



ACUITY

SALES DECISION SCIENCE



appexchange
partner

Realize the Upside

Acuity3D™

The smart decision platform for sales.

Sell more - using AI to guide your team to take the right actions, at the right time, for the right reasons.



Sales Manager

“I need to implement a smart, flexible process that can scale as my team grows.”

Benefits

- Provide real time, AI-driven coaching for 1,000's of time allocation decisions
- Increase BDR efficiency and quota attainment
- Manage/balance multiple processes

Business Development Rep (BDR)

“I need to work more efficiently and follow our multi-step process.”



Benefits

- Sell more by engaging high probability leads
- Save time with Next Best Action recommendations
- Simplify CRM navigation

Sales Operations

“I need to apply analytical insights to increase team effectiveness.”



Benefits

- Apply AI models to improve process efficiency
- Automate model deployment and management
- Create cleaner, higher quality data for analysis

SOLUTION Acuity3D™

- **Guides Rep Actions** via Next Best Action recommendation “cards” in Salesforce.com
- **Implements Manager-defined Sales Process** via a smart, dynamic Guidance Engine

How is it different/better?

- Integrates 3 technologies into a **Smart Sales Guidance System:**
 1. **Simple, Flexible Interface:** Enables Reps to work quickly, their own way
 2. **Guidance Engine:** Leads reps thru dynamic, multi-touch sales processes
 3. **Artificial Intelligence:** Ranks Next Best Actions by conversion probability
- Compare to...
 - **Lead Scoring:** Static ranked lists with no guidance on what to do when
 - **Cadence Automation:** Expects strict compliance; Inflexibility causes clogs, lead abandonment and mass clean-ups/archiving = Broken process
 - **Click-to-Dial and Auto-Emailing*:** Treat “go faster” as the answer and sales people as robots.... No science or process to guide sales time allocation

*Acuity3D integrates with dialers and email systems

Acuity3D™

Simple Interface

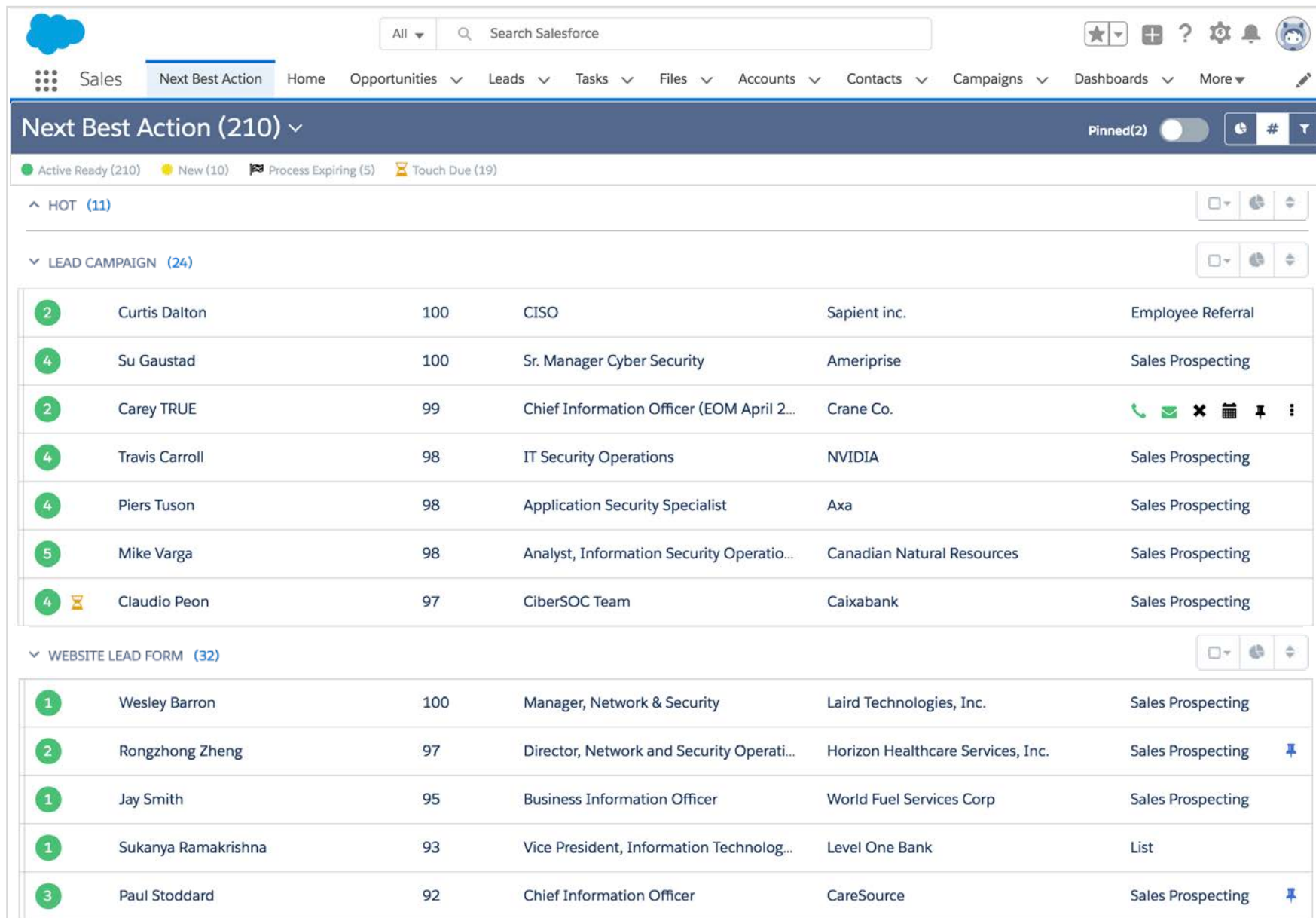
in Salesforce.com

Action cards ranked by
conversion probability

Cards show recommended
actions - **Green** for **Do Now**
- Touch# shown

Configurable:

- Groups/Sources
- Multi-touch Processes
- Call/Email Workflows
- Card Content



The screenshot displays the Salesforce 'Next Best Action' interface. At the top, there's a navigation bar with tabs for Sales, Next Best Action (selected), Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and More. A search bar is also present. Below the navigation bar, the 'Next Best Action (210)' section is active, showing a summary of action counts: Active Ready (210), New (10), Process Expiring (5), and Touch Due (19). The interface is divided into two main sections: 'LEAD CAMPAIGN (24)' and 'WEBSITE LEAD FORM (32)'. Each section contains a list of action cards, each with a rank in a green circle, a name, a score, a title, a company, and an action type. The 'LEAD CAMPAIGN' section shows cards for Curtis Dalton, Su Gaustad, Carey TRUE, Travis Carroll, Piers Tuson, Mike Varga, and Claudio Peon. The 'WEBSITE LEAD FORM' section shows cards for Wesley Barron, Rongzhong Zheng, Jay Smith, Sukanya Ramakrishna, and Paul Stoddard. Each card has a 'Touch#' icon and a 'Do Now' button.

Rank	Name	Score	Title	Company	Action Type
2	Curtis Dalton	100	CISO	Sapient inc.	Employee Referral
4	Su Gaustad	100	Sr. Manager Cyber Security	Ameriprise	Sales Prospecting
2	Carey TRUE	99	Chief Information Officer (EOM April 2...	Crane Co.	Call, Email, Task, Calendar, Pin, More
4	Travis Carroll	98	IT Security Operations	NVIDIA	Sales Prospecting
4	Piers Tuson	98	Application Security Specialist	Axa	Sales Prospecting
5	Mike Varga	98	Analyst, Information Security Operatio...	Canadian Natural Resources	Sales Prospecting
4	Claudio Peon	97	CiberSOC Team	Caixabank	Sales Prospecting
1	Wesley Barron	100	Manager, Network & Security	Laird Technologies, Inc.	Sales Prospecting
2	Rongzhong Zheng	97	Director, Network and Security Operati...	Horizon Healthcare Services, Inc.	Sales Prospecting
1	Jay Smith	95	Business Information Officer	World Fuel Services Corp	Sales Prospecting
1	Sukanya Ramakrishna	93	Vice President, Information Technolog...	Level One Bank	List
3	Paul Stoddard	92	Chief Information Officer	CareSource	Sales Prospecting

Next Best Actions

As actions are completed, cards are removed from the list. A new list is generated daily.

Quick Dial Mode

Click-to-dial from the hover menu enables “fast attempts” and outcome disposition.

Sales

Next Best Action

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

More

All

Search Salesforce

★

+

?

⚙

🔔

👤

Next Best Action (210)

Pinned(2)

Active Ready (210)

New (10)

Process Expiring (5)

Touch Due (19)

PROSPECTING (190/190)

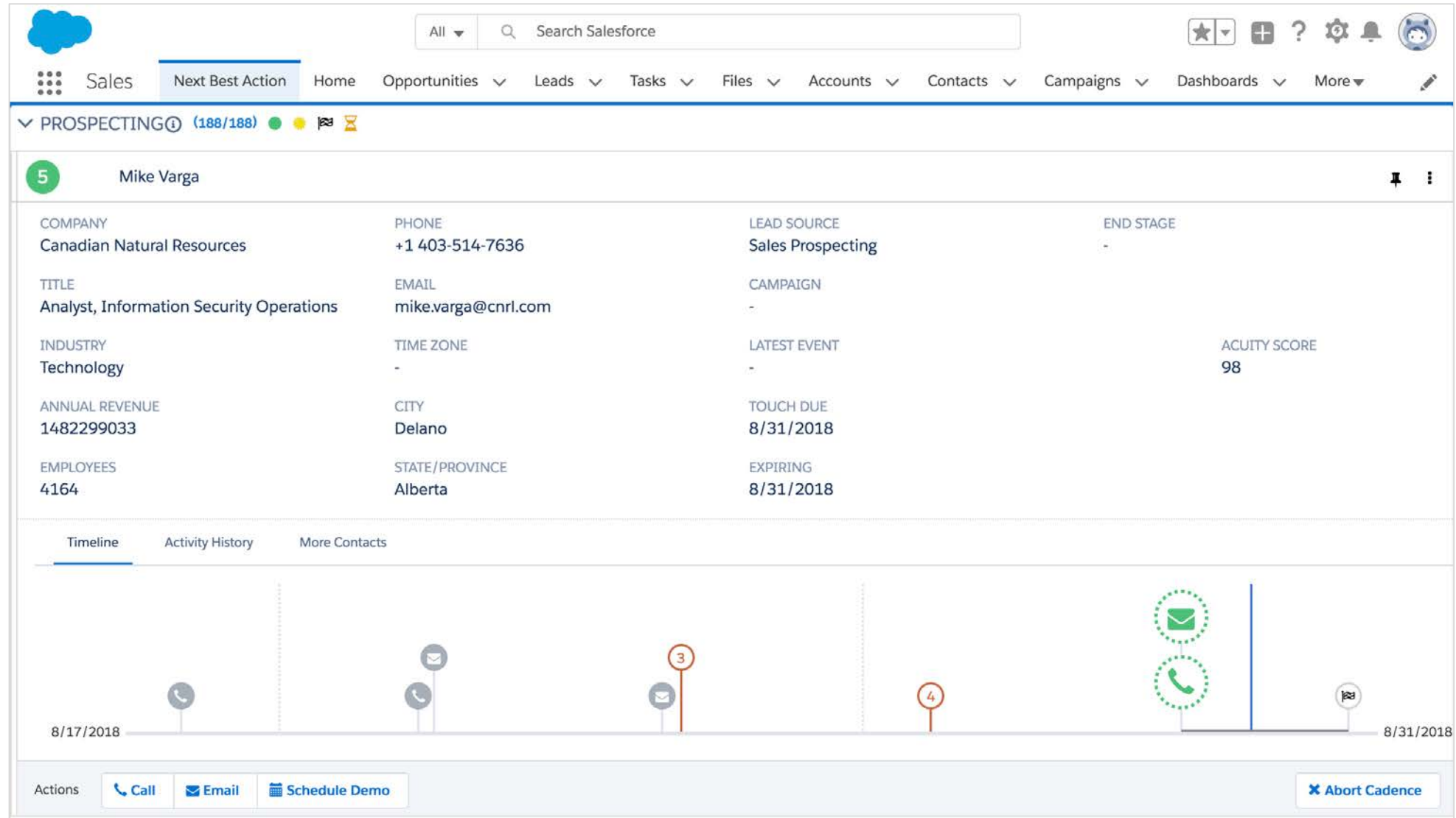
2	Curtis Dalton	100	CISO	Sapient inc.	Employee Referral
4	Su Gaustad	100	Sr. Manager Cyber Security	Ameriprise	Sales Prospecting
2	Carey TRUE	99	Chief Information Officer (EOM April 2...	Crane Co.	Sales Prospecting
Call Connect Left Voice Mail No Answer Cancel Commit					
4	Piers Tuson	98	Application Security Specialist	Axa	Sales Prospecting
5	Mike Varga	98	Analyst, Information Security Operatio...	Canadian Natural Resources	Sales Prospecting
4	Travis Carroll	98	IT Security Operations	NVIDIA	Sales Prospecting
4	Claudio Peon	97	CiberSOC Team	Caixabank	Sales Prospecting

Reps are guided through a multi-touch process.

The 5th touch is recommended.

It consists of a call and an email before the due date.

When the touch is completed, the icon turns purple and the card “slides right” to disappear.



The screenshot shows a Salesforce interface for a lead named Mike Varga. The lead is in the 'PROSPECTING' stage with an 'ACUITY SCORE' of 98. The timeline shows a sequence of touches: a call on 8/17/2018, an email on 8/17/2018, a call on 8/17/2018, an email on 8/17/2018, a call on 8/17/2018, and an email on 8/17/2018. The 5th touch is highlighted with a green circle and a green envelope icon, indicating it is the recommended next action. The timeline ends on 8/31/2018. The 'Next Best Action' tab is selected, showing the recommended touch. The 'Actions' bar at the bottom includes 'Call', 'Email', 'Schedule Demo', and 'Abort Cadence'.

COMPANY	PHONE	LEAD SOURCE	END STAGE
Canadian Natural Resources	+1 403-514-7636	Sales Prospecting	-

TITLE	EMAIL	CAMPAIGN
Analyst, Information Security Operations	mike.varga@cnrl.com	-

INDUSTRY	TIME ZONE	LATEST EVENT	ACUITY SCORE
Technology	-	-	98

ANNUAL REVENUE	CITY	TOUCH DUE
1482299033	Delano	8/31/2018

EMPLOYEES	STATE/PROVINCE	EXPIRING
4164	Alberta	8/31/2018

Timeline: 8/17/2018 to 8/31/2018

Actions: Call, Email, Schedule Demo, Abort Cadence

Reps are guided through a multi-touch process.

Expanded Mode
shows more details,
enables research,
AND call/email
flows.

Process Timeline
shows multi-touch
history and future
path.

The screenshot displays the Salesforce interface for a lead named Mike Varga. The top navigation bar includes the Salesforce logo, a search bar, and various menu items like Sales, Next Best Action, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and More. The lead record is titled "PROSPECTING (188/188)" and shows a status of "5" and "Mike Varga".

COMPANY	PHONE	LEAD SOURCE	END STAGE
Canadian Natural Resources	+1 403-514-7636	Sales Prospecting	-

TITLE	EMAIL	CAMPAIGN
Analyst, Information Security Operations	mike.varga@cnrl.com	-

INDUSTRY	TIME ZONE	LATEST EVENT	ACUITY SCORE
Technology	-	-	98

ANNUAL REVENUE	CITY	TOUCH DUE
1482299033	Delano	8/31/2018

EMPLOYEES	STATE/PROVINCE	EXPIRING
4164	Alberta	8/31/2018

Below the details, there is a "Process Timeline" section with tabs for "Timeline", "Activity History", and "More Contacts". The timeline shows a sequence of events from 8/17/2018 to 8/31/2018, including a call icon, an email icon, a red circle with the number 3, a red circle with the number 4, and a green circle with a call icon and a green circle with an email icon. At the bottom, there are "Actions" buttons: "Call", "Email", "Schedule Demo", and "Abort Cadence".

Recommended (~Late afternoon POV)

Cards stay on the list – and statuses change as actions are performed.

- Still to do (green)
- Done/pending (purple)
- Converted (blue)
- Completed (black)

Enables seeing what's been done throughout the day vs. what remains to be done.

At the start of the next day... Cards start off green again with fresh recommendations.



Recommended (124) ▾

Starred (4) ☐ Pinned (7) ☐

🔍 # ⌵

^ HOT (11)

▾ LEAD CAMPAIGN (24)

1	★ Ronnie Sherilyn	94	Chief Executive Officer	Sunlightning	Lead Campaign	📌
2	☆ Jacki Robena	83	Operations Manager	Mountainnetworks	Lead Campaign	📌
4	☆ Barnaby Ferdie	82	Service Representative	Fortune Foods	Lead Campaign	
3	☆ Cynthia Arlen	79	Operations Manager	Smart Acoustics	Lead Campaign	
	☆ Open Opportunity	76	Administrative Manager	Riddlefly	Lead Campaign	
+						

▾ WEBSITE LEAD FORM (32)

1	☆ Bradley Von Gronkowski	91	Vice President of Secur...	EmblemHealth Inc.	Submitted Lead Form	📌
3	☆ Jeanette B. Smith	88	Vice President of Secur...	The Bank of New York...	Submitted Lead Form	📌
2	★ Lawrence Archibald Jr.	87	Vice President of Secur...	Telefonica Czech Repu...	Submitted Lead Form	📌
P	☆ Partially Completed	82	Vice President of Secur...	Ecology and Environm...	Submitted Lead Form	
C	☆ Completed Cadence	80	Vice President of Secur...	ENGlobal	Submitted Lead Form	
+						

▾ COMPLETED WEBINAR (26)

12

Filters

Enable reps to focus on a subset of the list...

“Do it my way.”

Recommended (14/124) ▾

Starred (4) ☐ Pinned (7) ☐

Active Today + In Progress: All (14/105) ×

Score: 80 - 92 (14/26) ×

Clear All

^ HOT (3/11)

▾ LEAD CAMPAIGN (2/24)

▾ WEBSITE LEAD FORM (3/32)

▾ COMPLETED WEBINAR (2/26)

^ MARKETING CAMPAIGN (4/31)

2	☆	Jacki...	83	Operations...	Mountainnetworks	Lead Campaign	📌
4	☆	Barnaby...	82	Service Repr...	Fortune Foods	Lead Campaign	
1	☆	Bradley...	91	Vice Presiden...	EmblemHealth Inc.	Submitted Lead Form	📌
3	☆	Jeanette...	88	Vice Presiden...	The Bank of New...	Submitted Lead Form	📌
2	★	Lawrence...	87	Vice Presiden...	Telefonica Czech...	Submitted Lead Form	📌
8	☆	Bethany...	89	Product Mobil...	Timborecords	Completed Webinar	
3	☆	Randy...	86	Lead Commun...	Flux Arts	Completed Webinar	📌

Showing 14 out of 124

▾ Active Today:

▾ In Progress:

☒ All (105)

☐ Hot (11)

☐ New (2)

☐ Expiring (4)

☐ Last Touch (3)

Touch #:

▾ Title:

Search Titles

🔍

☐ Vice President of Security (3)

☐ Service Representative (3)

☐ Operations Manager (2)

☐ Product Mobility Architect (2)

☐ Lead Communications Analyst (1)

+ See More

▾ Acuity Score:

Enter Single Acuity Score or Range

80

 to

92

☐ 75 - 100 (14)

▾ Next Touch Date:

Select Single Next Touch Date or Range

to

Reps want to know...

“Where am I in the sales process? Why is this here? What comes next?”

Simple, Visual System for Process Status

- Colors
- Numbers
- Flags

STATUS KEY

Available



Pending Upstream (not recommended, no #)

Active



Green: Recommended for Action now
Next Touch # (#1 is 0 for X days, then #1)



Purple: In Progress, no action recommended now
Next Touch # (#1 is 0 for X days, then #1)

Converted



Blue: Converted Pending (opportunity still open)
Converted to Opportunity, Open

Archive



Black: Converted Lost + Won, Archived (inactive)
L - Converted to Opportunity, Lost
W - Converted to Opportunity, Won
C - Completed Cadence
R - Rejected (never engaged, quick kill)
D - Disqualified (engaged and decided not a fit)
P - Partially completed
I - Ignored, never started

Status:

Status icons with tool tips



Hot



New



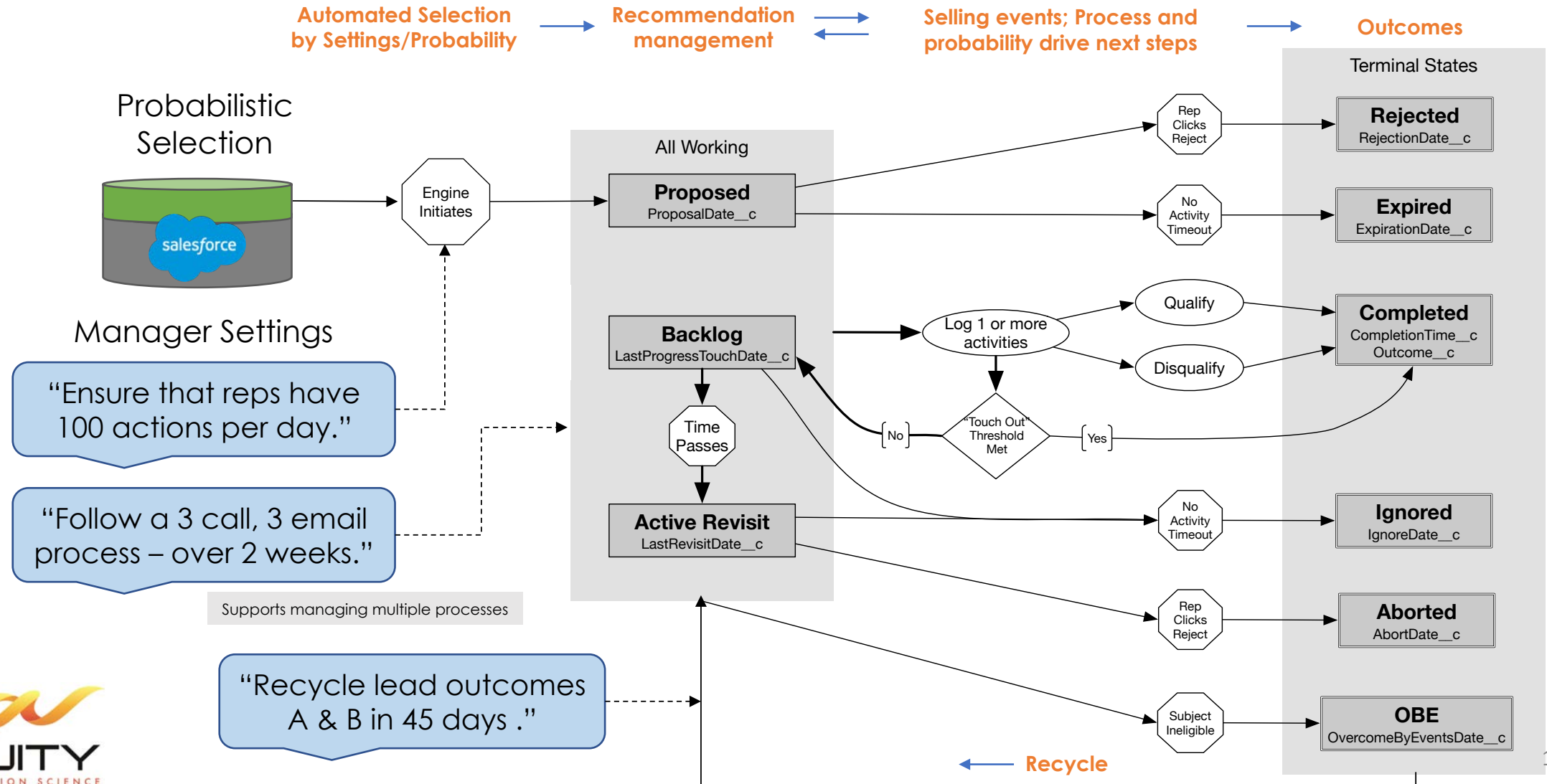
Expiring



Last Touch

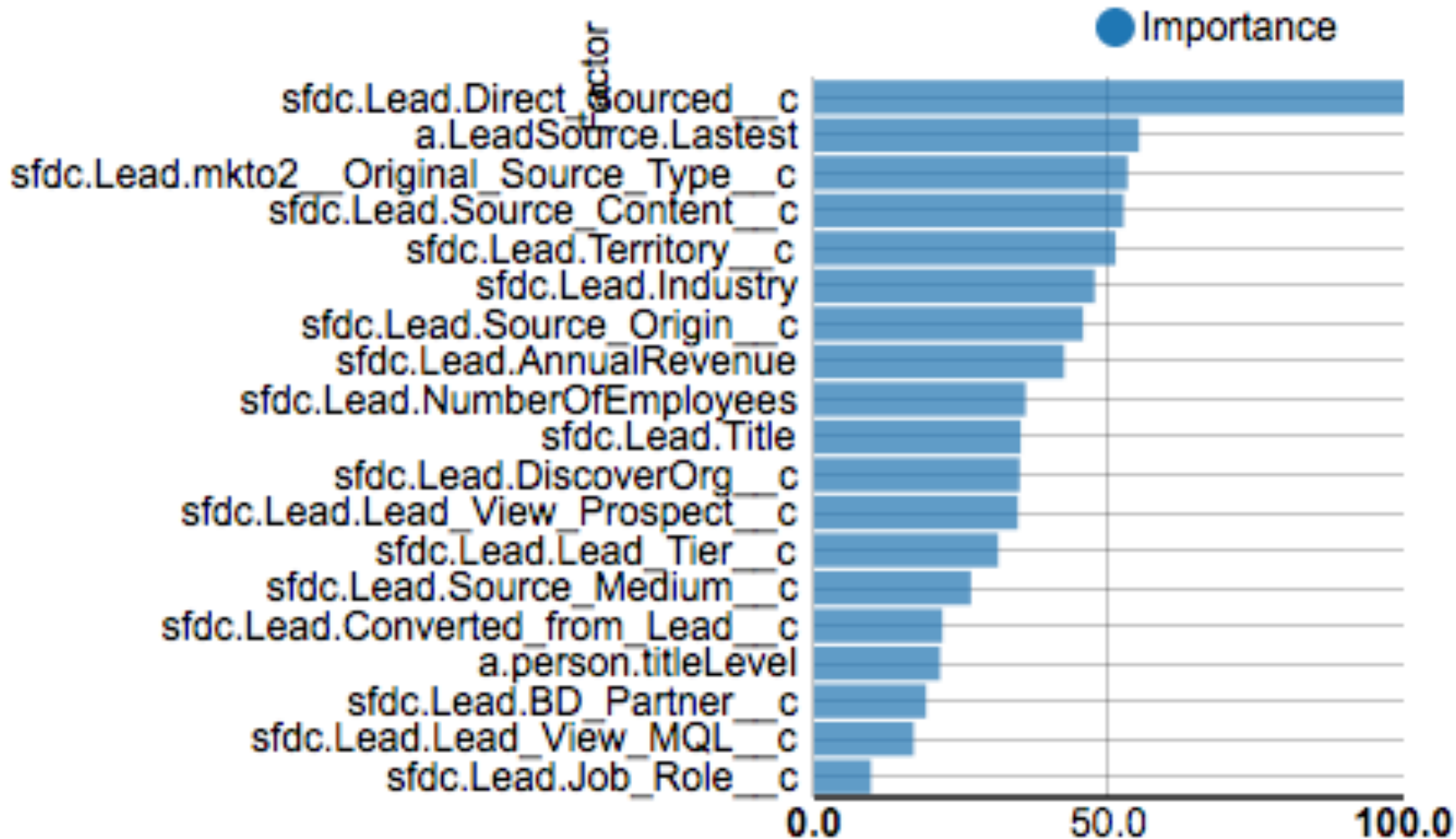
Acuity3D™ Guidance Engine

- Automates multi-touch sales processes
- Recommended selling actions ranked by probability



Acuity3D™ Modeling Engine

- Discovers factors and behaviors correlated with sales
- Factors used as a probability ranking system for Prospects/Customers



Example: Models based on statistically significant factors specific to your company/CRM.

“In my 20 years of leading sales teams, I’ve always wanted a way to drive process consistency and transparency. With **Acuity3D, we’ve done it. Amazing!**

Our sales reps are now focused on the right behaviors for multiple lead sources and engagement cadences – all within Salesforce.com.

Outstanding product and customer service.”



Phil Johnson
Director of North American Sales



REALIZE THE UPSIDE



To learn more and schedule a demo, go to **AcuitySDS.com**