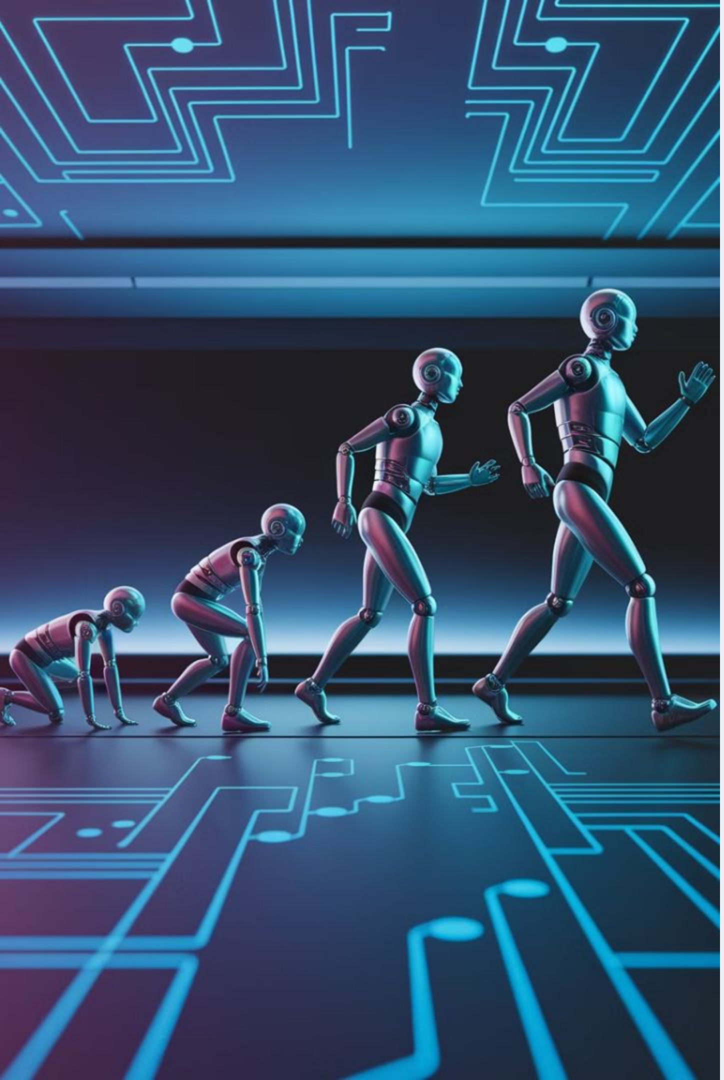


The Evolution of Artificial Intelligence (AI) in Go-To-Market

Kevin Williams & Adam Jay

The Old Way: Disconnected Sellers

Just two years ago, this was the daily reality...

1

Morning Routine

- Hours spent manually scrolling through LinkedIn Sales Navigator
- Downloading prospect lists into spreadsheets
- Manually sorting to determine ICP
- Painstakingly uploading them into our Sales Engagement Platform
- It was mind-numbing

2

Outreach Struggles

- It was common to copy and paste the same template to everyone
- Response rates were awful (sub 3%)
- Too much time to personalize hundreds of emails

3

Follow-up Chaos

- Desks covered in Post-it notes
- CRM updates days/weeks behind if done at all at the Missed follow-ups
- Lack of consistency

The Old Way: Chaos for Leaders

Before AI tools, sales leaders struggled to effectively manage and scale their teams due to lack of standardization and data-driven insights.

Inconsistent Performance

With each rep following their own playbook, it was impossible to identify and replicate successful strategies. This created unpredictable results and inconsistent sales practices.

No Visibility

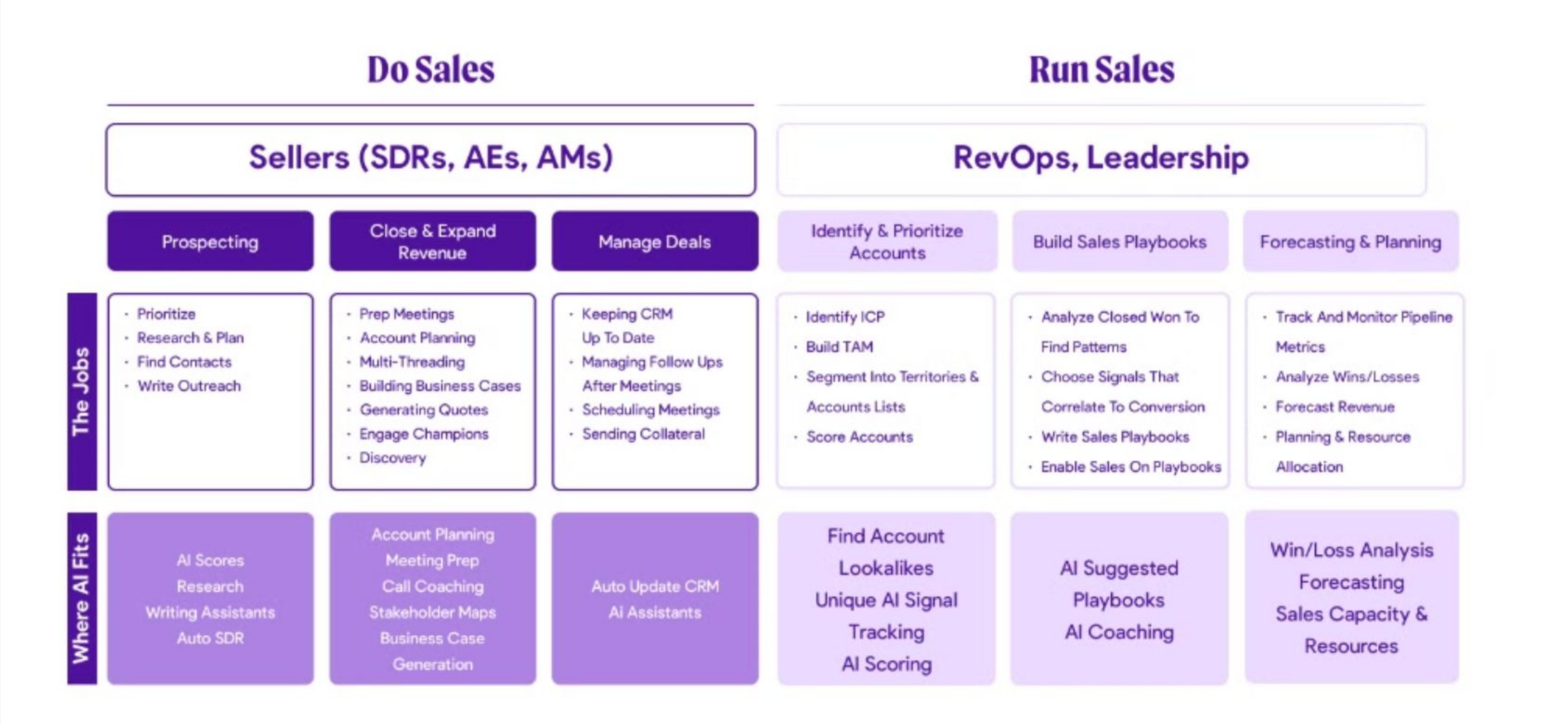
Performance data was scattered or missing entirely. Leaders couldn't track key metrics, forecast accurately, or understand pipeline health in real-time.

Coaching Challenges

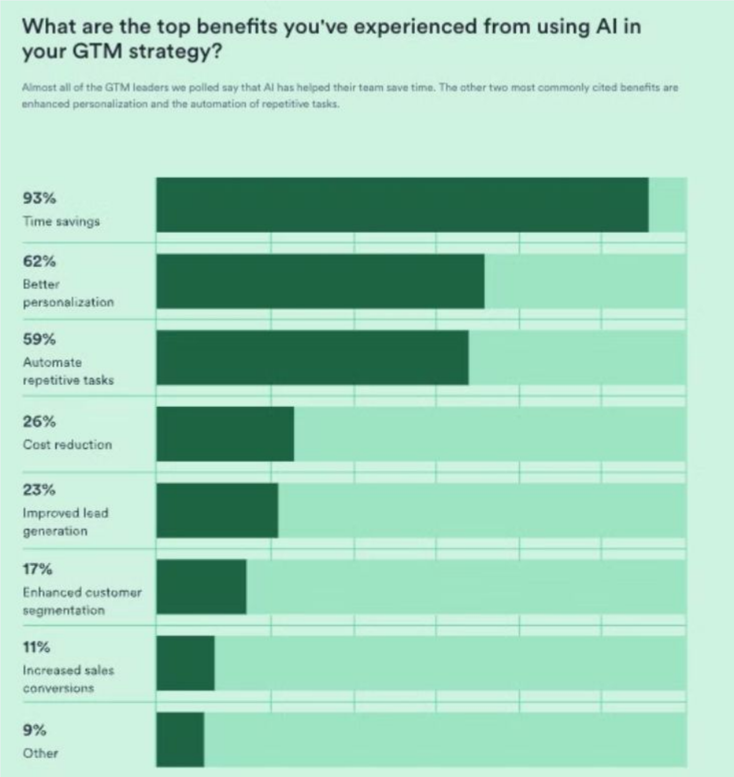
Limited visibility into performance metrics made it difficult to provide targeted coaching or share best practices. This resulted in slower ramp times and stagnant team improvement.

These operational challenges made it impossible to scale effectively or achieve predictable revenue growth.

Enter Artificial Intelligence



The Benefits Are Clear



- Manual, time-consuming processes are transformed into intelligent, automated workflows.
- Organizations can dramatically improve:
  - Prospect targeting
  - Personalized communications at scale
  - Insights from vast amounts of market data

This enables teams to move faster, make better decisions, and achieve significantly higher ROI from their GTM investments.

So... What's the Approach?

Crawl

Start with basic AI implementation, focusing on specific processes and quick wins to build momentum and prove value.

Walk

Expand AI usage across multiple processes and teams, developing more sophisticated workflows and integrations.

Run

Achieve full AI integration across your Go-To-Market strategy, with advanced automation and predictive capabilities.

The AI-Powered Approach:

Crawl

Save Time, Focus on Revenue (< $500/month)

Start your AI journey with these affordable solutions

Marketing Automation

Basic LLM **Chatbots**

Instantly or **SmartLead** for email automation at scale

HubSpot **Breeze**

Lead Management

ICP validation and enrichment with **Clay**

Website deanonymization with **Warmly** or **RB2B** for buyer intent signals

Sales Intelligence

Conversational Intelligence with **Attention** to improve follow-up effectiveness

Salesforce or **HubSpot** AI for deal inspection & Management

HubSpot Breeze

Data Enrichment BETA

Enrich contact and company records with key attributes like role, employer, location, social profiles, annual revenue, industry, address, etc. Use automatic or bulk enrichment and other settings to tailor your strategy to your business needs.

- Enrich contacts and companies with 40+ attributes

Try Data Enrichment

Buyer Intent BETA

Discover right-fit companies that are engaging with your website and ready to buy. Using new reverse-IP and enrichment data sources from Breeze Intelligence and your HubSpot Smart CRM, reveal buyer intent even if they are not in your CRM.

- Reveal companies visiting your website
- Identify buyer intent
- Add enriched companies to your Smart CRM, static lists, and more

Try Buyer Intent

What Clay Can Do...

TAM Sourcing
Build lists of your target accounts and contacts.

Account Based Marketing
Personalize marketing content for your prospective accounts and existing customers at scale.

CRM Enrichment & Hygiene
Keep your CRM automatically enriched, cleaned, and updated.

Inbound Lead Enrichment
Automatically enrich inbound leads in real-time.

Signals and Intent
Reach customers at the right time with the right messaging using 1st & 3rd party data.

AI Outbound
Personalized outreach at scale.

Account & Lead Scoring
Generate custom scores based on the data points that matter to your business.

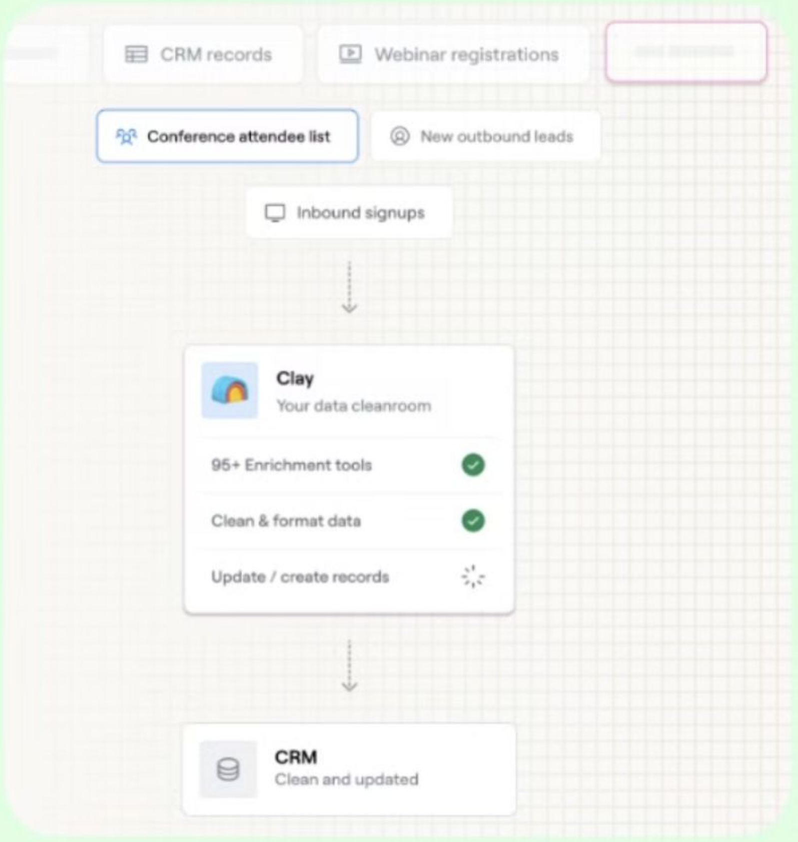
Lead Routing
Automate inbound lead routing.

ICP Enrichment with Clay (Crawl)

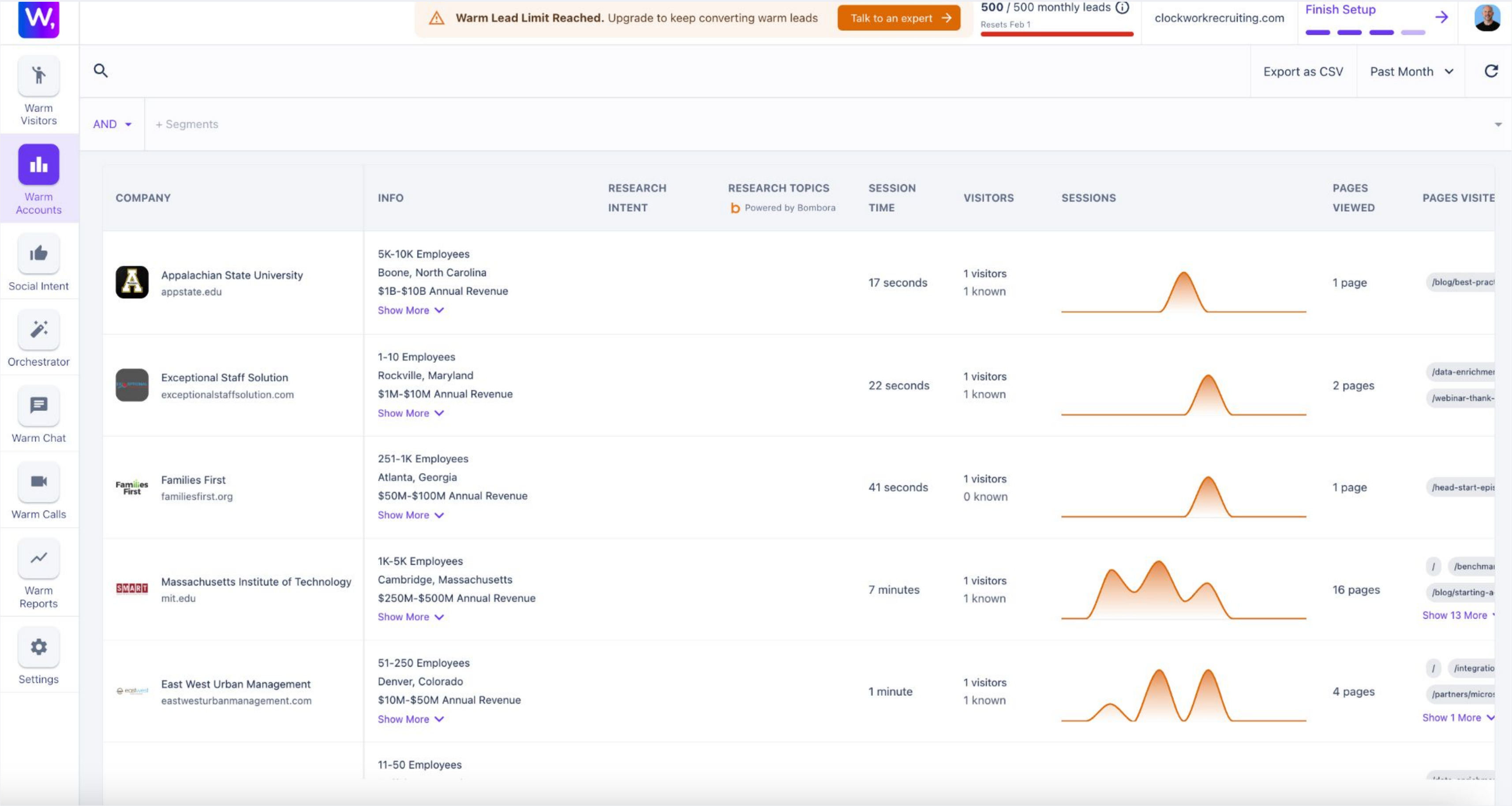
CRM Enrichment & Hygiene

Automatically enrich, clean, and update your CRM.

- Ensure your CRM is the source of truth.
- Routing your data through Clay for enrichment, cleaning, formatting, scoring, and more.



Warmly (Free): Who's On My Site?



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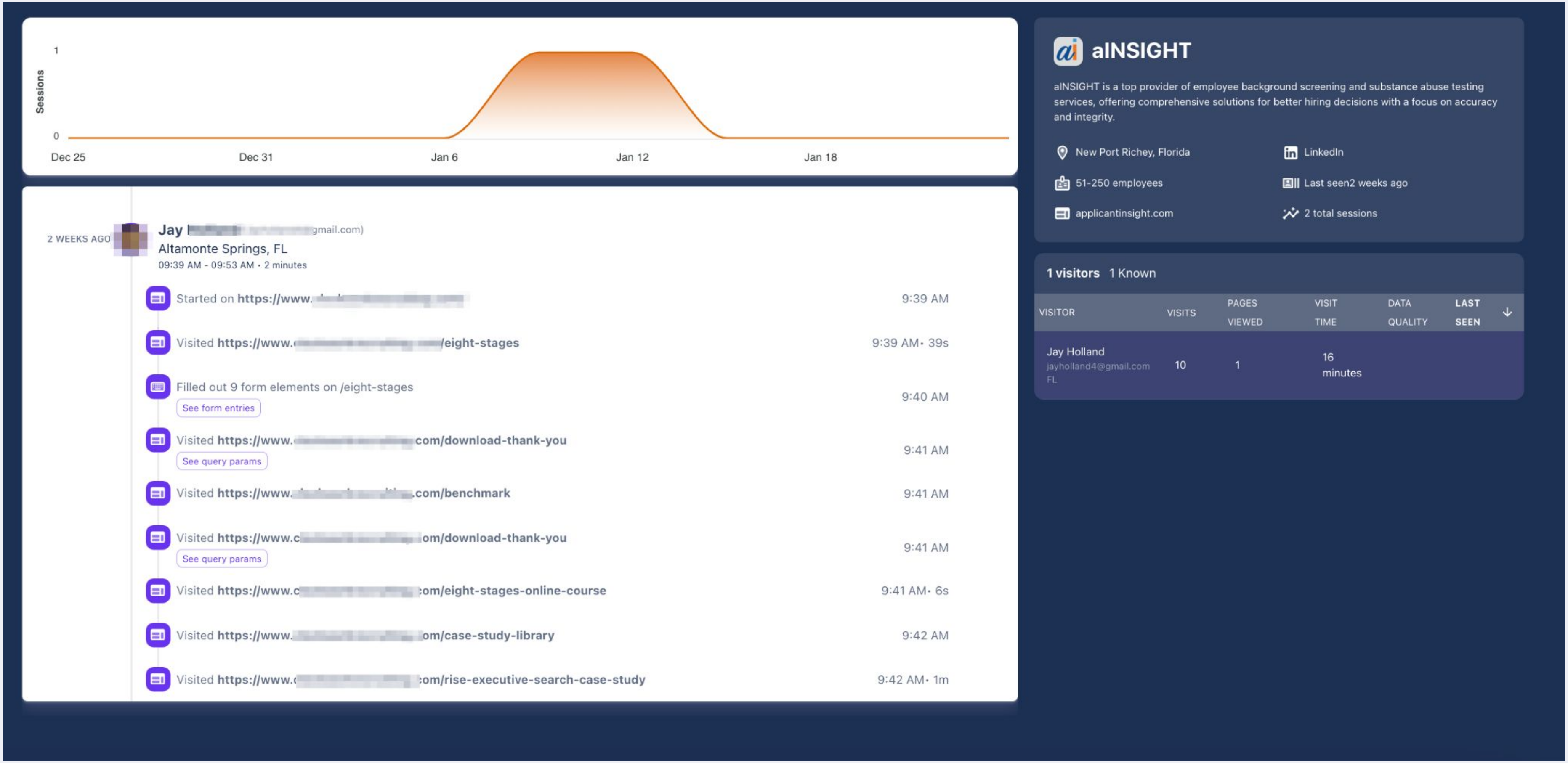
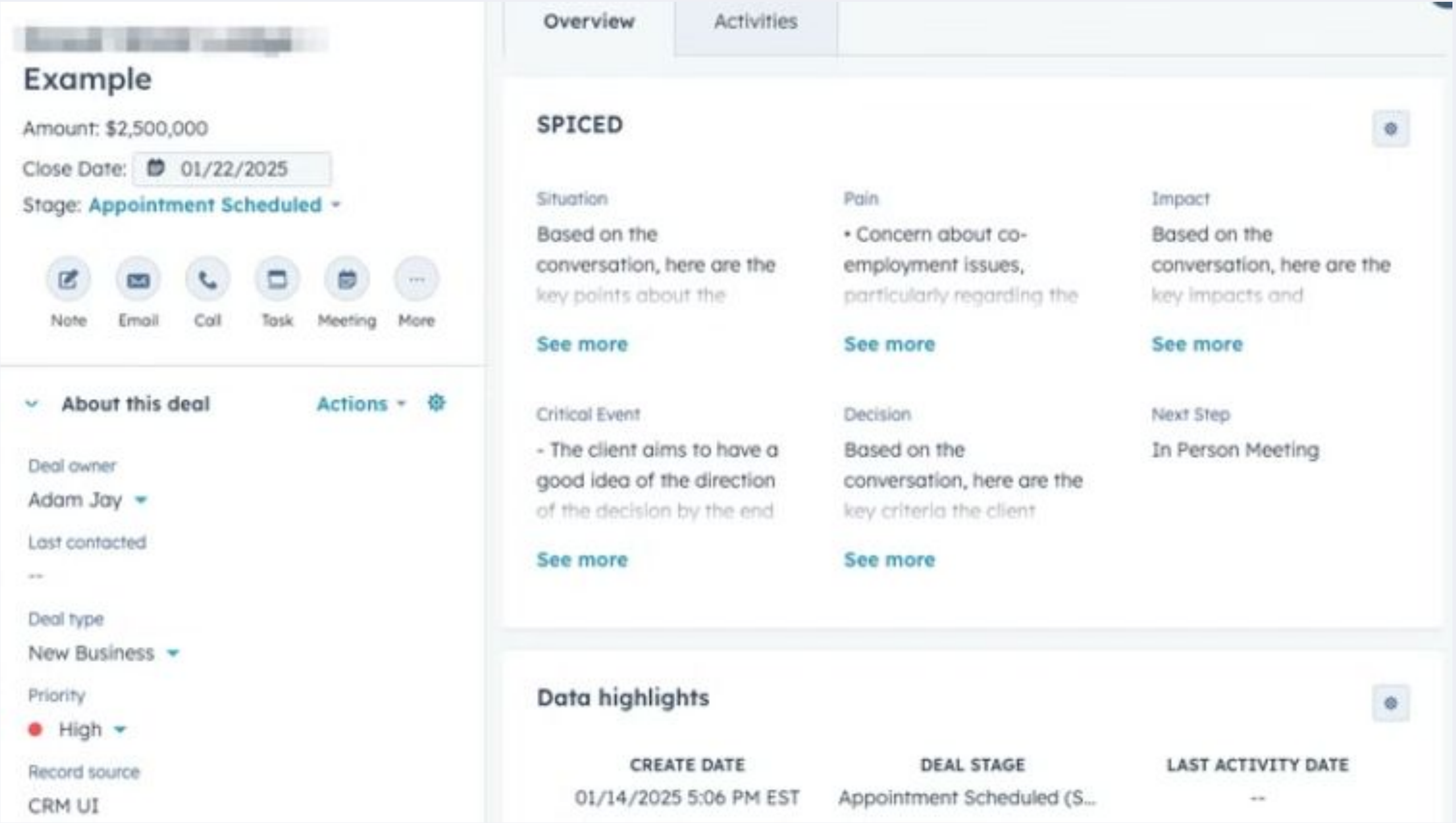
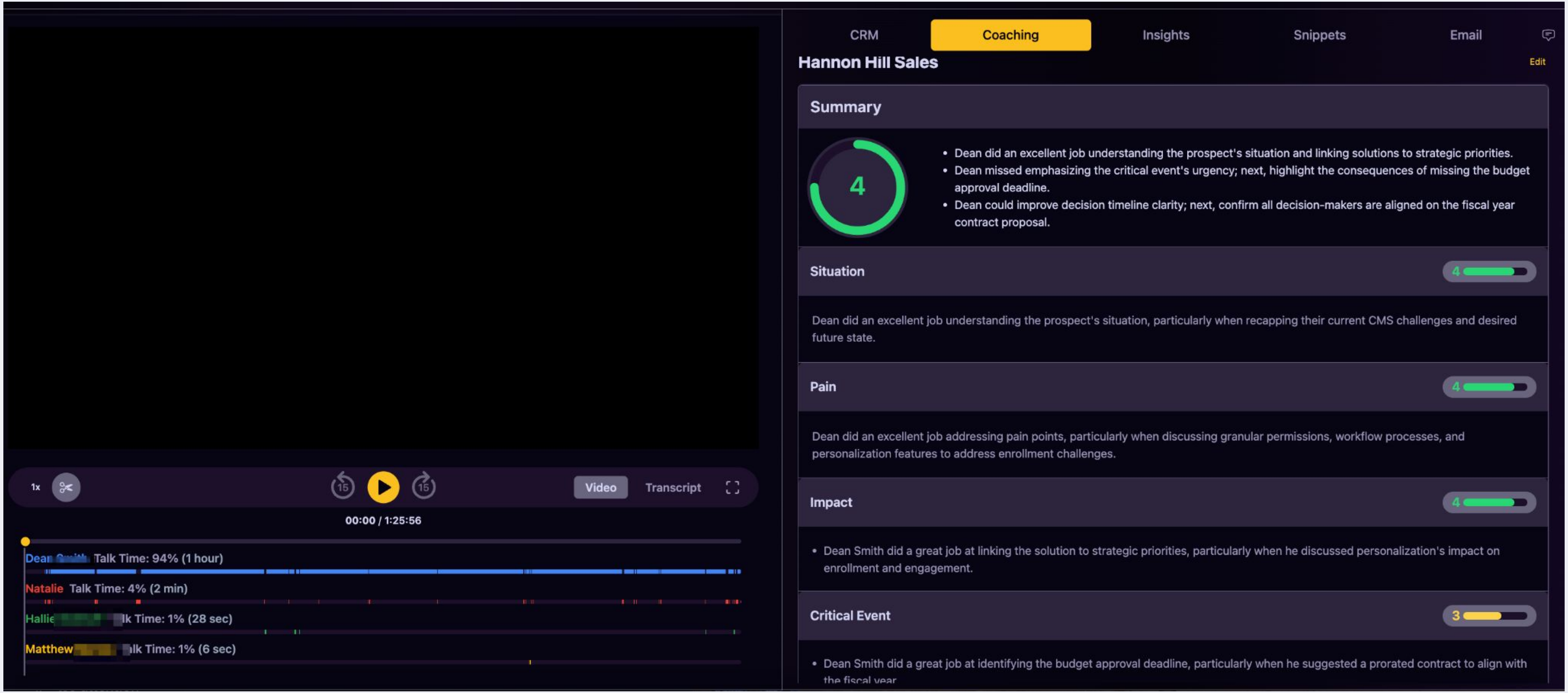


Attention: Sales Methodology Extracted



Attention: Sales Methodology Scoring & Analytics



Attention: Sales Methodology Scoring & Analytics

The AI-Powered Approach: Walk

Just like a toddler's confident steps forward, this is where your AI journey gains momentum. After mastering the basics, you're ready to take bigger strides and explore more sophisticated applications of AI in your go-to-market strategy.

Leveling Up: Walk (< $1,500 per month) - Everything in Crawl Plus...

🎯 Advanced Lead Scoring

Go beyond basic enrichment. Use AI to predict which leads are most likely to convert with paid plans from tools like **Warmly** or **RB2B**

🔄 GTM Orchestration

Tools like **Octave** or even a homegrown **tech-enabled service** to generate custom ICPs and messaging playbooks

📚 Content Repurposing

Tools such as **Opus** allow you to upload one piece of content to generate many

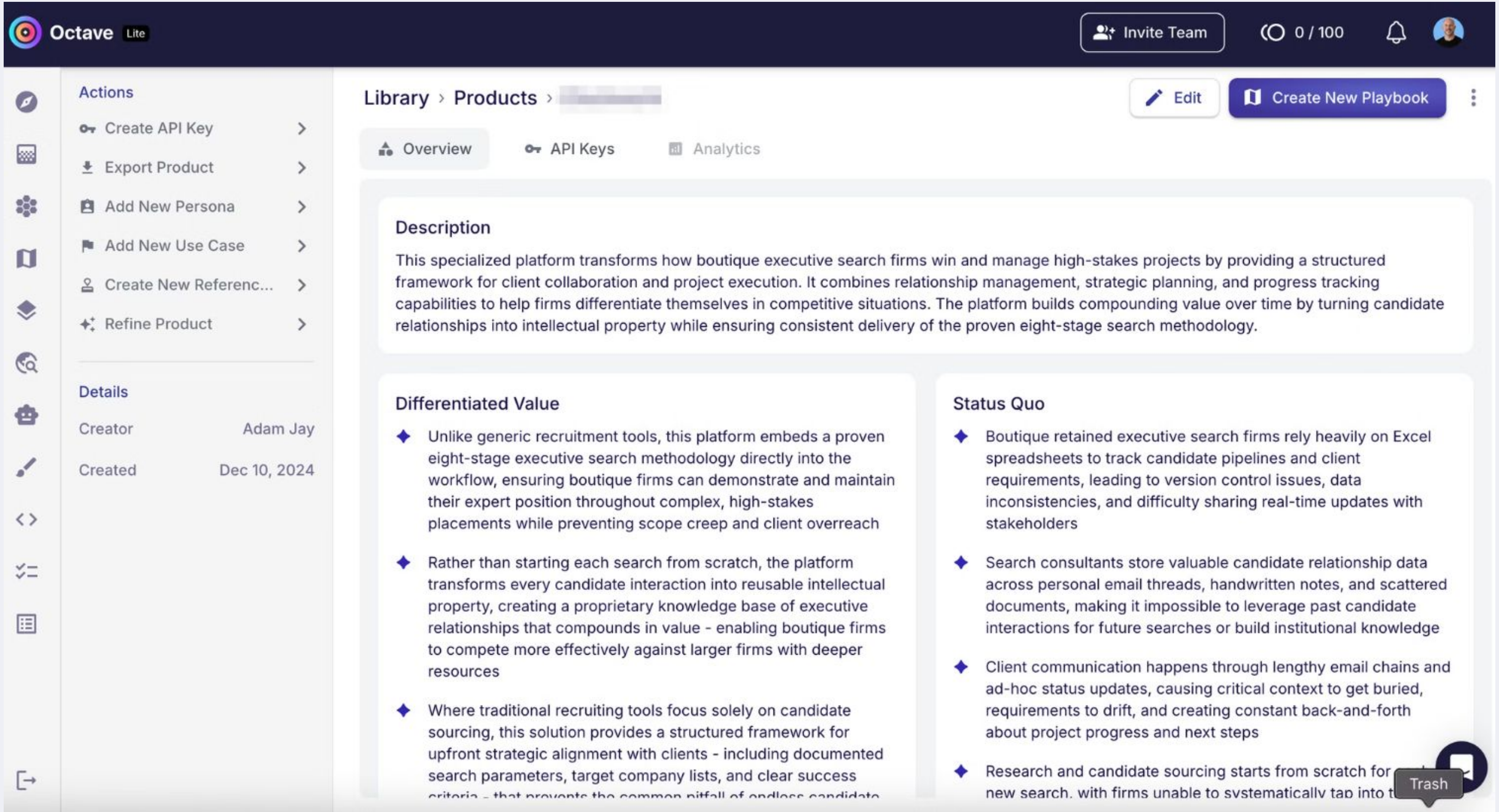
🎯 Enrichment/Segmentation

Deeper use of tools like **Clay** to hone in on specific subsets of your ICP and nuanced messaging

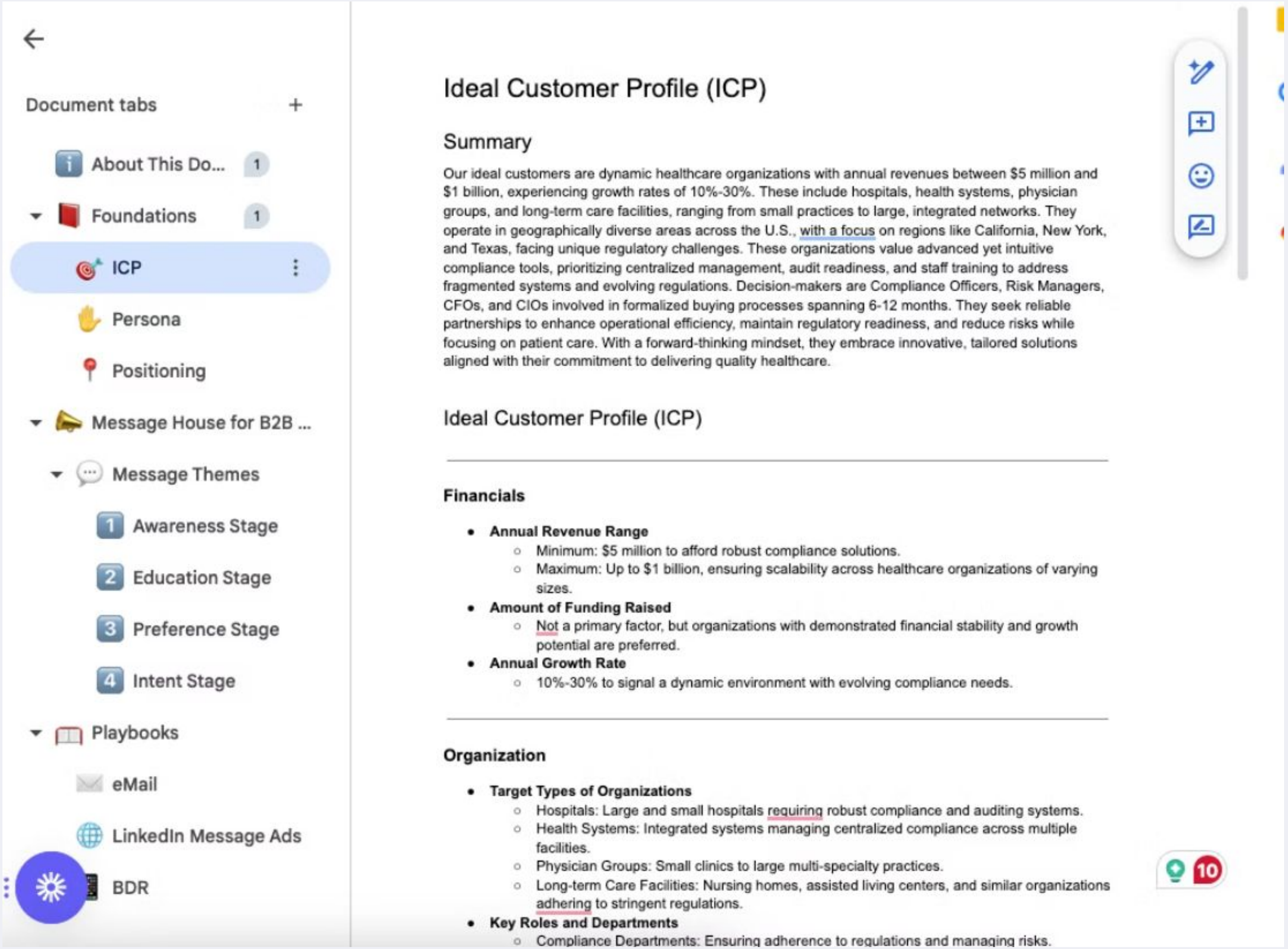
💼 Deal Rooms

Integration of platforms like **Aligned** to uncover buyer behavior and track all communication in one spot

Octave: UVP and ICP Creation



Homegrown Custom ICP Build



Document tabs

About This Do...
Foundations
ICP
Persona
Positioning
Message House for B2B ...
Message Themes
Awareness Stage
Education Stage
Preference Stage
Intent Stage
Playbooks
eMail
LinkedIn Message Ads
BDR

Ideal Customer Profile (ICP)

Summary

Our ideal customers are dynamic healthcare organizations with annual revenues between $5 million and $1 billion, experiencing growth rates of 10%-30%. These include hospitals, health systems, physician groups, and long-term care facilities, ranging from small practices to large, integrated networks. They operate in geographically diverse areas across the U.S., with a focus on regions like California, New York, and Texas, facing unique regulatory challenges. These organizations value advanced yet intuitive compliance tools, prioritizing centralized management, audit readiness, and staff training to address fragmented systems and evolving regulations. Decision-makers are Compliance Officers, Risk Managers, CFOs, and CIOs involved in formalized buying processes spanning 6-12 months. They seek reliable partnerships to enhance operational efficiency, maintain regulatory readiness, and reduce risks while focusing on patient care. With a forward-thinking mindset, they embrace innovative, tailored solutions aligned with their commitment to delivering quality healthcare.

Ideal Customer Profile (ICP)

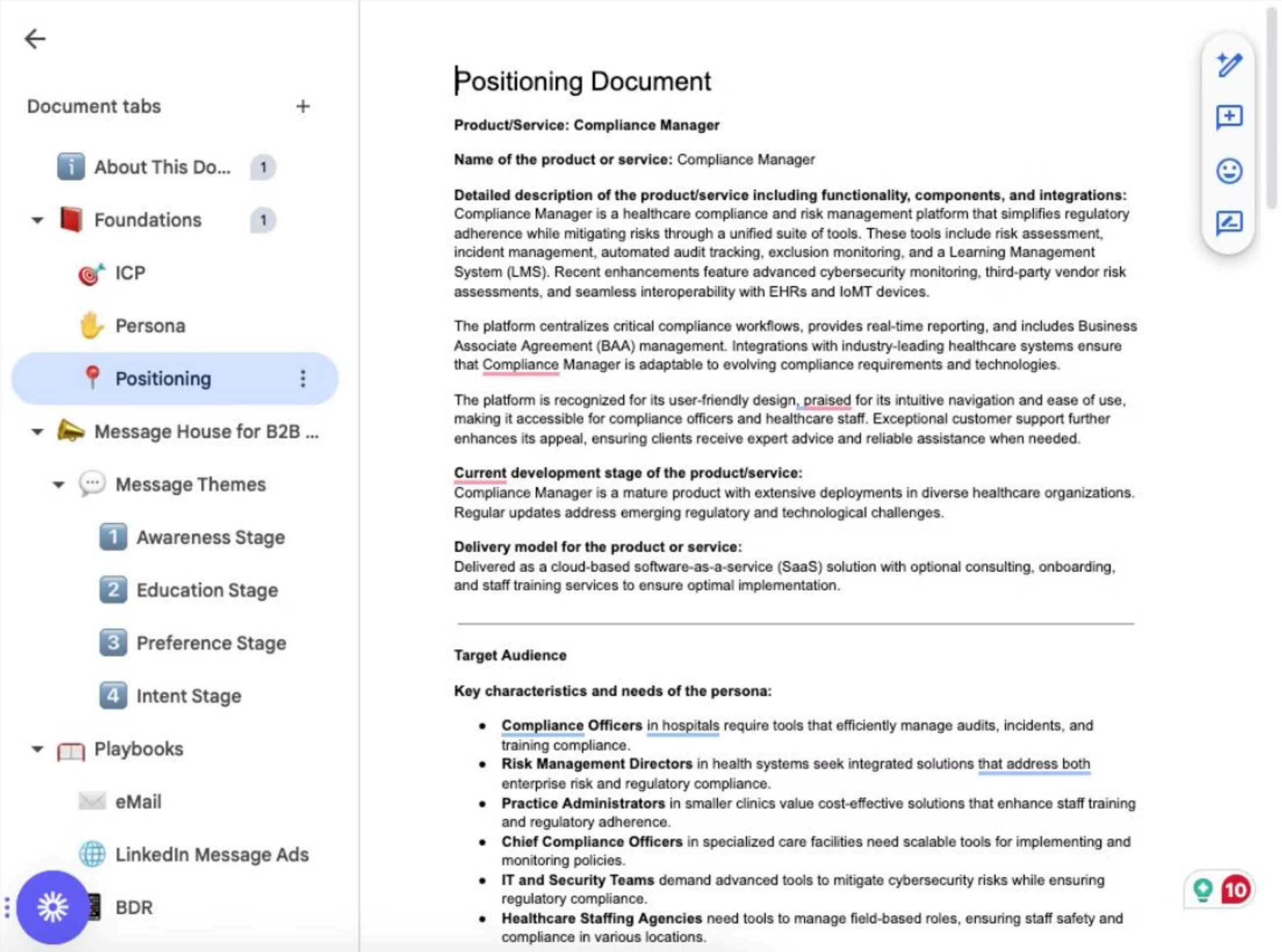
Financials

- **Annual Revenue Range**
  - Minimum: $5 million to afford robust compliance solutions.
  - Maximum: Up to $1 billion, ensuring scalability across healthcare organizations of varying sizes.
- **Amount of Funding Raised**
  - Not a primary factor, but organizations with demonstrated financial stability and growth potential are preferred.
- **Annual Growth Rate**
  - 10%-30% to signal a dynamic environment with evolving compliance needs.

Organization

- **Target Types of Organizations**
  - Hospitals: Large and small hospitals requiring robust compliance and auditing systems.
  - Health Systems: Integrated systems managing centralized compliance across multiple facilities.
  - Physician Groups: Small clinics to large multi-specialty practices.
  - Long-term Care Facilities: Nursing homes, assisted living centers, and similar organizations adhering to stringent regulations.
- **Key Roles and Departments**
  - Compliance Departments: Ensuring adherence to regulations and managing risks.

Homegrown UVP Build



Positioning Document

Product/Service: Compliance Manager

Name of the product or service: Compliance Manager

Detailed description of the product/service including functionality, components, and integrations:
Compliance Manager is a healthcare compliance and risk management platform that simplifies regulatory adherence while mitigating risks through a unified suite of tools. These tools include risk assessment, incident management, automated audit tracking, exclusion monitoring, and a Learning Management System (LMS). Recent enhancements feature advanced cybersecurity monitoring, third-party vendor risk assessments, and seamless interoperability with EHRs and IoMT devices.

The platform centralizes critical compliance workflows, provides real-time reporting, and includes Business Associate Agreement (BAA) management. Integrations with industry-leading healthcare systems ensure that Compliance Manager is adaptable to evolving compliance requirements and technologies.

The platform is recognized for its user-friendly design, praised for its intuitive navigation and ease of use, making it accessible for compliance officers and healthcare staff. Exceptional customer support further enhances its appeal, ensuring clients receive expert advice and reliable assistance when needed.

Current development stage of the product/service:
Compliance Manager is a mature product with extensive deployments in diverse healthcare organizations. Regular updates address emerging regulatory and technological challenges.

Delivery model for the product or service:
Delivered as a cloud-based software-as-a-service (SaaS) solution with optional consulting, onboarding, and staff training services to ensure optimal implementation.

Target Audience

Key characteristics and needs of the persona:

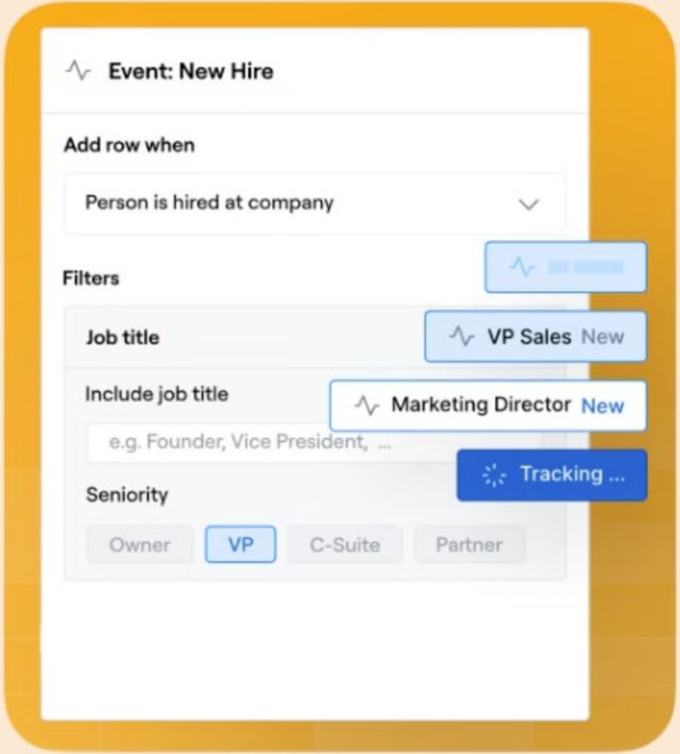
- **Compliance Officers** in hospitals require tools that efficiently manage audits, incidents, and training compliance.
- **Risk Management Directors** in health systems seek integrated solutions that address both enterprise risk and regulatory compliance.
- **Practice Administrators** in smaller clinics value cost-effective solutions that enhance staff training and regulatory adherence.
- **Chief Compliance Officers** in specialized care facilities need scalable tools for implementing and monitoring policies.
- **IT and Security Teams** demand advanced tools to mitigate cybersecurity risks while ensuring regulatory compliance.
- **Healthcare Staffing Agencies** need tools to manage field-based roles, ensuring staff safety and compliance in various locations.

Clay Signals & Intent

Signals & Intent

Reach customers at the right time with the right messaging

- Track job changers, new hires, promotions, and more using 3rd party data
- Track when someone visits your site using 1st party data



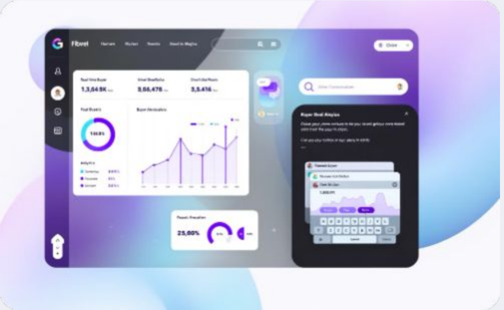
The AI-Powered Approach:

Run

Deep AI Automation Throughout ($1,500 per month - ???)

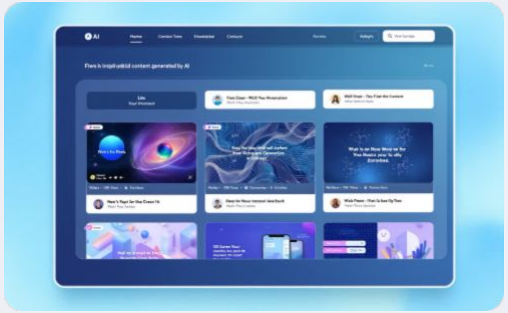
Deep Enrichment

Advanced segmentation and sophisticated targeting through **Clay's** powerful enrichment capabilities. Go beyond basic firmographic data to identify precise customer segments like first-time CEOs, companies with recent funding, or businesses experiencing specific growth patterns. This deep enrichment enables hyper-targeted campaigns with unprecedented accuracy.



Integrated Deal Rooms

Sophisticated deal rooms like **Aligned** seamlessly connect with your CRM ecosystem. Get real-time visibility into buyer behavior, track every touchpoint, and analyze engagement patterns across your entire customer journey. A central hub for all prospect interactions, providing sales teams with actionable insights about buyer intent, potential roadblocks, and optimal next steps.



AI-Driven Videos

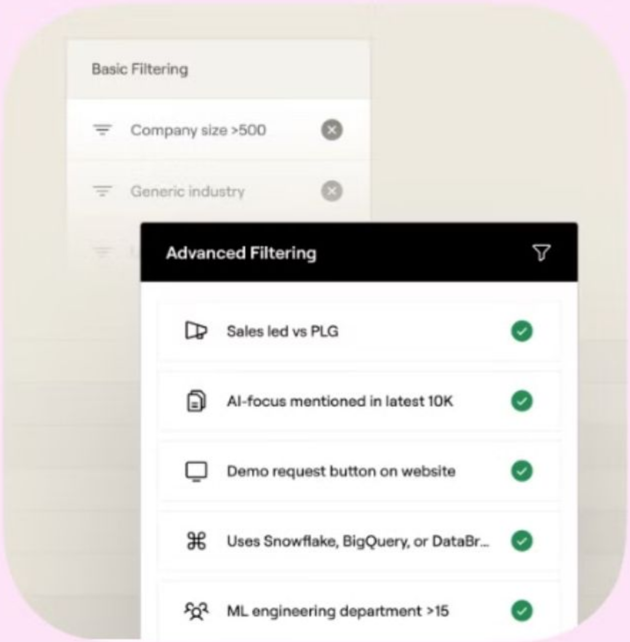
Increase prospect engagement with tools like **SendSpark**. Create highly personalized video content that automatically adapts to each prospect's industry, role, and specific challenges. Sales teams can scale their video outreach while maintaining a personal touch. This approach typically results in 40-50% higher response rates compared to traditional outreach methods.

Deep Enrichment and Scoring

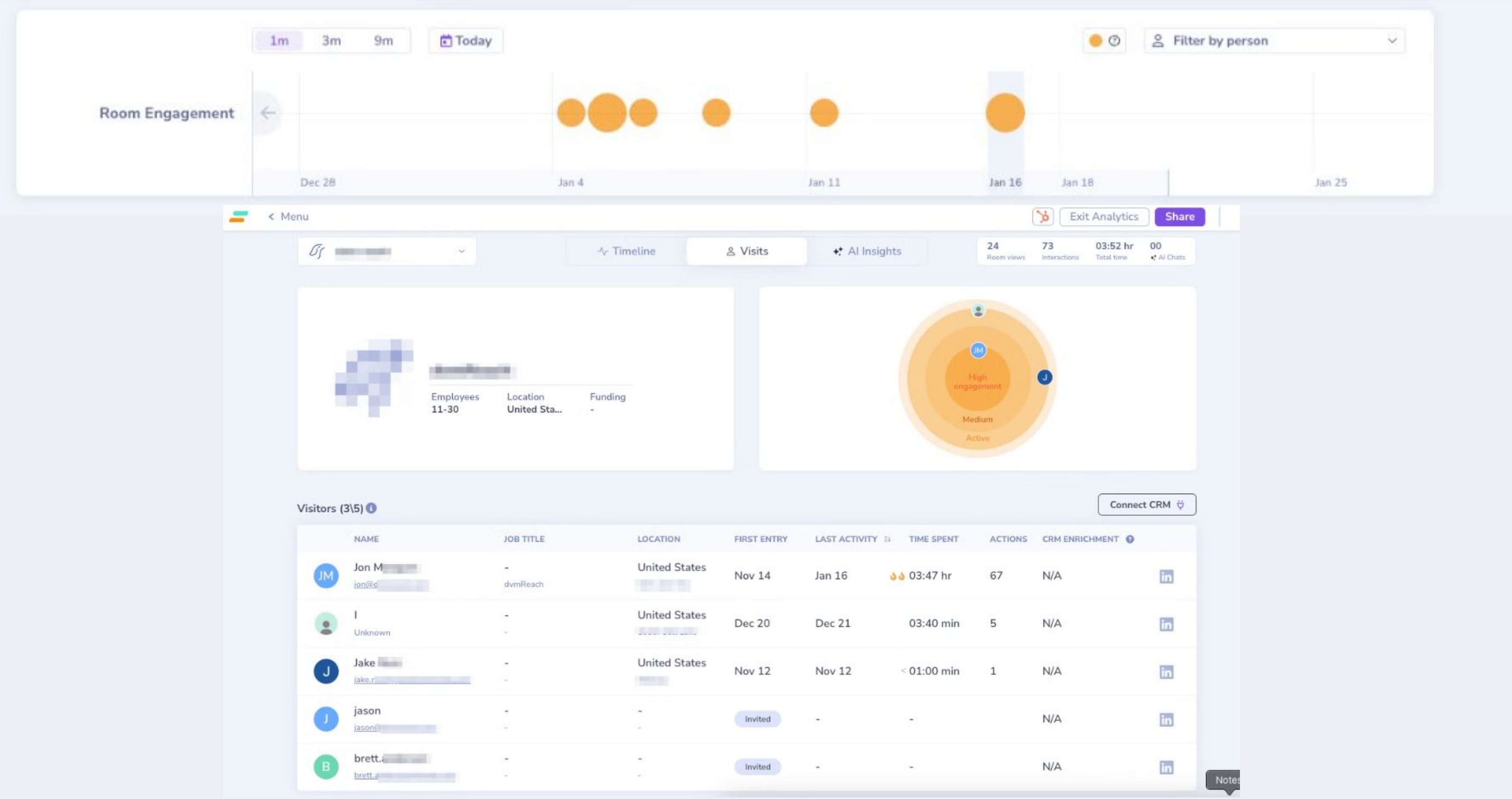
Account & Lead Scoring

Generate custom scores based on the data points that matter.

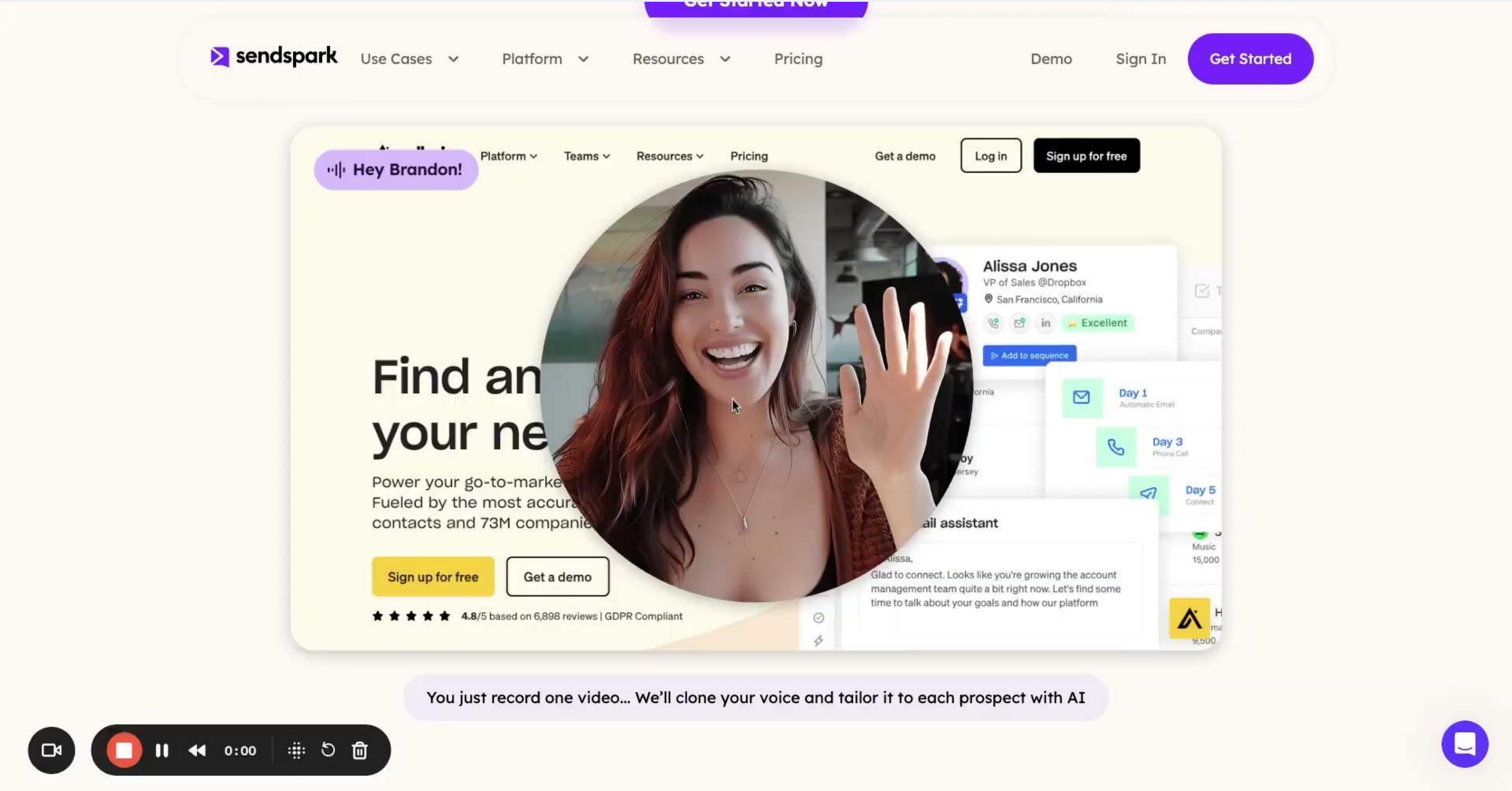
- Apply unique filters to narrow in on your best-fit customers.
- Find the most accurate data points using 100+ providers & AI to search the internet.



Example: Aligned - Deal Room Insights



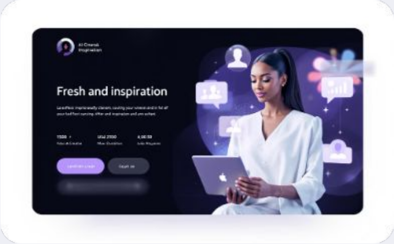
Sendspark: AI Video at Scale



The AI-Powered Approach: Run

Conversational Intelligence

Advanced AI tools like **Attention** automatically analyze calls and craft personalized follow-up emails based on conversation insights.



AI Sales Engineers

Virtual AI avatars like **Docket.ai** join calls to provide detailed product information and technical expertise that is 100% accurate and instantly available.

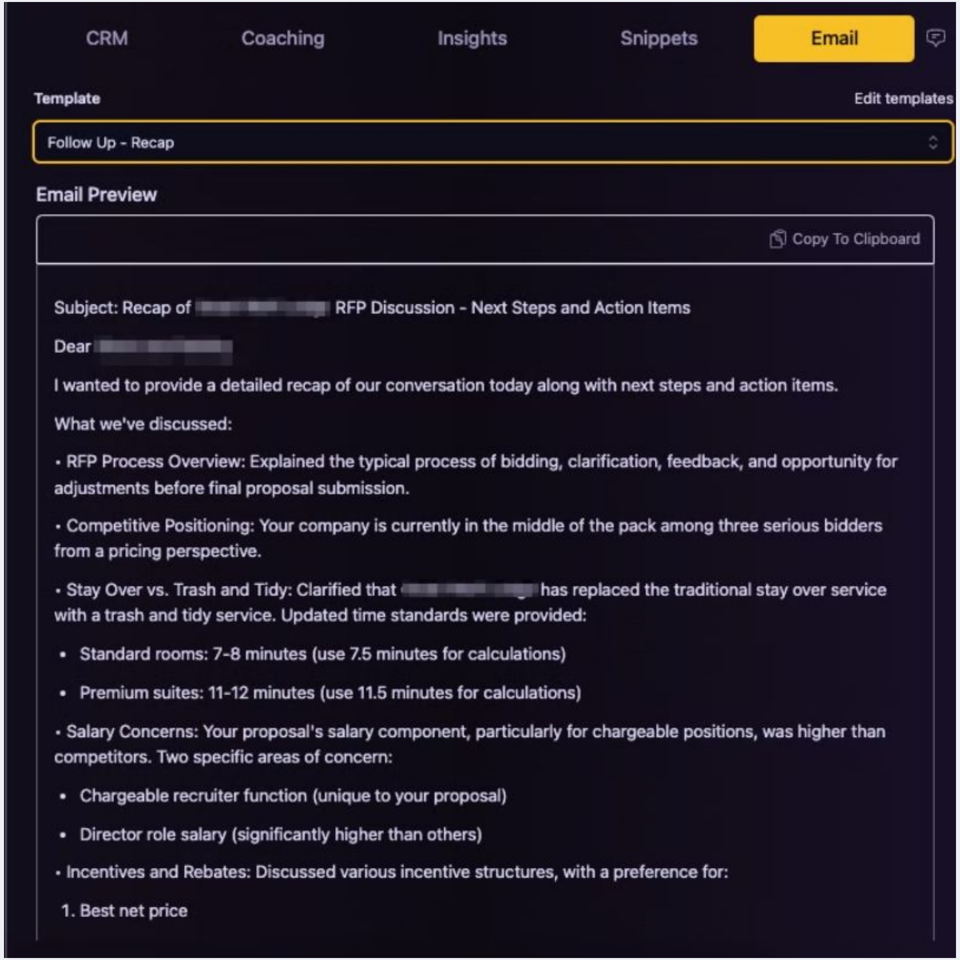
Social Intelligence

Integrated platforms like **Brandwatch and Pulsar** scan online sources to proactively identify messaging opportunities and market signals.

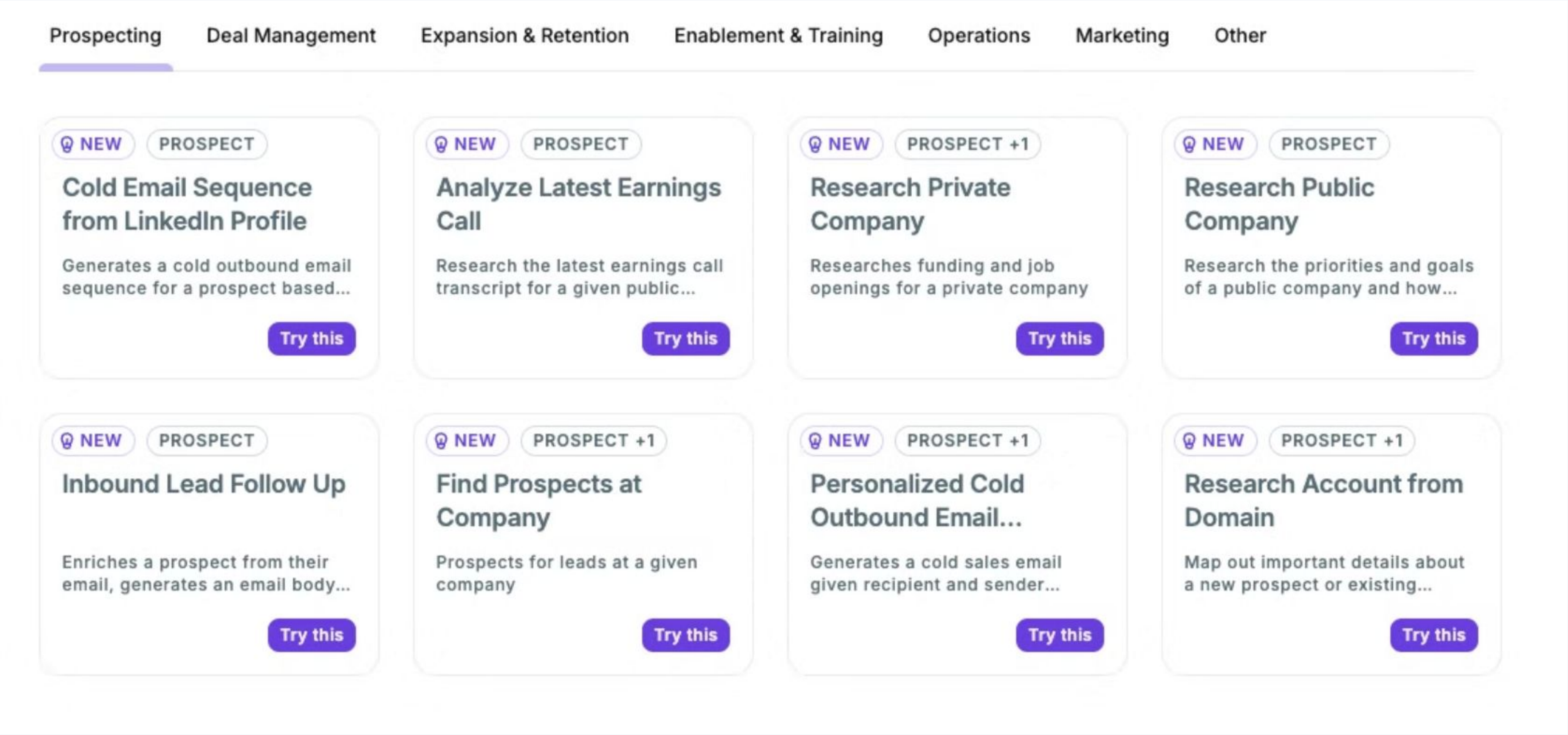
AI Content Creation

Comprehensive AI tools like Copy.ai for generating and optimizing messaging and content at scale.

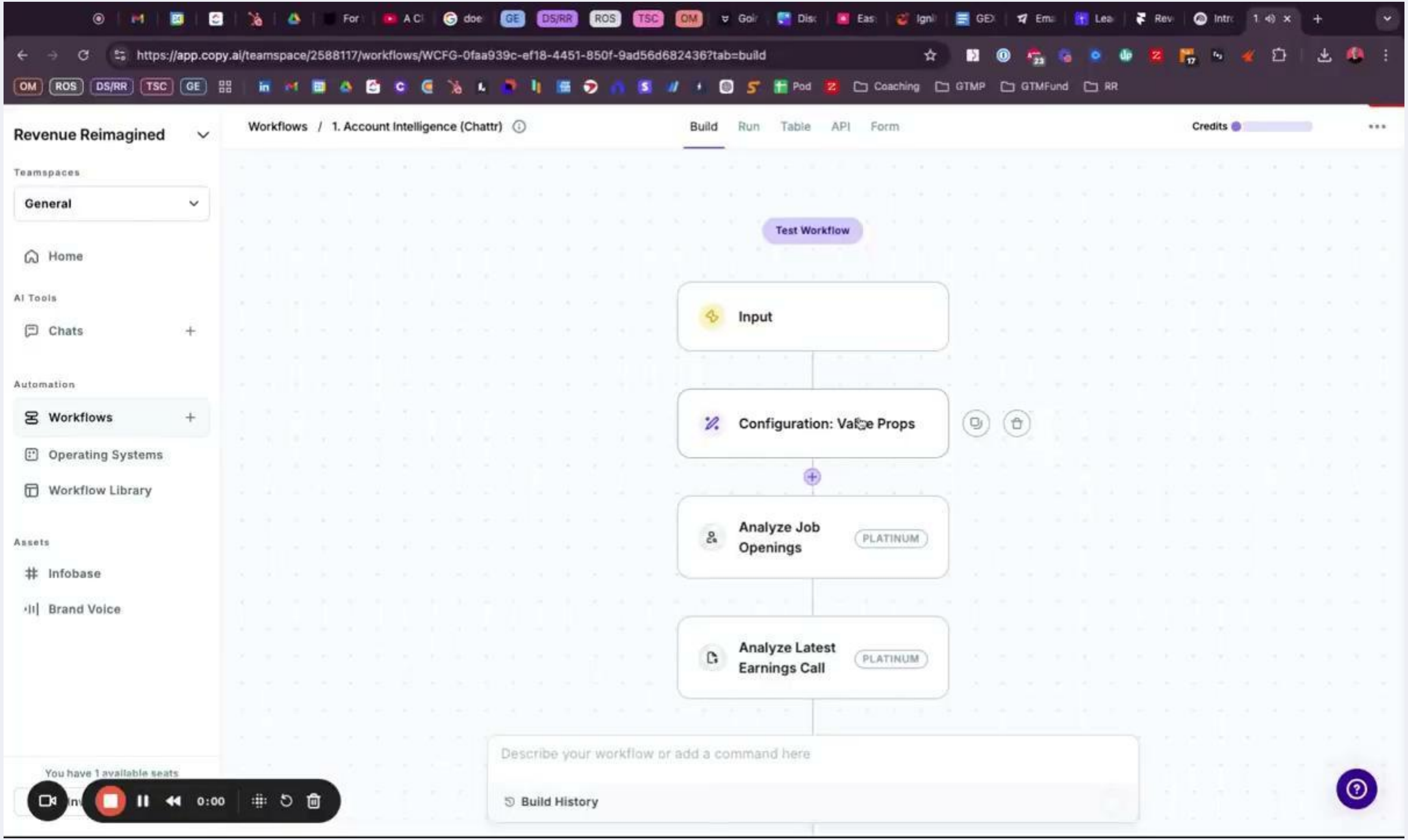
Attention: One-touch Email Follow-ups



Comprehensive Workflows with Copy.ai



Copy.ai: Automated Account Plans



The Future of AI in Sales

AI Agents Lead the Way

Agent technology attracting major investment, with evolving capabilities shaping future sales processes.

Platform Consolidation Accelerates

AI driving consolidation of tools and platforms, with solutions like Salesforce's "Agent Force" emerging as all-in-one platforms.

AI Purchasing Agents Evolve

Rise of AI-enabled purchasing tools, leading to "agent optimization" where buyer and seller AI systems interact.

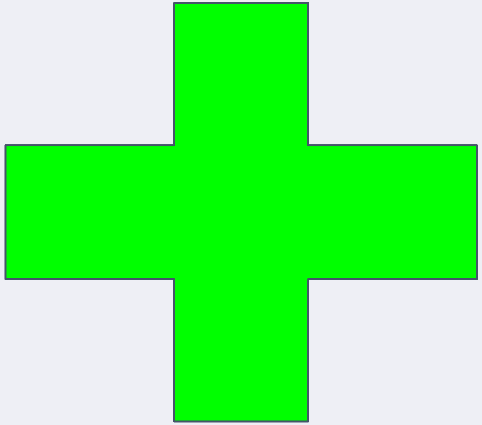
Regulatory Frameworks Emerge

Over 700 pieces of legislation introduced in past 6-months, focusing on data privacy, algorithmic fairness, and AI-driven sales transparency.

Enterprise Governance Matures

Major corporations like KPMG and Walmart establishing comprehensive enterprise-level structures for AI implementation and usage.

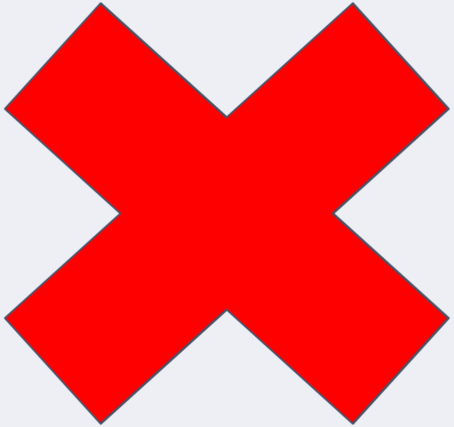
AI Do's and Don'ts



Experiment and have fun

Start small and focus on core principles

Keep humans in the loop



Pretend AI is human

Fully automate sensitive tasks

Neglect data privacy and security

Key Takeaways

1. **Start Your AI Journey Now**
   Don't wait for perfection. Begin experimenting with AI tools today.

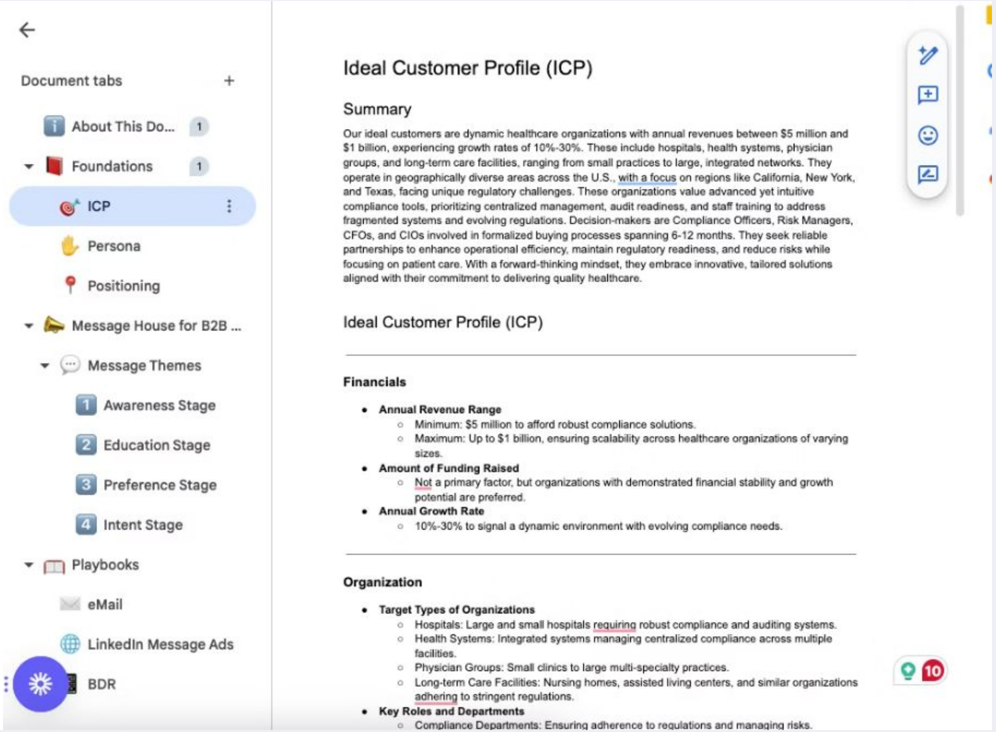
2. **Focus on Integration**
   Ensure AI tools work seamlessly with your existing tech stack.

3. **Prioritize Human Touch**
   Use AI to enhance, not replace, human relationships in sales.

4. **Stay Adaptable**
   The AI landscape is rapidly changing. Be prepared to pivot and learn.

One Final Question

Get Your Free ICP and Value Prop Document



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