

# How to use Northstar

A walkthrough for Sales leads, Product managers, and executives: what to set up in your first session, where to look each day, what to bring to the weekly priority meeting, and when to bring in the AI agents.

## THE LOOP

Every page in the sidebar sits somewhere on one loop. Customer signal comes in, gets weighed by revenue, becomes a decision, ships, and the result is checked. Shipped work and stale signals feed the next round. Setup and Accounts feed all of it.

1 of 5

### Capture

[Signals](#) · [Activity](#)

Customer requests and conversations come in, tied to the account that asked.

2 of 5

### Weigh

[Overview](#) · [Priorities](#)

Every request is ranked by the revenue it blocks or unlocks.

3 of 5

### Decide

[Reframe](#) · [Backlog](#)

Check the request is the real problem, then move it into active work.

4 of 5

### Commit

[Roadmap](#)

Place the work in Now, Next, or Later, and see revenue with no product blocker.

5 of 5

### Check

[Align](#) · [Agent Control](#)

Clear stale items, tell customers what shipped, and review AI output.

Alongside the loop, Foresight and the Sales Agent work on live deals. Those two pages and Agent Control need cloud AI connected.

## WEEK ONE: GET TO A RANKED LIST

The ranking is only as good as the revenue attached to it. Get accounts in during your first session so every request after that is weighted from day one.

## First session About 45 minutes · admin

Open [Setup](#) and work the five steps in order. Later pages depend on the data you add in earlier ones.

In [Accounts](#), load your customers with ARR, by CSV or by connecting Salesforce, HubSpot, or Stripe from [Settings](#). Prospects with no revenue yet are fine: give them a CRM deal amount and stage and Northstar ranks them as weighted pipeline, labelled separately from confirmed ARR.

Log three or four real requests in [Signals](#), each tied to the account that asked.

If Engineering works in Jira, connect it in [Settings](#) so Backlog items link to tickets.

**You leave with:** A [Priorities](#) page with real dollar figures next to each request.

### THE RECURRING RHYTHM

Four habits keep the loop turning. None takes long, and each ends with something concrete.

## Daily 10 minutes · Sales and Product

Glance at [Overview](#). ARR at Stake and Priority One Deals tell you if something big moved overnight.

Sales reps: after each customer call, log what you heard in [Signals](#) and the meeting itself in [Activity](#), linked to the account and request. Classification runs in the background, so you never wait for it.

Product: skim new [Signals](#) for anything tied to a large account.

**You leave with:** No customer request lives only in someone's head or inbox.

## Weekly 45 minutes · Sales lead and Product manager

Open **Priorities** together and start at the top: these are the requests blocking the most revenue.

For the top two or three, run one practice from **Reframe** before committing. "Ask What's Missing" and "Analyze Positive Exceptions" catch most requests that are really a training, pricing, or onboarding problem.

Move the requests that hold up into active work on **Backlog**: set status, sprint, and points, and link the Jira ticket.

Check **Roadmap**. Confirm Now, Next, and Later still make sense, and look at Priority One deals: revenue with no product blocker is a Sales action, not a build.

**You leave with:** An agreed top three, with a reason both teams can repeat to a customer.

## Per deal As needed · Sales · needs AI connected

When a deal stalls, run it through **Foresight** for a ranked playbook from the predictor, product, sales, marketing, and GTM agents. Review the checkpoint queue before acting on it.

Paste objections from a call into **Sales Agent**. It sorts each one and drafts a reply, and nothing goes out until you approve it.

If an objection is really a missing feature, log it in **Signals** so it joins the ranking.

For new pipeline, use the prospecting tab in **Sales Agent** to score target accounts by fit and timing.

**You leave with:** A concrete next step for the deal, approved by a person.

Monthly

30 minutes · executive and team leads

Open **Align**. Signal Coverage shows how much of the backlog is tied to revenue, and the gap list shows what still isn't.

Clear Stale Signals: anything stuck in captured or under review for more than 30 days gets a yes, a no, or an owner.

For features shipped in the last 60 days, generate launch kits from **Roadmap** and tell the accounts that asked for them.

Review **Agent Control**: clear pending approvals, check flagged runs, and decide which agents need sign-off before their output is used.

**You leave with:** Customers hear back, nothing sits in review, and you can trust what the agents produce.

WHO LIVES WHERE

| ROLE            | HOME PAGES                                               | MAIN JOB IN NORTHSTAR                                                                            |
|-----------------|----------------------------------------------------------|--------------------------------------------------------------------------------------------------|
| Sales rep       | <b>Signals</b> , <b>Activity</b> ,<br><b>Sales Agent</b> | Capture what customers ask for, tied to the account, and work objections with an approved reply. |
| Sales lead      | <b>Priorities</b> , <b>Foresight</b> ,<br><b>Roadmap</b> | Make the revenue case in the weekly review and know what you can promise customers.              |
| Product manager | <b>Priorities</b> , <b>Reframe</b> ,<br><b>Backlog</b>   | Turn ranked demand into the right build, after checking it is the real problem.                  |
| Executive       | <b>Overview</b> , <b>Align</b> ,<br><b>Agent Control</b> | See revenue at stake and cross-team health, and keep AI output accountable.                      |