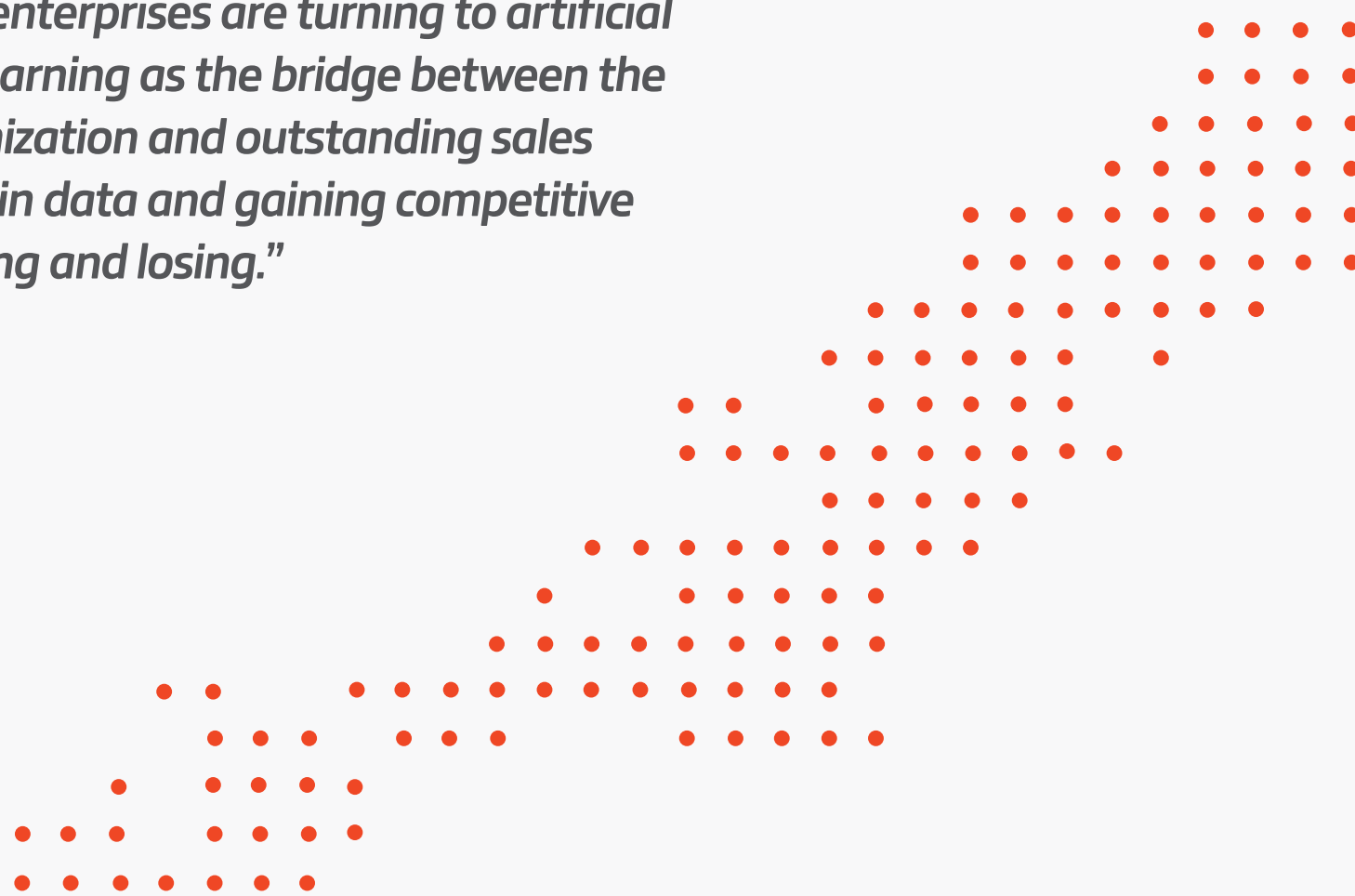
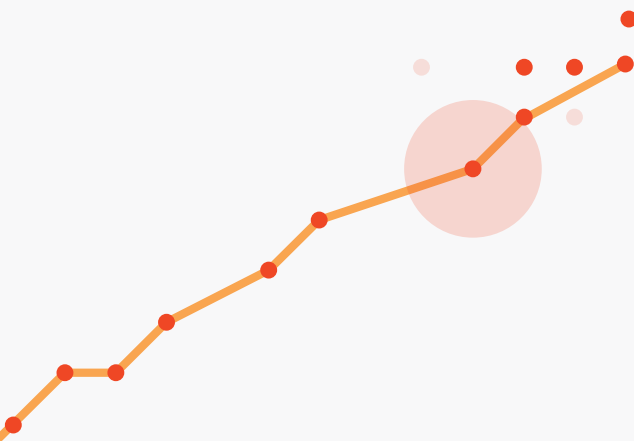


Actionable Intelligence that Accelerates Profitable Growth

An Introduction to
Zilliant IQ™ for Salesforce®



“Across industries, leading enterprises are turning to artificial intelligence and machine learning as the bridge between the limitations of human organization and outstanding sales results, between drowning in data and gaining competitive advantage, between winning and losing.”



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Introduction

There is a lot of buzz around the potential benefits and impacts of artificial intelligence (AI) on businesses.

Yet, it's not always 100% clear what AI is and how it can be used as a strategic lever to drive business performance.

This eBook:

- Defines AI and covers the benefits to B2B companies
- Explains how AI unlocks value from data to drive business results
- Specifies where B2B companies should focus to capitalize on AI
- Identifies complex business environments where companies can immediately benefit from AI solutions
- Outlines the benefits of integrating Zilliant IQ and Salesforce

What is Artificial Intelligence?

AI is the capability of a machine to imitate intelligent human behavior.

While many terms describe AI techniques, it's the applications and use cases that are important for business leaders to understand.

In general, AI can:

- Anticipate requests
- Automate tasks
- Uncover and highlight valuable information to users



AI Techniques

Artificial Intelligence

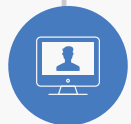
The concept of a machine capable of imitating intelligent human behavior

Machine Learning

The development of computing systems that can learn, adapt and solve when exposed to new data

Deep Learning

An advanced technique of machine learning that uses neural network structures to learn with little to no human supervision



Natural Language Processing (NLP)

Deals with programming computers to successfully process natural human language



Predictive Analytics

Uses many techniques and algorithms including data mining, statistics and modeling to analyze data to make predictions about the future



Prescriptive Analytics

Applies mathematical and computational sciences to recommend the best paths forward based on the constraints and objectives of a situation



Contextual Analytics

Enriches analytics with role- or situation-relevant information in the context of the person or thing making the decision at a point in time

Application Examples

Benefits of Using AI

AI is the next major wave of innovation, driven by:

- Advances and ease of access to computing power
- Cloud data storage capabilities and more flexible data models
- Internet and interconnectivity of everything (IoT)

For most B2B companies, this means that implementing AI-enabled software solutions is already a reality.

With AI, businesses can deliver more effective customer experiences across sales, service and marketing interactions.

Benefits to B2B Companies:

- Enhance customer experience
- Deeper analytics and insights
- Informed decisions made faster
- More efficient and enabled workforce
- Increase customer satisfaction and loyalty
- Improve revenues, margins and profits



85% of enterprise executives will invest extensively in AI-related technologies over the next three years.
-Accenture

Unlocking Value from Data

There are many use cases for AI across sales and marketing processes.

Many AI solutions focus on predictive marketing techniques to increase the identification and conversion of new prospects and leads.

A common challenge with these types of solutions is the poor quality of the prospect and the customer data that these models consume.

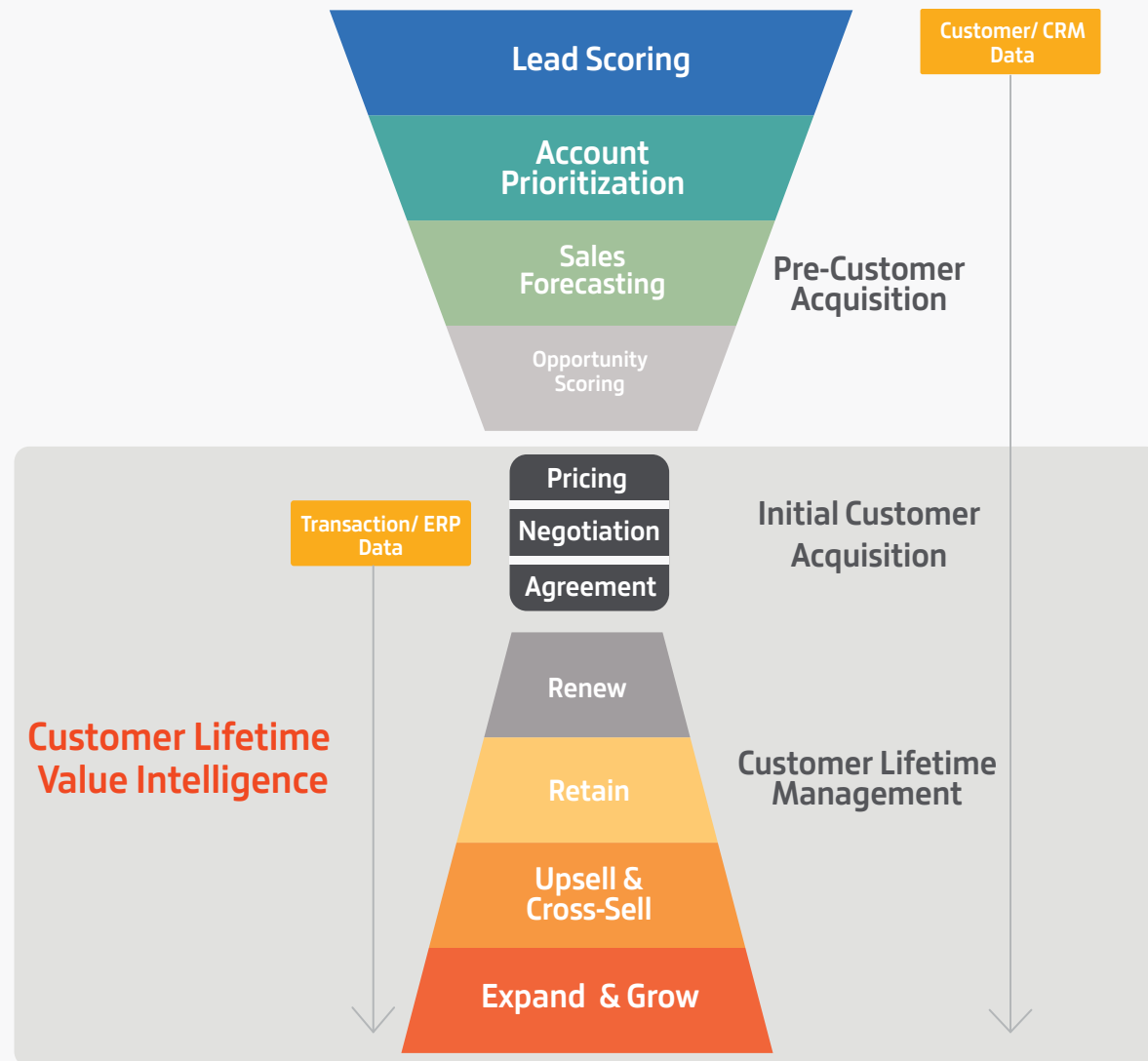
Typically, one of the cleanest data sources in B2B is customer transaction data, which usually resides in ERP systems.

By applying AI to all available customer and transaction data, B2B companies can more accurately identify and prescribe actions to drive business performance and customer relationships.

This is called Customer Lifetime Value Intelligence.

CLV Intelligence helps business leaders easily see the most efficient path to achieving revenue and margin goals, and maximize customer lifetime value.

CLV Intelligence flips the marketing and sales funnel by placing customers at the center instead of prospects.

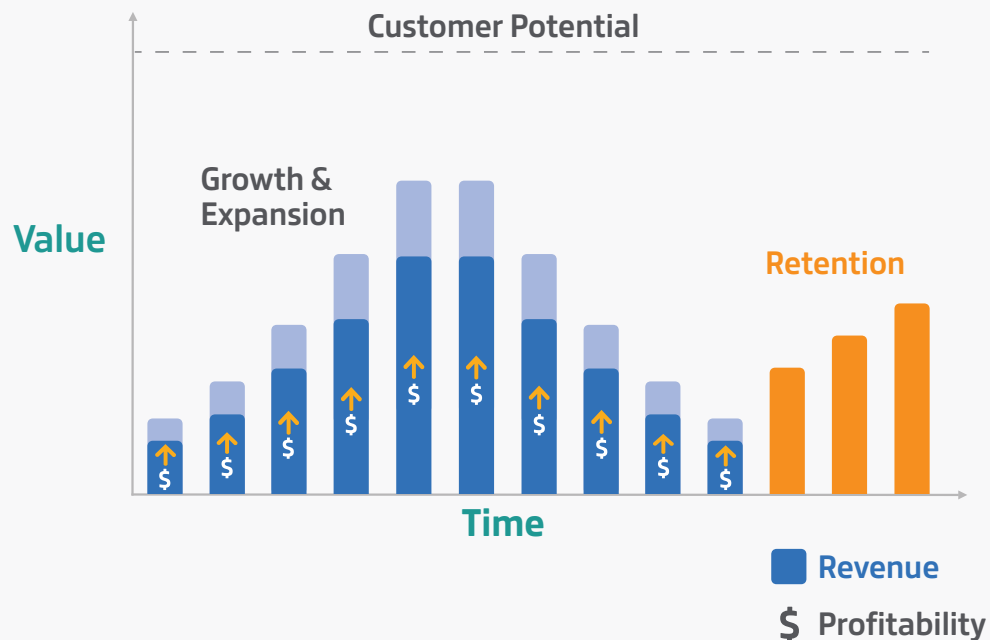


What is Customer Lifetime Value?

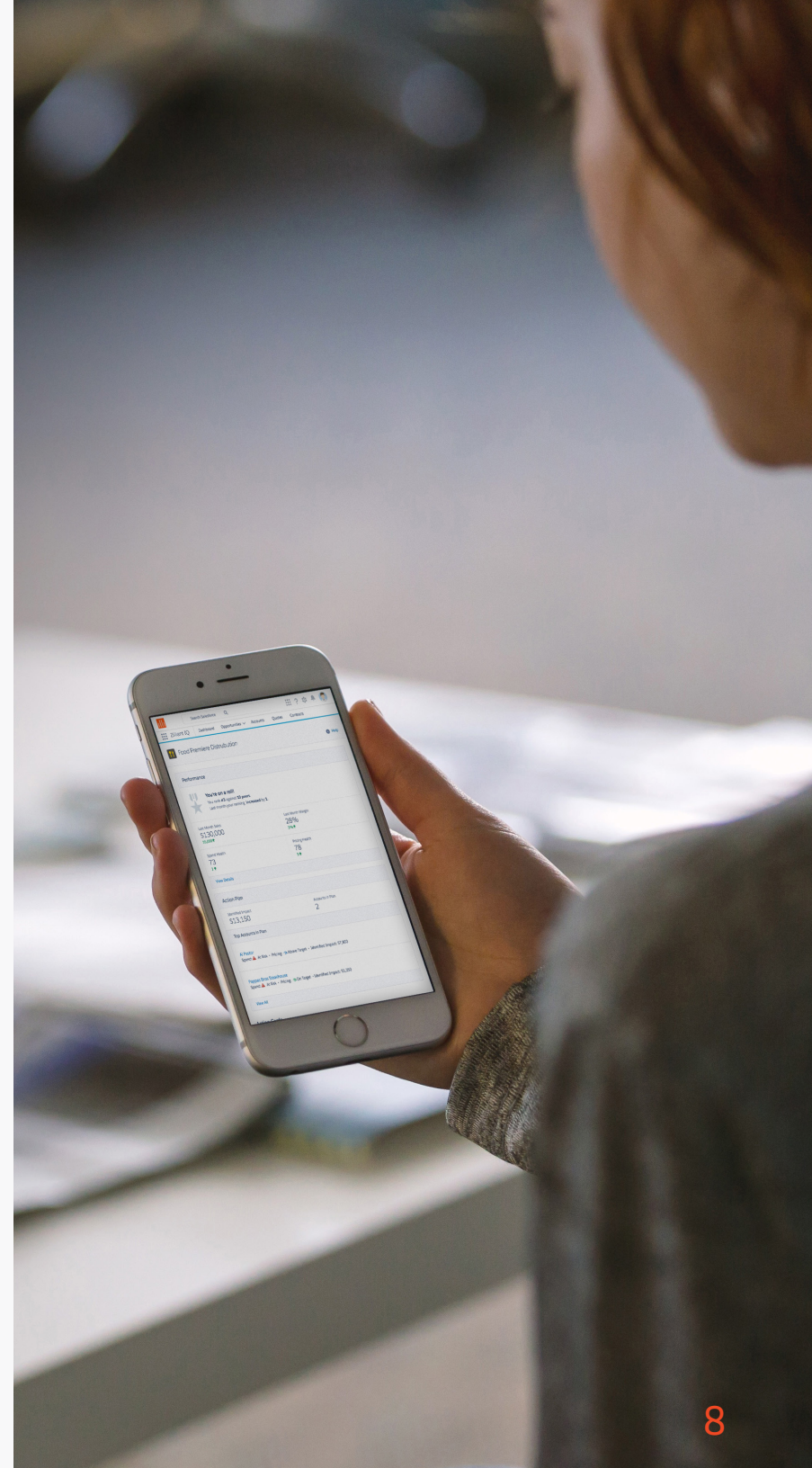
Customer Lifetime Value (CLV) is the economic value a business will derive from their entire relationship with a customer.

There are 3 primary ways to maximize CLV:

1. Grow and expand products and services purchased
2. Retain relationships for a longer time
3. Increase profitability through pricing and cost to serve

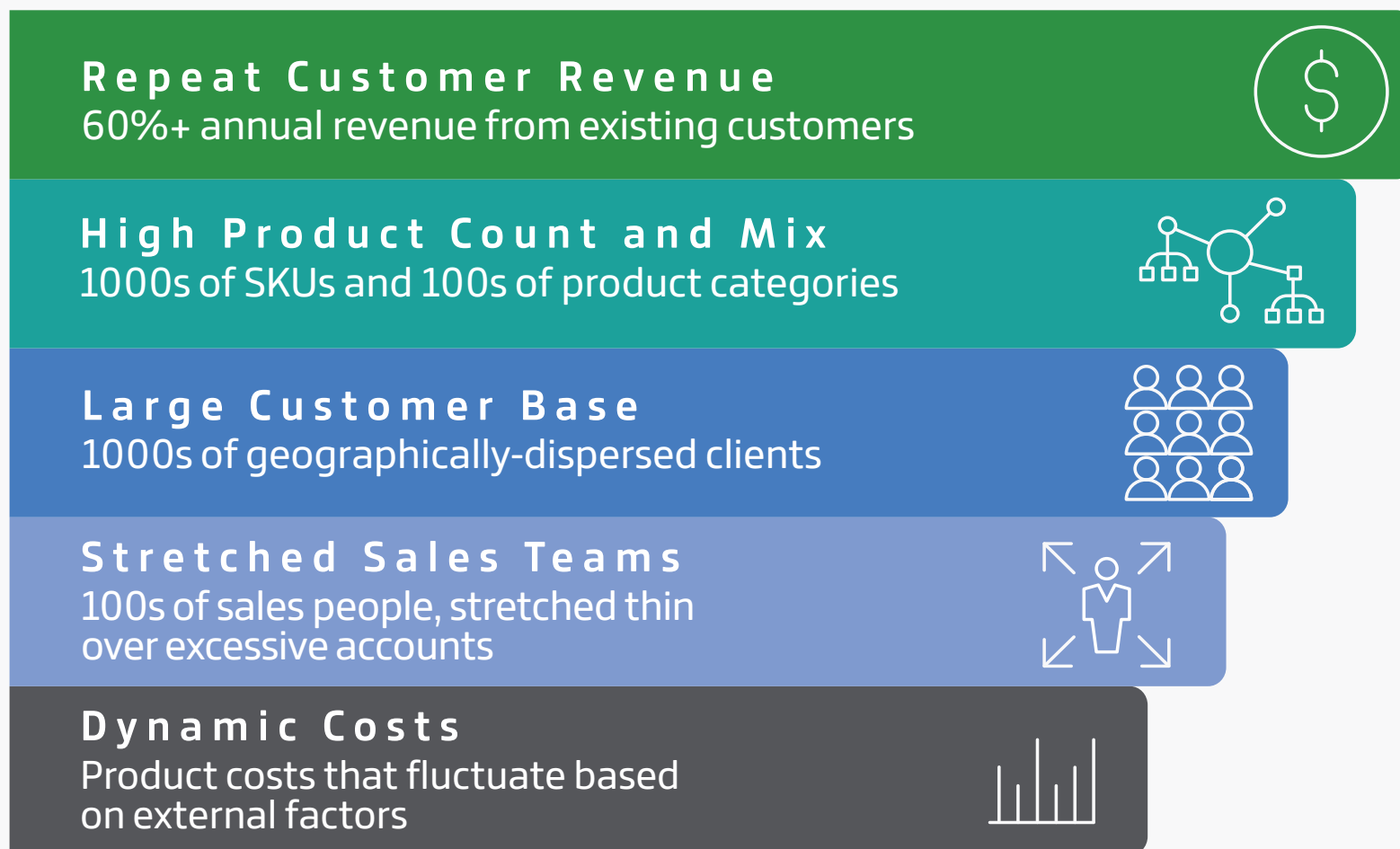


Read on to learn more about the types of companies that can immediately benefit from applying AI to maximize CLV.



Solving Business Complexity

Regardless of industry, complex businesses with these common characteristics can immediately benefit from applying AI to maximize CLV.



The next section of the eBook outlines Zilliant IQ for Salesforce, and how the two solutions work together to maximize the lifetime value of B2B customer relationships.

Zilliant IQ for Salesforce

Zilliant IQ maximizes the value of every customer interaction with a unique blend of intelligence and action.

Zilliant IQ Anywhere

Zilliant IQ's open architecture and integration framework incorporates the AI-derived, prescriptive intelligence within eCommerce, CRM, CPQ and other customer-focused touchpoints, enhancing the economic value of every B2B customer interaction.

Zilliant Action IQ™

Zilliant Action IQ delivers prescriptive intelligence to every sales person, generating targeted action plans for each customer, and enabling them to maximize business with existing accounts.

Zilliant IQ Manager

Zilliant IQ Manager gives you control to drive your business strategy by intuitively mapping objectives to the AI guidance that gets executed.

Zilliant IQ Engines

Using advanced AI, machine learning techniques, and sophisticated predictive models to quantify the true economic potential of every customer, the Zilliant IQ Engines intelligently prescribe actions that drive the best revenue and margin outcomes.

Zilliant IQ Platform

Zilliant IQ Anywhere
Omnichannel Activation



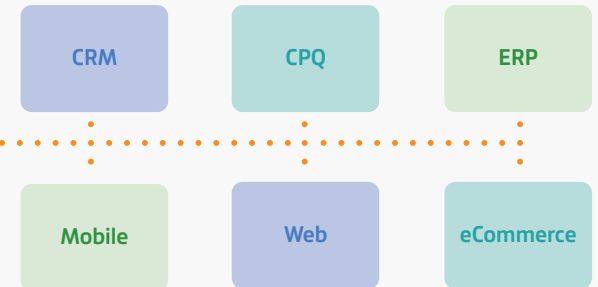
Zilliant Action IQ
Drive Sales & Pricing Actions



Zilliant IQ Manager
Map Strategy to Execution Across
All Channels



Zilliant IQ Engines
AI & Prescriptive Insights



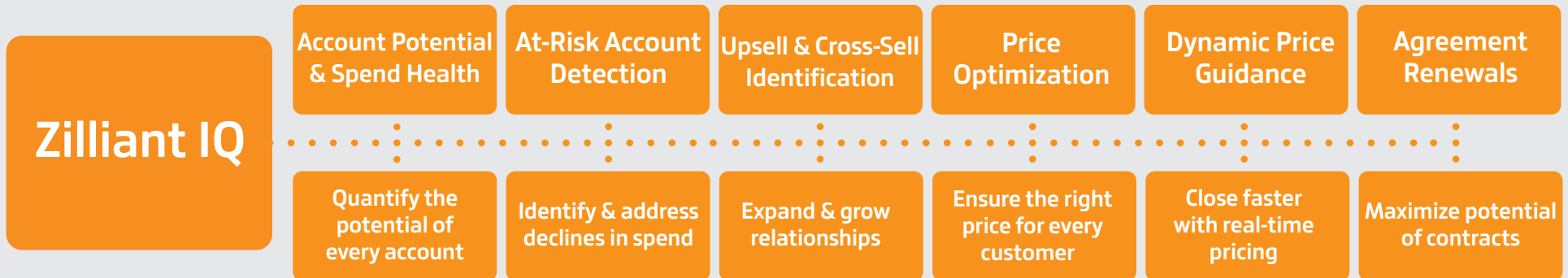
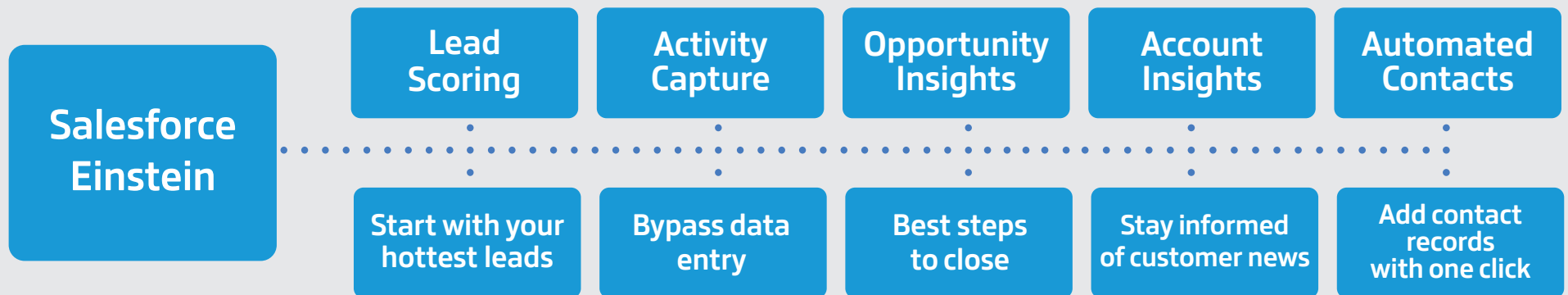
Zilliant IQ for Salesforce

Integrate actionable intelligence that accelerates profitable growth natively within Salesforce workflows, expanding the ROI of your investments.

AI for Sales Productivity

Salesforce Einstein® and Zilliant IQ help your sales team focus on and grow the most important thing - your customers.

Salesforce Sales Cloud®



Zilliant IQ creates insights derived from transaction data often housed outside of Salesforce. It natively integrates and drives actionable insights in the CRM alongside Salesforce Einstein.

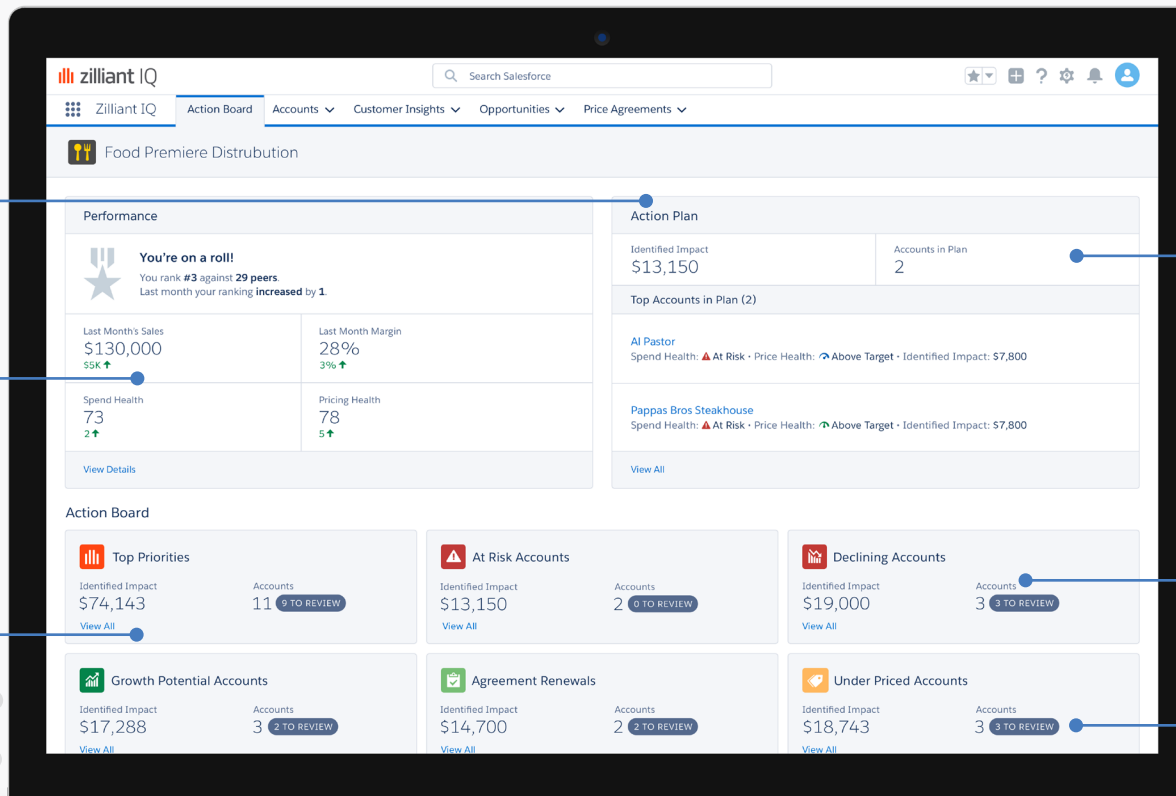
Provide Actionable Sales Guidance

Within the Zilliant IQ platform, Action IQ is the solution that delivers actionable insights and account-specific guidance to sales representatives.

Identify the most reliable and predictable path to hitting sales targets on a regular basis

Quickly monitor and track territory performance, goal attainment and customer spend health

Surface hidden opportunities at scale with actionable, customer-specific insights for growth and recovery



Continuously generate AI-enriched sales guidance based on customer transaction activity

Prevent lost customers by identifying accounts with the greatest propensity to defect and at-risk accounts

Capture additional profit with price insights and agreement alerts

Create Intelligent Account Plans

Zilliant IQ generates a targeted action plan for each customer, spanning optimal product mix, optimal price, price agreements, and expansion and retention strategies.

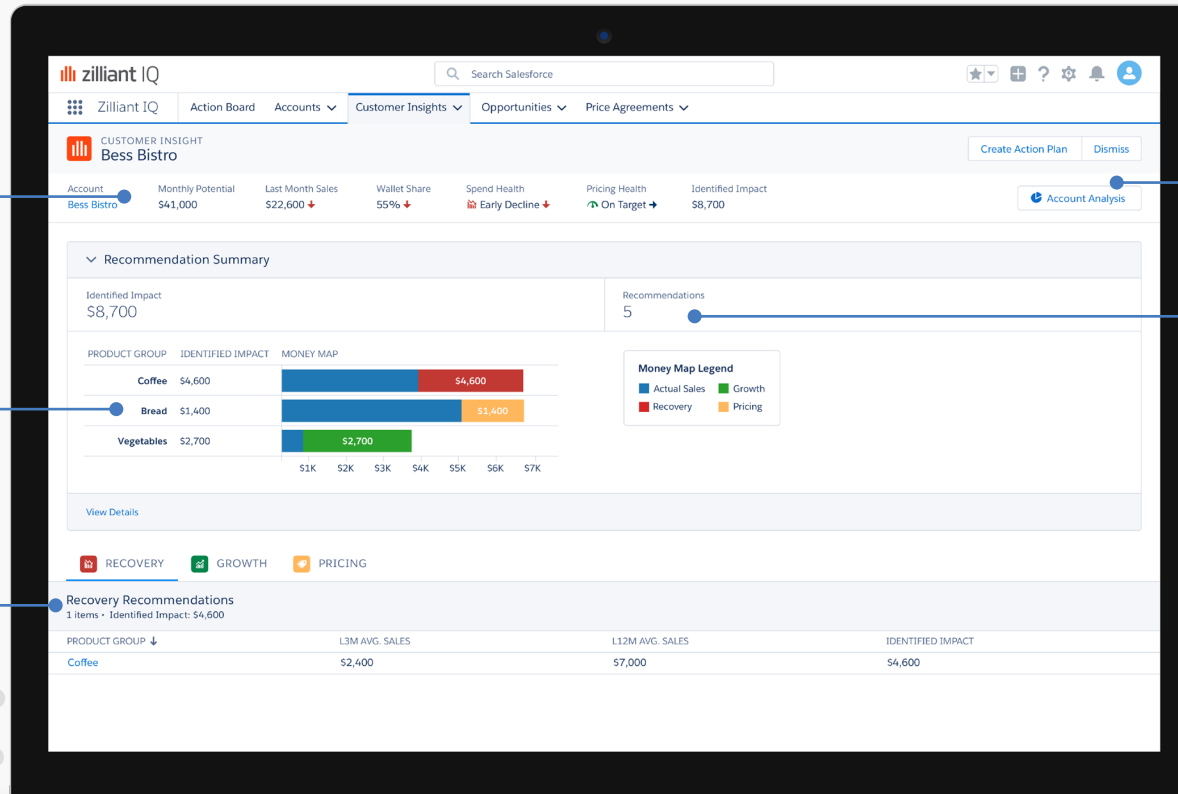
Capture additional wallet share by identifying the true economic potential of every customer

Generate opportunities to maximize the lifetime value of existing accounts through growth, recovery, pricing and deal profitability guidance

Eliminate product-catalog and price-list fatigue by identifying specific SKUs and market-aligned pricing amidst thousands of possible products

Increase win rates and seller confidence by providing in-line, contextual analytics to support and guide at the right time

Skip the complexity and quickly identify the most important value-added conversations to have with customers



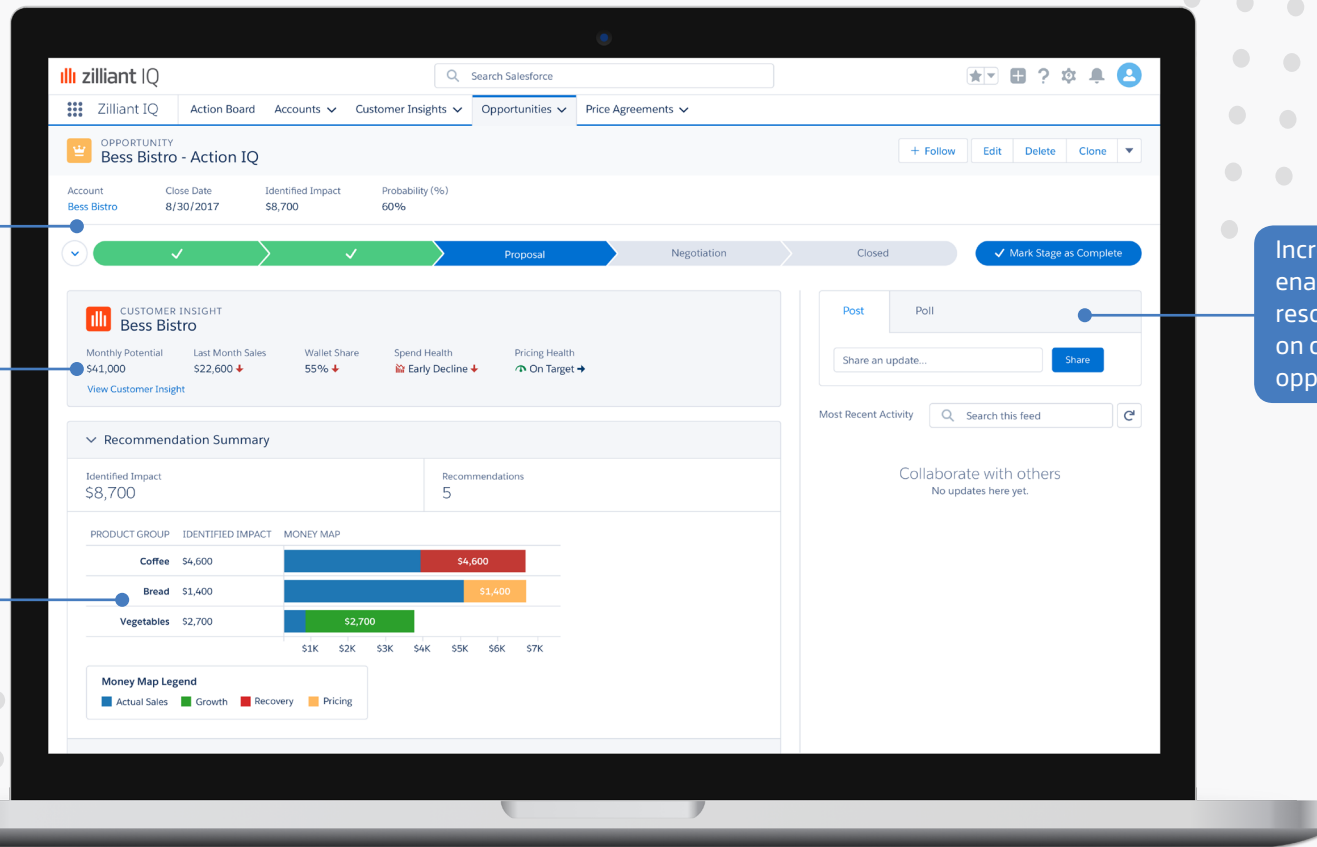
Increase Salesforce Adoption

Zilliant Action IQ natively integrates actionable intelligence within Salesforce workflows to create additional value for enterprises.

Increase Salesforce adoption by seamlessly integrating Zilliant IQ intelligence into standard sales workflows

Reduce sales data entry by fluidly converting Zilliant insights into Salesforce opportunities

Keep opportunities top-of-mind with sales reps by maintaining customer-specific guidance throughout the sales process

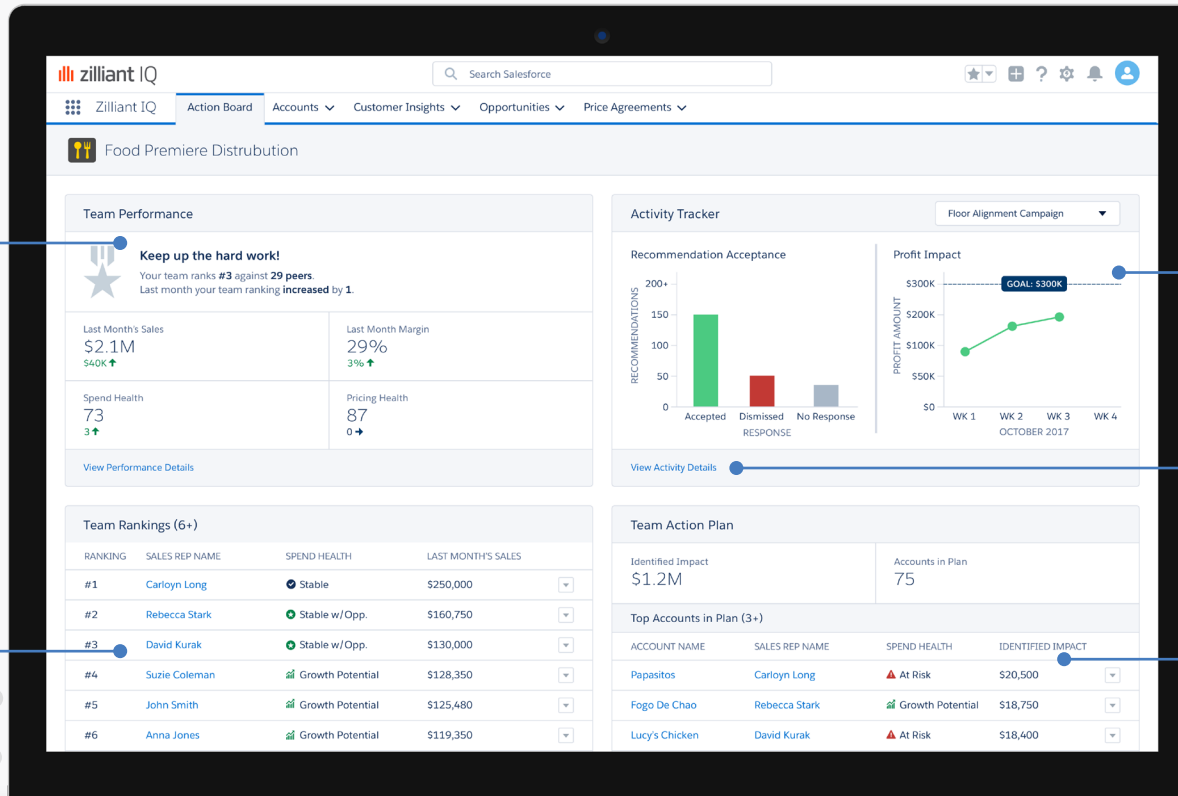


Increase win rates by enabling sales and key resource collaboration on customer insights and opportunities

Improve Sales Performance Management

Zilliant IQ identifies for senior management the most actionable paths to hitting revenue and margin targets.

Quickly assess performance, goal attainment and customer health



Drive business objectives by tuning sales guidance aligned to market share, profit or campaign goals

Increase sales team effectiveness with AI that delivers guidance to every sales person

Increase sales performance by enabling every sales resource to act like your best, most consultative rep

Achieve quarterly targets by managing sales pipelines and action plans

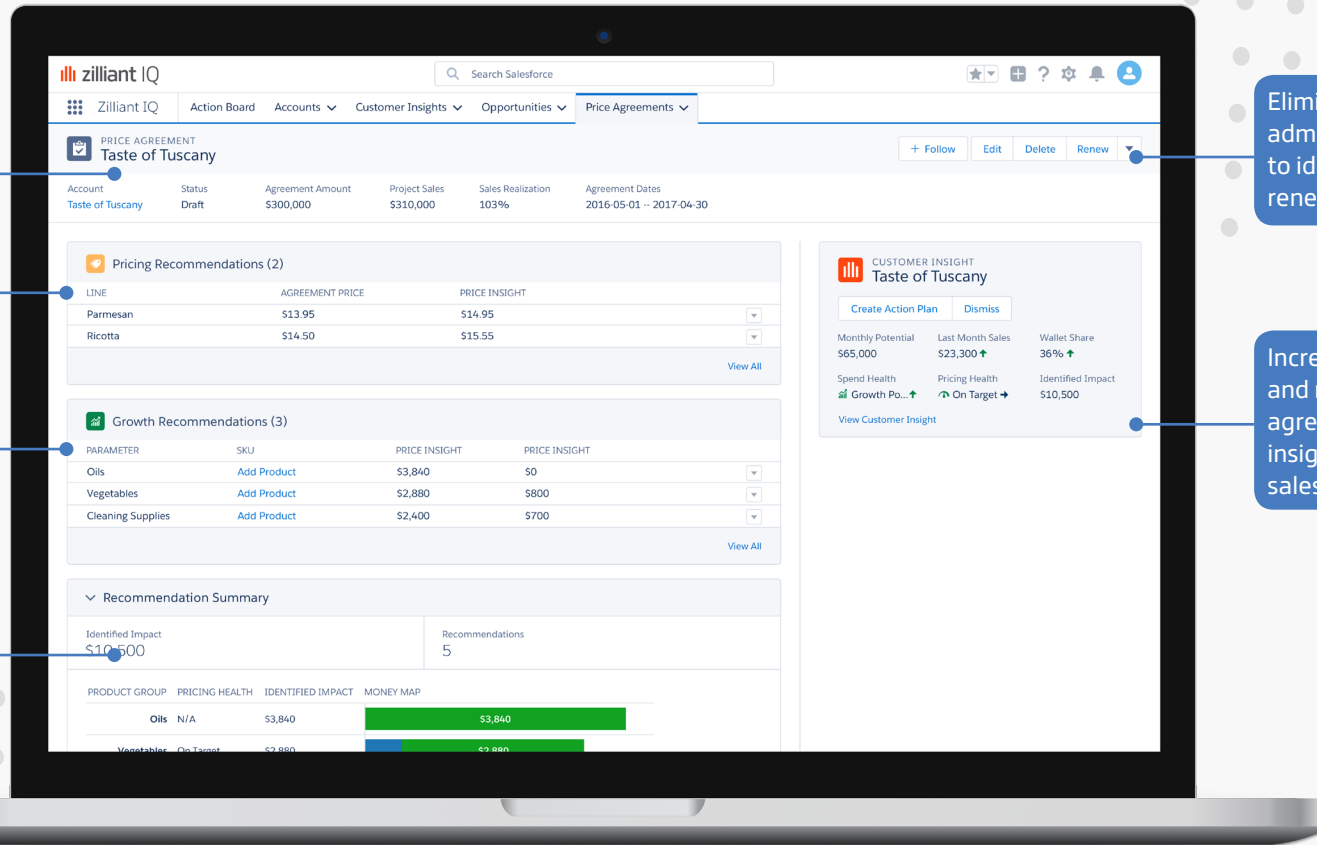
Capitalize on Contract & Agreement Renewals

Zilliant IQ transforms transaction and contract data into unmatched guidance for capturing the economic potential of each existing customer.

Maximize the lifetime value of customer contracts and agreements

Increase sales productivity by surfacing specific contract items needing review and action

Easily identify value-added conversations based on customer-specific insights that increase wallet share and margin



Eliminate unnecessary sales administrative tasks related to identifying and renewing contracts

Increase revenue potential and renewal of customer agreements by integrating insights into standard sales workflows

Optimize Price in Salesforce CPQ

Zilliant IQ ensures every price in Salesforce CPQ is the right, optimal price for every selling situation and every customer.

Simplify complex quotes and orders by dynamically optimizing line-item pricing with order-level targets

Increase sales confidence by providing pricing guidance based on each customer's unique profile

Improve the customer experience with consistent pricing delivered across all touchpoints including CPQ and eCommerce

The screenshot shows the Zilliant IQ Quote Line Editor interface. At the top, there's a search bar and navigation tabs for Zilliant IQ, Action Board, Accounts, Customer Insights, Opportunities, Price Agreements, and Quotes. Below this, the 'Quote Information' section includes fields for Target Customer Amount, Expires On (10/14/2017), Approval (with a warning icon), Net Revenue (\$2,219.00), Price Quality (with a color-coded bar), and Target Revenue (\$2,239.00). The main part of the interface is a table with columns: PRODUCT CODE, PRODUCT GROUP, START, TARGET, UNIT PRICE, QUANTITY, FIXED, NET REVENUE, TARGET REVENUE, PRICE QUALITY, APPROVAL, PRODUCT SOURCE, and ACTIONS. The table contains six rows of quote items. At the bottom, there are two revenue totals: \$2,219.00 and \$2,239.00.

PRODUCT CODE	PRODUCT GROUP	START	TARGET	UNIT PRICE	QUANTITY	FIXED	NET REVENUE	TARGET REVENUE	PRICE QUALITY	APPROVAL	PRODUCT SOURCE	ACTIONS
1 Windex	Cleaning Supplies	\$6.80	\$6.20	\$6.20	20		\$124.00	\$124.00	F T S	✓	SX Growth	🔍 ⚙️ ⭐ 🗑️
2 Italian Olive Oil	Oil	\$11.00	\$10.50	\$10.50	30		\$315.00	\$315.00	F T S	✓	SX Growth	🔍 ⚙️ ⭐ 🗑️
3 Floral Paper	Paper	\$5.50	\$5.00	\$5.00	10		\$50.00	\$50.00	F T S	✓	SX Growth	🔍 ⚙️ ⭐ 🗑️
4 Green's Spinach	Vegetables	\$8.75	\$8.50	\$8.50	30		\$255.00	\$255.00	F T S	✓	SX Growth	🔍 ⚙️ ⭐ 🗑️
5 Parmesan	Cheese	\$5.90	\$5.50	\$5.30	100		\$530.00	\$550.00	F T S	⚠️	SX Pricing	🔍 ⚙️ ⭐ 🗑️
6 Ricotta	Cheese	\$19.20	\$18.90	\$18.90	50		\$945.00	\$945.00	F T S	✓	SX Pricing	🔍 ⚙️ ⭐ 🗑️

Accelerate quote turnaround time with real-time approval guidance and more intelligent thresholds

Increase customer and deal profits without risking volume with prices based on price sensitivity models

Dynamically deliver market-, value- and cost-aligned prices to ensure business objectives and customer expectations

Accelerate Profitable Growth with Zilliant and Salesforce

Zilliant helps B2B enterprises turn data into actionable intelligence that accelerates profitable growth.

The Zilliant IQ™ Platform uses AI to deliver actionable, real-time sales and pricing intelligence for traditional and digital channels, so you can maximize the immediate value of every transaction – and the lifetime value of every customer. Because when customer lifetime value is maximized, profits are accelerated, competitive advantage is created, sales performance is improved, and sustaining organizational success is achieved.

Learn more at www.zilliant.com or follow @Zilliant

