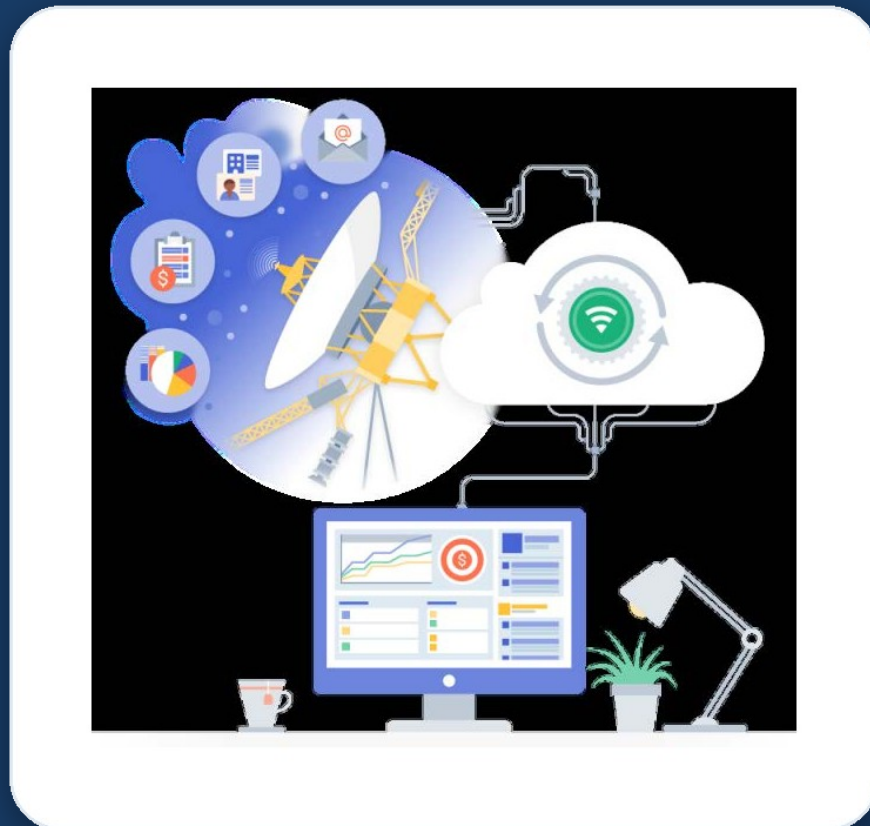


WHITE PAPER

COEVERA VOYAGER^{AI}

AI that collaborates, not just automates

The journey to the next frontier of sales CRM



Like its namesake space probe, Voyager AI sends intelligence back to the people who use it.

Before You Read Further: Where Your Data Goes

If you're considering AI inside your CRM, you're almost certainly asking one question first: when this AI touches my customer data, where does it go, and who else gets to see it?

It's the right question, and it deserves a straight answer before anything else. So here it is, in plain terms:

- **Your data is never sent to an outside AI company.** Voyager AI does not ship your accounts, deals, emails, or contacts off to ChatGPT, Google, or any public AI service. The AI runs inside the same secured environment that already runs your CRM.
- **Your data is never used to train anyone's AI.** Your records are processed to answer your request, and that's where it ends. Nothing you put into Coevera is used to make someone else's model smarter.
- **Your data is never kept by the AI after it answers.** Once a request is served, the model retains nothing. There is no copy sitting somewhere outside your control.
- **Your data stays in the region you choose.** Pick the United States and it stays in the United States. Pick Europe and it stays in Europe. We don't move it.
- **No third party and no outside AI provider ever sees it.** Access is locked down to a small, audited set of people on our side, and your administrators control who on your team sees what.
- **It's built to pass a security review.** Coevera is ISO 27001 and ISO 9001 certified, GDPR compliant, and HIPAA compliant, so the answers above aren't just promises, they're audited.

The bottom line

The rest of this paper explains how Voyager AI delivers genuinely useful AI on top of this foundation, and why we built it to collaborate with your team rather than work behind their backs. But if the only thing you needed to know was whether your data is safe, the answer is yes, and it never leaves the walls your CRM already lives behind.

ISO 27001

Valid to 26.01.2028

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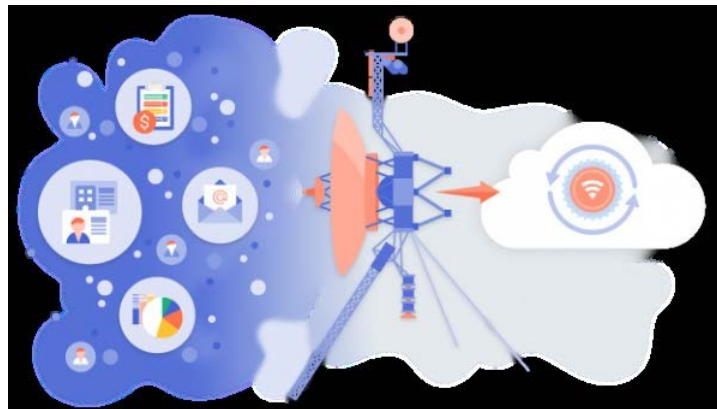
AWSPartner
Qualified SW

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AI Is Only as Good as the Data Beneath It

Artificial intelligence is only as good as the data it relies upon. The old adage of garbage in, garbage out is fundamental to its effectiveness. Without accurate data, algorithms cannot produce accurate output. Because AI consumes data at scale, the question of data management becomes more acute, not less. To put the power of AI to work on internal, private, and often limited datasets, you need the highest levels of accuracy and integrity in those datasets.



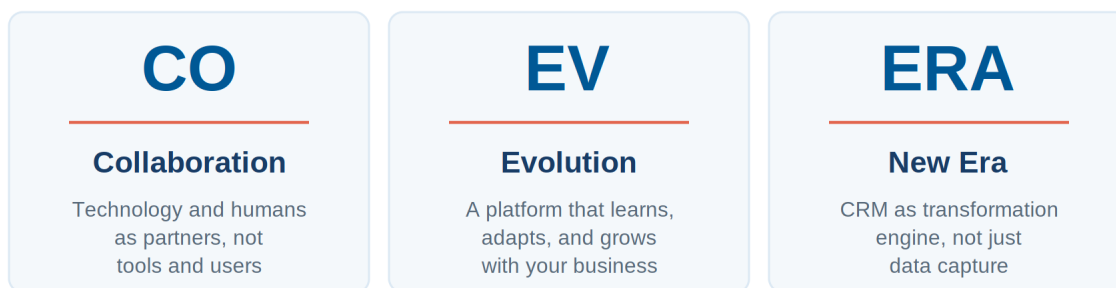
Technology should free people from repetitive work, not replace them.

This has been our conviction from the start. Long before AI was a line item on every vendor's roadmap, we built the foundations that make it useful: an automation engine to remove repetitive work, and a data layer designed to stay clean. The Automatizer was the first true no-code automation platform for repetitive sales tasks, and it set the direction for everything we have done in AI since. Automation should not replace people. It should free them from the work humans were never meant to repeat, so they can spend their time building relationships and closing business.

Clean data makes the rest possible. Datasets full of duplicates and errors degrade model quality and lead to false conclusions about how well a model performs. Legacy CRM has always struggled with data accuracy, which is why it depends on expensive, recurring, and often manual cleansing projects that only buy short-term relief. Our Duplicate Checker put accuracy in the hands of the user instead, with parameters each company defines for itself. Clean data is what brings the platform alive and what allows us to deliver AI that can be trusted.

From Pipeliner to Coevera

In 2026 Pipeliner CRM became **Coevera**. The name is not a coat of paint. It marks a shift in what a CRM is for. A traditional CRM captures data. Coevera is built to transform how a team sells. The name itself carries the idea:



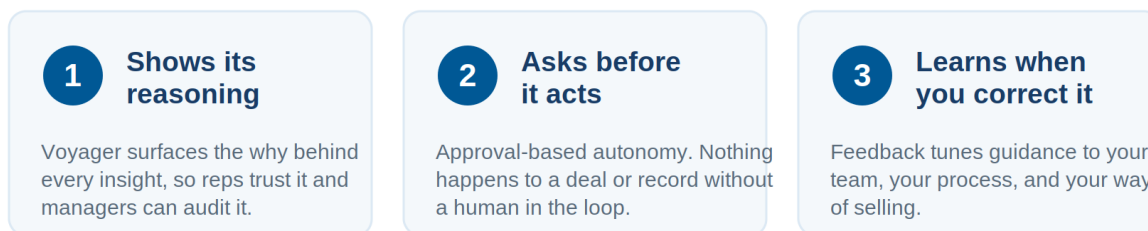
Where technology and people transform. That is the promise behind the rebrand. While other platforms still fight an adoption battle, Coevera is designed for teams that actually use it: visual pipeline management, intelligent guidance, and almost no learning curve. The result is a platform reps adopt in roughly thirty minutes, implementations measured in weeks rather than months, and a total cost of ownership about seventy percent below the incumbents. Voyager AI is the engine of that transformation, and it is where the rest of this document focuses.

The Coevera AI Philosophy: Collaborate, Don't Just Automate

Most CRM AI is a black box. It produces an answer, takes an action, and leaves the user to guess at the reasoning and hope the action was right. We took the opposite view. Voyager AI is built to collaborate with the salesperson, not to act over their head.

AI That Collaborates, Not Just Automates

The opposite of black-box AI



We chose the name **Voyager** deliberately. Like its namesake space probe, which travels far, gathers information, and feeds it back to the scientists who interpret it, Voyager AI constantly feeds actionable intelligence back to the people who use it. The human stays in command. The AI extends their reach.

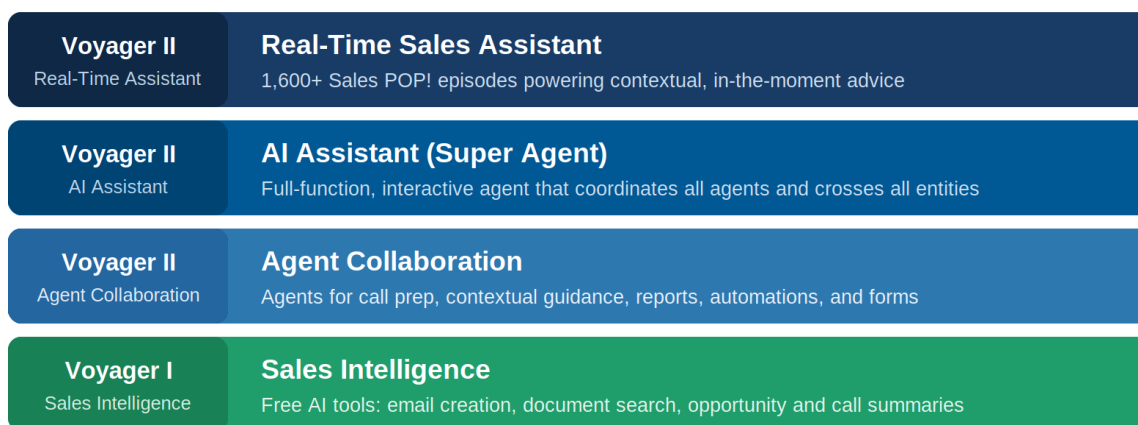
Why this matters for adoption

Sales teams do not adopt tools they cannot trust. When AI shows its reasoning, asks before it acts, and improves when it is corrected, reps treat it as a colleague rather than a threat. That trust is the difference between AI that sits unused and AI that changes how a

team sells.

The Voyager AI Capability Stack

Voyager AI is organized as four layers that build on one another. The base is free and always on. The advanced layers add agents, a coordinating super-agent, and real-time coaching drawn from a decade of sales expertise.



Free, always-on productivity at the base → advanced, credit-based agents and real-time coaching above

Sales Intelligence · Voyager I

A collection of free AI tools that assist the team and give time back: AI-assisted email creation, document search, opportunity summaries, and call summaries. These run for every user, on every subscription, at no extra cost.

Agent Collaboration · Voyager II

A set of agents that take on defined jobs: preparing for calls, providing contextual guidance inside a record, building reports, generating automations, and creating forms. Each agent works within the approval-based model, surfacing what it intends to do before it does it.

AI Assistant, the Super Agent · Voyager II

A full-function, interactive assistant that coordinates all of the agents and works across every entity in the CRM. Rather than a single-purpose bot, it is the connective layer that lets a user ask for an outcome and have the right agents marshalled to deliver it.

Real-Time Sales Assistant · Voyager II

The layer that sets Coevera apart. More than 1,600 episodes of **Sales POP!** expertise are indexed and embedded directly into Voyager AI, so the assistant can deliver contextual advice in the moment, inside the deal and during the call. We return to this in The Collaborator, below.

The Voyager AI Business Model

AI that is genuinely useful carries real infrastructure cost. The challenge for every CRM vendor is how to deliver meaningful AI to everyone while keeping the economics honest and predictable. Our answer is a structured, two-tier model that balances universal access with sustainable economics.

Voyager 1 AI Productivity Essentials FREE ● Included with every subscription ● 11 lightweight AI features ● No credit consumption, ever ● Enabled by default ● Drives adoption and satisfaction	Voyager 2 AI Advanced AI Suite CREDITS ● Credit-based consumption model ● 5 advanced agents and generation tools ● Free monthly allowance included ● Explicit opt-in, with hard spending caps ● Per-role controls in the Automation Hub
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Universal access, fair economics

Every customer gets meaningful AI at no extra cost through Voyager 1. This drives adoption and satisfaction, and it sets Coevera apart from competitors who gate all of their AI behind premium tiers. The advanced capabilities in Voyager 2 carry real cost, so they run on a transparent credit system. Customers who use advanced AI contribute fairly to the infrastructure that powers it, and they do so with full visibility and control.

The feature portfolio: 16 capabilities

Sixteen AI features are mapped across the two tiers. Eleven are free under Voyager 1. Five are credit-based under Voyager 2. In the administration interface, credit-consuming features are marked with a coin icon, so it is always clear which features incur cost.

Voyager 1 · 11 Free Features

Email Assistant	Text Tools	Speech to Text
Feed Tools	Text Analysis	Text to Speech
Email Categorization	Document Processing	Media Transcription
HTML to MJML	AI Coach	

Voyager 2 · 5 Credit-Based Features

Online Form Agent	Reporting Agent	Process Agent	Record Assistant	Screen Agent
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The credit system

The credit system is the economic engine of the model. It translates real infrastructure cost into a single, transparent unit.

- **Voyager 1 is always free.** Price is zero and credits are zero, regardless of usage volume.
- **A free monthly allowance is included.** It resets monthly from the subscription start date, and remaining credits and the next reset date are shown in the Customer Portal under AI Management.
- **A hard overage limit protects the customer.** When the limit is reached, Voyager 2 functionality stops and all subscription admins are notified. It is a safety net against unexpected cost, not a surprise on an invoice.

Granular administrative control

Voyager 2 is never on by default. An administrator enables it explicitly in the Automation Hub, with a clear cost warning, and then controls exactly how it is used.

On / Off Toggle any AI feature on or off for the whole organization	Per-Role Decide which roles can use which advanced agents	Spending Caps Set a hard overage limit. AI stops, admins are notified	Full Visibility Dashboards for credits by agent, user, and period
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Aligned with how the best software companies price AI

This is not an experiment. The model follows the same structure adopted by the most respected software companies pricing AI today.

Platform	Their AI model	Coevera alignment
HubSpot Breeze	Credit-based AI, free tier plus purchased credits	Same two-tier structure with credits
Figma AI	AI credit system with monthly allowances	Same monthly reset mechanism
Atlassian Rovo	Premium AI add-on with per-seat pricing	Same admin-control philosophy

For customer success

Voyager 2 must be explicitly enabled by an administrator in the Automation Hub. It is not active by default. When customers ask about advanced AI, walk them through enablement and explain the credit system transparently. The honesty of the model is part of the product.

The Collaborator: A CRM That Teaches You How to Sell

Most CRMs store data. Coevera transfers knowledge. We took more than a decade of Sales POP!, our content platform of over 1,600 expert episodes ranked in the top two percent of podcasts globally with more than 21 million views, and wired it directly into Voyager AI.

The result is real-time assistance that meets reps exactly where they are: inside the deal, during the call, at the moment it matters. Not a training portal they will forget, but a knowledge engine embedded in every workflow. Other CRMs have training portals that teach you the software. The Collaborator teaches the craft of selling, and it does so at the point of action.

- AI surfaces the right insight at the right moment.
- Guidance is built on real conversations, not generic templates.
- Reps improve with every deal, not just every training cycle.

Security: Your Data Never Leaves AWS

Underpinning everything Voyager AI does is a single, non-negotiable principle. Protecting customer data is one of our most important responsibilities, and with AI it becomes the deciding factor. The question every serious buyer now asks is simple: when your AI processes my data, where does my data go, and who else gets to see it? For Coevera the answer is equally simple. It stays inside your AWS environment, and no one else gets to see it.

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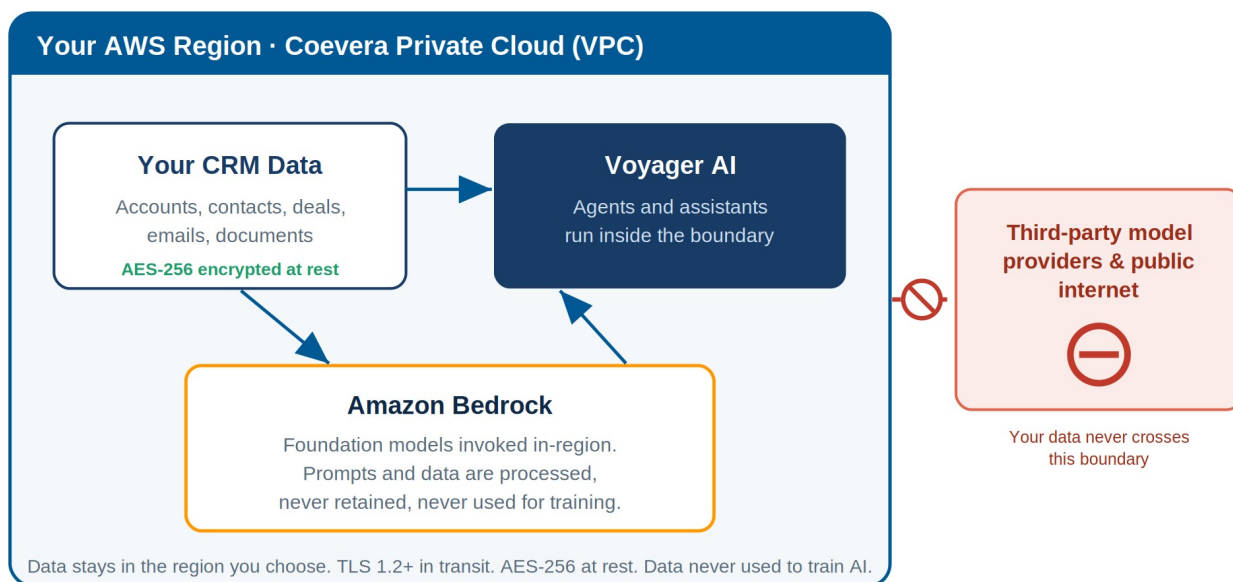
Compliant

AWS

Partner
Qualified SW

AI inference runs on Amazon Bedrock, in your region

Voyager AI does not send your data to a third-party model vendor over the public internet. Foundation models are accessed through Amazon Bedrock, inside Coevera's own AWS environment, in the region you have chosen. Your prompts and your records are processed within that boundary and stay within it.



Nothing crosses the boundary. Customer data is not transmitted to external model providers. It is not retained by the model after a request is served. And it is never used to train foundation models. This is the architectural difference between AI you can put in front of a security review and AI you cannot. By running inference through Bedrock inside our AWS perimeter rather than calling out to a public AI service, we keep your data under the same controls, in the same region, as the rest of your CRM.

Your data stays in the region you choose

Coevera runs on Amazon Web Services across North America (Virginia and Toronto), Europe (Frankfurt), and APAC (Sydney). Customers select their region, and we do not move customer data between regions. A customer who selects the United States has their data stored and processed in the United States. A customer in Europe has their data stay in Europe. The AI layer respects the same residency guarantee as the data layer.

Encrypted in transit and at rest

Data is encrypted at rest using AES-256, and in transit using TLS 1.2 or higher with 2,048-bit or stronger keys. Only standardized encryption protocols and algorithms are used. Passwords are stored as one-way hashes following industry best practice. Encryption keys are managed in a hardened Key Management System, with rotation tied to the sensitivity of the data and TLS certificates renewed annually.

Defense in depth, governed and tested

Security is governed by Coevera's Information Security Committee, a cross-functional body led by the Information Security Manager that meets regularly to prioritize and run a risk-driven security program. The program follows a defense-in-depth approach across administrative, technical, and physical safeguards.

- **Access on least privilege.** Employee access follows least-privilege and need-to-know, with multi-factor authentication, strong passwords, and VPN-controlled access to production. No customer data persists on employee laptops, and only a small number of senior engineers have direct production access, all of it logged for audit.
- **Customer-side controls.** Built-in login or SAML 2.0 single sign-on with multi-factor authentication, plus granular per-user privileges so each customer controls who sees what.
- **Secure development and testing.** Peer-reviewed code, continuous integration testing, two-factor-protected source repositories, and security testing that follows the OWASP methodology, verified periodically by top-tier third parties.
- **Continuous monitoring.** Automated monitoring, alerting, traffic blocking, process termination, and quarantine at predefined thresholds, with 24x7x365 incident response.
- **Resilience.** Synchronous real-time replication across geographically distributed data centers, automatic failover, uptime above 99.95 percent, and 35 days of encrypted backups with point-in-time restore.

Certified and compliant

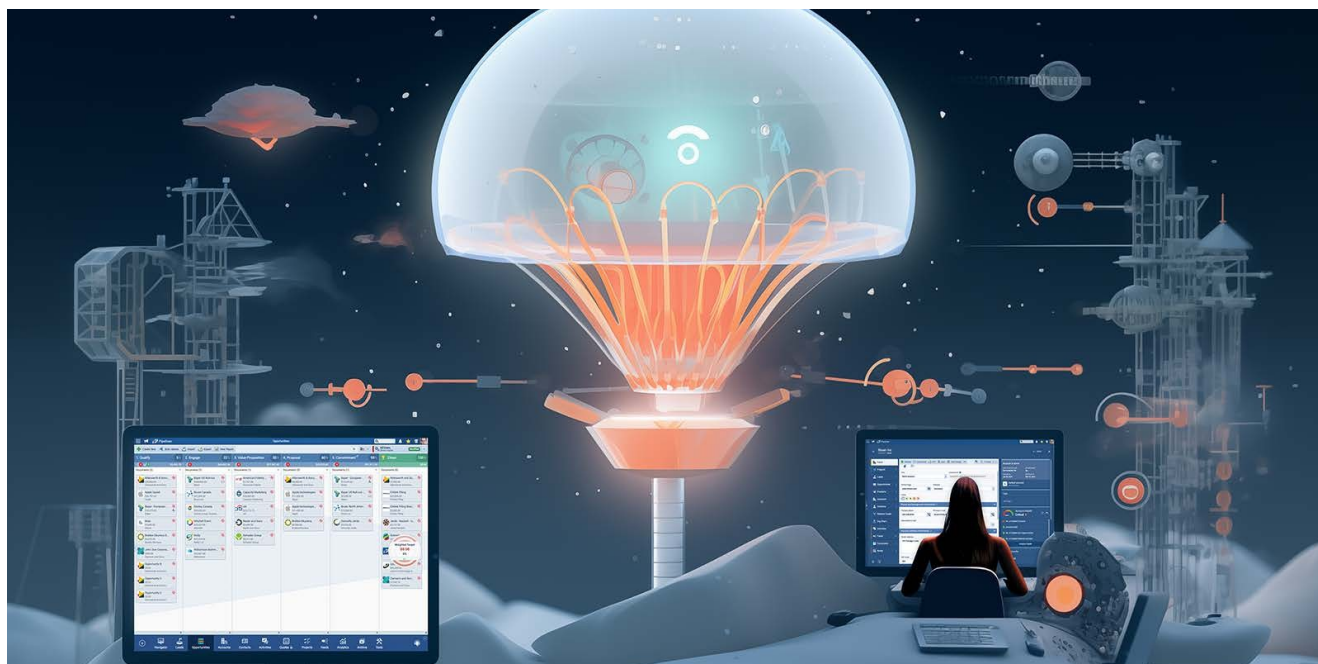
Coevera is certified to ISO/IEC 27001:2022 and ISO 9001:2015, compliant with GDPR, and HIPAA compliant for organizations that handle protected health information. Personal data is never sold to third parties, and as stated plainly across our platform, customer data is never used to train AI. Coevera is an AWS Partner and AWS Qualified Software.

The bottom line on security

Voyager AI gives your team modern, generative AI without asking you to ship your most sensitive data to someone else's model. Inference runs on Amazon Bedrock inside your chosen AWS region, your data never crosses the boundary, and it is never used to train anyone's model. Enterprise-grade AI, with enterprise-grade control.

Where Voyager AI Is Headed

Being a pioneer is in our DNA, and we intend to stay at the front of AI for sales. The platform is built on current technology and continuously future-proofed, which lets us add capability quickly without re-architecting around it.



The next frontier: proactive, conversational, and continuously learning.

Natural language, by voice and text

Natural language processing opens the door to interacting with the CRM in plain, conversational language, by voice as well as text. Picture a sales leader using a spoken query to generate a real-time report, then slicing it further with follow-up commands. The same techniques can automate data entry by extracting relevant information from emails, messages, and documents, saving time and reducing human error.

Machine learning that compounds

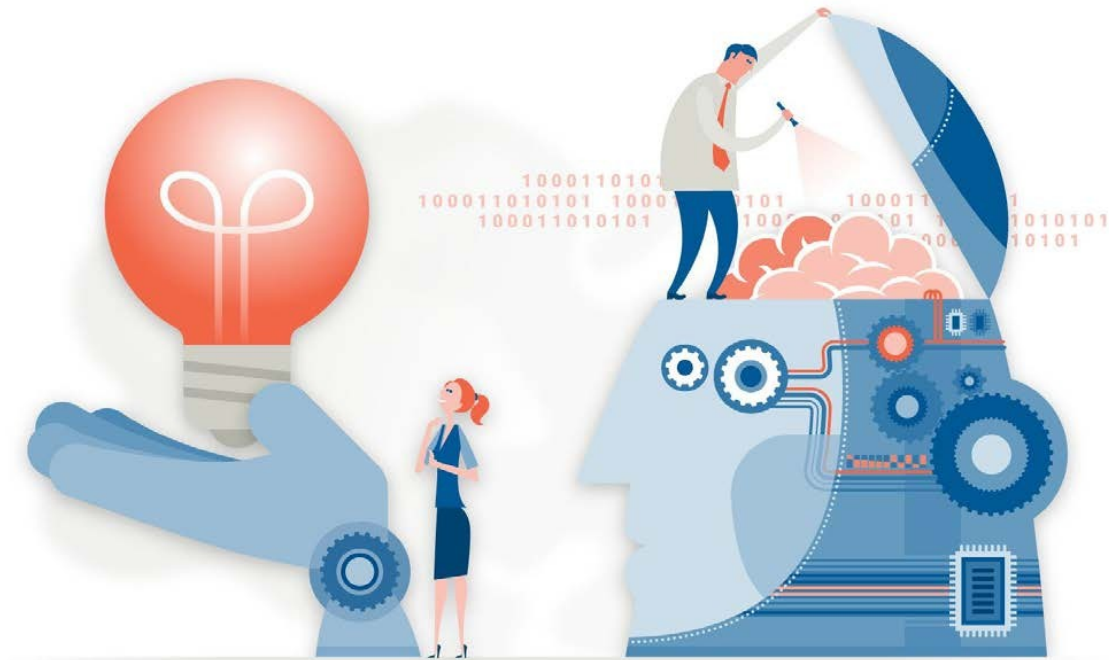
As the machine-learning layer matures, the system can identify routine processes and proactively suggest automations and workflows. That shortens the path to value, accelerates digital transformation, and steadily reduces the burden on the people using the platform. Because Voyager learns when it is corrected, each of these capabilities gets better the more your team uses it.

Conclusion

Unlocking the power of AI for sales rests on two foundations: accurate data and real automation. Without them, most AI claims collapse into shallow, point-solution features. With its first-to-market Automatizer and its Duplicate Checker for data accuracy, Coevera is built on exactly those foundations.

Coevera focuses on B2B consultative selling and brings together everything needed to run sales, from lead and contact management to pipeline, account, and sales management, with the industry's first true reporting and business analytics layer and our signature visual approach to data. Voyager AI is the natural extension of that work: AI that collaborates rather than replaces,

priced on a model that is honest and sustainable, and architected so your data never leaves your AWS environment.



The journey continues: intelligence gathered, interpreted, and sent back to the people who sell.

That is the difference. Not AI bolted on for the press release, but AI built into a platform that teams actually adopt, governed by controls a security team will sign off on, and grounded in a decade of real selling expertise. This is the next frontier of AI for B2B sales, and it is here.

