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

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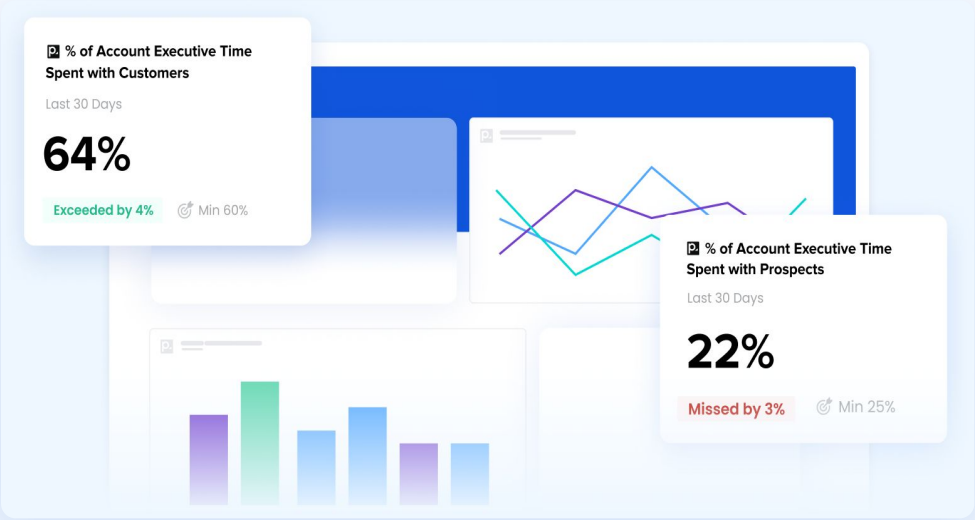
Data Foundation

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

25% Increase in new business meetings

HEXAGON

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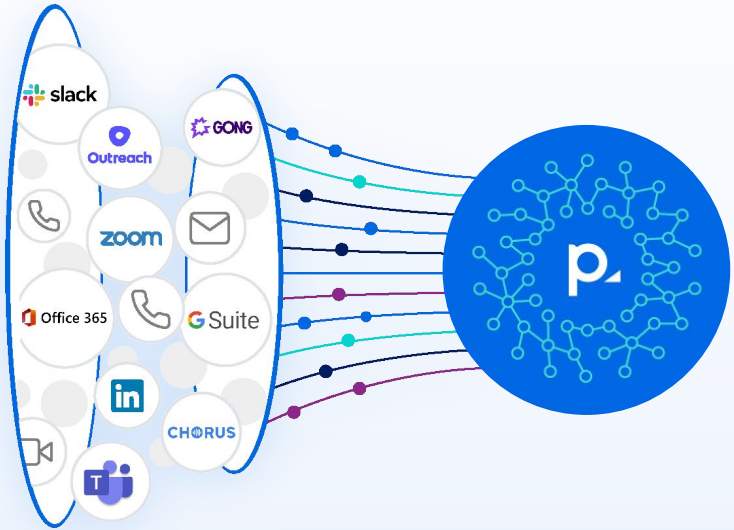
Access complete, enriched data for go-to-market transformation



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

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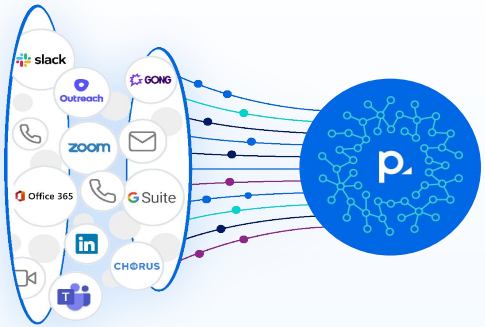
Data Foundation

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

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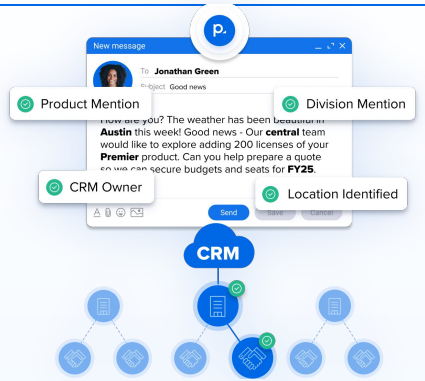
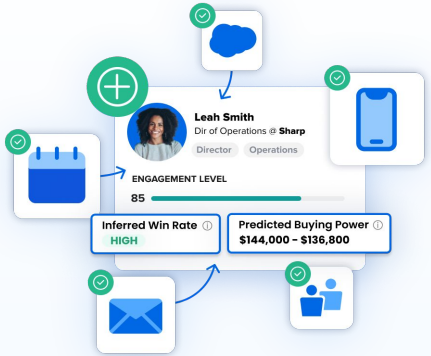
Ensure your go-to-market team is spending time with the right accounts and contacts known to get deals done

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

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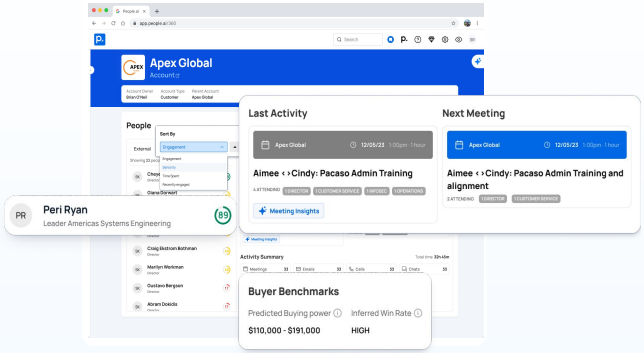
Data Foundation: Visualize

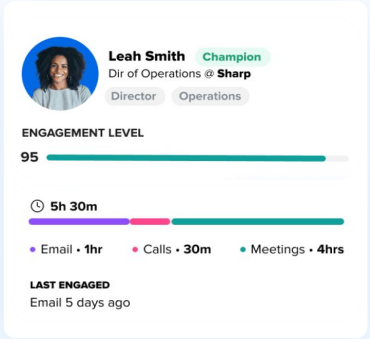
Visualize your complete story with ease & spend less time digging, more time derisking - directly inside your CRM

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**

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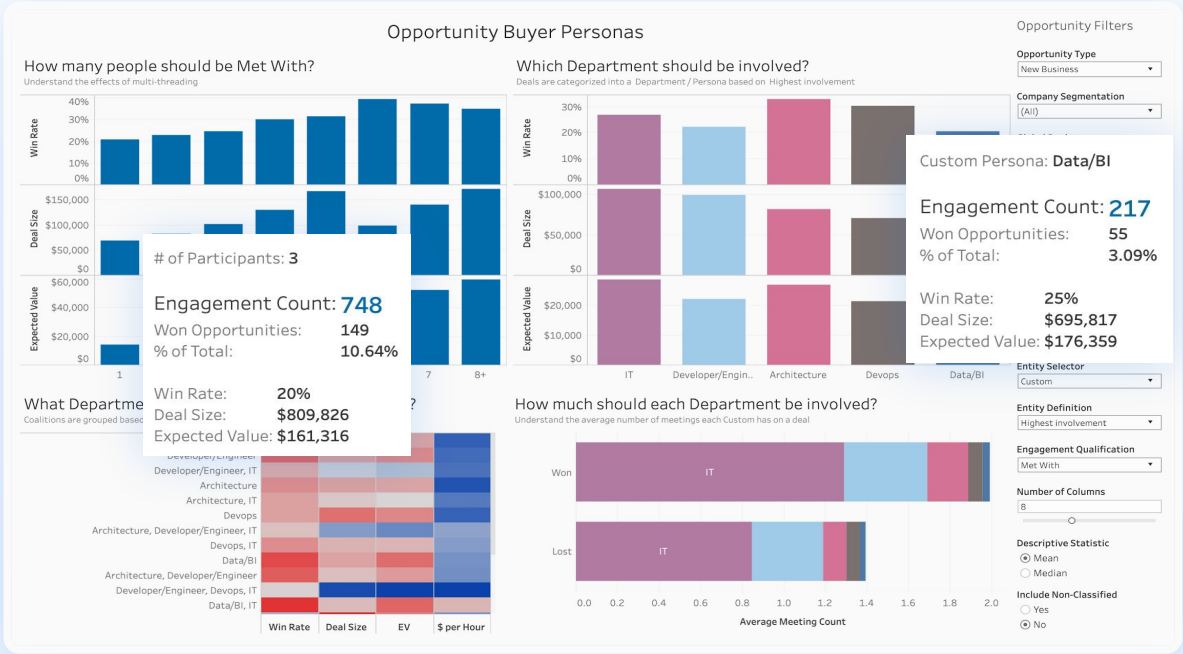
APIs

-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



Microsoft Dynamics 365 · salesforce · ORACLE · snowflake · Power BI · +ableau · Gainsight · HubSpot Marketing Hub

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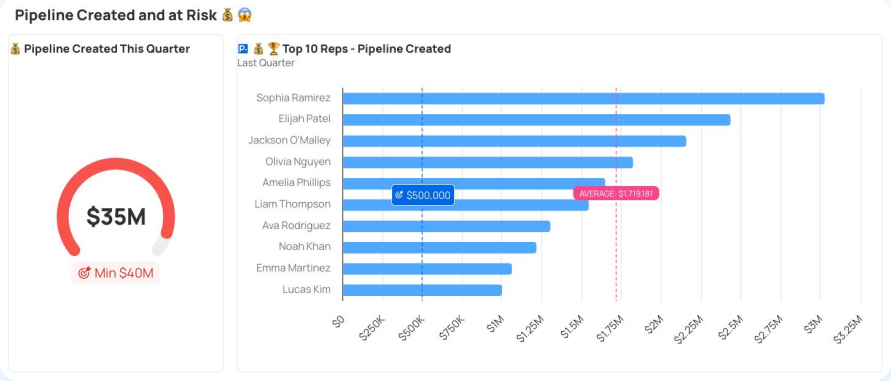
Visualize your complete story with ease and gain actionable insights instantly

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

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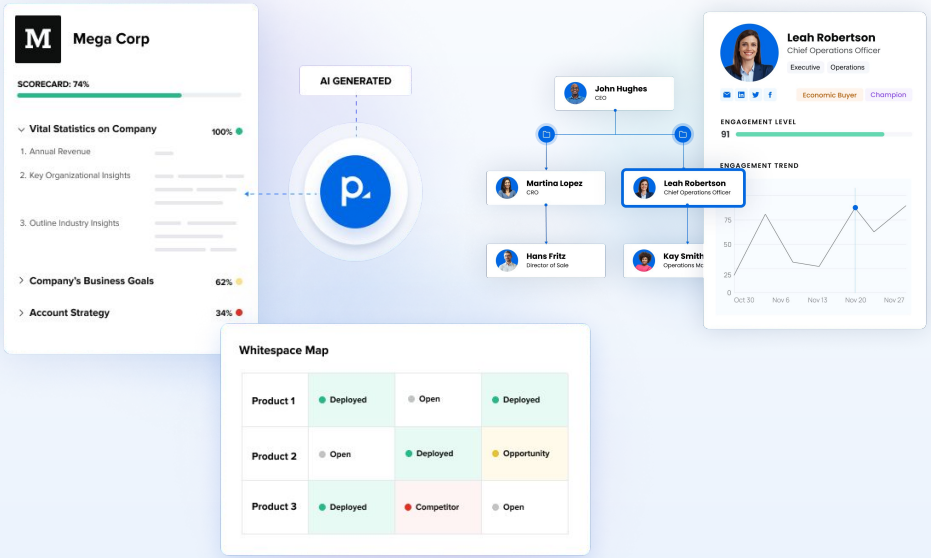
ClosePlan

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

CISCO

Increase in win rate using sales methodology-specific scorecards

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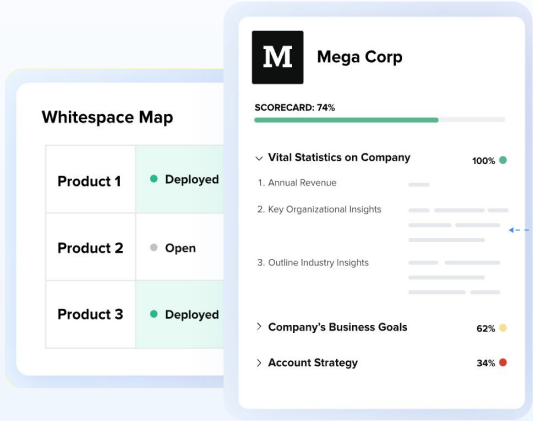
Create Repeatable Success with ClosePlan

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

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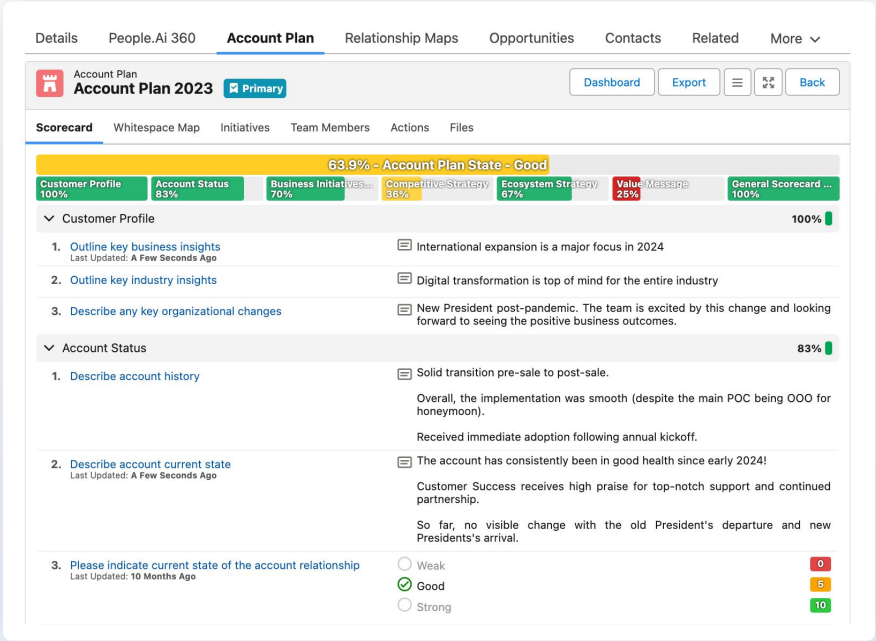
ClosePlan

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

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ClosePlan

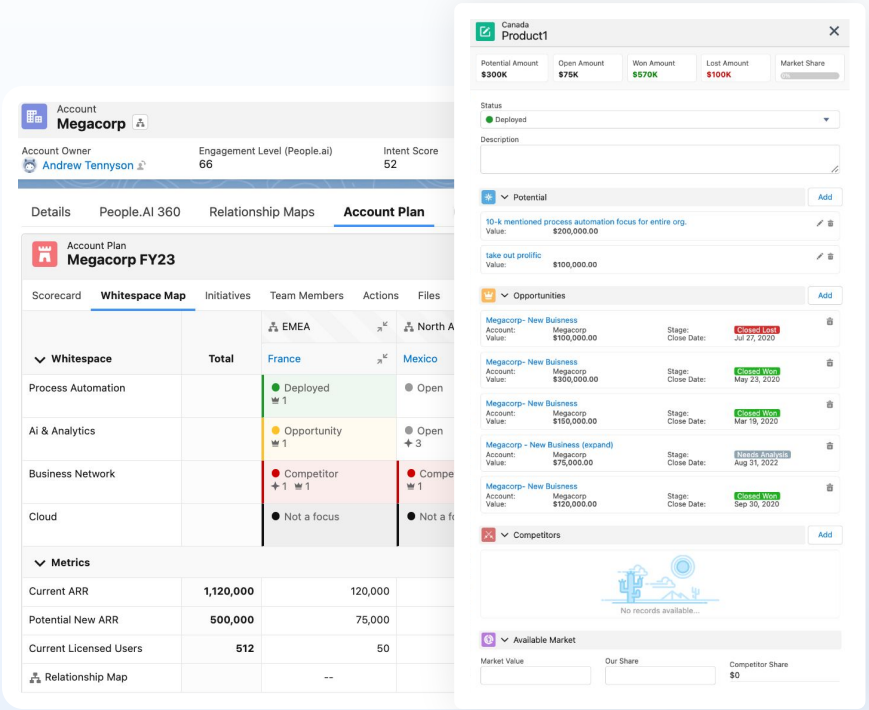
Whitespace Maps

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

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ClosePlan

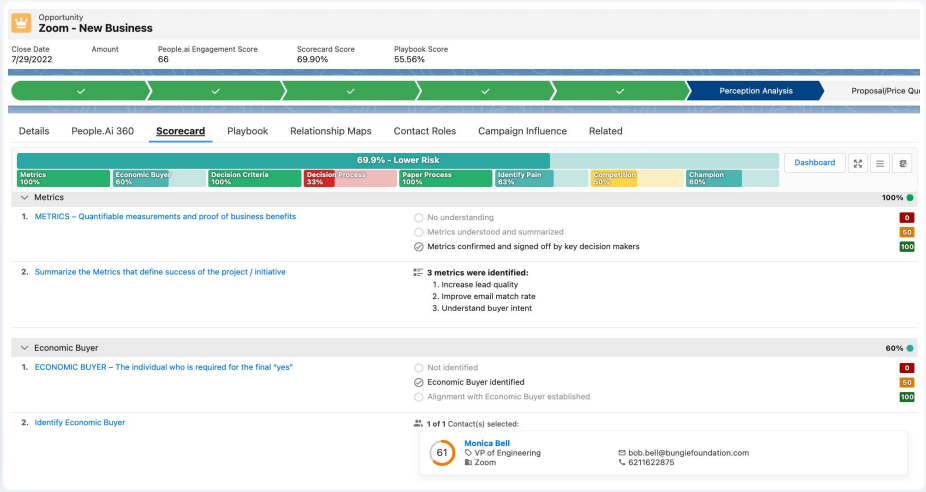
Opportunity Scorecards

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



CISCO

21% increase in Win Rate using MEDDIC Scorecards

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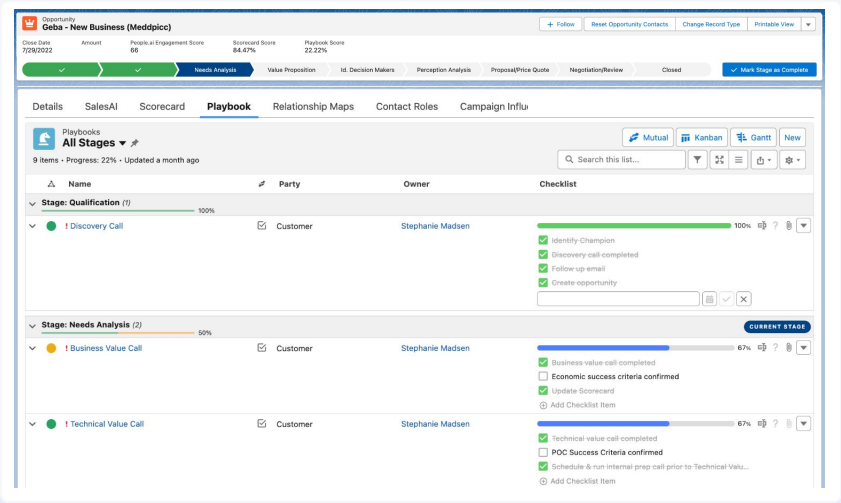

Playbooks

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

"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

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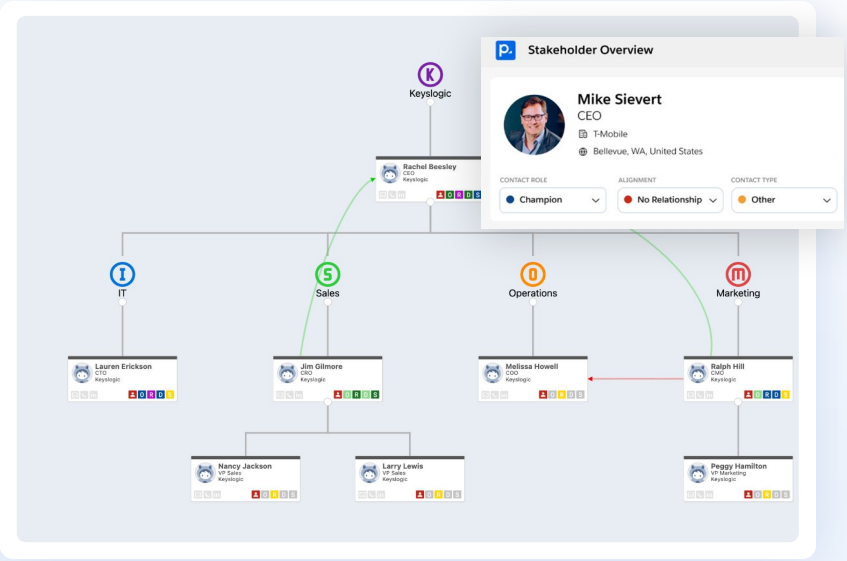

Relationship Maps

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

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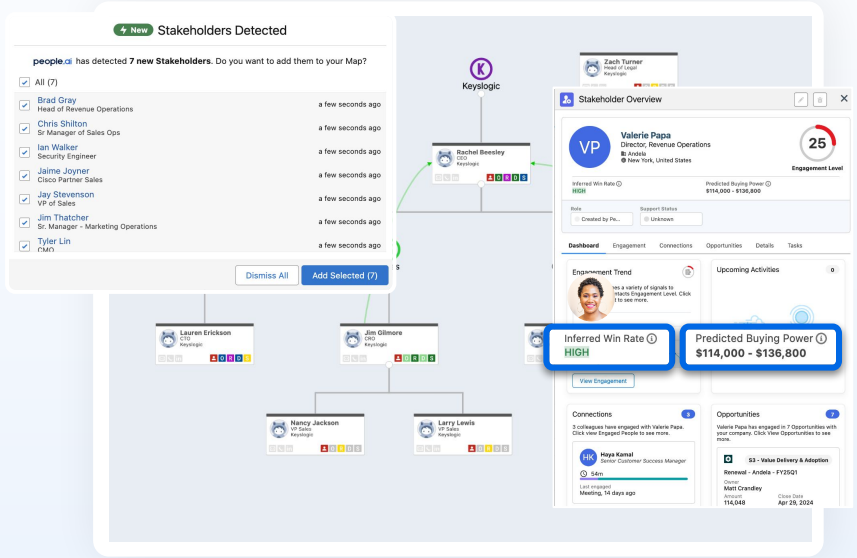
Data Foundation
+ClosePlan

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%

Unity

Decrease in sales cycle length for strategic upsells

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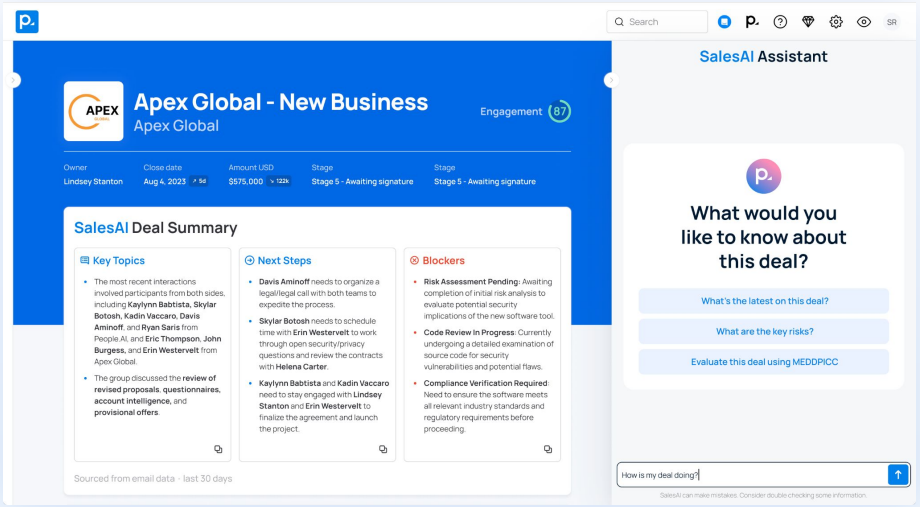
SalesAI

Experience the SalesAI advantage & supercharge growth



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

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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

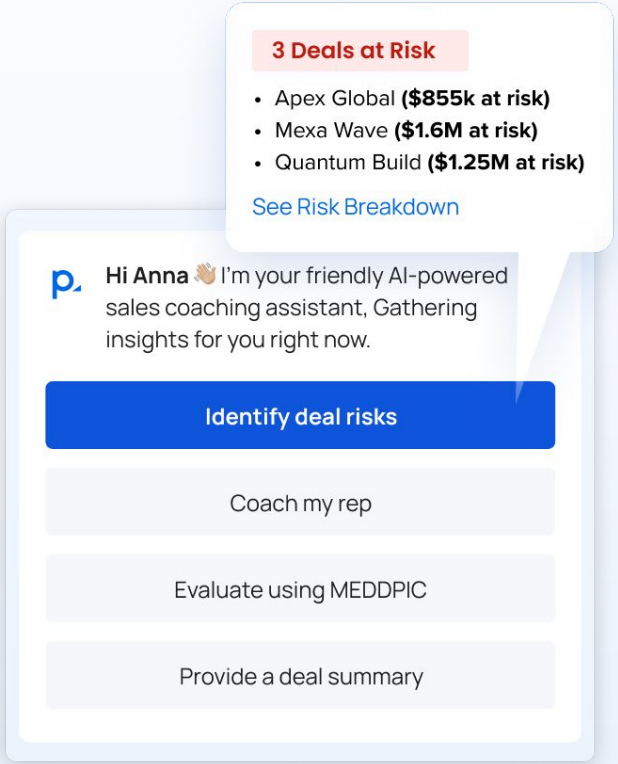
Inspect Accounts and Opportunities 24/7 with your own SalesAI Assistant, powered by complete and accurate go-to-market data so you continuously and proactively identify risk and take a prescriptive approach to coaching

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:

IBM HEXAGON IRON MOUNTAIN® DOMINO



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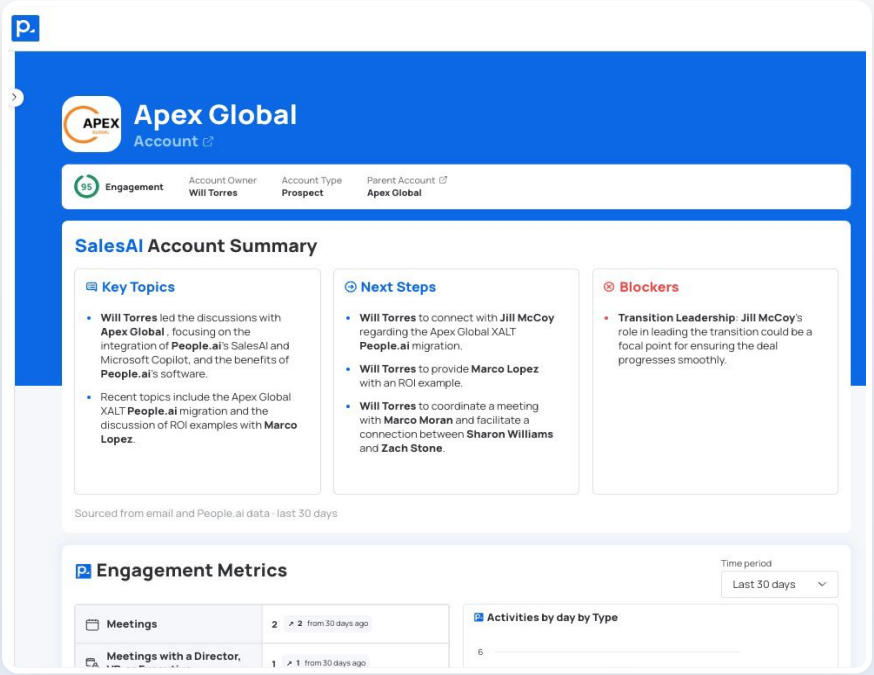

Account & Deal Summaries

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

22%

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

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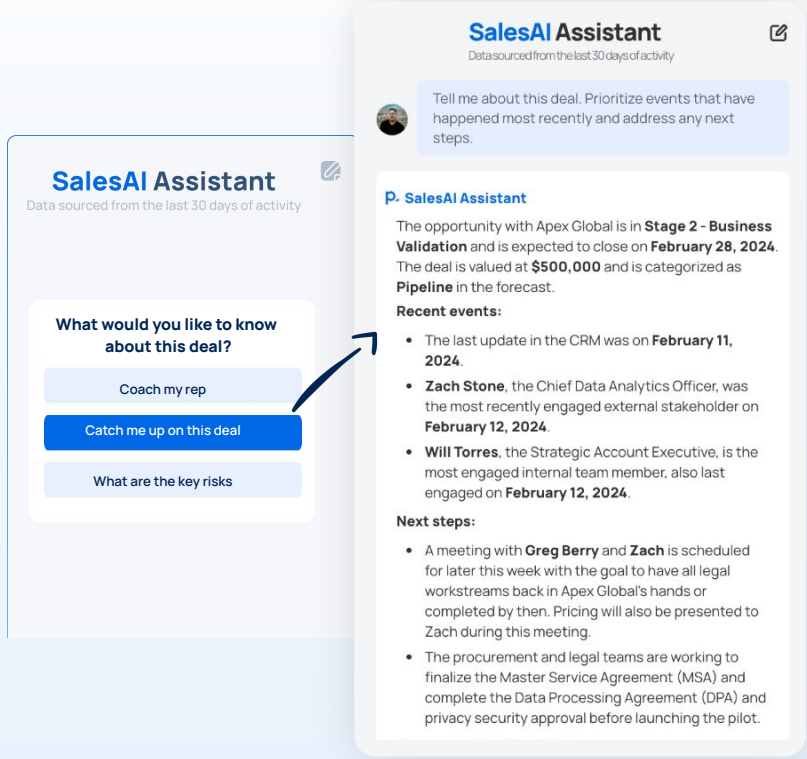
SalesAI Assistant

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

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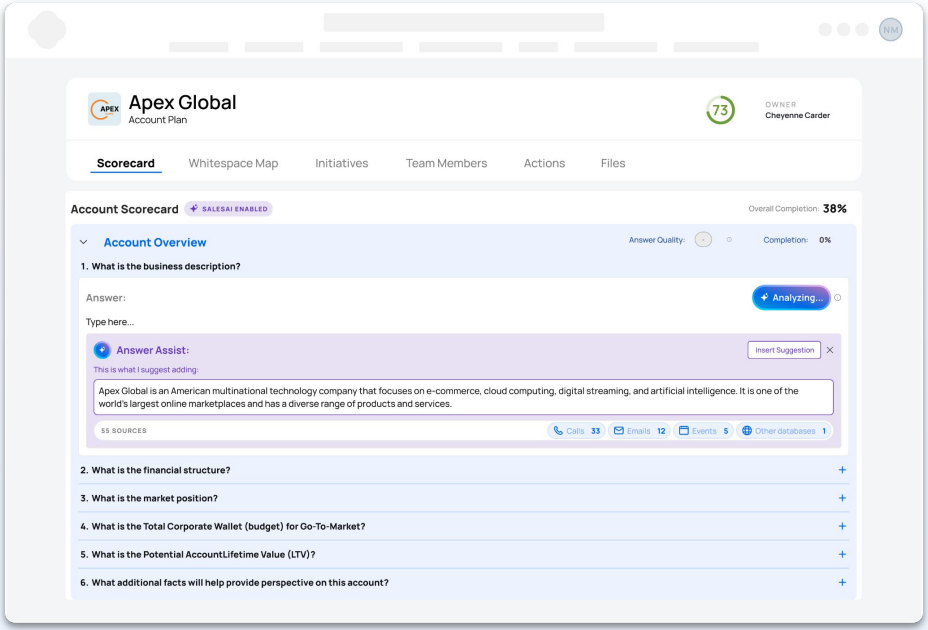
Data Foundation, ClosePlan, PeopleGlass, & SalesAI



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.

22%

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

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Automated Opportunity Scorecards

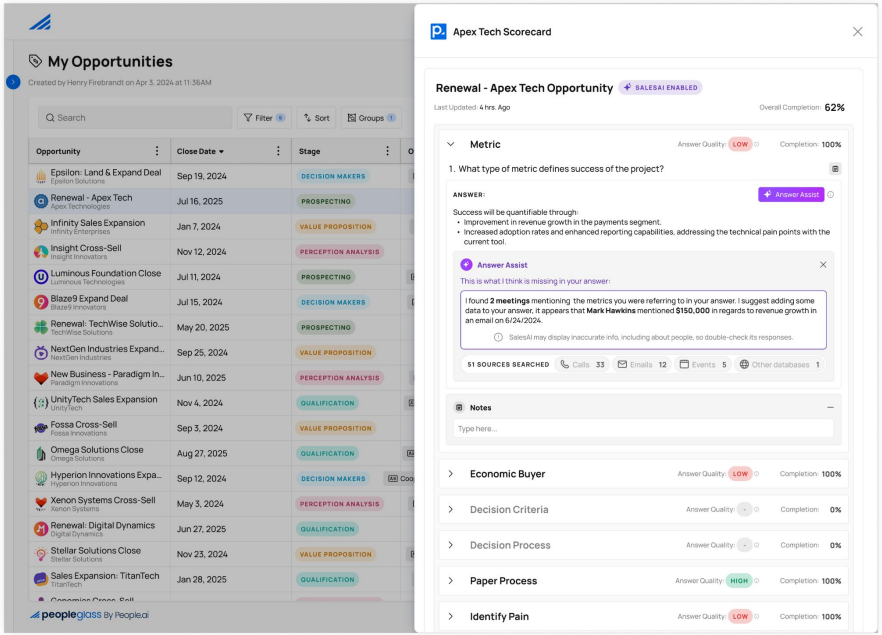
On-demand coaching enhances deal qualification and mitigates risks

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



Coming soon!

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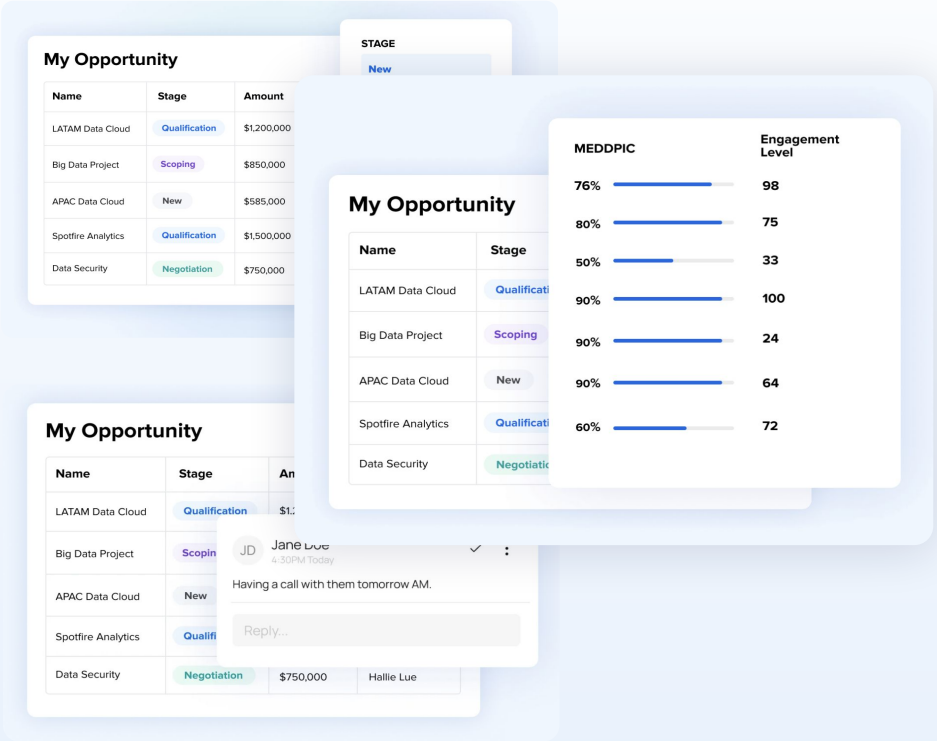
PeopleGlass

Winning revenue teams start their day with PeopleGlass



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

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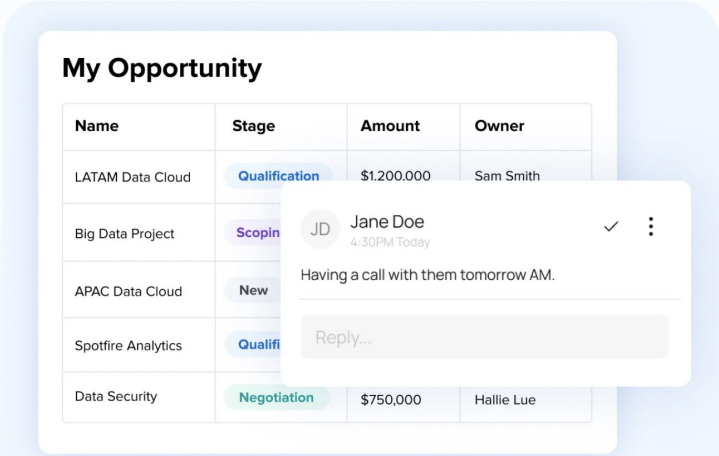
Accelerate CRM productivity with PeopleGlass



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 MEDDPICC Scorecard."

Kiefer Krell
Strategic Account Manager,Cisco

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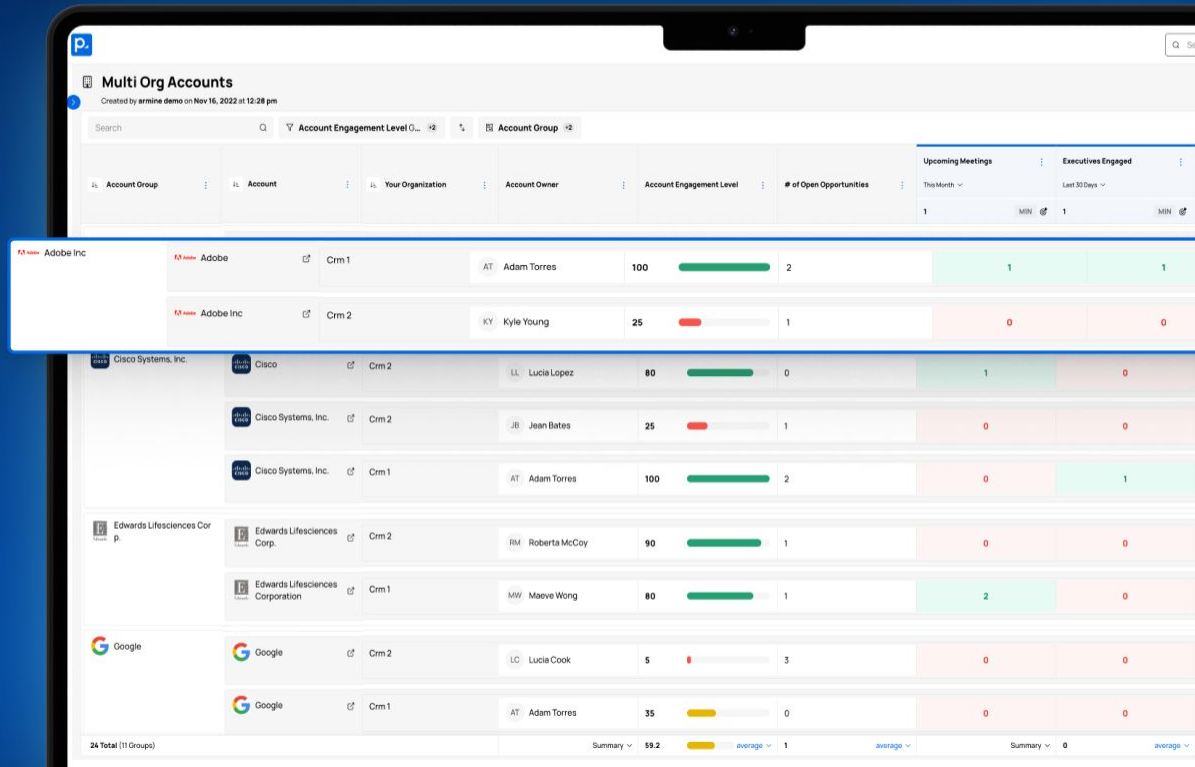
Appendix

CRM Connect:

Complete Visibility into Multiple CRM's

Halfway to Target

Missing Key Executive

Below Target