

Aviso Customer Demo 12.16.21

Date: Dec 16, 2021 Uploaded by: Max

Duration: 55 minutes 53 seconds

Participants(7): Max Tarasevich, Prospect, Trevor

Meeting Snapshot:

HOW WE DO IT: OUR USE CASES AND RESULTS





Forecast sales

98%+ accuracy

Accurate numbers early. By region, team, product, etc.



Identify deals that matter

2x accuracy vs humans

At-risk / upside deals. WinScores and insights



Relationship insights

300%+ new contacts

Activities and engagement. Relationship diagrams



Conversational intelligence

Save 5+ hours/week

Transcriptions, sentiment and NLP analysis. Intent for deals.



De-risk sales execution

Win rates up by 14%+

Actionable AI nudges at the right time and in context



Coach with data insights

"Clone" top 10% sellers

Reps to focus on. Rep behavior in/across deals



Improve CRM hygiene

100% activities captured

Auto capture sales activity and enrich contacts



Manage pipeline

AI-guided vs the old "3x rule"

Quality of pipeline and sufficiency of coverage



Collaborate virtually

Key Gartner sales trend

Modern digital rooms. Deal insights in one place



Take out CRM / OPEX / FTE costs

32%+ savings

Reduce spend on redundant CRM licenses, point solutions

Proprietary & Confidential

aviso

00:10:50 00:55:52 1X

Sentiment Score and Overall Trend

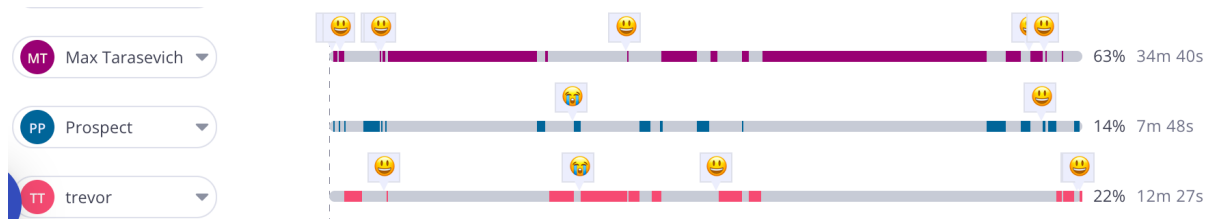
Sentiment : **Positive** ⓘ

Average Sentiment Score

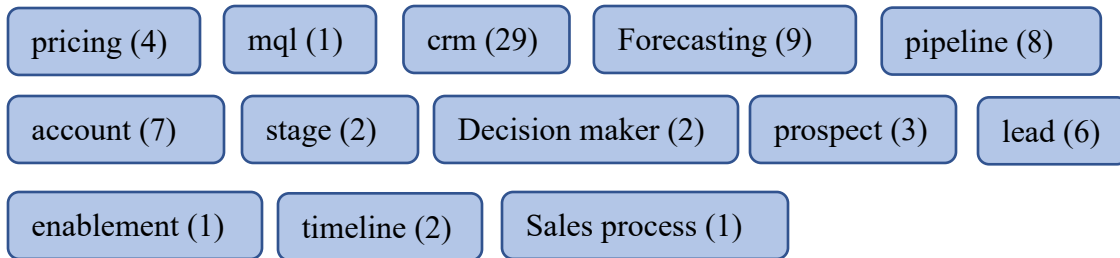
0.37



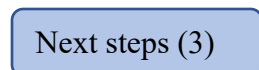
Timeline, Talk Ratio and Emotion Analysis:



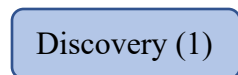
Key Words



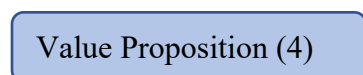
Next Steps



Discovery



Value Proposition



Technology

Architecture (4)

Customer References

Customer References (1)

Competitors

Chorus (1)

Clari (1)

Gong (2)

Einstein (1)

People AI (1)

Timing

Tomorrow (1)

Thursday (1)

Two days (1)

Next quarter (1)

Transcript Summary:

Max Tarasevich is on the West Coast in the Bay Area. It can also be used for coaching purposes. Trevor wants to reduce the CRM to a dumb database.

Prospect wants to consolidate the sales stack. Max Tarasevich talks about their collaboration tool. Trevor wanted to collaborate with Andres on a project.

Max Tarasevich wanted to show Trevor a week in the life of a sales team working with Aviso. Prospect wanted Trevor and Max Tarasevich to show him a solution to their problem. Trevor and Max Tarasevich explain to Prospect how the system learns how to improve its performance.

Trevor has better analytics and they can answer simple questions in a visual format that the end user can choose for himself. They can also answer questions with 93% accuracy.

It also shows the win and loss scores, which are related to the activities of the sales rep. Max Tarasevich and Prospect share a lot of the same philosophy when it comes to AI and sales. They want to make all the recommendations based on intelligence and they want

to service the rationale behind the recommendations and explain the explainability of the AI at the same time.

Trevor and Max Tarasevich want to partner with Froze.

Next Steps Summary:

Prospect is meeting with the Rev Ops team later this afternoon.

Action Items:

0:22:11 Trevor

So then we'll send you the output. It's pretty interesting. Once you see the output, you're going to be like, Holy shit. Maybe I should have been a little more poker faced. What's also not happening right now, but if we were doing it with an actual prospect is Max will be getting real time guidance on whether or not he was speaking too much, whether he slowed down on your facial features, whether we were resonating with you or not, your people dilation. Also, we look at stuff like cognitive dissonance toll inflection stuff like that. So those are the areas we're investing heavily in. And we're also investing heavily in stuff upstream in terms of lead routing, lead optimization intent. We don't want to be Bombora, but what we do want to do is effectively route optimize your entire lead SQL MQL process so we can optimize the whole HDR experience to watch the customer experience, etc. Does that make sense?

0:53:18 Prospect

Very good. I do apologize. I have to run two or hosting two back to back day tomorrow and Thursday of strategy work. And so I have to go to a prep meeting right now. But this has been really helpful getting me caught up. My gears are turning right now in a couple of different ways. But what I'm going to do with this is I'm going to connect with our CEO, Andreas, just to kind of talk about today's conversation. Talk about some of the notions of collaboration, what we might be able to do from a go to market standpoint where his head was at, where mine is at. But you mentioned that this call is recorded and you'll be able to share kind of the output of that and how a user might see the conversation.

0:53:59 Trevor

Yeah, we'll share that now. Obviously, users also seen stuff like computer vision based real time coaching all. We can't show that. But we can definitely show the output of the transcript. But if you go into our actual room competition room, you can see additional metrics, et cetera. Sorry, I had to jump on another call. I just came back. I don't know if you can get used to the whole. Did you show the whole conversational intelligence piece?

Call Metrics:

Talk Ratio:

Ratios of the total talk duration of the speakers



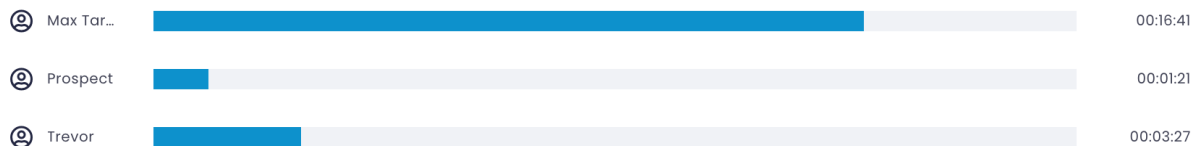
Question Rate:

Total number of questions speaker asked



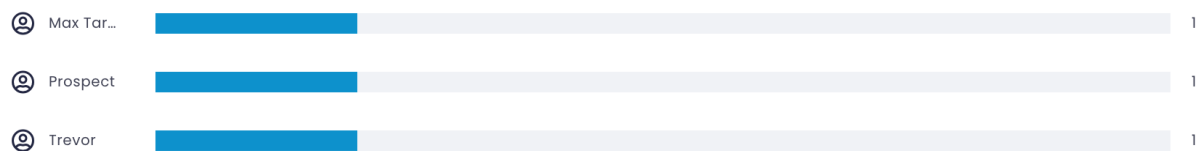
Longest Monologue:

Duration of longest monologue



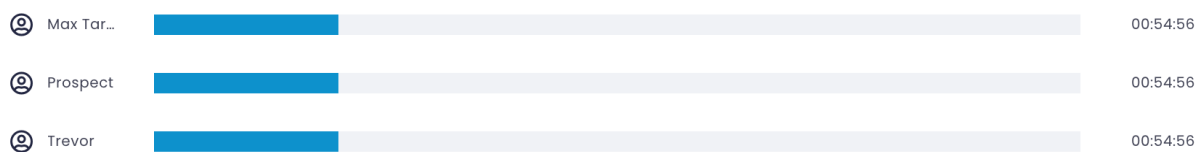
Weekly Call Volume:

Avg. number of calls speaker was present



Weekly Call Duration:

Avg. duration (in hrs) speaker was present in meetings per week



Full Transcript:

| | | |
|---------|-------------------|--|
| 0:00:17 | Trevor | Hello. |
| 0:00:18 | Prospect | Hello. |
| 0:00:18 | Max Tarasevich | Hi, Jonathan. Sorry about that. |
| 0:00:20 | Prospect | Yeah, no worries. |
| 0:00:22 | Max Tarasevich | This is Max. It's one of those things where you have Webex. One of these things doesn't work. Sorry about that. That's all right. So I was able to figure it out. |
| 0:00:40 | Prospect | No worries at all. |
| 0:00:42 | Max Tarasevich | Where are you based, Prospect? |
| 0:00:43 | Prospect | I'm based just outside of Boston, so I'm about 30 minutes, maybe about 2025 minutes west of the city. |
| 0:00:51 | Max Tarasevich | Nice. I'm on the West Coast in the Bay Area, or. Yeah, no Bay Area. And Trevor just joined. Hi, Trevor. Hey, Max. |
| 0:01:04 | Trevor | Hey, Joan. How's it going? |
| 0:01:06 | Prospect | Doing? Well, how are you? |
| 0:01:08 | Trevor | Good man. Sorry about that. One of my other reps sent out the meeting. What we have is because we use our own. So we've got security on this. So the person who starts a meeting, no one else can join if he doesn't join. Otherwise, you could have a security issue, right? Because the deal specific calls. So he's on a plane, I think, and he got his wife's cross. But we can start without Adrian Max to set some context. I spoke to Prospect CEO. I think it was last week, a week before, and Prospect and I know each other from previous life. So a small world and based the conversation with Andres, it's always a good idea for Prospect to take a look at our application. I talked about potential potential go to market fit for both companies and also both myself too, in terms of ORG using our solution as well as going to market some of their customers. And we are pitching ORG and solutions some of our customers because I think there's potential synergies over there in the same space, in |

adjacent verticals or in adjacent fields of value. Right? Is that fair? Prospect, would you like us to go through our solution? You should take a look.

You and I had last connected. I forget what year it was even, but in order opposite forest research when I worked there during that time to give you a little bit of background context. I was responsible for the research practice. Really looking at the BT sales. And I then went on to take over B to e commerce as well. So it covers the spaces of Salesforce automation, all the sales productivity effectiveness enablement kind of tools in that space at the end of 2019. At the end of 2018, I left. Forrester, moved to a late stage startup in the ecommerce base out of Vancouver called Elastica Software, ran the product organization there, but having worked at four. So I got to interact with a lot of companies and kind of knew where I'd like to end up eventually. And one of those places was Pro. So when Andreas gave me the ring, I joined in the summer of last year. So I've been here about a year and a half and I have responsibility for all things strategy. Go to market, product strategy, corporate development, you name it. It's been a little while since I've seen Aviso, so I'm looking forward to seeing it again.

0:02:34 Prospect

0:03:45 Max Tarasevich Awesome. Perfect. Yeah. How much time do you have, Prospect? I know the meeting was scheduled for 45 minutes.

0:03:51 Prospect I can go over if you need to go over. I think I just have a hard stop at three Eastern or twelve Pacific.

0:03:57 Max Tarasevich All right. Perfect. Do you want to see the system right away? Or do you want me to describe how it works? The value.

0:04:10 Prospect Maybe a couple of minutes. Just kind of overview.

0:04:13 Trevor Just do the standard page, Max, do the first call deck, and then do the wireless, do the standard pitch. Let's assume Prospect is a prospect.

0:04:22 Max Tarasevich All right, Prospect. Well, assume you're a prospect. Okay. And you probably know this. So Aviso is a company that does forecasting and guided selling, and we use AI for both of it. So AI is our DNA. If you look what it means for forecasting, you can

expect our forecast to be very accurate, like 98% plus. And that is extremely important also for the guided selling, because if you want people to be able to improve their win rates, the predictions, the recommendations need to be very accurate even at the deal level. So that's what we do. And that helps activate those insights. And it results in higher win rates. This resonates not only with companies that are very large, like Honeywell Dell. It also resonates with industries like Pharma. We also have clients in logistics and many other spaces. And it also resonates with the industry experts. So we haven't covered Bane, Wall Street Journal and others. And also it resonates with companies that are much smaller. Really, what we do is universally applicable because what we do, we learn what works or doesn't work for each company individually. So we do not cross train our engine across multiple customers. Also, to avoid any Privacy security issues. These are three examples of three different companies from different industries from different with different sales motion, different customer bases. Also, as you can see, very different size. One of them is like almost 200,000 people and one of them is 300 people. And customer B is somewhere in between. Buq stands for beginning of the quarter. This is how accurate our AI was literally on day one. You would know what you can expect at the end of the quarter with two percentage points difference. Give a day and of course, that allows people to course correct and allows us to guide them in the right direction. These are the results that our customers have demonstrated at this point. 98% accuracy for us. Table Stakes We also help accelerate revenue win rates and improve productivity of your teams and optimize your optics spend. We'll talk about it in a minute. The way the platform works is very straightforward. We would connect to the sources of data that are relevant for the use case that we're working on. Typically, this would be CRM, email, calendar, conversational intelligence. So, for example, this call is being recorded later on. Visual automatically grab it, transcribe it, run sentiment analysis, identify keywords key topics, whether we talked about next steps, whether we talked about pricing, whether you mentioned any of our competitors, things like that, they can be

important for coaching purposes, of course, but they can also be very important as additional signals for our engine. And if we are working with a renewals organization, we will also connect to the support system. For example, I'm trying to renew an **account** and it has a bunch of open tickets. Let's say other things being equal. That's probably not a good sign. So that's what we do. And then there are other systems that we connect you because we are agnostic. In this respect, we can connect to any system that has arrested most of them. After that, what happens? We bring all this data into our platform. At its core, there is a time series database, but what it does, it builds a very detailed, longitudinal view of all the signals. So over time we will collect more and more data. We will be also snapshotting all this data sources that I talked about. So we will be building a very detailed history of those signals, even if the source itself does not store this history, which happens. For example, with Salesforce. Often you don't have the history, but we will have a much more detailed picture, which, of course, will allow us to come up with richer predictions and more accurate predictions. And these predictions will take a form of what we call a nudge or recommendation. The idea is to give people a choice, explain why we're saying what we're saying and gently push them in the right direction so that they don't feel like it's a black box B. Somebody is dictating them what to do. And of course, you get the standard of the say forecast. You get the insights, reports, et cetera, and everything that I just described is persona specific. So if you're a sales rep, you get one set of insights that are specific for your business. If you're a sales manager, you get a set of insights that are specific for your organization. As a revenue leader, we will get insight for the entire business, and for all of these personas, we want to be Proactive. We don't want to make people go and search for this information. We want them to see this information proactively. That's why we multi channel. When we work with them, we'll be in your email. We can be inside your Salesforce. We can be standalone application. We can be on their phone. Doesn't really matter for us. Whatever Avenue works for you in terms of consuming data will be there, and we want to bring it practical so that you don't

need to go through multiple dashboards or reports and look for this insight. Now we want to bring what's most important for you as quickly as possible. And the last slide that I have before I show you the system, which are the most popular use cases. So forecasting, like I said, this is our DNS. That's what we're well known for. We are very flexible. We are not in Bolton to your CRM, we exist as a separate platform. Architecturally speaking gives us a lot of flexibility. So if you want your forecast by product, by territory or by team, however, you want to add a Pivot or you decided to add business like consumption driven business. For example, we can forecast all of that to me at this point. It's kind of table stake. Like I said, what we do at D level is much more impressive. Imagine that each deal, each and every deal that we touch will have a win score. Win score is not a CRM score. It's not a health score. It's not like a fit score. It's a specific probability for this deal to convert in the quarter, which means it's time bound and it's falsifiable later on. You can compare our win scores with actual win rates, and you will see that we are on average across all our customers 96% accurate, which means I know which deals have risk, which deals have upside, which deals can be accelerated. That's one of the key reasons why we're able to direct teams to the right deals to help them improve their relationship inside. So we have the concept of people graph where we capture all the relationships. Email. We look at your emails, we'll look at your calendar meetings, and we know who has been talking to home. Of course, we capture activities that's important as well, but we also measure the true level of engagement. Imagine, Prospect, I send you email an email and then you do not respond to me. So in terms of activities, I'm fine check Mark, but in terms of engagement, we're nowhere. So what we do, we capture it. We understand. And we measure a so called perfect engagement pattern so that we know what works for your company. Usually it's like something like this. I email you, you email me back, we have a meeting, then we had another meeting where you invited more people. Then we had a couple of other meetings, then proservan got involved, legal got involved. That's how I know that we are on track, and we do it for individuals, and we do it for conversational intelligence.

We already talked about it. My favorite use case is coaching with data insights and not just risky sales execution. The idea is you send this nudges to me at the right time at the right place in context, and that helps me. That creates a value exchange. I know if I use Aviso Aviso, looks at my data, then more productive with sales managers instead of asking me basic stupid questions like, okay, Max. So how is the deal with fraud going who have you been talking to? Are we still on track? What's a predicted quote, date, et cetera. My manager can see all this information in Anita, and we can have a conversation that will be hopefully more value adding and catch up questions like tell me what's going on. I'm yet to see a company that would tell me we have perfect data in CRM or elsewhere. So what we do? We capture all these activities that I talked about. We can write it back to the Salesforce or any other CRM. We are bi directional. That reduces the amount of manual data. Plus, we will auto summarize the conversations like this conversation will be auto summarized so I can look at it. And then if it makes sense, I will synchronize it with other parts of Aviso or in Salesforce. So again, I don't need to spend so much time manually typing it up. Popular question is okay, tell me how much pipeline I need and how good it is. And don't say three X, four X or whatever the old rule used to be. Give me more valuable answer. So we model how much of your pipeline will convert as plan, how much of it will be pushed out, how much of it will be created and convert next quarter? You just don't see it yet. We call it unborn by virtual collaboration have the concept of digital secure digital rooms where everybody's on the same page where you have multiple people working on the same deal. They have access to all the insights that I just talked about. There is a full history of the deal. There is no heat later on. It's easier, for example, to do hand over later on to customer success. Things like that popular use case cost take out. We do two things here. Number one, we can eliminate what I call redundant CRM licenses. So a lot of people and you probably know it better than I do. A lot of people who use CRM. They have this full price CRM licenses, but they don't really use CRM that much. They log in occasionally, they look at a couple

of dashboards. Maybe they inspect deals here and there. Maybe they'll leave a comment, but that's all. They do not create deals themselves. So we give them access to the same information in Aviso. And this is how they can save money on CRM licenses, which applies not only to small companies but also to large companies. This is how Honeywell funded their program. We eliminated hundreds and hundreds of licenses for them. And the second thing we do here is to save up. That is, theoretically, you can have a separate solution for each of these use case like you can have separate solution for conversational intelligence, for relationship insights, et cetera. When you go with the platform, you obviously save, so that's much more cost effective. Okay, let me stop here. Any questions before I show you the platform.

0:15:25 Prospect

Let me think so. There's some of this that's familiar to me from my time seeing the solution back in the day, I'm sure all of us advanced. Well, maybe if you plan on showing it, but talk to me a little bit more about this notion of the digital salesrooms with that virtual collaboration. And maybe a more provocative question, which is more philosophical than anything else, given all of the kind of tasks and responsibilities that Aviso is taking over, what do you see as the future of CRM? Right?

0:16:01 Max
Tarasevich

How much time do you have, Prospect Trevor just unmuted himself. He's going to save me. Now, look, you go.

0:16:19 Trevor

Look, we've don't want to be a CRM, if that's what you're asking. We do have our own independent database, and if we wanted to, I guess we could be. What we do is we look at ourselves an aggregator of data because we believe information is cited across the enterprise. And CRM is one source of truth through an aggregator of data, single pane of glass, and really a platform place. We provide you with a platform that aggregates data and a single pane of glass, and then does revenue intelligence on it. And that revenue intelligence includes us having three separate applications that basically pulls that data that's not readily available in all these silos, the systems of engagement, augments it and then presents it up to you in a transparent fashion. So that's really what we do. That's why

when we talk about it, you're very familiar with Clari. I'm sure you're familiar with people AI, you're familiar with Gong Chorus, and we've had about 3% growth year over year, Prospect, this year, and a large part of it is we're seeing companies more and more wanting to consolidate that sales stack. And I really have one solution as a consolidated sales tag. I'm talking more from a revenue intelligence perspective and a revenue operations perspective. I don't want to be CRM number 754, right. So you can keep your CRM. You can enjoy the experience you have, whether you want to keep using Oracle or Salesforce or whatever flavor of the month you want to have. What I'm going to do is reduce that CRM to a dumb database and essentially give you value that you've never had before. So really affect that value exchange between the employee and the enterprise, where you're actually helping someone who is being big brother watching what he's doing. Right. And you'll see that throughout that team throughout our solution. Does that make sense?

0:18:10 Prospect

Maybe the thought process going through my head was a little bit different becoming the CRM versus making it. And this is maybe a little bit too so boxy, but making the CRM obsolete more so from the standpoint of when you think about all the different capabilities you have here and elsewhere at the end of the day, what data is left from the CRM that you feel you have to consume in order to deliver the full value of your platform, we don't.

0:18:42 Trevor

Right. But then what we're not trying to do is get into a Holy grail battle with Salesforce. Look at the end of the day, we think just like you're going to forest. And as an analyst, you know this very well, we think of CRM at the dumb database. CRM used to say the Oracle, the dumb database. Well, I think it's force is turned out. I think the concept that your world lives in CRM is obsolete. We've known for a while. CRM talks with his promise with three review the customer as soon as you start basing that transit review of the customer based on the fact that all the data has to be brought into your system, you've lost the battle. If you are going to talk about 360 degree view of the customer, and you're going to say, okay, well, Salesforce, CRM, Salesforce

service, cloud Salesforce, commerce, Salesforce, whatever flavor of the month, our sources of data. And we're also going to look at your run rate revenue or your run rate system like your ERP. We're going to look at your data warehouse and accept the fact that there are going to be multiple side of the data. And guess what? That's why we bought Mule Soft and we're going to help integrate that. And guess what? Einstein algorithms don't have to depend on just CRM stages. It can also depend on CI. It can also depend on CI actual conversations happening with the customer voice of the customer. It's also based on actual email activity stuff that happens happening in ORG pricing. When you say holistically, you accept the fact that you're one of many versus the one ring to solve them all, then you won the battle and that's our message. Our message is there's no one ring to solve them all. We're a single trainer. We believe there's multiple source systems where we are as the aggregate of that information data and providing the intelligence around it. And when we see gaps in those source systems, we think the gaps are basically around forecasting and deal accuracy within the gaps around effective activity management and aggregation of data from email calendar and the intelligence associated with it. And we believe there's no effective tool for CI. I mean, obviously you could have a gong or course to assign that will aggregate that data. But we believe our solution is superior because we really go deep on NLP aspect based on analysis. Do you see what I mean? So that's who we are. We're talking about collaboration. What we've really done is while Salesforce has talked about integrating slack and having embedded it in their workflow, we've already done that. So what we have is our own collaboration tool that's kind of like it's more like a souped up team, because Web constant capability built in to do and everything. A lot of the office functionality, et cetera. And we have that as what we call deal rooms or collaborations. We have a deal room, coaching room, forecast room, collaboration rooms where you can collaborate with your customers. You can do close plans. You've got aspirational offshots in their tracking activity, AI information, all the stuff you want to pull in from Salesforce or other tools. And

it's also the hub for your CI conversations. So if I do this call we're doing right now. As soon as we're done with the call, you have the output. You'll have the output in our room, with the transcription, with the metrics, the sales metrics, the guidance, the sentiment we have on the call guidance in your conversation, subject to the conversation we'll send you the output. I'm assuming you're using CRM. This, right?

0:22:09 Max
Tarasevich

Yes. It's being recorded. Yeah. Okay.

0:22:11 Trevor

Great.

0:22:11 Max
Tarasevich

Yeah.

0:22:11 Trevor

So then we'll send you the output. It's pretty interesting. Once you see the output, you're going to be like, Holy shit. Maybe I should have been a little more poker faced. What's also not happening right now, but if we were doing it with an actual prospect is Max will be getting real time guidance on whether or not he was speaking too much, whether he slowed down on your facial features, whether we were resonating with you or not, your people dilation. Also, we look at stuff like cognitive dissonance toll inflection stuff like that. So those are the areas we're investing heavily in. And we're also investing heavily in stuff upstream in terms of lead routing, lead optimization intent. We don't want to be Bombora, but what we do want to do is effectively route optimize your entire lead SQL MQL process so we can optimize the whole HDR experience to watch the customer experience, etc. Does that make sense?

0:23:03 Prospect

Absolutely. I'm tracking all the way and just to kind of tip my hand a little bit. The reason why the collaborator kind of stood up to me. I saw the predictions report. I read it. I actually thought that was the most poignant point in the entire report. In the way that we're also thinking about it, too is from the world that we live in specifically and quoting, quoting and B to B has historically been, well, let's go over my needs. A rep will kind of put together what they think the appropriate solution fit is. I'll add those items to quote, and we think that world is rather archaic. And we believe in a world where B to B actually

0:23:54 Trevor

looks a whole lot more like Instacart than a bi directional manipulation of the quote and being solution.

That's why I wanted to collaborate with you. That's what I pitched, Andres. So you just did my pitch for me. That is exactly what I pitched, Andres. I said, look, you can't do clothing in a vacuum. It's a collaborative thing, and it's like you've got your deal desk, folks. You've got your approval if you can have it all day with complete transparency and share that back and forth. You can have a more effective and seamless process. Right. And at some point in time, you may want to call your attorney in. You may want to call the customer in and do a negotiation call, run the sentiment analysis and come back with that and change the price and forth. But it's all got to be the collateral atmosphere. We are tracking the changes, etc. Etc. But that's where I see the value. But why don't we show you this solution?

0:24:33 Prospect

Let's do it.

0:24:34 Trevor

And then we can go from there, Prospect. Right. So why don't you jump right in?

0:24:38 Max
Tarasevich

All right.

0:24:39 Trevor

That was beautiful, Prospect, you can do my pitch for me.

0:24:43 Max
Tarasevich

Perfect. Okay. What I would like to show you, Prospect, is a so called week in the life of a sales team with Aviso. We typically start with so called Weekly Compass. It's an email that we send to different personas sales reps sales leaders, usually in the afternoon or on a Sunday evening. The idea is to give you the insights that you need for the week ahead of you. And this Compass is always persona specifics, and it's tailored to your role in the organization. So in this case, let's say I got my email. I know how my team is doing. So what we are expected, the number we expected to hit. Remember, Aviso is 98% plus accurate when it comes to forecast. So I know if I'm below pace or if my forecast is below plan. That's a big red flag. Also, let me know if there are any red flags with my forecast based on internal conversations that the team had during forecasting calls or based on any signals that it costs for the largest deals.

And of course, if I want to look at my forecast by product by territory, however, I want to do it, I will see that will also explain itself. So visit will tell me why it's forecasting the numbers forecasting so that I get a better sense of where the numbers are coming from, and I will be testing this number better. Then we will show you things like activity metrics for top three accounts. And by the way, all of this is configurable for some organizations. They only want the headline headlines for some organizations. They want more data so we can balance it depending on your needs. In this case, if I'm a detailed, data oriented person, I want to know what's going on with my biggest, most important **account** and not necessarily the biggest and not necessarily the ones that have the highest risk. It's kind of a balance they will make or break my quarter. So that's what the Aviso helps me with activity metrics, emails, meetings, executive site, next steps discuss things like that CI metrics. I want to know if my top deals have good sentiment scores or if the key decision makers have been engaged or not how my team is doing, who needs help, coaching wise and who is doing great. So that if I need to prioritize my and I always do, I know whom to focus on and what to discuss. This tells me what to focus on so that I can be again prepared, better prepared for the conversation.

When you think about things, just to kind of get an understanding of how much kind of gets configured versus how much the system purely learns organically. When you think about things like involvement in the deal, let's give you an example for us. When we are selling our purely the **pricing** solutions. We engage with everyone from **pricing** analysts to directors and VPs, all with CFO. When we engage with the CFO or when they're involved in the deal cycle, the likelihood of us winning is significantly higher. Now, we haven't actually quantified that ourselves. But that's what we see largely anecdotally there when you're working with a new customer. Is that part of the configuration process where you say, hey, this is something that we see, look out for it. Or is this something that the system would just kind of learn over time based on people

0:27:15 Prospect

0:28:17 Max
Tarasevich

who are invited to meetings like this or whatever it might be where you start to glean those trends, right?

I was going to say the same thing. So it's both. On the one hand, we prefer to eliminate human bias. So we want the system to learn itself. We want to know what actually works with doesn't work. On the other hand, if you do have any perspective like this, it might be also things like, oh, I have a cell methodology, and I think this specific aspect of matrix, it really is important to know who the competitor is or it's really important for us to identify paint one, whatever. So if that's what you want to emphasize for us, make sure that we do look at it from the modeling perspective. We will take it into **account** as well.

0:28:52 Trevor

Take your **account**, and we'll quickly validate your assumption. Prospect, is where I'm going, right. It's all configurable. You can say place extra emphasis on this versus the other track this versus the other. And we're talking about stuff you can do in ours, not days, literally. Whatever we're showing you, we can configure an hour, not days, right? It's not a big lift for us. It's just a question of priority. But if you say, hey, on the model, I want to place more emphasis on this than that. For example, we ask you when we're doing sentiment analysis with a list of all your competitors, give us a list of standard key objections. Give us a list of your standard messaging so we can tell you if your reps being effective. The conversations we are looking for are not just tells them whether you're going to win the deal or not. What we want to see is good sales hygiene, good **sales process**, because at the end of the day. I strongly believe that if you do everything right, good things happen and you having Bluebirds is not good things happen. It is good things happen for your Commission check once in a while.

0:29:50 spk_UNK

Right.

0:29:50 Trevor

So we look for that. And it's very easy for us like this conversation you're having, right? When we send you the sentiment and all, you're going to be like, wow, this is really interesting. This is what these guys were seeing right now. We're getting way more sophisticated at the end of this month with aspect based sentiment analysis, where we can actually

0:30:36 Max
Tarasevich

center on certain words that you suddenly showed interest in. Obviously, if you were speaking or certain themes, that's huge in discovery, because you can basically uncover whether or not the guys bullshit you or it's focusing elsewhere. You are what I'm saying, because people are not very transferring. Plus, in negotiation, you can quickly figure out whether this is real or not or someone's screwing with you. Right. If the sign is explained, does that make sense?

Absolutely right. And look, my preference as a sales leader is or a sales rep. I want to talk to Aisle. I can use voice assistant so I can ask questions about my pipeline. I can ask questions about my forecast, I can ask questions about how my team is doing. Again, if my preference is not to read off of the screen, I can use this channel. Like I said, we are multi channel when it comes to working with end users. Every person is different. So some people prefer this channel. Some people actually like reading reports.

0:31:06 Trevor

Yeah, I know. What we've done is while we give you, like, 40 50 reports, templates, dashboards. So as an operations person, you can go complete equal on it. What we do is we've got what's called better analytics can do very much like Start Spot. Now, I will tell you we're not as good as task because they're a lot prettier than us. But we have embedded analytics where you just type a simple question and you'll get the answer in a visual format that you can choose for yourself. As an end user, you don't have to be an admin or anything, or you can just ask for a simple summary. So literally, you can ask questions from Aviso. And as long as that data exists in Aviso or one of the source systems that are Aviso access, we'll give you that question and we've got about a 93% accuracy rate on that, which is pretty impressive because that's more accurate than thought spot, but that's what thought was stuff because that's their whole life. Prospect is a little prettier than us. I mean, the colors and all the gradients and all that ours are like, kind of out of the box, right. Makes sense.

0:32:07 Max
Tarasevich

But it's still pretty, as you will see for reps, what is important. It's important for them to know which meetings they have and

how strong your relationship is with the person or with the people that they are meeting with. We have this engagement score, which is what you're seeing here. B plus A, that's what I talked about when we understand the ideal engagement pattern. And for example, in your case, it might be true that CFO unless CFO is engaged, the level of the strength of the relationship is not where it needs to be. It doesn't mean the deal is gone. It just means it's probably not as strong as you think. Deal Insights I'm trying to renew someone. It has a bunch of open tickets in Zen desk. Or maybe there are some other risk signals. So visit will alert me. Visit will also tell me which deals have upside explain itself. Visit will tell me how I'm doing in terms of engaging senior stakeholders, people from multiple functions. For many companies, it's important that they are not only focused on one person or one function. In fact, everybody knows do not be single threaded. And yet this is the most common risk that we see across multiple clients. In this case, it tells me, hey, well, speaking of CFO, your engagement with CFO is dropping or your engagement level with the product manager is nonexistent. And it's really important that this persona is engaged. Turns out someone else from my team, CSM, in this case, has a better relationship with Ray. So maybe my CSM can reintroduce me to Ray so that I can continue making progress with my team. So all these insights will be delivered to you on a Sunday evening together with other insights like CI insights from the top deals. For example, we don't want to overwhelm you and make you do something right now. We just want to make sure you are prepared for the week ahead of you, and then we will help you with everything else as you go. So let's say during the week, I'm a manager. This is my dashboard. I know how the team is doing, who is best performing, who is struggling. I know where we are in terms of activities. I know where we are in terms of executive engagement, and I know who is also struggling and what exactly they are struggling on before I talk to them and offer my help, I want to know what exactly they have been working on. So let's pick Regina. This is the deal she has been working on. I get the win scores. I get the engagement scores. I can see the activities to Trevor's point. If you do the

right thing, the results will happen. I don't need to talk to Regina about all this. I believe it has generated all of it automatically. For me. Let's say one of the deals caught my attention. I want to understand what Regina has been doing with this deal. Well, here is a wind score history. Okay, it's actually looking promising. It's trending upwards. These are the explanations behind the wind score, so I know which factors contributed to the wind score. I know where these deals stands relative to similar deals, so that helps me calibrate this deal. I can also look at the **timeline** for this deal, so I know what booking **timeline** Aviso predicts for this deal. I also get the owner inside. So I know how Regina tends to behave as a sales rep across multiple deals, and this could be things like she tends to get stuck in a certain stage and therefore she might need help negotiating or she actually has difficulty closing this type of deals with this product or with this competitor, or she is not being accurate with her forecast. She's being a centrebacker for this kind of deals, or she's overly enthusiastic. So I know everything there is to know about her behavior. And again, it helps me calibrate what she will be potentially telling me about this deal, and I can make my own mind whether this deal is on track or not. And of course, engagement, overtime activities over time. All of it will be in one place for me. Let's say I want to understand specifically which relationships Regina has been working on. This is a relationship diagram, but it is built automatically. It's not aspirational it's factual. Oftentimes when people talk about **account** planning, they do on the first step like, oh, we want to touch 15 people. But then where are we exactly here. You have to rely on this objective judgment of reps. In this case, that's what Aviso does for me. It eliminates this bias. It's all objective. This is my key **decision maker**. I can see how she is connected to my team. My team is on the left and I can see the level of engagement at this point in time, I can see the level of engagement over time. In this case, it kind of went down. Not a good thing. I can see the latest activities, number of emails, number of meetings, everything, and where we stand relative to our ideal pattern. So to say. And then I can also see what exactly Regina and Irene, the key **decision maker**, have been doing in

terms of specific emails, a number of emails, and then specific emails. If we have access to email body, we can do the same thing that Trevor just talked about for CI or calls, but we can apply it to text. So we can also see sentiment. We can see whether they talked about next steps, whether Irene was upset or engaged, disengaged things like that objections. We can capture all that. That's the beauty of the platform. You can use similar models and you will get richer insights. This is a deal room that seven people are part of, so seven people are working on this deal. It's a team sport. We will see materials like proposals, page order forms. There would be comments from product team. Maybe they would be most important emails shared here. People will be discussing strategies will be a full history of the deal later on. Everybody is clear on who said what, who promised what and where we are. As a manager, I don't need to talk to Regina to see what has been going on. I can jump right in after I have learned everything that has been going on and hopefully add a comment that would be actually helpful. And that's what I do. Maybe I will share a case study or maybe I'll share just a piece of advice for her then conversational intelligence. This is what Trevor already talked about. This meeting is a perfect example, so it's being recorded after the meeting. Aviso will grab the recording automatically and we'll do it magic. You can also use Aviso, by the way, with other systems like Teams, or you can run calls from Aviso if you want to. It doesn't really matter. We just need the recording so that we can process it. So let's say you start the call. You will get this insights about the level of engagement of participants you'll get on cue during the call, you will get on cue hints as to on call queues and hints. Hey, Max are talking too much. Don't forget about next steps. Things like that after the call is over. Of course I can listen to it again, but to me, what is more important? The transcript, the key topics and the auto summary. So I'll get the auto summary from my Aviso. I will share the auto summary for this call with you. I can make changes if I want to, when I can synchronize it, let's say, with my Salesforce or elsewhere in a visual so that I don't need to do it manually and I don't need to type everything from scratch. Everyone has helped me with

that. I will see the sentiment indicator. I will see the sentiment score. I will see topics like intent, and we are also adding aspect specific sentiment. Whichever explained. We are different here in the sense that we are not only capturing what people said directly like, hey, next steps would be this and that we're also looking for things that would indicate intent, even though I did not specifically say things like next steps. For example, if I say I will follow up with you next week, that is the next step from the intent perspective, but I didn't say next steps specifically, so these will capture that as well. These transcripts can very, very smart and can be extremely helpful. Of course I can leave my comments. I can navigate based on sentiment. I can also share the recording and the transcription with external parties or internally. I suppose you asked me a question right now. I'm not sure how to respond. My solution engineer Allen can potentially help me better with that. So I can cut this section of the call where you ask me the question and then I will send it to Alan. Hopefully Alan will be able to help me. He doesn't need to listen to the entire conversation. That's what you can do with individual calls. But of course, since we are recording multiple calls, what we will do, we will generate a library of conversations, and this library can be rep specific or deal specific. However you want to look at it, you will see the key ratios like, for example, talk ratio or question ratio, how many questions were asked, things like that so that you will know what works for your business. And over time you also will know, for example, what's the ideal number of questions for discovery calls, things like that. So you can also see this as part of the deal insights that I talked about this way. You know what Rep wants you to know from CRM. You know what actually has been going on with the deal from email calendar. And you can see what people have been talking about, the email body or the recorded conversations. Now let's say okay, I have some time to do some coaching. So, Regina, she needs some help. I know what's going on with one deal. I just inspected it. But what I'm not necessarily aware of is how she's doing across multiple deals. One of her behaviors and tendencies will help me with that. And this is our coaching room. It's similar to deal rooms, same concept. It's just

one on one for me in Virginia. So it's a digital room, same thing. We can run video calls if you want to from here or share materials, et cetera. Aviso will tell me how we are doing, how she is doing in terms of serum hygiene, sales efficiency, stress of relationship. She has stagnant deals in her pipeline. Pipeline is not big enough or she has too much risk. What's going on in terms of CI metrics across multiple deals, how she handles objections, or if there are certain aspects where the sentiment tends to be negative. If there are certain aspects where the sentiment tends to be positive or things like that again, I will come much more prepared for this conversation and then, of course, forecasting and individual deal reviews. It will give me all the insights. I will have a landing page that gives me personal highlights of how my business is going.

0:43:11 spk_UNK

Again.

It depends on my appetite for reports, data, et cetera. I can have the most important metrics on this landing page. If I want to run a forecast role, Aviso will be able to give me all the information that I need for that typically, and I can do it by industry, of course, by team, by product. However, we want to do it because we are very flexible in this respect. Typically, there are four numbers that people are interested in. What's my goal? What's my target? How much have we booked so far? What is our visual forecast? What is my team's forecast, and then you can start comparing these numbers. You can compare it numbers for individual regions. For example, if you're doing by region or you can do it by industry, etc. Track. And what happens is over time. People know this is very accurate. So for example, in this case for Asia Pacific, my team tells me expect 15,000,001 five. AAviso tells me no, it's going to be more like 10 million. That's a \$5 gap for me. I know it's 98% plus accurate. Okay, I want to understand where the gap is coming from, but maybe before I go into individual deals in this region, I want to look at some metrics like performance metrics for this region, or maybe some questions that can help me understand how we're doing with the pipeline, whether we have the right mix things like that, but maybe I want to look. Okay, where is your number

0:43:11 Max
Tarasevich

coming from? You show me explanations behind this number. All that will help me be prepared to look at individual deals. And then I can look at individual deals where I will get engagement scores. I will get the win scores. I can filter the deals. I can search deals. If we do deal level forecasting, I will know which deals are in forecast, which deals are not in forecasts things like that. So I will have too much information if I wanted to spend the entire call just here. I could do that. But the best part of it is it will show me where to focus on. So for example, for wind scores, it will tell me what's behind it. What's the history of the wind score? So I can focus on the deals that actually matter for this forecast. So it will tell me which deals are potentially going to make or break my quarter. So I don't need to inspect all deals manually. That's what I like about the Aviso, and it will give me all the insights about individual deals that we just talked about. So that can be very helpful to me. My preference is I love the following view much better than the table view. I love the so called deal map view. So this is a two by two matrix, a visual judgment, human judgment. The idea is if both sides agree, it's a great deal and I don't need to worry about it. But if Aviso thinks deals at risk and my team has it in forecast, then it's potential gap in my forecast and the other way around thinks it's a good deal, but it's not in my team's forecast. It's an upside deal. So usually for the atrisk deals, we'll talk mitigation strategies for the upside deals, you will talk different place, how to bring them in. Also, they will show me which deals can be potential accelerate. So this way, I don't need to look at every deal. I can just focus on the deals that matter most. So to me that is a very cool feature because it allows me to save time and my team as well. Of course, you'll see a lot of different reports that Trevor talked about. For example, a popular question is, okay, what's changed in my pipeline since yesterday or the day before yesterday or since two days? Whatever. So we had 200 deals and commit how many we end up losing, winning, pushing out things like that. So you will be able to see all of that pipeline quality, turn, risk, deal prioritization based on activity and win scores, et cetera, et cetera. And then during the week, using all this insights I visit will be pinging my team and me and saying,

hey, Max, for example, you have this deal, it's in forecast, but it has too much risk on it. Are you sure you want to keep it in forecast? And I can say, yeah, I can override it's. Not a problem, but at least it alerted me. Another example could be okay. So you're talking to someone from Pros, but they're not in your CRM. You want them to be added to your serum, and I can say yes so that I don't need to do it manually. Or we can actually do it automatically. Depends on how you want us to be set up. Or let's say, Prospect, if somebody moves and I want to be alerted when someone moves, so that not only can I keep my CRM data up to date, but more importantly, maybe there is an opportunity for me in a different company, things like that or cross sell upsell, product bundle recommendations. They can be very powerful as well, so that can be an important nudge. And another example could be, let's say I'm a manager. I'm responsible for a set of accounts. So if there is a true risk, I want to know and that's what Aviso will alert me to. There are many other matches. This is just select examples. Another way of using Aviso on the phone is submitting your forecast. You can accept the forecast from your team, or you can override it and exercise your judgment and submit whatever number you think makes sense. And then your manager can do the same thing. So all these notifications, they will live in the notification center, so you know where you can find them. All right. So that's it. That was a short demo. Any questions?

0:48:48 Prospect

Yeah, maybe just one general one. So I think we share a lot of the same philosophies when it comes time to AI and sales, where we want to make all the recommendations that we can based on intelligence. We want to service the rationale behind the recommendations or the explainability of the AI. At the same time, we're not trying to provide a doom and gloom story where salespeople are going away and everything's going to be done by machines in the future. So we do like to give control back to the users, can you talk to me a little bit about that portion or not portion, but that kind of capability set within the platform, maybe how you store data when a manual user does override or recommendation or go against it? Are you able to kind of track? I guess the way we kind of think about it is it's a

0:50:10

Max
Tarasevich

flavor of adoption for us. So when we do things like price recommendations or cross all up sell recommendations, things of that nature, we can track how frequently the user is actually accepting those versus rejecting them and then use that as kind of another kind of coaching or customer value lever that we could pull on with our accounts and say, hey, well, you would have seen better results. Have you followed these recommendations because the folks that did see those results?

Yes, we have a similar match. For example, Max, someone on your team is struggling to perform, and they have been ignoring nudges. So that can be coaching conversation for you to have.

Also, when it comes to people's judgment, we want to same thing. We want to capture both. We want to capture their judgment, and we want to be able to exercise our judgment independently. So when it comes to individual deals, we will capture judgments of different personas from a product perspective. Let's product function. I think this deal is not going to go through. As a key **account** manager, I might think, well, it's actually going to go through right. Two different judgments. And then our managers can have a different perspective on it as well. So we'll be able to capture all of that, and then they will be in parallel to say, they will be in Aviso judgment of this deal, which will be independent from all these judgments, it will take them into **account**, but it will not be directly derived from those judgments. You will see everything in Aviso. So if you do deal level forecasting, you will be able to see all those judgments. But it doesn't mean you have to change your judgment based on Aviso or the other parallel tracks. We augment human decision making. We do not replace humans, got it.

0:51:23 Prospect

And then the other side of it, which is, I guess, more kind of on the development engineering, technical side of it is out of all of the AI machine learning capabilities that you have. How much of that is proprietary versus, let's say, consumable service from, say, like a cloud platform, like you showed a couple of things in there, whether it's natural language processing, whether it's computer vision, how much of that stuff is built from the

0:52:03 Max
Tarasevich

ground up in house versus leveraging, let's say, hypothetically speaking, Google's computer vision service.

Like two thirds of it, is proprietary. We use some basic services that are out of the box available on the market. But this has been become a commodity. I'd say just generating a transcript by itself is no longer. That impressive. You can have, like you said, Google, Amazon, Microsoft. They can do it for free. The real question is, what do you do with this data? This is the aspect specific sentiment analysis. This is how you derive the topics keywords, how you link it to individual deals, and then how you link it to my behavior as a sales rep. That's where the secret sauce is. And we have to give you a sense of where we are. We have 30 plus data scientists in the vision out of, like, 150 in total, 150 employees in total. That tells you where our focus is. Cool.

0:52:58 Prospect

Yeah, we have more data scientists, but we've got a lot more people in total. So our ratio, we may have more data scientists. Our ratio might actually be less, right?

0:53:10 Max
Tarasevich

No, that's our DNA. Like I said, AI is our email. We started with this premise. That's why we're different.

0:53:18 Prospect

Very good. I do apologize. I have to run two or hosting two back to back day tomorrow and Thursday of strategy work. And so I have to go to a prep meeting right now. But this has been really helpful getting me caught up. My gears are turning right now in a couple of different ways. But what I'm going to do with this is I'm going to connect with our CEO, Andreas, just to kind of talk about today's conversation. Talk about some of the notions of collaboration, what we might be able to do from a go to market standpoint where his head was at, where mine is at. But you mentioned that this call is recorded and you'll be able to share kind of the output of that and how a user might see the conversation.

0:53:59 Trevor

Yeah, we'll share that now. Obviously, users also seen stuff like computer vision based real time coaching all. We can't show that. But we can definitely show the output of the transcript. But if you go into our actual room competition room, you can see additional metrics, et cetera. Sorry, I had to jump on

another call. I just came back. I don't know if you can get used to the whole. Did you show the whole conversational intelligence piece?

0:54:24 Max
Tarasevich

We went through the entire Willow.

Yes, you did. Okay. Excellent. I think you get a flavor. It gets pretty detailed on the CIP, but we'll send you the output. It's about 80% of what you'd actually see in the application, but that should be sufficient. Where I'll leave you with Prospect is one, of course. Yes. I mean, I think it's great you're going to go back to Andres. And obviously, you know the space better than 99% of the people we face to having been an analyst who is intimately aware of what we do. I think it would be very beneficial for us if we could also engage with your internal operations team. I think if you were able to experience this first hand, you could see the value we could drive. But definitely the initial emphasis and impetus for this conversation was our desire to partner with the company or the caliber of froze. And I think we can both add a lot of value to our existing and prospective customer base. That makes sense.

0:54:26 Trevor

0:55:16 Prospect

Yeah.

0:55:16 Trevor

Absolutely.

So actually, not this next season. I'm going to with the one right afterwards ahead of the strategy session. There's a lot from the go to market standpoint how we're executing. And there's a lot of data. So my meeting with our head of Rev. Ops, or VP of Rev. Ops is later this afternoon because we've got to get more insight for these conversations.

0:55:17 Prospect

0:55:40 Trevor

Prospect Pleasure as always, I'm Andreas is lucky to have someone in the team, so I need more people like you.

0:55:47 Max
Tarasevich

But take care. Thank you, Prospect. Bye.