

How It Works

A quick look at the system behind your AI sales team.

Pipeline OS is not a collection of prompts. It's four connected layers — memory, data, workflow, and interface — that turn Claude into a sales team member who already knows your business, remembers every contact, and gets sharper the more you use it.

Open a blank AI chat and you get a smart stranger who forgets everything the moment the session ends. Pipeline OS removes that tax — it gives Claude a standing memory of your business, a live record of every relationship, a set of repeatable playbooks, and simple plain-English triggers to activate all of it.

The Four Layers

1 Memory — CLAUDE.md

Your standing brief. Claude reads it at the start of every session: who you are, what you sell, your ICP, your tone, and what you're focused on this week.

2 Data — Contacts.xlsx

Every relationship, every touchpoint, every deal — three linked logs that turn a spreadsheet into a queryable sales history.

3 Workflow — SOPs

Repeatable playbooks for the work that eats most of a sales week — prospecting, outreach, discovery prep, proposals, and more.

4 Interface — Skills

The plain-English front door to it all. Say what you need — Claude activates the right layers underneath.

The result: you say "give me my morning briefing," and Claude already knows your priorities, your pipeline, and which relationships need attention — because it read the files that make that possible before it answered.

This is the preview.

The full guide — including how the system compounds over your entire career and how to expand it yourself — ships with every System and Pro purchase.

Pipeline OS™ — pipelineos.ca