



## How sales teams can use Codex

Use Codex to turn account notes, calls, and renewal materials into a sharper meeting brief and follow-up.

### Why Codex for sales

Sales teams walk into customer meetings carrying a lot of scattered history. Calls, emails, usage notes, and decks all matter, but they are rarely in one place. Codex can turn that account context into a sharper brief, better deck edits, and follow-up before the details fade.

### Sample prompt set for a renewal meeting brief

I'm preparing for the April 22 Acme renewal meeting. Use the Acme account notes, April 14 Gong call, email thread, usage notes, renewal deck template, and account plan. Check Acme's site and recent news. Write a one-page brief with changes, priorities, questions, and risks.

Customize the Acme renewal deck and write speaker notes for the three key slides.

Write a two-minute account-team brief for the VP joining the meeting.

Draft a follow-up email with the promised link, open question, and next step.

Update the Acme account plan with buying group, tools, renewal date, and risks.

Create a next-step plan with owners, due dates, and the next customer touchpoint.



### Additional use cases

- 🔍 Research target account
- ⚠️ Spot renewal risk
- 📊 Build a QBR
- ✍️ Draft expansion plan
- 📞 Summarize call patterns
- 👥 Map buying group
- 👤 Brief executive sponsor
- 📍 Update territory plan