

People.ai

Unlock your complete story with People.ai



Data Foundation

Establish your data foundation to unlock complete, accurate, and enriched activity data across your entire go-to-market team

1



SalesAI

After you've established your data foundation, you're ready for a fully integrated generative AI sales solution that will revolutionize go-to-market execution

2

ClosePlan

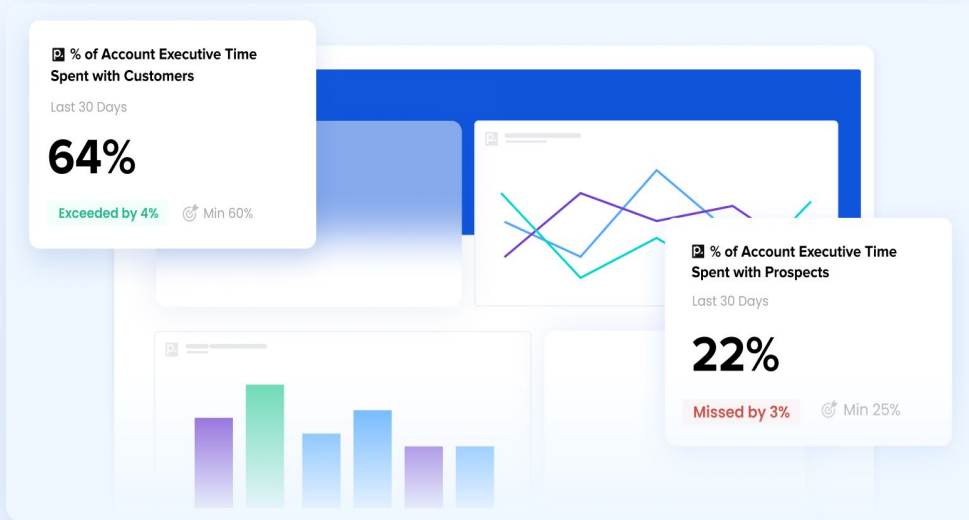
With our portfolio of tools to help you operationalize your go-to-market team, your revenue engine will be unstoppable
Account planning, Scorecards, Relationship Maps & more

PeopleGlass

Make your data accessible, improve Salesforce hygiene, and increase forecast visibility - all while saving your reps precious hours a week

Data Foundation

Your journey with AI begins with **Data Foundation**



Unlock complete, accurate, and enriched activity data across your entire go-to-market team

Increase productivity and access 360 views to understand all engagements

Proactively identify risk across accounts, deals, and teams



Increase in new business meetings

Access complete, enriched data for go-to-market transformation



Automated Activity Capture & Filtering

Automatically capture all go-to-market team engagements (calls, emails, meetings chats & more) while filtering out private and non-business related activities

Contact Creation, Matching & Enrichment

Create net-new contacts in CRM and match activities to Accounts, Opportunities, Contacts, & Leads in CRM - while continuously enriching with contact, persona, seniority, & buyer insight data

Visualize with ease & act off a single source of truth

Run your entire go-to-market team off the same dataset with out-of-the-box, interactive data tables - inside your existing tools - so you can spend less time digging, more time derisking



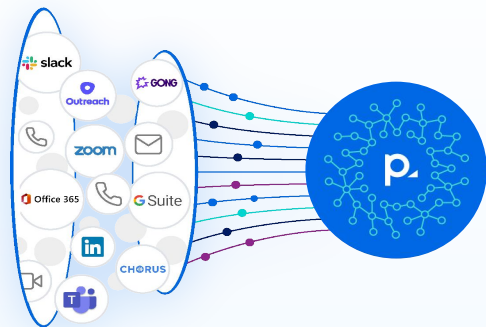
"People.ai showed us a future state where we can get unbiased, impartial, and directional data to solve the most important issues facing our company."

VP of Sales
Pluralsight

Data Foundation

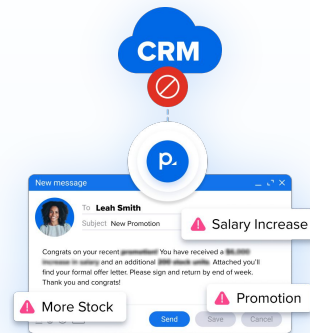
Unlock your data to understand what's happening across your go-to-market team and access insights that fuel revenue

Automated Activity Capture



Increase productivity and provide visibility by automatically processing all go-to-market team engagements such as emails, calls, web conferencing, meeting transcripts, chat messages, LinkedIn InMails, and more

Sensitive Content Filtering

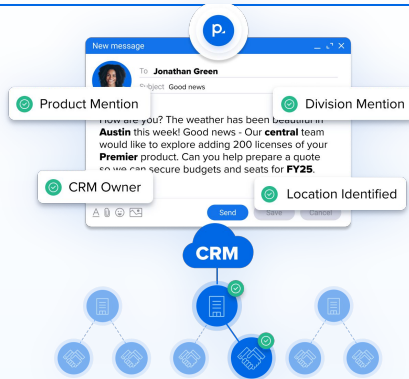


Protect employees' sensitive data with machine learning content filtering, ensuring personal emails, performance reviews, promotions, grants/equity, 401(k) statements, and more are never displayed in CRM

Data Foundation

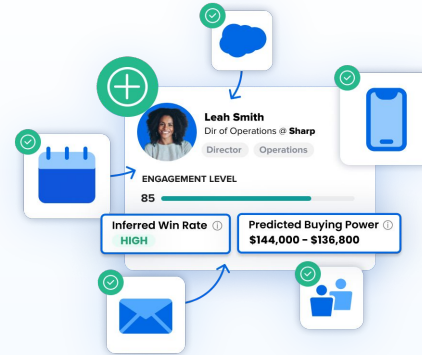
Ensure your go-to-market team is spending time with the right accounts and contacts known to get deals done

Score-Based Matching



- Accurately match activities to CRM Accounts, Opportunities, Contacts & Leads by evaluating each prospective Salesforce object
- Select the most relevant match using signals such as email domains, CRM object ownership, participating Contacts/OCR's, and activity text

Contact Creation & Enrichment

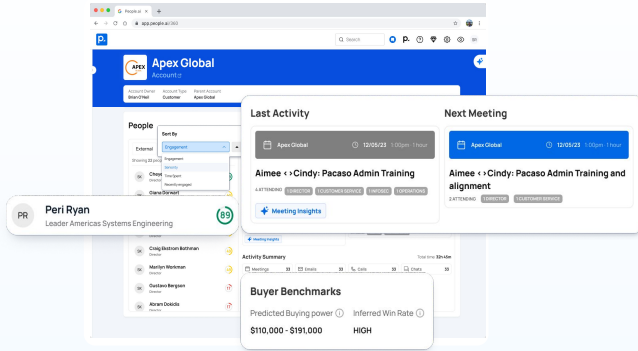


- Once engaged, create new contacts, continually enrich them with data such as name, email, title, phone, seniority, department, persona, engagement level, predicted buying power, and time spent

Data Foundation: Visualize

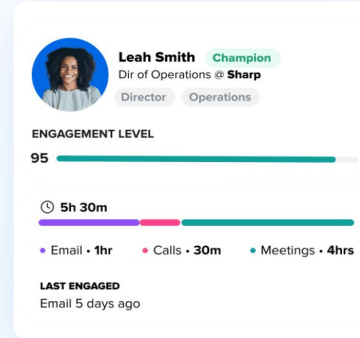
Visualize your complete story with ease & spend less time digging, more time derisking - directly inside your CRM

360 Views



Built on complete and accurate go-to-market data, 360 views allow you to **confirm you're multi-threaded**, **have executive sponsorship**, and are **allocating the time necessary to close a deal**

Engagement Levels



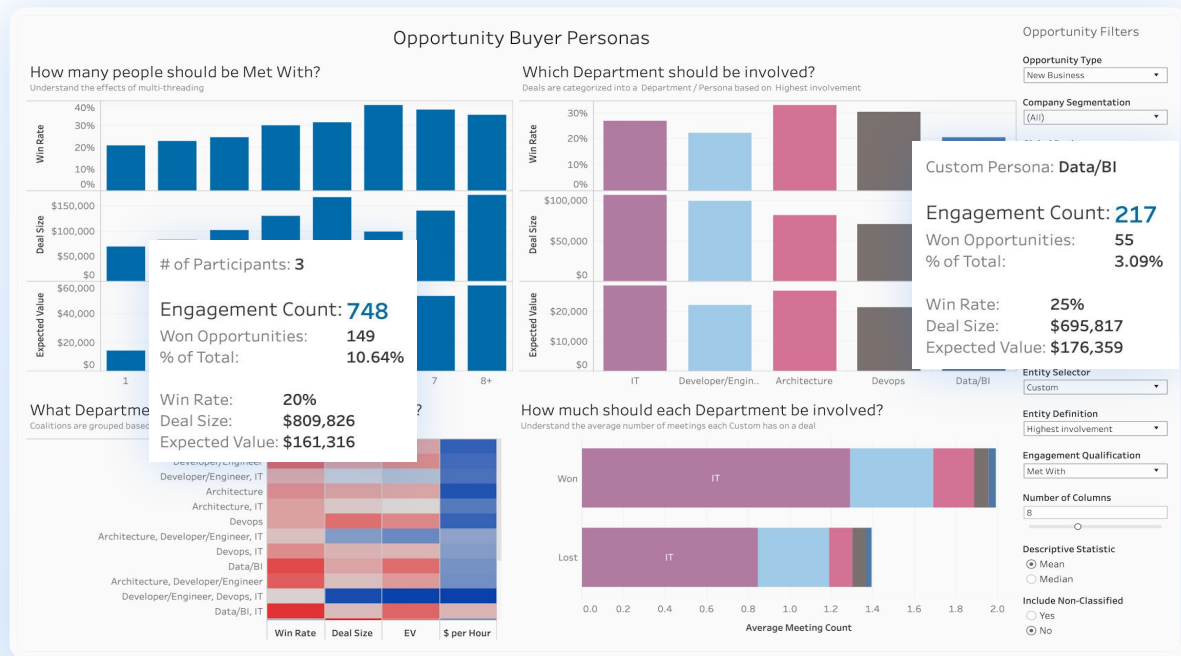
- Gain **complete visibility** into engagement across accounts, opportunities, contacts, and leads
- Dynamic engagement levels (0 – 100) allow you to **understand the health of your engagements**

Data Foundation

APIs

-Fuel your existing tools with complete, accurate, and enriched data through the use of Rest APIs

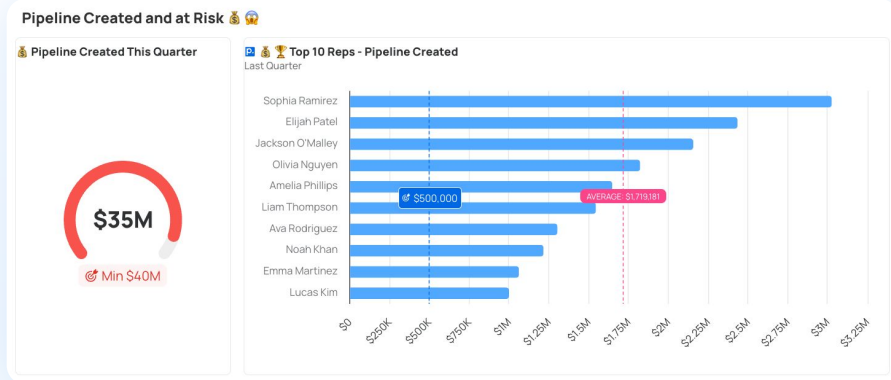
-Account, Opportunity, Team, Activity, and Engagement Level data is portable allowing you to make fast, effective decisions wherever your teams work



Data Foundation

Visualize your complete story with ease and gain actionable insights instantly

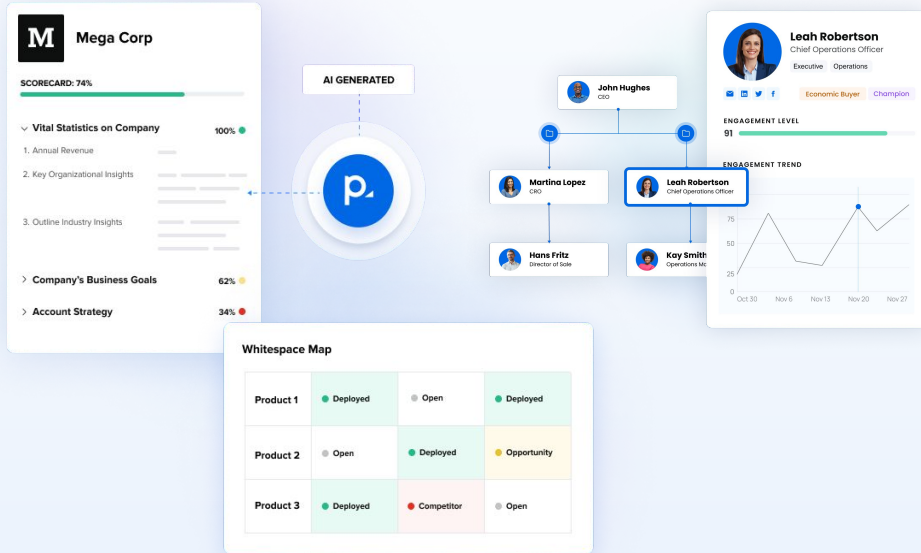
Engagement Dashboards



- Run your entire go-to-market team off the same data set with out-of-the-box, interactive boards and tables based on complete and accurate data
- Quickly uncover what's happening across Accounts, Opportunities, and team performance
- Create a culture of coaching by adding targets, visualizing trends, and leveraging custom metrics

ClosePlan

Operationalize your selling motion with ClosePlan



Better serve existing customers and enhance internal collaboration from pre to post-sale to renewal

Introduce a standardized selling motion with AI-powered account plans, opportunity scorecards, and relationship maps – directly in your CRM



Increase in win rate using sales methodology-specific scorecards

Create Repeatable Success with ClosePlan

Centralized Account Planning

Create a uniform approach to account planning and centralize it in Salesforce to promote internal collaboration and better serve your customers

Identify & act on Whitespace

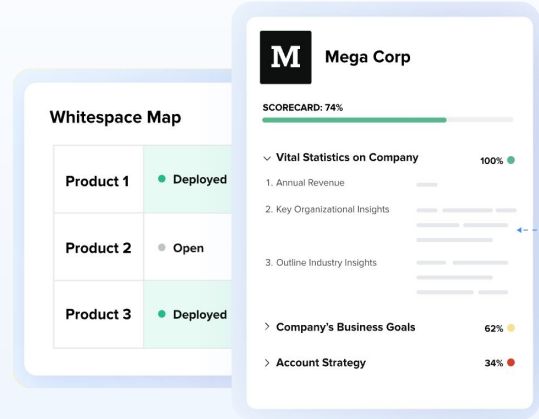
Easily spot opportunities for expansion and tie business initiatives to offerings with whitespace maps, ensuring you capture the complete TAM

Qualify deals with Opportunity Scorecards

Standardize the way you qualify opportunities against your methodology of choice, de-risking your pipeline

Understand who is who with Relationship Maps

Visualize your entire buyer group and plot your strategy to engage and upsell, strategically with those who hold the most influence



“People.ai empowered our sellers to approach their deals in a more strategic and methodical manner to close deals more efficiently.”

Clayton Dobbs
Senior Manager of Inside Sales
Unity

Account Scorecards

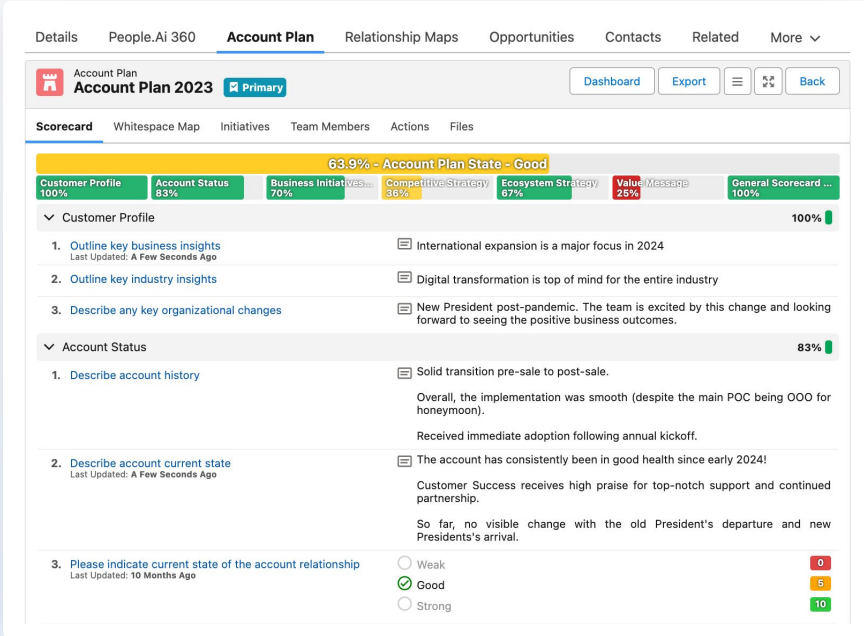


Collaboratively navigate complex sales cycles, upsells, and renewals with ease across pre- and post-sale teams

Provide complete visibility across your go-to-market team with Salesforce-native Account Scorecards

Keep pre- and post-sale teams aligned on customers' business goals, objectives, challenges, and more to best serve customers

Operate as strategic partners from creation to closure to renewal by validating customers' health, driving expansions, and boosting renewal rates from a single, unified view



Seismic

Increase in win rates when reps utilized account plans

Whitespace Maps



Visualize the most effective route to revenue

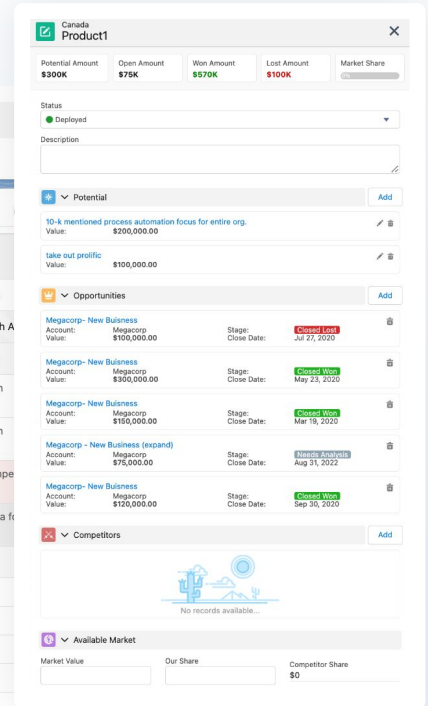
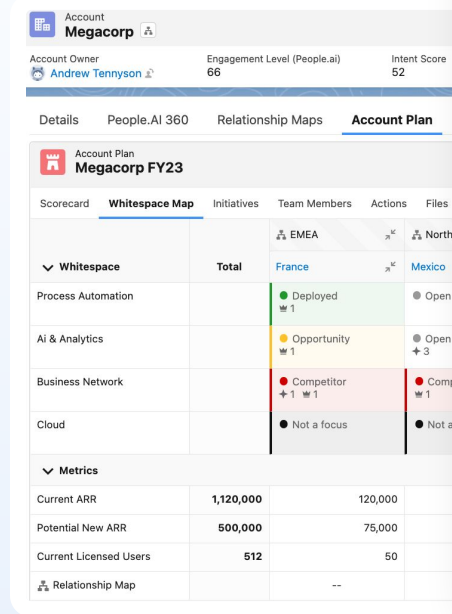
Remove friction and improve data accuracy by automating the completion of current spend, products purchased, number of seats, and business units deployed within existing accounts

Allows you to deeply understand where customers are deployed, where competitors have landed, the total addressable market, and more—native to Salesforce and full reportable

Plot your strategy to execute cross-sell and upsell motions with ease

“People.ai has also helped us identify which accounts and opportunities to prioritize and align with based on our customers’ structured growth.”

Clayton Dobbs
Senior Manager of Inside Sales, Unity



Opportunity Scorecards



Unify your deal qualification with standardized scorecards in Salesforce—collaborate, validate, and de-risk with full visibility

Leverage out-of-the-box templates or create custom scorecards to qualify deals in a uniform way, natively in Salesforce

Allow go-to-market team members to work collaboratively on deals inside their CRM. Empowers leaders to validate opportunity health against their proven sales framework or methodology

Fully reportable in Salesforce, PeopleGlass, and Engagement Dashboards, allowing you to identify gaps and act before it's too late

Opportunity
Zoom - New Business

Close Date: 7/29/2022 | Amount: 68 | People.ai Engagement Score: 69.90% | Scorecard Score: 69.90% | Playbook Score: 55.56%

Progress: Metrics (100%) → Economic Buyer (60%) → Decision Criteria (100%) → Decision Process (33%) → Paper Process (100%) → Identify Pain (63%) → Competition (50%) → Champion (60%) → Perception Analysis → Proposal/Price Qu

Details | People.AI 360 | **Scorecard** | Playbook | Relationship Maps | Contact Roles | Campaign Influence | Related

69.9% - Lower Risk

Metrics 100% | Economic Buyer 60% | Decision Criteria 100% | Decision Process 33% | Paper Process 100% | Identify Pain 63% | Competition 50% | Champion 60%

Metrics

- 1. METRICS – Quantifiable measurements and proof of business benefits
 - No understanding
 - Metrics understood and summarized
 - Metrics confirmed and signed off by key decision makers
- 2. Summarize the Metrics that define success of the project / initiative
 - 3 metrics were identified:**
 - Increase lead quality
 - Improve email match rate
 - Understand buyer intent

Economic Buyer 60%

- 1. ECONOMIC BUYER – The individual who is required for the final "yes"
 - Not identified
 - Economic Buyer identified
 - Alignment with Economic Buyer established
- 2. Identify Economic Buyer
 - 1 of 1 Contact(s) selected:
 - 61** Monica Bell
 - VP of Engineering
 - Zoom
 - bob.bell@bungiefoundation.com
 - 6211622875



21% increase in Win Rate using MEDDIC Scorecards



Playbooks



Utilize playbooks to create a repeatable and consistent sales motion across your entire sales team

Guide your sellers through your sales motion with easy-to-follow playbooks, from new business to renewal to upsell

Sellers are prompted to complete steps to properly qualify deals stage by stage, allowing you to reinforce your exit criteria, ensuring your forecast is reliable

Along the way, link best-in-class job aides and other reference material directly inside your CRM, keeping your sellers in the flow of work

The screenshot shows a CRM interface for a sales opportunity named 'Geba - New Business (Meddpic)'. The top navigation bar includes 'Details', 'SalesAI', 'Scorecard', 'Playbook', 'Relationship Maps', 'Contact Roles', and 'Campaign Influ'. The 'Playbook' section is active, showing a progress bar for 'Needs Analysis' at 50%. Below this, there are three stages of the sales process:

- Stage: Qualification (1)** - Progress: 100%. Task: 1 Discovery Call. Checklist: Identify Champion (100%), Discovery call completed, Follow up email, Create opportunity.
- Stage: Needs Analysis (2)** - Progress: 50%. Task: 1 Business Value Call. Checklist: Business value call completed (67%), Economic success criteria confirmed, Update Scorecard, Add Checklist Item.
- Stage: Needs Analysis (2)** - Progress: 67%. Task: 1 Technical Value Call. Checklist: Technical value call completed (67%), POC Success Criteria confirmed, Schedule & run internal prep call prior to Technical Value..., Add Checklist Item.

"With People.ai, we've removed the guesswork from our sales process and set our sellers up for success."

Esther Friend
VP of Sales Efficiency & Transformation
Five9

Relationship Maps



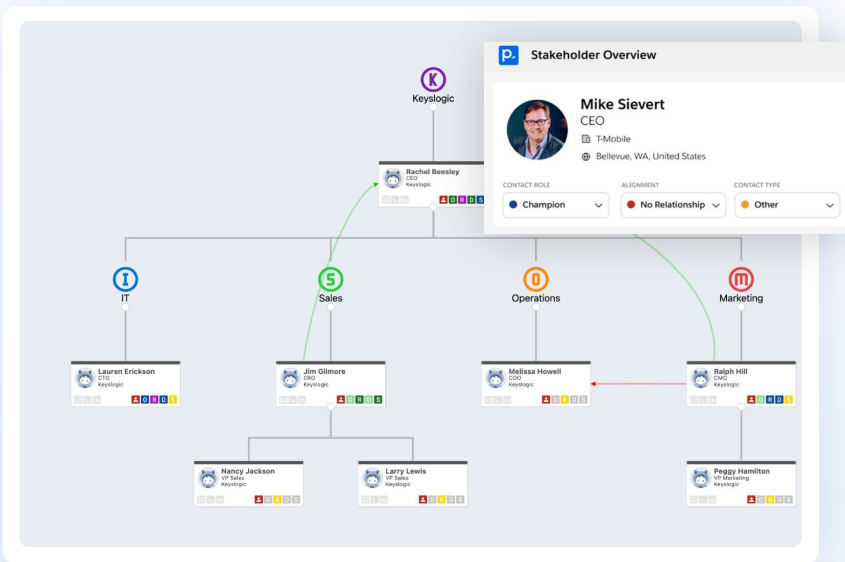
Leverage org charts to create a winning engagement strategy and better serve customers and prospects

Manage your relationships with Salesforce-native organizational charts

Add contacts directly from Salesforce to your map to keep up-to-date.

Deeply understand the roles each stakeholder plays within the account or opportunity including their engagement level, support status, inferred win rate, predicted purchasing power, and visualize any positive or negative relationships that have been identified.

From there, identify missing personas or engagement gaps and plot your strategy to engage with those most likely to close a deal. Continue to leverage these strategies to ensure product adoption and stickiness at renewal.



"My goal is to help our sellers be more effective in their role, and we brought in People.ai to help us get there."

Connor McCaffrey
Director of Revenue Operations, Acceldata



Automated Relationship Maps

Leverage AI to create a winning engagement strategy and better serve customers & prospects

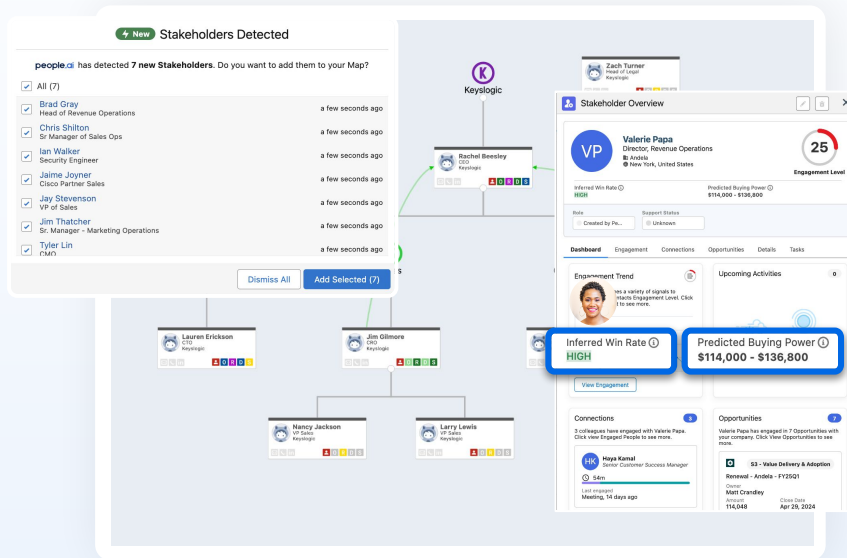
Manage your relationships with Salesforce-native organizational charts:

AI detects newly engaged contacts and automatically prompts you to add them to your map, ensuring it's always up-to-date

Understand the roles each stakeholder plays and access insights including engagement level, support status, inferred win rate, and predicted purchasing power

Identify missing personas or engagement gaps and plot your strategy to engage with those most likely to close a deal. Continue to leverage these strategies to ensure product adoption and stickiness at renewal

Visualize any positive or negative relationships that have been identified



30% Decrease in sales cycle length for strategic upsells

SalesAI

Experience the SalesAI advantage & supercharge growth

The screenshot displays the SalesAI Assistant interface. On the left, a deal summary for 'Apex Global - New Business' is shown. The deal is owned by Lindsey Stanton, closed on Aug 4, 2023, with an amount of \$975,000. It is currently in Stage 5 - Awaiting signature. The summary is divided into three sections: Key Topics, Next Steps, and Blockers. Key Topics include recent interactions with participants like Kaylynn Battista, Skylar Botosh, Kadin Vaccaro, Davis Aminoff, and Ryan Saris. Next Steps include organizing a legal call, scheduling time with Erin Westervelt, and reviewing contracts. Blockers include pending risk assessment, code review in progress, and compliance verification requirements. On the right, the SalesAI Assistant chat window is open, asking 'What would you like to know about this deal?' and offering buttons for 'What's the latest on this deal?', 'What are the key risks?', and 'Evaluate this deal using MEDDPIC'. A search bar at the bottom of the chat asks 'How is my deal doing?'.

Revolutionize the way you approach revenue, team structure and coaching, and go-to-market execution

Uncover hidden truths about deals and answer your most difficult revenue questions with a data-first approach



“SalesAI saves me time to focus more on external facing customers. These are tasks that HAVE to get done to drive revenue for the business.”

Account Executive
Hexagon

Unlock Success with the SalesAI advantage

Deal Summaries reveal what's really going on

Access generative AI summaries to understand what's happening across Accounts and Opportunities in seconds - including key topics, next steps, and potential risks

SalesAI Assistant tightens deal execution at scale

Inspect Accounts and Opportunities 24/7 with your own SalesAI Assistant, powered by complete and accurate go-to-market data so you continuously and proactively identify risk and take a prescriptive approach to coaching

Revenue answers based on uniform data, where you work

Work off complete, uniform data in your tool of choice with access to our open API and off-the-shelf AI assistant

Join customers like:



3 Deals at Risk

- Apex Global (**\$855k at risk**)
- Mexa Wave (**\$1.6M at risk**)
- Quantum Build (**\$1.25M at risk**)

[See Risk Breakdown](#)



Hi Anna 🙌 I'm your friendly AI-powered sales coaching assistant, Gathering insights for you right now.

Identify deal risks

Coach my rep

Evaluate using MEDDPIC

Provide a deal summary

Account & Deal Summaries



Instantly access the current state of every account and opportunity—completely friction-free

Generative AI summaries provide a snapshot of each Account and Opportunities' current state, including key topics discussed, next steps, and potential risks based on complete history (calls, emails, meetings, chat transcripts, etc.)

Access inside your CRM, improving and accelerating your ability to prepare for internal and external meetings



Gartner
Improvement in productivity according to a Generative AI 2024 Planning survey

The screenshot shows a CRM interface for 'Apex Global' with a 95% engagement score. It features three summary cards: 'Key Topics' (discussing software integration and ROI), 'Next Steps' (listing actions for Will Torres), and 'Blockers' (highlighting transition leadership). Below is an 'Engagement Metrics' section with a table of meetings and a chart of activities by day.

Category	Count	Time Period
Meetings	2	from 30 days ago
Meetings with a Director	1	from 30 days ago

Time period: Last 30 days

SalesAI Assistant



Answer your most difficult revenue questions in seconds

Access configurable, role specific prompts or ask additional open-ended questions (e.g., risk, methodology specifics, deal qualification, coaching recommendations, content creation, etc.) on Accounts and Opportunities.

Improve your SalesAI Assistants responses by training your Assistant on your sales motion, stage qualifications, enablement materials, competitors, etc.

Generative AI tools are only as valuable as the data that feeds them. SalesAI is built and trained on a trifecta of activity data, buyer insights, and your business context.



Gartner
Increase in revenue according to a Generative AI 2024 Planning survey

SalesAI Assistant
Data sourced from the last 30 days of activity

What would you like to know about this deal?

- Coach my rep
- Catch me up on this deal**
- What are the key risks

SalesAI Assistant
Data sourced from the last 30 days of activity

Tell me about this deal. Prioritize events that have happened most recently and address any next steps.

P. SalesAI Assistant

The opportunity with Apex Global is in **Stage 2 - Business Validation** and is expected to close on **February 28, 2024**. The deal is valued at **\$500,000** and is categorized as **Pipeline** in the forecast.

Recent events:

- The last update in the CRM was on **February 11, 2024**.
- Zach Stone**, the Chief Data Analytics Officer, was the most recently engaged external stakeholder on **February 12, 2024**.
- Will Torres**, the Strategic Account Executive, is the most engaged internal team member, also last engaged on **February 12, 2024**.

Next steps:

- A meeting with **Greg Berry** and **Zach** is scheduled for later this week with the goal to have all legal workstreams back in Apex Global's hands or completed by then. Pricing will also be presented to Zach during this meeting.
- The procurement and legal teams are working to finalize the Master Service Agreement (MSA) and complete the Data Processing Agreement (DPA) and privacy security approval before launching the pilot.

Automated Account Plans



Effortless account research to accelerate growth

Automate your account plan research and eliminate manual data entry with *Automated Account Plans*.

With a single click, safely and securely leverage the power of LLMs and generative AI through People.ai's LLM gateway, ensuring that your data and your customers' data remain confidential.

Answers are quickly returned and ready for review, freeing up time for strategic planning and outreach, enabling go-to-market teams to drive expansions and boost renewals.



Gartner
Improvement in productivity
according to a Generative AI
2024 Planning survey

Automated Opportunity Scorecards



On-demand coaching enhances deal qualification and mitigates risks

Improve deal qualification and mitigate risks with *Automated Opportunity Scorecards*

AI auto-completes scorecard questions based on the complete deal history, evaluates the completeness (0 - 100%), and assesses the quality of your sellers' scorecard answers (high or low) based on your sales methodology fundamentals

Coach sellers on how to improve their responses using methodologies and customer examples, enabling leaders to confidently call their numbers for the month or quarter



Gartner

Cost savings according to a Generative AI 2024 Planning survey

My Opportunities
Created by Henry Fehrenbratt on Apr 3, 2024 at 11:36AM

Opportunity	Close Date	Stage
Epsilon: Land & Expand Deal	Sep 19, 2024	DECISION MAKERS
Renewal - Apex Tech	Jul 16, 2025	PROSPECTING
Infinity Sales Expansion	Jan 7, 2024	VALUE PROPOSITION
Insight Cross-Sell	Nov 12, 2024	PERCEPTION ANALYSIS
Luminous Foundation Close	Jul 11, 2024	PROSPECTING
Blaze9 Expand Deal	Jul 15, 2024	DECISION MAKERS
Renewal: TechWise Solu...	May 20, 2025	PROSPECTING
NextGen Industries Expand...	Sep 25, 2024	VALUE PROPOSITION
New Business - Paradigm In...	Jun 10, 2025	PERCEPTION ANALYSIS
Unity Tech Sales Expansion	Nov 4, 2024	QUALIFICATION
Fossa Cross-Sell	Sep 3, 2024	VALUE PROPOSITION
Omega Solutions Close	Aug 27, 2025	QUALIFICATION
Hyperion Innovations Expa...	Sep 12, 2024	DECISION MAKERS
Xenon Systems Cross-Sell	May 3, 2024	PERCEPTION ANALYSIS
Renewal: Digital Dynamics	Jun 27, 2025	QUALIFICATION
Stellar Solutions Close	Nov 23, 2024	VALUE PROPOSITION
Sales Expansion: TitanTech	Jan 28, 2025	QUALIFICATION

Apex Tech Scorecard
Renewal - Apex Tech Opportunity **SALES AI ENABLED** Overall Completion: **62%**
Last Updated 4 hrs Ago

Metric Answer Quality: **LOW** Completion: **100%**

1. What type of metric defines success of the project?

ANSWER:

Success will be quantifiable through:

- Improvement in revenue growth in the payments segment.
- Increased adoption rates and enhanced reporting capabilities, addressing the technical pain points with the current tool.

Answer Assist

This is what I think is missing in your answer:

I found 2 meetings mentioning the metrics you were referring to in your answer. I suggest adding some data to your answer. It appears that Mark Hawkins mentioned \$150,000 in regards to revenue growth in an email on 6/24/2024.

51 SOURCES SEARCHED | Calls 33 | Emails 12 | Events 5 | Other databases 1

Notes

Type here...

Economic Buyer Answer Quality: **LOW** Completion: **100%**

Decision Criteria Answer Quality: **0%** Completion: **0%**

Decision Process Answer Quality: **0%** Completion: **0%**

Paper Process Answer Quality: **HIGH** Completion: **100%**

Identify Pain Answer Quality: **LOW** Completion: **100%**

Coming soon!

PeopleGlass

Winning revenue teams start their day with PeopleGlass

My Opportunity

Name	Stage	Amount
LATAM Data Cloud	Qualification	\$1,200,000
Big Data Project	Scoping	\$850,000
APAC Data Cloud	New	\$585,000
Spotfire Analytics	Qualification	\$1,500,000
Data Security	Negotiation	\$750,000

STAGE

New

My Opportunity

Name	Stage
LATAM Data Cloud	Qualification
Big Data Project	Scoping
APAC Data Cloud	New
Spotfire Analytics	Qualification
Data Security	Negotiation

MEDDPIC

76%

80%

50%

90%

90%

90%

60%

Engagement Level

98

75

33

100

24

64

72

My Opportunity

Name	Stage	Amount
LATAM Data Cloud	Qualification	\$1,200,000
Big Data Project	Scoping	\$850,000
APAC Data Cloud	New	\$585,000
Spotfire Analytics	Qualification	\$1,500,000
Data Security	Negotiation	\$750,000

JD Jane Doe
4:30PM Today

Having a call with them tomorrow AM.

Reply...

The fastest way to update Salesforce

Unlock new levels of productivity and drastically speed up workflows by accessing a single, streamlined view of every account, opportunity, and contact



"Thanks to People.ai, now there are more educated and informed discussions between sales leaders and reps about the opportunities they're working on, insights into deal health, and the engagement within that account."

Terry Bird
VP, Sales Enablement, Vonage

Accelerate CRM productivity with PeopleGlass

My Opportunity

Name	Stage	Amount	Owner
LATAM Data Cloud	Qualification	\$1,200,000	Sam Smith
Big Data Project	Scoping		
APAC Data Cloud	New		
Spotfire Analytics	Qualification		
Data Security	Negotiation	\$750,000	Hallie Lue

JD Jane Doe
4:30PM Today

Having a call with them tomorrow AM.

Reply...

Pipeline transparency & better deal qualification

Access custom views that offer visibility into field activities, track KPIs, easily spot trends and changes, enhance collaboration, and quickly qualify deals according to your chosen sales methodology, inspiring timely action when needed

Productivity unleashed

Easily manage all your accounts, opportunities, and contacts from a single view. Make updates in bulk, automatically syncing them to Salesforce, freeing up more time for selling and strategizing

Scalability & improved Salesforce hygiene

Develop scalable processes for account, contact, and opportunity management, and facilitate effortless collaboration across teams by providing visibility and an easy solution for making Salesforce updates



"I'm all about anything that can save us a few clicks and a little bit of time. That's exactly what we have with PeopleGlass and the implementation of our MEDDPIC Scorecard."

Kiefer Krell
Strategic Account Manager, Cisco

Appendix

CRM 1

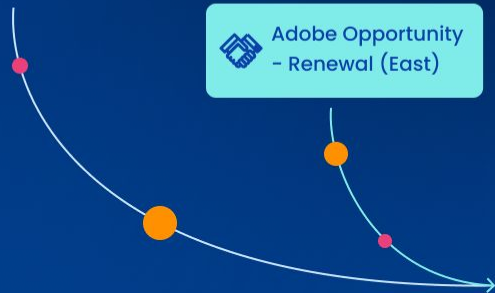
Adobe Account

Adobe Opportunity
- New Business (West)

CRM 2

Adobe Account Inc

Adobe Opportunity
- Renewal (East)



Halfway to Target

Missing Key Executive

Below Target

CRM Connect: *Complete Visibility* into Multiple CRM's

Multi Org Accounts										
Created by amelia demo on Nov 16, 2022 at 12:28 pm										
Account Group	Account	Your Organization	Account Owner	Account Engagement Level	# of Open Opportunities	Upcoming Meetings	Executives Engaged			
Adobe Inc	Adobe	Crm 1	AT Adam Torres	100	2	1	1			
Adobe Inc	Adobe	Crm 2	KY Kyle Young	25	1	0	0			
Cisco Systems, Inc.	Cisco	Crm 2	LL Lucie Lopez	80	0	1	0			
Cisco Systems, Inc.	Cisco	Crm 2	JB Jean Bates	25	1	0	0			
Cisco Systems, Inc.	Cisco	Crm 1	AT Adam Torres	100	2	0	1			
Edwards Lifesciences Corp	Edwards Lifesciences Corp.	Crm 2	RM Roberta McCoy	90	1	0	0			
Edwards Lifesciences Corporation	Edwards Lifesciences Corporation	Crm 1	MW Maeve Wong	80	1	2	0			
Google	Google	Crm 2	LC Lucie Cook	5	3	0	0			
Google	Google	Crm 1	AT Adam Torres	35	0	0	0			
24 Total (11 Groups)				Summary	59.2	average	1	average	0	average