INSIGHTSQUARED

See and Scale Your Winnable Deals

This platform is more than another tool in your tech stack. It's the engine you want to drive your business.

Do you know what your best reps do differently? Why a recent marketing campaign drove significantly more conversions? What makes one team so much more effective selling against the competition? Or when and why your buyer loses interest? That's revenue intelligence. That's why we're here.

With a robust machine learning engine at the core, the InsightSquared Revenue Intelligence Platform goes beyond meeting and email tracking to map out exactly why and how wins occur. We track each individual action, understanding how it works in tandem with multiple activities. And we balance that data with deal attributes, persona engagement, progression timelines, and much more—alerting reps, managers and leaders in-the-moment, so they can adapt in time to change the outcome.

Activity Capture

Know the true state of engagement across every deal, including whether next steps are set

Interactive Reporting

Validate rep commits with machine learning models while improving the Funnel Review effectiveness

Conversational Intelligence

Capture call and meeting data to enrich machine learning models, predictions, forecasts, and analytics

Machine Learning

Revenue Intelligence Platform

AI Driven Forecasting

Roll-up and manage your forecast, override, track historical and ensure accuracy

Guided Selling

Prompt reps in the moment to improve data hygiene and overall execution

Dashboards & Analytics

Report results to the business, with real- time executive-level BoD, QBR, MBR dashboards and analytics

Get precise insight. Celebrate more wins.

Six Integrated Solutions in One

The InsightSquared Revenue Intelligence Platform is the only platform that **unites six core revenue solutions into one**. At last, you can bring together all of your critical data, insights, and actions from across marketing, sales, and customer success to really see and understand both the big picture—and the small details, that make a big impact. After all, in sales, it's not one big aha moment. It's the hundreds of smaller moments that lead to wins or loses.

Let InsightSquared uniquely identify key inflection points specific to your organization—and then reveal steps you can take to improve process, velocity, and outcomes everywhere.

Are you ready to boost pipeline health, accelerate targeted coaching, and deliver more value across your complete customer journey? The answers are finally at your fingertips. Unlock more data, without the administrative burden.

Move Beyond Analytics to Powerful Action

Our comprehensive platform is your single source of truth: reliable data, dashboards, analytics, and predictions to help run your business. InsightSquared is smart, flexible and customizable —giving you the power to slice and dice data and visualize in real-time how each step, and the combination of multiple steps, impacts the sales process. Our goal aligns directly with your long-term success. So we write all data back to your CRM. You own the data and the analysis.

The InsightSquared Revenue Intelligence Platform empowers you to clearly and confidently see and take the actions that win deals.

Opportunity Sel...
$2.88m

Forecast Value
$3.19m

Forecast Adjustments
↓14k $3.19m
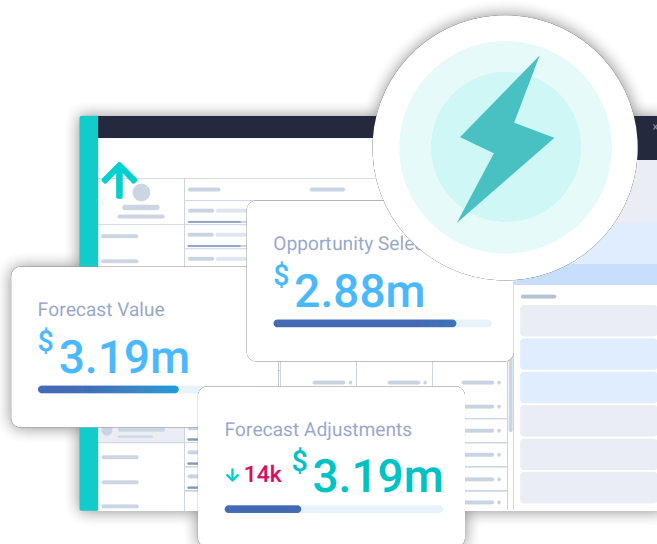
What we know:

- The B2B customer journey is complex with each deal moving at its own rhythm.
- It's challenging to keep tabs on every play and keep everyone on the team up-to-date and informed.
- You need to understand what winning looks like and where deals go off track.
- That requires a single source of truth and a proactive engine that does more than just report outcomes.
- Winning revenue teams constantly strive to understand why and how to improve.

What we deliver:

- Unprecedented visibility and insight into every step of your sales process for a true, complete, and holistic view to ensure cross-functional collaboration.
- Identification of key inflection points that managers can use to improve coaching and inspections—no more time wasted on dead deals.
- Real-time filtering and flexibility, so you leave with answers, not more questions.
- Automation that frees you from data entry, giving you more time to focus on what's really important.
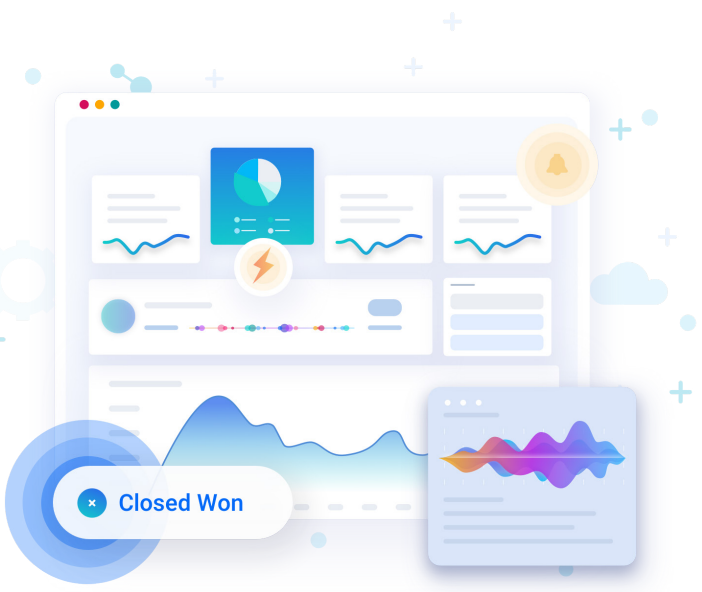- Trust in the data that drives your decisions so you can forecast with confidence.

INSIGHT**SQUARED**

Closed Won

Turn everyday data into exponential improvement and growth. That's how InsightSquared helps you out-execute the competition.

Gain the Edge with Automation and Machine Learning

InsightSquared automatically captures every email, call recording, attachment, file, contact… you name it. When it comes to the moments that matter, we're on it, freeing your team for more important tasks.

And while sales and business analytics tools have traditionally presented static outcomes or projections based on capacity and conversion rates, InsightSquared applies machine learning to continuously analyze every step in the sales process. Our platform understands what creates risk and upside. It identifies activities that occurred along with any actions that were skipped. We use all that information to define what winning deals look like for your company and where key inflection points happen.

From there, we can track each deal and send alerts when they diverge from the optimum path.

Every part of your revenue process is now visible. Go beyond quantitative metrics like sales cycle length and capacity and tie in quantitative analysis such as pipeline health, campaign effectiveness, sales process effectiveness, activity profiles, and more.

An Architecture Built for Scale

You have big visions. We're here to support and empower your growth, quarter-over-quarter and year-over-year. The InsightSquared Revenue Intelligence Platform was architected from the ground up for scale, security, and speed.

- Self-Service—Add new reports and dashboards. Segment forecasts and define your hierarchy. Personalize views based on roles or team. Filter by any field and drill in to every moment or activity. All from the user interface, with metrics changing in real-time.
- Data Lake Architecture—Run large queries fast, with no latency; Analyze structured and unstructured data side-by-side with no user intervention.
- Hosted in AWS—Enjoy massive scalability that exceeds every performance standard.
- Data Configurability, Correlation and Context—Easily map both standard and custom objects and correlate data at scale based on any factor. Designed to support even the most complex CRM configurations and sales processes.
- Enterprise-Grade Security—Sleep soundly at night. SSAE18 SOC2 compliant; Encryption at Rest and in transit; SAML Support; ABAC Authorization Model.

INSIGHTSQUARED

Make the best decisions for your business.

The 6 Pillars of The InsightSquared Revenue Intelligence Platform

Our consolidated platform features six powerful, integrated offerings. Together, these pillars deliver unprecedented insights that equip your team to make the best decisions for your business, time after time. Here's what makes our platform the industry's broadest and most effective RevOps platform.

1. Know the true state of engagement across every deal.

ACTIVITY CAPTURE
Activity data is the number one indicator of sales outcomes. So we automate, connect, and then write the full team's activities back to your CRM. Discover exactly what activities your sales team has completed, the steps they missed, and how prospects responded, so you can drive more consistent, predictable results.

2. Enhance every forecast, every report, every dashboard.

CONVERSATIONAL INTELLIGENCE
Record, transcribe, and analyze every customer call and meeting, from lead to opportunity, customer to upsell. Capture transcripts, keywords, trends, and talk time, and use that data to enrich machine learning models, predictions, forecasts, and analytics.

3. Prompt reps in the moment to improve data hygiene and overall execution.

GUIDED SELLING
Put your reps and account managers on the fastest path to success with in-the-moment guidance based on best practices, key steps in your sales process, plus machine learning. Customize by person, role, opportunity type, or any field. Scale best practices learned from top players. Onboard quickly. And hold everyone accountable by tracking through completion.

4. Validate rep commits with ML while improving funnel review effectiveness.

INTERACTIVE REPORTING
Go beyond progression and goal mapping to assess the entire customer journey utilizing our Machine Learning, Confidence-to-Close, and Ideal Customer Profile models. Understand activities, processes, behavior and results. Instantly detect exceptions and risk. Know if you're invested in the right deals. Then adapt strategies well before it's too late.

5. Roll-up and manage your forecast and track historical data while ensuring accuracy.

AI FORECASTING
Say goodbye to error-filled spreadsheets. Automate and streamline forecast submission across your team. Then balance human inputs with machine learning to validate your forecast and investments. Minimize risk and capture upside—to not just meet, but exceed your goals

6. Report real-time results to the business with advanced dashboards and analytics.

DASHBOARDS
The B2B customer journey is always changing, which means your revenue strategy should be ready to adapt as well. Our intelligent RevOps dashboards shorten the distance between data and informed decisions for every business leader involved in generating revenue for your company. Align your complete go-to-market team around a uniform view to maximize results.

InsightSquared is the only Revenue Intelligence Platform that unites six powerful, integrated solutions into one. We help organizations build stronger pipelines, unlock hidden coaching opportunities, boost forecast accuracy, and improve conversion rates by equipping them with actionable, real-time intelligence. Get the edge and leverage data to see and scale your winnable deals.
www.insightsquared.com