

Executive Summary

The ShiftUp Guided Selling AI solution enhances Salesforce with intelligent research and analysis capabilities, empowering sales teams to generate data-driven account plans and opportunity hypotheses. Built as a managed extension package for Salesforce, it seamlessly integrates AI-powered insights into your existing CRM workflow. The AI Engine Service's workflow agents conduct comprehensive research and data gathering to provide actionable intelligence for your sales team.

How It Works

System Architecture

Our solution consists of three main components working together:

1. Salesforce Extension Packages

- **Core Package:** Provides the foundation with account planning data models and security framework
- **AI Extension Package:** Adds intelligent research capabilities and hypothesis generation

2. AI Engine Service (Cloud-Based)

- Hosted on Google Cloud Platform for scalability and reliability
- Executes intelligent research workflows using advanced AI models
- Analyzes accounts and generates actionable sales hypotheses
- Analyzes sales hypotheses to research relevant stakeholder roadmap data
- Provides secure API integration with enterprise-grade authentication

3. Business Partner Organization

- Manages licensing and feature enablement
- Tracks usage metrics and ensures compliance
- Provides centralized configuration management

Key Capabilities

- **AI-Driven Account Research:** Automatically gathers and analyzes relevant information about target accounts
 - **Opportunity Hypothesis Generation:** Creates data-backed sales opportunities based on AI analysis
 - **Stakeholder Roadmap Generation:** Develops targeted engagement strategies for key decision makers
 - **Seller Profile Templates:** Customizable contexts that tailor AI insights to your specific industry and sales approach
 - **Secure Integration:** Enterprise-grade security with API key management and encrypted communications
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Technology Stack

AI and Machine Learning

- Advanced language models for intelligent analysis and research (including Google Gemini, Anthropic Claude, and OpenAI models)
- Agentic workflows that perform multi-step research processes and extract actionable insights
- Models are never trained on your data

Infrastructure

- **Google Cloud Platform:** Ensures high availability and scalability
- **Temporal Workflow Engine:** AI workflows orchestrated by enterprise-level workflow engine to ensure reliability
- **Secure APIs:** HTTPS encryption for all data transmission
- **Managed Salesforce Packages:** Native integration with full security compliance

Data Security

- API key authentication stored in Salesforce Protected Custom Settings
- Row-level security enforcement through Salesforce sharing model
- No sensitive data stored outside of your Salesforce environment
- Models are never trained on your data

Implementation Process

1. Quick Setup

- Install managed packages in your Salesforce org
- Configure AI Engine connection with provided API credentials
- Set up seller profile templates for your team

2. User Experience

- Sales reps initiate AI research directly from account records
 - System automatically analyzes account data and external information
 - AI-generated hypotheses appear as actionable opportunities in Salesforce
 - Full audit trail of all AI analyses and recommendations
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Benefits for Your Organization

- **Accelerated Sales Cycles:** AI-powered insights help identify opportunities faster
- **Data-Driven Decisions:** Base account strategies on comprehensive AI analysis
- **Seamless Integration:** Works within your existing Salesforce environment
- **Scalable Architecture:** Cloud-based infrastructure grows with your needs
- **Maintained & Supported:** Managed package model ensures continuous updates and support

Technical Assurance

- Built following Salesforce security best practices
- Respects all Salesforce sharing rules and permissions
- Enterprise-grade security with encrypted communications (HTTPS)
- Regular security updates through managed package framework

The Guided Selling AI solution represents a sophisticated yet user-friendly approach to augmenting your sales team's capabilities with artificial intelligence, all while maintaining the security and reliability your enterprise demands.
