



TRANSFORMING SALES — THROUGH AI —

A day in the life of Jane Smith





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“We always overestimate the change that will occur in the next two years and underestimate the change that will occur in the next ten. Don't let yourself be lulled into inaction.”



Bill Gates

Introduction

AI is poised to fundamentally disrupt your sales process. In fact, it already has.

Although, the very mention of AI conjures up surreal images of robots running riot, at the moment, it is in the ballpark of autocorrect and intelligent search suggestions. Sure there is the odd **AI-gone-out-of-control** news that we hear about and not that sentient machines aren't a possibility in the future. The real & tangible impact of smarter applications is already afoot. Applications that adopt AI, even in its nascent form, are delivering improved customer success and delight by an order of magnitude.

Applications have evolved from being diagnostic, like erstwhile ERPs, to prescriptive, helping business leaders make data driven decisions ahead of the curve. It is estimated that 40% of companies will adopt AI within the next two years (**CXO Today**) and the amount by which AI-powered activities in CRM alone could increase global business revenues by \$1.1 trillion in the next 4 years (**IDC**).

In this backdrop, let us take a look at a day in the life of Jane Smith, Sales Executive at **The Giant Corporation (TGC)**.

8:00 AM

Strategy & Planning



The difference between a top sales rep and a bottom sales rep is, at a minimum, a trillion dollar question. And the answer lies, essentially, in what happens between calendar events. AI helps plan and optimise these activities for Jane.

Day Plan

The image displays a central smartphone screen showing a 'Recommended Plan' for Jan 12, 2017. The plan is organized by time slots:

TIME	EVENTS
08:30 AM	Email Alex of Medalytics (prospect).
10:15 AM	Video call session with Jack w.r.t. Orion (prospect).
10:40 AM	Call Sarah of HealthAssist (customer).
11:00 AM	Review proposal to Armor Inc.
11:20 AM	Catch up with Marketing Team.
	Review leads ready for closure. Close the deals.

Overlaid on the left is an 'Overview' dashboard with the following data:

Leads	Sessions	Events
29.4M	71.6M	200.2K

Below this is a 'Leads over time' chart showing a total of 29,436,140 leads, with a +4,125,678 (12.6%) increase. The chart compares the 'Current Period' (red line) against a 'Comparison Period' (grey line) from Jan 1 to Apr 1.

Two notification pop-ups are overlaid on the right side of the phone screen:

- Notification 1:** 'Over a week since last engaged with Alex of Medalytics. Send Email. Highest response time is 8:30 AM. Email Content in Template 4. CONTINUE'
- Notification 2:** 'HealthAssist subscription expiring in 45 days! Call Sarah. Suggested meeting time: Tue, 22 Feb 11:00AM. SCHEDULE'

Under the hood



AI compares Jane's Mondays with those of top performing sales reps in the organisation and across the industry. The data is then crunched to reveal intelligent insights about Jane's schedule. Who should she meet? How should she prioritise prospects? Which one of her clients responds best on Mondays? What must she do today to improve her chances of meeting her quarter's goals? What activities do Jane's Manager & VP-Sales think she must prioritise? How does a Monday schedule look for the most successful sales executives?

AI optimises and schedules calendar activities for Jane to optimise the route plan and maximize Sales ROI. Sales Leaders now get 360° view of Sales activities & Sales outcomes, translating them into coaching inputs for Sales executives to better engage with customers. Business Leaders get insights on whether Sales teams are investing efforts on strategic products & customers.

Fact File

“ In the next few years, Machine learning will improve sales and marketing software by giving it the ability to do things without us explicitly telling it what to do. ”

- Dharmesh Shah, Founder and CTO, Hubspot.

10:00 AM

Knowledge & Research



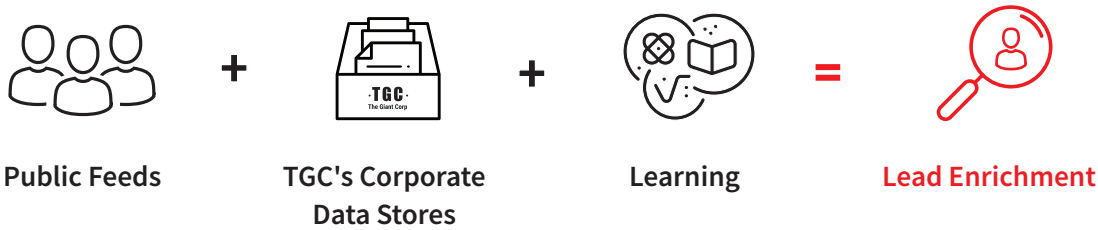
AI helps Jane stay on top of real time data that is relevant to prospects and key accounts. Jane can better tackle changes that impact her sales performance.

latest updates

A composite image showing a dashboard with charts and an alert notification. The dashboard is titled "Good Morning, Jane!" and features three main charts: "LEAD GENERATION" (Overall Growth 20%, Average Daily 35%), "REVENUE GENERATION" (Overall Growth 30%, Average Daily 45%), and "ENGAGEMENT FREQUENCY" (Overall Growth 40%, Average Daily 65%). Below these is a "TEAM STATS" chart. An "Alert!" notification is overlaid on the dashboard, stating "Decision Maker changed! Jack Barkley is the new VP - Sales & Distribution at Transient Inc." with "Learn More" and "Call Jack" buttons. The dashboard also shows a profile for Jack Barkley with a "Connect" button. The dashboard is branded with "TGC The Giant Corp" and "Jane Smith".

enriched profile

Under the hood



AI tracks all of TGC's accounts and contacts from various public feeds. So, a change in the professional profile page of a key contact is flagged off to the respective sales rep as a potential action item. In this case, AI alerts Jane of a personnel change in a customer account and suggests related next best action.

The World is more intricately entwined now more than ever before and it is imperative for sales people to be on top of metadata at the levels of the organisation and industry. With the continuing expansion of scope and depth of searchable content on public directories, all of this data is easily accessible. In fact, there are various services today that integrate data from multiple profiles and enrich account and contact data in sales systems to deliver Opportunity Enrichment inside your existing CRM systems. Simply knowing and acting on all of these data points could make the difference between mining an account further for increased revenues vs. a churned customer.

Fact File

2/3 of B2B marketers identified engaging key decision makers as their top challenge. *[Source: Forrester Research]*

11:00 AM

Qualifying Leads & Prospecting Opportunities



AI filters leads from Marketing campaign and assigns the most optimised leads to Jane, basis her sales history. She can also track her probability of closure dynamically for each lead.

lead optimization

A screenshot of a CRM dashboard for a user named Jane Smith. The dashboard is titled "T&C THE GREAT COMP" and shows a "NEW LEAD" notification for Tom Shephard, assigned by the Market Research Team. The lead's profile includes his name, location (San Francisco Bay Area), and a "PROBABILITY" of 89% for closing the deal. The dashboard also features an "ENGAGEMENT SUMMARY" line chart, a "BEST DAYS FOR MEETING" calendar, and a "SALES HISTORY" bar chart. A "LEADS" sidebar lists other leads with their names, companies, and recommended actions.

New lead assigned.
BY: Market Research Team

[Connect](#) [View Profile](#)

Tom Shephard
San Francisco Bay Area

PROBABILITY
89%
probability of closing the deal.

ENGAGEMENT SUMMARY

BEST DAYS FOR MEETING

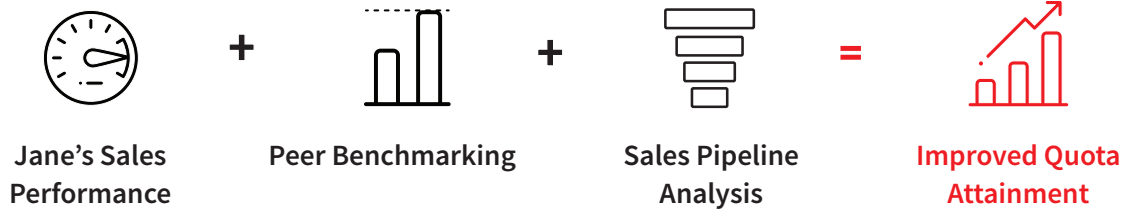
SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

SALES HISTORY

LEADS

- Austen Herrera** (Globex Corp)
Call him and follow up.
- Juliet Rose** (Soylent Inc.)
Send quotation.
- Hugo Reyes** (Initech)
Schedule meeting APD.
- Jack Walter** (Vehement Capital)
Follow up on proposal.

Under the hood



AI compares leads generated by marketing with historical sales records and allocates the lead to the sales rep with the best probability of closing that lead. Opportunity is prioritised on the basis of competitiveness, quality of engagement, responsiveness, affinity, and sales representative. This helps reduce sales effort on irrelevant leads, while improving the probability of closure.

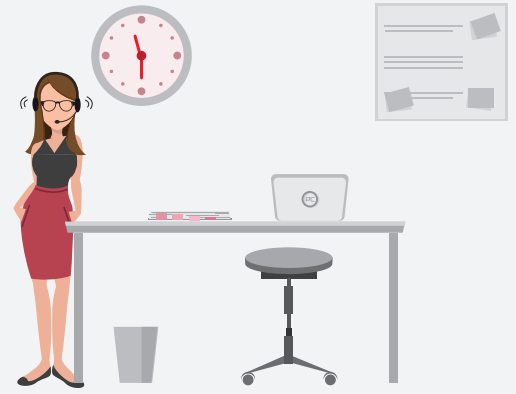
Over a period of time, intelligent allocation helps Jane build expertise in products and sectors. AI also benchmarks sales rep performance with upper quartile reps, so that they are coached to improve Sales productivity. Sales leaders can diversify their teams across products and services, so that their efforts are optimised.

Fact File

25% of leads are legitimate and should advance to sales.
[Source : Gleanster Research]

35-50% of sales go to the vendor that responds first.
[Source: Insidesales.com]

11:30 AM Communication



AI can optimise Jane's tasks to improve her probability of closure. She can now focus on her core activities that require her discretion and that are directly linked to sales.

call analysis

A composite image illustrating AI-powered call analysis. In the center is a smartphone screen displaying a 'Call Analysis' report for a call with Jack Barkley. To the left is a call agenda card with a lightbulb icon. To the right is a 'Today's Plan' calendar showing a call at 11:30 AM and lunch with Jack Barkley at 1:00 PM.

Best time to call Jack Barkley
11:30 AM and 11:50 AM.

Discussion Agenda
Decision Maker has changed!
Re-establish relationship.

Call Analysis

Jack Barkley
VP Sales, Transient Inc.
jackbarkley@transientinc.com
+1 002 4567 90

CALL SUMMARY
04 min 57 secs Today
Outgoing Call 11:37 AM

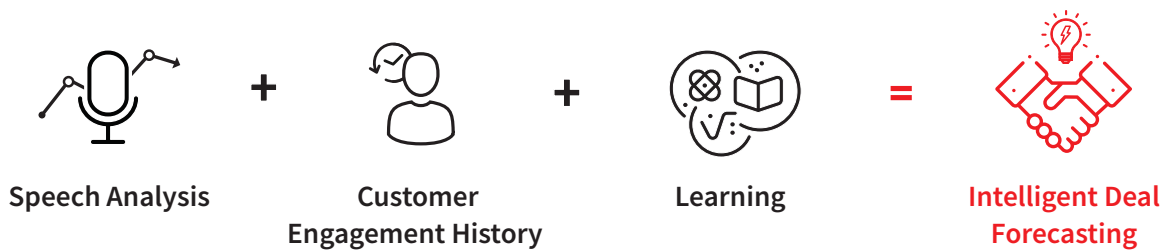
CALL RATING
4 / 5
★★★★☆

CALL RESULT
Good Job!
Jack free for lunch today.
1:00 PM would be the ideal time.

Today's Plan

TIME	EVENTS
	Mail proposal to Client A.L.
11:30 AM	Call Jack Barkley.
12:00 PM	Prepare presentation.
01:00 PM	Lunch with Jack Barkley.
02:00 PM	Prepare quote for Jack.
02:30 PM	Follow up with Medcorp.

Under the hood



AI records and analyses audio interaction in real-time; by using language processing and speech recognition algorithms, the call is parsed. Keywords that indicate positive or negative outcomes are tracked, and the overall emotion of the conversation is also measured. Based on this data, the call is scored and patterns are identified. The sales rep is offered coaching on the line of communication to use, keywords to avoid & keywords to watch out for.

Business leaders can avail micro level insights in every day sales activities, understand skill gaps, correct them and help sales teams perform better. Leaders can also improve their deal forecasting, and dynamically course correct on the basis of real time customer feedback.

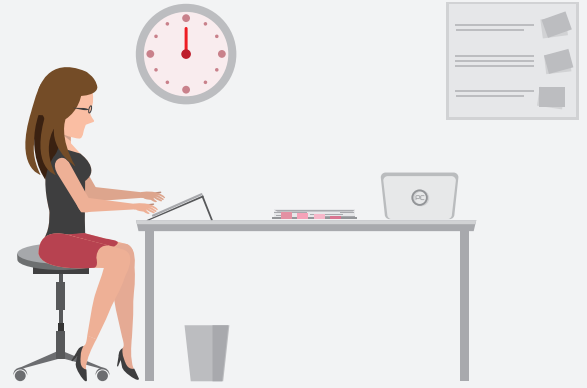
Fact File

If you follow up with web leads within 5 minutes, you're 9 times more likely to convert them. [Source: Insidesales.com]

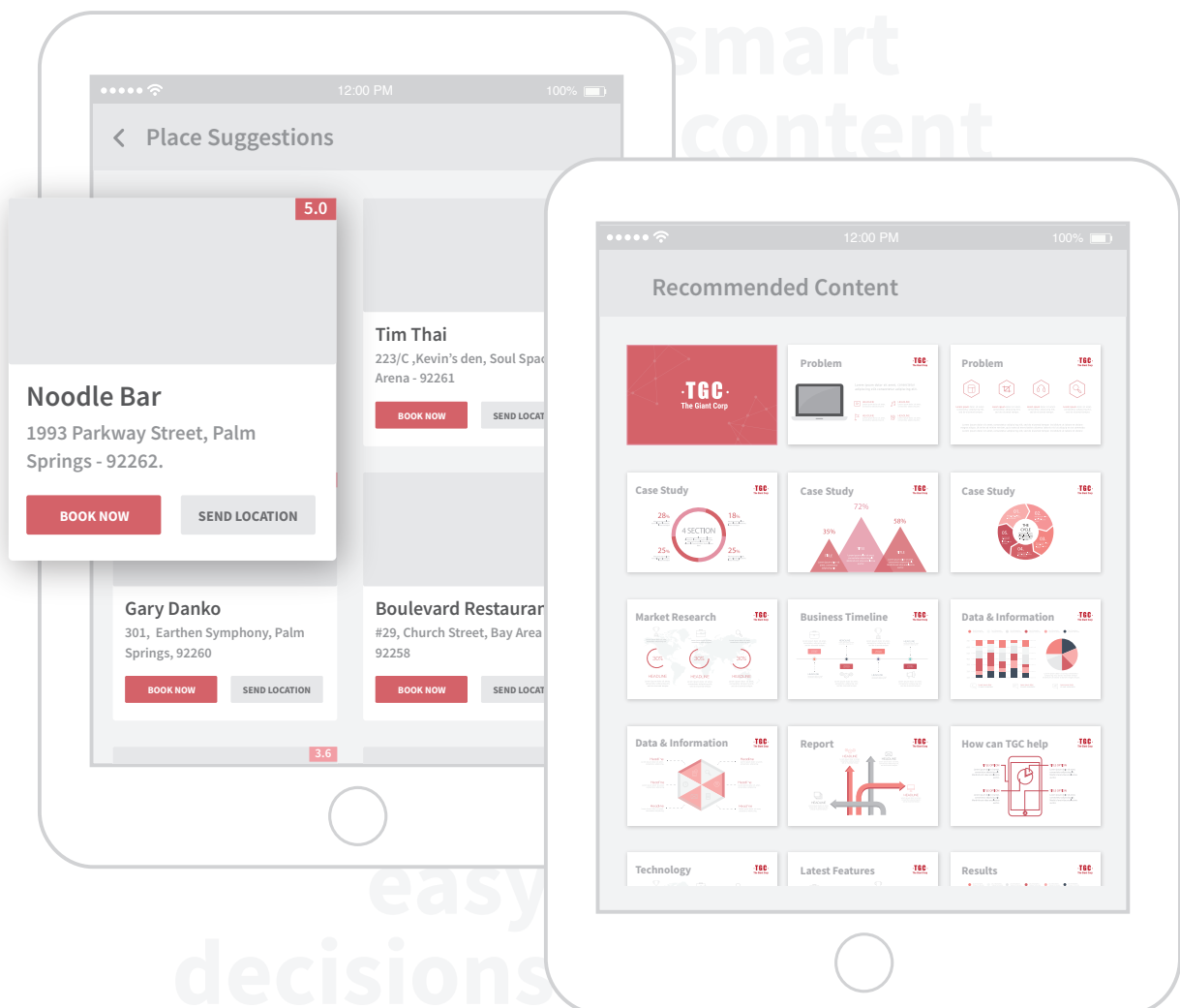
In 2007 it took an average of 3.68 cold call attempts to reach a prospect. Today it takes 8 attempts. [Source: Telenet and Ovation Sales Group]

12:00 PM

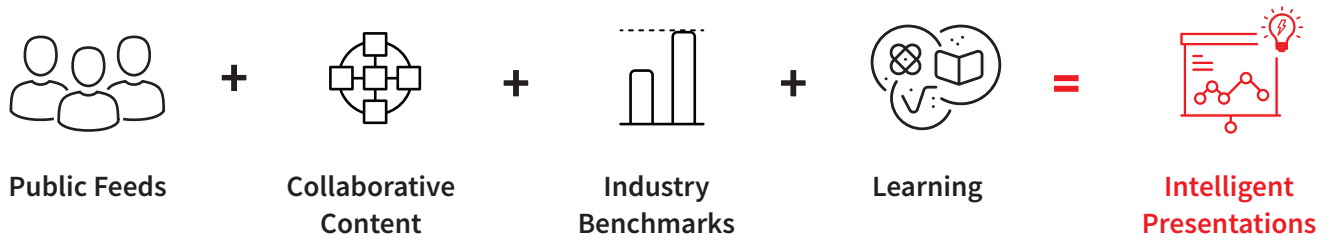
Presentation & Demo



AI acts as Jane's high-functioning personal enterprise assistant by helping her prepare for her meeting with Jack and managing all of the logistical details of her work.



Under the hood



AI summarizes recent interactions, recommends effective presentation style & content for the presentation ahead of Jane's upcoming meeting. Content is sourced from latest decks within the organisation and also benchmarked to industry. Based on context of the meeting (proposal, follow up, other scenarios), AI can help populate slides with content, images and metrics.

Further, it can then give feedback by scoring the presentation against how similar presentations have been perceived by a database of viewers. So, presentations can be scored on a number of parameters, ranging from persuasive to confusing. These systems can get more real-time in the imminent future, offering speakers instant analysis on how they are presenting.

Fact File

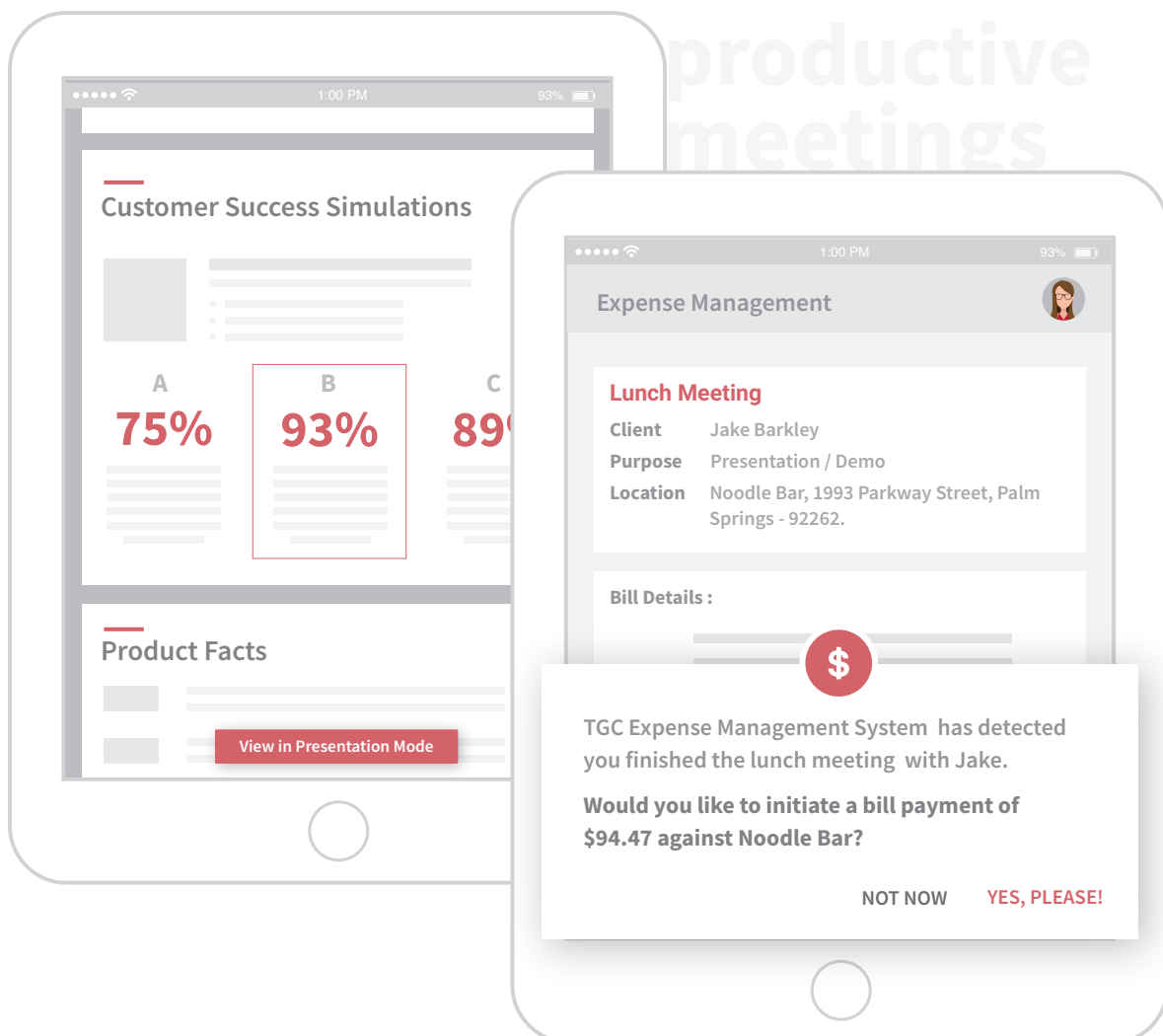
Nearly **57%** of B2B prospects and customers feel that their sales teams are not prepared for the first meeting. *[Source : IDC]*

1:00 PM

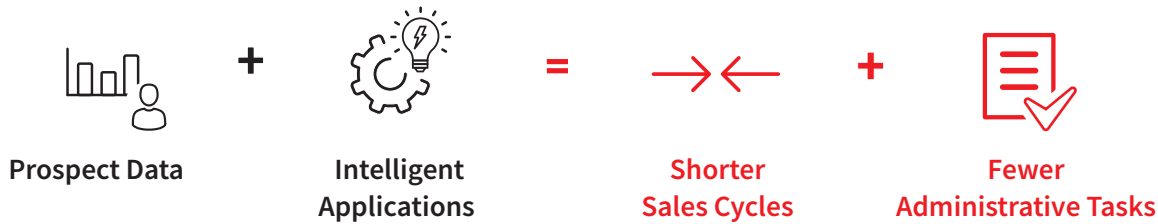
Lunch Meeting



AI enables real time simulations for Jane, so that her modelling and analysis can use real time data and translate into tangible insights. AI also helps automate non-core activities for Jane.



Under the hood



AI can help simulate customer scenarios in real time on a demo environment. Sales people like Jane do not have to depend on Delivery teams to customise products and services for prospective customers. Instead, they can provide contextual data and have smart applications realign metrics and dashboards to reflect a customer scenario. This helps collapse sales cycles further as prospects can understand true value of products and services.

Also, administrative tasks can be automated through smart applications, so sales people can focus on core activities. Sales leaders can also track and improve productivity of their teams, based on time and effort invested in these activities.

Fact File

After a presentation, **63%** of attendees remember stories. Only **5%** remember statistics. *[Source: Dan & Chip Heath]*

2:00 PM

Quotation & Closure



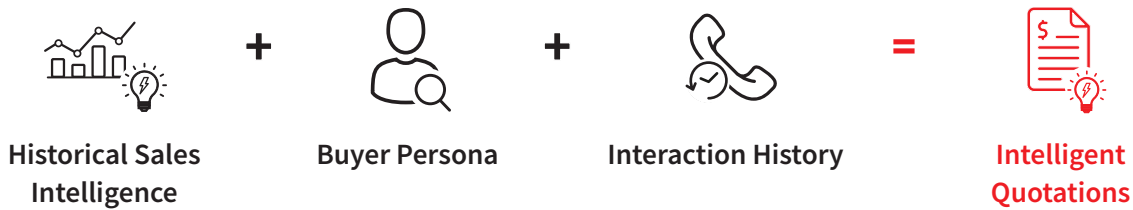
The system intelligently recommends optimal products & services that have the highest probability of purchase and best possible gross margins.

better pricing

The screenshot displays a CRM interface for 'Transient Inc.' with the following components:

- Meeting Analysis:** Profile for Jack Barkley, VP Sales at Transient Inc. Metrics include 14Mn, 21K, 80%, and 471. A bar chart is visible below the metrics.
- Recommended Quotation:** Shows a 89% closure probability for a 140K quotation price, and a 68% closure probability for a 180K quotation price.
- Email Analysis Overlay:** States 'Good Job! The reply seems positive.' and '92% chances of closure.' with a recommendation to 'Revise the quotation and send by today EOD for best results.'
- Share Quotation Button:** A red button labeled 'Share Quotation' is located in the top right of the interface.
- Success Notification:** A red checkmark icon with the text 'Meeting details updated successfully on CRM+' is positioned on the left side.

Under the hood



AI recommends range of pricing on the basis of buyer persona, account potential, organisation health, closure probability and historical sales data. AI analyses customer response to the quotation and suggests appropriate follow up actions for Jane. All through the pricing & negotiation, AI guides Jane on discounting & payment options that will offer value to the customer, while generating best possible margins for Jane & TGC.

Fact File

71% of sales reps say they spend too much time on data entry.
[Source : Toutapp]

2:30 PM

Nurture & Engagement



AI helps Jane build better relationships with her prospects and clients by optimising nurture and engagement. Also, AI helps customise Jane's communication based on need.

new opportunities

A screenshot of a CRM dashboard for TGC Corp. The dashboard is viewed from a laptop. At the top, there's a search bar and the user's name, Jane Smith. The main content area is divided into several sections: a 'Medcorp' profile card with 'Profile' and 'Stats' tabs, a 'RECENT ACTIVITY' line chart, an 'INDUSTRY IMPACT' bar chart showing a 65% growth, and an 'ORGANISATION' section for 'Shawn M...' with a 'Contact' button. On the right side, there's a 'Similar Profiles' section listing 'MNC Pvt. Ltd.', 'Medplus Corp', and 'Alliance Group', each with a profile card for a contact like 'Jenny Aniston' or 'Shayne Ward'. A 'Send Email' button is visible at the bottom right. A callout box on the left, featuring a lightbulb icon, contains the text 'Call Alice from Medcorp', 'Module 1 Usage : 85% ↑', and 'Potential Cross Sell : Module 2 & 3', with a red 'Call' button below it. A 'Welcome to TGC!' message is visible in the top right corner of the dashboard.

Under the hood



AI can signal up / cross sell opportunities based on usage data from existing products. Historical data indicates if a customer with active usage of one or more existing products is likely to buy a related product in the suite. AI will auto-create new sales opportunities in the CRM and urge the salesperson to pitch to the customer. AI proactively seeks out sales trends that indicate how an account can be mined to deliver incremental revenues.

Powered by the same data, AI maps out the ideal customer persona, identifies, and prioritizes new opportunities within the TGC CRM.

Fact File

80% of sales require 5 follow - up phone calls after the meeting.

[Source: The Marketing Donut]

Companies that excel at lead nurturing have **9%** more sales reps making quota. *[Source: CSO Insights]*

Companies that nurture leads make **50%** more sales at a cost 33% less than non- nurtured leads. *[Source: Forrester Research]*

6:00 PM

Productivity Analysis & Learning



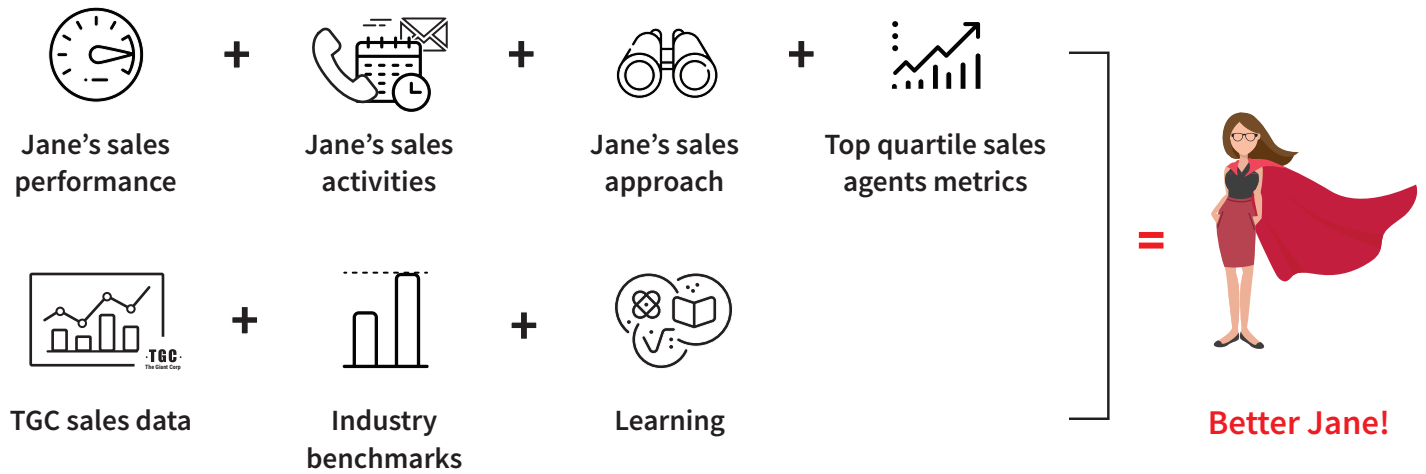
AI helps Jane review and recalibrate her efforts based on real time data. It helps Jane improve her productivity on a near real time basis.

intelligent coaching

The dashboard shows a 'Day Analysis' for Jane Smith with a productivity score of 78%. A callout box highlights a red bar in the analysis, stating: 'Aggregate time for account with no sales status change exceeded by 3 hours! Flag to your manager for creative intervention.' Below this, a 'Manager's View' table lists other executives and their productivity scores.

Executive	Rank	Overview	Productivity Score	Status
Jane Smith	#11		78%	active
Tom Sawyer	#12		76%	active
Kate Austin	#13		73%	active
Hugo Reyes	#13		73%	active
Syed Jinnah	#14		71%	active
Juliet Rose	#15		69%	active

Under the hood



AI helps organisations move beyond implementations and focus on outcomes instead. It analyses Jane's sales performance data to nudge her towards executing more high ROI activities, while also tracking calendar events, such as calls and meetings, to improve qualitative aspects of her approach.

AI benchmarks Jane's activities and approach with top performing sales people in her organisation and the industry. This helps Jane to realign her focus and also proactively upskill based on identified gaps, so she can become a better sales person. AI also helps sales leaders focus on the correct metrics and make need-based interventions. Overall, AI enablement will drive meaningful use of sales and marketing applications.

Fact File

Lost sales productivity and wasted marketing budget costs companies at least \$1 trillion a year. *[Source: The B2B Lead]*

50% of sales time is wasted on unproductive prospecting. *[Source: The B2B Lead]*

Epilogue

From planning to closure, AI will transform sales. Whether it is intelligent scheduling, lead enrichment, smart notifications, productivity analysis or more accurate deal forecasting, AI will reshape every facet of the sales cycle.

AI will help sales teams gain a more holistic picture of their prospects and customers, as well as observe patterns in the sales process and enable personalized sales engagement at scale. Enabling sales teams, large or small, to deliver customer delight throughout the sales cycle.

AI will help Business Leaders make macro level decisions with real time insights from the field. Managers can proactively coach teams to achieve their quotas and executives can finally focus on core activities that move the needle.

With all the brouhaha about AI replacing jobs, there has been much skepticism among Sales people and the general public at large. But, as the many scenarios depicted prove, AI will empower and augment salespeople with additional intelligence, rather than make them redundant.

In fact, AI will let sales people focus on more human attributes of their work, such as, empathy, higher order intelligence, and other aspects that may require an exclusively, human touch. If anything, AI will help sales people be more human. END

Build your Intelligent Sales Stack

Sales Enablement

Mobile Sales Productivity

BASE Bullhorn clari
nimbly nimble
TACT VYMO

Digital Content Management for Sales

accent bigtincan BRAINSHARK
CallidusCloud highspet
clearslide minotouch
KnowledgeTree Qvidian
SAVO OCTIV springcm
SEISMIC shoupad

Sales Coaching Systems

allego BRAINSHARK
Qstream CommercialTribe
optmyze HireVue salesforce
work.com IBM
MindTickle! CallidusCloud Sparrow

Sales Training Management Solutions

veelo SAVO Qstream
LearnDot formerstone shoupad
CallidusCloud IBM Kenexa
walkme BRAINSHARK

Sales Information Services

CallidusCloud bambora AVENTION
artesian introhive
dun & bradstreet infogroup
Datanyze broadlook

Strategic Account Management

INTERACTIVE MEDICA MEMBRAIN
Revegy SalesMethods SAVO
Miller Heiman Group ORACLE
ALTIFY zoominfo

Recurring Revenue Management

Customer Success Management

gainsight bolstra
TOTANGO Amity
Service Source RIGHTON
azuqua natero

Revenue Management for Sales

CISCO Model N PROS
ARIA ZUORA Model N
revitas
TRACT Service Source
SaaSOPTICS pramata

Sales Analytics

Sales Analytics Suites

Lattice MicroStrategy eli k
DOMO wave analytics Lattice
tableau SAP CallidusCloud
Microsoft ORACLE
IBM optmyze

Sales Predictive Analytics

clari EVERSTRING
Gainsight TopOPPS
MINTIGO sense
INSIDESALES.COM
infer leadspace

Quote-to-Revenue

Configure, Price and Quote Application Suites

CloudSense etiya experlogix
accenture infor FPX
TRACTON YADOS Verenia
intelliquip SAP Hybris KB
Vlocity Axonom Inc. IBM
endeavorcpq Cincom
ORACLE APTUS

Sales Contract Management

icertis IBM
springcm exari
revitas conga Novatus
APTUS DETERMINE
contractlogix pramata
clmatrix symfact

Price Optimization and Management

SAP PRICE FICO PTC
Model N navetti LTI
ORACLE accenture
Capgemini vendavo VISTAAR
zilliant STRATINIS McKinsey Solutions
HITACHI Deloitte IBM
APTUS synchron

Proposal Management Solutions

proposable RFP Monkey.com PRIVIA
SEISMIC Qvidian
QWILR ConnectWise
paperlessproposals OCTIV

Sales Execution Systems

Sales Force Automation

ORACLE GoldMine Microsoft
MAXIMIZER CRM FORCEPOWER Bullhorn
APEAN SAP SUFFRONT
SUGARCRM sage CRM CAC
BASE bpmonline

Partner Relationship Management

Vistex shoupad
Relayware
ORACLE LogicBay
APTUS
CCI bpmonline

Lead Management

Peppas Marketo IBM HubSpot bpmonline
salesfusion act on Velocify
CallidusCloud SUGARCRM ORACLE
IBM

Account-Based Marketing

brightlanel bizible
LinkedIn MARIANAIG
Engagio MRPEasy DEMANDBASE
vendemore triblio kwanzo

Sales Acceleration Solutions

FRONTLINE Datanyze Yesware RADIUS
conversica SEISMIC SalesLoft Outreach ringDNA ebay

Sales Performance Management

Sales Incentive Compensation Management Software

anaplan obero Vistex
CallidusCloud IBM INCENTIVES
beqom ICONIX
NICE optmyze
SAP Xactly Oracle
SalesLoft

Territory Management Software

SAP IBM ZS
anaplan AlignStar ORACLE
SalesLoft proalign optmyze

Planning Management

anaplan Adaptive Insights IBM
ops panda obero CRM ON DEMAND

Social for Sales

Social Analytics for Sales

InsideView FirstRain artesian
dun & bradstreet AVENTION
nimble

Social Media Engagement for Sales

InsideView FirstRain
LinkedIn artesian

Internal Community Software for Sales

salesforce sage CRM ORACLE
IBM SAP jive
Microsoft Microsoft Dynamics

Social Contact Enrichment for Sales

InsideView FullContact
Lattice KiteDesk

21 | Build your Intelligent Sales Stack



Vymo helps improve field force productivity through AI and Automation. Our mobile-first solution detects rep activities and predicts 'next best actions' for the most optimised outcomes. Vymo is a Sequoia-funded company and was named a notable vendor in the Gartner CRM Guide 2017.



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