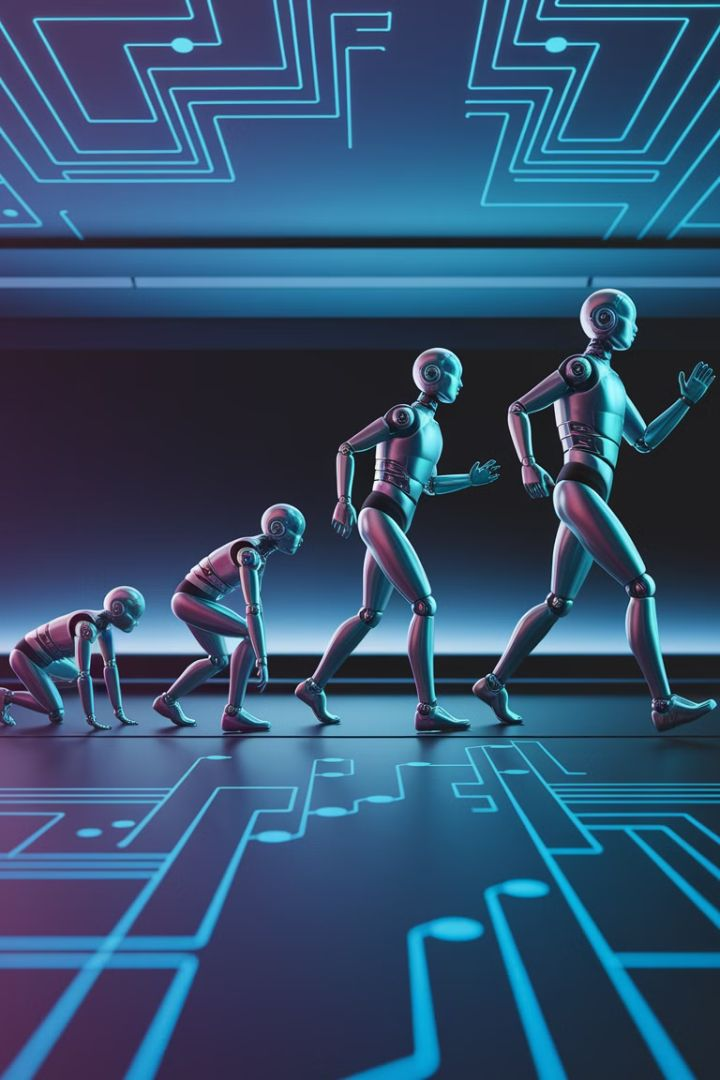




The Evolution of Artificial Intelligence (AI) in Go-To-Market

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

Without 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.

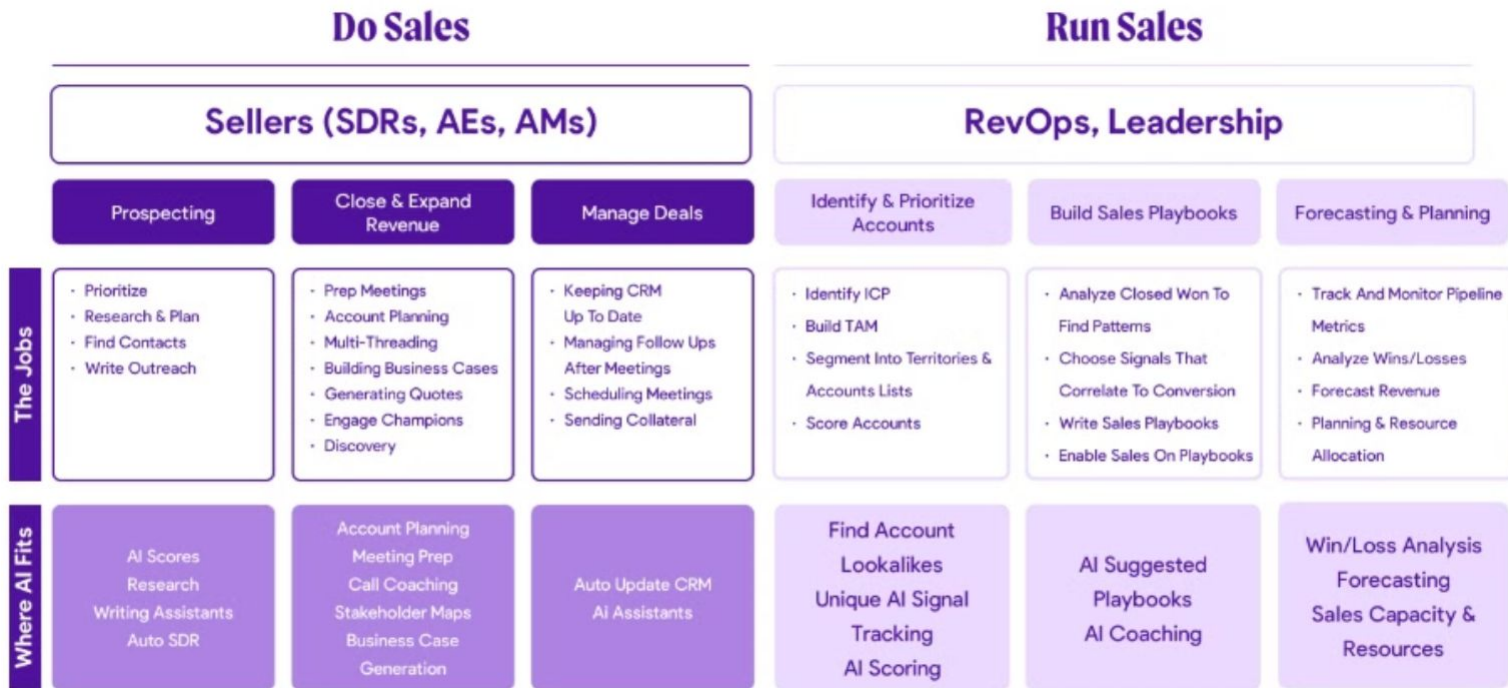


Coaching Challenges

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.

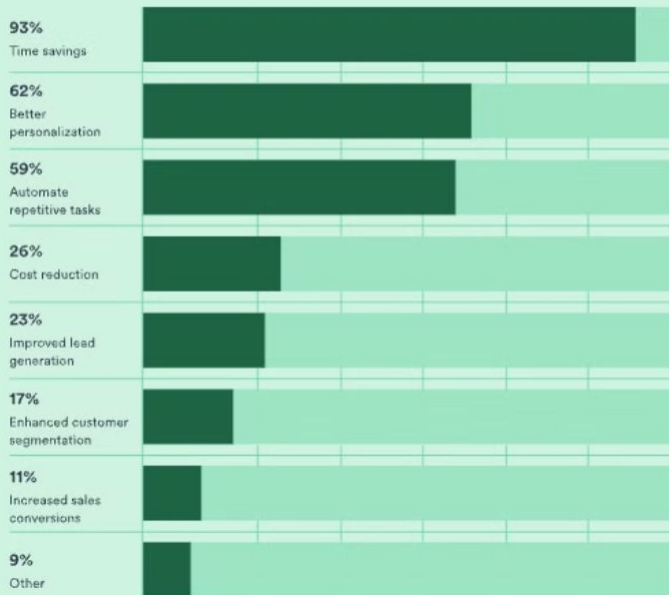
Enter Artificial Intelligence



The Benefits Are Clear

What are the top benefits you've experienced from using AI in your GTM strategy?

Almost all of the GTM leaders we polled say that AI has helped their team save time. The other two most commonly cited benefits are enhanced personalization and the automation of repetitive tasks.



- 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

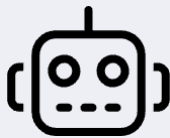
Achieve full AI integration across your Go-To-Market strategy, with advanced automation and predictive capabilities.

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

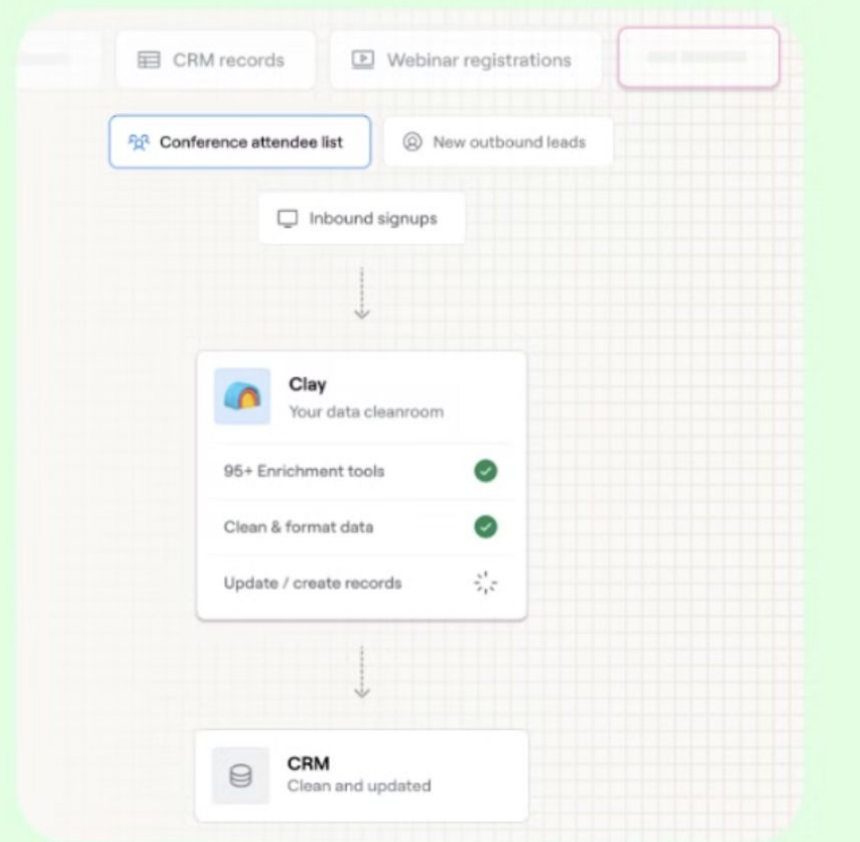
Automate inbound lead routing.

ICP Enrichment with Clay (Crawl)

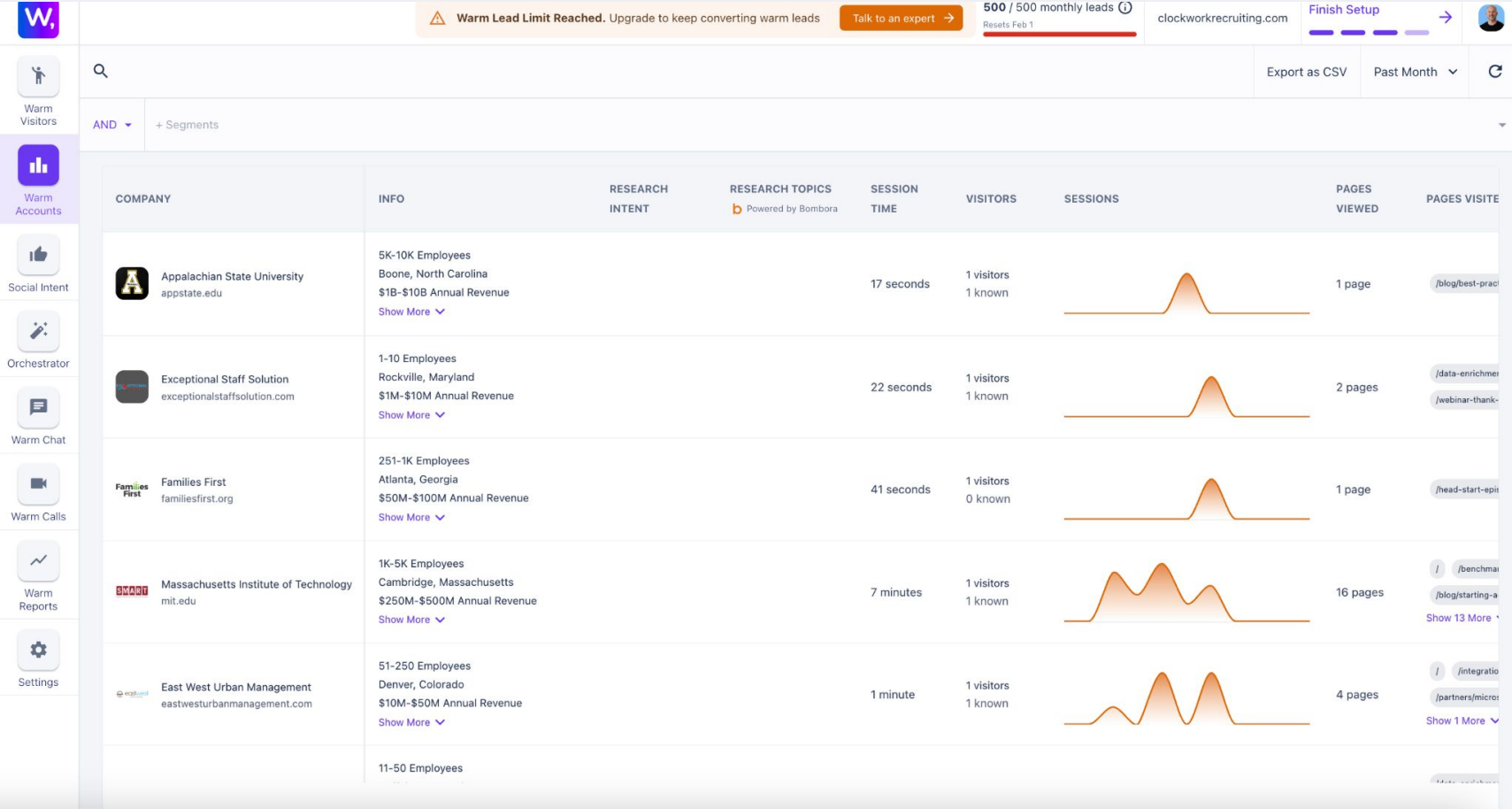
CRM Enrichment & Hygiene

Automatically enrich, clean, and update your CRM.

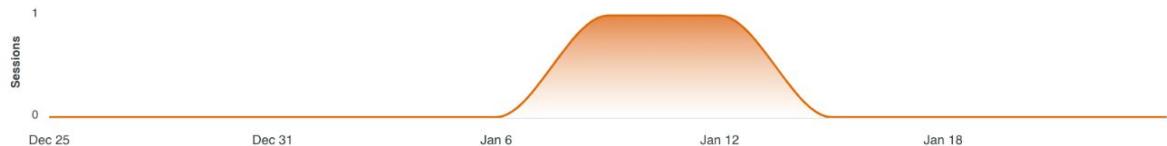
- Ensure your CRM is the source of truth.
- Routing your data through Clay for enrichment, cleaning, formatting, scoring, and more.



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



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



2 WEEKS AGO  **Jay**  (gmail.com)
Altamonte Springs, FL
09:39 AM - 09:53 AM - 2 minutes

-  Started on [https://www. \[redacted\]](https://www. [redacted]) 9:39 AM
-  Visited [https://www. \[redacted\] /eight-stages](https://www. [redacted] /eight-stages) 9:39 AM • 39s
-  Filled out 9 form elements on /eight-stages
[See form entries](#) 9:40 AM
-  Visited [https://www. \[redacted\] .com/download-thank-you](https://www. [redacted] .com/download-thank-you)
[See query params](#) 9:41 AM
-  Visited [https://www. \[redacted\] .com/benchmark](https://www. [redacted] .com/benchmark) 9:41 AM
-  Visited [https://www. \[redacted\] .com/download-thank-you](https://www. [redacted] .com/download-thank-you)
[See query params](#) 9:41 AM
-  Visited [https://www. \[redacted\] .com/eight-stages-online-course](https://www. [redacted] .com/eight-stages-online-course) 9:41 AM • 6s
-  Visited [https://www. \[redacted\] .com/case-study-library](https://www. [redacted] .com/case-study-library) 9:42 AM
-  Visited [https://www. \[redacted\] .com/rise-executive-search-case-study](https://www. [redacted] .com/rise-executive-search-case-study) 9:42 AM • 1m



aINSIGHT is a top provider of employee background screening and substance abuse testing services, offering comprehensive solutions for better hiring decisions with a focus on accuracy and integrity.

 New Port Richey, Florida

 LinkedIn

 51-250 employees

 Last seen 2 weeks ago

 applicantinsight.com

 2 total sessions

1 visitors 1 Known

VISITOR	VISITS	PAGES VIEWED	VISIT TIME	DATA QUALITY	LAST SEEN	↓
Jay Holland jayholland4@gmail.com FL	10	1	16 minutes			

Attention: Sales Methodology Extracted

Example

Amount: \$2,500,000

Close Date: 01/22/2025

Stage: Appointment Scheduled

Note

Email

Call

Task

Meeting

More

About this deal

Actions

Deal owner

Adam Jay

Last contacted

--

Deal type

New Business

Priority

High

Record source

CRM UI

Overview

Activities

SPICED

Situation

Based on the conversation, here are the key points about the

See more

Pain

• Concern about co-employment issues, particularly regarding the

See more

Impact

Based on the conversation, here are the key impacts and

See more

Critical Event

- The client aims to have a good idea of the direction of the decision by the end

See more

Decision

Based on the conversation, here are the key criteria the client

See more

Next Step

In Person Meeting

Data highlights

CREATE DATE

01/14/2025 5:06 PM EST

DEAL STAGE

Appointment Scheduled (S...

LAST ACTIVITY DATE

--

Attention: Sales Methodology Scoring & Analytics

1x

15

15

00:00 / 1:25:56

Video

Transcript

Dean Smith

Talk Time: 94% (1 hour)

Natalie

Talk Time: 4% (2 min)

Hallie

Talk Time: 1% (28 sec)

Matthew

Talk Time: 1% (6 sec)

CRM

Coaching

Insights

Snippets

Email

Edit

Hannon Hill Sales

Summary

4

- Dean did an excellent job understanding the prospect's situation and linking solutions to strategic priorities.
- Dean missed emphasizing the critical event's urgency; next, highlight the consequences of missing the budget approval deadline.
- Dean could improve decision timeline clarity; next, confirm all decision-makers are aligned on the fiscal year contract proposal.

Situation

4

Dean did an excellent job understanding the prospect's situation, particularly when recapping their current CMS challenges and desired future state.

Pain

4

Dean did an excellent job addressing pain points, particularly when discussing granular permissions, workflow processes, and personalization features to address enrollment challenges.

Impact

4

- Dean Smith did a great job at linking the solution to strategic priorities, particularly when he discussed personalization's impact on enrollment and engagement.

Critical Event

3

- Dean Smith did a great job at identifying the budget approval deadline, particularly when he suggested a prorated contract to align with the fiscal year

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

The screenshot displays the Octave Lite web application interface. The top navigation bar includes the Octave logo, a user profile icon, and buttons for 'Invite Team', '0 / 100', and a notification bell. The left sidebar contains a list of actions and details. The main content area shows the 'Library > Products' page for a specific product, with tabs for 'Overview', 'API Keys', and 'Analytics'. The 'Overview' tab is active, displaying a 'Description' section and two columns of 'Differentiated Value' and 'Status Quo' points.

Octave Lite

Actions

- Create API Key >
- Export Product >
- Add New Persona >
- Add New Use Case >
- Create New Referenc... >
- Refine Product >

Details

Creator	Adam Jay
Created	Dec 10, 2024

Library > Products >

Overview API Keys Analytics

Edit **Create New Playbook**

Description

This specialized platform transforms how boutique executive search firms win and manage high-stakes projects by providing a structured framework for client collaboration and project execution. It combines relationship management, strategic planning, and progress tracking capabilities to help firms differentiate themselves in competitive situations. The platform builds compounding value over time by turning candidate relationships into intellectual property while ensuring consistent delivery of the proven eight-stage search methodology.

Differentiated Value

- Unlike generic recruitment tools, this platform embeds a proven eight-stage executive search methodology directly into the workflow, ensuring boutique firms can demonstrate and maintain their expert position throughout complex, high-stakes placements while preventing scope creep and client overreach
- Rather than starting each search from scratch, the platform transforms every candidate interaction into reusable intellectual property, creating a proprietary knowledge base of executive relationships that compounds in value - enabling boutique firms to compete more effectively against larger firms with deeper resources
- Where traditional recruiting tools focus solely on candidate sourcing, this solution provides a structured framework for upfront strategic alignment with clients - including documented search parameters, target company lists, and clear success criteria - that prevents the common pitfall of endless candidate

Status Quo

- Boutique retained executive search firms rely heavily on Excel spreadsheets to track candidate pipelines and client requirements, leading to version control issues, data inconsistencies, and difficulty sharing real-time updates with stakeholders
- Search consultants store valuable candidate relationship data across personal email threads, handwritten notes, and scattered documents, making it impossible to leverage past candidate interactions for future searches or build institutional knowledge
- Client communication happens through lengthy email chains and ad-hoc status updates, causing critical context to get buried, requirements to drift, and creating constant back-and-forth about project progress and next steps
- Research and candidate sourcing starts from scratch for new search, with firms unable to systematically tap into t

Trash

Document tabs

About This Do... 1

Foundations 1

ICP

Persona

Positioning

Message House for B2B ...

Message Themes

1 Awareness Stage

2 Education Stage

3 Preference Stage

4 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.

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

Document tabs

About This Do... 1

Foundations 1

ICP

Persona

Positioning ⋮

Message House for B2B ...

Message Themes

1 Awareness Stage

2 Education Stage

3 Preference Stage

4 Intent Stage

Playbooks

eMail

LinkedIn Message Ads

BDR

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 IoT 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.

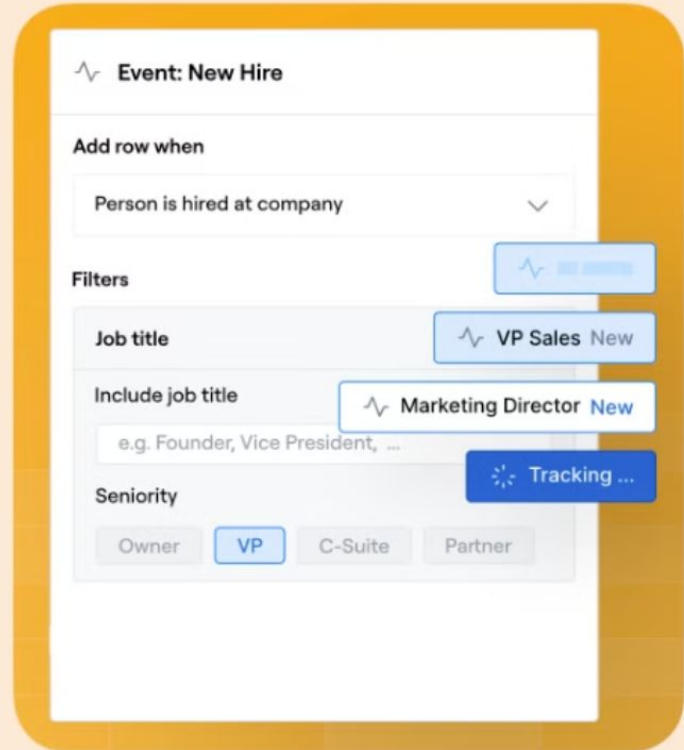


Clay Signals & Intent

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 - ???)



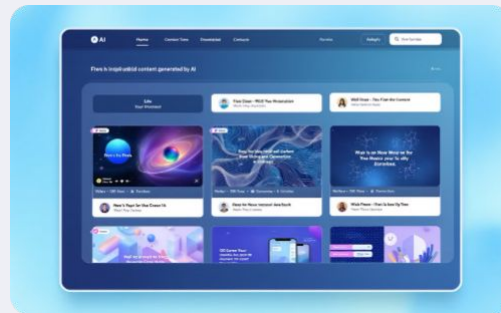
Deep Enrichment

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

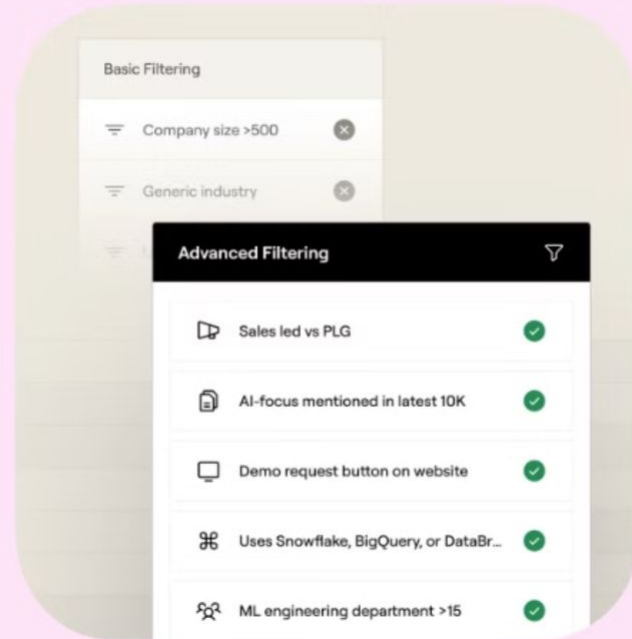
Increase prospect engagement with tools like **SendSpark**. Create highly personalized video content that automatically adapts to each prospect's industry, role, and specific challenges. Sales teams can scale their video outreach while maintaining a personal touch. This approach typically results in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

Deep Enrichment and Scoring

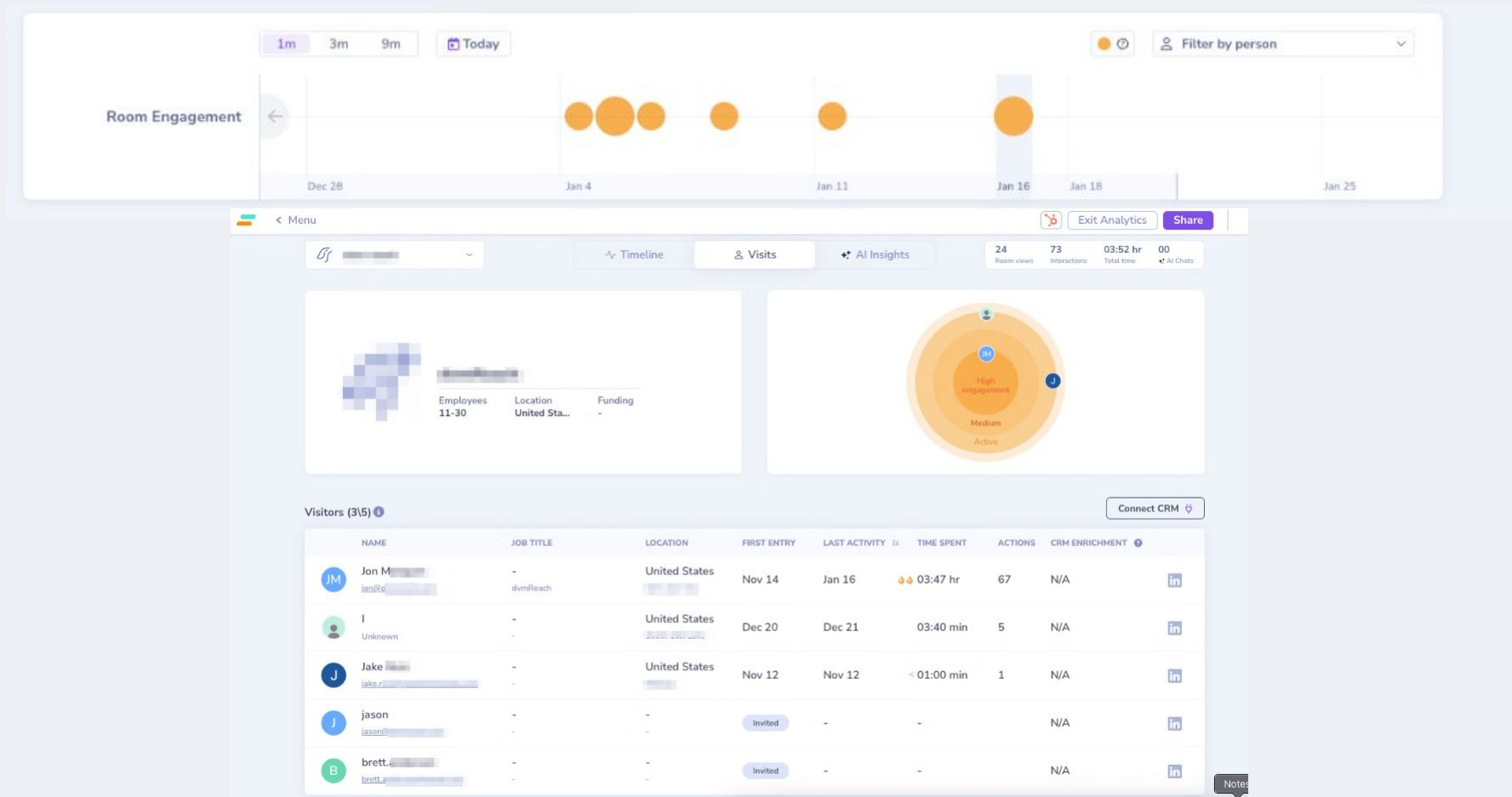
Account & Lead Scoring

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

Get started now

 **sendspark**

Use Cases ▾

Platform ▾

Resources ▾

Pricing

Demo

Sign In

Get Started

Platform ▾

Teams ▾

Resources ▾

Pricing

Get a demo

Log in

Sign up for free

Hey Brandon!



Find and connect with your new leads

Power your go-to-market strategy with personalized video. Fueled by the most accurate data, Sendspark helps you reach your target contacts and 73M companies.

Sign up for free

Get a demo

★★★★★ 4.8/5 based on 6,898 reviews | GDPR Compliant

Alissa Jones

VP of Sales @Dropbox

San Francisco, California



Excellent

Add to sequence

Day 1

Automatic Email

Day 3

Phone Call

Day 5

Connect

Email assistant

Alissa,

Glad to connect. Looks like you're growing the account management team quite a bit right now. Let's find some time to talk about your goals and how our platform

You just record one video... We'll clone your voice and tailor it to each prospect with AI









0:00







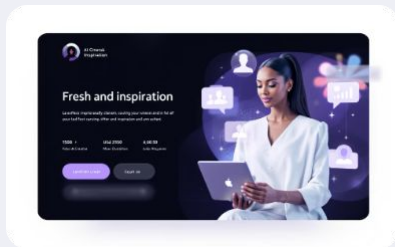


The AI-Powered Approach: Run



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

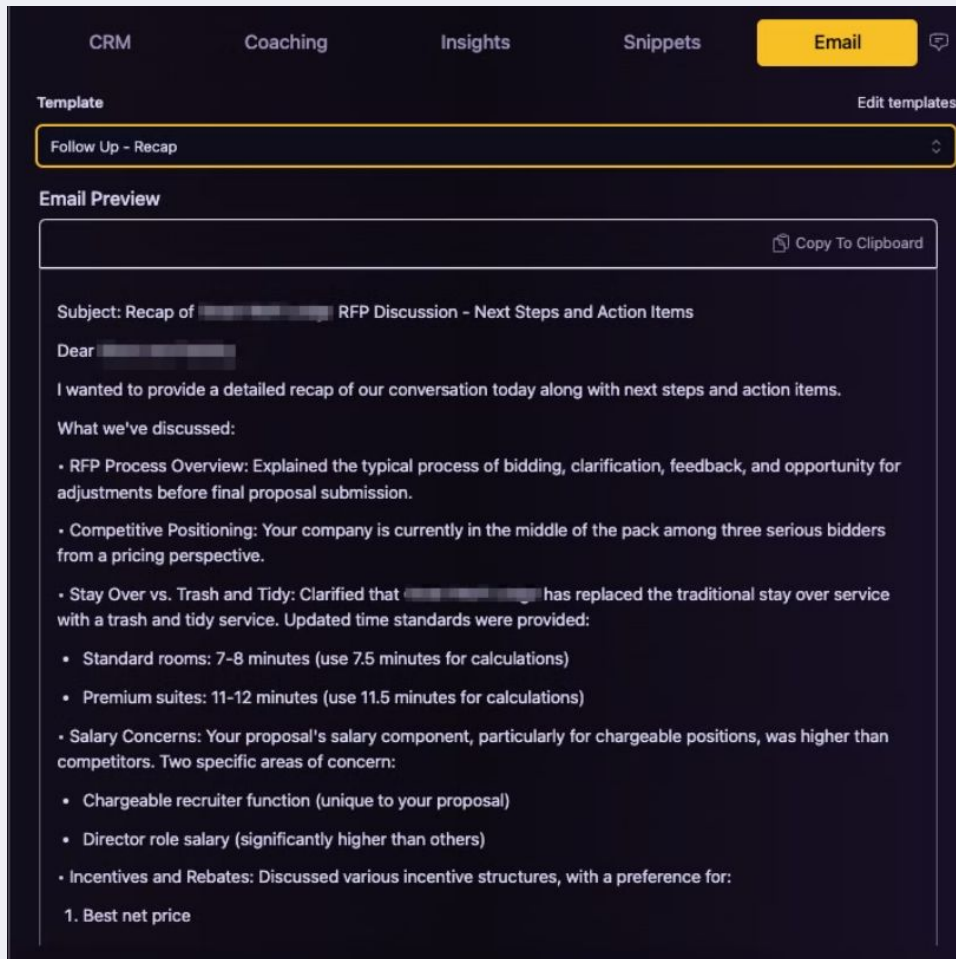
Integrated platforms like **Brandwatch** and **Pulsar** scan online sources to proactively identify messaging opportunities and market signals.



AI Content Creation

Comprehensive AI tools like [Copy.ai](#) for generating and optimizing messaging and content at scale.

Attention: One-touch Email Follow-ups



The screenshot displays a CRM interface with a top navigation bar containing 'CRM', 'Coaching', 'Insights', 'Snippets', and 'Email' (highlighted in orange). Below the navigation bar, there's a 'Template' section with a dropdown menu showing 'Follow Up - Recap' and an 'Edit templates' link. The main area is titled 'Email Preview' and contains a 'Copy To Clipboard' button. The email content is as follows:

Subject: Recap of [REDACTED] RFP Discussion - Next Steps and Action Items

Dear [REDACTED]

I wanted to provide a detailed recap of our conversation today along with next steps and action items.

What we've discussed:

- RFP Process Overview: Explained the typical process of bidding, clarification, feedback, and opportunity for adjustments before final proposal submission.
- Competitive Positioning: Your company is currently in the middle of the pack among three serious bidders from a pricing perspective.
- Stay Over vs. Trash and Tidy: Clarified that [REDACTED] has replaced the traditional stay over service with a trash and tidy service. Updated time standards were provided:
 - Standard rooms: 7-8 minutes (use 7.5 minutes for calculations)
 - Premium suites: 11-12 minutes (use 11.5 minutes for calculations)
- Salary Concerns: Your proposal's salary component, particularly for chargeable positions, was higher than competitors. Two specific areas of concern:
 - Chargeable recruiter function (unique to your proposal)
 - Director role salary (significantly higher than others)
- Incentives and Rebates: Discussed various incentive structures, with a preference for:
 1. Best net price

Comprehensive Workflows with Copy.ai

Prospecting

Deal Management

Expansion & Retention

Enablement & Training

Operations

Marketing

Other

 NEW

PROSPECT

Cold Email Sequence from LinkedIn Profile

Generates a cold outbound email sequence for a prospect based...

Try this

 NEW

PROSPECT

Analyze Latest Earnings Call

Research the latest earnings call transcript for a given public...

Try this

 NEW

PROSPECT +1

Research Private Company

Researches funding and job openings for a private company

Try this

 NEW

PROSPECT

Research Public Company

Research the priorities and goals of a public company and how...

Try this

 NEW

PROSPECT

Inbound Lead Follow Up

Enriches a prospect from their email, generates an email body...

Try this

 NEW

PROSPECT +1

Find Prospects at Company

Prospects for leads at a given company

Try this

 NEW

PROSPECT +1

Personalized Cold Outbound Email...

Generates a cold sales email given recipient and sender...

Try this

 NEW

PROSPECT +1

Research Account from Domain

Map out important details about a new prospect or existing...

Try this

Copy.ai: Automated Account Plans

The screenshot displays the Copy.ai web application interface. The top navigation bar includes a browser address bar with the URL `https://app.copy.ai/teamspace/2588117/workflows/WCFG-0faa939c-ef18-4451-850f-9ad56d682436?tab=build` and a series of tabs for different teamspaces: OM, ROS, DS/RR, TSC, GE, and others. The left sidebar contains a navigation menu with sections: Revenue Reimagined (selected), Teamspaces (General selected), AI Tools (Home, Chats), Automation (Workflows selected, Operating Systems, Workflow Library), and Assets (Infobase, Brand Voice). The main workspace is titled 'Workflows / 1. Account Intelligence (Chattr)' and features a 'Build' tab. The workflow canvas shows a vertical sequence of steps: 'Input' (yellow box), 'Configuration: Value Props' (purple box), 'Analyze Job Openings' (white box with a 'PLATINUM' badge), and 'Analyze Latest Earnings Call' (white box with a 'PLATINUM' badge'). A 'Test Workflow' button is located at the top of the canvas. At the bottom, there is a text input field with the placeholder 'Describe your workflow or add a command here' and a 'Build History' button. A status bar at the very bottom indicates 'You have 1 available seats' and includes a video player control bar.

Revenue Reimagined

Workflows / 1. Account Intelligence (Chattr)

Build Run Table API Form

Credits

Test Workflow

Input

Configuration: Value Props

Analyze Job Openings PLATINUM

Analyze Latest Earnings Call PLATINUM

You have 1 available seats

Describe your workflow or add a command here

Build History

The Future of AI in Sales

AI Agents Lead the Way

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

AI Purchasing Agents Evolve

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

Enterprise Governance Matures

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

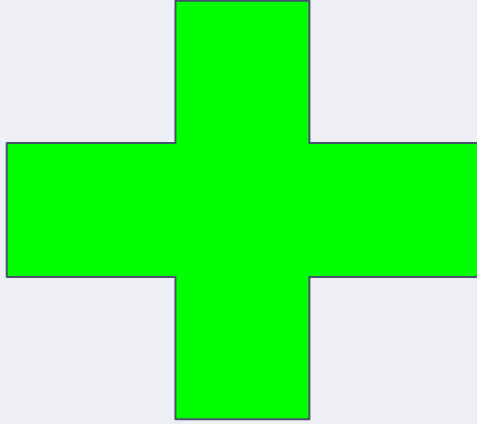
Platform Consolidation Accelerates

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

Regulatory Frameworks Emerge

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

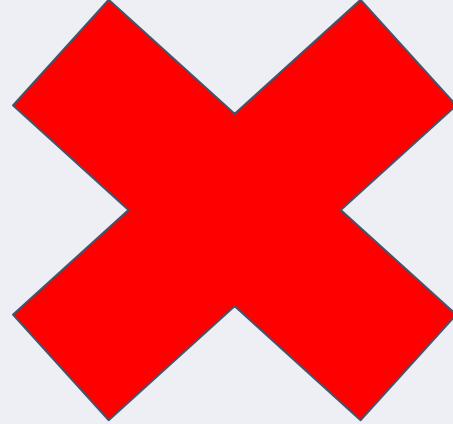
AI Do's and Don'ts



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.

3

Prioritize Human

Touch to enhance, not replace, human relationships in sales.

2

Focus on Integration

Ensure AI tools work seamlessly with your existing tech stack.

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



←

Document tabs +

- About This Do... 1
- Foundations 1
- ICP**
- Persona
- Positioning
- Message House for B2B ...
- Message Themes
 - 1 Awareness Stage
 - 2 Education Stage
 - 3 Preference Stage
 - 4 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 9-12 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.



Get In Touch:

Kevin Williams

<https://www.linkedin.com/in/kevinguywilliams/>

kevin@ascendlabs.ai



Adam Jay

<https://www.linkedin.com/in/adambjay>

adam@revenue-reimagined.com

