Clari

THE SCIENCE OF WINNING REVENUE



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Introduction

Modern enterprises are drowning in data. Sales, marketing, finance, and customer success generate endless streams of information, yet this mountain of structured and unstructured data breeds confusion. Revenue teams are stuck in a cycle of inefficiency, costing time, profitability, and growth.

The real challenge? **Transforming your revenue team into a high-performance growth engine capable of delivering predictable, scalable success.**

Thankfully, though, we are also entering an equally unprecedented moment in artificial intelligence (AI), both in terms of machine learning (ML) models and large language models (LLMs). The combination of improved data architecture, compute availability, and model performance makes this an exciting moment for those with access to the right data sources.

In the revenue orchestration space, Clari continues to pioneer the way teams understand their business. However, without the right framework to consolidate and analyze data, organizations are left with unanswered questions:

- What is the real status of my book of business?
- Why are certain outcomes occurring?
- What actions should I take next?

Clari achieves this through our CRM Scoring, soon to be renamed Opportunity Scoring, which applies industry-leading data acccess with the latest in ML to give teams immediate insight into the status of the deals in their pipeline.

Clari Opportunity Scoring Use Cases

Clari Opportunity Scoring can be used to get reps and managers to spend time on the right opportunities by:

- Identifying opportunities that are at risk of slipping or not closing by a certain time. This gives the entire team greater visibility into the health of the pipeline and facilitates collaboration between managers and reps on the right opportunities so they can close more business in a predictable way. In addition to identifying at-risk opportunities, Opportunity Scoring also identifies *why* an opportunity is at risk — these are known as factors in the Clari Revenue Orchestration Platform.

- Identifying promising opportunities, including:
    - Opportunities in the current period which seem promising but are not being sufficiently worked
    - Opportunities that are healthy across the board and don't need much scrutiny.
    - Opportunities in a future period which can be pulled in to help reinforce the current period pipeline.

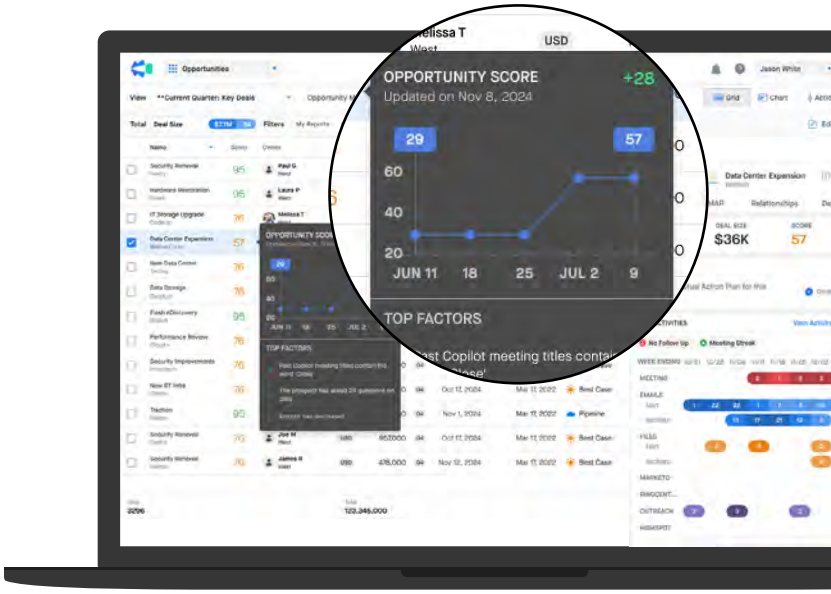
Identifying these opportunities is important to counterbalance at-risk opportunities.

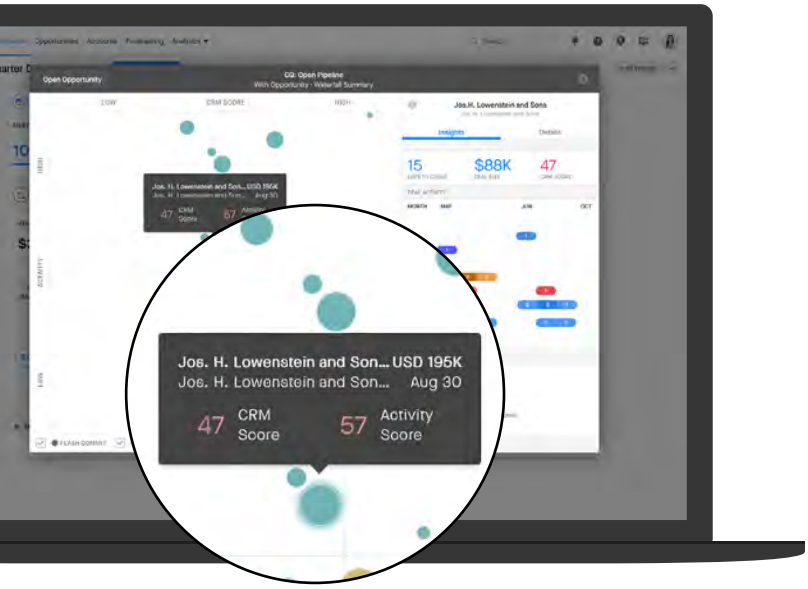
Clari Opportunity Scoring is surfaced through two practical applications, including:

OPPORTUNITY SCORE

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

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.





PRESCRIPTIVE DEAL PRIORITIZATION

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

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 with less chance of success.

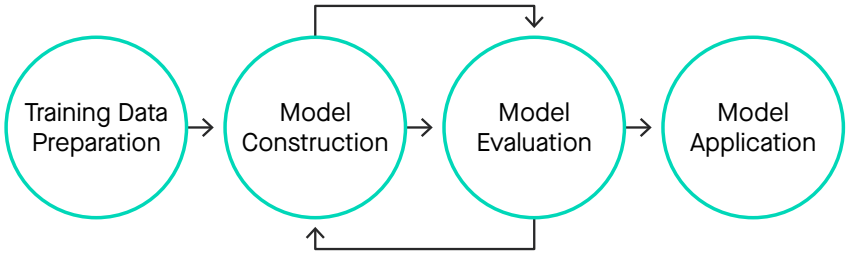
Clari Enhanced Opportunity Scoring Explained

OVERVIEW

Opportunity Scores leverage two years of opportunity history with conversation and meeting data points to build a model that connects how these factors relate to successful deals. It then weighs these elements and scores each opportunity accordingly. The opportunity score is an indication of how likely the opportunity is to close given its history and properties. Won opportunities are given a score of 100 and lost opportunities are given a score of 0. Although the Opportunity score itself is not a projection of probability to close, higher Opportunity scores directly correlate with higher likelihood of winning a deal.

MODEL TRAINING

The process of training the Clari AI model involves a few steps, from data preparation all the way to model application as illustratedto the right:



STEP 1: TRAINING DATA PREPARATION

To train the data, the AI model ingests, analyzes, and weighs the following categories of data: (example features in each category are not inclusive of all datapoints captured by the model)

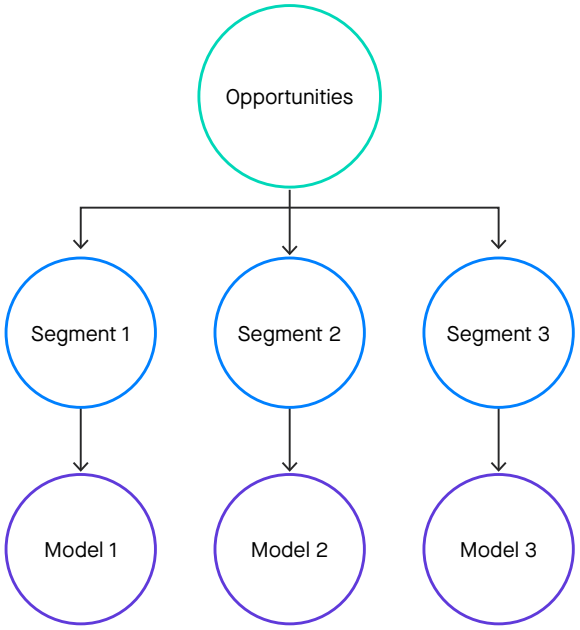
- CRM: Up to two years of historical opportunity data from closed deals (won or lost), and their associated standard and custom fields.
- Conversational Intelligence: Topics discussed, frequency of calls with the prospect, number of questions asked by the prospect, and buyer sentiment (coming soon).
- Meetings: Meeting frequency, time until next meeting.
- Emails (coming soon): Email frequency, prospect sentiment, and topics discussed.
- Ingested Data (coming soon): Customer data tables ingested to RevDB.

STEP 2: MODEL CONSTRUCTION

The probability of an opportunity closing primarily depends on the current state of the opportunity as well as the previous states that the opportunity has been in, along with signals from various other data sources. For example, an opportunity of type "New Logo" being in Stage 5 may be a positive indicator, but the fact that it was previously in Stage 6 and has now been in Stage 5 for a long time might be a negative indicator. If the deal doesn't have a follow-up meeting scheduled–or if customer sentiment in the last meeting was low–then that can be even more of a negative indicator. In that case, all aspects must be considered when scoring opportunities. In order to capture this subtlety, Clari applies three types of modules in conjunction: opportunity segmentation, probabilistic models, and score normalization.

Opportunity Segmentation

Within a single sales organization, it's common for different types of opportunities to follow different sales processes and cycles. For example, a net new opportunity may not follow the same pattern as an upsell opportunity with an existing account. Different teams within the same organization may also follow different sales processes (particularly in large or global sales organizations). For example, enterprises and mid-market opportunities naturally follow different sales patterns. Due to these differences in opportunity lifecycles, Clari separates opportunities into different segments, based on role/territory hierarchy, opportunity type, opportunity size, or other relevant attributes. For each segment, Clari builds a model as described to the right. Rather than having one single model per organization, Clari constructs a library of models, and applies those to different opportunities accordingly.



Clari trains each model according to its unique business segment, and each opportunity is scored based on that model. These segments are defined manually by Clari based on how sales processes commonly operate for different opportunity types.

Probabilistic Model

Once the segments are identified, an ML model is trained on historical data from each type. This model learns the relationship between signals and deal outcome based on this history. For example, deals in Stage 5 may historically have a 90% chance to be closed won, but this may be reduced to 70% if there have been no meetings with the prospect for 30 days.

Score Normalization

Score normalization ensures consistency across different sales segments by adjusting scores to account for varying patterns and cycles in sales processes, thereby providing a uniform metric to evaluate all opportunities effectively.

STEP 3: MODEL EVALUATION

To validate predictions without waiting for outcomes, Clari looks back at opportunities from the previous month. By focusing on deals that were active then but have since closed, it allows a comparison between what was predicted and what actually transpired.

We look at a variety of industry-standard evaluation metrics (e.g. F1 Score, AUC,) in order to verify against this recent data that the model can accurately predict which deals will close successfully. Checking against this data with a known outcome allows Clari to confidently deploy accurate models and investigate cases where models are not performing as expected.

STEP 4: MODEL SELECTION AND TUNING

Each model goes through a tuning phase where Clari seeks to find the best possible model for a given business, and tune it based on historical data.

In order to find the best model settings for each business, we tune to these key settings:

- Which customer data to group together
- Which employee level to look at (VP, Manager, etc.)
- Which type of AI model works best (Markov chain, Random Forest, etc.)
- Specific settings for each model type:
    - Markov chain: How to handle rare events
    - Hidden Markov Models: Number of patterns to look for
    - Tree models: How big and detailed to make each decision tree

To find the best combination of parameters, we test hundreds of different settings using cross-validation. We repeat the process above of looking at recently closed deals to evaluate performance, and choose the model parameters that give us the highest accuracy. This process is fully automated and does not require human intervention.

STEP 5: MODEL APPLICATION TO OPEN OPPORTUNITIES

Once we've trained our models on historical data, we can quickly score any open opportunity. For each new deal, we:

- Identify the history of all data types
- Place it in the right segment group based on its characteristics
- Run it through that segment group's probability model
- Convert the result to a normalized score

This scoring is recalculated every 30 minutes, giving users timely insights about their deals.

Score Explanations

To improve understanding and make scores more actionable, Clari surfaces the primary contributing factors so that teams can understand what is moving the needle and drive follow-on actions. These are shown by hovering over the Opportunity score, in a pop-up that shows the score's history, along with the corresponding Top Factors.



Our model identifies what helps and hurts each deal's chances of closing. The importance of each factor comes from the probability calculations, which adapt to how a specific sales team operates.

An organization's top factors will vary, deal by deal and day by day, as history develops and the current state of data changes. For example, two CRM fields may contribute positively to the score, but the most recent meeting duration may be unusually low and show up as a detractor. Sentiment in the most recent conversation can be high, but the deal's extended age might indicate higher risk of it slipping out of quarter.

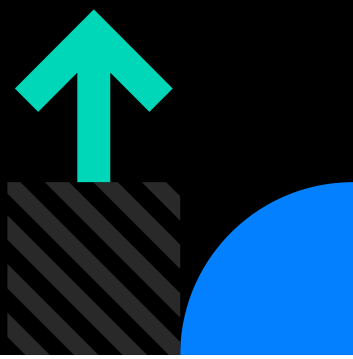
Ultimately, the explanations provided above are to help remove the mystery around why a score has moved. This is to ensure awareness and improve trust in the model by giving you the tools to assess your deal in a grounded, realistic way and take action to improve the score.

Conclusion

Finding meaningful signals in your data is no longer optional -- it's imperative for any business that wants to stay competitive. Clari Opportunity Scoring leverages predictive analytics to transform complex data patterns into actionable insights, with the ultimate goal of complementing a seller's intuition by providing a data-driven second opinion. Rather than spending hours analyzing data points and second-guessing decisions, sellers can quickly reference a single, reliable score. While the seller remains firmly in control of driving deals forward, the Opportunity score serves as a powerful tool to validate instincts and highlight potential blind spots. With the variety of conversational, communications, and CRM data points available to the Clari Revenue Orchestration Platform, sellers gain unprecedented visibility into the status of each deal.

READY TO SEE HOW CLARI CAN TRANSFORM YOUR REVENUE STRATEGY?

Take a tour today



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