



OPPORTUNITY-TO-CLOSE PLATFORM

Practical AI Applications for Sales



Artificial Intelligence (AI) is changing the world in fascinating ways. AI is the ability of computers to analyze large volumes of data and automatically learn and improve from experience in order to provide recommendations for better performance and outcomes. In sales it can help ensure that teams have the right insights needed across the end-to-end sales execution and forecasting process so they can improve opportunity close rates and increase forecast accuracy.

According to research firm Gartner, algorithms and process automation are converging in ways that will permanently change how sales organizations engage with prospects and customers. The deployment of AI-related technologies will be a vital part of the future of B2B sales organizations and by 2020, 30% of all B2B companies will employ AI to augment at least one of their primary sales processes¹.

Better sales execution and more predictable sales outcomes depend on getting a handle on the critical opportunity-to-close (OTC) process

that starts with a sales rep working target accounts and qualifying an opportunity into pipeline and ends when the deal gets signed. Today, sales teams are applying AI in practical and far-reaching ways through the Clari platform to sell, forecast and close, predictably.

Clari's Practical AI Use Cases for Sales

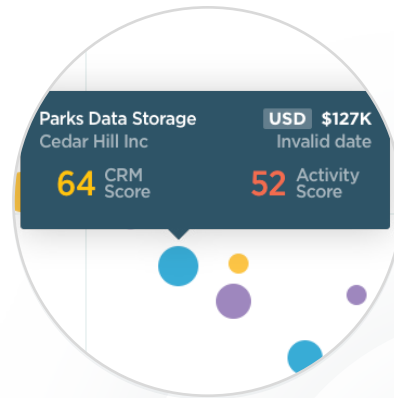
Clari's Opportunity-to-Close platform drives accurate forecasts and shows sales teams where to focus to close more business, faster. By applying AI against a range of important signals from the buying process - not just CRM data but also rep and prospect email activity, meetings taking place, files and contracts flying back and forth - the Clari platform gives the entire sales organization predictive and prescriptive insights through a set of practical AI applications.

¹ Gartner report: "Add AI to Your B2B Sales Organization Now to Improve Revenue", July 2017 by analysts Ilona Hansen, Todd Berkowitz and Tad Travis

AI Applications Designed To Answer Key Sales Execution Questions:

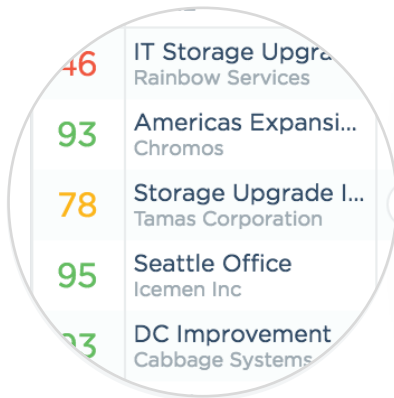
PRESCRIPTIVE DEAL PRIORITIZATION

Is my team spending their time on the right opportunities?



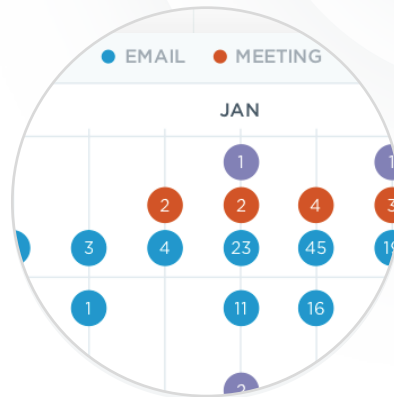
FORECAST PROJECTION

Where are we going to land this quarter?



OPPORTUNITY SCORING

What opportunities are most likely to close or at the highest risk of slipping?



ACTIVITY ANALYTICS

What is the true health of our pipeline?



DEAL INSIGHTS

What deals should I be focused on this week?

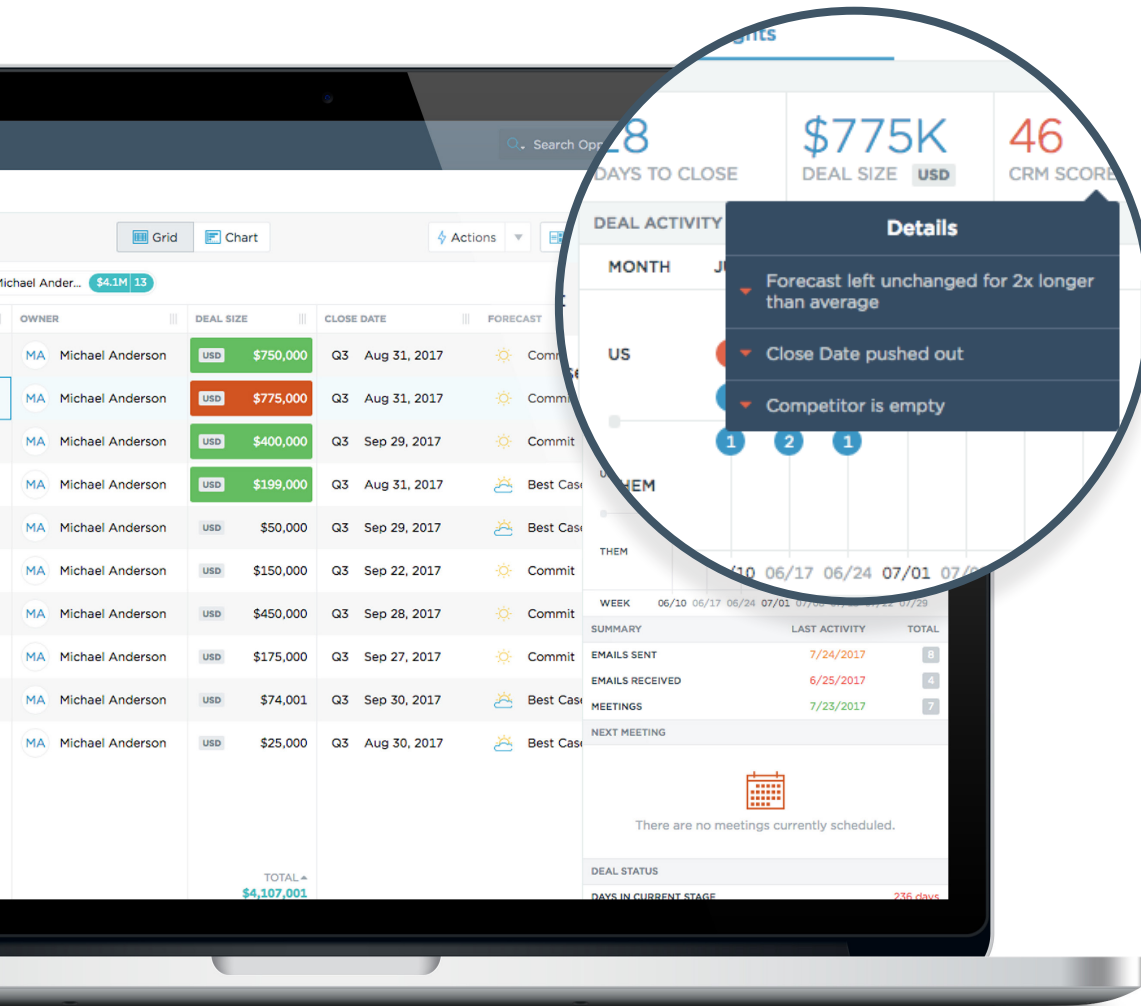


PIPELINE COVERAGE

How much pipeline do I need to generate to hit the number?

Opportunity Scoring

Predicting a deal's likelihood of closing to show which deals are on track and which are at risk.



THE USE CASE

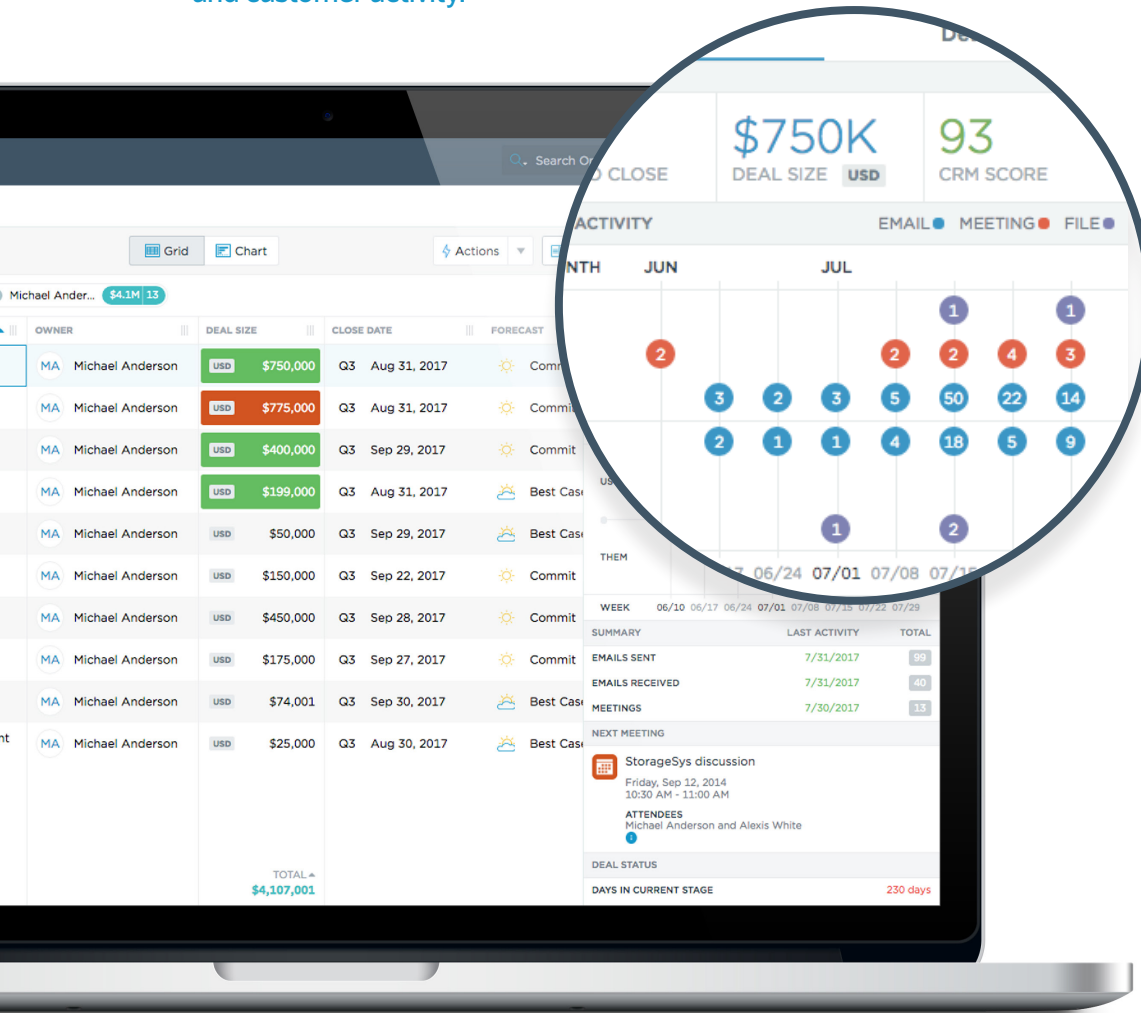
Sales teams can leverage the opportunity score to apply extra scrutiny on current quarter deals to ensure that they are focused on the right ones. They can also identify where there's opportunity to pull deals into the quarter or deals that should be pushed out.

THE SCIENCE

Clari analyzes on a daily basis every won and lost deal over the past two years. Using a hidden Markov model and AI classification algorithms, Clari identifies patterns and factors that drive winning and losing deals across all opportunities for a given organization. Clari then runs all open deals through the algorithm and assigns a simple 1 - 99 score indicating the overall health of the opportunity and the likelihood of a successful outcome. The score and the AI behind it are not a black box. The primary factors contributing to the scores are surfaced to the user in order to build trust and drive action.

Activity Analytics

Providing visibility into deal progress by tracking rep and customer activity.



THE USE CASE

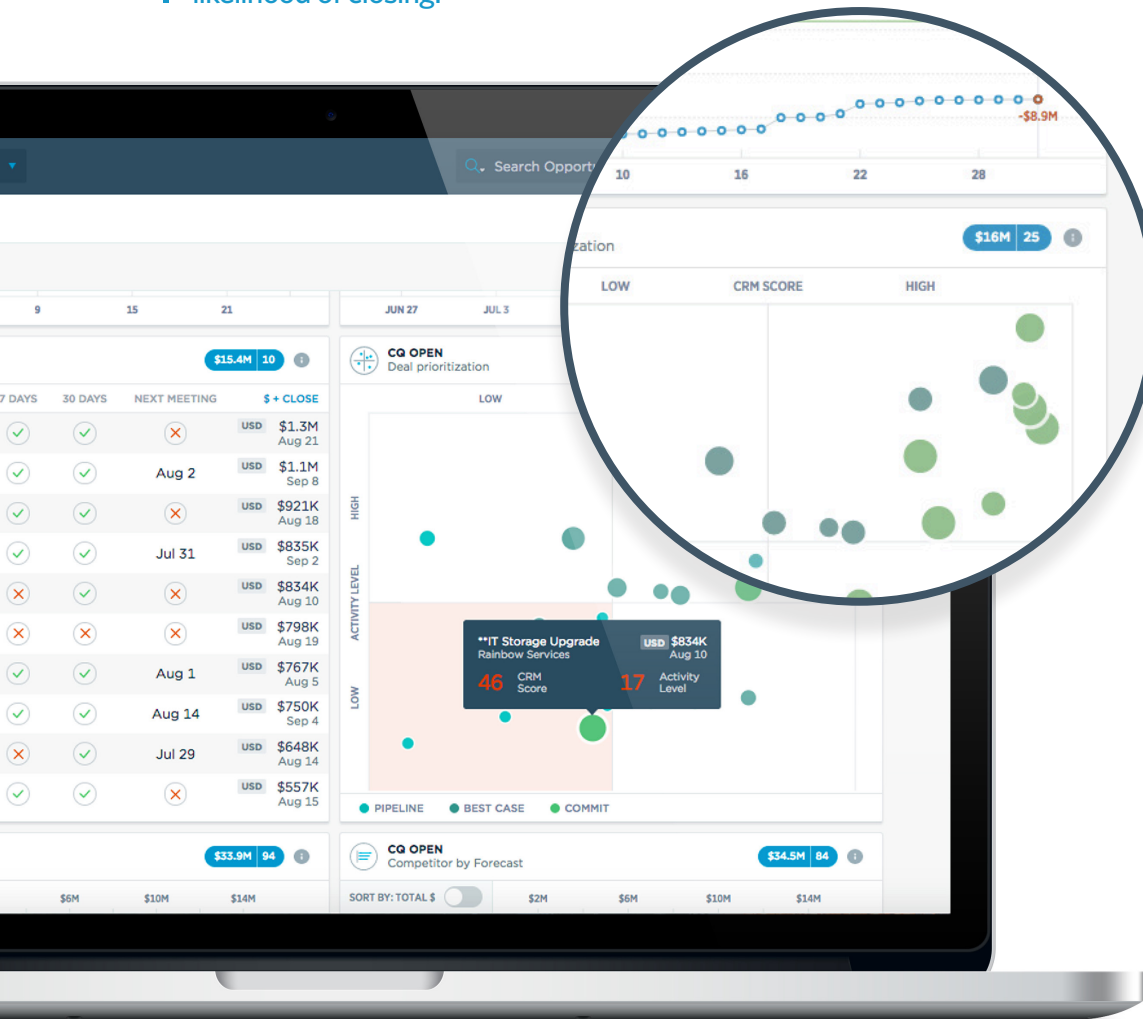
Sales managers can quickly get a handle on how many emails, meetings and documents are flowing back and forth to gauge prospect engagement and the actual health of deals. They can then leverage one on one time with the rep to provide strategic guidance rather than asking for status updates. All of this activity data is captured automatically removing the burden on the reps to manually input activity data into the CRM which in turns improves data quality.

THE SCIENCE

Clari integrates data from a range of systems representing signals from across the buying process such as email, calendar and files. For example, contact information is pulled from the deals account and any associated domain. Using AI, Clari applies a spam filter to parse out irrelevant activity and meetings being set with the prospect as well as emails and files being sent back and forth to ensure it authentically represents the status of the deal.

Prescriptive Deal Prioritization

Comparing rep activity against the true health of the deal and its likelihood of closing.



THE USE CASE

Sales managers can more effectively coach their teams by guiding salespeople to the opportunities that have the highest probability to close, and away from the ones that are going nowhere.

THE SCIENCE

Clari measures the type and volume of activity across all opportunities to create an activity score (see *Activity Analytics for more on activity gathering and filtering*). Activity includes emails sent by the rep, email received from the prospect, files exchanged, and meetings scheduled. Clari's AI places more or less weight on activity based on recency and type of activity. Using this activity score and the opportunity score (see *Opportunity Scoring*), Clari plots deals in a matrix allowing sales managers to quickly identify deals with low activity and high potential (high opportunity score) or high activity and low potential.

Pipeline Coverage

Providing a pipeline target needed to hit quota next quarter.



THE USE CASE

Sales leaders don't have to rely on the multiplier rule of thumb to determine how much pipeline they need to generate to hit their number. They can aim for the amount of pipeline that's actually needed according to Clari's AI engine.

THE SCIENCE

Clari analyzes the won and lost patterns of open deals at the beginning of past quarters. Based on past behavior and pipeline composition, Clari predicts how much each team needs to generate in open pipeline in order to hit quota by the end of the following quarter. Not all deals will be in the pipeline on day 1, so Clari also takes into account the estimated number of new and pulled in deals that will contribute to the quarter after that first day.

Forecast Projection

Providing a point-in-time detailed AI projection of where sales teams will end the month or the quarter.



THE USE CASE

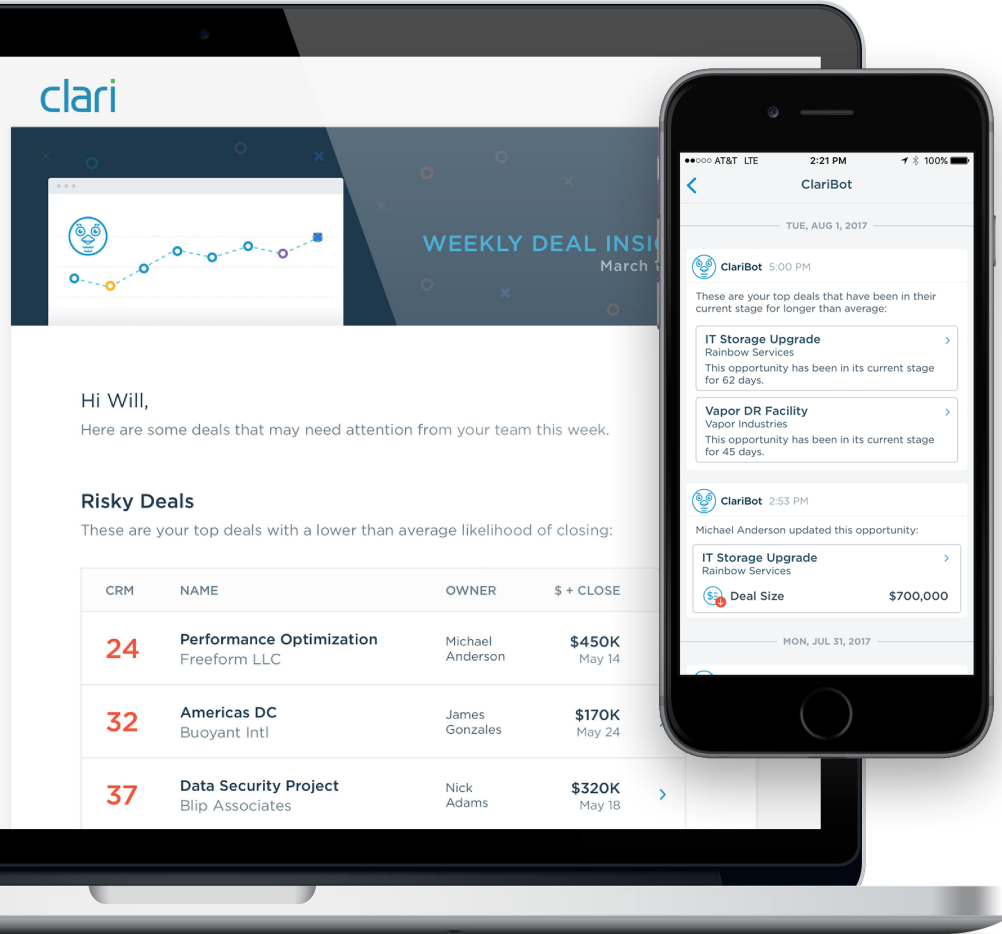
Based on the current state of the pipeline, past performance and the remaining time in the quarter, sales executives can pressure test the numbers rolled up from the team against the AI projection, evaluate the true health of the pipeline and identify any risk that they can mitigate before the end of the quarter.

THE SCIENCE

Clari analyzes the won and lost patterns of open deals at the same time in past quarters. Based on how much has been closed thus far, the remaining pipeline and its composition, Clari predicts how much will actually close with the given amount of time left in the quarter. In addition to analyzing current quarter pipeline, Clari also takes into account the number of new deals that will likely be added in the time remaining in the quarter, as well as opportunities pulled in from a future quarter or month. The combination of deals expected to convert from the current pipeline and deals expected to still come in are rolled up into a single AI-driven forecast.

Deal Insights

Providing updates, insights and prescriptive actions for each individual rep.



THE USE CASE

Increase rep productivity with personalized alerts drawing reps attention and prescribing actions against past-due deal updates, deals with no recent activity, top risky or stagnant deals.

THE SCIENCE

Leveraging the opportunity score (see *Opportunity Scoring*) and activity analytics (see *Activity Analytics*), Clari uses AI to identify outliers or notable deals at risk and surfaces those to users via smart nudges in the Clari Connect messaging application or individual email alerts. Clari can, for example, identify the highest risk Commit deals by territory or deals that have spent too much time in a specific stage.



“Visibility and confidence in deals is critical for our executive and management teams. We were sold on Clari after other customers described their ability to use the Clari deal score to accelerate sales cycles and identify deals that could be pulled in earlier.”

Stephanie Sahr

VP of Global Sales Operations

inmoment

“Clari gives us the ability to take a look at what sales reps are forecasting and measure it against what Clari is projecting and what the leadership team is forecasting for the business. We’re able to bring all that into one view, matched against Salesforce data.”

Rick Haag

Global Director of Sales Operations



“With Clari, Juniper’s sales managers can quickly assess where reps need more guidance and tap into the platform’s predictive analytics to steer them in the right direction. Managers can spot which deals are moving, which are not, and evaluate pipeline strength across the entire sales team.”

Peter Moses

VP of Worldwide Go-To-Market Operations

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For additional information, visit us at Clari.com or call (650) 265-2111