

THE BD AGENT PLAYBOOK

*10 AI Agents Crypto and Tech BD Teams
Are Deploying Right Now*

\$60M+

Budget Managed

300+

Clients Managed

7+

Years in Ops

Your BD team is stuck. *Here's what's changing.*

Sales reps spend 30% of their week actually selling. The other 70% goes to research, admin, CRM updates, and writing follow-ups nobody reads on time. That ratio has been broken for years. What changed is that it's now fixable. AI agents aren't chatbots. They're systems that trigger on events, pull data from multiple sources, make decisions, and take action. A calendar booking triggers a research agent. A call transcript triggers a proposal agent. A dormant lead re-visiting your site triggers a re-engagement sequence. No human clicks required.

THE DATA

83%

of sales teams using AI saw revenue growth last year vs 66% without. (Salesforce)

3.7×

More likely to hit quota for reps who partner with AI tools. (Gartner)

47%

Lift in open rates and 61% in reply rates with AI-personalized outreach. (HubSpot)

83%

Of seller research workflows will start with AI by 2027. Under 20% in 2024. (Gartner)



Jack Haldorsson

Co-Founder, Lunar Strategy & Espresso AI

Seven years in crypto teaches you one thing: speed wins. You need to be on top of every lead, show up prepared, and follow up with a proposal that captures the value before someone else does. We started automating our BD workflows a few months ago. Our BDs are saving roughly 20% of their time. That means more calls, more deals in play, and the quality of our prep and proposals actually went up, not down.

This guide covers 10 agent use cases. Each includes the problem, how the agent works, the tech stack, and measured results. Most apply to any tech BD team running outbound, taking calls, and managing pipeline.

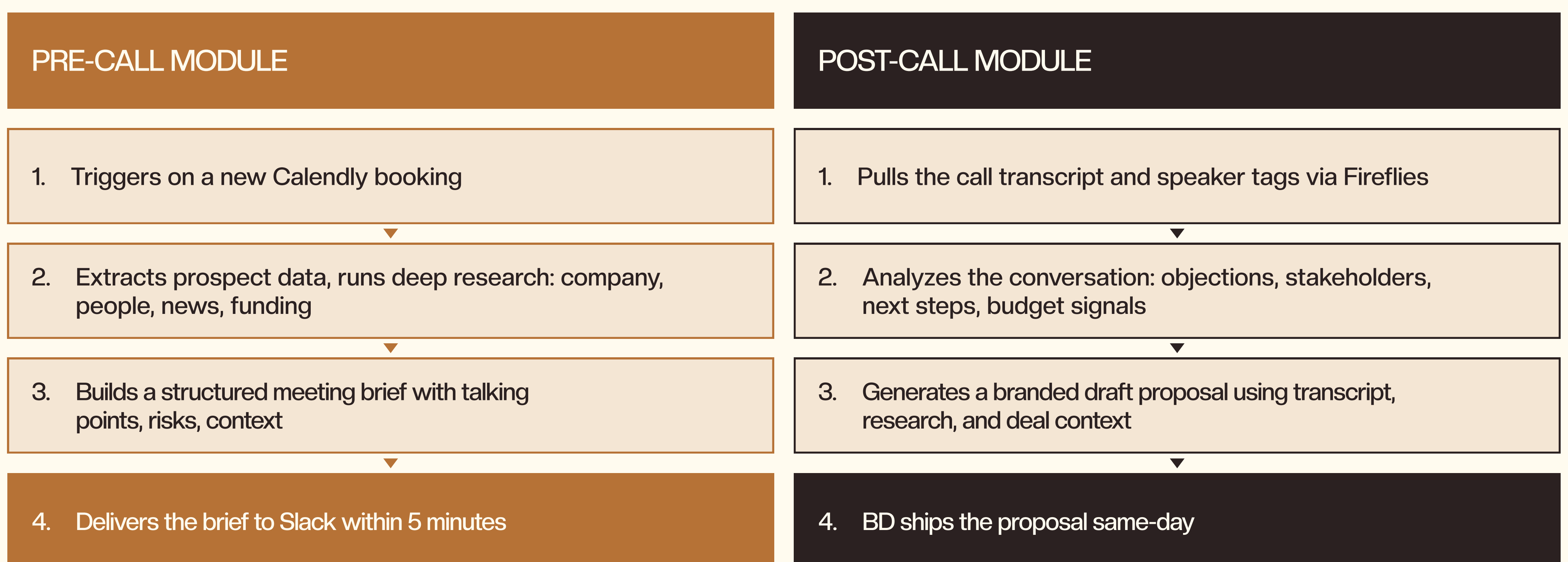
RevenueOS: Full-Cycle BD Meeting Intelligence

1.

THE PROBLEM

Before a call: your BD rep spends an hour Googling the prospect, scanning LinkedIn, reading scattered CRM notes, and still walks in half-prepared. After the call: another 45 minutes writing follow-up emails, updating CRM, and sketching a proposal from memory. The proposal goes out 2 to 3 days later. By then the prospect has talked to someone faster. Pipeline leaks at both ends of every meeting.

THE PROBLEM



PRE-CALL MODULE

1. Triggers on a new Calendly booking
2. Extracts prospect data, runs deep research: company, people, news, funding
3. Builds a structured meeting brief with talking points, risks, context
4. Delivers the brief to Slack within 5 minutes

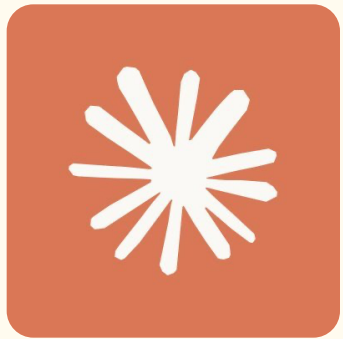
POST-CALL MODULE

1. Pulls the call transcript and speaker tags via Fireflies
2. Analyzes the conversation: objections, stakeholders, next steps, budget signals
3. Generates a branded draft proposal using transcript, research, and deal context
4. BD ships the proposal same-day

RevenueOS: Full-Cycle BD Meeting Intelligence

1.

TECH STACK



Claude API



Fireflies.ai



Custom Python



Slack API



Calendly API



n8n

RESULTS

20%

Reduction in BD admin time

5Min

Pre-call brief delivery

Same Day

Proposal turnaround

TECH STACK

Connect your calendar and transcript tools before anything else. If meetings don't flow through Calendly and calls don't hit Fireflies, the agent is blind. Start with human review on every proposal for the first two weeks, then loosen the guardrails as you trust the output.

CRYPTO ANGLE

The research module pulls protocol context, on-chain signals, governance data, and ecosystem news. If your calls involve tokenomics, exchange listings, or integration partnerships, the brief surfaces context that generic company research misses. Pair with Dune or TheGraph for deeper counterparty analysis.

TECH / SAAS ANGLE

For SaaS and tech BD, the value is in pulling product usage data, recent funding, hiring signals, and competitive positioning into the brief. Connect your product analytics (Mixpanel, Amplitude) and the briefs get sharper every month as the agent learns your ICP patterns.

See RevenueOS in action. 30 minutes, no deck, no pitch.

calendly.com/luka-espressio/30min

Outbound Personalization at Scale

2.

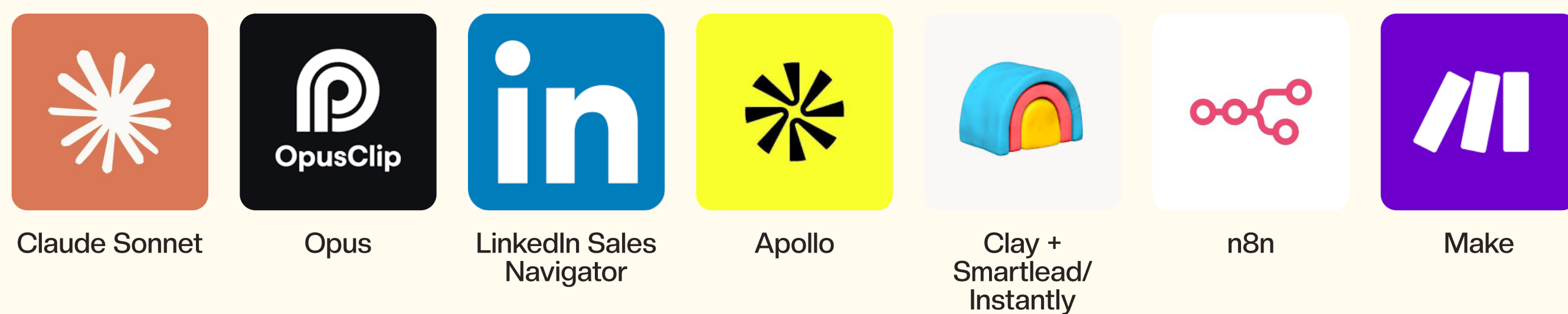
TECH STACK

Templated cold email gets sub-1% reply rates. Personalized outreach takes 15 to 20 minutes per contact. A small BD team working 500+ prospects can't do both volume and quality by hand.

WHAT THE AGENT DOES



TECH STACK



RESULTS

<p>5x</p> <p>Higher reply rates vs generic templates</p>	<p>30-50%</p> <p>Lower cost per qualified meeting</p>	<p>Volume</p> <p>At quality, without extra headcount</p>
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TECH STACK

Run a 50-contact test batch before scaling. Check every message for tone, accuracy, and whether the signal reference makes sense. Also: build in a 48-hour delay between LinkedIn connection and first message. Instant follow-up triggers platform flags.

CRYPTO ANGLE

On-chain enrichment is where this gets specific. An agent referencing a prospect's Snapshot vote, liquidity position, or governance participation stands out from generic LinkedIn DMs. Use Dune queries to enrich prospects with protocol-specific activity data.

TECH / SAAS ANGLE

For SaaS, the signal layer is product usage, G2 reviews, job postings, and tech stack changes. Clay's waterfall enrichment is strong here. Layer in intent data from Bombora or 6sense if your deal sizes justify the cost.

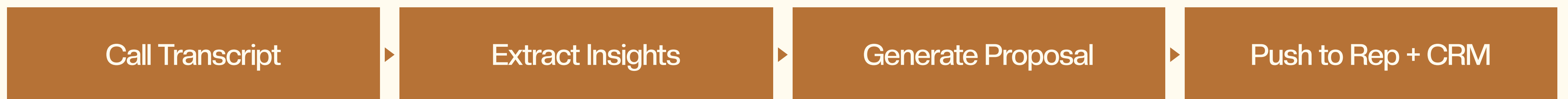
Post-Call Follow-Up and Same-Day Proposals

3.

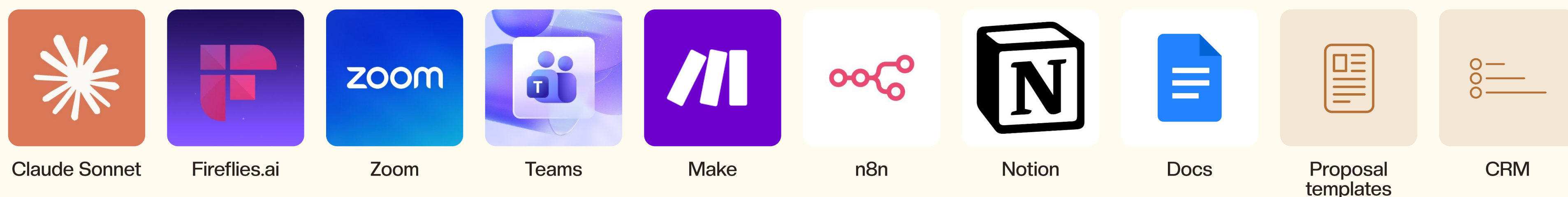
TECH STACK

After a discovery call, reps need 30 to 60 minutes for follow-up emails, CRM updates, and a proposal sketch. Most follow-ups land 2 to 3 days late. Momentum dies in that gap.

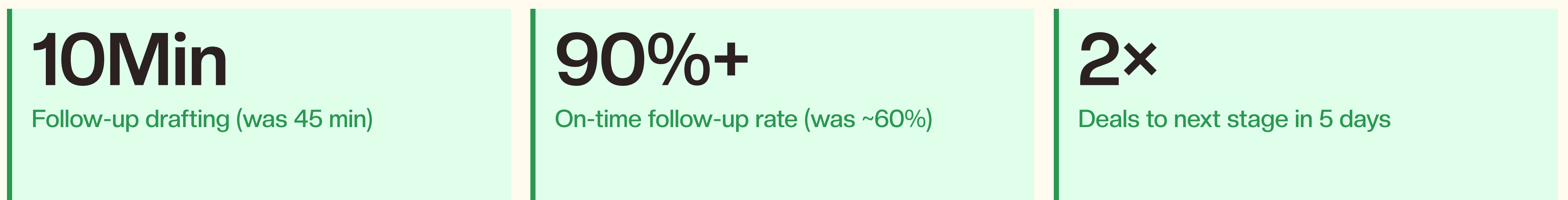
WHAT THE AGENT DOES



TECH STACK



RESULTS



TECH STACK

Feed the agent 5 to 10 of your best past proposals as training examples before going live. First draft quality jumps from "needs a full rewrite" to "needs 10 minutes of edits." Also: build pricing guardrails into the prompt. If the agent can hallucinate a discount, it will.

CRYPTO ANGLE

Crypto proposals often involve token allocations, vesting schedules, and ecosystem incentive structures. The agent needs your actual deal terms baked in. Feed it past partnership agreements and listing proposals as reference material.

TECH / SAAS ANGLE

SaaS proposals are more standardized, which makes this agent easier to deploy. Connect it to your CPQ or pricing calculator and output quality is high from week one. Getting a polished proposal the same day a demo happened moves deals faster than any discount.

Lead Qualification and ICP Scoring

4.

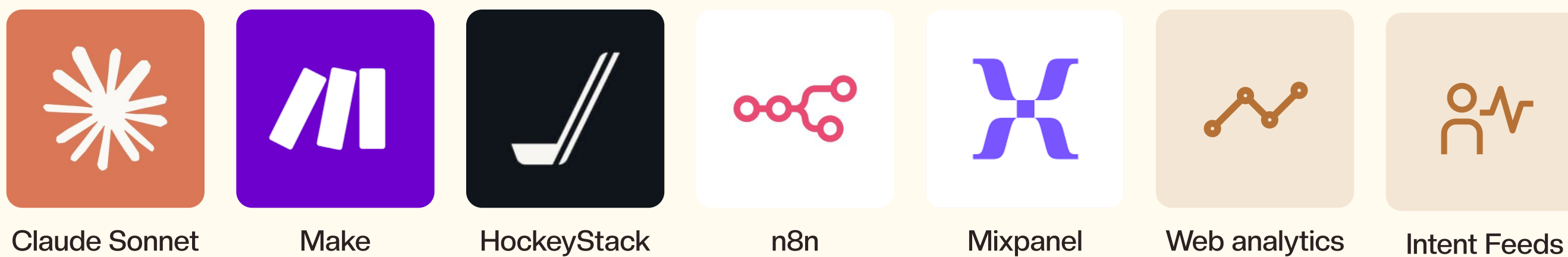
THE PROBLEM

Inbound leads pile up unscored. Outbound lists are huge but unfiltered. AEs burn time on calls with prospects who were never going to buy.

WHAT THE AGENT DOES



TECH STACK



RESULTS

40%

Fewer mis-routed leads

35%

More pipeline from inbound in 3 months

70%

Less manual qualification time

TECH STACK

Build a manual override path for referrals and warm introductions. The best accounts often don't match your ICP rubric on paper. Hard-code an exception lane for relationship-sourced leads. Also: recalibrate scoring weights quarterly — your ICP shifts as you learn which deals actually close.

CRYPTO ANGLE

In crypto, the most valuable qualification signals are on-chain: wallet activity, protocol TVL, governance participation, treasury size. An agent enriching leads with Dune and TheGraph catches high-value prospects firmographic scoring alone misses.

TECH / SAAS ANGLE

For SaaS, weight recent engagement over static firmographics. A 50-person company that visited your pricing page three times this week outscores a 500-person company that downloaded a whitepaper six months ago.

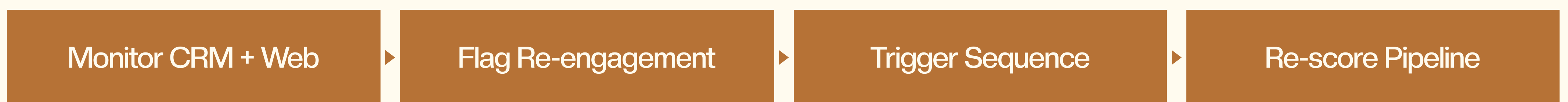
Pipeline Signal Monitoring and Lead Re-Engagement

5.

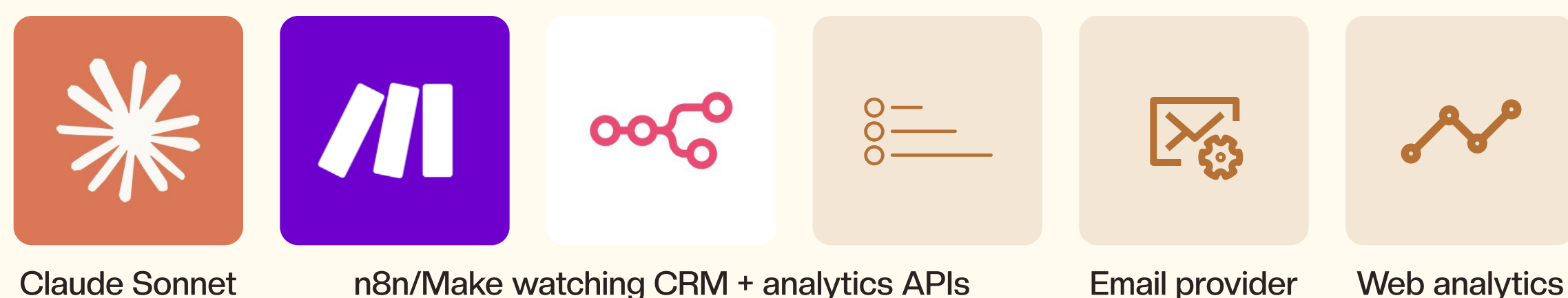
THE PROBLEM

Dead pipeline costs money. Deals go dark. By the time someone notices a dormant lead re-visited the site or opened an old email, the window has closed.

WHAT THE AGENT DOES



TECH STACK



RESULTS

15–20%

Dormant pipeline recovered in 90 days

–90%

Follow-up time after positive signals

30%

Better second-stage conversion

TECH STACK

A lead that went dark 5 days ago isn't dormant — they're busy. Two to four weeks of silence is a reasonable trigger threshold. Cap re engagement at 3 touches over 2 weeks. Teams recovering 15–20% of dead pipeline send 2–3 relevant, signal-referenced touches and stop.

CRYPTO ANGLE

Crypto markets create re-engagement windows other industries don't. A protocol that ghosted you may have raised a round, launched a token, or hired a BD lead. Signal agents tracking funding announcements and governance activity catch these windows early.

TECH / SAAS ANGLE

SaaS re-engagement signals are behavioral: pricing page revisits, new user sign-ups from a dark account, job postings for roles your product supports. Connect product analytics and visitor identification (Clay, Warmly) to catch signals in real time.

Sales Coaching and Call Analysis

6.

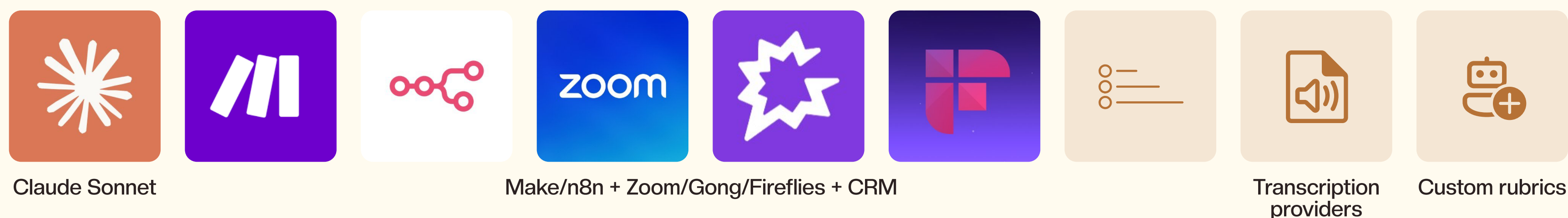
THE PROBLEM

Managers can't listen to every call. Most reps get feedback once a week, on the wrong calls. Coaching is inconsistent and coverage is low.

WHAT THE AGENT DOES



TECH STACK



RESULTS

3x

More coaching moments surfaced vs manual review

15–20%

Improvement in pipeline-to-win ratios

36%

Of sales teams with agents use them for coaching

TECH STACK

Build your scoring rubric from your actual top performers, not a generic sales methodology book. Record 10 calls from your best closer and use those patterns as the benchmark. Also: have the agent score managers' calls too. Nothing kills adoption faster than a tool that only watches the reps.

CRYPTO ANGLE

Crypto BD calls are technical. The agent needs custom scoring for protocol knowledge, tokenomics fluency, and ecosystem awareness. Build rubrics that reflect what your specific counterparties care about — not a Sandler or MEDDIC template.

TECH / SAAS ANGLE

The real value isn't scoring against a framework — it's catching patterns across dozens of calls: which objections keep coming up, which competitors get mentioned, which features drive the most interest. That aggregate view turns call analysis into product intelligence.

Competitor and Market Intelligence

7.

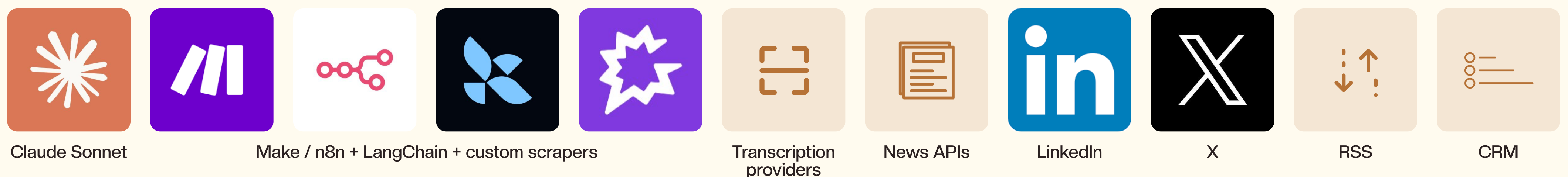
THE PROBLEM

Competitive intel lives in a quarterly deck nobody opens. Reps walk into calls not knowing the prospect just partnered with a competitor last week.

WHAT THE AGENT DOES



TECH STACK



RESULTS

<p>Daily Research cycles (was weekly)</p>	<p>20–30% Faster response to competitor moves</p>	<p>3Hrs To deploy a competitive pricing agent</p>
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TECH STACK

Feed the agent your CRM lost-deal data from the last 12 months. The most valuable competitive intelligence isn't what competitors announce — it's why you're losing deals. If 30% of lost deals mention the same competitor feature, your product team needs to know. Also: flag competitor job postings.

CRYPTO ANGLE

A competitor's TVL dropping 30% in a week tells you more than their blog post. Monitor DeFiLlama, GitHub commit activity, and Snapshot alongside traditional news. On-chain metrics — TVL shifts, user migration, governance proposals — are the signals that matter in crypto.

TECH / SAAS ANGLE

Layer in G2 review monitoring, product changelog tracking, and BuiltWith data to see which prospects are adopting or dropping competitor tools. The agent should answer one question weekly: what changed in our competitive landscape that our reps need to know before their next call?

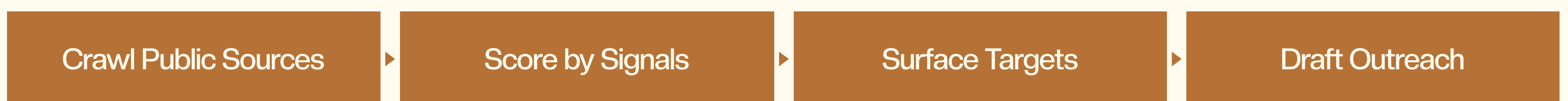
Partner and BD Deal Sourcing

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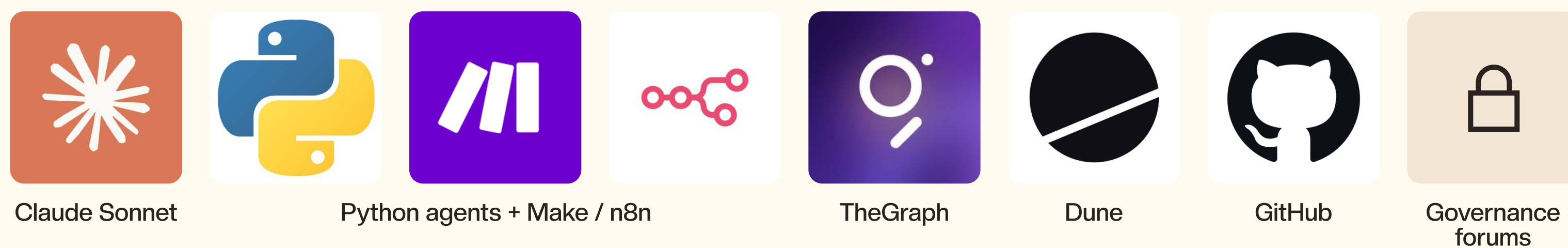
THE PROBLEM

Crypto BD means finding the right exchanges, protocols, and ecosystem partners. Tech BD means integration partners and co-sell opportunities. Both involve grinding through public data to find who's open for business.

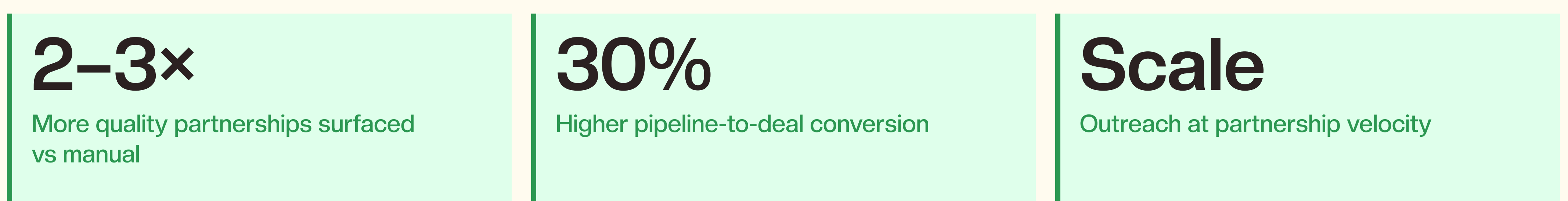
WHAT THE AGENT DOES



TECH STACK



RESULTS



TECH STACK

Auto-sending partnership pitches gets you ignored. Partnerships are relationship-driven. Use the agent to find and score opportunities, draft the first version, then personalize the top 10 yourself. Let it handle the research. You handle the conversation.

CRYPTO ANGLE

Data sources: TheGraph, Dune, GitHub, Snapshot, exchange listing feeds, DeFi dashboards, ecosystem grant pages. Score by TVL, volume, treasury size, developer activity, and governance participation. Flag protocols with active grant programs and chains with BD incentive budgets.

TECH / SAAS ANGLE

Data sources: Product Hunt, app marketplace directories (Salesforce AppExchange, HubSpot Marketplace, Shopify App Store), partnership program pages. Score by user overlap, tech stack compatibility, and partner program maturity. Flag companies that recently launched partner programs.

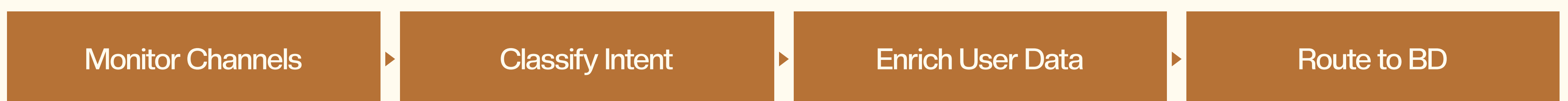
Community-to-Pipeline Conversion

9.

THE PROBLEM

Crypto projects live in Discord and Telegram. SaaS companies have Slack communities, forums, and subreddits. Thousands of messages daily. Buried in the noise: potential partners and buyers signaling interest. Most BD teams never see those signals.

WHAT THE AGENT DOES



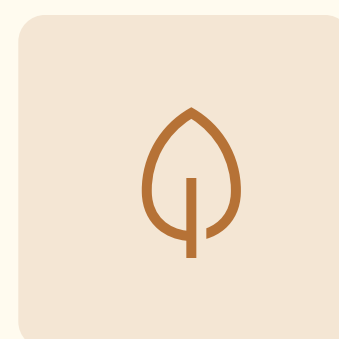
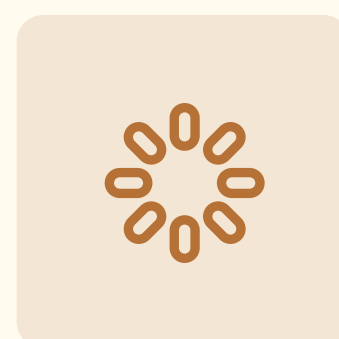
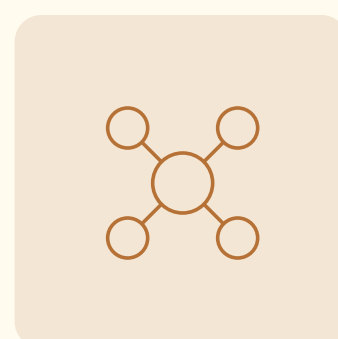
TECH STACK



Claude Sonnet



Node.js/Python bots + platform APIs + n8n/Make to CRM/Airtable



Enrichment

RESULTS

30–50%

More qualified community-sourced leads in 3 months

Real-Time

Pipeline from community signals

Automated

Community-to-CRM routing, no manual triage

TECH STACK

The agent has to add value to the community before routing anyone to BD. A bot that only extracts and never contributes gets flagged and banned. Build a helpful layer first. Also: let users opt in. A "Want to talk to our BD team?" button after a helpful answer converts better than an unsolicited DM.

CRYPTO ANGLE

Monitor Discord and Telegram for phrases like "how do I integrate with," "is there a grant for," "looking for a listing." Enrich users with wallet data where available. The most valuable leads often come from developers asking technical integration questions at odd hours.

TECH / SAAS ANGLE

For SaaS, monitor Slack communities, subreddits, Stack Overflow, and product forums for phrases like "looking for a tool that," "switching from [competitor]." The prospect posting "We're evaluating solutions for X" is further down the buying journey than most inbound leads.

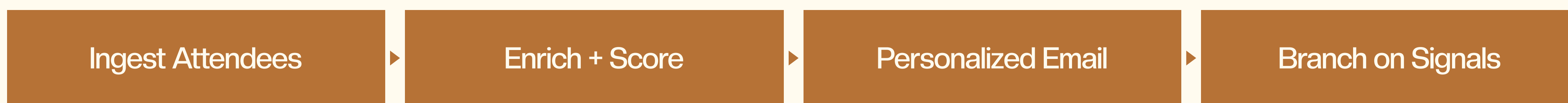
Event and Conference Follow-Up Automation

10.

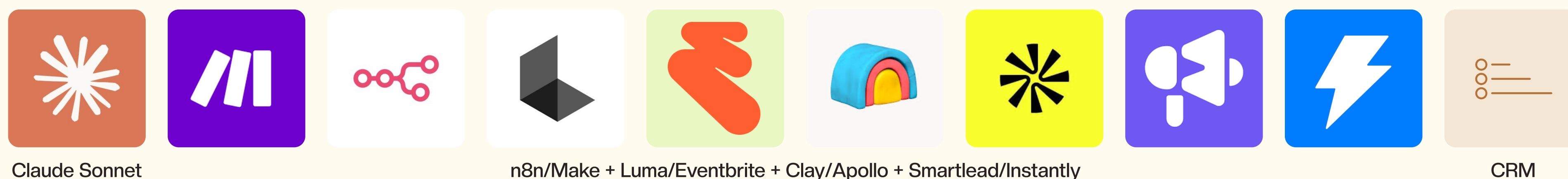
THE PROBLEM

10 to 20 events a year. Each generates 50 to 200 badge scans. Follow-up is a generic email sent 5 days late. Most contacts go cold.

WHAT THE AGENT DOES



TECH STACK



RESULTS

<p><24 hrs</p> <p>Follow-up turnaround (was 3-5 days)</p>	<p>2-3x</p> <p>Higher reply rates vs generic follow-up</p>	<p>15-25%</p> <p>More contacts converted to qualified pipeline</p>
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TECH STACK

Badge scan data is always messy. Wrong emails, missing names, duplicates, people who scanned for the free t-shirt. Build a data-cleaning and scoring step before the agent writes anything. Score by role fit, company fit, and conversation quality. Write different messages for "had a deep conversation" and "walked past the booth."

CRYPTO ANGLE

Crypto conferences (Token2049, EthDenver, Consensus, Devconnect) are a top BD channel. Enrich badge scans with on-chain data and protocol relevance. Also: layer in side-event and hackathon attendee lists. The best partnerships often start at the hackathon dinner, not the main stage.

TECH / SAAS ANGLE

Tech conferences generate high volumes but lower signal density. Score by company size, tech stack fit, and buying stage. Tier contacts into hot, warm, and long-term nurture. A CTO from a Series B company in your ICP gets priority over a marketing intern at a Fortune 500.

Find your entry point.

1. If you want one full-cycle system

Use Case 01 - RevenueOS. Pre-call research and post-call proposals, live and deployed.
Book a call at calendly.com/luka-espressio/30min

2. If you're a 2 to 5 person BD team

Start with Use Cases 02 and 03. Outbound personalization and post-call follow-up. Biggest time savings, lowest complexity.

3. If you're scaling (5 to 15 people)

Add Use Cases 04 and 05. Lead qualification and signal monitoring. Grow pipeline without growing headcount.

4. If you're crypto-native

Use Cases 08 and 09. Partner sourcing and community-to-pipeline. Almost nobody automates these yet.

5. If you're already using AI on basic tasks

Use Cases 06, 07, and 10. Coaching, competitive intel, and event follow-up. They compound over time.

About Espresso AI

Espresso AI builds AI workflows for growth teams. We came out of Lunar Strategy, a marketing agency that spent 7 years running campaigns, content, and BD for 300+ crypto and tech companies. That work taught us where teams lose the most time: research, content production, lead gen, and proposal prep. We started automating those workflows internally. They worked. Now we build them for other teams.

Let's look at your setup.

30 minutes. We'll map where your team is spending time on work AI can handle and show you which system to build first. No deck, no pitch — just your ops and what's possible.

[Book a call](#)

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