VENDOR CONDUCT ASSESSMENT | AUGUST 2026

The fabricated opener

A Microsoft marketplace vendor's AI read a post about another company's award, concluded the award was mine, and opened a sale on it

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REPORT DS-2026-61AD · 2026 · VERSION 1.0 · PUBLIC

About this report

Every substantive claim in this report carries an evidence classification and, where applicable, a numbered source. Facts are separated from vendor claims, third-party estimates, the author's assessments, and untested hypotheses. Forward-looking sections use scenarios with observable tripwires rather than point forecasts. Stated assumptions are listed before the analysis begins.

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Scope and evidentiary standard

This is a short story about a machine that read something I wrote, understood it backwards, and sold to me on the strength of the mistake. The company is WeTransact, a French firm that helps software vendors publish and sell on the Microsoft commercial marketplace. The message came from Cyril Breining, who lists his title as Head of Growth Americas. Everything in this report follows from eight words in his first sentence, and from the fact that he answered when I asked where they came from.

How this happened, in order

Ten months before any of this, I wrote a LinkedIn post about somebody else's good news. That post is the whole cause.

When	What happened	What it produced
About 10 months before	I post on LinkedIn about IgniteData being selected for the Microsoft for Startups Pegasus Program. My byline reads Founder, BeaconSpec.	A public document in which a BeaconSpec person names the program, on behalf of another company
Some time after	WeTransact's signal layer ingests the post.	The subject of the post, IgniteData, is swapped for the author's employer, BeaconSpec
12 Aug 2026, 8:42 AM	Cyril Breining messages me: BeaconSpec joined recently, congrats, you're a few months in, the credits were step one.	A dated membership history that does not exist, generated around the misattribution
12 Aug, 9:26 AM	I reply that I have no idea what he is talking about.	No response

When	What happened	What it produced
12 Aug, 12:11 PM	I check the Azure portal, find no eligibility, and ask one question: which database, which signal, which person.	Exhibits 1 and 2
13 Aug, 9:10 AM	He answers: the signal is LinkedIn posts by someone at my company mentioning the program. Offers a same-named company as the likely mix-up. Out of office until the 24th.	The source type named correctly, without the record
13 Aug, same morning	Using only his one sentence, I find the post in about ten minutes.	Homonym theory refuted, misattribution confirmed
24 Aug 2026	The signal review WeTransact set for itself.	Open at the time of writing

That is the entire sequence. The rest of this document is about why each step happened, what it cost, and what a buyer should take from it.

I am the recipient of the message. That is a disclosed interest, not a hidden one, and it shapes what follows in ways the Limitations section states plainly. It also means the central artifact is a primary document I hold rather than something reported to me second hand.

Two categories of published number appear here and both need discounting. The first is vendor self-reporting on customer counts and marketplace revenue. Nobody audits an ISV count, the definition of a counted ISV is set by the company doing the counting, and figures stated as floors ("450+") cannot be compared across dates without knowing whether the floor moved or the definition did. The second is the commentary literature on AI sales development, which is written almost entirely by companies selling either AI sales tools or the human services those tools displace. I use it to establish that a failure mode recurs, never to quantify how often.

What this report does not do: allege fraud, allege a crime, or claim that this message represents WeTransact's normal practice. I found no public complaint record against the company and I say so where it matters.

One structural note. I assessed the mechanism before the vendor explained it, and I was wrong. That analysis is left in place and scored rather than quietly corrected, because an estimate nobody checks is worth less than one that gets marked.

Label	Definition	How to treat it
FACT	Verifiable in the cited primary source: a filing, press release, official documentation, or standards body announcement.	Reliable as stated. Check the source if the exact wording matters.
VENDOR CLAIM	Reported by a vendor about its own business or product. Self-measured and not audited by any third party.	The vendor said it. Directionally useful, not a measurement. Definitions of the metric are usually undisclosed.

Label	Definition	How to treat it
THIRD-PARTY ESTIMATE	A research firm forecast or survey result. Methodology is proprietary and generally not reproducible.	Use for direction and order of magnitude only. Do not build a model on it.
ASSESSMENT	The author's reasoned judgment from the cited evidence. Falsifiable, and the reasoning is shown so it can be argued with.	This is analysis, not reporting. Disagree with it where your evidence differs.
HYPOTHESIS	A proposition offered for testing. Not currently supported by sufficient evidence to assert.	Treat as a research question, not a conclusion. Each one names what would confirm or refute it.
SCENARIO	A structured future state with a stated subjective probability. The probability is the author's judgment, not a calculated figure.	Use the leading indicators attached to each, not the probability. The indicators are observable; the probability is not.

Assumptions this analysis rests on

Five premises are assumed rather than proven. Each is followed by what fails if it is wrong.

The message is authentic and reproduced unaltered. If wrong, the entire report fails and nothing in it should be relied on. I hold the original in my LinkedIn inbox and it is quoted verbatim below.

BeaconSpec was not a Microsoft for Startups member on 12 August 2026. If wrong, the central finding collapses and the message was merely awkward rather than inaccurate. The Azure portal told me that morning that the account could not be used for Microsoft for Startups credits, and showed none of the states Microsoft documents for an applicant or a member. Both screenshots are reproduced in the analysis rather than described.

No public record links BeaconSpec to Microsoft for Startups. This assumption was wrong, and it is left standing here rather than deleted because the way it was wrong is the finding. I searched company databases, the vendor's site, Microsoft's documentation and the open web. I did not search my own LinkedIn posting history, which is where the record turned out to be. What I expected to follow from the assumption being wrong was that the claim would soften from fabrication to a data quality failure. That is not what happened. See "The vendor answered" below.

Cyril Breining holds the title shown on his profile and the message went out under his account. If wrong, responsibility shifts from a named individual to the company's systems. I regard that shift as likely in substance already, for reasons the analysis gives. Naming him is a matter of accuracy about who sent what, and readers should hold the company responsible for a template it deployed rather than the person whose account delivered it.

I do not assume this message is representative of WeTransact's outreach. There is no evidence either way, so nothing in this report rests on frequency, and readers should not infer a pattern from a sample of one.

The call

ASSESSMENT The claim was not invented from nothing. WeTransact's system read a post I wrote about another company winning a Microsoft award and concluded my company had won it. That is worse than a bad record, because a system that assigns the subject of a document to its author will do it again, to every company it profiles, and nothing downstream catches it. The vendor named the source type when asked, which counts for something, and has promised a review. I will move if that review produces an attribution fix rather than a keyword filter. Until then their signal layer should be treated as unaudited, because in the one case I can check, it inverted.

My judgment on the evidence here. There's data I can't see. New evidence can move me, including to the opposite position.

Executive summary

The interesting thing about this message is not that it was wrong. It is that it was wrong in the one place where the sender's own product claims to be strong, and that everything around the error is competent.

FINDING 1 **The company is legitimate and the credentials check out.**

FACT WeTransact was founded in 2023 by former Microsoft staff, sells a Microsoft marketplace platform, appears in Microsoft's own published customer stories, and was named Microsoft Startup of the Year for France in 2025. Anyone reading this as a scam warning has misread it. [5] [6] [8]

FINDING 2 **The only checkable claim about my company was false.**

FACT The opener stated that BeaconSpec had recently joined Microsoft for Startups and that I was "a few months in" with credits as "step one." The Azure portal told me that morning: "This account can't be used for Microsoft for Startups credits." No credit balance, no application banner, no member state of any kind. The screenshots are reproduced as Exhibits 1 and 2. [1] [2] [4]

FINDING 3 **The source was a post I wrote about a different company.**

FACT Asked where the claim came from, WeTransact said it came from LinkedIn posts by someone at my company mentioning the program. It did. Ten months ago I posted commentary on IgniteData being selected for the Microsoft for Startups Pegasus Program. The system took the subject of the post and assigned it to the author. [1] [17] [18]

FINDING 4 **Attribution inverted, and everything downstream was generated.**

ASSESSMENT A post about another company's award cannot yield "recently," "you're a few months in," or "the credits were step one." None of that was in the source. The retrieval step misidentified the subject and the generation step invented a membership history around the error, with no check between them. [1] [17]

FINDING 5 **The vendor sells the exact capability that failed here.**

> **VENDOR CLAIM** WeTransact's homepage offers "AI messaging and signals to create new opportunities" and account data on "who has budget, and who controls it." Microsoft's customer story describes the platform as built on Azure OpenAI Service. A firm selling signal quality sent a message whose signal was wrong. [5] [8]

FINDING 6 **The company's own headline numbers disagree with each other.**

> **FACT** Microsoft's December 2024 story cites over 300 ISVs. WeTransact's About page says 450+. Its homepage says 500+. The last two were live on the same day I checked. None is audited and none states what counts as an accelerated ISV. [5] [6] [8]

FINDING 7 **Existing rules already prohibit this, and none of them will be enforced.**

> **FACT** LinkedIn's Professional Community Policies say "Do not share content that is false, misleading, or intended to deceive." EU law has banned misleading business-to-business advertising since 2007, and the definition of advertising is wide enough to reach a sales message. Neither will produce a consequence at this scale. [9] [10]

FINDING 8 **The AI transparency rules that just took effect do not cover this.**

> **FACT** Article 50 of the EU AI Act became applicable on 2 August 2026, ten days before the message was sent. Its text-labeling duty is aimed at content published to inform the public on matters of public interest, and its marking duty falls on model providers. A private sales message sits outside both. [11] [12]

FINDING 9 **The one datum I could check is the one that tells you about the rest.**

> **ASSESSMENT** WeTransact's proposition is data an ISV cannot verify alone: which accounts hold committed Microsoft spend, who controls the budget, which sellers to call. A buyer gets exactly one free test of that data discipline, and it is the claim the vendor makes about the buyer's own company. That test was failed, publicly, in writing, in the first sentence. [5]

FINDING 10 **The vendor answered, and the answer made it worse.**

> **ASSESSMENT** He replied the next morning naming the mechanism accurately without being able to verify it, offered a same-named company as the likely mix-up, and said the signal would be reviewed. There was no apology. The homonym theory is refuted by the post itself: it was not another BeaconSpec, it was another company entirely, named in my own text. [1] [17]

The artifact

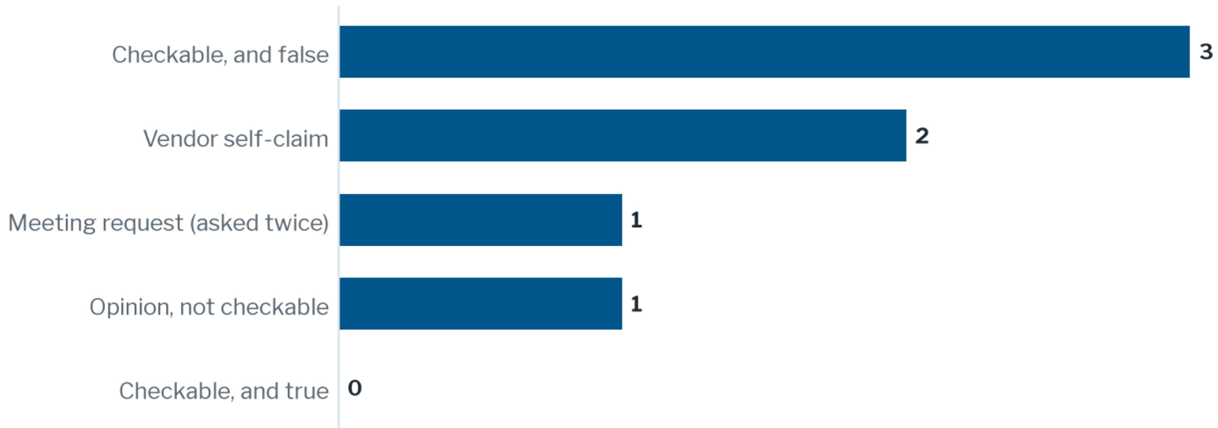
The message, in full, sent by Cyril Breining at 8:42 AM on 12 August 2026. It is reproduced complete, including the repetition, so that nothing here rests on my characterization of it:

"Hi David, BeaconSpec joined Microsoft for Startups recently, congrats. You're a few months in, the perfect point to set up the GTM side with us so it's live the day you graduate rather than a scramble after. Worth 15 min? The credits were step one, the marketplace + co-sell side is where the real Microsoft leverage is, and it's exactly what we help the program's ISVs stand up. Worth 15 min?"

FACT The message asks "Worth 15 min?" twice, in identical words, once mid-paragraph and once at the end. A human writing 78 words does not ask the same closing question twice. Two closers in one block is the signature of a template assembled from parts, where a hook fragment and a call-to-action fragment each carried their own ask and no pass removed the duplicate. [1]

FACT The message contains no question about me. Every sentence is a declarative statement about my company, my timeline, my priorities, or what I should do next: you joined, you're a few months in, this is the perfect point, the credits were step one, this is where the real leverage is. The only interrogative in 78 words is the request for a meeting, asked twice. [1]

FIGURE 1 **Seven assertions, none of them checkable and true**



ASSESSMENT The author's classification of the assertions in a 78-word message. The three false items are the membership claim, the "few months in" duration derived from it, and "the credits were step one," which presupposes both. Sorting assertions into these buckets is a judgment; the falsity of the three is not. [1] [2]

ASSESSMENT That is the tonal signature of assumed authority, and it is what makes the error land as an insult rather than a typo. A stranger opened by telling me facts about my own company, congratulating me for them, diagnosing where I stood, and proposing the remedy, in that order, with the confidence of someone reading from a file. When the file is wrong, none of that reads as helpfulness. It reads as a person who has decided what my situation is without asking, and the warmth of the delivery makes it worse rather than better.

ASSESSMENT There is a cost on my side of this that outbound arithmetic never counts. Establishing that the first sentence was false, working out that no public record could have produced it, and reconstructing what actually did, took the better part of six hours. The vendor's system spent no meaningful time asserting it. That asymmetry is the real economics of a generated claim: cheap to emit, expensive to refute, and the expense falls entirely on the person who did nothing wrong.

ASSESSMENT Strip the false premise and what remains is competent. The offer is specific, the timing logic is coherent, and the distinction it draws between Azure credits and marketplace co-sell is a real distinction that many founders genuinely miss. Whoever built the template understood the product and the buyer. That is what makes the opener worth writing about: the failure is isolated to the one component that had to be true about me.

ASSESSMENT The word doing the most work is "congrats." It converts an assertion into a social act, and social acts are harder to contradict than claims. A recipient who has in fact joined feels recognized. A recipient who has not is put in the position of correcting a stranger's warm greeting, which most people find awkward enough to skip. The construction is efficient whether or not it is true, and that asymmetry is the reason it is worth naming. [1]

The vendor, on the record

FACT WeTransact was founded in 2023 and is based in Lyon, France. It sells a platform that lists independent software vendors on the Microsoft commercial marketplace, manages private offers and Partner Center work, and pursues co-sell status with Microsoft sellers. Its published pricing starts at 149 euros per user per month billed annually, rising to 179 euros billed monthly, with an enterprise tier priced on application. [6] [7]

FACT Microsoft published a customer story about the company on 3 December 2024 describing the platform as built on Azure and using Azure OpenAI Service, and quoting chief executive Johan Aussenac saying the service "opens doors to building new kinds of partnerships directly from the marketplace." The company also holds a Microsoft Startup of the Year award for France in 2025. [6] [8]

ASSESSMENT This is a real business with real domain expertise, and the marketplace problem it sells against is a real problem. Publishing a transactable SaaS offer to the Microsoft marketplace and qualifying for co-sell is genuinely tedious, genuinely valuable, and genuinely beyond most small ISVs to do quickly on their own. Nothing in this report should be read as doubting that.

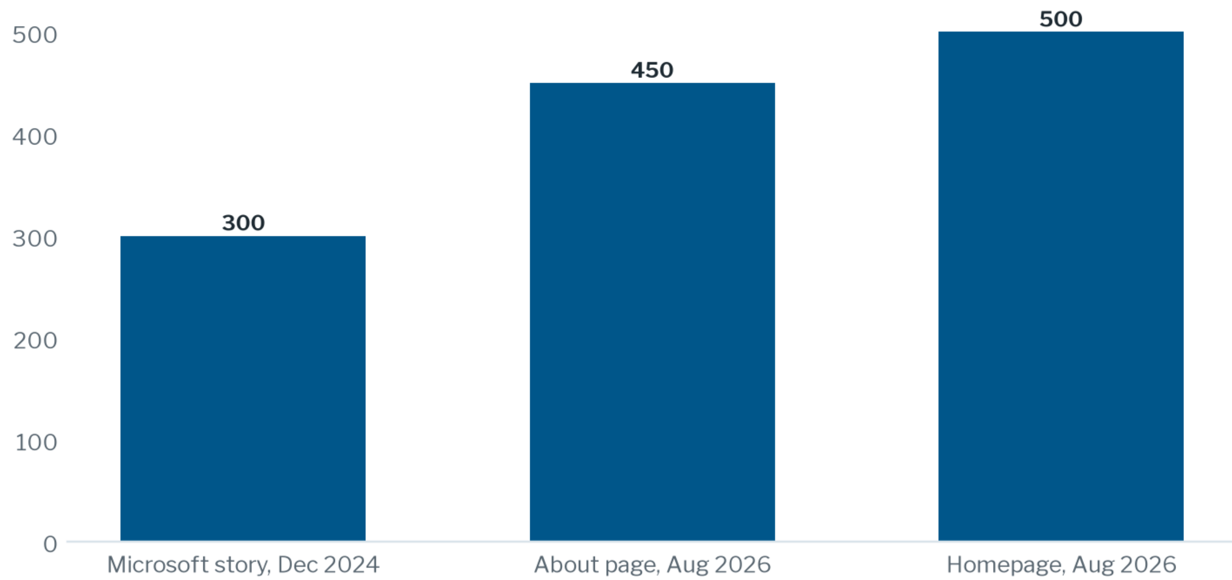
What the company says about itself

VENDOR CLAIM The homepage claims "1 in 10 SaaS companies on Microsoft Marketplace already run on WeTransact" and "500+ and counting." The About page claims "450+ ISVs accelerated their Microsoft GTM with us," "Almost 10% of SaaS Offers on Microsoft Marketplace are listed with WeTransact," and "+100M Marketplace Billed Sales generated in FY25." Customer results listed include "+320% Marketplace revenue in 4 months" for Solgari and "$4M pipeline in Marketplace" for Proventeq. [5] [6]

ASSESSMENT The 320 percent figure is the kind of number that should not move anyone. A percentage increase from an undisclosed base over four months is compatible with a rise from 10,000 dollars to 42,000, which would be an ordinary quarter, and with a rise from 2 million to 8.4 million, which would be extraordinary. The company does not state the base, and without it the number carries no information about what a buyer should expect. This is not specific to WeTransact; it is close to universal in marketplace GTM marketing, and it is why the sizing in this category should be discounted as a matter of routine.

FACT The customer count has been published as three different figures. Microsoft's story of December 2024 says over 300 ISVs. On 12 August 2026 the About page said 450+ and the homepage said 500+, on the same day, on the same site. [5] [6] [8]

FIGURE 2 **One company, three ISV counts**



VENDOR CLAIM All three are floors, published as "over 300", "450+" and "500+". Growth from 2024 to 2026 is unremarkable and expected. The gap between the last two is the finding: they were live simultaneously and differ by 50 ISVs, or 11 percent, with no definition of a counted ISV given anywhere. [5] [6] [8]

ASSESSMENT A 50-ISV gap between two pages of the same website is small and it is not evidence of dishonesty. It is evidence of something more useful to know: the company ships marketing copy faster than it reconciles it. That tendency is the same tendency that produces an opener asserting a fact nobody checked, and it is the reason I treat the message as a systems failure rather than a character failure.

ASSESSMENT The claims that survive scrutiny are the structural ones. Ex-Microsoft founders, a Microsoft-published customer story, a marketplace listing, and a national startup award are all things a third party has attested to. The claims that do not survive are the quantitative ones, which are unaudited, undefined, and internally inconsistent. That split is normal for a company at this stage and it is exactly what an evidence label is for.

What I could check, and what I guessed

What follows is the analysis as it stood before the vendor replied. It is retained unedited, including the part that turned out to be wrong, because a prediction scored afterwards is worth more than one quietly corrected. The resolution is the section after it.

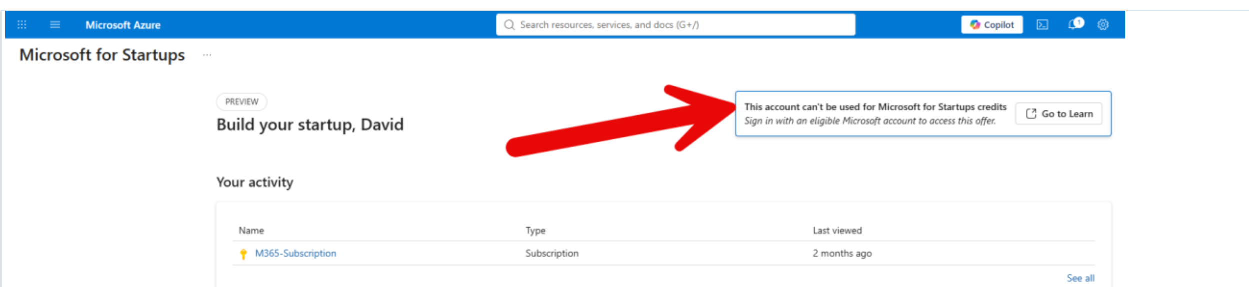
I asked the sender a single question: which database, which signal, or which person told him that BeaconSpec had joined. The question is answerable in one sentence by anyone who knows, and unanswerable by anyone who does not. In the absence of an answer, four mechanisms are worth testing, and each can be confirmed or refuted by evidence the vendor holds.

FACT The first mechanism, a public record, is refuted. Microsoft for Startups membership is administered in a login-gated portal, and Microsoft's documentation describes no public profile, badge, or directory of members. Microsoft's own program pages describe what a member sees inside the Azure portal, not what an outsider can see from outside it. [3] [4]

FACT Nor is there a company-side record. BeaconSpec's website describes a discovery and transaction layer for AI-driven commerce and mentions Microsoft nowhere, listing Google, Shopify, Walmart and Target as protocol partners. A web search on the company name returns an unrelated open-source link dump specification maintained by a German library consortium, and no company page at all. [13]

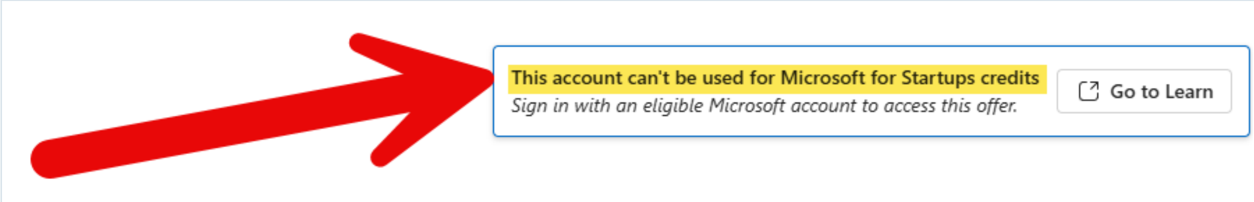
Public source checked	What it would have shown	What it showed
Microsoft for Startups portal and program docs	A member directory or public profile, if one existed	Login-gated administration only, no directory documented
beaconspec.com	A program badge or announcement, as many members post	No mention of Microsoft anywhere on the site
Web search on the company name	Press, funding notes, or a program announcement	An unrelated open-source specification, no company record
Azure portal, my own account	Credits, a balance, or an application banner	"This account can't be used for Microsoft for Startups credits"

EXHIBIT 1 The Microsoft for Startups page for my account, 12 August 2026



FACT Top of the Azure portal page, cropped to the region carrying the claim. Account identifier obscured; red arrow added by me. Note the absences: no credit balance, no application banner, and an activity list holding a single Microsoft 365 subscription. [2] [4]

EXHIBIT 2 The banner itself, enlarged



FACT The same banner at readable size, since its exact wording is what the finding rests on. Highlighting and arrow added by me; the text is unaltered. [2]

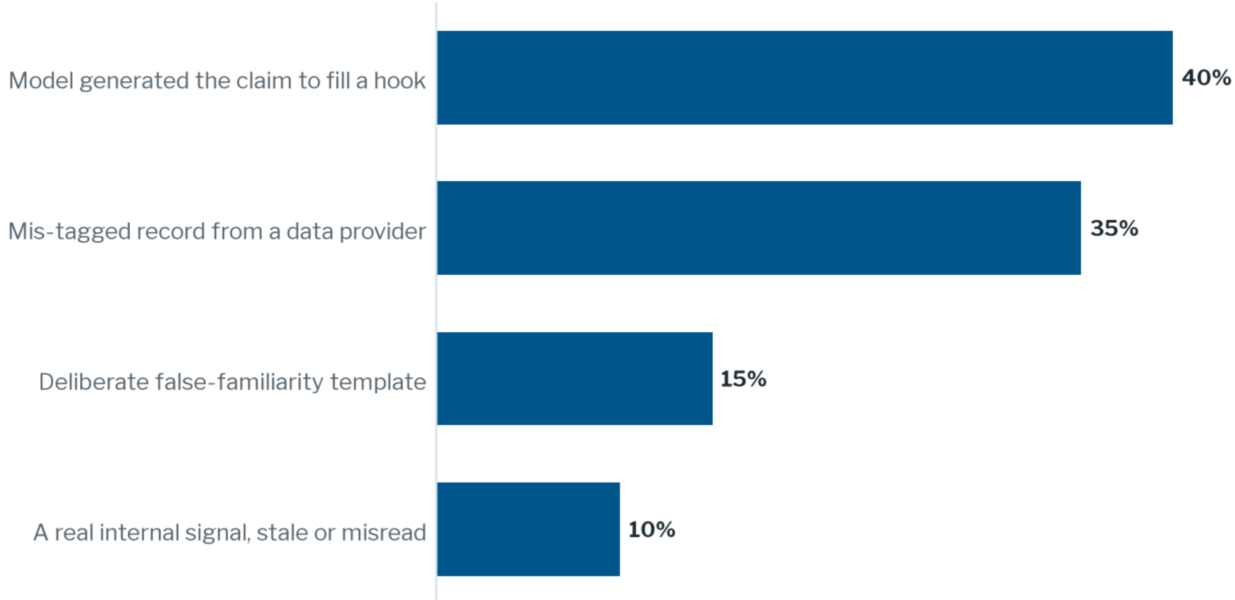
FACT The last row matters more than it looks. Microsoft documents three member-facing states: an applicant under review sees a 1,000 dollar starter balance and a yellow review banner, an approved startup sees a congratulations modal and a 100,000 dollar credit balance, and a returning approved startup sees a clean page with its remaining balance. None of the three is what I saw. The page offered no balance, no banner, and no application status, only a refusal and an invitation to sign in with a different account. [2] [4]

ASSESSMENT One honest qualification, because the wording carries it. The banner speaks about an account, not a company, so on its own it proves that the Microsoft identity I run BeaconSpec on cannot draw startup credits, not that no conceivable account anywhere enrolled the company. I am the founder and there is no other account, which is why I state the conclusion as fact rather than inference. A reader who wants the strictly documentary version should take the exhibits as showing this: on the morning the message arrived, the person it was addressed to had no credits, no application in flight, and no membership state to be "a few months in" to.

ASSESSMENT I weighed four mechanisms and got the ranking wrong, so they are summarised rather than argued at length. Most of my weight, 40 percent, went on a model inventing the hook outright, because the duplicated closing question showed nothing had read the output. Next, 35 percent, a mis-tagged record bought from a data provider. Then 15 percent on a deliberate false-familiarity template, which I named only because omitting it would have been dishonest. Last, at 10 percent, a real internal signal that was stale or misread.

ASSESSMENT The answer was the bar I ranked last, feeding the bar I ranked first. A real signal existed, it was read catastrophically wrongly, and a model then generated confident specifics on top of the error. My mistake was narrow and instructive: I treated retrieval and generation as competing explanations when they were sequential, and I never imagined a pipeline that would take the subject of a document and hand it to the author.

FIGURE 3 **My prior on the mechanism, before the vendor answered**



SCENARIO Subjective probabilities assigned before the reply arrived, kept here so the estimate can be scored rather than forgotten. The outcome was a hybrid of the bar I ranked first and the bar I ranked last: a real signal, catastrophically misread, with the specifics generated on top. I had the generation half right and the retrieval half badly wrong, because I never considered that a system would treat the subject of a post as its author. [1] [14] [15]

The vendor answered

At 9:10 the following morning, 13 August 2026, Cyril Breining replied. In full:

"Hello David, the signal is based on LinkedIn posts made by someone at your company mentioning the program. Maybe, the mistake comes from a homonyme company, being out of the office I can't check it precisely until the 24th."

"Thanks for the feedback, we'll be acting on it and reviewing our signal."

ASSESSMENT Credit first, because it is due and because it is the part most readers will skip. He answered inside a day, he named the mechanism correctly without being able to check it, and he committed to reviewing the signal. Plenty of companies would have sent nothing. The report's stated tripwire was whether the vendor could name a source, and he named one. What he did not do is apologise, and the substance of what he named turns out to be worse than the bad database record I had been expecting. [1]

FACT The signal exists and I found it in about ten minutes, using nothing but the sentence he gave me. Ten months before the message, which LinkedIn dates only as “10mo”, I published a LinkedIn post under a headline identifying me as Founder of BeaconSpec. Its subject was another company: "IgniteData Selected for Microsoft for Startups Pegasus Program: Agentic AI Powers Archer." The post is commentary on that selection, aimed at healthcare leaders, and it links to IgniteData's announcement. [17]

FACT The post says nothing about BeaconSpec joining anything. The only company named as being selected for Microsoft for Startups is IgniteData. My company appears in the post only as my own job title in the byline. [17]

What the post actually said	What the system concluded	Gap
IgniteData was selected for the Microsoft for Startups Pegasus Program	BeaconSpec joined Microsoft for Startups	Subject of the document swapped for its author
Posted ten months before the message	"joined ... recently", "You're a few months in"	Recency and duration invented; the real date contradicts both
No mention of credits, spend, or benefits of any kind	"The credits were step one"	A membership history generated around the error
Pegasus Program, a specific selective track	Generic program membership with a graduation date	Program detail flattened, then extrapolated

ASSESSMENT This is the finding, and it is a different and larger thing than the one I went looking for. I had assumed the worst plausible case was a wrong row in a bought database, which is a supply chain problem and somebody else's fault. What actually happened is that the system read a document correctly, identified the right program, and then attached it to the wrong entity, choosing the author over the subject. Every company that writes about its industry is exposed to that error, and writing about other companies' achievements is what most founders on this platform do all day.

ASSESSMENT The homonym explanation does not survive contact with the post. He suggested the mix-up might come from a same-named company, which would have been the benign reading and would have made this a disambiguation bug. It was not another BeaconSpec. It was IgniteData, named in my own text, in a post whose entire subject is that another company received the recognition. There is no name collision to blame.

ASSESSMENT The generated layer is what turns a retrieval bug into a false statement. Even granting the misattribution, nothing in that post supports "recently," nothing supports "you're a few months in," and nothing supports "the credits were step one." Those were manufactured to make the opener feel researched. A system that had merely misattributed would have produced a vague and roughly harmless sentence. This one produced a specific, dated, benefit-bearing account of a membership that does not exist, which is the difference between a bad lookup and a fabrication.

ASSESSMENT One detail I would leave out if it were not documented. The post the system misread is about governance of agentic AI. It asks readers, in a numbered list, "What guardrails ensure attribution, reversibility, and auditability?" An AI outbound system read that post and failed at attribution. I am not going to pretend that is not funny, and it is also the cleanest illustration available of the gap between writing about guardrails and building them. [17]

HYPOTHESIS The behaviour generalises beyond me, and it is testable by anyone. If the pipeline promotes any program, award, or funding event named in a person's post into an attribute of that person's employer, then founders who post about industry news are systematically mislabeled in this vendor's data. Confirmed if other recipients report openers congratulating them on things they wrote about rather than received. Refuted if WeTransact's review shows the misattribution was specific to this record. The vendor said it would review the signal and could not check until 24 August, so the answer exists and is dated.

What the rules say, and what they miss

FACT LinkedIn's Professional Community Policies state "Do not share content that is false, misleading, or intended to deceive," and separately prohibit "untargeted, irrelevant, obviously unwanted, unauthorized, inappropriate commercial or promotional, or gratuitously repetitive messages." A direct message asserting a false fact about the recipient's company in order to open a sale sits inside the first clause on its plain wording. [9]

FACT European law has prohibited misleading business-to-business advertising since December 2007. Directive 2006/114/EC defines advertising as "the making of a representation in any form in connection with a trade, business, craft or profession in order to promote the supply of goods or services," and misleading advertising as any advertising that "in any way, including its presentation, deceives or is likely to deceive the persons to whom it is addressed" in a way "likely to affect their economic behaviour." The directive protects traders, and WeTransact is established in France. [10]

ASSESSMENT A cold sales message fits that definition without strain. Whether one opener rises to affecting economic behaviour is a real question I would not want to argue on a single message. The point of citing the directive is that this conduct sits inside the law rather than in a gap, and a company treating a false assertion about a prospect as a cost of doing outbound is making a legal assumption as well as an ethical one.

FACT Article 50 of the EU AI Act became applicable on 2 August 2026, ten days before this message was sent, with an extended deadline of 2 December 2026 for machine-readable marking of systems already on the market. The obligations are narrower than the coverage suggests. The text-labeling duty attaches to AI-generated text published to inform the public on matters of public interest, and the marking duty falls on the provider of the model rather than the business deploying it. [11] [12]

Rule	What it covers	Does it reach this message	Who acts
LinkedIn Professional Community Policies	False, misleading or deceptive content; unwanted commercial messaging	Yes, on the plain wording	LinkedIn, on report

Rule	What it covers	Does it reach this message	Who acts
Directive 2006/114/EC	Misleading B2B advertising, defined broadly enough to include sales representations	Arguably yes, untested at this scale	National authorities or courts
EU AI Act, Article 50	Disclosure of AI interaction; marking of synthetic output; labeling public-interest text	No, a private sales message falls outside	Providers, then market surveillance
Microsoft Partner agreements	Conduct of partners representing Microsoft programs	Unknown, terms are not public	Microsoft, if it chooses

ASSESSMENT Read that table honestly and the conclusion is uncomfortable. The one rule that plainly covers the conduct is a platform policy enforced by a report button, and the one rule with real teeth is a directive nobody invokes over a single direct message. The AI transparency regime that arrived this month, and that most readers assume covers precisely this, does not. The gap is not that fabricated commercial claims are legal. It is that at the volume and unit size of outbound prospecting, no enforcement mechanism has a matching economics.

What this says about delivery

ASSESSMENT One message licenses a narrower inference than anger wants and a wider one than the vendor would like. Here is the exact width.

ASSESSMENT The chain is short. WeTransact's core proposition is privileged data: which accounts carry committed Microsoft spend, who controls that budget, which Microsoft sellers to approach. None of that is checkable by the buyer before purchase, which means the entire offer runs on trust in the company's data discipline. Outbound prospecting is the one place that discipline is exposed to inspection for free, because the vendor is making a claim about the one company the buyer knows everything about. WeTransact ran that test on me and asserted something false in the first eight words.

ASSESSMENT So the honest read is a shift in prior, not a verdict on the product. Before this message I had no view of WeTransact's data quality. After the explanation I hold something more specific than I did before it: their enrichment layer misidentified the subject of a document as its author, and their generation layer built a dated membership history on top of that error with nothing in between to stop it. That is a description of an architecture, not an anecdote, and it applies to every profile the system builds. The burden is now on the company to show the review it promised changed the architecture rather than added a keyword filter.

Either they used their own platform, or they did not

ASSESSMENT There is a question here the vendor can answer in one sentence and has not been asked publicly before now: did this outreach run on WeTransact's own product? The homepage sells "AI messaging and signals to create new opportunities" and account data on who holds committed Microsoft spend. If the message came out of that system, the defect is in the thing they sell, demonstrated on a prospect, and every customer paying for those signals is exposed to the same misattribution. There is no version of that which is a marketing problem. [5]

ASSESSMENT If it did not come from their own system, the answer is worse in a quieter way. A company whose entire proposition is that it finds and qualifies the right accounts would be declining to use that capability on its own pipeline, which is a statement about internal confidence that no case study can offset. Buyers are entitled to ask which it was, and to treat a vague answer as an answer.

HYPOTHESIS Both branches are testable and the test costs the vendor nothing. Confirmed either way by naming the system that produced the message. I have not asked this question directly and am publishing it so it can be asked; I would update this section on a straight answer in either direction, and the branch I would find most reassuring is an admission that it was their own platform, coupled with the fix.

As an AI implementation, this is the textbook failure

ASSESSMENT Strip the vendor out and this is a clean case study in deploying language models badly, which is worth stating because thousands of teams are currently making the identical mistake. The retrieval half did its job and found a real document. The reasoning half then answered a question the document does not answer, which is who the program belongs to, and the generation half wrote confident specifics around that answer because confident specifics are what it optimizes. Nobody built a step that asks whether the entity in the output is the entity in the source. That check is trivial and its absence is the whole failure.

ASSESSMENT The competent version of this build is not complicated and is not expensive. Facts about the recipient come from a retrieval step with a record identifier attached, the generator is permitted to phrase them and forbidden to originate them, and any message containing an unsourced factual assertion about the recipient fails a check before send rather than after. Teams that skip that gate are not moving faster, they are borrowing credibility from their brand at an interest rate they cannot see until a recipient writes it up.

Where I land as a buyer

ASSESSMENT This is one buyer's decision on one interaction, and it is worth separating from the analysis so readers can take the evidence and reach a different conclusion. Mine is that I will not buy from this company. Not because of the error, which is forgivable and cheap to fix, but because the error occurred at the exact point where the vendor was demonstrating the capability it sells, and because the sourcing question that would resolve it has gone unanswered. Someone else may reasonably weigh the marketplace listing service on its merits, judge the outbound irrelevant to it, and buy. The evidence in this report supports that reading too, and I would rather a reader disagree with me having seen the exhibits than agree with me having seen a summary.

Leading indicators

Observable events, none of which need private information. Anyone can watch for these.

If this happens	It means	Moves toward	Status
The vendor names a provider and a record	A sourcing chain existed	Data quality failure, not fabrication	Fired, partly. Source type named, record not produced
Other ISVs report the same opener with their own names	The claim is templated, not researched	Deliberate device or ungated generation	Open. Watch comments on this report
The vendor answers but cannot name a source	No retrieval step existed	Model generated the claim	Did not fire. A retrieval step exists; it misattributed
The promised signal review lands, or does not, after 24 August	Whether the fix is attribution or a filter	Systemic correction, or cosmetic one	Open. The vendor set this date itself
Microsoft tightens partner outreach conduct terms	The platform owner sees a pattern	Category-level correction	Open. Partner Center announcements

Implications

For ISVs and founders receiving this kind of outreach

ASSESSMENT Check the one checkable thing. Most cold outreach contains exactly one falsifiable assertion about you, and testing it takes less time than reading the rest of the message. If it fails, you have learned something about the sender's data discipline that no amount of case study reading would have told you, and you have learned it for free. If it holds, you are talking to someone who did actual work, which is rare enough now to be worth a meeting on its own.

ASSESSMENT If you are evaluating any vendor whose product is data you cannot audit, make provenance a diligence item and not a vibe. Pick three signals from their platform, on accounts you know well, and ask them to show where each came from and when it was last refreshed. A vendor with real data discipline answers in a meeting. A vendor without one will offer confidence language instead of records, and you will have learned the same thing I learned for free, before signing rather than after.

For go-to-market leaders running automated outbound

ASSESSMENT The rule that would have prevented this is one line long: a generated message may not assert a fact about the recipient's company unless that fact carries a source record. Not a confidence score, a record. Everything else in the message that failed here was cosmetic, and everything that worked was structural. The verification gate is cheap to build and it is the only part of the stack that protects the brand.

ASSESSMENT Treat the duplicated call to action as a canary. When a template emits the same ask twice, no human read the output before it sent, and if no human read the output then no human checked the premise. Repetition is easy to detect programmatically and it correlates with the failure that actually matters.

ASSESSMENT Ask, do not assert. "Are you in Microsoft for Startups? If so, this is the moment to set up the marketplace side" carries the same hook, works on the same segment, and cannot be false. The vendor gives up a small amount of warmth and eliminates the entire failure mode. That trade is available to every team running this play and almost nobody takes it.

What this document cannot answer

Four questions need evidence I do not have, and the first is the one the whole report turns on.

Whether the misattribution is systemic. WeTransact has explained this record and promised a review it could not begin before 24 August. What no outsider can see is whether the pipeline treats every program named in a founder's post as an attribute of that founder's employer, or whether something specific to my record went wrong. That is one query against their own corpus and it would settle the largest open question here.

Whether the outreach is representative. I have a sample of one message and one explanation. Establishing frequency needs other recipients or a look at the sequence itself, and until one of those exists no reader should treat this as a description of how WeTransact sells.

Whether anyone senior has seen an example. The reply came from a seller who was out of the office and could not check his own system, which tells me the explanation was offered from knowledge of how the pipeline works rather than from an inspection of the record. Whether that pipeline's owners regard this as a bug worth fixing or an acceptable error rate is the question I cannot answer and the one that decides whether the review on 24 August means anything.

Whether the platform works as sold. Nothing here tests the product. An ISV considering a 1,788 euro per seat annual commitment needs reference calls with customers matched on size and segment, and this report is not a substitute for one.

Half-life of this assessment

The sourcing question is already resolved, so the section that speculates about mechanism is now a historical record rather than live analysis, and should be read as a scored prediction. What remains live is the review WeTransact promised. If nothing observable follows 24 August, that silence is itself the next data point, and it is a harder one to explain than the original error.

At six months, the vendor figures are stale. Customer counts, marketplace revenue and pricing all move on a quarterly cadence in a company at this stage, and the internal inconsistency I documented may simply be corrected by a copy update, which would resolve the observation without resolving what caused it.

At twelve months, the regulatory reading needs rechecking. The AI Act's machine-readable marking deadline falls on 2 December 2026, guidance on Article 50 continues to develop, and the question of whether commercial messaging gets pulled into scope is open rather than settled. The directive analysis is older and steadier and should hold.

Two things are architectural and will outlast all of it. Generating claims is cheap and verifying them is not, so the incentive to assert rather than ask persists regardless of tooling. And the recipients most worth reaching are the ones best equipped to check, which means the fabricated opener degrades precisely where its user most needs it to work. Neither depends on any model, vendor, or rule described here.

Limitations

I am not independent of this subject in the ordinary sense. The message was sent to me, I was angry about it, and I decided to write before I knew what the research would show. What protects the reader is not a claim of detachment but the disconfirming findings left in: the company is legitimate, its credentials are real, there is no public complaint record against it, and the vendor answered when asked. I have no financial interest in WeTransact or any competitor.

I got the mechanism wrong before the vendor corrected me, and the error was mine to avoid. I searched company registries, Microsoft's documentation, the vendor's site and the open web, concluded no public record existed, and never searched my own posting history. A sales pipeline scraping LinkedIn was the obvious candidate and I did not list it. The scored prediction is shown rather than removed, and readers should discount my confidence in mechanism analysis accordingly.

The evidence base is thin in one direction. I have one message, one explanation, one company's public pages, and platform documentation. I have no view of WeTransact's tooling, no other recipients, and no answer yet on whether the outreach ran on their own product. Two sources are weaker than the rest and labeled as such in the list: a commercial database I could not retrieve, cited only for the existence of a field, and AI sales commentary written by companies with a position on AI sales tools, used only to show a failure mode is recognised.

This report reaches a harder conclusion than one message would normally carry, and the reason is stated rather than smuggled: the error landed on the capability the vendor sells, which is the one place a failure carries information about the product. That inference is labeled as assessment throughout and it is arguable. The buying decision at the end of it is mine, disclosed as mine, and binding on nobody.

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