Clari

Putting Revenue Intelligence to Work

Insights that drive your revenue operations and propel your GTM strategy

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Introduction

The squeaky wheel gets the grease. Too often, that's how revenue teams run their business. The most vocal client, the mammoth deal, the big campaign or event, gets all the attention. You step back from oiling the wheel only to discover that a quiet one went off the rails—along with your go-to-market (GTM) strategy.

There are a lot of wheels in motion that propel your GTM strategy forward. Knowing what opportunities are stalled, which territories need additional resources, or which rep doesn't have enough pipeline coverage against quota helps revenue leaders identify risk and opportunity and avoid surprises.

Visibility alone isn't enough.

If you want your revenue process to run like a well oiled, predictable machine, understanding what's happening in your business is only the first step. Equally critical is the ability to integrate those insights into your cadences to propel GTM execution and ensure every leader and team member knows how to take action to hit revenue targets.

In this ebook, we share how best-in-class GTM teams leverage Revenue Intelligence and execution insights as part of their overall Revenue Operations strategy to drive exceptional rigor and produce predictable revenue outcomes.

Revenue Intelligence: How You're Tracking to Plan—and What to Do About it

It's nice to look at the number of closed deals and renewed customers at the end of the quarter. But if you don't know how your team got there, how can you repeat your success?

What if the end result didn't align with the revenue goals and predictions you set at the beginning of the quarter?

To shift from being reactive to proactively taking control of your revenue process, you need to know what's going on in your business, your team, your territories, and your deals on a quarterly, monthly, weekly, and daily basis. You need to measure performance against operational metrics in one-on-ones, pipeline calls, account reviews, and other cadences so you can take action when it matters.

Revenue Intelligence gives you the insights you need to guide your team's execution.

Revenue Intelligence tells everyone in your organization what they need to know in order to move from focusing on the squeakiest wheel to proactively and predictably delivering revenue.

What your organization needs to know to predictably deliver revenue

In your business

Will you deliver on your revenue plan?
Where should you deploy your resources?
Are territories optimized?
Which teams are most effective?

In your team

Which accounts will churn or renew?
Where can you upsell or cross sell?
Are the right accounts being worked?

In your territory

Which accounts will churn/renew?
Where can you upsell or cross sell?
What relationships can you leverage?
Where is your whitespace?

In your deals

Are the right opps being worked?
Are you getting traction with the right contacts?

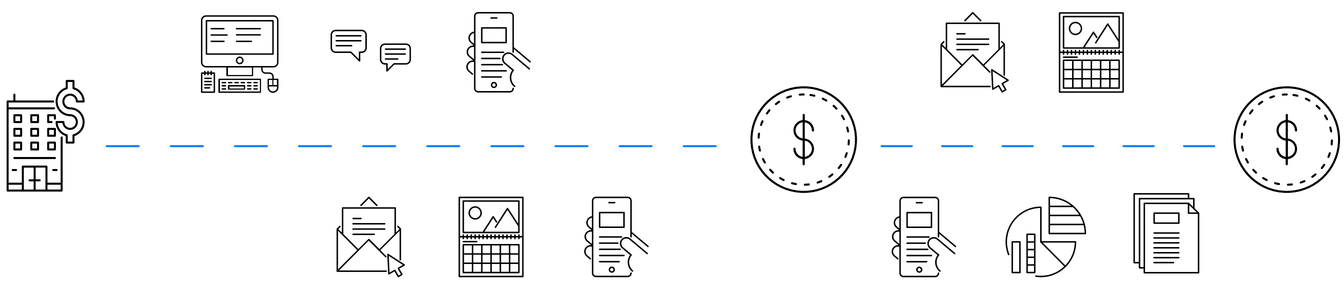
As part of an overall Revenue Operations framework, Revenue Intelligence turns revenue data into actionable workflows that activate your GTM strategy. It's not just about insights, it's about embedding those insights into your operating rhythm in a way that you can use to manage your forecast, pipeline, team performance, opportunities, and accounts.

Before we dive into how to leverage Revenue Intelligence at every level of your business, we must first understand what data we are using to inform our actionable insights, along with some of the challenges leaders today face when trying to access that data.

Revenue teams have myriad tools to help them measure individual activity signals. However, pulling siloed data together to provide meaningful and actionable insights that can be leveraged in GTM execution is time consuming and often impossible.

Here's an example of a typical customer journey:
A prospect comes through your website and connects with your team via a chatbot. The sales rep employs a sales engagement tool for an initial touch. Marketing nurtures this prospect through Marketo. Meetings are booked, the call goes great, and the rep sends over some resources through a sales enablement platform that the prospect opens.

The deal is forecasted to close this quarter, but is that really the case? Are the right buyers involved? Are follow-up meetings booked? Where can you see all of this engagement data in one place, easily?



Imagine trying to manually bring all that data together across all your accounts and opportunities to properly inspect your business and see where you have risk and where you have opportunity to accelerate revenue. Our eyes glazed over just thinking about it too.

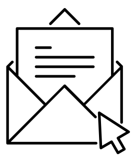
You need a clear picture of your team's activity data to understand the full story.

What is activity data and why is it so critical to this process?

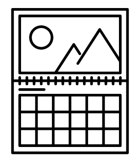
What is Activity Data?

Activity data tracks every interaction your sales, marketing, and customer success teams have with accounts. Activity data also—and arguably more importantly—tracks the return interaction coming from those same accounts.

Activity signals include:

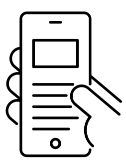


Emails

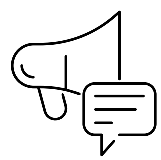


Meetings

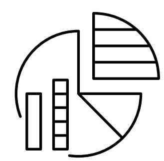
Attachments and files



Phone calls



Signals from marketing automation systems



Activity from sales enablement tools

As seen above in the customer journey, a lot of interactions occur throughout the sales cycle. If you have disparate tools tracking each of these activity signals, or your teams are not aligned in how they are tracking this data, your GTM execution often goes off the track.

And while your CRM is an essential system of record to manage account and transaction information, it won't give you a complete and up-to-date picture of what's going on in your business because it requires a lot of manual data entry from your reps. Which rarely happens, since it's time-consuming and painstaking.

Manual data entry creates inefficiencies, wastes valuable time, and leaves out key information. Blindspots surface. You may realize you don't know how accounts are engaging with marketing programs, who the decision makers are, and which opportunities have stalled, with no response. Missing activity data leads to incomplete insights and inefficient collaboration. Revenue teams cannot be strategic and marketers lack visibility into how they can support or attribute their efforts to revenue.

Automatic capture and time-series analysis across different activity signals—from CRM, marketing automation, email, and other business systems—put the "intelligence" in Revenue Intelligence. It's the only way to drive total visibility across your revenue process.

Revenue Intelligence is one of the critical requirements for your Revenue Operations Platform to align your revenue team with efficient operational cadences and deliver predictable revenue quarter after quarter.

How to Turn Activity Data Into Execution Insights

We'll explain how execution insights can be leveraged at each level of your business and provide powerful use cases that demonstrate the impact Revenue Intelligence brings to your organization.

Know What's Going On in Your Deals

Imagine a large deal where the customer stopped responding to emails, or a small deal that consumes all your rep's time. Neither scenario seems ideal. In order to properly inspect the health of a deal and identify either of these troubling patterns, managers need real-time visibility into who's engaged on the deal.

Is there a next meeting scheduled?
Do you have access to the executive buyer?
Does this deal look like other deals we've won in the past?

One-on-one sales meetings are more often spent inspecting deals, instead of coaching and strategizing. Managers spend too much time asking questions, and reps waste precious time sharing updates deal by deal, leaving little time for deal strategy.

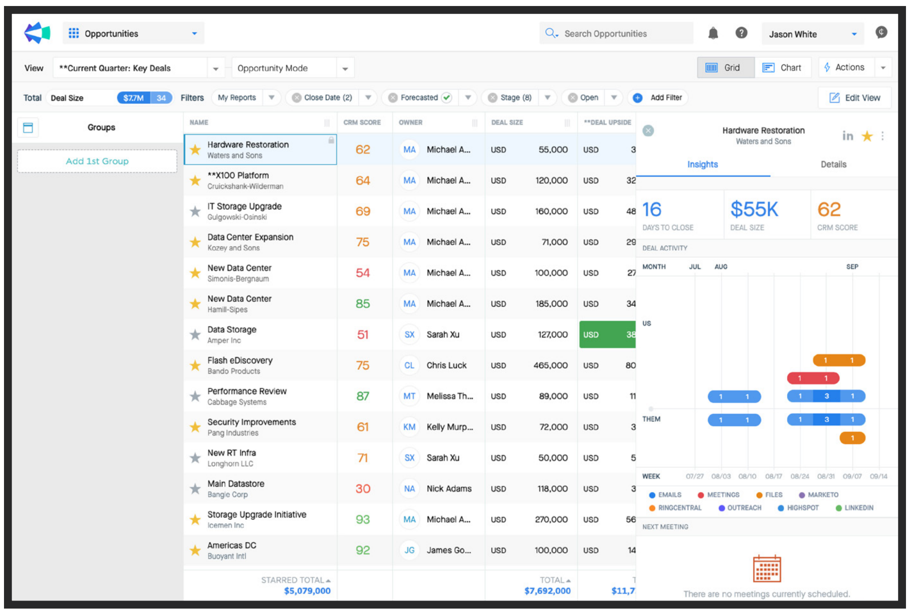
So, how do you get the most productivity out of your team?
How can you help reps and managers prioritize the deals that require their attention, rather than waste time on updates for deals that are already on track?

Instead of focusing on the squeaky wheels that appear to need the most attention, you need to understand the true state of your opportunities, in order to focus on the deals that matter most.

Identify opportunities at risk

Sometimes, it can be easy to spot a risky deal. But what about the deals that silently slip away? Closed date gets pushed out, prospect engagement is dropping, or you have no connection to the powerbase?

What if you could identify them, and take action before they slip?



With Revenue Intelligence, you can easily find the answer to these four questions:

1. **What's changed in the deal?**
   If a close date has been pushed out multiple times or a target price lowered, that might signify a deal at risk.

2. **Is the deal behaving like previous deals that have been won or lost?**
   For example, Clari's AI-driven CRM Score analyzes the behavior of previous closed won or lost deals and compares that to current in-flight opportunities. That results in a numerical score based on the likelihood that a deal will close.

3. **Is the prospect engaged or not?**
   With a comprehensive view of activity signals, you can easily see when a prospect stops booking meetings or responding to emails.

4. **Is this opportunity following the sales process?**
   If critical deal data is missing, such as sales methodology criteria, your rep may not have all of the necessary information to drive the opportunity to close.

Accelerate deals

One of the biggest benefits of knowing what's going on with your deals is the ability to identify which opportunities can be accelerated. Are there deals that are highly engaged, but might be in commit for next quarter?

If there are opportunities that are tracking to close in future quarters, but trending well, you could pull those deals forward to help de-risk your quarter and ensure you're hitting your number.

This strategy is where collaboration with other revenue teams comes into play. Is there a relevant marketing campaign or event you can leverage to accelerate conversations? Can an executive introduction be made?

It's not just about the visibility to see that deals are going well. It's about an inspection cadence that turns those insights into actions to close deals, faster. Are these insights being surfaced regularly in one-on-ones, forecast calls, and pipeline calls?

They should be.

—Clari gives us the insights we need daily, if not hourly, to assess and measure the execution against our goals.

Steve Fitz
CRO @ Sumo Logic

Engage a multi-threaded approach

Whether it's to save a squeaky wheel, accelerate a high performing wheel, or simply keep the wheels turning predictably—there's a science to the art of sales when it comes to de-risking deals or renewals. One of the best strategies: Getting multiple buyer stakeholders involved and invested in the deal.

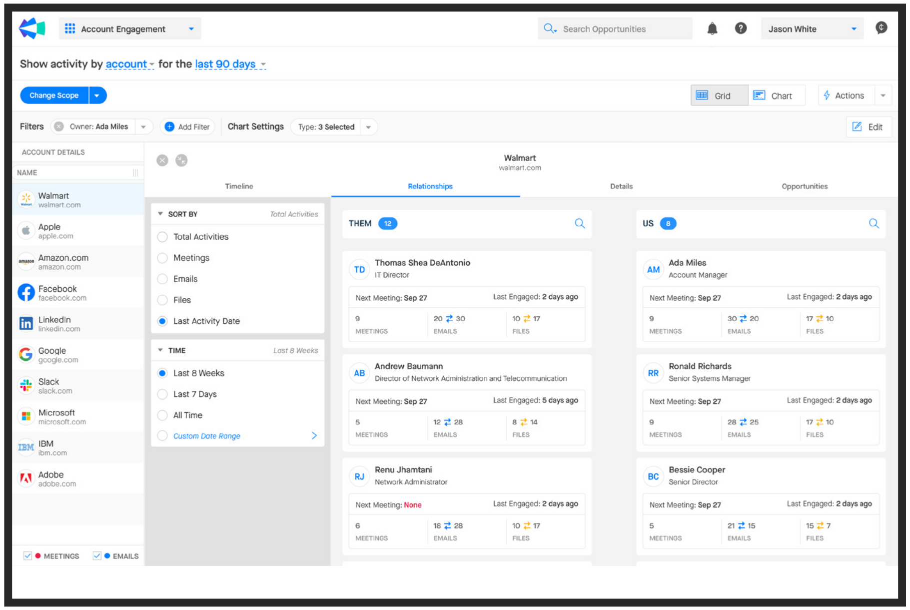
But how can you ensure your reps are getting multi-threaded?

First, you need to be able to clearly see who is engaged on both your side and the customer side. Are you getting traction with the right stakeholders across the buying group?

A lot of deals slip because a key decision maker, such as finance or IT, is not engaged early enough. In today's current uncertain economic environment, where new purchases are examined under a microscope, a roadblock from a key stakeholder can seemingly pop up out of nowhere if these personas are not engaged early.

This engagement isn't just limited to actions taken by your rep. There are creative ways to get multi-threaded. An executive reachout, a marketing event or campaign, or a board level introduction can be a gamechanger.

Whether you're saving a risky deal or pushing a healthy deal forward, it is important to get a complete picture of the frequency, recency, and quality of interactions across your deals so you can quickly understand pipeline health and what you can do about it.



Understand Your Territories

Sales and customer success leaders need to master resource management of accounts in their territories. Knowing your standing with your accounts can ensure your execution aligns with your strategy, and your team is focused on the right accounts.

Revenue intelligence within your territories means understanding how reps are engaging with those accounts, which accounts are at risk, and what the whitespace potential is, so you can strategically allocate resources to drive higher customer retention and increase market penetration.

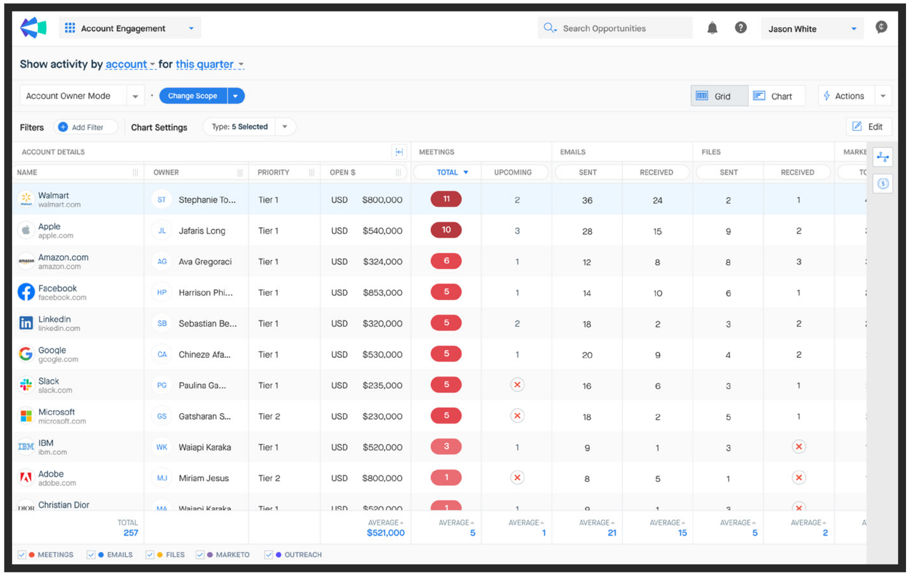
Territory assignment

Territory assignment can be painful if you don't have an accurate picture of which accounts are engaged. For example, if you break up your territory by giving each rep 100 accounts, that may seem balanced, but some of those accounts are likely to be more engaged and demanding than others.

Instead of splitting territories by count, leverage activity data to easily identify which territories need additional resources, understand which accounts require the most engagement, and justify territory assignment changes.

Start by tracking account coverage across your reps to ensure that all accounts are touched. Then, check account engagement in real time to understand which reps are engaging with their accounts.

You can make changes on the fly if your reps' capacity is tapped out, or support them with additional resources. Or, you can justify additional headcount based on real-time visibility into account engagement, not just hearsay.



Visibility into all key stakeholders

The customer journey doesn't end when the contract is signed. Customer Success' first engagement with a new client is critical. Unfortunately, most newly signed customers are handed off with little to no information, including who the main stakeholders during the buying process were.

An ineffective transition makes onboarding more difficult, and disrupts both the sales and customer success teams. Sales reps work hard to build relationships. Providing customer success managers (CSM) a line of sight into the main players can keep clients engaged, predict churn, and prevent loss.

> —It used to be a clunky post-sale handoff from sales to customer success due to missing contact information. With Clari, all the relevant contacts are automatically captured throughout the sale, making it clear who the right people are to engage with.
>
> Patricia Menadier
> Sr Director Revenue Operations @ Armis

Customer retention

Knowing when accounts will churn or renew is vital. But revenue intelligence does not stop there. Managing accounts should be a seamless process throughout the customer journey. Customer success and account management teams should focus on the right accounts at any given time to protect your base and grow customer relationships.

Revenue leaders can do this by having visibility into how accounts are engaging with reps to uncover blindspots and help team members see which opportunities or accounts are missing outreach or responses.

Time management is crucial to supporting the accounts that need the most. When you're tracking activity and engagement, you can easily visualize how much time each customer success manager is spending with his or her customers, and measure the engagement accounts are reciprocating. Managers can quickly identify if certain accounts are neglected and take action to re-align resources. They can also ensure that high annual recurring revenue accounts are getting the attention they need, and vice versa.

> —The Achilles' heels of the SaaS model is really the retention not being where it needs to be. If you have a leaky bucket and you're losing as many customers at the bottom of the bucket as you're adding at the top of the bucket, then you are not going to grow.
>
> Yamini Rangan
> Chief Customer Officer @ HubSpot

Know What Your Reps are Doing

One-on-ones and rep level coaching are only as productive as the data the rep and manager can access together. In order to coach your team based on data rather than intuition, you need activity data.

Use actionable insights about the likelihood of deals to close, pipeline changes, and activity metrics to give reps strategic guidance on how to nurture their accounts and move their deals forward. How are you asking and answering these questions?

- Where are your reps spending their time?
- Which reps do not have enough pipeline coverage against quota?
- How are reps performing against yearly attainment?
- How are new reps ramping?

Revenue intelligence helps you answer these questions and leverage the real-time data to coach reps strategically in a way that pushes deals forward.

Reps: CEOs of their territory

When your reps have access to the full power of Revenue Intelligence, they can easily understand how they're tracking towards their goals. They know which deals are on pace to close and which need more attention. They also know whether or not they have coverage to hit their quota, for both current and future quarters.

This data empowers reps to build an account strategy that not only helps them engage with all their accounts, but also ensures they spend time on the accounts and opportunities that matter most. Reps can easily see where there's risk, such as a lack of engagement or missing key decision makers, so they can proactively get support from their managers or other revenue teams, such as marketing.

These insights allow reps to make strategic decisions on how to spend their time and where to focus for the maximum revenue impact.

—Clari shows insights into my pipeline, best case, and commits. From there, I can determine whether to create more pipeline or focus on progressing open opportunities. It's a precise guide to where I should focus my efforts.

Ana Rivera
Account Manager @ Fortinet

Identify winning patterns

When you can see your entire team's activity data, it's easier to see what's working and what isn't—then share those insights with the rest of the team. If your most successful reps send 60 emails a week, and your least productive reps only send a dozen, the latter group may need some tools or coaching to increase their email cadence.

Or, maybe top reps are focusing on a smaller set of accounts with higher performance outreach. Managers can use that data to set benchmarks to improve performance across the team.

Letting data take the lead in your coaching prevents tough conversations from feeling personal to reps that are struggling. Instead, revenue leaders can use the data to create easily identifiable goals, reward success, and provide concrete examples for how
to improve.

—One of the hardest parts of any sales manager's job is to discuss performance issues with a rep. But it's also one of the most important. To ensure that emotions and finger-pointing stay out of the discussion, it's absolutely critical that the manager focus on the data.

Grace Tyson
Sales Manager @ Chorus.ai

Prevent attrition

With a bird's-eye view of a rep's aggregated activity, managers can quickly identify dips in production. If activity shows steep drops in emails sent or meetings booked, that may be a sign a rep has lost motivation or checked out. When activity data is automatically captured and synced to sellers, managers get powerful intelligence to identify and address any concerns before it's too late.

> —In sales, you can't always control your results, but we can set goals that will help reps focus on the things they can control, like emails to prospects or meetings set. Getting them to spend time on that is a way to make them feel more powerful.
>
> Kyle Coleman
> VP of Growth and Enablement @ Clari

Know What's Going On in Your Business

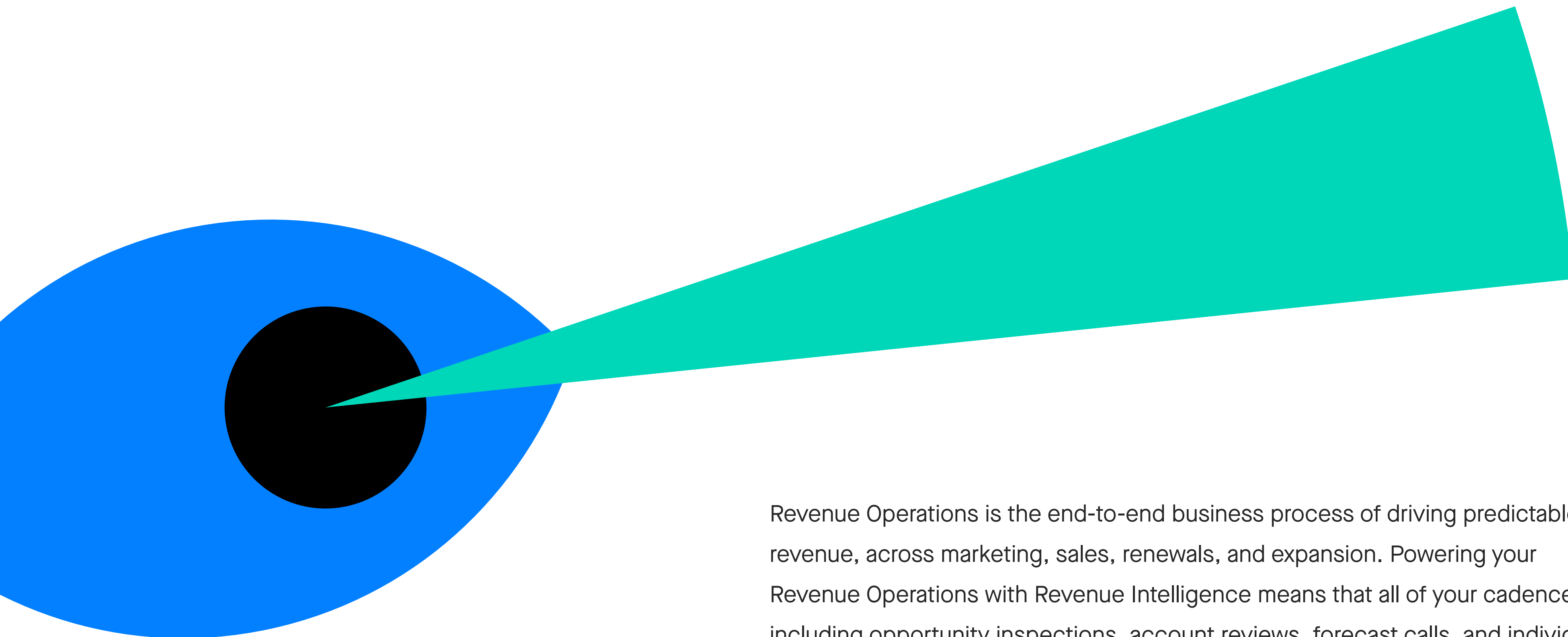
Visibility into your accounts and opportunities, your territories, and your reps gives you the full picture of what's going on in your business. More importantly, it gives you confidence in where you stand with the forecast and your ability to make strategic investments, such as accelerating hiring or adjusting the operating plan.

This holistic understanding of your business—along with the ability to execute on those insights—drives predictable revenue, quarter after quarter after quarter.

—As our business continues to grow, consistent inspection of current and future quarters at any level of the organization is paramount. Clari is what we all look at in one-on-ones, QBRs, and forecast calls, as it provides the most accurate view of the business – pulling signals not only from CRM but also our email, calendar and even our own customer messaging platform.

Ryan Wilcox
VP Sales Operations @ UiPath

Revenue Operations Powered by Revenue Intelligence



Revenue Operations is the end-to-end business process of driving predictable revenue, across marketing, sales, renewals, and expansion. Powering your Revenue Operations with Revenue Intelligence means that all of your cadences, including opportunity inspections, account reviews, forecast calls, and individual one-on-ones, are guided by up-to-the-minute insights.

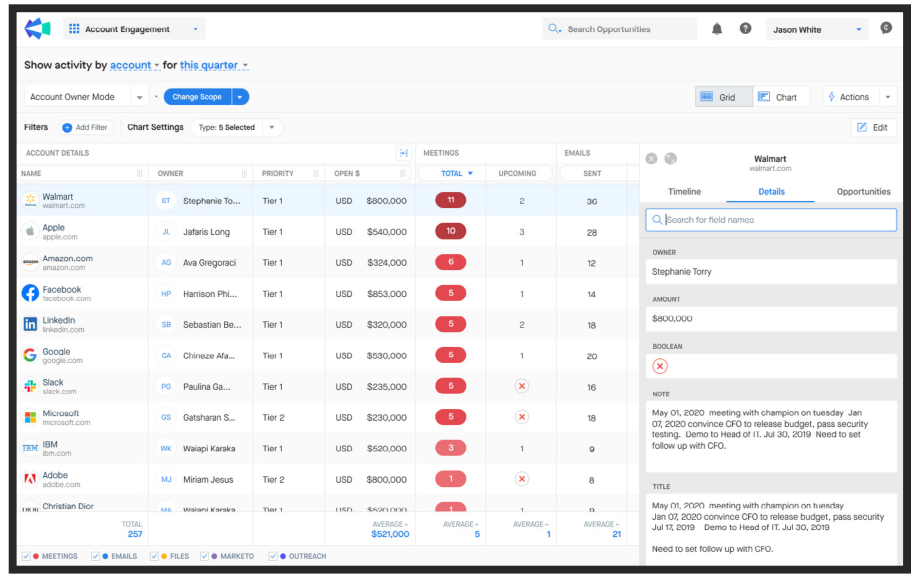
The end result: total visibility into your business and exceptional execution from your team.

Get Revenue Intelligence with Clari

Clari tracks the complete history of all your revenue data—from CRM, emails, meetings, call logs, and more—and uses AI to transform those signals into valuable insights.

The days of making decisions based on stale data or your team's intuition are over.

This means your revenue leaders have total visibility to understand, in real time, what's occurring at the business, rep, territory, and deal levels. You can zoom out for a full picture of the entire revenue organizations GTM strategy, helping you drive strategic alignment. Or you can hone in on the level of detail needed to make data-driven decisions that close more deals, faster.



Ready to Supercharge Your Team with Revenue Intelligence?

There's enormous growth potential for companies that are able to leverage Revenue Intelligence across their Revenue Operations: improved pipeline inspection and coaching, increased data-driven deal execution, and integrated account management—just to start.

Access to activity data and execution insights unlocks your entire organization's ability to drive predictable revenue. You're able to move away from reacting to every squeaky wheel and execute your go-to-market strategy with confidence. Your entire team, from operations to marketing to sales to customer success, knows exactly where their strategies fit to ensure the revenue team is running like a well-oiled machine.

If you're ready to put revenue intelligence to work and drive your revenue operations, we can't wait to chat with you.

Book a demo here.

Clari

Clari's Revenue Operations Platform improves efficiency, predictability, and growth across the entire revenue process. Clari gives revenue teams total visibility into their business, to drive process rigor, spot risk and opportunity in the pipeline, increase forecast accuracy, and drive overall efficiency. Thousands of sales, marketing, and customer success teams at leading companies, including Okta, Adobe, Workday, Zoom, and Finastra, use Clari's execution insights to make their revenue process more connected, efficient, and predictable. Visit us at clari.com and follow us @clari on LinkedIn.