Sales Playbook

Profile Directory Foundation	**Advice Ally** Foundation	**Comm Compliance** Foundation	**Insight Hub** Email + Slack	**Sales Scout / CRM** Add-Ons

Communication Intelligence Platform | Founder-Led | klearcomm.ai

Version 1.0 | Confidential | For Internal Use Only | Vibrantec Inc., Chicago IL

01 — Company & Product Overview

What Is Klearcomm?

Klearcomm is a Communication Intelligence Platform built by Vibrantec Inc. and headquartered in Chicago, IL. Backed by 20+ years of coaching experience and an MIT-trained engineering team, Klearcomm solves one of the most expensive and invisible problems inside every organization: miscommunication.

The issue isn't that people lack intelligence or effort. It's that every person communicates and processes information differently — and most teams have no system for bridging those differences in real time. Personality frameworks like DISC, MBTI, and Predictive Index have tried to solve this for decades, but they've always stumbled at the same bottleneck: application. You can know someone's personality type and still have no idea what to say to them right now, in this email, in this meeting, in this deal.

Klearcomm closes that gap. It turns behavioral science into live, in-the-moment communication guidance embedded directly inside the tools your team uses every day — from email and Slack to CRM and live video calls.

The Problem in Numbers

$1.2 Trillion	Annual cost of poor communication to US businesses (Grammarly/Harris Poll)
20–30%	Of team time spent clarifying miscommunications — even a 10% reduction yields massive productivity gains
5–10x	Typical ROI on sales enablement investment — Klearcomm's ROI model shows 0.25% conversion lift on meaningful volume = millions in annual revenue
Day 1	When the knowledge-vs-application gap starts costing money — DISC training is forgotten within weeks; Klearcomm is active in every interaction forever

The Klearcomm Platform Architecture

Klearcomm is a layered platform. The Foundation features are prerequisites that every other feature depends on. They establish the personality data, the application engine, and the governance layer. The Insight Hub is where that intelligence surfaces in daily tools. Add-On Modules extend the platform into high-value sales and CRM use cases.

FOUNDATION LAYER — Prerequisite for All Features

Profile Directory	Advice Ally	Communication Compliance
Digital personality profiles for every team member with DISC-based dos & don'ts — the master record the whole platform references.	Real-time AI guidance for live conversations, texts, and casual interactions — the feature that solves the application bottleneck every personality tool struggles with.	Prevents undesirable or off-brand emails from being sent by employees — governance layer that protects company communication quality at scale.

INSIGHT HUB — Where Klearcomm Lives in Your Daily Tools

Email Plugin	Slack Plugin
Outlook & Gmail. Real-time tone, language, and pacing suggestions as you compose — adapts every message to the recipient's personality before you hit send.	Communication style guidance for internal DMs and team channels. Reduces friction, misread tone, and escalation in day-to-day collaboration.

ADD-ON MODULES — Sales & Revenue Acceleration

Sales Scout	CRM Codex
Generates personality profiles for external prospects from LinkedIn — without any engagement from that person. Tells reps how to open, pitch, and follow up before the first interaction.	Salesforce & HubSpot integration. Personality profiles and real-time communication guidance appear directly inside CRM contact records, deal views, and meeting prep screens.

How the Sale Typically Flows

Because Klearcomm is founder-led and consultative, the sale sequence matters. Lead with the foundation — specifically the Profile Directory and Advice Ally — because these resonate with all three buyer types (CEO, HR, Sales VP) and establish the platform's core value before introducing the sales-specific add-ons.

Step 1: Lead with the pain	Open with the miscommunication cost story and the 'knowing vs. doing' gap that every personality tool fails at. This lands with CEOs (culture and productivity), HR (training ROI and retention), and Sales VPs (close rates and ramp time) equally.
Step 2: Show the foundation	Demo Profile Directory and Advice Ally first. These are the most immediately tangible features — seeing a colleague's dos and don'ts and getting real-time Advice Ally guidance creates an instant 'aha' moment for any buyer.
Step 3: Layer in Insight Hub	Once the concept is clear, show how it lives inside Outlook/Gmail and Slack. This answers the adoption question before they ask it — it's already in the tools they use.
Step 4: Introduce the add-ons	For Sales VPs, introduce Sales Scout and CRM Codex as the revenue acceleration layer on top of the foundation. Frame them as 'once your team is using the platform internally, these are how you point that intelligence at your pipeline.'
Step 5: Right-size the entry point	Most deals start with a team pilot. Give the founder the option to start focused — 5–10 users, foundation features only — and expand from there. Don't oversell the full platform on deal one.

Key Differentiators

Closes the Application Bottleneck	Advice Ally is the feature no competitor has — real-time guidance for live conversations, texts, and casual interactions. This is the exact gap DISC training falls into: you learn it, then immediately forget to apply it when it matters.
Works with Any Assessment	DISC, MBTI, Predictive Index — Klearcomm ingests all of them. Teams don't need to abandon prior investments; Klearcomm makes existing data actionable rather than obsolete.
Communication Compliance is Unique	No competitor offers governance-layer email compliance tied to personality science. This is a standout feature for CEOs and HR leaders worried about company-wide communication quality and brand risk.
Built-In, Not Bolted-On	The Insight Hub lives inside Outlook, Gmail, and Slack — not a separate app. Adoption follows naturally because the guidance appears exactly where communication happens.
Internal + External in One Platform	Most tools are either internal (team dynamics) or external (sales prospecting). Klearcomm covers both, making it a company-wide platform rather than a departmental point solution.

Pricing Tiers

Starter	$49/mo per user (annual)	Individuals & small teams	Profile Directory, Advice Ally basics, Gmail/Outlook plugin, entry-level analytics
Professional	Custom — Let's Talk	Growing sales, HR, or ops teams (15–100 users)	Full Foundation Layer, Insight Hub (Email + Slack), Sales Scout, enhanced analytics, CRM Codex
Enterprise	Custom — Let's Talk	Org-wide deployment, 100+ users	All features, Communication Compliance, custom playbooks, dedicated CSM, enterprise security, company-wide analytics

02 — ICP & Persona Cards — Four Verticals, Three Buyer Roles Each

Klearcomm's ICP is mid-market B2B companies (100–3,000 employees) across four priority verticals where communication quality directly impacts revenue performance, employee retention, and company culture. Within each vertical, there are three distinct buyer entry points: the CEO, the HR / People leader, and the Sales VP / Director. Each role has different pain, different urgency, and a different path to value — but all three are served by the same platform.

CEO / President

B2B Industrial Manufacturer or Distributor | 250–3,000 employees

Pain Points

- Cross-functional friction between sales, engineering, and ops teams creates costly project delays and miscommunication
- Leadership team has strong technical depth but inconsistent communication skills — meetings drag, decisions stall
- Customer-facing staff communicate well with familiar buyers but struggle with new buyer types (private equity owners, procurement teams, new-to-industry contacts)
- Succession planning reveals that the company's communication culture lives in the founder's head, not in any system

Goals

- Build a communication infrastructure that outlasts any single leader
- Reduce internal friction costs — fewer misunderstood emails, fewer re-works, faster cross-team alignment
- Prepare the leadership team to communicate effectively through M&A, ownership changes, or rapid growth

Buying Triggers

- Turnover spike prompting a culture or engagement initiative
- Board or investor pressure to demonstrate people and culture investment
- New executive (CEO, COO, CHRO) building their leadership stack from scratch
- Expanding into a new market or acquiring a regional agency

How They Buy

Visionary, fast-moving. Buys on culture and people ROI more than feature specs. Wants to know the 'why' behind Klearcomm before the 'what.' Decision is fast when they see it — often the same call. Budget authority is absolute.

Top Objections

- We already do DISC training at our annual kickoff
- Is this really measurable?
- Our managers are experienced — they know how to lead people

HR Director / VP of People

Regional or National Insurance Carrier | 300–2,000 employees

Pain Points

- Personality assessments (DISC, MBTI) purchased and run but never effectively embedded in daily work
- New agent ramp time averaging 6–12 months — most of it is learning to read clients, not the product
- Post-training adoption collapses within weeks — knowledge gained but never applied
- Managers give subjective feedback; no data-driven framework for coaching communication

Goals

- Make the personality data the company has already invested in actually useful day-to-day
- Build a structured, scalable onboarding program that accelerates agent communication skills from day one
- Give managers an objective coaching tool that reduces guesswork in performance conversations

Buying Triggers

- Annual review of training spend revealing low post-training behavior change
- New HRIS or L&D platform rollout — appetite for adjacent tools that extend its value
- Retention initiative after losing key agents to competitors
- Request from Sales VP to help new agents ramp faster

How They Buy

Thorough, consensus-oriented buyer. Will want to validate the science and run it by the VP of Sales before recommending up. Champion role — rarely the final approver. Needs clear before/after story for the training ROI conversation.

Top Objections

- We already paid for DISC training this year
- How do we measure behavior change?
- Our managers won't use another system

VP of Sales / Director of Sales Training

Insurance Carrier or Multi-Line Agency | 200–2,000 employees

Pain Points

- Agents use the same pitch script regardless of buyer personality — analytical buyers disengage, relationship buyers feel rushed
- Top producers close 3–4x more than average agents with the same leads — and nobody knows exactly why
- Cold outreach response rates are flat despite investment in scripts, training, and sequencing tools
- Lost commercial lines deals trace back to communication mismatch, not product or pricing

Goals

- Close the performance gap between top producers and the rest of the team
- Improve outreach response rates and lead-to-quote conversion through personalized communication
- Give every agent the instincts of a top producer — without requiring years of experience to develop them

Buying Triggers

- Q1 pipeline review showing flat or declining conversion despite good lead volume
- New CRM implementation creating appetite for adjacent enablement tools
- Competitive pressure from carriers or agencies with more sophisticated sales processes
- Sales kickoff or mid-year training cycle where new tools can be introduced

How They Buy

Results-oriented, impatient with process. Wants to see a demo on real use cases — not a methodology overview. Champion for Sales Scout and CRM Codex add-ons. Will push for a fast pilot to see numbers. Decision cycle: 14–45 days.

Top Objections

- Our agents are independent — they won't follow a script or a tool
- Show me the data on conversion improvement
- We already use [Crystal/another tool]

CEO / President

B2B Industrial Manufacturer or Distributor | 250–3,000 employees

Pain Points

- Cross-functional friction between sales, engineering, and ops teams creates costly project delays and miscommunication
- Leadership team has strong technical depth but inconsistent communication skills — meetings drag, decisions stall
- Customer-facing staff communicate well with familiar buyers but struggle with new buyer types (private equity owners, procurement teams, new-to-industry contacts)
- Succession planning reveals that the company's communication culture lives in the founder's head, not in any system

Goals

- Build a communication infrastructure that outlasts any single leader
- Reduce internal friction costs — fewer misunderstood emails, fewer re-works, faster cross-team alignment
- Prepare the leadership team to communicate effectively through M&A, ownership changes, or rapid growth

Buying Triggers

- Private equity acquisition or investment bringing new ownership communication expectations
- Leadership team expansion or restructuring requiring culture alignment
- Company hitting a growth ceiling that feels like a people or communication problem
- Personal experience with a costly miscommunication — lost deal, project failure, key hire departure

How They Buy

Pragmatic, ROI-focused. Will engage if you can connect Klearcomm directly to a business outcome they've personally experienced. Not interested in theory — wants to see it work on his team. Often the fastest close of the three roles when the story lands.

Top Objections

- We're a manufacturing company — we hire engineers, not communicators
- Prove this to me with data
- Our people are too busy for another training initiative

HR / People Operations Leader

B2B Manufacturer | 300–3,000 employees

Pain Points

- High blue-collar and mid-management turnover often driven by manager communication failures — not compensation
- New hire onboarding doesn't address communication style — team friction begins on day one
- Personality tools used in hiring (PI, DISC) produce profiles that go into a folder and are never referenced again
- HR is being asked to solve culture and retention problems with limited tools and even more limited manager buy-in

Goals

- Make personality data purchased for hiring actually useful in day-to-day management
- Give front-line managers a practical framework for coaching and communicating with different personality types
- Reduce manager-driven turnover by improving how supervisors connect with their teams

Buying Triggers

- Exit interview data showing 'management communication' as a top departure reason
- New HRIS rollout with budget to complement it with development tools
- Safety incident or HR complaint traced back to a miscommunication
- Culture survey results showing low scores on 'my manager communicates clearly'

How They Buy

Detail-oriented, evidence-driven. Wants to understand the methodology, the science, and the implementation plan before moving forward. Will be thorough — this is a positive sign. Needs the CEO's implicit endorsement to move forward with budget.

Top Objections

- Our managers are skeptical of 'soft skills' tools
- How does this work for a manufacturing floor environment — not just office workers?
- We don't have budget for this outside of our LMS

VP of Sales / National Sales Director

B2B Industrial Manufacturer | 250–3,000 employees

Pain Points

- Technical sales reps are product experts but personality-blind — pitch the same way to a CFO and a plant manager
- Long, complex sales cycles with multiple stakeholders: each requires a completely different communication approach
- Lost strategic accounts traced to style mismatch — the competitor had a less qualified product but communicated better
- Difficult to coach reps on communication in a structured way — feedback is anecdotal and inconsistent

Goals

- Help technical reps adapt their communication to non-technical buyers without losing their credibility
- Improve win rates on multi-stakeholder accounts by enabling personality-adapted communication at every level
- Build a repeatable communication framework the whole team can execute consistently

Buying Triggers

- Post-mortem on a lost strategic account reveals communication, not capability, was the issue
- Moving sales model from transactional to consultative — new buyer types require new communication approaches
- New CRM or sales engagement platform creating appetite for complementary tools
- New VP of Sales hired with a mandate to professionalize the team's sales motion

How They Buy

Results-first buyer. Lead with the competitive loss story and the consultative selling angle. Sales Scout and CRM Codex are the features that close this persona — show them in the demo. Will want a team pilot before a full commitment.

Top Objections

- Our reps sell on relationships — this feels transactional
- We've tried tools like this before and adoption died in month 2
- How does this work inside Salesforce?

CEO / Founder

B2B Services: Staffing, IT Services, Consulting, Facilities, Logistics | 150–2,000 employees

Pain Points

- Service businesses live and die on relationships — but communication quality across the team is wildly inconsistent
- Proposals get ghosted after strong discovery calls — the communication style that wins the room doesn't always translate to written follow-up
- Competitive differentiation is hard to articulate — services companies often win or lose on feel, not features
- Scaling a services business requires systematizing what the founder does intuitively — and communication is always the hardest thing to transfer

Goals

- Systematize the founder's communication instincts so the whole team can execute at a higher level
- Build a differentiated approach to client communication that becomes a competitive advantage
- Reduce the disconnect between strong discovery calls and weak written follow-through

Buying Triggers

- Losing a large RFP they expected to win — post-mortem reveals communication, not capability, was the difference
- Team growth requiring delegation of client communication beyond the founder
- RevOps or Sales Ops hire creating appetite for a structured toolstack
- Preparing for a PE raise or M&A conversation that requires demonstrating operational maturity

How They Buy

Entrepreneurial, fast-moving. Buys on differentiation and competitive advantage. If you can make them feel like this gives them an edge competitors don't have, the deal moves fast. Low tolerance for complexity — keep the pitch tight and the value story clear.

Top Objections

- Our team already builds strong client relationships
- We're a services company — AI tools feel impersonal
- I've tried personality tools before and they didn't stick

HR / Talent & Culture Leader

B2B Services Firm | 200–2,000 employees

Pain Points

- Services firms have high turnover — and a disproportionate amount of it is driven by internal communication breakdowns
- Consultants and client-facing staff are skilled at their discipline but not always equipped for the interpersonal demands of the role
- Onboarding new hires into the firm's communication culture takes months — and often never fully happens
- Personality tools exist in the company but are used inconsistently — some managers swear by DISC; most ignore it

Goals

- Embed a common communication language and framework across the entire firm
- Improve new hire time-to-effectiveness by giving them tools to read and adapt to clients and colleagues from day one
- Reduce internal conflict and miscommunication-related turnover

Buying Triggers

- High-cost senior departure traced to a relationship breakdown with a key client or colleague
- Rapid hiring growth requiring fast onboarding of new communicators
- Culture survey or engagement data showing low scores on internal communication clarity
- HR budget review with line items for DISC or MBTI that aren't showing ROI

How They Buy

Process-oriented, evidence-driven. Will do their homework. Needs a clear implementation plan and a framework for measuring behavioral change. Profile Directory and Advice Ally are the primary features for this persona — lead with them.

Top Objections

- We already have DISC data — what does this add?
- Our consultants are too busy to engage with another tool
- How do we know this actually changes behavior vs. just providing information?

VP of Sales / Director of Business Development

B2B Services Firm | 150–2,000 employees

Pain Points

- Proposals get ghosted — the discovery call goes great and then silence
- Multi-stakeholder RFPs require managing analytical procurement teams, visionary C-suite contacts, and operational champions — all in different registers
- Reps use the same proposal tone and follow-up cadence regardless of who they're writing to
- Sales leaders can't objectively diagnose why some reps consistently out-close others with identical service offerings

Goals

- Win more RFPs by aligning proposal tone and written follow-up to each evaluator's communication style
- Accelerate pipeline velocity by communicating in the way each stakeholder makes decisions
- Give every rep on the team the ability to multi-thread accounts as effectively as the best closers

Buying Triggers

- Lost a major RFP on style, not substance
- New VP of Sales building a structured sales process and toolstack
- Moving upmarket from SMB to mid-market — new buyer types requiring more sophisticated communication approaches
- RevOps or Sales Ops leader benchmarking sales enablement tools

How They Buy

Results-oriented, will push for proof. Show CRM Codex and Sales Scout in the demo. Lead with the RFP ghosting story — it will land immediately. Wants a pilot before a full commitment, and wants to see usage data at the 30-day mark.

Top Objections

- We already have a sales methodology — how does this layer in?
- Our reps are relationship sellers — they'll resist a tool that tells them how to communicate
- We need this to work inside HubSpot/Salesforce — can it?

MORTGAGE / REAL ESTATE | VERTICAL

CEO / Owner / Managing Partner

Mortgage Lender, Real Estate Brokerage, or Commercial RE Firm | 100–1,000 employees

Pain Points

- In a rate-sensitive market, conversion efficiency is everything — and the gap between top producers and everyone else is almost entirely communication-driven
- Brand reputation is built or destroyed in individual agent conversations — there's no consistent communication standard across the team
- Recruiting top agents requires offering better tools and culture than competitors — most brokerages offer the same splits, not differentiated support
- Growth plateau that feels like a talent problem but is actually a communication systems problem

Goals

- Build a communication culture that attracts and retains top-producing agents
- Create a production floor or branch where every agent communicates at the level of the best producers
- Differentiate the brokerage or lending operation through demonstrably better agent communication quality

Buying Triggers

- Rate environment tightening, making conversion efficiency more important than ever
- Recruiting push requiring a compelling value proposition beyond compensation
- Scaling from a founder-run shop to a team-based model requiring communication systematization
- Personal experience losing a deal or a referral relationship due to a communication failure

How They Buy

High energy, relationship-first buyer. Leads with instinct, not analysis. Make the emotional case before the ROI case — connect Klearcomm to their identity as a communicator and leader. If they feel it, they'll buy fast. Decision cycle: 1–3 conversations.

Top Objections

- Real estate is all about personality — you can't teach that
- My top agents already have great communication instincts
- Another tool is the last thing my agents need

HR / Training & Development Director

Mortgage Lender or Large Brokerage | 200–1,000 employees

Pain Points

- Agent onboarding is focused on compliance and product — communication skills are left to develop on the job, which takes years
- Mandatory DISC or personality training completed at hire but never reinforced or applied in daily work
- Manager coaching is inconsistent — some branch managers are skilled communicators, others aren't, and there's no standard
- High new-agent washout in the first 12 months, often driven by communication confidence more than product knowledge

Goals

- Build a structured communication development program that accelerates new agent effectiveness
- Create a consistent coaching framework for branch managers based on personality science, not gut feel
- Improve new-agent retention through earlier confidence in client communication

Buying Triggers

- New agent class starting — appetite for onboarding tools
- 12-month washout data being reviewed at leadership level
- Training budget renewal cycle where prior tools are being evaluated
- Compliance training initiative that surfaces an opportunity to add communication training alongside it

How They Buy

Methodical, process-oriented. Needs to understand how Klearcomm integrates with existing training architecture. Profile Directory and Advice Ally are the entry point features. Will champion upward if given a clear success story from a comparable firm.

Top Objections

- Our compliance training calendar is already full
- Agents need product knowledge first — communication is secondary
- How do we roll this out to 200 agents consistently?

VP of Sales / Director of Production

Mortgage Lender or RE Brokerage | 100–1,000 employees

Pain Points

- Lead-to-application and contact-to-conversion rates are flat despite good lead volume and quality
- Top LOs convert 3–5x more leads than average — the gap is entirely in how they communicate, not what they know
- Generic follow-up sequences and email templates produce low engagement with borrowers of different personalities
- Rate environment means every lead is precious — the cost of a communication miss is higher than ever

Goals

- Close the conversion gap between top producers and the rest of the team
- Personalize outreach and follow-up at scale without making every LO a copywriter
- Improve response rates to initial outreach by adapting tone and language to each borrower's communication style

Buying Triggers

- Q-over-Q conversion decline despite stable lead volume
- New CRM or dialer being rolled out — appetite for complementary tools
- Sales kickoff where leadership is looking for a differentiated training investment
- Competitive pressure from lenders who are closing faster and communicating more personally

How They Buy

Fast-moving, impatient buyer. Lead with Sales Scout — showing how a prospect profile is built from LinkedIn in seconds will land immediately. Demo the email plugin with a real borrower scenario. Wants a 30-day pilot with conversion data at the end.

Top Objections

- This rate environment doesn't leave room for tool experiments
- Our LOs build relationships the old-fashioned way — they won't adopt this
- How does this work with our CRM?

03 — Outbound Messaging Library

As a founder-led, consultative motion, outbound should feel personal — not templated. Use these as starting points and adapt the first two lines to something specific about the company, their LinkedIn, or a recent trigger event. The subject lines and angles below are organized by vertical and buyer role.

Subject Lines — By Vertical & Buyer Role

Insurance	"Why your top agents outclose the others by 4x"	"Getting real ROI from the DISC data you already have"	"The communication gap costing your agents commercial lines deals"
Manufacturing	"The communication cost no one budgets for"	"What exit interviews keep telling you (and the fix)"	"Why your reps lose deals they should win"
Consumer Services	"What separates proposal winners from runners-up"	"The onboarding step most services firms skip"	"Why great discovery calls end in ghosted proposals"
Mortgage / RE	"The only edge that matters in this rate environment"	"What your 12-month agent washout rate is telling you"	"How top LOs convert more without more leads"

CEO — INSURANCE (EMOTIONAL + CULTURE ANGLE)

Subject: Why your top agents outclose the others by 4x

Hi [First Name],

Your top agents already do something the rest of your team doesn't — they read the room and adapt. Analytical buyers get data. Relationship buyers get warmth. They do it instinctively. Everyone else uses the same approach with everyone.

Klearcomm gives every agent on your team that same instinct — in real time, inside Outlook and Salesforce, from day one.

Built on 20+ years of communication coaching and an MIT engineering team. Takes less than a day to deploy.

Worth 20 minutes to see how it works for an insurance team?

[Your Name]

HR — MANUFACTURING (TRAINING ROI ANGLE)

Subject: Getting real ROI from the personality data you already have

Hi [First Name],

Most manufacturers have DISC or PI data sitting in a folder somewhere — used once at hire and never touched again.

Klearcomm changes that. It takes the assessment data your company has already invested in and makes it actionable every day — inside your managers' email, inside Slack, and inside whatever CRM your sales team uses.

The result: managers who coach with data, not gut feel. Reps who adapt their communication to each buyer type automatically. And personality science that actually sticks past week two.

Happy to show you what this looks like for a manufacturing team. 20 minutes?

[Your Name]

VP OF SALES — CONSUMER SERVICES (GHOSTED PROPOSAL ANGLE)

Subject: Why great discovery calls end in ghosted proposals

Hi [First Name],

Here's a pattern we see constantly in B2B services: strong discovery call, clear fit, send the proposal — then silence.

Usually it's not the product or the price. It's that the follow-up tone doesn't match how the buyer makes decisions. An analytical procurement lead needs data and structure. A visionary C-suite contact needs the big picture and urgency. Same deal, two completely different follow-up approaches.

Klearcomm gives your reps real-time guidance on how to communicate with each stakeholder at every stage — inside Outlook, Slack, and your CRM.

Worth a 20-minute conversation?

[Your Name]

VP OF PRODUCTION — MORTGAGE (CONVERSION EFFICIENCY ANGLE)

Subject: How top LOs convert more without more leads

Hi [First Name],

In this rate environment, volume isn't the answer. The teams winning right now are converting more from the leads they already have.

The difference almost always comes down to communication — specifically, whether your LOs adapt their style to each borrower's personality or send everyone the same follow-up with the same tone.

Klearcomm builds a communication profile for each borrower and tells your LO exactly how to follow up — in real time, inside Outlook and your CRM. It takes about 10 seconds and requires zero extra research.

Happy to show you a quick demo. 15 minutes?

[Your Name]

LinkedIn Follow-Up Template (Post-Connection)

Subject: LinkedIn Follow-Up — All Verticals

Thanks for connecting, [Name].

One thing I wanted to share: the most consistent pattern we see in teams that underperform isn't product knowledge, lead quality, or even effort. It's communication style mismatch — people communicating the way they prefer to communicate, not the way the other person is wired to receive it.

Klearcomm solves this in real time, inside the tools your team already uses. No new workflow, no personality framework to memorize, no training day that gets forgotten by Tuesday.

Happy to send a short overview or hop on a 15-minute call if you'd like to see it in action.

[Your Name]

04 — Discovery Call Guide

As a founder-led sale, your credibility in discovery comes from your depth of coaching experience — not from a product script. Lean into that. Ask genuinely curious questions, listen hard, and connect what you hear to specific Klearcomm features. The goal is to understand which of the three buyer entry points (CEO, HR, Sales VP) is driving the conversation and which features will resonate most.

Universal Opening

Start every call the same way: 'Before I tell you anything about Klearcomm, I'd love to understand what brought this on for you — what made this feel worth 30 minutes of your time right now?' This one question surfaces the real pain and tells you everything about how to run the rest of the call.

#	Question	What You're Listening For
1	Tell me about your team — who they are, what they do, and where communication tends to break down.	The specific friction point: internal team conflict, manager-rep friction, or client/prospect communication mismatch. This tells you which features to lead with.
2	When you think about your top performers — what do they do differently in conversations than everyone else?	They'll describe adaptability, rapport-building, reading the room. This sets up: 'What if every person on your team could do that automatically?'
3	How do people on your team currently learn how to communicate with different personality types — or do they?	If the answer is 'DISC training' or 'nothing' or 'instinct,' you have your opening. Both confirm the application gap Klearcomm solves.
4	Have you ever lost a deal, a key hire, or a good employee that you traced back to a communication breakdown?	Real stories = real pain. Get specific: what happened, what was the cost, how did you find out? This anchors the ROI conversation.
5	Do you use any personality or behavioral tools today — DISC, MBTI, Predictive Index, anything like that?	If yes: 'Klearcomm makes that investment actually work day-to-day.' If no: 'Klearcomm can generate profiles automatically — no surveys needed.'

#	Question	What You're Listening For
6	Walk me through what a new hire's first 90 days look like — specifically around communication and client interaction.	Long ramp, inconsistent onboarding, no communication framework = Advice Ally + Profile Directory story. This lands especially well with HR buyers.
7	What does your current email communication look like across the team — is it consistent, branded, high-quality?	Opens the Communication Compliance conversation, especially with CEOs worried about brand and HR leaders worried about culture.
8	What does your tech stack look like — CRM, email, collaboration tools?	Maps the integration path. Salesforce/HubSpot = CRM Codex story. Outlook/Gmail + Slack = Insight Hub. Existing DISC = Profile Directory.
9	If I could show you that Klearcomm meaningfully improved [their stated pain] in 30 days, what would 'meaningful' mean to you?	Defines their success criteria. Shapes the pilot design and the proposal. The answer to this question wins deals.
10	Who else would be part of this decision — and what would they need to feel confident?	Maps the buying committee. CEO may be solo; HR and Sales VP usually involve each other. Get all stakeholders on the table early.

Feature Routing by Buyer Role

If the primary buyer is...	Lead with these features	Add-ons to introduce if fit is strong
CEO / Owner	Profile Directory (culture and leadership story) + Advice Ally (application bottleneck story) + Communication Compliance (governance and brand protection)	Sales Scout if they have a sales team; CRM Codex if they're on Salesforce/HubSpot
HR / People Leader	Profile Directory (makes existing DISC/MBTI data actionable) + Advice Ally (replaces forgotten training with daily application) + Communication Compliance (manager and employee communication standards)	Email Plugin / Slack Plugin as delivery mechanisms; loop in Sales VP for Sales Scout conversation
VP of Sales / Director of Production	Advice Ally (live deal and call guidance) + Email Plugin (prospect-adapted outreach) + Sales Scout (external profile generation) + CRM Codex (in-CRM guidance)	Communication Compliance if email quality across the team is a stated pain; loop in HR for internal alignment story

05 — Demo Script & Flow

The best Klearcomm demo is one where the prospect sees their own team's exact problem solved live. Before every demo, use Klearcomm's own tools to build a profile on the prospect from LinkedIn — then adapt your demo energy and pacing to what you learn. Practice what you pitch.

Time	Step	What to Do / Say
0–3 min	Re-anchor on discovery pain	"Before I jump in — you mentioned [specific pain from discovery]. I've structured this around that specifically. If that's still the priority, we'll stay there. Does that still feel right?"
3–6 min	The knowing-vs-doing gap	"Every personality tool in the market has the same problem: the gap between knowing someone's type and actually communicating differently with them in the moment. DISC training closes on a Friday and by Monday everyone's sending the same emails. Klearcomm solves that. Let me show you how."
6–10 min	Profile Directory	Open the platform. Show a team member's profile — dos, don'ts, communication style summary. "This is the foundation. Every profile is built from your existing DISC, MBTI, or PI data — or Klearcomm can run an assessment in minutes. This is what the whole platform references." Walk through dos/don'ts for two different personality types side by side.
10–16 min	Advice Ally	"Now here's the feature nobody else has. Watch what happens when [name] is about to send a text to [colleague]." Show Advice Ally surfacing real-time guidance. "It tells you right now — not after a training day you'll forget — exactly how to frame what you're about to say based on who you're saying it to. This is the application layer that turns knowledge into behavior change."
16–21 min	Email Plugin or Slack Plugin (Insight Hub)	Open Outlook or Gmail. Show the real-time suggestions as a message is being composed. "Every email your team writes now gets adapted to the recipient's profile — automatically. No extra step, no framework to remember. It just works." For HR buyers, pivot to Slack plugin for internal team communication.
21–26 min	Communication Compliance (for CEO/HR) or Sales Scout/CRM Codex (for Sales VP)	CEO/HR: Show Communication Compliance — how outgoing emails are reviewed against communication standards before they leave. "This is the governance layer — it protects your company's communication quality at scale." Sales VP: Show Sales Scout building a prospect profile from LinkedIn in real time. Then show CRM Codex surfacing that profile inside a Salesforce or HubSpot deal record.
26–30 min	ROI framing	"Based on what you told me — [their specific pain, team size, cost of the problem] — here's what I'd expect the return to look like." Use their own numbers. Even a 10% improvement in the metric they care about most — conversion, ramp time, retention — is enough to make the math work.
30–35 min	Proposed next step	"Based on what you've seen — does this solve what you described? What would make the most sense as a next step? We typically start with a focused pilot — [5–15 users, 30 days, specific use case]. I can have accounts live by [day after tomorrow]. Want to map that out now?"

Demo Do's and Don'ts

Start every call the same way: 'Before I tell you anything about Klearcomm, I'd love to understand what brought this on for you — what made this feel worth 30 minutes of your time right now?' This one question surfaces the real pain and tells you everything about how to run the rest of the call.

✅ DO

- Use the prospect's own LinkedIn profile to build a live Klearcomm profile during the demo — it creates an undeniable 'wow' moment
- Tie every feature to something they said in discovery — 'you mentioned agents use the same pitch with everyone — here's exactly how Advice Ally fixes that'
- Show Profile Directory before anything else — it anchors the whole platform
- Ask mid-demo: 'Can you already see how this would work for [specific person or situation they mentioned]?'
- End with a specific pilot proposal — dates, user count, use case. Don't leave open-ended.

❌ DON'T

- Don't show all five features in every demo — pick 3 based on the buyer role and what emerged in discovery
- Don't lead with Sales Scout for CEO or HR buyers — it's a Sales VP feature and can confuse the value story for other buyers
- Don't use jargon (DISC profiles, behavioral science, personality AI) without a plain-English translation first
- Don't end the call without a next step confirmed — every demo without a next step is a deal in decline
- Don't forget to use Klearcomm on the prospect before the demo — model the behavior you're selling

06 — Objection Handling Guide — Top 10

As a founder, your credibility in handling objections comes from your coaching background and genuine belief in the product — not a memorized script. Know these responses well enough to say them in your own voice. The 'Founder Tip' under each objection is specifically for the consultative, founder-led context.

1. "We already use DISC / MBTI / Predictive Index."

Recommended Response:
That's genuinely the best possible starting point — it means your team already believes the science works. The challenge every company with existing personality data runs into is application: how often do your people actually change how they communicate based on those profiles in the moment? Klearcomm takes the data you've already invested in and makes it live in every email, every Slack message, every conversation — automatically. You don't have to throw anything away. You just finally get the ROI from what you already bought.

💡 Founder Tip: *This is your warmest possible objection. Slow down and let them feel the validation before the pivot. Lean on 'makes your existing investment 10x more useful' — not 'we're better than DISC.'*

2. "This feels manipulative — we want authentic relationships."

Recommended Response:
That's one of the most meaningful things I hear, and it's worth taking seriously. Here's the honest answer: Klearcomm doesn't tell you to be someone you're not. It helps you communicate in a way that genuinely lands with the other person. Think of it like speaking someone's native language instead of making them translate yours. You're not being fake — you're being considerate. The coaching methodology behind Klearcomm was built on that exact principle: deeper authenticity through better awareness, not scripted behavior.

💡 Founder Tip: This objection usually comes from high-S or high-I personality types who care deeply about genuine connection. Slow down, make eye contact (metaphorically on Zoom), and speak from your coaching experience here. It's your strongest ground.

3. "My team won't adopt another tool."

Recommended Response:
Fair — adoption is where most sales and HR technology dies, and you've probably seen it happen. Two things work in Klearcomm's favor: first, the Insight Hub lives inside Outlook, Gmail, and Slack — there's no new platform to log into. Your team keeps doing exactly what they're doing, and Klearcomm shows up inside it. Second, adoption tends to be fast because reps and managers see personal value immediately. When Advice Ally tells you the right way to handle a conversation you're dreading — and it works — you're sold. Would a small pilot with your five most open-minded people make sense as a starting point?

💡 Founder Tip: The 'no new app to log into' point is genuinely important — say it clearly and let it land. Then pivot to the pilot offer. S-types need reassurance that disruption is minimal; D-types just want to know it works.

4. "Is this validated science or just another AI gimmick?"

Recommended Response:
Both fair questions, and I'll answer them separately. The behavioral science behind Klearcomm — DISC, MBTI, the Big Five — has decades of academic research and Fortune 500 application behind it. That's not new. What Klearcomm adds is an MIT-engineered AI layer that applies that science in real time to actual communication contexts, and a coaching methodology built over 20 years that ensures the guidance is grounded in how real communication actually works — not just what a model predicts. Would it be more useful to go deeper on the methodology, or would you rather just see it working on a real profile right now?

💡 Founder Tip: C-type buyers will push hardest here and deserve a real answer — don't deflect. D-types will tune out the methodology and want the demo. Know which you're talking to and route accordingly.

5. "We don't have budget right now."

Recommended Response:
That makes sense — I'm not trying to force a timeline that doesn't fit. Let me ask: is there a sales kickoff, a new hire class, or a culture initiative coming up where better communication would be directly relevant? Even at the Starter level, an individual rep or manager can start seeing value this week for $49 a month — and one improved conversion or one retained employee pays for a year of that. If the conversation is about a larger team deployment, I can help you build the business case using hard numbers from your own situation — conversion rates, ramp time, turnover cost. Would that be useful?

💡 Founder Tip: Understand whether this is a real constraint or a stall before responding. Ask a gentle clarifying question: 'Is it a matter of timing, or is it more about justifying the investment internally?' The answer tells you where to go next.

6. "We've tried personality tools before and they didn't stick."

Recommended Response:
That's actually the most common story I hear, and it's exactly why Klearcomm exists. The tools that didn't stick all had the same problem: they gave you information and expected you to change your behavior based on it. That's not how behavior change works — especially under pressure, in the middle of a hard conversation, or during a busy quarter. Klearcomm doesn't give you information and hope for the best. It delivers guidance in the exact moment you need it — inside the email you're writing, during the meeting you're in. It removes the gap between knowing and doing that killed every other tool.

💡 Founder Tip: This objection comes with genuine scar tissue. Acknowledge it directly and don't minimize it. Your coaching background is your credibility here — you've seen this failure pattern up close. Speak to it from experience.

7. "How is this different from Crystal or Humantic AI?"

Recommended Response:
A few meaningful differences. First, Klearcomm works with any assessment your team has already done — DISC, MBTI, PI — rather than requiring a new proprietary framework. Second, the Advice Ally feature is something neither Crystal nor Humantic has — it's real-time guidance for live conversations, texts, and casual interactions, not just email personalization. Third, Klearcomm covers both internal communication (your team's dynamics, manager coaching) and external sales prospecting in one platform. And fourth, the Communication Compliance feature is unique to Klearcomm — no competitor offers governance-layer communication quality controls. The question isn't whether those tools have value; it's whether they solve the full problem.

💡 Founder Tip: Don't be dismissive — acknowledge Crystal and Humantic as legitimate options before differentiating. The Advice Ally and Communication Compliance angles are your strongest unique ground. Lead with those.

8. "Our people are experienced — they already know how to read people."

Recommended Response:
Your best people do — and that's exactly the point. What your best communicators do intuitively is brilliant, but it's not transferable without a system. When they leave, retire, or get promoted, that instinct goes with them. Klearcomm captures what your best communicators do and makes it available to everyone on your team, consistently, every day. And even your best people have blind spots — personality types they naturally connect with and types they don't. Klearcomm is most valuable in the interactions where even a great communicator would admit they're guessing.

💡 Founder Tip: Validate the instinct first — always. Then reframe: 'You're right, and that's actually the point. The goal is making the whole team as good as your best person, not making your best person better.'

9. "We're too small for this right now.”

Recommended Response:
That's actually when this matters most. Before habits are set, before a communication culture calcifies, before the gap between your best and worst communicators becomes a fixed part of how your team operates. The Starter plan at $49 a month was built specifically for individuals and small teams who want to develop this muscle early. And in my experience coaching communication for 20+ years, the teams that build intentional communication practices when they're small are the ones whose culture becomes a genuine competitive advantage when they scale. Is there one or two people on your team who you'd say are the biggest communication opportunity right now?

💡 Founder Tip: Early-stage buyers need to feel like this is accessible, not premature. Remove friction — offer to get them set up in 24 hours, starting with one or two people. The Starter plan is your entry point.

10. "Can we try it before committing?”

Recommended Response:
Absolutely — that's how I'd want to do it too. Here's what a pilot looks like: I set up a team account with full features for [X] users for 30 days. You connect your email, upload or run a quick assessment, and you're live within 24 hours — no IT project, nothing to install beyond a plugin. At the end of 30 days, we review usage together and I'll show you exactly what value was created. If it delivered what I'm promising, the path forward is obvious. If it didn't, you've lost 30 days and I've lost a customer — which is why I only propose this to teams where I'm confident in the outcome. Can we lock in a start date now?

💡 Founder Tip: The last line — 'I only propose this when I'm confident' — is key for a founder-led sale. It signals conviction and filters out tire-kickers at the same time. Say it and mean it.

Pricing Model Summary

Starter	$49/month per user, billed annually. Self-serve. Designed for individuals and small teams. Includes Profile Directory, Advice Ally basics, Gmail/Outlook plugin, entry-level analytics.
Professional	Custom pricing. Designed for growing teams of 15–100 users. Full Foundation Layer, Insight Hub (Email + Slack), Sales Scout, CRM Codex, enhanced analytics. Primary deal type for mid-market accounts.
Enterprise	Custom pricing. Org-wide deployment, 100+ users. All features including Communication Compliance, custom playbooks, dedicated CSM, enterprise-grade security, company-wide analytics and reporting.
Pilot / Proof of Concept	30-day pilot at no cost or reduced cost for qualified accounts. Full feature access for 5–15 users. Requires a scheduled kickoff and a 30-day results review call. Convert to annual within 45 days or close the loop.

Entry Point by Buyer Role

Buyer Role	Recommended Entry Point	Natural Expansion Path
CEO / Owner	Team pilot: Profile Directory + Advice Ally for leadership team (5–10 users). Starter or Professional depending on size.	Communication Compliance (Enterprise). Sales Scout if they have a sales team. CRM Codex when CRM is confirmed.
HR / People Leader	Team pilot: Profile Directory + Advice Ally + Email Plugin for HR team and managers (10–20 users).	Expand to full org. Communication Compliance. Loop in Sales VP for Sales Scout + CRM Codex conversation.
VP Sales / Production	Team pilot: Insight Hub (Email Plugin) + Sales Scout for sales team (5–15 reps).	CRM Codex once CRM integration is confirmed. Communication Compliance. Loop in HR for internal profile data.

Proposal Best Practices

- Always confirm the decision-maker and budget holder before sending a proposal — founder-led sales often involve the CEO directly, but mid-market HR and Sales VP deals may require CEO buy-in separately
- Lead page one with their problem statement using their own words from discovery — not a feature list
- Anchor the ROI to their specific numbers: team size, current ramp time or close rate, estimated cost of the problem
- Offer two options in every proposal: a focused pilot (5–15 users, 30 days, specific use case) and a full deployment — never a single-option proposal
- Set a 30-day expiration on pricing and follow up with a call within 48 hours of sending
- For prospects with existing DISC/MBTI/PI data: lead the proposal with 'This makes your existing investment actionable' — it reframes the purchase as an extension of something they've already decided to invest in

08 — Pipeline Stage Definitions

1. Lead	10%	ICP-matched contact identified. No meaningful conversation yet.	Confirmed ICP fit (vertical, size, role). At least one outreach attempt made.
2. Qualified	20%	Initial response received. A pain or interest has been confirmed.	Specific pain articulated. Champion or decision-maker identified. Discovery call scheduled.
3. Discovery	35%	Discovery call completed. Pain, use case, team structure, buying process documented.	Primary buyer role understood (CEO/HR/Sales). Features to lead with identified. Demo scheduled.
4. Demo / Pilot	50%	Demo delivered OR pilot access live and in use.	Demo: clear positive signal + next step confirmed. Pilot: kickoff call done, 3+ active users.
5. Proposal	65%	Formal proposal sent to decision-maker.	Proposal acknowledged. Follow-up call scheduled. At least one substantive exchange initiated.
6. Negotiation	80%	Active discussion on terms, scope, or pricing.	Decision timeline confirmed. All key stakeholders identified. No blocking issues outstanding.
7. Closed Won	100%	Agreement signed or payment received.	Account confirmed. Onboarding kickoff scheduled within 3 business days.
8. Closed Lost	0%	Formally declined or silent after 3+ follow-up attempts.	Loss reason documented. Breakup note sent. Re-engagement date set (6 months).
1. Lead	10%	ICP-matched contact identified. No meaningful conversation yet.	Confirmed ICP fit (vertical, size, role). At least one outreach attempt made.

Pipeline Health Rules

- Any deal in Stages 1–3 without activity for 30+ days must be reviewed at the next pipeline check-in
- Any deal in Stages 4–6 without a documented next step for 21+ days needs an immediate re-engagement action
- Every pilot must have a 30-day results review call scheduled before it starts — pilots without a scheduled review close at a fraction of the rate of those with one
- Maintain 3x target revenue in Stages 3–6 at all times to account for founder-led cycle variability
- A proposal with no response after 14 days: send a re-engagement or breakup email — do not let it sit passively

Klearcomm competes primarily against Crystal (CrystalKnows), Humantic AI, and the entrenched status quo of DISC/MBTI training programs. Because the sale is founder-led, use your coaching background to speak credibly about what traditional tools miss — you've seen it firsthand.

Crystal (CrystalKnows)

DISC-based personality profiles via Chrome extension, writing assistant, pre-meeting playbooks

Their Pitch

Real-time DISC profiles from LinkedIn, email writing assistant, and pre-meeting playbooks — primarily delivered as a Chrome extension overlay.

✅ When Klearcomm Wins

- Klearcomm's Advice Ally covers live conversations, texts, and casual interactions — Crystal is email and meeting prep only
- Klearcomm's Communication Compliance has no Crystal equivalent — it's a governance layer Crystal doesn't offer
- Klearcomm works with any existing assessment (DISC, MBTI, PI) — Crystal uses its own proprietary DISC framework only
- Klearcomm's Profile Directory is an internal team resource; Crystal is primarily an external prospect tool
- Klearcomm covers the full org (sales, HR, leadership, internal teams) — Crystal is a sales-only point solution
- Klearcomm's Insight Hub (Email + Slack) is embedded deeper in workflow vs. Crystal's overlay approach

⚠️ Tread Carefully When

- Crystal has stronger brand recognition and more user reviews — prospects may reference it by name
- Crystal's Chrome extension is well-designed for individual reps who want quick prospect lookups
- If already on Crystal, position Klearcomm's internal use case (Profile Directory, Advice Ally, Compliance) as the expansion layer Crystal doesn't cover

💬 Suggested Talk Track

Crystal is a solid tool for individual reps who want DISC lookups on LinkedIn. What it doesn't have is the application layer — it tells you what type someone is and expects you to figure out the rest. Klearcomm tells you what to say right now, in the email you're writing, in the conversation you're about to have. And it covers your internal team, not just your prospects. That's a fundamentally different and more complete platform.

Humantic AI

AI-generated buyer intelligence and personalized outreach optimization for sales teams

Their Pitch

Personality profiles from LinkedIn, personalized outreach copy generation, and buyer intelligence embedded in CRM and sales sequences.

✅ When Klearcomm Wins

- Klearcomm's Advice Ally for live conversation guidance has no Humantic equivalent
- Klearcomm covers internal communication (team, HR, leadership) — Humantic is externally focused only
- Klearcomm's Communication Compliance is unique — Humantic has no governance layer
- Klearcomm works with existing DISC/MBTI/PI assessments — Humantic is a separate proprietary system
- Klearcomm's Profile Directory creates a shared internal knowledge base — Humantic is individual rep tooling
- Klearcomm is built on 20+ years of coaching methodology — Humantic is a pure-play AI prediction tool

⚠️ Tread Carefully When

- Humantic has deeper outbound sequence integration (Outreach, SalesLoft) for pure SDR-driven motions
- If the prospect runs a high-volume outbound team with a dedicated SDR function, acknowledge Humantic's sequence tooling strength
- Humantic's AI-generated email copy may appeal to teams that want AI to write for them vs. guide their writing

💬 Suggested Talk Track

Humantic is a strong option for outbound email personalization at scale. Where Klearcomm is different: it's not just a prospecting tool. It covers the full communication stack — from internal team dynamics and manager coaching to live deal conversations and CRM guidance. And the Advice Ally feature for real-time live interaction guidance is something Humantic doesn't offer at all. If you need a company-wide communication intelligence platform — not just a sales sequence personalizer — Klearcomm is the right answer.

DISC / MBTI / PI Training Programs

In-person and online personality framework training and certification

Their Pitch

We run DISC workshops at our annual kickoff and have everyone's types on file. Managers are trained to coach using the framework.

✅ When Klearcomm Wins

- Klearcomm makes the DISC/MBTI/PI data you already have actionable every day — not just on training day
- Training is a one-time event; Klearcomm's Advice Ally is live in every interaction, every day, forever
- Klearcomm covers external contacts (prospects, clients) using profile generation — training covers only your own team
- Klearcomm's Communication Compliance layer provides governance that no training program can replicate
- Klearcomm measures actual behavior in communication tools — training produces certificates, not outcomes
- Profile Directory creates a living, searchable reference; a training binder sits on a shelf

⚠️ Tread Carefully When

- Teams with a strong, existing DISC culture may be protective of their investment — position Klearcomm as additive, never competitive
- Some buyers have been burned by training that didn't stick and are skeptical of any tool — acknowledge the scar tissue directly

💬 Suggested Talk Track

The investment your company made in DISC training was the right instinct — the science is real. The problem, and I've seen this up close in coaching for 20+ years, is that knowledge without an application system doesn't produce lasting behavior change. People leave the workshop energized and are back to their default patterns by the following week. Klearcomm doesn't replace the training — it's what finally makes it work. Think of the training as the education and Klearcomm as the daily practice tool. The combination is what most teams have been missing.

10 — Onboarding & Handoff Process

In a founder-led sale, the founder often stays involved through early onboarding — and that's a significant advantage. Use it. The personal continuity from sale to activation reduces early churn dramatically. The goal is fast time-to-first-value: most users should have their first meaningful Advice Ally or email optimization experience within 48 hours of go-live.

Pre-Onboarding Checklist — Before Account Setup

- Use case and buyer role clearly documented: is this a CEO/culture play, HR/training play, or Sales/revenue play? Which features are the priority?
- Assessment status confirmed: do they have existing DISC/MBTI/PI data to upload, or will they run new assessments inside Klearcomm?
- Tech stack confirmed: which email client (Outlook vs. Gmail)? Slack? CRM (Salesforce vs. HubSpot)?
- Pilot scope agreed: which users (names or roles), which features, what does 30-day success look like to them?
- Kickoff call scheduled within 3 business days of sign — do not wait for them to reach out
- Welcome email sent within 24 hours of sign, with clear next steps and a specific date/time for the kickoff call

Welcome Email Template

Subject: You're in — here's exactly what happens next

Hi [First Name],

Really glad to have [Company] started with Klearcomm. Based on our conversations, I know exactly what we're building toward — [reference their specific goal, e.g., 'giving your agents the communication instincts of your top producers' or 'making your existing DISC data actually work day-to-day'].

Here's what the next few days look like:

1. I'll send plugin install instructions for [Outlook/Gmail/Slack] today. Takes about 5 minutes.

2. We have a kickoff call on [DATE/TIME] where I'll walk the team through setup and make sure everyone is configured for [their specific use case].

3. Within 48 hours of that call, every user should have their first meaningful Klearcomm experience.

If anything comes up before our call, reply here or text me at [number]. Looking forward to it.

[Your Name]

Standard Onboarding Flow

Milestone	Owner	Activities & Goal
Day 1–2	Founder + Client Admin	Plugin installation (Outlook/Gmail/Slack). Assessment upload or new assessment creation inside Klearcomm. Account configuration for pilot users. Goal: everyone is installed and has their profile set up before the kickoff call.
Day 2–3	Founder	Kickoff call (45 min): live walkthrough of Profile Directory, Advice Ally, and primary Insight Hub integration. Tailor demo to their vertical and use case. Record for absent team members. Goal: every pilot user has seen it work and knows what to do next.
Day 3–10	Client team (founder available)	Pilot users use Klearcomm on real interactions — emails, Slack messages, live conversations. Founder available via direct line for questions. Goal: at least 5 active users with a meaningful interaction by Day 10.
Day 14	Founder + Client	Two-week check-in (20 min): review early usage, capture any wins or friction points, solve any adoption gaps. Identify users not yet activated and troubleshoot together.
Day 30	Founder + Client	30-day review: usage data, self-reported wins, conversion or ramp time impact where measurable. This is the renewal or expansion conversation. Come prepared with usage data and at least one concrete outcome story.
Day 60	Founder	60-day expansion check: are there additional use cases, additional users, or additional features worth adding? Introduce CRM Codex or Communication Compliance if not already live. Referral or case study conversation.

Expansion & Upsell Triggers

- High active user rate (80%+ of pilot users engaging weekly) — clear signal for full team rollout
- HR buyer asks about onboarding or manager coaching use cases after starting with sales — expand to full Foundation Layer
- Sales VP asks 'can this work inside our CRM?' — CRM Codex conversation
- CEO or HR mentions email quality, brand consistency, or a communication incident — Communication Compliance conversation
- New hire class, new market launch, or acquisition — fresh onboarding opportunity at the new scale
- Strong pilot outcome — ask for a reference call or written testimonial before the 30-day review ends

This playbook is a living document. Review quarterly — update when messaging is refined, pricing changes, new features launch, or new competitive intelligence surfaces. Owner: Founder. Review cycle: Quarterly.

KLEARCOMM™

KLEARCOMM™