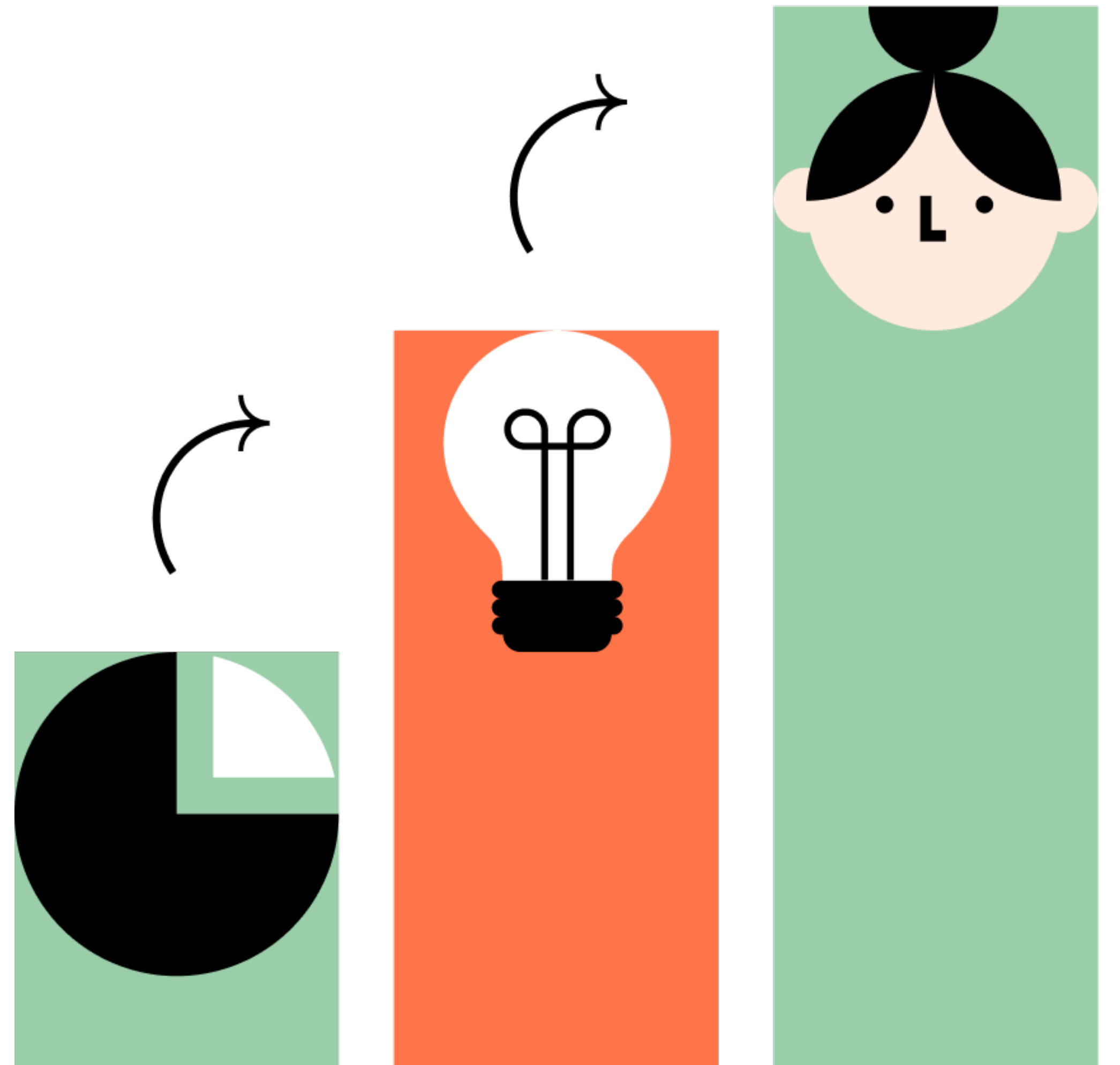


Accelerating Innovation in Revenue Intelligence



Introduction

In today's B2B landscape, revenue growth is essential to market leadership. To capture more revenue, every deal counts. To close more deals, every interaction counts.

Companies need timely, accurate data and actionable insights to make every interaction count. Yet efforts to modernize sales automation systems face complex challenges, as advanced technologies like AI put greater demands on infrastructure that is already pushed to the brink. Additionally, remote and hybrid work environments combine with fragmented customer information across siloed tools and platforms. This leads to incomplete, inconsistent data, poor pipeline visibility, inaccurate forecasting among revenue leaders, and missed opportunities for sales reps.

Several pivotal trends are reshaping the sales automation landscape globally and moving the needle toward revenue intelligence to drive growth. Innovation in revenue intelligence includes new AI-driven capabilities that enable teams to do more with less while capturing data from across systems and empowering teams to take action to win more deals.

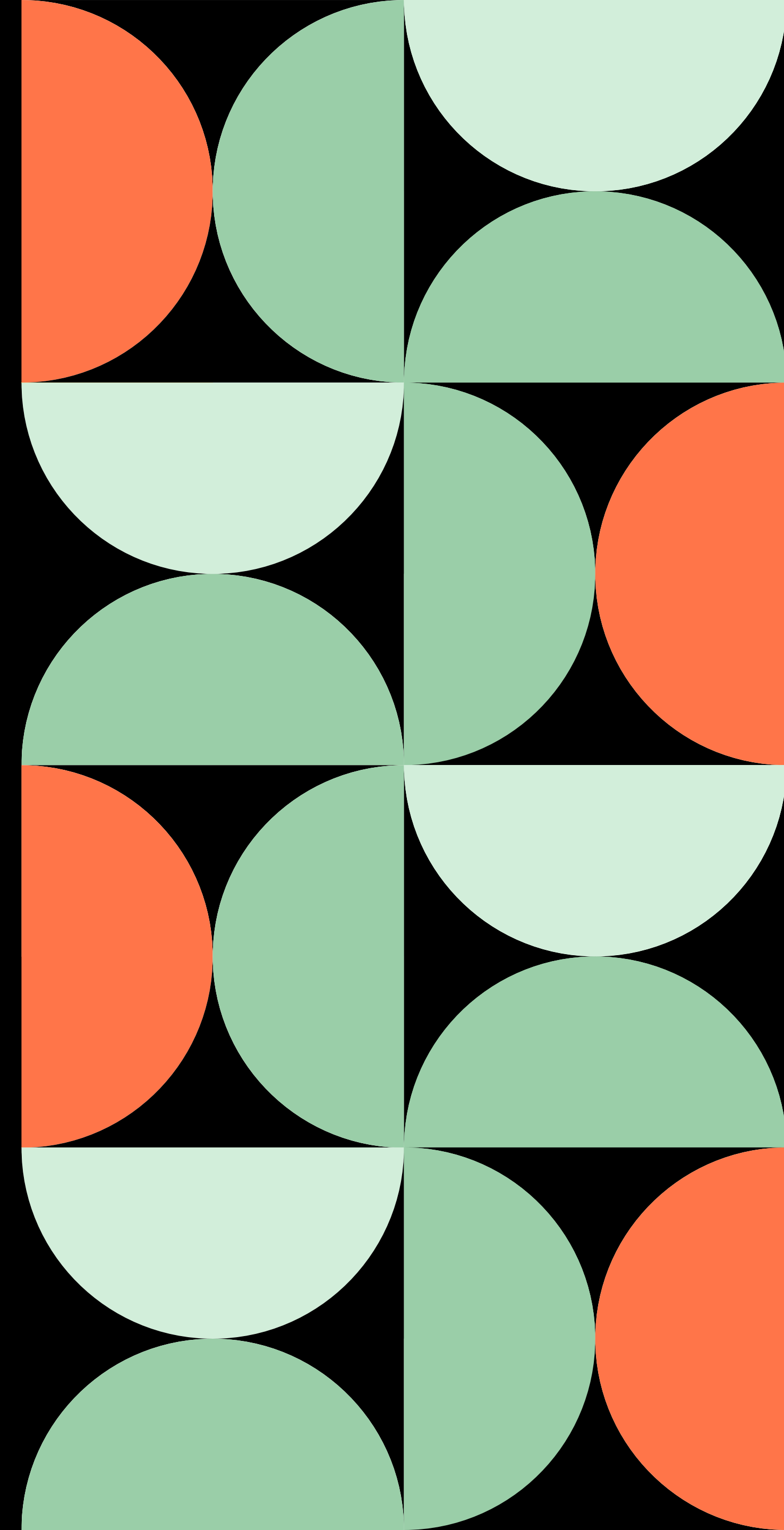
Businesses should approach revenue intelligence strategically, with a keen focus on its ability to improve workflow processes and team productivity, enable more accurate forecasting, and expand revenue generation. Revenue leaders can look to such a solution as a powerful tool that supplements human activity, automates manual, time-intensive tasks, and boosts their efficiency in winning deals and accelerating revenue growth.

Is this trajectory expected to continue in 2024? What is technology's role in changing the narrative around revenue intelligence? Will it be cast as the villain, a savior, or both? As 2024 gets underway, let's talk about the pivotal trends that are reshaping the sales automation landscape globally, spanning the growing impact of AI in accelerating sales automation, the increasing consolidation of the sales tech stack, the role of activity capture across channels, the evolution of CRM from systems of record to systems of action, and the growing importance of security across end-to-end sales interactions.



01

**Trend One:
Artificial Intelligence
and Sales Automation**



Trend One: Artificial Intelligence and Sales Automation

AI will accelerate sales automation—Automating manual and repetitive sales tasks and processes will accelerate as companies adopt AI, machine learning, and other innovative technologies. Companies will prioritize streamlining inefficiencies across lead qualification, SDRs, RevOps, sales playbooks, discounting, and negotiation through automation. As a result, team members will be empowered to redirect efforts toward cultivating relationships and other value-added initiatives.

AI and machine learning within next-generation AI-powered revenue intelligence platforms empower forward-looking companies to automate manual and repetitive sales tasks and processes—enabling sales teams to redirect their efforts toward cultivating relationships and closing deals. In the coming year, we will see a significant uptick in companies turning to these

platforms to rapidly streamline and simplify processes such as identifying and prioritizing leads, automating follow-up emails, signaling subsequent actions to keep a prospect engaged, and optimizing sales workflows.

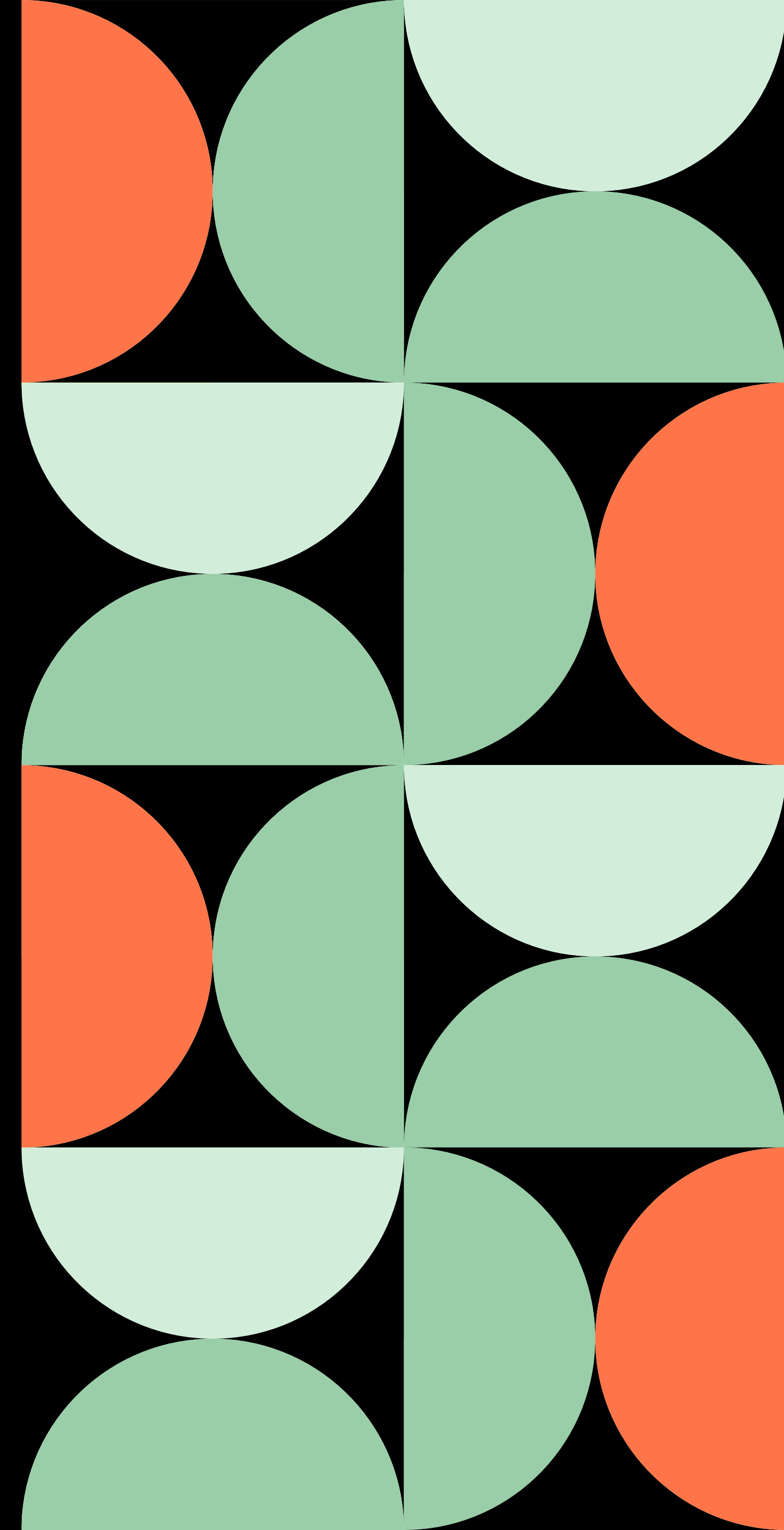
AI's impact extends to Revenue Operations (RevOps), streamlining workflows, automating routine tasks, and ensuring data accuracy across various communications channels and touchpoints. Playbooks, discounting, and negotiation processes transform as AI evaluates historical data to predict optimal pricing strategies and recommend negotiation tactics.

With the right AI-powered revenue intelligence platform, innovative companies leverage the "A" in sales force automation to gain sustainable competitive advantage in a competitive world.

RevOps is on the brink of an exciting transformation as AI takes center stage. Soon, there will be a revolution in the way organizations approach revenue generation and growth. With AI's extraordinary data management, analysis, forecasting, and customer engagement prowess, RevOps teams are poised to unlock unprecedented efficiency, effectiveness, and optimization levels.

02

**Trend Two:
Activity Capture Across
Diverse Channels**



Trend Two: Activity Capture Across Diverse Channels

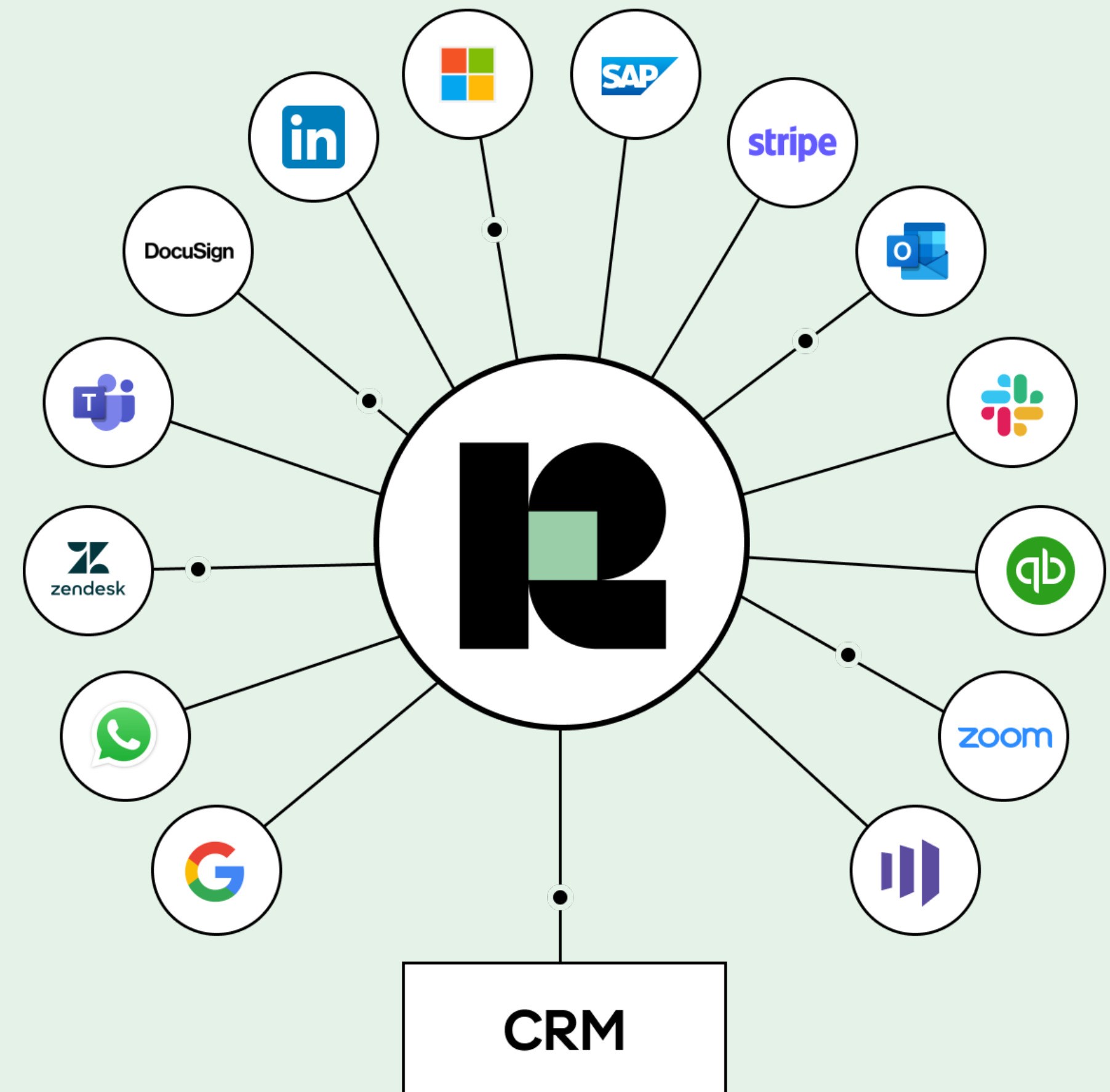
Sales will prioritize activity capture across channels—Integrating activity capture and analysis across diverse channels will become paramount in sales automation. This evolution will involve comprehensive tracking and automation of all activities across varied communication platforms, including CRM, text, voice, Zoom, and email, particularly concerning pipeline progression and outcomes. Advanced data capture, combined with AI and machine learning, will enable teams to gain valuable insights across the ecosystem of conversations and knowledge.

Businesses are moving swiftly to ensure they prioritize activity capture across channels to gain comprehensive insights at every stage of the sales pipeline. This evolution, driven by integrating conversational activity capture and analysis into next-generation revenue intelligence platforms, is set to become a mainstream approach in sales automation strategies.

The heart of this evolution is the recognition that sales interactions unfold across various

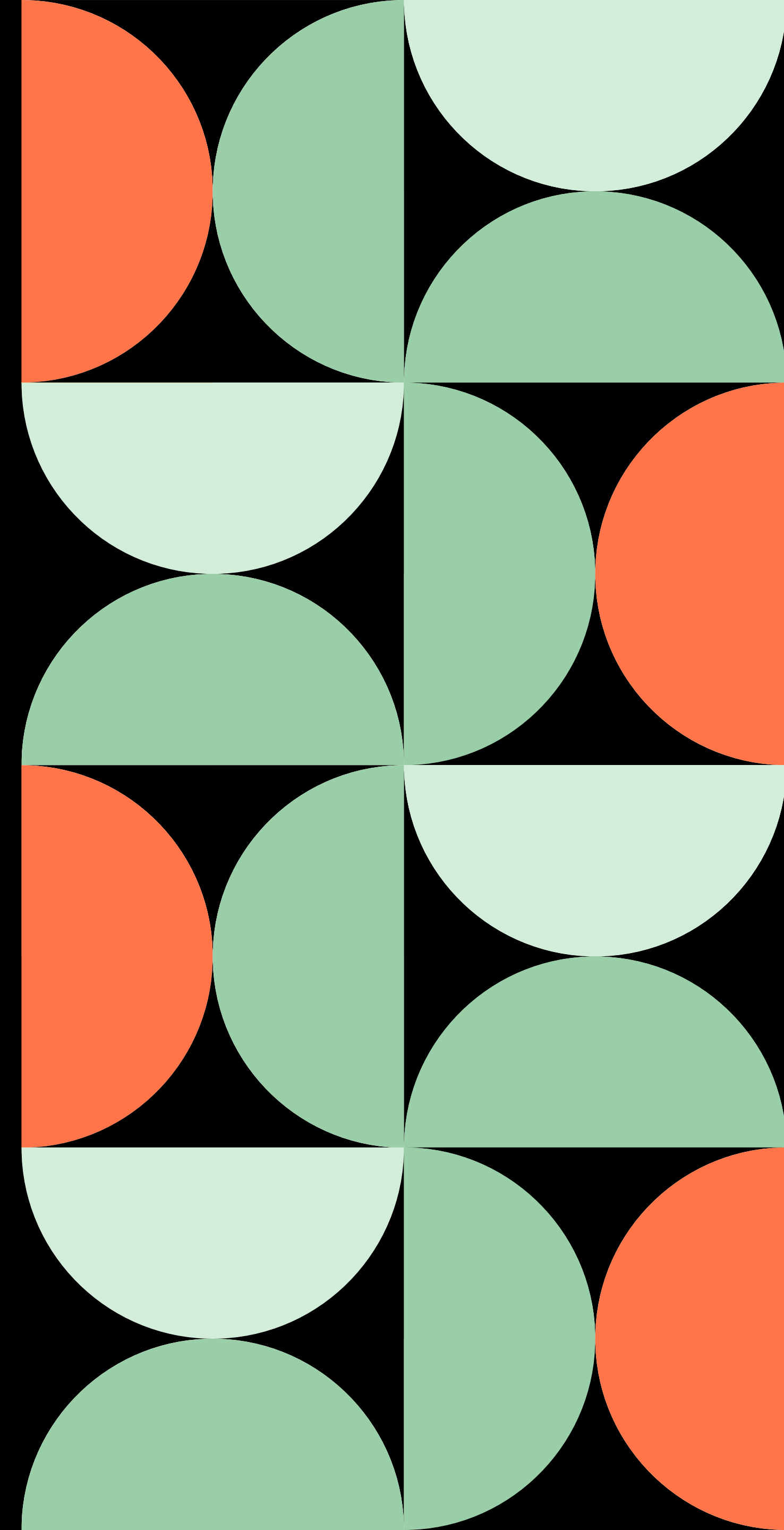
channels, from traditional CRM systems to modern communication tools. To remain competitive, companies emphasize capturing and analyzing activities seamlessly across these channels, particularly regarding pipeline progression and outcomes. This trend also directly influences the customer experience by fostering a more personalized and responsive engagement. Sales teams are armed with insights from across channels—augmented by AI-powered generative signals that suggest actions at every phase. These capabilities enable teams to tailor their approach, address customer needs proactively, and build stronger, more meaningful relationships.

As companies move to prioritize activity capture across channels, we will witness a new era of efficiency, intelligence, and customer-centricity. With advanced data capture, AI, and machine learning as part of next-generation revenue intelligence platforms, the road ahead will be about leveraging insights to forge stronger connections, drive conversions, and shape the future of sales.



03

**Trend Three:
Sales Tech Stack
Consolidation to
Focus on Quality
Data Capture**

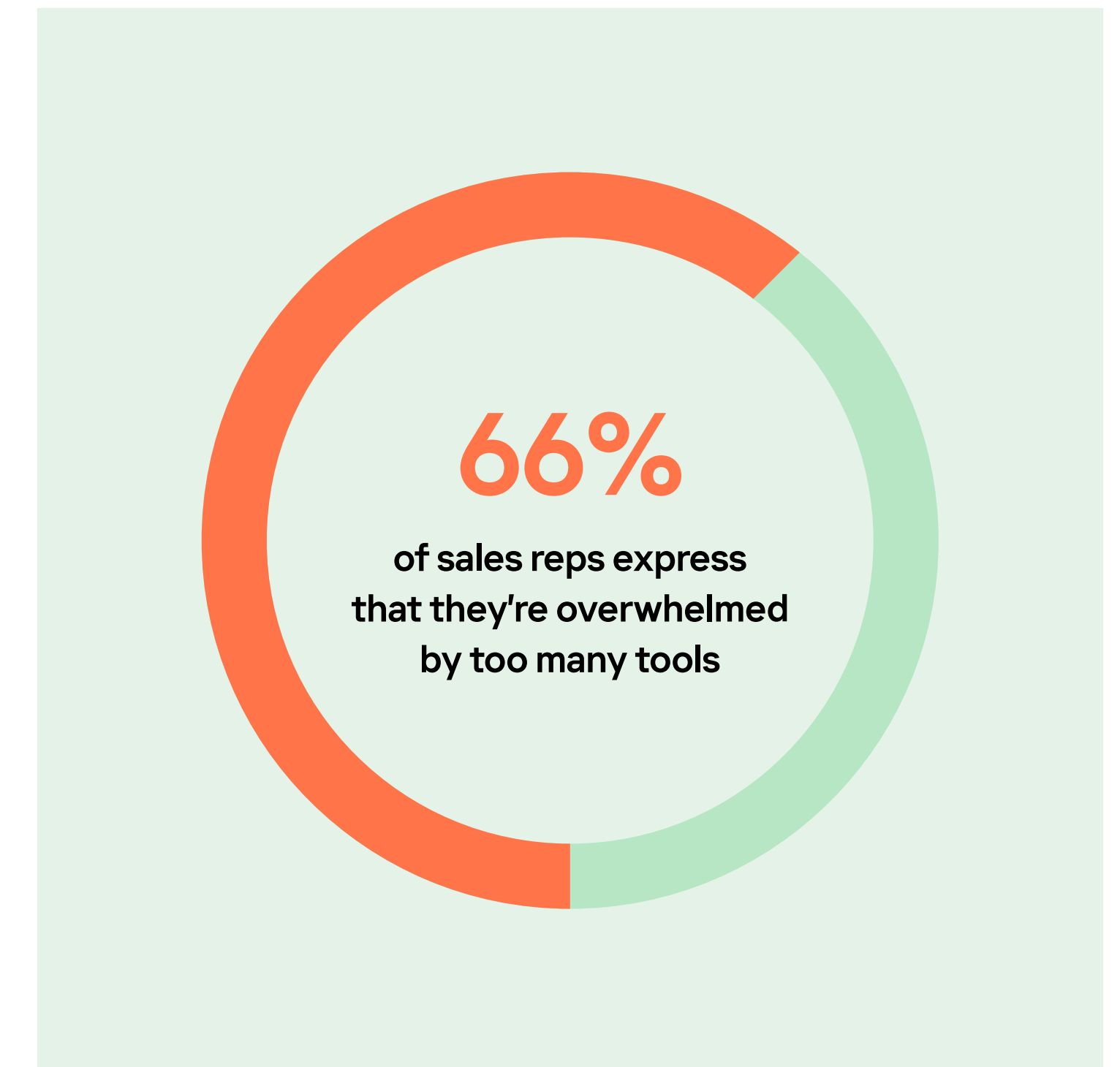


Trend Three: Sales Tech Stack Consolidation to Focus on Quality Data Capture

Amid the proliferation of overlapping sales automation tools, organizations will aggressively consolidate their tech stacks, emphasizing onboarding, training, and optimizing premium sales applications with customizable core functionalities. Companies will transition to comprehensive sales and revenue intelligence platforms that serve as unified hubs for activity capture, sales engagement, and revenue forecasting. This will further streamline labor-intensive processes, significantly lower the total cost of ownership, and empower sales teams to shift focus from application maintenance to nurturing customer relationships.

According to Revenue Grid's research, 66% of sales reps express that they're overwhelmed by too many tools, and on average, sales teams use about ten tools to close deals. This not only leads to redundancies, with multiple tools performing overlapping functions but also inflates operational costs and creates data silos, which lead to inefficiencies and inaccurate pipeline forecasting.

In the year ahead, sales tech stack consolidation will hasten as organizations aggressively simplify and optimize their sales technology landscape and revenue intelligence platforms deliver enhanced capabilities that can increase win rates. Here are some key benefits and best practices around sales tech stack consolidation.



Benefits of Sales Tech Stack Consolidation



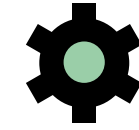
Reduce costs

By eliminating unnecessary or overlapping tools, sales teams can save on software licensing fees, maintenance costs, and integration expenses. For example, Grubhub consolidated point solutions and saved over \$1 million.



Enhance performance

Sales tech stack consolidation can also boost sales performance by leveraging the power of AI and data. By consolidating data sources and tools, sales teams can gain more accurate and actionable insights into their pipeline, forecasting, and rep performance. They can also use AI to automate repetitive tasks, prioritize opportunities, and coach sellers to quickly anticipate buyers' needs.



Improve efficiency

A leaner tech stack means less time spent on managing and switching between different tools and more time spent on selling. Sales teams can also benefit from seamless data integration across platforms, eliminating data silos and offering access to consistent, up-to-date information for strategic decision-making.



Increase customer satisfaction

Ultimately, sales tech stack consolidation can lead to more satisfied customers, as sales teams can focus more on nurturing customer relationships and delivering value rather than on application maintenance and troubleshooting. Sales teams can also use data and AI to personalize interactions, offer relevant solutions, and anticipate customer needs.

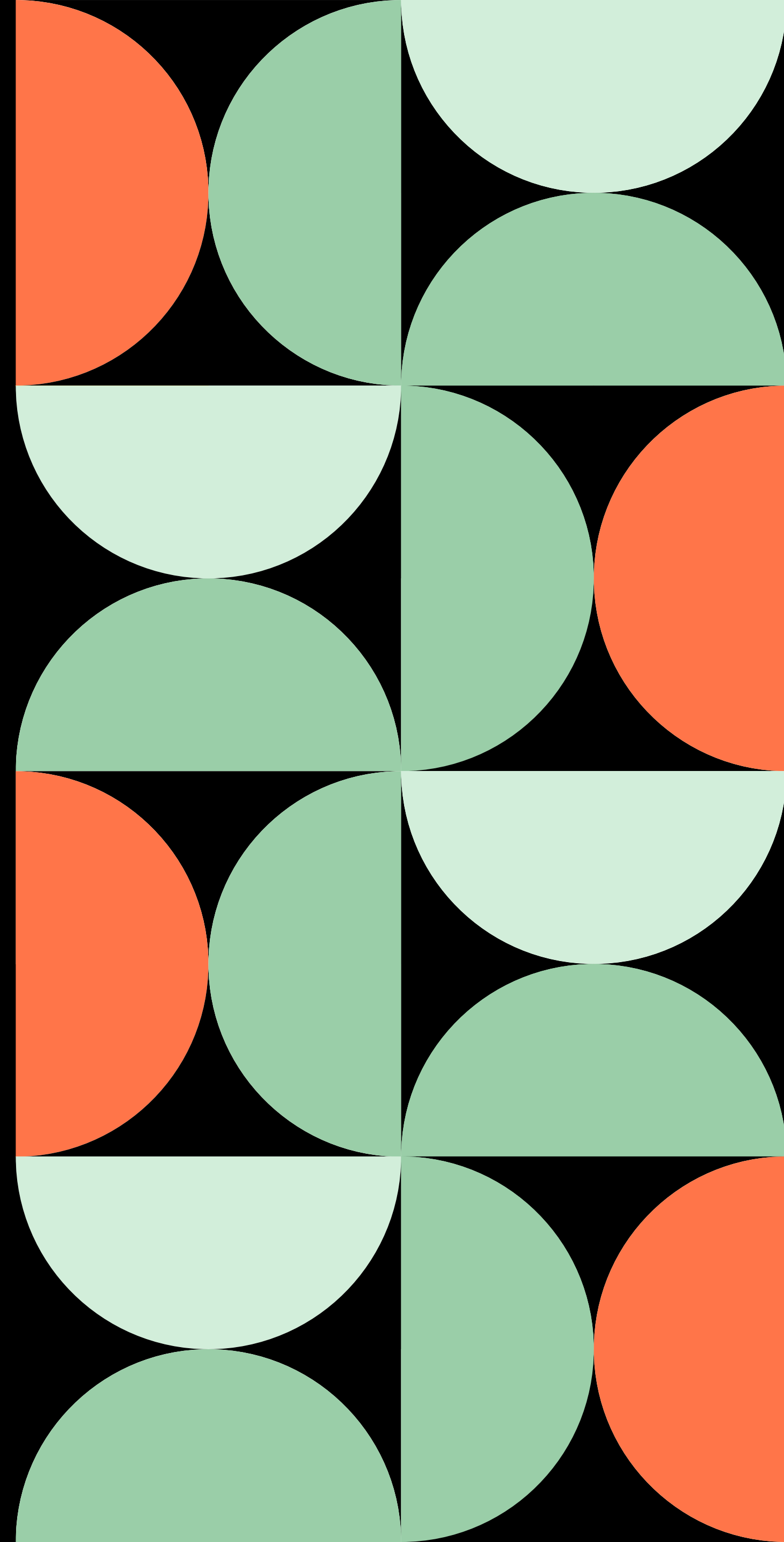
The More Quality Data Captured, the Better the AI/ML Insights.

Revenue intelligence starts with capturing digital deal signals and more of them. First, you get the data, then insights, and then you suggest actions. Getting better data alone, without burdening sellers, sometimes justifies the cost.

Gartner Research. Market Guide for Revenue Intelligence Platforms:
Published 16 January 2023. [gartner.com/en/documents/4022927](https://www.gartner.com/en/documents/4022927)

04

**Trend Four:
Actionable CRM
with AI-Powered
Generative Signals**



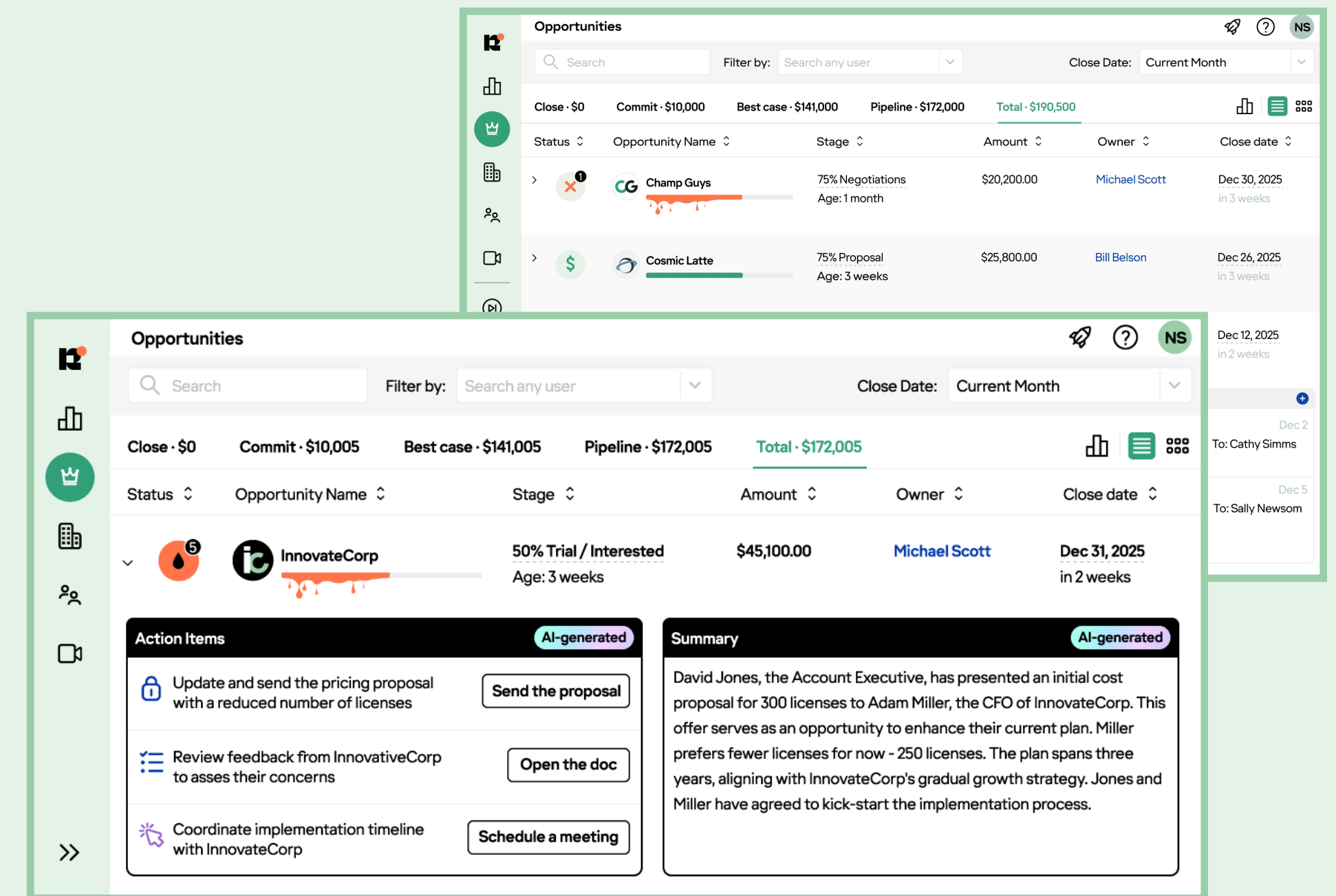
Trend Four: Actionable CRM with AI-Powered Generative Signals

CRM systems will shift from “systems of records” to “systems of actions.” AI-powered “generative signals” embedded in next-generation platforms will help sales teams identify success patterns and adapt to changing market demands. Generative signals draw from accurate data from CRM and all other customer channels to enable teams to identify winning customer engagement patterns—providing real-time, actionable recommendations to elevate sales efforts.

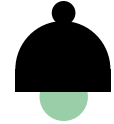
AI-powered revenue intelligence platforms should function as a sales co-pilot. For instance, AI-powered ‘generative signals’ capabilities transform data across the CRM and other communications channels into actionable insights and actions. Use generative signals to recommend tailored

content to individual users and provide instant AI summaries of opportunities, status, next steps, and personalized action items—all consolidated within a unified view.

This capability goes well beyond mainstream business tools—and draws from accurate data captured from CRM and other customer channels like WhatsApp, QuickBooks, and Zoom to identify winning customer engagement patterns. It provides real-time, actionable recommendations to elevate sales efforts—generating precise insights and guiding teams to execute the right actions at the right time. By understanding sales reps’ actions across channels, a feedback loop identifies successful strategies, highlights areas for improvement, and introduces ongoing changes to enhance performance.

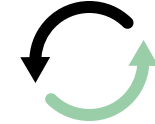


As CRM systems augmented by Generative signals transform into systems of action, sales, and revenue teams will be able to:



Sell smarter

Sales reps will make data-driven decisions and optimize their sales strategies based on real-time feedback and insights. These signals will also help sales teams avoid common pitfalls and mistakes that may cost them opportunities or revenue. For example, a generative signal may warn a sales rep that a deal is at risk of slipping or losing or that a competitor offers a better deal to the same prospect.



Sell faster

Sales reps can accelerate the sales cycle and increase productivity by automating repetitive and tedious tasks, such as data entry, scheduling, and follow-up. Generative signals will also help sales reps focus on the most important and urgent actions that will move the needle. For example, a generative signal may automate the creating and sending of proposals, contracts, and invoices or booking meetings and demos.



Sell better

Sales teams can deliver a better customer experience and build stronger relationships with prospects and customers by providing timely, relevant, personalized communication and content. Teams can adapt to changing customer needs and expectations and stay ahead of the competition. For example, a generative signal may help a sales rep upsell or cross-sell to an existing customer or request feedback or referrals from a satisfied customer.

CRM systems of actions powered by generative signals are crucial to revenue growth – now and increasingly in the year ahead. They will help sales teams leverage AI to sell smarter, faster, and better. Transition your CRM system by leveraging next-generation AI-powered revenue intelligence.

How do Revenue Grid Generative Signals impact your sales and revenue?

12%

Increase in win rate in the first year

16%

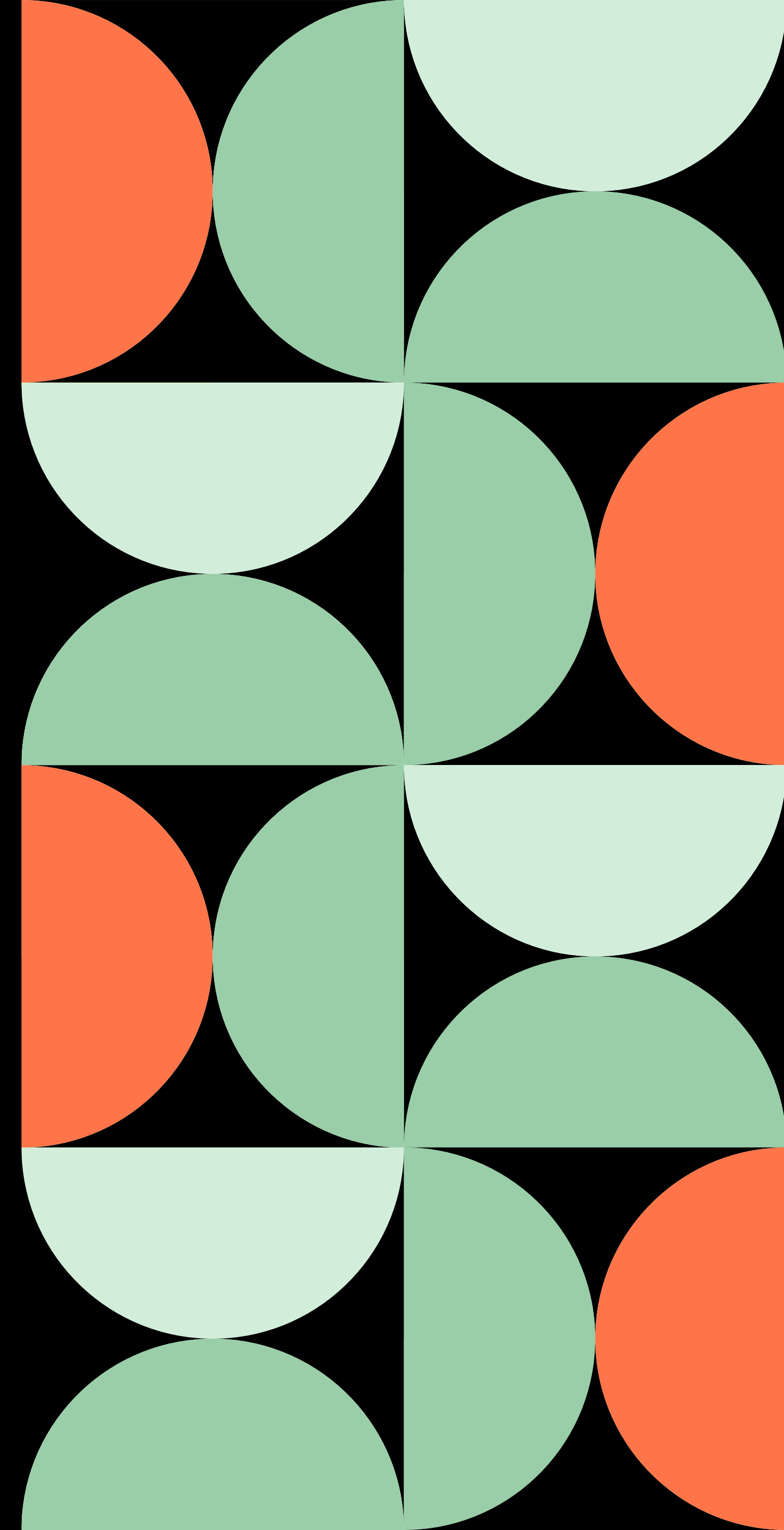
Increase in win rate in the first year

21%

Increase in win rate in the first year

05

**Trend Five:
Security Playing a
Key Role in Securing
End-to-End Interactions**



Trend Five: Security Playing a Key Role in Securing End-to-End Interactions

With generative AI becoming essential to revenue intelligence platforms, attention will increase to protect and secure end-to-end sales interactions. This will include sophisticated processes and technologies that prevent exposing training data or other data points that should remain confidential. Security professionals will increasingly place proper controls around fine-tuned machine learning models and associated products. Security is vital in supporting revenue intelligence by safeguarding critical business assets, ensuring data integrity, and maintaining customer and stakeholder trust. With the advent of generative AI, this will strengthen.

Security and revenue intelligence are closely intertwined, and an effective security strategy is fundamental to the success of revenue generation. As technology advances, robust security practices become even more critical to safeguard sensitive sales and customer data. Organizations will likely prioritize security as an integral part of their sales automation strategies to mitigate risks and build customer trust, mainly as AI plays a more significant role.



Here's how security plays a crucial role in supporting revenue intelligence:



Data Integrity and Accuracy

Security measures protect data from unauthorized access, manipulation, or corruption. Ensuring the integrity of data used for revenue intelligence is essential for making accurate business decisions. Any compromise to data integrity could lead to misleading insights and decisions.



Customer Trust and Confidentiality

Handling customer data carefully is crucial for maintaining confidentiality and protecting against data breaches. This builds and retains customer trust, especially when analyzing customer data for revenue intelligence purposes.



Data Security

Revenue intelligence relies on digital data, making it susceptible to cyber threats like hacking, phishing, or ransomware attacks. Implementing effective cybersecurity measures is essential to prevent unauthorized access, data theft, and other malicious activities that could impact revenue-related insights.



Compliance with Regulations

Businesses must comply with data protection and privacy regulations. This not only fulfills their legal obligations but also helps maintain the accuracy and reliability of revenue intelligence. Compliance ensures businesses handle customer and financial data responsibly, preventing legal consequences that could harm revenue.



Protecting Intellectual Property

Revenue intelligence often involves analyzing proprietary information and market strategies. Security measures protect intellectual property from theft or unauthorized access, preserving a company's competitive advantage and revenue-generating capabilities.



Secure Transactions

Revenue intelligence, financial transactions, and data accuracy are critical. Security protocols, including encryption and secure communication channels, ensure that transactions are conducted securely, reducing the risk of errors or fraudulent activities.

Conclusion

The missing 'A' in Sales Automation will transform profoundly in 2024, driven by AI and machine learning advancements. Beyond automating manual and repeatable tasks, AI-powered revenue intelligence platforms will swiftly aggregate and interpret activities across CRM and all communication channels, discern patterns, and act as co-pilots that empower teams with actionable intelligence—all while prioritizing security at the core.

Swift adaptation to market changes will be crucial to success in 2024. Businesses that promptly adapt to innovations and adjust accordingly will gain a competitive edge. This agility is critical to navigating dynamic market scenarios, fostering competitive advantages, and driving sustained growth.

For more information about Revenue Grid, please visit us at revenuegrid.com.