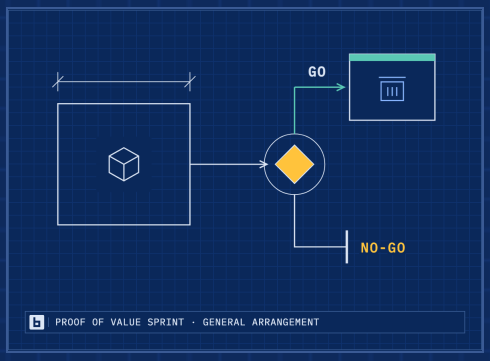
BridgeTek

SALES PLAYBOOK · FOR THE ACCOUNT TEAM

Example Company: claims triage

Lead with a four-week proof of claims triage on their own data. The Head of Operations owns the problem and the budget; the data team owns the extract. Win the proof, then the build.



PURSUE · INDEX 72 / 100

ACCOUNT	OWNER	DATE	STATUS
EXAMPLE COMPANY	[ACCOUNT EXECUTIVE]	OCTOBER 2026	SAMPLE · ILLUSTRATIVE

72
AI OPPORTUNITY INDEX · AIO-SAMPLE-01

3
PEOPLE TO REACH · THIS PLAYBOOK

4 weeks
PROOF TO GO / NO-GO · PROPOSED

01 · THE ACCOUNT AT A GLANCE

The account at a glance

SIGNAL	WHAT IT MEANS FOR THE PLAY	SOURCE
Claims backlog rising each quarter	A cost the sponsor already feels	Discovery call
Seven years of labeled claims	Triage can be proved on their data now	Data inventory
No model serving in place	Start as a batch job; serving comes in Deliver	Architecture review

02 · WHO TO TALK TO

Who to talk to

ECONOMIC BUYER

Head of Operations

Cares about: the backlog and the cost per claim.

Open with: "What would it be worth to clear the first pass of triage in a day, not a week?"

TECHNICAL OWNER

Data platform lead

Cares about: access, security, and not adding a platform to run.

Open with: the batch-first plan and what the extract needs.

USER

Claims team lead

Cares about: keeping the decision with adjusters.

Open with: the model does the first pass; the team keeps the call.

PARTNER

[Partner account manager]

Brings: the relationship and the infrastructure the build runs on.

Ask for: the intro to the Head of Operations.

03 · THE PLAY BY PHASE

The play by phase

1 · DISCOVER

One workshop: confirm owner, extract and cost model. Leave with a signed proof scope.

2 · PROVE

Four weeks on their data. The go / no-go review is the close.

3 · DELIVER

Build into the claims system with the partner's infrastructure; run it.

04 · BATTLECARDS

Battlecards

IF THEY SAY: WE'LL BUILD IT IN-HOUSE	WHAT WE BRING
◆ Agree it can be done in-house; ask who and by when. ◆ Offer the proof as the in-house team's head start.	Veteran data scientists who have built this kind of model, on their data, with a decision in four weeks.

IF THEY SAY: A PACKAGED TOOL DOES THIS	WHAT WE BRING
◆ Ask how it fits their own queues and claim types. ◆ Propose testing both against the same claims.	A model fitted to their data and queues, and no product to sell them. We don't resell the hardware, cloud or licenses we recommend.

IF THEY SAY: NOT THIS YEAR	WHAT WE BRING
◆ Size the backlog cost of waiting, with their numbers. ◆ Keep the proof small enough to fit this quarter.	A short, fixed-scope proof with a clear stop if it doesn't pay.

05 · OBJECTIONS

Objections and answers

OBJECTION	ANSWER
"Our data isn't ready."	The proof starts with a data check; if it isn't ready, that is the first finding.
"Adjusters won't trust it."	Adjusters keep the decision. The proof measures agreement with their calls.
"What does it cost?"	Pricing through your partners or on a call.

06 · PARTNER AND ISV FIT

Partner and ISV fit

NEED	WHO COVERS IT	FIT
Infrastructure for serving	[Partner]	80
Document capture	[ISV]	62
Claims system integration	[Systems integrator]	45

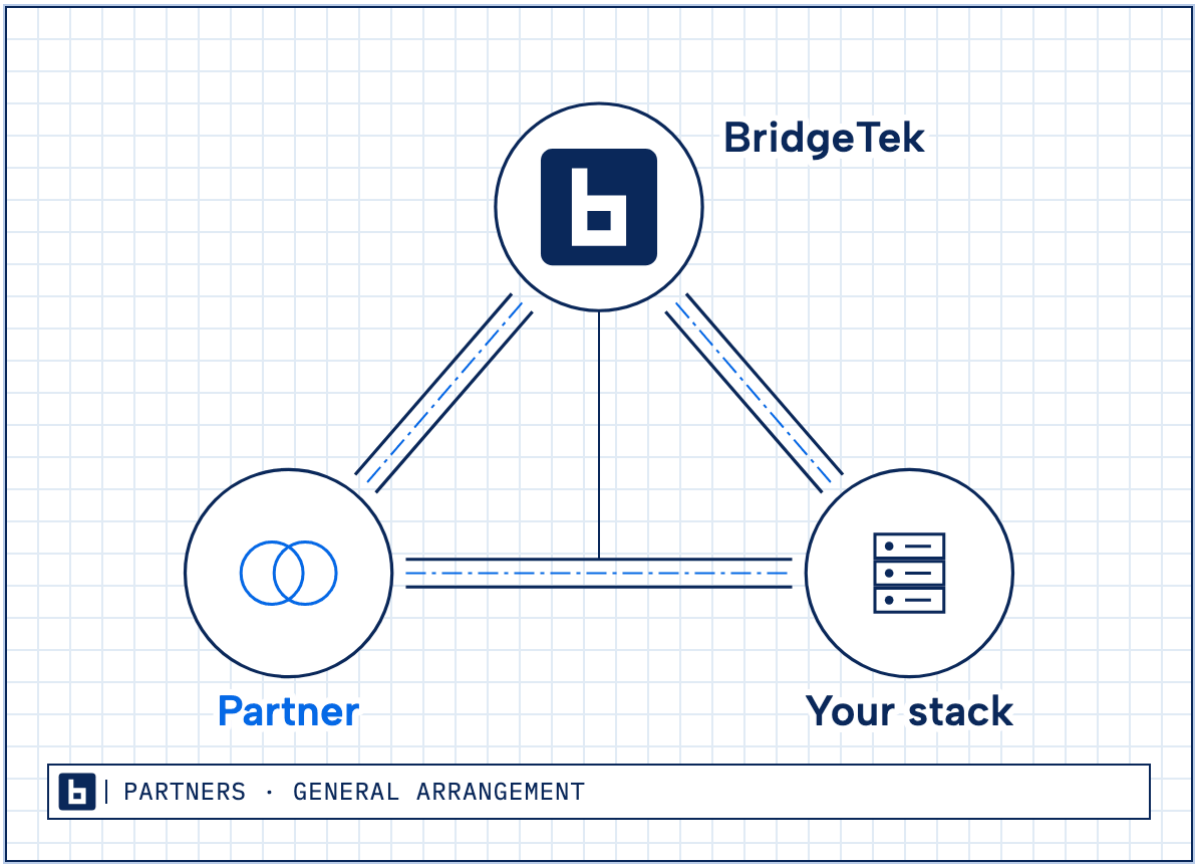
07 · NEXT STEPS

Next steps

1. **Partner intro to the Head of Operations**
   [Partner account manager], this week.

2. **Discovery workshop**
   [Account executive] and the BridgeTek lead, within two weeks.

3. **Signed proof scope**
   At the end of the workshop. The proof's go / no-go review is the close.



Who does what: the partner brings the engagement, BridgeTek does the work, and it runs on the stack the customer already has.

BridgeTek

Find it. Prove it. Ship it.

INTERNAL · NOT FOR CUSTOMER DISTRIBUTION

Questions about this play: [account executive], [email]@bridgetek.ai.

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