.

WORKS WITH
Works with your team

WHERE IT WORKS
Slack

RUNS ON
Sales Cloud, Agentforce, Slack

BEST FOR
Sales reps, sales managers, revenue operations, product marketing and sales leaders

INDUSTRIES
Cross-industry B2B · Software companies · Manufacturing · Professional services · Financial services · Medical devices · Telecommunications · Distribution

WHAT YOU NEED

- ✓ Your list of loss reasons if different from the default.

Coming soon. Designed in full and built to the same standard as the live agents.

Free scoping: a 60-minute review with an architect.

We map it to your org, your rules and your data, and give you a fixed plan before work starts.

salesforce PARTNER