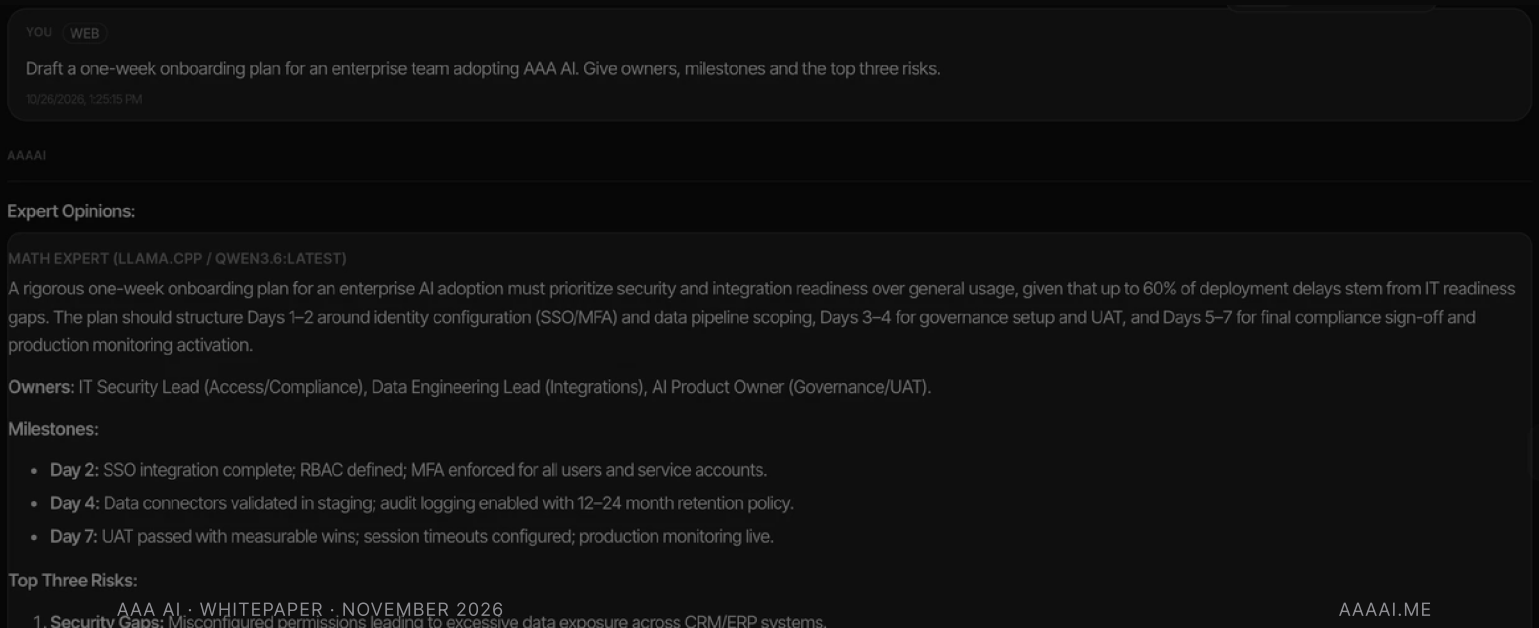
A|A|A AI

AAA AI · MARKETING & SALES · WHITEPAPER

The revenue operating system.

From signal to approved reply to closed-loop follow-up — with real integrations, one memory and an audit trail your revenue team can use.

163	3,000+	24	10
NATIVE INTEGRATIONS	CONNECTORS	EMAIL PROVIDERS	PRODUCT SURFACES



WHITEPAPER · 02

Revenue work is a loop, not a pipeline.

Leads arrive in email. Context lives in calls, docs and CRM. Campaigns ship from rooms. Follow-up is where most revenue is won or lost.

AAA AI puts those steps in one operating surface. The model can read the signal, prepare the brief, create the Plan issue, draft the reply, attach the recording and keep the audit trail — with human approval at the boundaries that matter.

THE LOOP

01 **Signal** — Gmail, Microsoft 365, Slack, web forms and product analytics arrive in one inbox.

02 **Brief** — Chat and Documents turn account context into a shared, editable brief.

03 **Action** — approved email, Plan issue, campaign checklist or Slack alert.

04 **Follow-up** — Meet recordings, AI notes and next steps stay with the account.

CONNECTORS IN THE LOOP

LAYER	SHIPPED CONNECTORS
Inbox	Gmail, Microsoft 365 / Outlook, IMAP, 24 providers
Conversation	Slack, Discord, Telegram, WhatsApp, webhooks
Revenue data	Attio, PostHog, Klaviyo, Snowflake
Assets	SharePoint, Google Drive, Notion Calendar, Miro, Webflow
Meetings	Meet with guest links, recordings and live AI notes

> "The handoff is the product. One account context, from first signal to the next meeting."

Connector availability depends on the workspace plan and configuration. The screenshots in this paper are actual AAA AI product UI captured in November 2026.

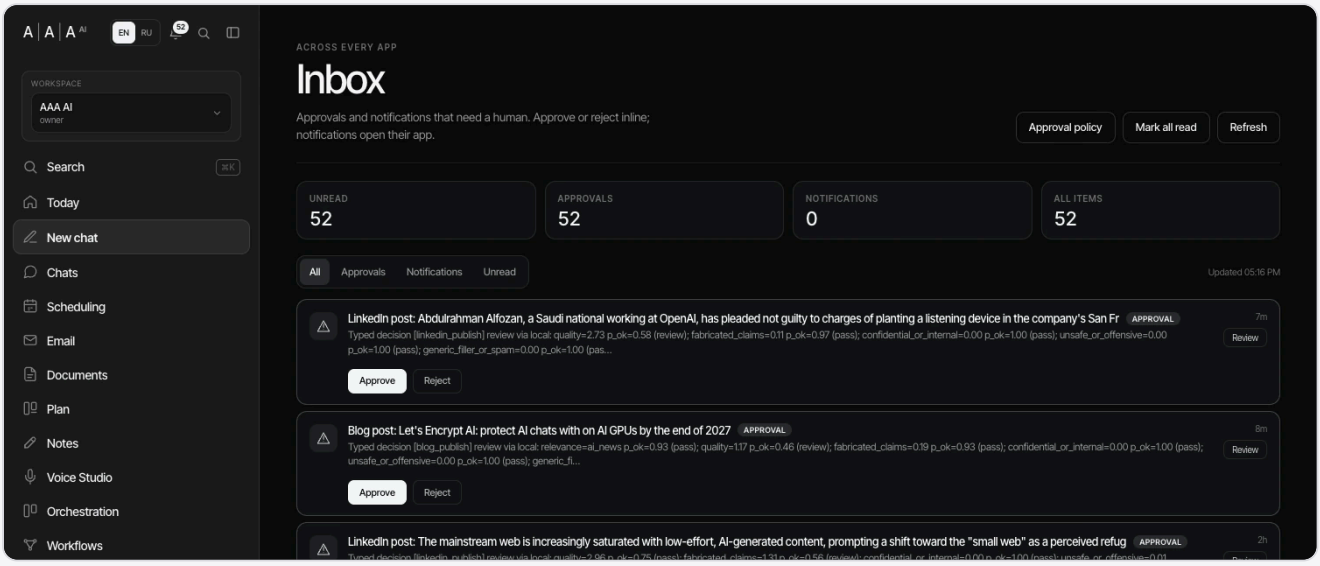
CASE 01 · INBOUND + APPROVALS

01

Signal → approval → action.

A lead writes to sales@. The draft, the account context and the next action land in one approval queue. Approve once; Plan, Slack and the audit trail receive the same decision.

Gmail / Microsoft 365 · Approval inbox · Plan · Slack · Audit



AAA AI INBOX · ACTUAL UI

52 APPROVALS ACROSS CONNECTED SURFACES

What the operator gets

The source message, model output and evidence in one card. Approve, reject or review without losing the thread. Nothing sends without the gate.

What the system records

The source, decision, owner and Plan issue stay linked. The next owner sees the same context, not a forwarded thread.

SHIPPED: APPROVAL INBOX · 24 EMAIL PROVIDERS

HUMAN IN THE LOOP: APPROVE

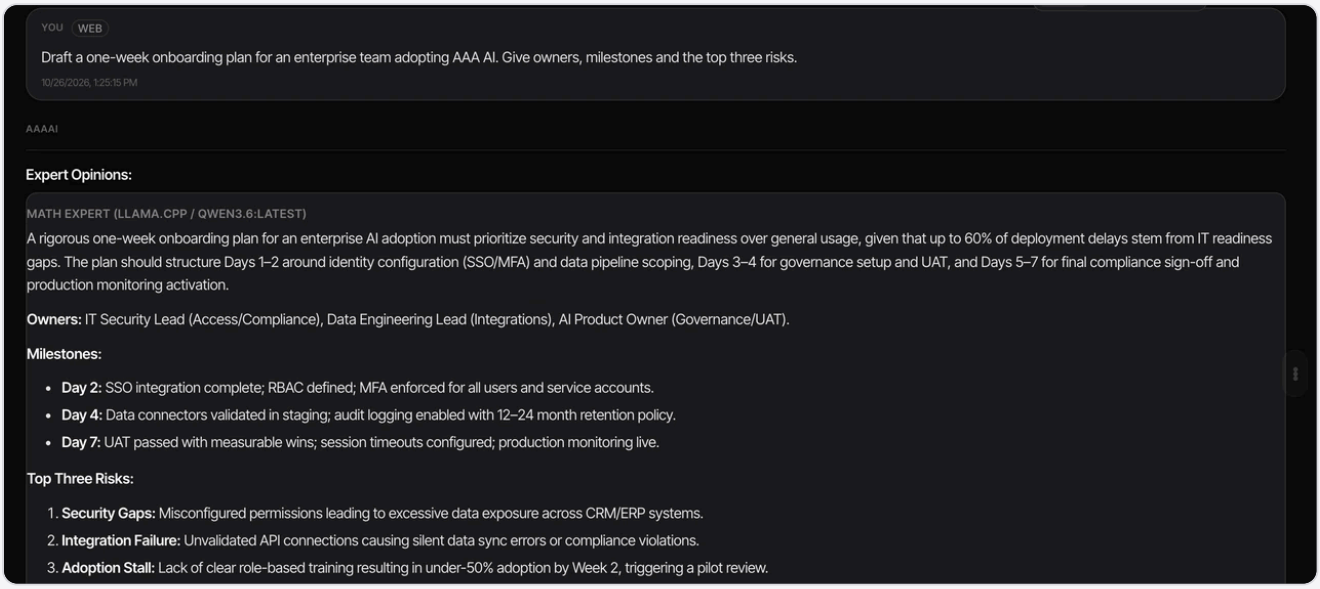
CASE 02 · CAMPAIGN ROOM

02

Brief → assets → launch checklist.

A campaign room combines the brief, the source material and the launch steps. The team can question the plan, draft the copy and keep every asset in the same account.

Klaviyo | PostHog | Webflow | SharePoint | Notion Calendar | Plan cycle



AAA AI CHAT · ACTUAL UI

BRIEF, SOURCES, DECISIONS AND NEXT ACTIONS

01

Brief from the room, not a blank doc.

02

Campaign assets stay attached.

03

Launch steps become a Plan cycle.

Use the same room to compare positioning, draft variants, attach the approved copy, and move the launch checklist into Plan. Every action is visible to the team.

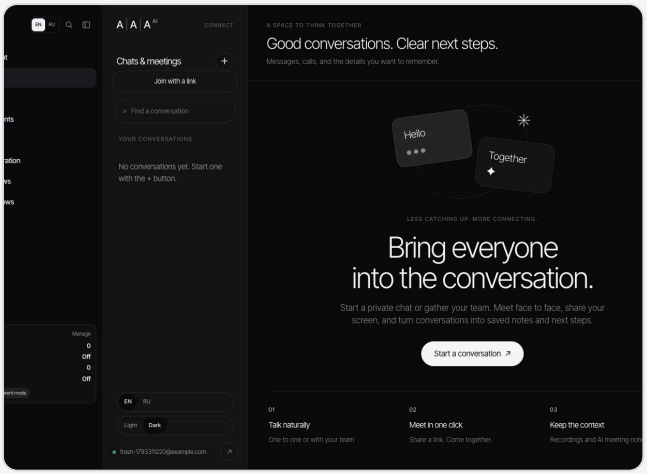
CASE 03 · CUSTOMER MEETING

03

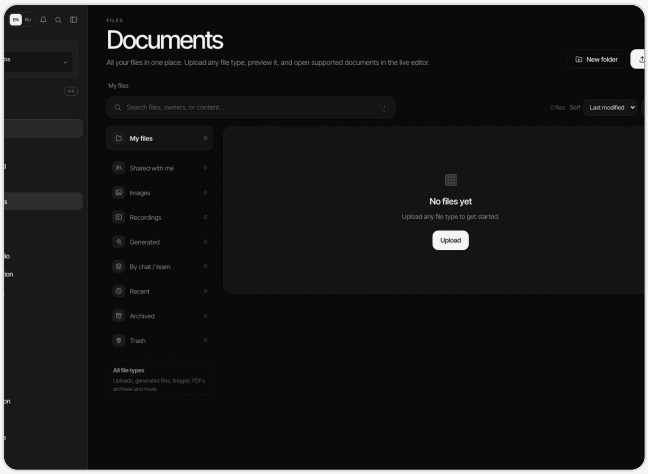
Call → recording → follow-up.

Meet keeps the conversation, recording and AI notes together. After the call, the recording is in Documents and the next steps can become a Plan issue or a drafted follow-up.

Meet · guest link | Recording consent | AI notes | Documents | Follow-up



AAA AI MEET · ACTUAL UI — IN-CALL NOTES AND RECORDING



AAA AI DOCUMENTS · ACTUAL UI — RECORDINGS, FILES AND ACCESS

Guests join by link

External buyers can join without an account. They enter a name, surname or email; the host sees who joined. No registration step for the customer.

The follow-up keeps context

Meeting notes, recording and action items sit beside the account documents. The next call starts with the history, not a search.

SHIPPED: GUEST LINKS · CONSENT · RECORDINGS · AI NOTES

HUMAN IN THE LOOP: CONSENT

WHITEPAPER · 06

From one rep to the revenue org.

Start with one team and one measurable loop. Add seats, shared context and governance as the work proves itself.

PILOT · 2 WEEKS

01 Connect one inbox and one Slack workspace.

02 Pick one inbound or follow-up loop.

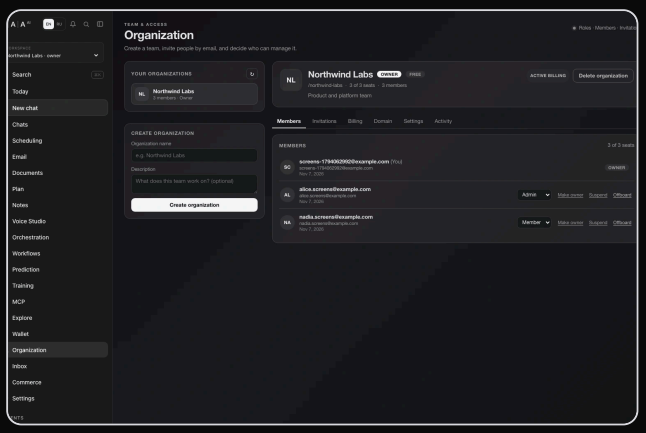
03 Measure approval time, response time and handoff quality.

SCALE

04 Add Plan, Documents and Meet context.

05 Invite the team; keep roles and approvals explicit.

06 Turn on analytics, audit and spend controls.



AAAAI ORGANIZATION · ACTUAL UI

SEATS, ROLES AND ACCESS

Roles

Owner / admin / member

Access

Domain join, seats

Audit

Activity and billing

Bring one revenue loop into AAA AI.

Start with a working pilot, not a platform migration. Marketing, sales and the operators around them share one account and one audit trail.

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