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Sales Technology

Optimizing your Success



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SALES RESEARCH AND DATA MANAGEMENT

What do your teams use to research opportunities?

- ❖ ZoomInfo
- ❖ Apollo.io
- ❖ Sales Navigator (LinkedIn)
- ❖ MailChimp
- ❖ Clearout (email verification)
- ❖ Other...

What CRM systems are you finding most effective overall?

- ❖ HubSpot
- ❖ Salesforce
- ❖ pipedrive
- ❖ ZOHO
- ❖ Other...



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AI in Operations, Sales, and Account Management

How do you use AI in your sales programs?

How does AI integrate with your operational and sales tech stacks?

What AI platforms are you using with the most success? What problems are they solving?

- ❖ ChatGPT
- ❖ Perplexity
- ❖ Grok
- ❖ CoPilot
- ❖ Other...



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AI in Operations, Sales, and Account Management

In what areas do you find using AI delivers the most value?

- ❖ Proposal Writing
- ❖ Marketing Materials
- ❖ Other...

What process do you use to train your model?

What ethical considerations and safeguards have you put in place to protect client and proprietary information?



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OBT's and Expense Management Software

Are you finding it better to maintain one OBT or are you adding additional tools to increase sales exposure?

- ❖ Concur
- ❖ DEEM
- ❖ ATRIIS
- ❖ Other...

Are you trying to partner with other expense platforms such as: Concur (does this exist anymore?), WorkDay, Expensify, Emburse, Ramp

Are you finding an issue with the above expense platforms having their own travel tool integration or partnership (Expensify with Spotnana, Ramp - internal, Emburse - internal, etc.)?



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What other technology are you looking to incorporate into your overall operation?