SALES · AI ASSISTANT

Sales Assistant with Memory & Safety Gates

B2B Sales Scenario · Executive Brief

Prepared by

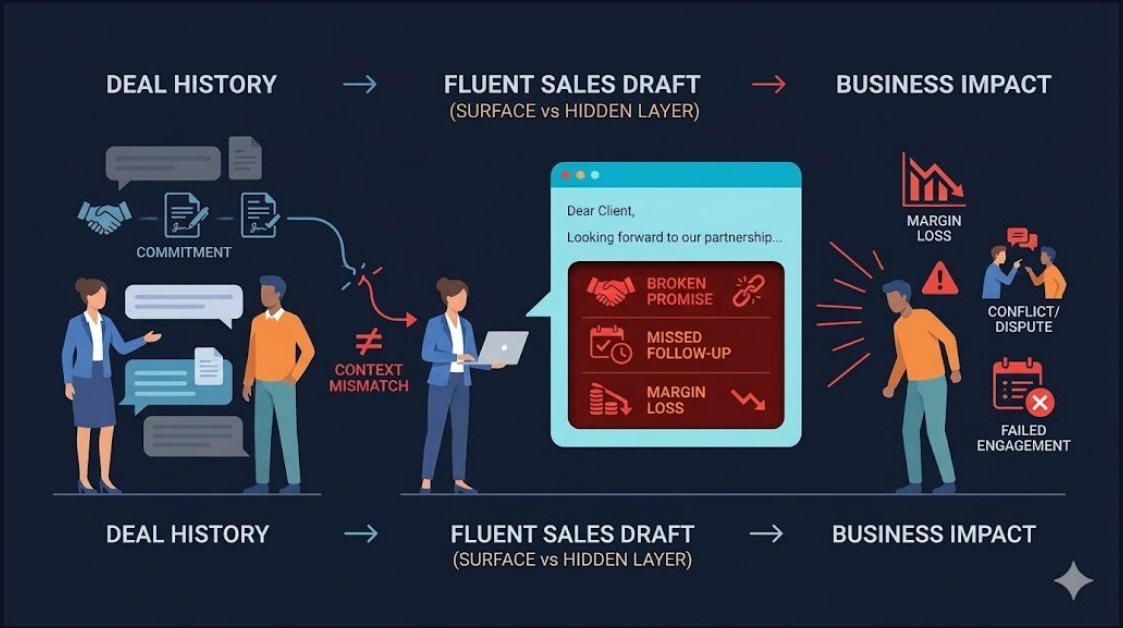
Rex Chang

GenAI & Cloud Solution Architect / Program Lead



PROBLEM

AI-generated sales replies can break prior deal promises



Each deal involves multiple approvals and prior commitments across time

A draft can sound right but still:

- break prior promises
- miss follow-ups
- create margin loss or disputes

The risk is persuasive but unsafe communication—not poor writing.

SYSTEM DESIGN

A *stateful* agent manages deal context across turns

The system keeps a structured memory of each deal:

PREFERENCES

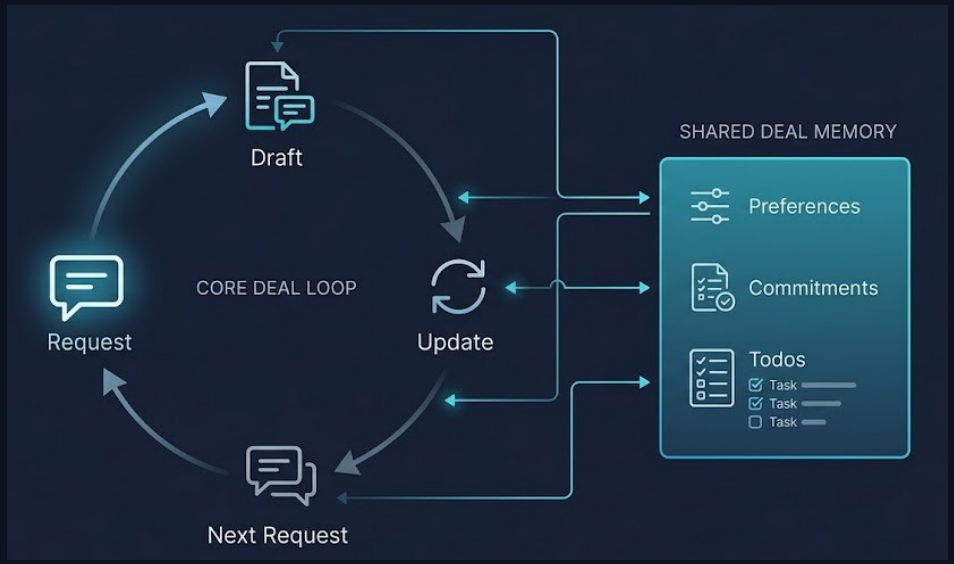
How to respond to this client

COMMITMENTS

What was promised in prior turns

TODOS

What must happen next



Each new request updates this shared state over time.

This is a stateful system that tracks deal context over time, not a one-shot assistant.

KEY MECHANISM

Memory Turns Prior Context into Explicit Checks



COMMITMENTS

Compare drafts with prior promises; flag detected conflicts.

FOLLOW-UPS

Check whether required next steps are carried forward.

GROUNDING

Evaluate claim support before assigning release.

Memory makes prior commitments explicit.

MEASURED GAINS

Measured Drafting Gains and a Clear Conflict-Detection Gap

Across 12 synthetic renewal scenarios:



Evaluated

Logged

Replayable

"Send-ready" means evaluator release on tested criteria.
Strict conflict catch: 1 of 4 cases.

More consistent follow-ups; commitment checks still need work.

"Send-ready" means evaluator release on tested criteria. Strict conflict catch: 1 of 4 cases.

Thank You!

Rex Chang

GenAI & Cloud Solution Architect / Program Lead

PORTFOLIO	LINKEDIN	EMAIL
rexchang.dev	linkedin.com/in/rex-chang-tw	rex@rexchang.dev