SALES INTELLIGENCE

AI Lead Intelligence for PEOs

Qualification, generation, and enrichment — built PEO-native, inside the CRM.

We turned the sales CRM into a **PEO-native lead engine**: it finds the right prospects from public data, scores them on the fit signals only a PEO understands, and hands the rep an AI read and a drafted outreach — all before a single manual list is bought.

The white space

Insurance brokers already pay for repackaged Form 5500 data — the model is proven; nobody has built it PEO-native with fit scoring on top. The dominant PEO-native CRM runs a rules-based sales motion with no AI scoring, and skipped its own sales product in its 2026 AI launch. No competitor reasons over census size, multi-state footprint, workers'-comp class, or benefits spend.

1 AI lead qualification

A fit score built from what a PEO actually cares about

- PEO-fit score (0-100) and tier on every opportunity, with rationale, gaps in the deal information, and a recommended next step.
- Reasons over the census: size band, multi-state footprint (compliance value), workers'-comp class risk, benefits spend, and quote reliability — not generic firmographics.
- One-click AI-drafted outreach (email or call script). The rep sends it; the AI never does.

2 Prospect Radar — lead generation

Mines free public data — no purchased lists

- Form 5500 (benefits filings), OSHA injury-and-illness data (WC risk), and WARN notices (restructuring) — zero data-licensing cost.
- Deterministic 0-100 ranking; the strongest signal is renewal timing — calling a prospect while they're actually shopping.
- Promote a ranked lead straight into a real opportunity and the qualify, enrich, and outreach pipeline, with a nightly refresh.

3 Enrichment

Fills the gaps the fit score needs

- Firmographics — headcount, industry, HQ, revenue — filled in from your own enrichment-provider account (BYO-key: you hold the data contract, we don't resell anything).
- Included with the platform; connect your own provider key to activate it.

Why it's defensible

Horizontal AI-sales tools score generic firmographics — the scoring engine and outreach plumbing are commodity. Our moat is the PEO-native signals: the census, workers'-comp class codes, multi-state compliance load, and benefits-renewal timing that only a PEO platform has. The pitch writes itself: *the CRM your industry runs on has no AI in its sales motion — ours scores PEO fit on the signals only a PEO understands, and finds leads from public filings the generic tools don't even look at.*