



AI for Sales Forecasting & Pipeline Management

A background image for the title section showing a blurred view of a computer screen with various data visualizations, including bar charts and line graphs, in shades of blue and green.

TopOPPS Customer Impact Research Summary

Independent research conducted by Washington University in St. Louis [CElect](#) team found companies using [TopOPPS](#) AI for Sales Forecasting and Pipeline Management were able to:

- Handle 19% more opportunities per year
- Make 58% more money per sale
- Reduce sales cycles by up to 59%
- Immediately increase bookings following implementation

TopOPPS Customer Impact – Research Summary

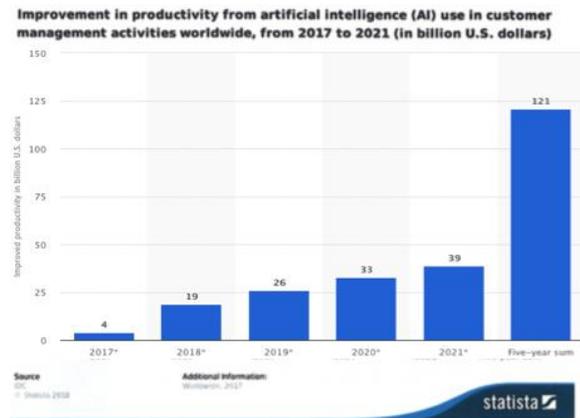
The research reviewed all TopOPPS customers in the context of:

- The market and projected market growth
- Quantitative analysis using regression analysis of customer data to determine trends and correlation of results tied to the TopOPPS solution
- Qualitative analysis doing in-depth case studies to cross-check regression analysis with business use cases

The objective of the research was to understand if the data-driven value proposition creates a significant impact on sales. A secondary objective was to determine the impact of integrating AI software into a company's sales forecasting and pipeline management system process through empirical analysis.

Market Analysis

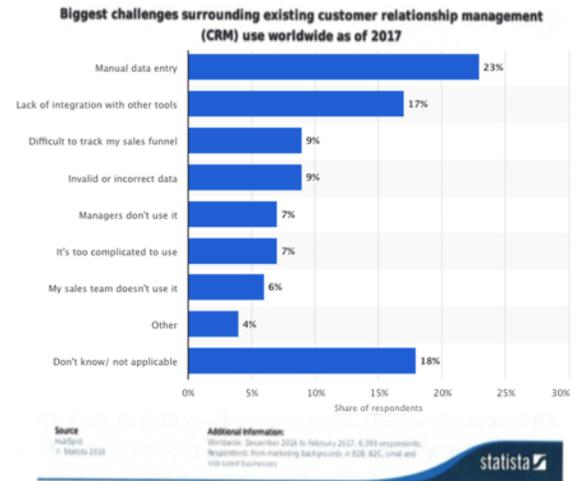
Artificial intelligence adoption in customer relationship management [CRM] will boost global business revenue from 2017 through 2021 by \$1.1 trillion.



The driving factors are data collection and efficient management of interactions with prospects and predicting prospect behavior. Combining AI with CRM result in more efficient data management, optimized sales strategy, and refinement of the sales process.

Recent research conducted with CRM users identified integration into their daily routines as the major challenges for users. Based on user feedback, two primary ways to increase integration are to decrease manual input

requirements (like TopOPPS' Rep Assistant features) and to increase the availability of mobile options (like TopOPPS' mobile app).



Regression Analysis

Regression and correlation analysis were performed on sales and opportunity metrics from before and after implementing TopOPPS. The objective was to determine the impact and significance of key sales metrics. Regression analysis observes interdependencies between key metrics and independent variables across time. The intent was to find metrics that have the highest impact on overall sales. An alpha of 0.05 was used to determine statistical significance. Most noteworthy, the research was able to quantify increases to new opportunities and close-won opportunities with statistical certainty.

CElect's Key Findings from Regression Analysis

The Washington University research revealed these three key findings: #1 AI leads to noticeable efficiencies and higher win rates, #2 using TopOPPS leads to bigger opportunities and #3 time kills deals.

#1 AI leads to noticeable efficiencies and higher win rates.

The sales organizations studied could handle more opportunities and had higher conversion rates than before implementing TopOPPS.

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TopOPPS Enables Sales Organizations to Handle and Close More Opportunities

Small/Medium(SMB)		Large(Enterprise)	
	Annual Gain		Annual Gain
New Opportunities	64 (21%)	New Opportunities	126 (18%)
Close Won	21 (14%)	Close Won	30 (15%)

For new opportunities, small to medium size companies could handle 64 more opportunities (21% compound annual growth rate). Similarly, the number of new opportunities successfully closed increased to 21(14%). In addition, there was an upward trend on Comprehensive Win Rate.

A key takeaway is TopOPPS customers are able to handle more opportunities year over year and ultimately close more of them. Win rates trended upward as well. As a result of efficiencies offered by TopOPPS sales organizations were able to do more with less.

#2 Using TopOPPS leads to bigger opportunities and bookings

The research analyzed customer experience and found exponential growth across the board for TopOPPS customers.

TopOPPS leads to Bigger Deals and Bookings

Small/Medium(SMB)		Large(Enterprise)	
	Annual Gain		Annual Gain
Bookings	\$700k (86%)	Bookings	\$18.7M (51%)
Average Opportunity Size	\$12k (50%)	Average Opportunity Size	\$155k (26%)

Analysis of small, medium and large companies initially failed to reach statistical significance with linear equations. This was due to the exponential growth of both variables. Applying an exponential model achieved statistical significance.

Large companies were able to increase their bookings by \$18 million annually, representing 51% growth. This value grew every subsequent year. Small companies observed more modest but still impressive growth considering their sales organizations only have a handful of representatives.

Not only are TopOPPS customers capable of closing more deals but the average deal size consistently grew year over year. This has a double multiplier effect on bookings which is evident by exponential growth across the board.

Seventy-five percent of the companies demonstrated an immediate increase in their bookings in the following month/quarter of implementation.

#3 Time kills deals

Every day added to the sales cycle decreased booking amounts. Faster sales cycle impact both bookings size and allow the sales rep to handle more opportunities.

TopOPPS Helps Close Opportunities Quicker

Small Companies		Midsize Companies		Large (Enterprise)	
	Impact on Bookings		Impact on Bookings		Impact on Bookings
Sales Cycle (Won)	-\$20k/day	Sales Cycle (Won)	-\$40k/day	Sales Cycle (Won)	-\$94k/day
New Opportunities	\$3.3k	New Opportunities	\$14k	New Opportunities	\$43k
Close Won	\$5.7k	Close Won	\$42k	Close Won	\$75k

Interestingly, the relationship between cycle times and bookings are inversely proportional. For large companies, decreasing “time to win” by 1 day can increase bookings by \$94K. There are significant financial advantages if the sales organizations can speed up the sales process.

Case Study Analysis

In addition to regression analysis, qualitative analysis of client data was examined using a case study lens. Case study analysis examined client data and processes before and after implementing TopOPPS to understand areas and processes impacted. The case study approach confirmed the results from regression analysis. Through examining specific companies, the research found significant examples of:

- Customers increasing the volume of sales (demonstrated by more opportunities closing),
- Bigger values retained (demonstrated by an increased booking and an increase in average opportunity size)
- Faster deal resolution (demonstrated by decreased Average Time to Close)

The processes contributing to these examples include the following use cases:

Sales data input automation

TopOPPS Customer Impact – Research Summary

TopOPPS AI synchronizes and automates data collection from multiple data sources including email and calendar. It connects the dots between these interactions and their CRM accounts and contacts. This increases sales effectiveness by:

- Freeing up sales rep time to increase selling time with the prospect
- Increasing information available in CRM
- Making more data available to AI for analyzing opportunity health, next steps, and appropriateness of the current stage

Customer sales contact analytics

TopOPPS analyzes customer interactions, including check-ins, emails, and meeting results to understand which behaviors and actions drive sales. These insights increased sales productivity and identify sales processes which drive alerting and guides winning sales behaviors.

Relationship intelligence

AI scores the health of the opportunity and the sales reps' relationship via prospect/sales rep interactions. It identifies the need for additional buying team roles that may be relevant to close the deal. TopOPPS AI imbeds ZoomInfo to help identify who to add to the buying team. This allows buying team identification early in the sales process so not to delay the sales process.

Customer lifetime value analysis

TopOPPS AI analyzes customer activity and attentiveness to assess the likelihood of customer

About TopOPPS

TopOPPS is a sales pipeline management and forecast predictability solution that uses machine learning algorithms to automate the collection of CRM data, bring clarity to the sales pipeline, alignment to the sales process and accuracy to the forecast.

The TopOPPS Platform:

- Improves CRM data capture and provides automated updates and sentiment analysis based on machine-learning
- Provides amplified sales pipeline visibility that focuses sales teams on the opportunities with the highest likelihood to close and enforces sales process consistency
- Improves forecast accuracy up to 180 days out using AI driven insights based on data from past performance

renewal or churn. The technology provides customer health scores to the sales team to provide guidance in critical customer situations.

Opportunity scoring

AI provides users with opportunity insights such as a prediction for moving the opportunity to the next stage and overall health score. The health score compares the opportunity with other opportunities and focuses sales on the opportunities most likely to close. It takes into consideration the impact of time, longer sales cycles and lack of customer interaction over time.

Guided selling

Prescriptive analytics surface recommendations via alerts to sales reps. Examples include next-best action, moving the opportunity to the next stage or recommending a sequence for the opportunity.

Sales coaching

AI provides recommended coaching activities, plus insights and recommendations based on the sales stage. It considers things like the opportunity score, buyer/seller interactions, historic patterns of both closed won and closed lost opportunities.

Forecasting sales

AI creates automatic and accurate sales forecasts based on previously closed deals and engagement in other close-lost opportunities



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