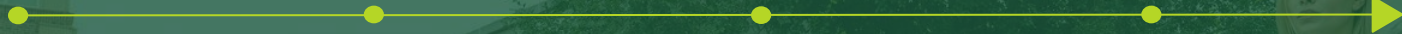


# Sales Engagement Technology: The Future is Now

Ellie Fields  
Chief Product Officer, Salesloft

 [@salesloft](https://twitter.com/salesloft)

# The Evolution of Sales



2005

Cloud Migration



Cloud based CRMs power Marketing Automation

2010

Channel Expansion



Sellers and buyers embrace social, text, dialers, and more

2015

Sales Tech Innovation



Siloed point solutions that fill specific needs flood the market

2020

Digital Shift



Sales suddenly pivots entirely online

More data  
More tools  
More channels  
More **noise**

# The Modern Revenue Workspace™

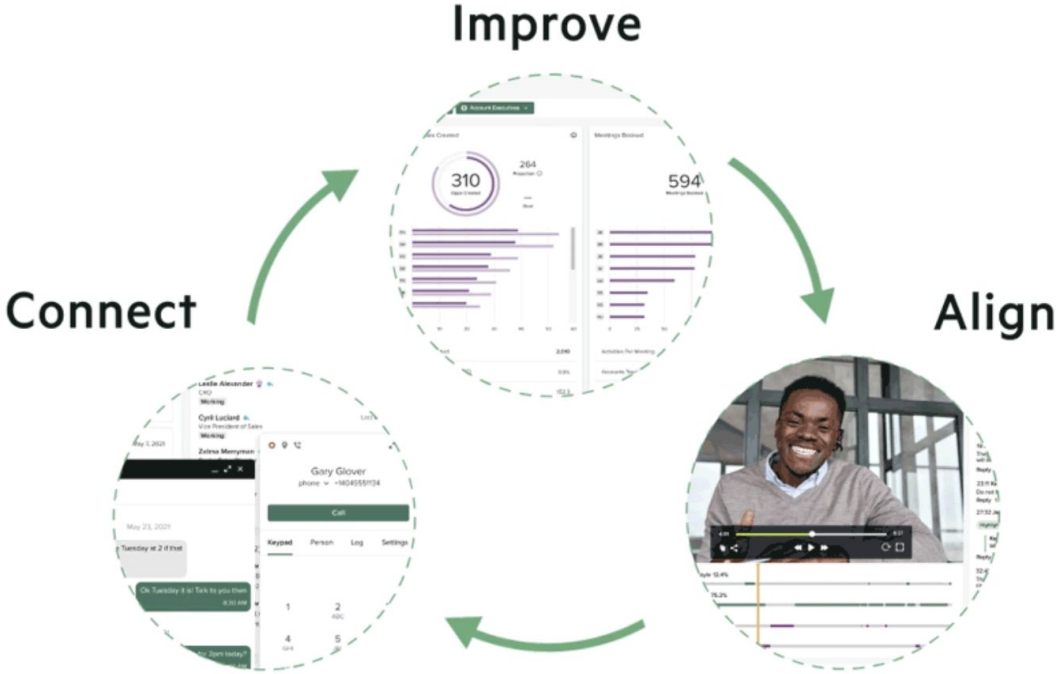
-

All your critical sales capabilities integrated in a single intelligent platform.

# The Modern Revenue Workspace™

All your critical sales capabilities integrated in a single intelligent platform.

Enterprise ready.



Enterprise Readiness

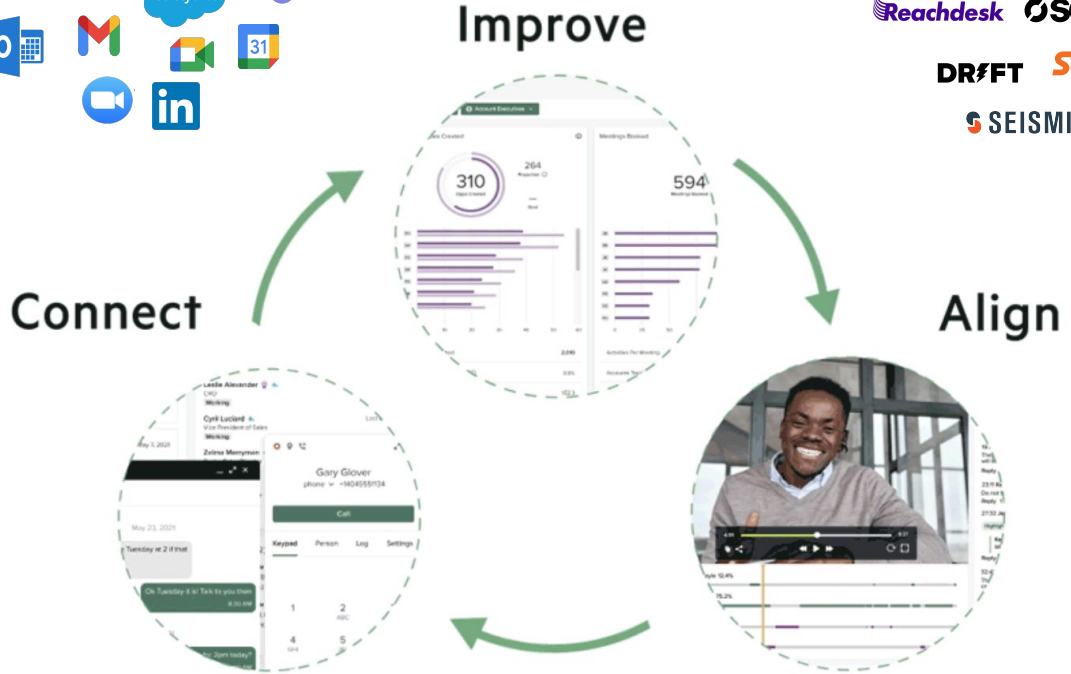


# The Modern Revenue Workspace™

All your critical sales capabilities integrated in a single intelligent platform.

Enterprise ready.

Integrated with the ecosystem.



**Enterprise Readiness**

# Integrated Workflows

Conversations, Deals, and Cadence, with everything right where you need it.

- **Conversations everywhere.** Access recordings from People, Account, and Deal Activity Timelines.
- **Engage from Deals.** One-off call, email, text, and book meetings. All from Deals.
- **Meeting no-shows.** Immediately action no-shows from the new meetings panel.

The screenshot displays the Salesloft interface with four main panels:

- Live Call Studio:** Includes a "Launch" button and the text "Live listen, coach team or join call."
- Live Feed:** A list of recent activities, such as "Floyd Miles | OLS left a 0:48 voicemail 16m ago" and "Robert Fox | Audiomatic Artist Services replied to Automatic intro discussion 42m ago".
- Cadences:** A table showing automated sequences.
 

Group by:	Type:	Total	Calls	Emails	Other	Integration
Q32021 Personalized (45)	Team Cadence	158	28	114	16	8

Below the table, steps for "Q32021 Personalized" are listed with "Add People" buttons and due dates:

  - Research + Data Integrity (Day 1: Step 1) - 6 Due
  - Day 1 Call (Day 1: Step 2) - 1 Due
  - Personalized Email (Day 1: Step 3) - 6 Due
  - The Great (Q12021 best of) (Day 2: Step 4) - 6 Due
  - Call /wo VM (Day 3: Step 6) - 2 Due
  - Call /w VM (Day 3: Step 7) - 11 Due
  - Vidyard (day 2 in thread) (Day 5: Step 8) - 6 Due
  - AM Call (Day 6: Step 9) - 11 Due
  - What we've been through (Day 11: Step 14) - 6 Due
- Meetings:** A calendar view for "6 - 12 Sep, 2021 (UTC+3:00)".
  - Tuesday, 8 Sep:**
    - Intro Call: Gary Glover | Wavelink (2 guests • 1 yes, 1 no) - 11:00 AM to 11:30 AM
    - Kevin + Kristin: Kristin Walls | New Horizon Systems (2 guests • 1 yes, 1 awaiting) - 12:00 PM to 1:30 PM
    - Newcomers' Onboarding Meeting: Callie Palmer | Audiomatic (71 guests • 40 yes, 12 no, 5 maybe, 24 awaiting) - 2:00 PM to 3:00 PM
  - Wednesday, 9 Sep:**
    - Intro Call: Christopher Wilkinson | OMO (5 guests • 3 yes, 1 no, 1 maybe) - 3:00 PM to 3:30 PM
    - Kevin + Alex: Alex Turner | Terratam (2 guests • 1 yes, 1 awaiting) - 3:30 PM to 4:30 PM
    - Kevin + Macy: Macy Dalton | Freight Forward LLC - 5:00 PM to 6:30 PM

# Enterprise Governance

Reps are living swivel-chair, cut-and-paste workflows.

And that takes away from selling time.

Salesloft offers:

- **Integrated login.** Uses log in once to the entire Revenue Workspace– Cadence, Conversations, Deals and Forecast.
- **Common users and groups.** Users and groups span the platform. Configure them once for use everywhere.
- **Access controls (FY23).** Common role and group access across the platform.



# #saleslove Europe



# Salesloft's EU Region

Live in 2021

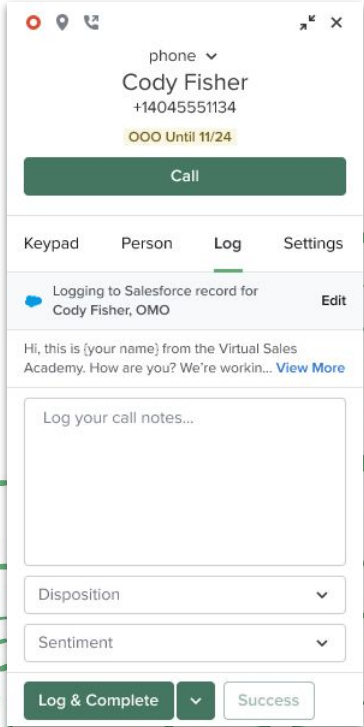
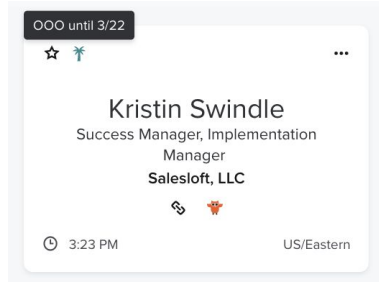
Frankfurt, Germany



# 🌴 OOO Detection 🌴

Everyone deserves a vacation. Salesloft's AI powered OOO detection not only automatically tracks your buyers out-of-office replies, but also reschedules cadence steps for the day after the buyer returns, not the day of, so your message comes at the perfect time, not when they are 'digging themselves out'.

**Delivered Q1 2022**



When a person finishes this cadence, set stage to

Completed

- Automatically remove people from this cadence if they reply to one of my emails
- Automatically remove people from this cadence if their email bounces
- Automatically reschedule step due dates when a person is marked out of office

OOO Detection is Enabled  
Salesloft will automatically mark People as out of office when an autoresponder email is received.  
[Learn More](#)

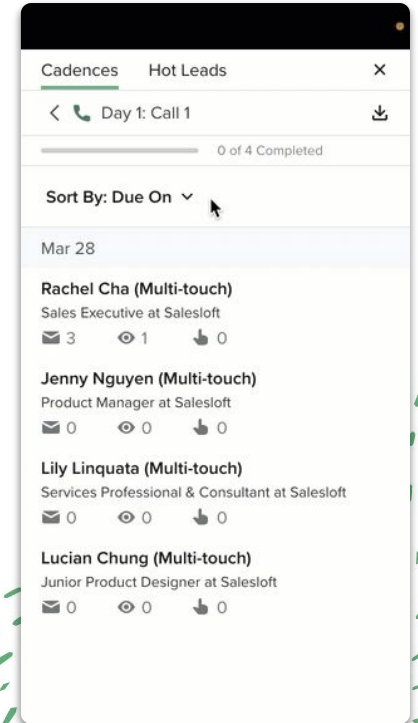
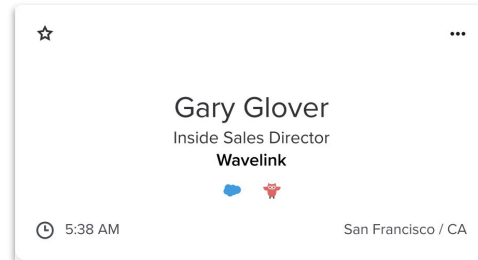
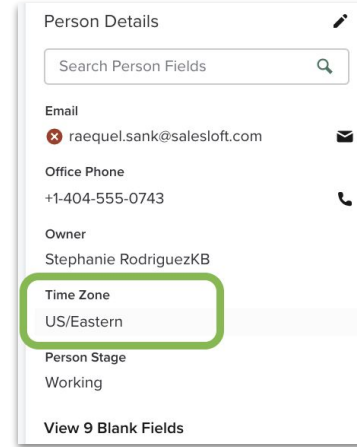
# Timezone Management

Engage when your buyer is available by grouping and sorting your cadence steps by recipient timezone or with a quick view of the contacts timezone from person and account pages.

## Best Practices

- **Manage to *their* time.** Add and update a contacts timezone in their details.
- **Engage on *their* time.** Before connecting, check your contacts timezone.

**Delivered Q1 2022**

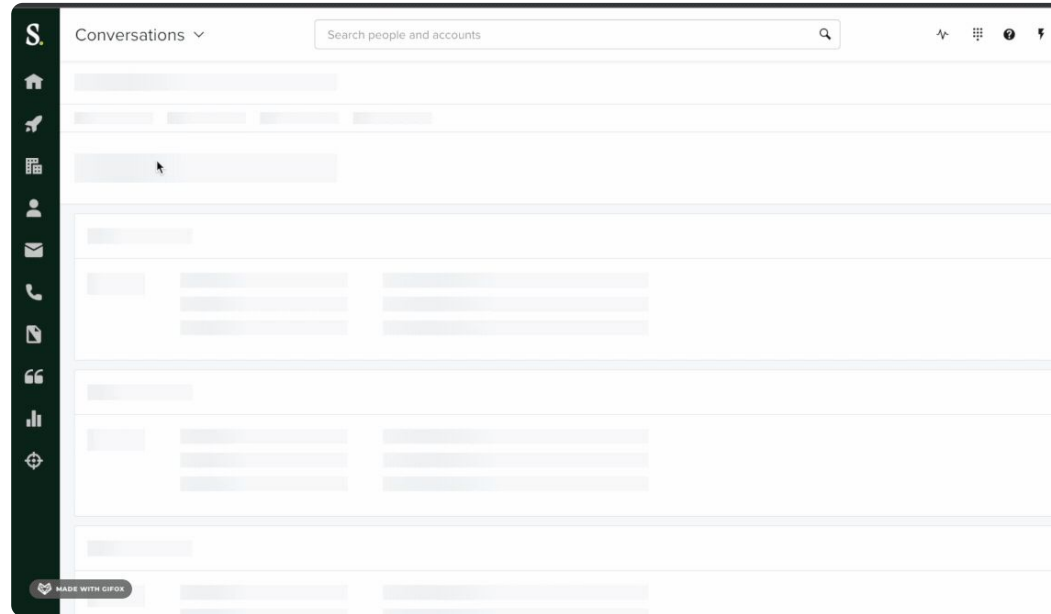


# Conversations: Multi-Language Support

Helping your team progress more deals, in more countries, with multi-language support. Gain the immense transcription insights from Conversations whether your customer is speaking:

- Deutsch - German
- Español - Spanish
- Français - French
- Italiana - Italian
- Netherlandic - Dutch

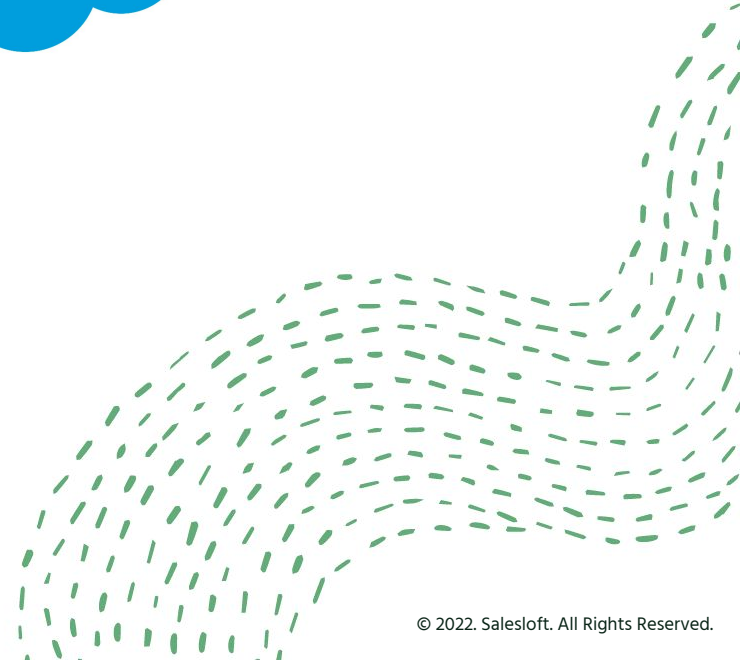
**Delivered Q1 2022**



HubSpot



 Microsoft Dynamics®



# Full Platform Localization

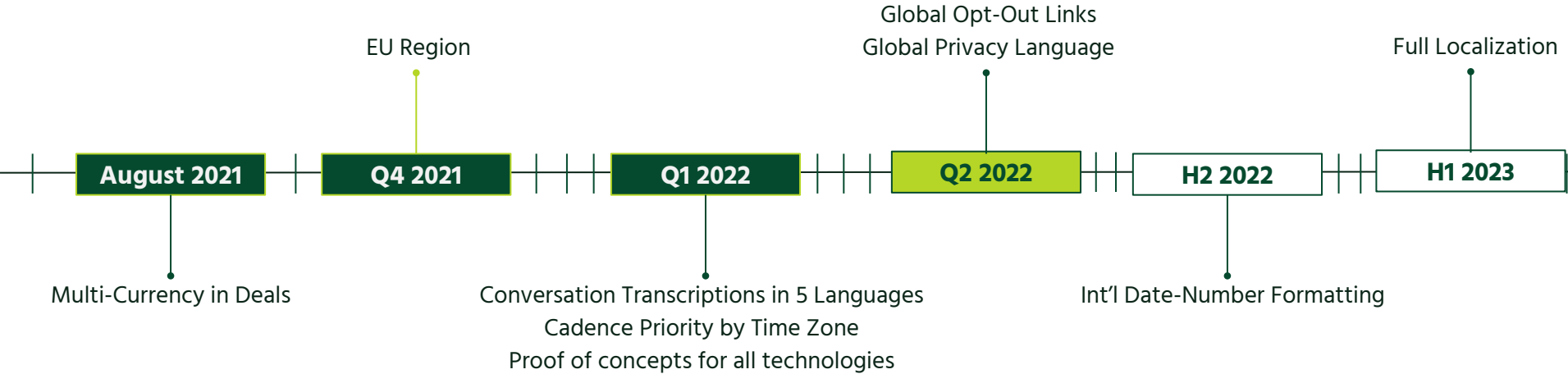
Early 2023

For more info, please reach out to your  
Account Exec or Account Manager.



# Localization

Immediate focus is Spanish, French, and German.



# Data and AI Across the Workspace– In the Workflow

Deal Insights

57 Last 7 Days ▲ 9 Last 30 Days ▲ 28

7 Day Summary

There have been 6 emails sent and 1 email reply The close date has changed to Mar 31, 2022.

Key Factors

- Engagement**  
58 emails opened in the past 14 days
- Frequency**  
37 emails in the past 35 days

Progression Indicators

24 Days spent in **Negotiating**

18 Days Since Last Meeting (Jan 26, 2022)

2 Close Date Pushes (~~Jan 31, 2022~~ → Mar 31, 2022)

Hide Detail

Deal Engagement Score

Live Feed

- Zeph Ward** | Ford Motor Company opened **Tripling revenue** 7 times an hour ago
- Trey Anatasio** | Prussia clicked **Referral from Page McConnell** 4 times 2 hours ago
- Herrod Love** | American Airlines replied to **How can I help?** 3 hours ago
- Henry Slater** became a Hot Lead 5 hours ago

Hot leads

- Re: Modern sales metrics & buyer sentiment FTW** Thank you for reaching out . **Positive Reply** July 9, 2020 11:00 AM  
Greg Hagadorn to Krista Carney
- Re: Cadence Email 2** Not sure that I am the right person to talk to here. **Not the Buyer** July 9, 2020 11:00 AM  
Jackson Stone to Krista Carney

Email Sentiment

Goal Projection Tracking

951 1.5K Projection  
Opps Created

500 Goal

Outcome Attribution



# Our Principles of AI in Sales Technology

## **Rooted in Value.**

There's a lot of hype in AI today. Salesloft AI answers key questions, right in the workflow, so that people can take action. Often, models for AI need to be sales specific.

## **Explainable.**

A key element of creating trust in AI, and therefore having it adopted, is explaining to people how the AI is generating answers.

## **Ethical.**

We have an AI Code of Ethics and hold ourselves accountable to key principles such as algorithm explainability and ease of redress.

# Salesloft Forecast: Bridging Data and Action

## Forecast Call Rollup.

An easy way to update and submit forecasts across the organization, right where sellers and managers are already working.

## Drilling Down to Opportunities

Leaders can drill down to each manager forecast and to individual deals, and track changes for opportunities in the pipeline

**AI-Driven Forecast** AI models that use your sales engagement data and historical performance to dial in on what's likely to land, and what you can influence.

The screenshot displays the Salesloft Forecast interface. At the top, there are navigation tabs for 'Cadence', 'Conversations', and 'Deals'. Below this, there are filters for 'Close Date: This Quarter', 'Owner: Daniel Garcia', 'Record', 'Stage', and 'Forecast Category'. A 'Submit Outlook' button is in the top right.

The main section is divided into two parts. On the left, a 'Team Rollup' shows a bar chart comparing 'Target' (\$1.1M), 'AI Forecast' (\$975K, 88%), 'Outlook' (\$900K, 82%), and 'Probable Sum' (\$817K, 74%). Below this is a table of metrics: Closed Won (\$328K), Commit (\$149K), Best Case (\$114K), Probable (\$114K), and Open Pipeline (\$223K).

On the right, a 'Weekly Trend' line chart shows the forecast over time from 5/10 to 7/25. The chart includes three lines: AI Forecast (yellow), Outlook (blue), and Probable Sum (red). A dashed line represents the Target at \$1.1M.

Below the charts is a table of user forecasts:

Users - 7 Total	Target	Outlook	AI Forecast	Closed Won	Commit	Probable	Best Case	Open Pipeline
<b>Daniel Garcia</b> Sales Manager	\$1,100,000 Team: \$1,110,000	↑ \$900,000 Team: \$960,000	↑ \$975,000	↑ \$328,000	\$149,000	\$150,000	\$114,000	↑ \$223,000
<b>Darrell Steward</b> Account Executive	\$185,000	↓						
<b>Arlene McCoy</b> Account Executive	\$185,000	↑						
<b>Bessie Cooper</b> Account Executive	\$185,000							
<b>Kristin Watson</b> Account Executive	\$185,000	↑						
<b>Robert Fox</b> Account Executive	\$185,000	▲						
<b>Jerome Ball</b> Account Executive	\$185,000	↑						

A 'Weekly Opportunity Changes' popup is open, showing that since last week (08/26/21 - 09/02/21), there have been 11 total changes to 10 Opportunities, leading to an overall increase by \$175K. The popup lists changes in Amount, Close Date, and Stage. The 'Amount Changes' section shows:

Opportunities	Amount	Change
55 Yundt LLC - ENT - Best Case - \$120K Kristin Watson	\$200K	▲ \$110K
82 Skiles Group - ENT - Reviewed - \$90K Bessie Cooper	\$195K	▲ \$90K
55 Jefferson Enterprise - ENT - Reviewed - \$90K Darrell Steward	\$125K	▼ \$25K

# What's Different About Salesloft Forecast?



## True Pipeline Visibility

With real-time pipeline visibility, easily see what's changed week to week. Drill into opportunities to understand deal health and buyer engagement.

Weekly Opportunity Changes

Since last week (08/26/21 - 09/02/21), there have been 11 total changes to 10 Opportunities. Those changes lead to an overall increase by \$175K.

Amount Changes	Close Date Changes	Stage Changes
5 Opportunities		
55	Vundt LLC - ENT - Best Case - \$120K Kristin Watson	\$200K + \$10K
87	Skiles Group - ENT - Reviewed - \$90K Bessie Cooper	\$95K - \$90K
55	Jefferson Enterprise - ENT - Reviewed - \$90K Darrell Steward	\$125K - \$25K
88	Rustenz Enterprises - ENT - Reviewed - \$10K Kristin Watson	\$105K - \$10K
88	Rustenz Enterprises - ENT - Reviewed - \$10K Jerome Bell	\$85K - \$10K



## Own the Number

Triangulate a call number your revenue teams feel confident in based on our AI Forecast, reps forecast, and what's closed won.

Your Forecast:

Notes

Dunder Mifflin, Stark Enterprise, and Wayne Enterprise are our top moved to Commit and should be closed within the week.

Burns Opp was omitted because of these three reasons and Rob forecast this week.



## Take Action

Now it's time to deliver on your number. With Salesloft, you'll identify risks in your pipeline, take action to address them, and win more deals. All from one platform.

Add to Cadence

Manage

- Edit
- Quick Actions
- Book a Meeting
- Call
- Email
- Remove from Opportunity

# Building the Future

# Our principles of innovation



## For all sellers

Revenue teams work together. They need a workspace where they can collaborate, not a separate system for each role.



## Outcomes focus

Salesloft favors outcomes throughout the Workspace. Selling, coaching, prospecting– we do the data to help you figure out what's working.



## Data → Action → Data.

With data and action in a tight loop, you can get smarter and better all at once.

Salesloft builds  
The Revenue Workspace  
where sellers love to win.