ahoy

The AI CRM trial kit.

Give two CRMs the same buyer emails. See which one updates the right deal, keeps the evidence and knows when to wait.



HOW TO USE THIS KIT

02
Operator brief
Give to the tester

03
Answer key
Keep with the evaluator

04
Scorecard
Fill in once per CRM

Run the trial

Use one fictional buyer at Alder Works for both deals. Process the messages in order, using their dates to resolve relative deadlines.

STARTING RECORDS

Opportunity	Owner	Stage	Amount
North rollout	Jo	Evaluation	$18,000,
South pilot	Sam	Discovery	$9,000

North's budget is pending, its contract is unsigned and it has no next step. Require approval before any outbound email. Record the connected channels and plan.

INCOMING MAIL / PASTE ONE MESSAGE AT A TIME

MON, NOV 23, 2026

For the North rollout, send the rollout plan by Friday. Budget still needs sign-off.

TUE, NOV 24, 2026

About the North rollout plan: move Friday's deadline to Monday, November 30. Everything else stands.

WED, NOV 25, 2026

Finance approved the $18,000 budget for North. We still need Legal to sign.

Read the evidence

After the run, inspect the record and open each source email. Compare the actual changes with the supported changes below.

01 A request creates a task

“send the rollout plan by Friday”

North gets one rollout-plan task due Friday, November 27. Its budget remains pending and its stage stays Evaluation.

02 A delay edits that task

“move Friday’s deadline to Monday, November 30”

The existing task moves to November 30. The task owner and forecast close date stay the same. Count a duplicate task as a correction.

03 Budget approval keeps the deal open

“Finance approved the $18,000 budget for North”

North’s budget is approved. Legal still has to sign, so the contract remains unsigned and the opportunity stays open.

CHECK BOTH DEALS AND THE SENT FOLDER

South is untouched. Neither deal amount changes. No outbound email has been sent without approval.

Score one CRM

Save a copy for each product. Use the same cases and approval settings in each run. Enter your observations below or print this page.

Product and plan

Tester and date

Connected channels

Setup time (minutes)

Correct deal matches (out of 3)

Traceable source emails (out of 3)

Unsupported changes or duplicate tasks

Emails sent without required approval

Review and correction time (minutes)

Normal monthly cost (currency + total)

What could a second user see and export?

Would you keep or switch? Record the observation that decided it.