Clari

REVENUE PLATFORM
Buyer's guide

IN THE BUYER'S GUIDE

01

THE REVTECH LANDSCAPE

In this chapter, you'll learn about:

The recent burst of RevTech mayhem

Today's top-down imperative: "We need to consolidate"

How RevTech, when done right, can unlock 24% higher win rates and an 80% boost in rep productivity

REVTECH MAYHEM

We're living in the age of RevTech.

In the last few years alone, thousands of revenue technology companies have hit the market. New solutions. New messaging.

Their pitch: Say goodbye to the patchwork system of spreadsheets, BI tools, and CRM software. Say hello to a revenue-focused approach.

Business leaders recognized the opportunity to maximize team performance and drive revenue results. So they adopted dozens of point solutions.

The results?

They've been mixed (at best).

Companies have realized more tech is not always the answer. Today, they're focused on a tight set of integrated solutions to run revenue.

"A big part of our evaluation was looking for

AN ALL-IN-ONE PLATFORM

that can give us predictive forecasting and account insights. It's been huge for us from a revenue operations standpoint."

Colin Tanner

Revenue Operations Manager at League

THE CALL FOR CONSOLIDATION

There's a top-down mandate for consolidation.

Leaders want to reduce tech spend and the headache of managing multiple vendors. They want to control costs, while protecting their ability to drive revenue.

But they're not the only players with a stake in this game.

There's also a bottoms-up desire. Front-line team members want to get their work done efficiently. Swivel-chairing between point solutions is a waste of time and energy.

The feeling is universal.

Everyone wants a one-stop solution to promote collaboration between revenue-critical employees, and governance of revenue-critical processes.

WHAT DOES WINNING REVTECH LOOK LIKE?

A winning Revenue Platform delivers RevCG (Revenue Collaboration & Governance).

- **Collaboration.** This is how you run revenue. Over half of your company's employees are revenue-critical. As such, they're most effective when they can collaborate from a shared source of truth, instead of relying on point solutions that create silos and data breakdowns.
- **Governance.** This is how you control revenue. Revenue is not just an outcome—it's your company's most important business process. It needs to be standardized and controlled. Governance is critical for predictability, efficiency, and growth.

And the data speaks for itself:

Companies that implement and execute RevCG see

24%
HIGHER WIN RATES

80%
INCREASE IN REP PRODUCTIVITY

14.9%
LESS REVENUE LEAK

"Clari has helped us combine sales, customer success, and marketing into one cohesive Revenue Operations function. When we think about the full revenue life cycle across sales, marketing, and customer success, we're all collaborating in and measured off of the same unified metrics within Clari.

CLARI IS OUR SINGLE SOURCE OF TRUTH.

All our 1:1s, the manager meetings, the executive teams, the cross collaboration of business units, all those meetings are driven through Clari's dashboards, analytics and insight."

Jonathan Bald

Growth Leader at Black Kite

Top-down and bottom-up, there's a desire for RevTech consolidation. The winning Revenue Platform facilitates collaboration across teams and allows for governance of the end-to-end revenue process, in an easy-to-use, single source solution.

Ready to learn more?

02

INTRODUCTION TO REVENUE PLATFORMS

In this chapter, you'll learn about:

What a Revenue Platform is (and how it works)

The #1 reason companies invest in a Revenue Platform

How you can use this guide to identify business needs and find the perfect Revenue Platform for your company

OK, SO WHAT'S A REVENUE PLATFORM?

Simply put, a Revenue Platform provides a single solution to run all internal and external workflows, for all revenue-critical employees (from reps to execs).

It's your revenue hub.

The right platform ensures your revenue teams are collaborating at a high level, and your revenue process is effectively governed.

To accomplish this, RevTech features internal workflows:

- Forecasting
- Automated data capture
- Revenue intelligence & analytics

And external workflows:

- Sales engagement
- Conversation intelligence
- Mutual action plans

It also unifies revenue-critical data from front-end revenue applications, and also from CRM, conversation data, email & calendar clients, and external data warehouses (ie, Snowflake, BigQuery, Postgres).

14.9%

THE AVERAGE AMOUNT OF REVENUE COMPANIES LOSE EACH YEAR TO REVENUE LEAK.

THE #1 REASON COMPANIES INVEST IN REVTECH

Most CEOs have a tough time answering an essential question: Are we going to meet, beat, or miss on Revenue?

It's an age-old problem.

Companies rely on decades-old tech, like spreadsheets, CRM, general business intelligence tools. Or they've got point solutions that only address a sliver of the revenue process. Teams try to stitch together ill-fitting sources of information.

The result?

Revenue leak. And a lot of it.

According to [Boston Consulting Group], revenue leak destroys $2 trillion in economic value every year. At the company level, [Clari Labs] found the average company leaks 14.9% of their revenue every year.

At its best, a Revenue Platform helps companies identify and stop all areas of revenue leak. This leads to pinpoint precision–a dream for markets and modern revenue teams alike.

CONSOLIDATING ALL REVENUE-CRITICAL TECH

FOR ALL REVENUE-CRITICAL EMPLOYEES

SDR | **REP** | **FLM** | **REVENUE LEADER** | **REVOPS** | **MARKETING** | **POST SALES**

Sales Engagement	Conversational Intelligence	Deal Management	Revenue Forecasting	Mutual Action Plans	Data Capture & Ingestion

REVDB—THE MOST COMPREHENSIVE REVENUE DATABASE

Snapshotted CRM Data | Activity Data | Conversation Data | External Data (custom)

HOW TO USE REVENUE PLATFORM: A BUYER'S GUIDE

In the upcoming pages, we'll cover everything you need to know about Revenue Platforms. Keep reading for info on:

- How to assess and scope your business needs.
- Key workflows to take a look at.
- How a comprehensive Revenue Database unlocks powerful, trustworthy AI.
- The ROI you should expect.
- How to implement and customize your Revenue Platform.
- Top criteria for choosing a Revenue Platform.

Additionally, you'll find customer evidence, case studies, and links to additional resources if you want to go deeper.

Revenue leak is a value destroyer. It's siphoning away 14.9% of your quarterly revenue. By stopping revenue leak, your companies can achieve pinpoint revenue precision and reap the rewards from public and private markets.

Want to explore further?

03

SCOPING YOUR BUSINESS NEEDS

In this chapter, you'll learn about:

- Steps to assess your specific business needs
- Show-stopping obstacles to watch out for
- The keys to a compelling RevTech business case

"RevCG is about getting everyone inside the GTM org to dance to the beat of the same drum by allowing complete visibility and in-depth collaboration.

COMPLETE VISIBILITY AND IN-DEPTH COLLABORATION."

Holly Procter
CRO at Incredible Health

STEP-BY-STEP: HOW TO ASSESS BUSINESS NEEDS

The goal of your business needs assessment is to better understand the end-to-end flow of your revenue processes. What's working? And where are there opportunities?

Here's a helpful playbook.

STEP 1

Start with an audit of your revenue process against two axes:

1. How well are our revenue-critical employees collaborating?
2. How well governed are our various revenue workflows

STEP 2

Next, narrow your scope by focusing on three critical elements of the revenue process:

1. How well do we create pipeline?
2. How well is that pipeline converting through our sales stages?
3. How reliably do we close pipeline to create revenue?

This should be done for both your new customer acquisition process as well as your customer retention & expansion process.

STEP 3

Engage every level of seniority. Solicit input from your front line reps all the way up to the executives in the corner office. This will give you a deep understanding of your team, your data, your goals, and your processes.

STEP 4

From there, you'll be able to create a prioritized list of which teams and/or processes need investment (and in which order). This information will direct your evaluation of a Revenue Platform–ensuring that it addresses your near and long-term needs.

WATCH OUT FOR THESE SHOW-STOPPING OBSTACLES

Full transparency:

Business needs assessment takes effort. It takes buy-in up and down the hierarchy. And it takes a true commitment to intellectual honesty, as well as a lack of preciousness about existing processes.

Be ready to overcome these obstacles.

PUSH BACK.

As you inspect the revenue process, be sure to articulate "what's in it for me" for all stakeholders. Make it clear: The goal is not to add complexity. The right Revenue Platform should do the opposite. It should streamline processes, maximize productivity, and drive revenue results.

ADOPTION.

Implementing RevTech is only the start. Behavioral change management is often where tech implementations fall flat. Make sure any Revenue Platform you bring on is adaptable enough to meet you where you are today and take you where you need to go tomorrow.

DATA READINESS.

Data often lives in silos. This makes it challenging to pull together, and can slow down your speed to revenue. Without a comprehensive system, your data quality will suffer.

BUILDING THE REVENUE PLATFORM BUSINESS CASE

What's the ROI on a Revenue Platform?

At the end of the day, meaningful business impact is what you're after. And the right Revenue Platform can solve revenue leak across multiple time horizons.

SHORT-TERM

Grab quick wins by identifying low-hanging fruit. Common errors, overlooked lead types, and under performing campaigns,

REDUCING DEAL SLIPPAGE BY 10.3%

(Clari Labs)

MIDDLE-TERM

Improve customer retention with the use of data backed insights. Spot opportunities to cross-sell or upsell, reaching an average of

10% INCREMENTAL OPPORTUNITIES WON

(The Total Economic Impact of Clari, a commissioned study by Forrester Consulting)

LONG-TERM

Use historical data to support business investment. Scale your fine-tuned operations, and reduce time spent on forecasting and related activities

BY UP TO 90%

(The Total Economic Impact of Clari, a commissioned study by Forrester Consulting)

To tee yourself up for success, make sure your chosen platform will future-proof your revenue process. You should have high confidence that you're getting both a breadth and depth of capabilities to support all revenue-critical employees.

And most importantly, your RevTech business case should provide a clear path for how you'll improve collaboration and governance at your company.

HIGH COLLABORATION, HIGH GOVERNANCE

[RevCG]

Team: By leaning on shared processes and a drive toward shared outcomes, you motivate each member to take the right action, in the right way, at the right time.

Goals: You create revenue-oriented targets and GTM strategy team-wide.

Data: You value a single source of truth and aim for automated, real-time updates for overlapping teams.

Processes: All adopted processes are documented for maximum efficiency and optimization.

HIGH COLLABORATION, LOW GOVERNANCE

[Prioritization]

Team: Team members are clear on the "why" but not on the "how."

Goals: You lack a common anchor point to bring teams together around revenue.

Data: Without a shared dataset to manage against, you're unable to focus on the highest-impact actions. ("Without data, you're just another person with an opinion.")

Processes: Your deal and pipeline review cadences are irregular (and unregulated)—so it's hard to assess what's working and what's not working to improve processes over time.

LOW COLLABORATION, HIGH GOVERNANCE

[Evolution]

Team: While key players are clear on tasks, they're unclear on shared responsibility or action items.

Goals: All targets are process-oriented instead of outcome-oriented.

Data: Although you record important information, it's siloed and hard to access.

Processes: Your procedures are highly documented, but leave little room for adjustments and flexibility.

LOW COLLABORATION, LOW GOVERNANCE

[Foundation]

Team: Conflicting mandates result in misalignment and lack of collaboration.

Goals: "Busy work" outcomes don't provide a clear tie to revenue or retention.

Data: Access to information is manual, siloed, and slow.

Processes: Your systems are ad hoc and undocumented, resulting in inefficiencies.

Business needs assessment is the starting point for any RevTech review. Outline areas of opportunity and how a Revenue Platform can help you improve collaboration and governance at your company.

Ready to talk through your business needs?

04

KEY FUNCTIONALITY YOU SHOULD EXPECT

In this chapter, you'll learn about:

- The core features and functionality of a Revenue Platform
- What a Sales Engagement solution is
- What a Revenue Operations & Forecasting solution is
- What a Conversation Intelligence solution is
- What a Mutual Action Plan solution is

"The thing that got me most excited when I truly understood the capabilities that Clari is bringing to the table is that

IT'S A COMPLETE PLATFORM

can combine three technology solutions into one single platform, which makes it simple for adoption because there's one place, one single source of truth."

Christopher Vik
SVP, Sales at Leapwork

LET'S TALK CORE FEATURES AND FUNCTIONALITY

Your Revenue Platform should provide a deep bench of capabilities to power all revenue-critical employees.

That means integration. Access. Connection.

Front-end applications:
For starters, your team is starving for the right tech stack. Therefore, your Revenue Platform should feature a buffet of front-end applications. These tools work together to feed your revenue process.

This looks like:

- Data automation
- Team performance
- Workflow management
- Forecasting
- Pipeline visibility
- Coaching

Every element of the Revenue Platform should lead to greater efficiency and productivity for your team. And the experience should be natural. Seamless.

This is the key to getting full adoption.

Back-end control:
Behind the scenes, admins need autonomy. Including, a single backend to control user roles and permissions. But don't stop there. Equip (and empower) them to architect advanced capabilities such as forecasting and sales plays.

Data:
Keep in mind: The Revenue Platform should be harvesting and aggregating any data created by its use. This data informs the insights engine as well as the machine learning and AI capabilities (we'll talk more about this in Chapters 7 and 8).

HOW ABOUT SALES ENGAGEMENT?

Often thought of as a "system of execution," Sales Engagement solutions are critical for front-line sellers. They help support account planning, prospecting, deal management, and customer relationships.

Your Revenue Platform should feature them.

Sales Engagement solutions include:

- Multi-channel prospecting campaigns (email, dialer, social media)
- Intuitive inbox experience, like one-off email templates
- Full funnel analytics

They should also complement your CRM, inheriting the right role and permissions hierarchies, honoring data privacy policies, and not causing API surges that can compromise other CRM integrations.

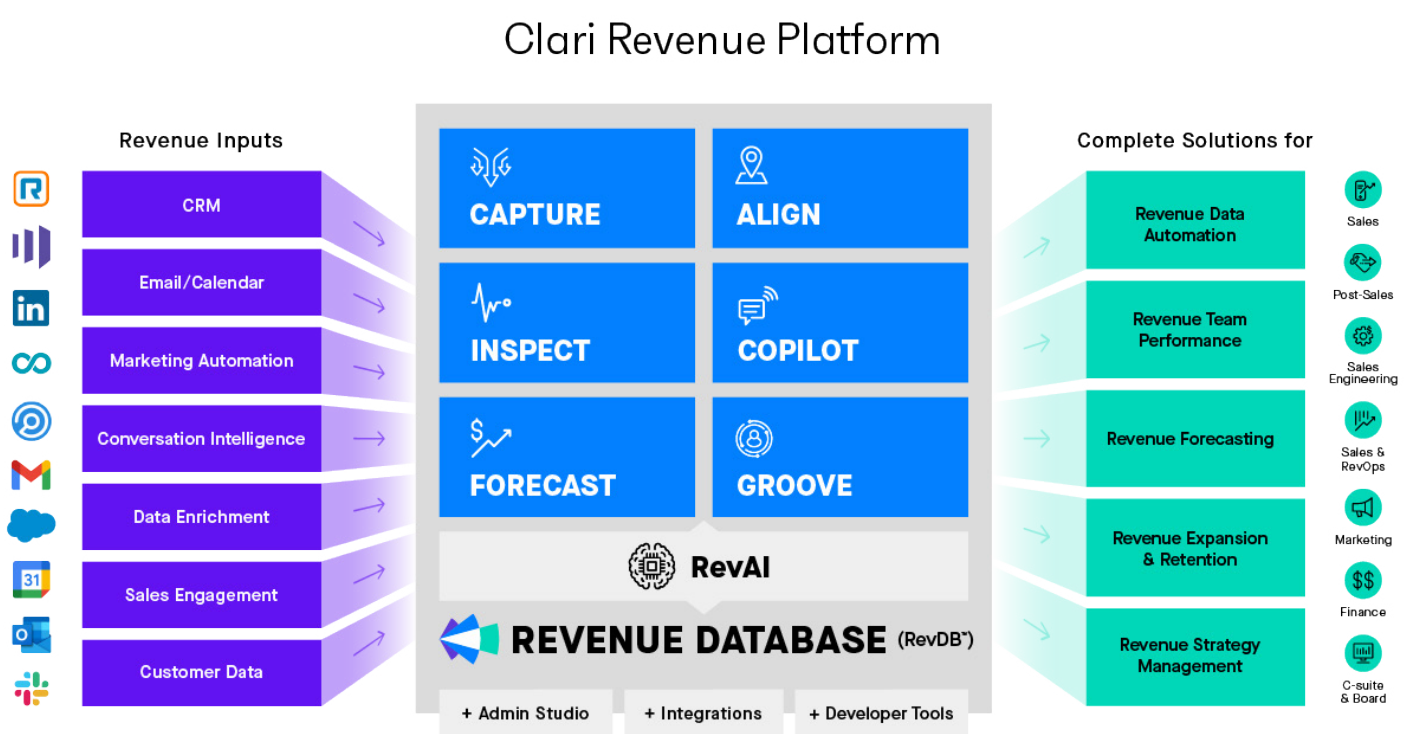
REVENUE OPERATIONS & FORECASTING

At most companies, this workflow is run using some combination of spreadsheets, business intelligence tools, and CRM. The process is as ineffective as it is inefficient, because those solutions were not purpose-built to run revenue.

A Revenue Platform, meanwhile, offers:

- A shared source of truth for revenue analytics and intelligence
- Out-of-the-box analytics around revenue trend and funnel analysis
- An easy way to submit deal judgment, manage deal stages and information, and roll-up a forecast call
- AI-driven forecast predictions

These analytics and processes should support the new business sales motion as well as the post-sales retention and expansion motions.



CONVERSATION INTELLIGENCE

Often thought of as a “call recording” solution, conversation intelligence (CI) solutions record virtual calls between your sales team and external parties (with their permission).

CI solutions:

- Offer real-time coaching to reps during calls, surfacing talking points when preset topics or keywords are mentioned on calls
- Provide call scorecards for managers who can review full calls or snippets and give feedback to their teams
- Accelerate the onboarding of new reps onto the team
- Reinforce the roll out of GTM strategies like new products and new messaging

Taken together, these features enable lightning fast coaching and team member development. Look for CI in your Revenue Platform.

MUTUAL ACTION PLANS

Internal collaboration is important. So is collaboration with buyers and customers. This is where Mutual Action Plans (MAPs) come in.

MAPs help standardize and govern your sales process, giving buyers the blueprint for what needs to happen when across each deal. They also ensure that buyers are aware of key milestones and action items they are accountable for.

This leads to proper qualification, transparency between buyers and sellers, and ultimately improves forecast accuracy and win rates.

Top Revenue Platforms have MAPs built in.

When you have complete revenue data, each element of the Revenue Platform should complement every other element, providing a seamless user experience, greater efficiency and productivity, and maximizing pipeline and revenue generation.

Want to learn more about Revenue Platform functionality?

05

CORE WORKFLOWS AND FUNCTIONAL USE CASES

In this chapter, you'll learn about:

- The Top 5 workflows for Revenue leaders
- The Top 5 workflows for Revenue Operations leaders
- The Top 5 workflows for sellers

It’s all about workflows. Tangible actions your team takes throughout the day. These workflows, when added up, represent your full capacity to win every revenue moment and drive the bottom line.

As you consider a Revenue Platform, look at it through the lens of high-value workflows across your organization.

THE TOP 5 WORKFLOWS FOR REVENUE LEADERS

Revenue leaders define the strategic vision and objectives that drive overall revenue generation. Then, they translate company strategy into actionable goals for their teams.

To accomplish this, they focus on:

1

REVENUE FORECASTING

Every leader needs to understand their path to plan-for new business, retention, and expansion. A full forecasting workflow drives a cadence that combines human judgment, AI predictions, and historical performance to achieve predictable, repeatable revenue precision.

2

DEAL INSPECTIONS

Which deals make or break the quarter? Which deals have competitive pressure? What’s the overall health of a team’s committed deals? All of these questions (and more) should be answered by painless deal inspections inside a Revenue Platform.

3

WIN/LOSS ANALYSIS

Leaders must always understand why they’re winning and why they’re not. Is competitive pressure heating up? Are product gaps causing revenue leak? Are we winning in a geo, segment, or industry where we should double down?

4

REPLICATING TOP PERFORMERS

Leaders always know who their top reps are. They need to dive deep into their process to understand why. These insights create the blueprint for future training and enablement so your pack of top performers is always expanding.

5

CONVERSION RATE TRENDS

Win rates are critical to know, but they’re also a lagging indicator to other funnel conversion rates. Leaders must know how revenue is advancing through sales stages to see where the pipeline is stuck or leaking, and put the right solutions in place.

“Clari provides tremendous value in understanding the state of my forecast and pipeline to **PRIORITIZE ACTIONS THAT IMPROVE THE QUALITY, QUANTITY, AND TIME** spent across our team.”

Ted Purcell
CRO at Tealium

THE TOP 5 WORKFLOWS FOR REVENUE OPERATIONS LEADERS

Revenue operations leaders oversee the systems, tools, and processes that enable efficient and effective revenue generation. They bridge the gap between strategy and execution by optimizing operations, analyzing data, and implementing best practices.

To accomplish this, they focus on:

1 PIPELINE TRENDS & OUT-QUARTER COVERAGE

Too many teams fall into the trap of only thinking about the current quarter. Operations leaders should keep a close eye on pipeline trends and coverage against future quarter revenue targets.

2 QBRS & BOD MEETINGS

These meetings have a reputation for being time-consuming and ineffective. Operations should provide purpose-built dashboards and analytics that significantly reduce prep time and make the live meeting time strategic and valuable.

3 PIPELINE MOVEMENT ANALYSIS

Operations should own a “waterfall” view of the pipeline to understand how deals are advancing, stalling, or pushing. This real-time view helps catch potential leaks as they develop, and implement processes or plays that plug the gaps.

SALES PROCESS GOVERNANCE (QUALIFICATION & STAGES)

4. Standardization is critical for scale. Operations must ensure that their team's qualification and stage processes are effectively implemented and adhered to. Knowing that every deal across the business is getting run the same way is key to achieving revenue precision.

OPERATING RHYTHM

5. Operations should drive the company's Revenue Cadence. This ensures the right revenue moments are happening every day, week, and month of the quarter.

"Clari has become one of the most important tools in our revenue process by **DELIVERING ACTIONABLE INSIGHTS, ALIGNING KEY STAKEHOLDERS,** and delivering a first class user experience."

Fermin Peleteiro Cameo
SVP, Field Operations at Workday

THE TOP 5 WORKFLOWS FOR SELLERS

Sellers are the frontline warriors who build relationships with prospects and customers. They identify potential leads, nurture relationships, present solutions, and close deals.

To accomplish this, they focus on:

REP & MANAGER 1:1.

1. Too often, these meetings feel like interrogations. When run well, they are strategic conversations that help drive deals forward and develop seller skills. A strong Revenue Platform helps ensure full visibility so reps don't have to "report the news" and can instead focus on strategy.

2 FILLING THE FUNNEL

You can't close a door that's not open. Opening new opportunities needs to be an always-on exercise for sellers. They need to be equipped with prospecting capabilities that meet them in the flow of work, making execution a painless exercise.

3 DEAL MANAGEMENT & EXECUTION

Sellers must always be aware of how the buying group is engaged, and what next steps and milestones they should be driving toward. This helps a seller manage themselves and their buyers against the mutual action plan they agreed upon.

4 MONITORING ACCOUNT HEALTH

Sellers need a real-time view of account health–product and license usage, customer sentiment, and any red flags that arise.

5 HONING YOUR CRAFT

The best reps are always looking for skills to learn and ways to improve. By studying call recordings (their own and their team's) they can learn and emulate successful tactics and continuously improve.

Executing these workflows requires constant collaboration between teams and governance from leadership. Consistency and communication are key to fully realize a RevCG strategy. (See the RevCG Matrix in Chapter 3)

Know your revenue workflows inside and out. This will equip you with key information and insight when considering the Revenue Platforms on the market.

Want to learn more about workflows?

06

WHY YOU NEED A COMPREHENSIVE REVENUE DATABASE

In this chapter, you'll learn about:

- The massive revenue data problem
- Which data sources need to be pulled, cleaned, and formatted
- The importance of snapshotting CRM
- How to assess the depth of a revenue database

THE MASSIVE REVENUE DATA PROBLEM

To understand today's data challenges, we have to roll back the clock.

In the 1990s, the first "sales databases" emerged. These data storage solutions accompanied early CRM systems. But they were never built for revenue.

Instead, over the years, revenue-critical departments (Marketing, Customer Success, Finance, etc.) each created their own database to address individual needs.

This led to fragmented data. Siloed communication. And the problem has only gotten worse with the proliferation of sales tools, apps, and point solutions.

Today, revenue data is an absolute mess.

And yet, buried in all that muddy data are revenue insights. Signals your team can use to operationalize and scale. If you can get to them.

That's why it's so important to consolidate data sources into a centralized revenue database.

A database purpose-built for revenue teams.

BY 2026, 65%

of B2B sales organizations will transition from intuition-based to data-driven decision making, using technology that unites workflow, data and analytics.

Unlock RevTech's Potential Through Data Maturity
13 March 2023
By Sandhya Mahadevan

CONSIDER THESE DATA SOURCES

As you plan to populate your revenue database, take a look at all the available data sources within your company.

Here are common places to look:

CRM DATA

ACTIVITY DATA

CONVERSATION DATA

EXCEL DATA

CUSTOMER DATA PLATFORM

CUSTOM DATASETS

PARTNER DATA AND APPS

WHAT TO DO WITH YOUR DATA

Pulling data is step one.

But if your goal is to create pinpoint forecasts and pull actionable insights, you need to go further.

First, data needs to be cleaned. Standard Ingest APIs are well known for occurring a lot of data quality issues, which can throw noise into your dataset.

Second, data needs to be formatted (denormalized). This will ensure your data is ready to be ingested by your visualization layer (see Chapter 7 on built-in analytics) as well as by your AI engine (see Chapter 8).

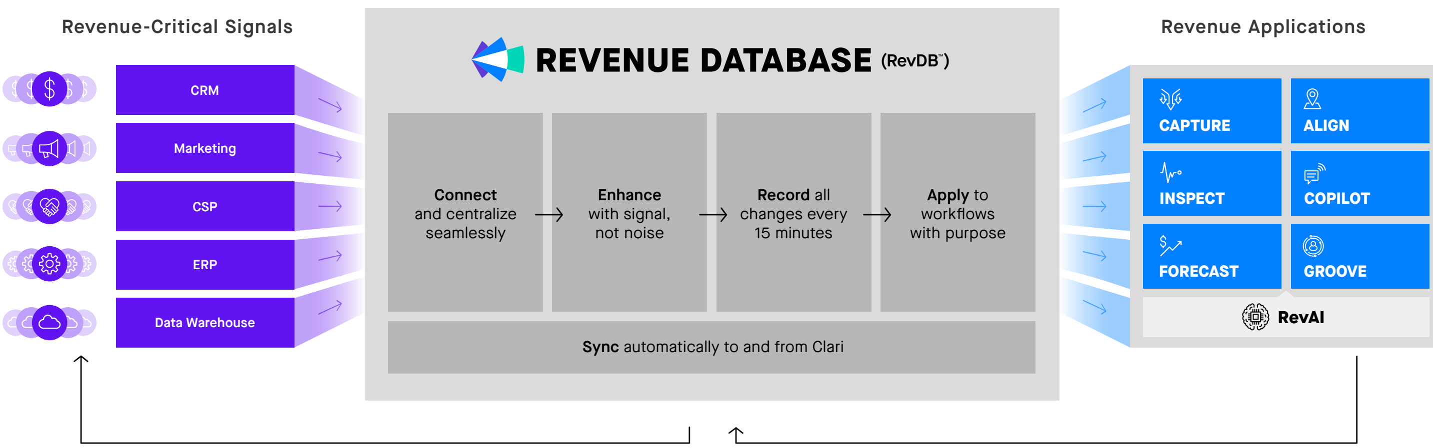
Lastly, historical data needs to be snapshotted. To find meaningful historical patterns in your revenue data, it's critical to compare data and information across time.

HOW TO ASSESS A REVENUE DATABASE

As you research Revenue Platform options, take note of the database features. Here are some helpful questions to ask:

- How much historical data does your revenue platform capture and store?
- How often is your CRM snapshotted?
- What CRM objects and fields are being snapshotted?
- How will conversation data be integrated into the database?
- What internal and external workflows will be powered by your revenue data?
- What are examples of use cases?

The RevDB Difference



Your revenue platform runs on data. Make sure the database that's powering it is purpose-built for revenue teams. Ask critical questions about data capture, readiness, snapshotting, and completeness.

Want to explore further?

07

FROM DATA-DRIVEN INSIGHTS TO ACTION

In this chapter, you'll learn about:

- The expected data analytics capabilities of a revenue platform
- The expected action framework
- The insights and actions it offers to help run revenue

LET'S SEE SOME DATA ANALYTICS CAPABILITIES

Revenue teams need answers, not endless rows of data.

That's why top revenue platforms feature serious data analytics capabilities. They take your data (generated within the platform and from connected sources) and crunch the numbers, answering questions like:

- What are my conversion rates, stage by stage?
- What stage am I losing the most deals?
- What is my pipeline coverage?
- What does my pipeline look like over time?
- What is my forecast projection, forecast changes, and projection accuracy?
- How is next quarter shaping up?

Insights are accurate, timely, and lightning-fast.

As you scope potential revenue platforms, dig into the analytics capabilities. What's running the data insights engine? How is info compiled into preconfigured dashboards that just work?

"Clari has played an integral role in improving our revenue execution process.

THE RICH DATA CAPTURED HELPS OUR DIRECT SALES TEAM CALL THEIR NUMBER WITH MORE CONFIDENCE AND ACCURACY."

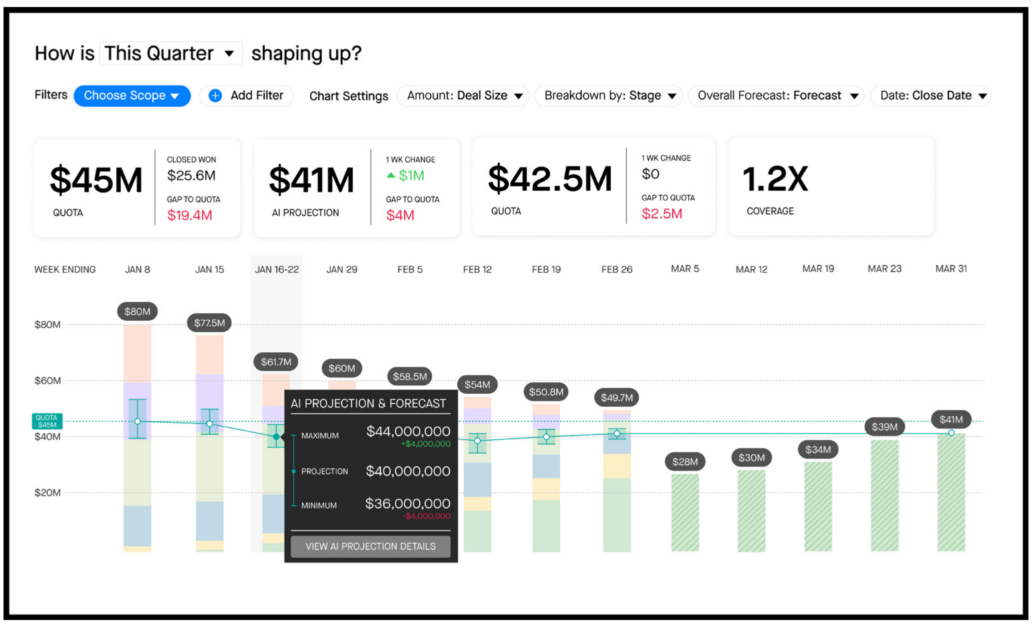
Kelly Steckelberg
CFO at Zoom

TURNING INSIGHTS INTO ACTIONS

Insights are valuable.

But if your team can't turn them into tangible actions, you'll never move the bottom line. That's why top revenue platforms take the next step:

- Update deals
- Forecast calls
- Build MAPs to assign tasks to buyers
- Change talk track battlecards for more effective messaging
- Schedule emails to match revenue cadence
- Use AI functionality for writing compelling LinkedIn InMail messages
- Create recurring tasks for repeatable workflows



Insights and actions. The two key pieces your revenue team needs to move forward. Make sure your revenue platform features next-level data analysis and a dynamic action framework.

Want to explore further?

08

LET'S TALK ABOUT AI

In this chapter, you'll learn about:

- The AI Opportunity
- What AI can do for Revenue: top use cases & pitfalls
- The 3 types of AI: descriptive, predictive and generative

THE AI OPPORTUNITY

Welcome to the Age of AI.

Today, every company on the planet is looking at their AI opportunity. How to weave AI throughout the business to drive productivity, decision-making, and growth.

For revenue teams, the AI opportunity is huge.

Despite advances in technology, the average rep still spends 66% of their time on non-selling tasks. Crafting emails. Navigating platforms.

What if we could augment and automate?

"Hands down the best sales platform I've ever used

THE AI PROJECTIONS ARE EERILY ACCURATE.

We know how the quarter will finish, within weeks of when it starts, and take action to produce the best outcomes."

Michael Wing
President at VAST Data

TOP USE CASES FOR REVENUE

The list of AI applications in the revenue space could fill an entire book.

Let's look at some low-hanging fruit:

- Provide data and analysis for revenue forecasting
- Predict the likelihood of an opportunity to close, to move through stages
- Predict the likelihood of a lead converting to an opportunity
- Predict the likelihood of an account to engage
- Summarize past calls, emails
- Generate sales content tailored to a certain persona, use case, or vertical
- Aggregate product feature requests based on customer conversations
- Offer competitor or buyer sentiment analysis

Where else do you see AI fitting into your revenue organization?

FUNDAMENTAL PITFALLS OF AI

Important caveat: AI isn't an instant fix.

For starters, AI is only as good as the data you feed it and the workflows it powers. When these are off, AI results suffer (and revenue leak continues).

GOOD DATA
GOOD MODELS
GOOD USER EXPERIENCE

Today, many software providers spend too much time focusing on the back-end. And many teams are limiting their focus to Generative AI.

We need a more expansive approach.

THE 3 TYPES OF AI

To weave AI into your revenue strategy, you first need to know the available tools. Here are 3 AI types revenue teams should be considering:

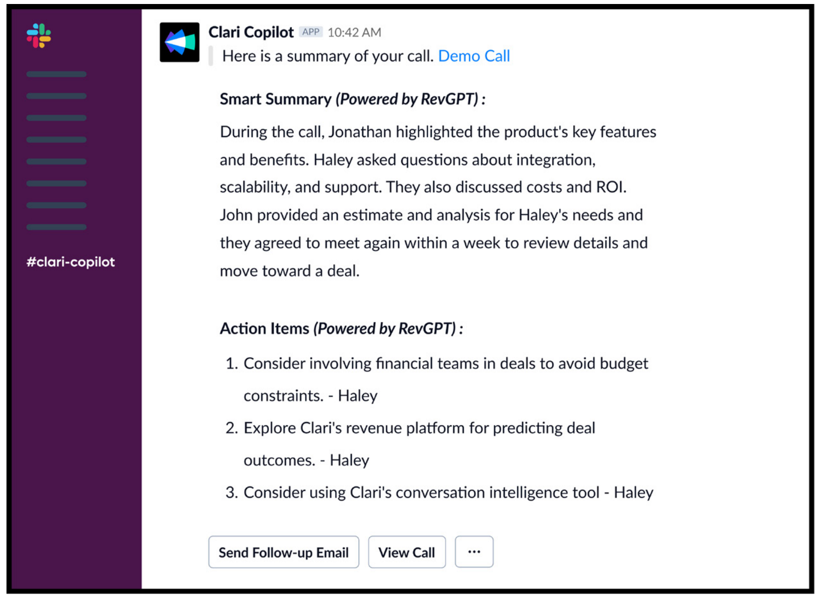
DESCRIPTIVE

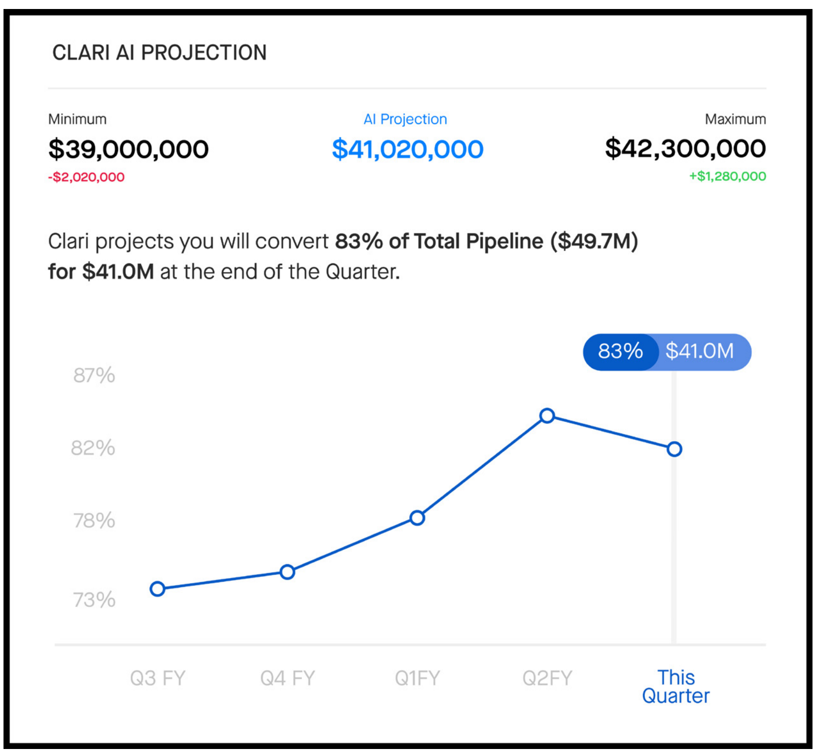
NLP & Unstructured Data

Natural Language Processing (NLP) operates mostly on unstructured data, diving deep into human interactions and communications.

One of its primary applications is analyzing conversations, answering questions like, “What was discussed?”

Descriptive AI offers detailed insights from seemingly chaotic and unorganized information.





PREDICTIVE

Structured Data & Outcomes

Focusing primarily on structured data, predictive analytics looks to forecast future events and outcomes.

An important question it addresses is, “Where will we land?”

A common use case is forecasting, where businesses anticipate sales, customer trends, or inventory needs based on historical and current data.

GENERATIVE

Unstructured Data & Content Creation

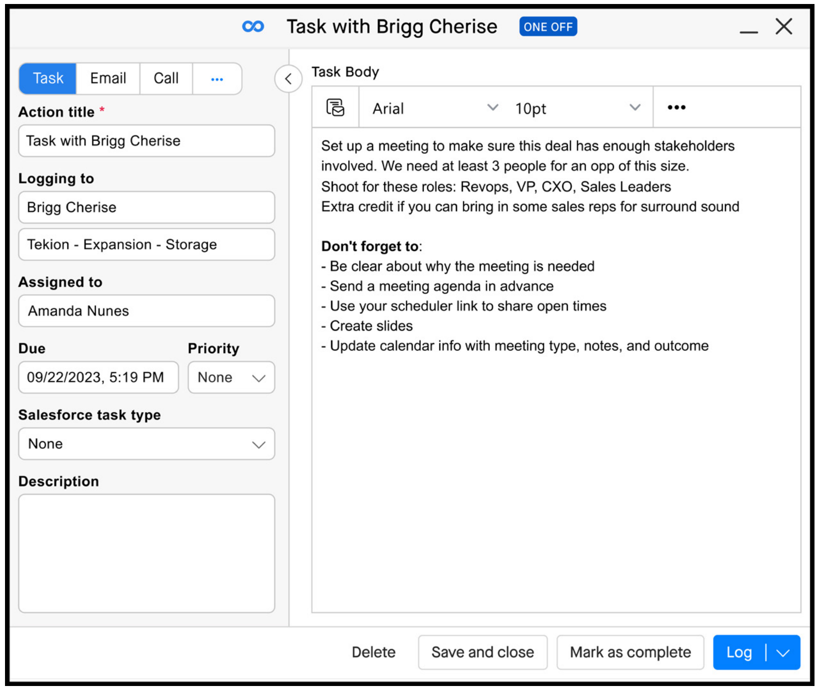
Generative models, leaning heavily on unstructured data, are designed to produce or summarize content.

They tackle questions such as, “What were the main points?”

This capability is valuable for condensing lengthy documents or producing new content based on existing information patterns.

The bottom line: A Revenue Platform should deliver across all the vectors of AI.

And from call data to forecast data to data insights, each type of AI provides visibility across the entire revenue process. So anyone can see what’s coming, what’s not, and how to plan for it.



AI represents a game-changing opportunity for revenue teams. But it’s not as simple as flipping a switch. Good data, good models, and good UX are key to a winning AI strategy. Make sure your revenue platform takes full advantage of all 3 types of AI.

Ready to see an AI-Powered Revenue Platform in action?

09

REVOPS IN A BOX

In this chapter, you'll learn about:

- Key pains of Revenue Ops Leaders
- The major benefits of a Revenue Platform for Revenue Ops
- Putting things in practice: The Revenue Cadence

Where does your revenue process need a boost?

This question is the North Star for modern RevOps teams. And power-packed technology offers them the insights and action points they need to drive optimization.

Let's look at how a Revenue Platform impacts RevOps partners.

REVOPS LEADERS ARE IN PAIN

Today's RevOps teams are lean and targeted.

They need to make a big impact with limited hours in the day. That's why visibility into the business and access to the right data is so important.

Sadly, most RevOps leaders lack this visibility.

Without the right suite of tools, they're left relying on conversations and exploration when they should be relying on cold, hard trendlines.

RevTech solves this pain point by offering:

VISIBILITY INTO PIPELINE, DEALS, AND REPS

SELF-SERVICE INSIGHTS

AUTOMATED WORKFLOWS

CONNECTIVITY

KEY BENEFITS FOR REVOPS LEADERS

The dream for RevOps teams?

To gain stronger control of the entire revenue operation. This provides instant access to the state of the business, along with the ability to hold stakeholders accountable to key efficiency targets and business outcomes.

The right Revenue Platform delivers this (and more).

From a productivity standpoint, it offers RevOps teams the ability to:

- Automate manual, time consuming tasks (so they can focus on the company's strategic initiatives).
- Consolidate the tech stack and increase adoption across the organization with an easy to use platform that meets the seller's where they work.

And from a value-add perspective, it helps RevOps:

- Forecast across teams, products, geos, and business segments.
- Inspect any aspect of the GTM motion.
- Inform business planning with predictive analytics and insights.

"It was nearly impossible to understand pipeline movement in Salesforce.

CLARI RESOLVED THAT ISSUE,

and we're able to understand all changes across any period of time."

Carter Eiler

Sr. Director, Head of Sales Operations at Science 37

REVOPS IN PRACTICE: THE REVENUE CADENCE

Without visibility into our business and access to the right data, I can't be as efficient and strategic with supporting company strategy, identifying areas for growth, and sharing with executives and teams where we really stand with revenue:

- Visibility into pipeline, deals, and reps for strategic reporting and team alignment
- Time spent on pulling data and cross-functional alignment across various revenue teams
- Providing self-service insights
- Complex business model leading to complex forecasting processes
- Holding stakeholders accountable for data and forecasts
- Data clean-up and hygiene projects are taking away from more strategic projects
- Implementing the right tools and processes and automating work
- Connectivity and adoption of tools across the organization, especially across a global org

Others:
Gain greater control of your entire revenue operation by connecting and automating your go-to-market teams, data, and processes, so you always know what the state of the business looks like and can answer any question that comes up, right away. Influence company strategy by partnering with and holding your stakeholders accountable to drive more efficient and predictable business outcomes.

VALUE WE DELIVER:

- Forecast across teams, products, geos, and business segments
- Automated updates to CRM
- Inspect any aspect of the GTM motion
- Business planning informed by predictive analytics and insights

Answers the question:

ARE YOU GOING TO MEET, BEAT OR MISS ON REVENUE?

The answer to the most important question in business lies in what we call a Revenue Cadence: the ongoing motion of revenue moments that revenue teams leverage across quarters to deliver predictable, repeatable revenue precision.

RevOps is a critical function within modern revenue organizations. With the visibility and productivity gains of a high-powered Revenue Platform, your RevOps teams can drive greater efficiency and targeted business outcomes.

Want to learn more about Revenue cadence?

10

CUSTOMIZATION, INTEGRATION, SECURITY AND COMPLIANCE

In this chapter, you'll learn about:

- Why you need a customized platform *(not a one-size-fits-all solution)*
- How to spot a platform that will integrate with your existing toolset
- How to size up security measures to protect your sensitive revenue data
- What to look for when it comes to industry regulations and data protection standards

YOUR PLATFORM, PERSONALIZED

Every business has unique needs

- Target outcomes and business metrics
- Existing tools and infrastructure
- Established processes

You need a revenue platform that fits seamlessly into your business.
Not a one-size-fits-all solution.

As you scout Revenue Platforms, ask:

HOW CAN THIS PLATFORM BE CUSTOMIZED TO MEET OUR BUSINESS'S NEEDS?

- Does the platform integrate with existing systems? (video conference, CRM, email and calendar, lead gen, and other business apps)
- Can the platform grow and adapt as your business evolves?
- Does the vendor offer comprehensive training for your team? What kind of customer support is available post-purchase?
- Does the platform feature a user-friendly UX?

ONE-STOP-SHOP

Just like your revenue team needs to work together, so do your tools.

To create a truly "seamless" workflow, your Revenue Platform needs to play nicely in the toolbox. Meaning, it needs to integrate with the other software in your tech stack to help your team run their revenue.

Look for a platform that integrates with tools you're already using so you don't add unnecessary work to your team's plate.

“What we love about Clari is the flexible framework that allows us to **BUILD STANDARDIZATION AND GOVERNANCE** into our global revenue process.”

Matt Cox
VP, Global Revenue Ops at Certinia

CONTROL YOUR REVENUE

“Governance is an act of trust between the leaders creating strategy and the teams executing it on the frontline with their customers,” as defined by Ben Chen of Growth Strategy at Clari.

With a governance process in place, not only does your team have a shared source of truth, but leadership has complete visibility, end to end.

Achieve this by creating a governance process:

- Develop a governance model
- Outline clear roles and expectations
- Accurately measure performance

Governance aligns expectations and sets uniform standards. It provides access to revenue-critical data. And it empowers revenue teams to think and act strategically.

PROTECT SENSITIVE REVENUE DATA

The quickest way to destroy your company's brand:

EXPOSE SENSITIVE INFORMATION.

That's why it's paramount to pick a vendor with a proven commitment to trust and transparency.

Step 1: Start by asking for industry proof of security and privacy.
Step 2: Evaluate privacy and governance.

Privacy protection laws vary based on location. It's critical to have a platform that provides customizable consent features to account for changes in global privacy laws.

To ensure the platform offers this functionality, look for robust audit features to ensure access matches organizational standards.

Additionally, make sure the platform supplies data import and export features to fit seamlessly into your existing tech stack.

Today's ideal platform operates on a public cloud, designed for optimal availability, fault resistance, and data integrity.

REMAIN COMPLIANT

Industry regulations and data protection standards. Violate these, and your revenue platform will turn into a legal nightmare overnight.

Look for:

- An ongoing cycle of monitoring, auditing, and refining security controls.
- Regular evaluations by accredited third-party assessors and the vendor's internal risk and compliance team.

Lastly, transparency is key. Audit results should be shared openly with customers and senior leadership, along with a clear process for addressing and fixing any issues.

Unique business needs. Global security and compliance requirements. The right revenue platform offers both customization and top-line protections.

Want to explore further?

11

ROI AND COST-BENEFIT ANALYSIS

In this chapter, you'll learn about:

How to assess the potential return on investment

How to track the cost of status quo/no decision

Why you need a revenue platform now

START WITH THE POTENTIAL ROI

Bringing on a revenue platform is an investment.

As such, you need to outline the return on investment to the organization.

When it comes to a unified revenue platform, there are three key impacts that add to the bottom line:

1 CONSOLIDATION

The right revenue platform pulls multiple point solutions into a single system of engagement. This saves tech costs, while also freeing up seller time. The average ROI on consolidation alone is 448% for top RevTech.

2 OPTIMIZATION

Equipped with next-level tools, your revenue team can get more done in less time. Say goodbye to outdated, manual reporting. And hello to an 80% bump in seller productivity and a 90% bump in RevOps productivity.

3 CONVERSION

Improved tools and AI-powered insights drive sales. With top RevTech in place, you can increase win rates by 11% and decrease slipped deals by 10%. You can also forecast with 12x better accuracy.

90%

INCREASE IN REVENUE OPERATIONS TEAM PRODUCTIVITY.

A commissioned study conducted by Forrester Consulting on behalf of Clari

START WITH THE POTENTIAL ROI

How much money are you leaving on the table every quarter?

Probably more than you think. A recent study by Boston Consulting Group found that

REVENUE LEAK ACCOUNTS FOR MORE THAN $2 TRILLION IN LOSS EVERY SINGLE YEAR.

And, if you recall from Chapter 2, this translates to

14.9% IN AVERAGE COMPANY REVENUE LEAK.

Revenue leaks because:

- Buyer expectations are higher than ever.
- Revenue processes are broken.
- Outdated technology isn't keeping up.

By standing still, you're leaving revenue potential on the table. And you're falling behind competitors who are investing in cutting-edge revenue practices.

"Before going public, our board advised that we had a few years of accurate, predictable revenue results.

WE BROUGHT ON CLARI TO INSTRUMENT THAT PROCESS

and have since successfully gone public with repeatable revenue execution cadences."

Eric Yuan

CEO at Zoom

WHY TODAY?

Your revenue problems aren't going anywhere.

Every day you operate with subpar tools and processes:

- Your reps waste valuable time
- Your leaders lack line-of-sight
- Your company leaks revenue

DOLLAR BY DOLLAR.

PLUG THE LEAKS.
CONSOLIDATE YOUR STACK.
DRIVE EFFICIENCY,
AND (MOST IMPORTANTLY)
INCREASE YOUR WIN RATES.

START TODAY.

A cutting-edge revenue platform can help you stop the 14.9% leak in revenue impacting your business every year. It also unlocks serious business returns, like an 80% bump in seller productivity and 12x better forecasting.

Want to build your business case?

12

IMPLEMENTATION PROCESS

In this chapter, you'll learn about:

- The critical stages involved in implementing the platform
- The best way to think through implementation over time
- The level of support you should expect from your RevTech vendor

Flip the “on” switch and your platform’s ready to go, right?

Not quite.

Problem is, you can identify the best Revenue Platform in the world. But without a strong implementation plan, you’ll never see the full ROI (and drive meaningful revenue growth).

Let’s look at how to set your new platform up for success.

OUTLINE IMPLEMENTATION UPFRONT

The implementation process needs to be part of discussion from Day 1.

- How you’re going to roll out the platform across revenue-facing teams.
- Which obstacles you’re likely to face in the implementation phase.
- What level of training and support you’ll receive from the vendor.

At Clari, we divide implementation into three distinct stages:

1 PRODUCTIVITY

The first phase is getting sales reps up-and-running quickly. This delivers a quick productivity and revenue boost, giving your team some positive data to highlight. We focus on streamlining opportunity management and automating note taking and coaching.

2 EFFICIENCY

With early productivity wins in hand, it’s time to shift to efficiency gains. Here, it’s all about making leaders more efficient in building a deal-based forecast. RevTech should make it easier for them to pressure test deals, spot risk, and analyze their pipeline.

3 COLLABORATION & GOVERNANCE

Lastly, it’s time to tackle the root causes of Revenue Leak and create a high degree of Revenue Precision. This includes systems around revenue collaboration (for internal teams and customers), as well as a detailed process for establishing quarterly forecasting.

"Getting Clari Copilot up and running was fast and smooth.

EASILY THE BEST TECHNOLOGY IMPLEMENTATION I'VE EVER SEEN."

Ben Pressley
CRO at fabric

ADOPT A CRAWL, WALK, RUN APPROACH

Today's RevTech is feature-rich.

Realistically, it's going to take time for your team to max out the capabilities of the tool. Keep this in mind as you take your first steps.

Time to Value

Quarterly business cycles are a reality of the modern business world. And, as you bring on a Revenue Platform, you'll want to see early results.

Make sure your time to value is realistic.

Returning to your ROI formulation (Chapter 10), outline the benefits you anticipate seeing in the first quarter or two post-integration. Then, look further down the road to establish the long-term impact of your new Revenue Platform.

CRAWL, WALK, RUN

At Clari, we recommend a phased approach.

Look closely at the implementation stages listed above, and you'll see they increase in complexity and feature usage over time.

This approach helps to:

- Keep expectations realistic
- Build in room for change management efforts
- Challenge the team toward long-term success

Rome wasn't built in a day.

Don't expect your revenue process to be.

"We use Clari to have more intelligent forecast conversations, especially when we look further out. By looking at historical trends, we can extrapolate where we'll be going forward.

WE DON'T HAVE A CRYSTAL BALL, BUT WE HAVE CLARI."

Jules Gsell

VP of Sales at Databricks

WHAT KIND OF SUPPORT ARE WE TALKING HERE?

The right RevTech partner will be fully invested in your success.

And they'll offer serious support from your first day until your last. Make sure you map the support structures in place to help launch your new platform.

Implementation will make or break your ROI. Walk in with an established plan that features: (1) critical stages of adoption, (2) a crawl, walk, run mindset, and (3) a clear map of available support from the RevTech vendor.

Want to explore further?

13

CHOOSING THE RIGHT REVENUE PLATFORM

In this chapter, you'll learn about:

- Comparative Side-By-Side Analysis: Compare the Clari platform with competitors

- Guidance on how to make an informed decision when selecting a revenue platform

Here's how Clari stacks up as a Revenue Platform

CLARI DELIVERS THE BEST ALL-IN-ONE PLATFORM, OUTCOMES, AND VALUE

BETTER ALL-IN-ONE	Clari	Legacy Platforms
Sales engagement	✓	✓
Deal and pipeline inspection	✓	✓
Revenue forecasting	✓	✓
Conversation intelligence	✓	✓
Buyer and seller alignment	✓	x
Data capture	✓	✓
Dialer	✓	✓
Scheduler	✓	✓

BETTER RESULTS		Clari	Legacy Platforms
Experience	**Rollout & maintenance:** Top notch self-serve, CS, & PS options	✓	✓
	Adoption: Stickier than Candy Crush	✓	✓
	Growth: Pricing, packages, and solutions that scale	✓	x
Data	**Accurate:** Up-to-date, matches CRM	✓	✓
	Complete: Captures and tracks all signals throughout funnel	✓	x
	Usable: Drill into and analyze any data	✓	✓
Flexibility	**All levels:** Tailored experience from BDR to boardroom	✓	x
	All revenue teams: Top of funnel to post-sales	✓	✓
	All business models: Opp based, consumption, etc.	✓	x

BETTER VALUE		Clari	Legacy Platforms
Cost	**Licenses:** Price per user per year	$$	$$$
	Platform: Annual platform fee	-	$$$
	Implementation: Internal resources or external PS/agency help	$$	$$
	Maintenance: Ongoing support, admin, and change management	$	$$$
Results	**Win rates:** Average improvement in percentage deals won	↑ 15%	↑ 13%
	Efficiency: Average boost in rep productivity	↑ 80%	Not public
	Forecast accuracy: Average across all customers	95%	81%

READY TO SIZE UP YOUR NEXT REVENUE PLATFORM?

Ready to size up your next Revenue Platform?

Use this checklist to make sure you're dotting all your I's and crossing all your T's.

PREPARATION

Assess your business needs.

- [ ] Audit your current revenue process across collaboration and governance
- [ ] Consider the three critical elements of the revenue process:
    - [ ] How well do we create pipeline?
    - [ ] How well is that pipeline converting through our sales stages?
    - [ ] How reliably do we close pipeline to create revenue?
- [ ] Grab input from every level of the organization.
- [ ] Create a prioritized list of critical needs across your revenue org.

Prepare for common pitfalls.

- [ ] Establish a "what's in it for me" to persuade key stakeholders.
- [ ] Bring on an adaptable platform to overcome adoption challenges.
- [ ] Be prepared to pull together disparate data sources.

Map out your functionality expectations.

- [ ] What front-end applications are needed to drive revenue growth?
- [ ] What do you want from a back-end, administrative standpoint?
- [ ] How do you expect your new platform to generate and store data?

What additional features do you need across:

- [ ] Sales engagement
- [ ] RevOps and forecasting
- [ ] Conversation intelligence
- [ ] Mutual action plans

Review common workflows for Revenue Leaders, RevOps, and Sellers.

Revenue Leaders:

- [ ] Forecasting
- [ ] Deal inspections
- [ ] Win/loss analysis
- [ ] Replicating top performers
- [ ] Conversion rate trends

RevOps Leaders:

- [ ] Pipeline trends & out-quarter coverage
- [ ] QBRs and BOD meetings
- [ ] Pipeline movement analysis
- [ ] Sales process governance (qualification & stages)
- [ ] Operating rhythm

Sellers:

- [ ] Rep & manager 1:1
- [ ] Filling the funnel
- [ ] Deal management & execution
- [ ] Monitoring account health
- [ ] Honing your craft

QUESTION & ANSWER

Size up database capabilities.

- [ ] How much historical data does your revenue platform capture and store?
- [ ] How often is your CRM snapshotted?
- [ ] What CRM objects and fields are being snapshotted?
- [ ] How will conversation data be integrated into the database?
- [ ] What internal and external workflows will be powered by your revenue data?
- [ ] What are examples of use cases?

Talk through insights and actions.

Insights

- [ ] What's running the data insights engine?
- [ ] How is info compiled into preconfigured dashboards that just work?

Actions

- [ ] Sales engagement
- [ ] RevOps and forecasting

Ask about AI.

Consider top use cases:

- [ ] Provide data and analysis for revenue forecasting
- [ ] Predict the likelihood of an opportunity to close, to move through stages
- [ ] Predict the likelihood of a lead converting to an opportunity
- [ ] Predict the likelihood of an account to engage
- [ ] Summarize past calls, emails

- [ ] Generate sales content tailored to a certain persona, use case, or vertical
- [ ] Aggregate product feature requests based on customer conversations
- [ ] Offer competitor or buyer sentiment analysis

Find out how the vendor is integrating the 3 types of AI:

- [ ] Descriptive
- [ ] Predictive
- [ ] Generative

Scope the RevOps capabilities.

Find out how the Revenue Platform helps RevOps:

- [ ] Forecast across teams, products, geos, and business segments.
- [ ] Inspect any aspect of the GTM motion.
- [ ] Inform business planning with predictive analytics and insights.

Confirm customization, security, and compliance.

Customization:

- [ ] How does the Revenue Platform adapt to your needs?
- [ ] What integrations are available across key systems?

Security:

- [ ] Request industry proof of security and privacy.
- [ ] Walk through their privacy and governance process.
- [ ] Ensure encryption and public cloud usage.

Compliance:

- [ ] Look for an ongoing cycle of monitoring, auditing, and refining security controls.
- [ ] Make sure there are regular evaluations by accredited third-party assessors and the vendor's internal risk and compliance team.

BUILDING THE BUSINESS CASE

Lay out the Return on Investment.

Consider ROI across 3 key categories:

- Consolidation
- Optimization
- Conversion

Consider the cost of the status quo:

- $2 trillion in annual loss.
- 14.9% annual revenue leak.

Build an implementation plan.

Ensure focus across the 3 stages of implementation:

- Productivity
- Efficiency
- Collaboration & Governance

- Adopt a crawl, walk, run approach.

EXPLORE (SOME OF THE) CLARI REVENUE PLATFORM

See Clari in Action