



WHITE PAPER

Pipeliner Voyager AI “Gen II”

↳ Journey to the next frontier of Sales CRM



Pipelinersales, Inc.

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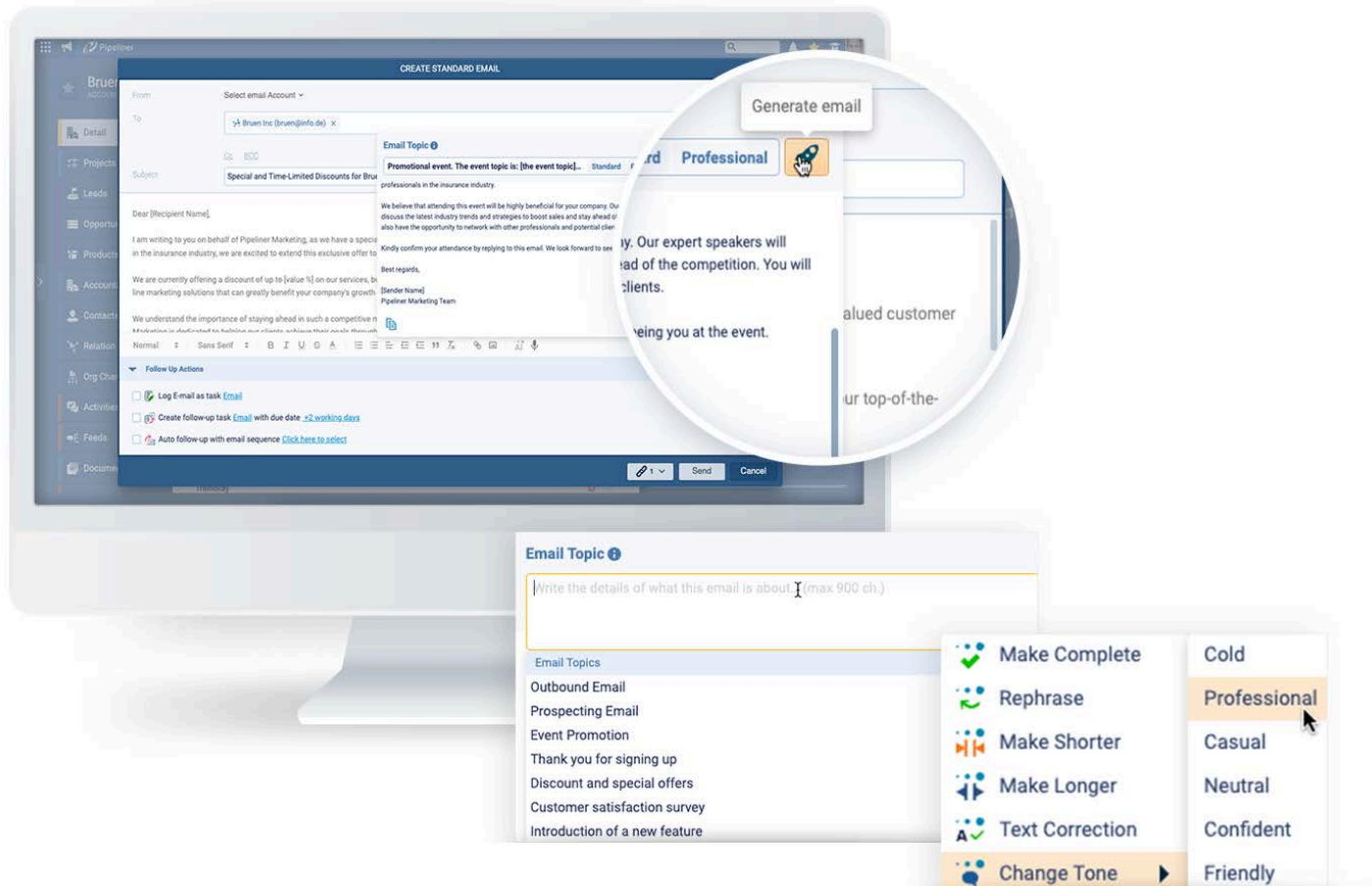
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“AI” > It’s All About the Data

Artificial Intelligence is only as good as the data it relies upon, therefore, the old adage of “**garbage in, garbage out**” is absolutely fundamental to its effectiveness. Without accurate data, algorithms cannot produce accurate output. Given that AI requires a lot of data, the issue of data management is even more acute. Furthermore, to effectively use the power of AI with internal, limited, or private datasets requires the highest levels of data accuracy and integrity within those datasets.

Pipeliner CRM: Pioneering AI in Sales CRM

Pipeliner CRM has been at the forefront of integrating artificial intelligence (AI) into customer relationship management (CRM) technology. While others were



still exploring AI's potential, Pipeliner was already transforming how sales teams operate.

Automating Repetitive Tasks: The Foundation for Intelligent Solutions

At Pipeliner, we recognized the need to address the challenges posed by repetitive, manual work. This realization led to the development of our pioneering solution, the **Automatizer** – the first true automation platform for repetitive tasks. This groundbreaking innovation served as the starting point for all future advancements in artificial intelligence technology that we knew were essential to implement.

As we have grown wiser in our approach to technology, we have come to understand its role in alleviating the burdens of repetitive work. Rather than replacing people, automation should free them to focus on their true purpose and build meaningful relationships. Humans were not designed to perform the same tasks repeatedly, as this can often lead to feelings of depression, anger, or dissatisfaction.

In today's world, technology has the capability to take over both simple and complex repetitive tasks, often performing them with greater efficiency and accuracy than humans. Machines are not subject to the limitations of the human condition – they do not make mistakes, fall ill, or require time off. The potential applications of the Automatizer are truly boundless, empowering organizations to streamline their operations and unlock new levels of productivity.

By embracing the power of automation, we are ushering in a new era where technology serves as a strategic enabler, freeing people to pursue their true passions and contribute to their organizations in more meaningful ways. «

Groundbreaking AI for Sales CRM

Voyager AI “Gen I”

In **2018**, Pipeliner introduced **Voyager AI “Gen I”**, a groundbreaking feature that uses intelligent algorithms to analyze customer data and provide sales teams with valuable insights, actionable recommendations, and early warnings about sales opportunities.

We called our AI solution **Voyager** because just as its namesake space probe travels through space, gathering information and feeding it back to NASA scientists to interpret and utilize, Voyager AI is constantly feeding back actionable intelligence to Pipeliner users to support them in achieving their goals.



First to Market with AI for Mobile CRM

The innovation continued in **2019** with the launch of the first-ever **AI functionality for Mobile CRM**. This feature brought smart updates, guidance, and suggestions directly to sales professionals on the go.

Voyager AI's capabilities are showcased through Pipeliner's signature visualization techniques, such as color-coded icons and charts, making data accessible and actionable. The "**Hot Now!**" feature highlights critical sales opportunities, optimizing efforts and boosting productivity.

The AI also powers performance comparison tools within the mobile CRM, allowing sales professionals to measure productivity, deal velocity, win rates, and efficiency in real-time. This fosters a competitive yet collaborative environment.

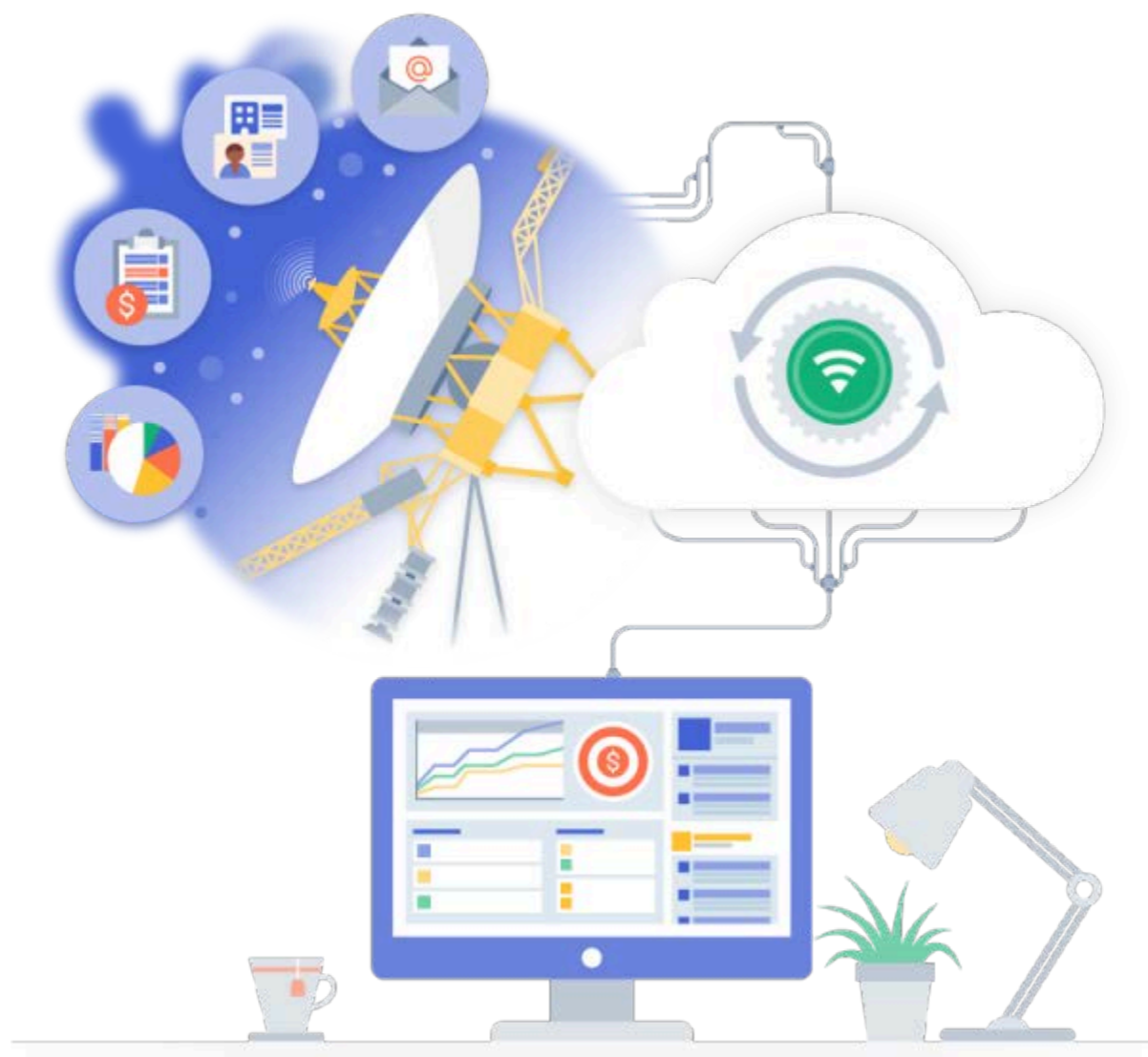


Advanced AI Assistant

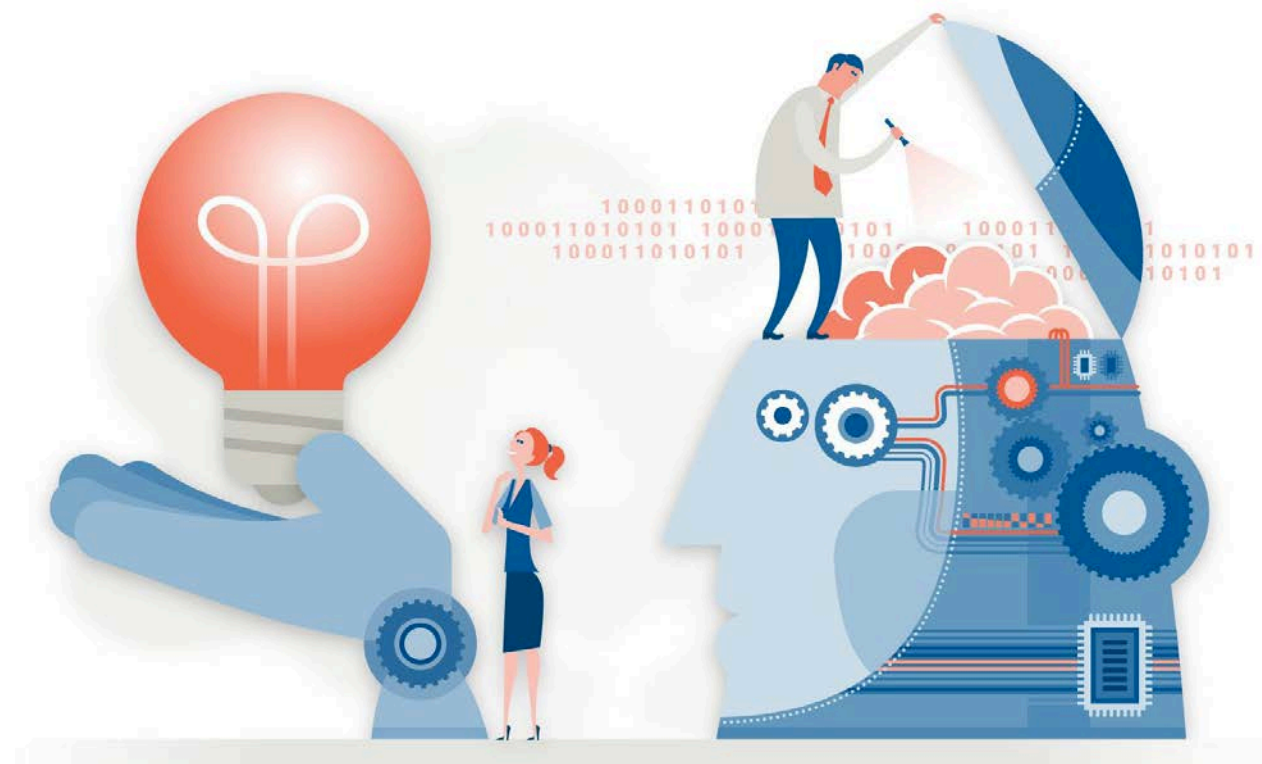
In May of **2023**, Pipeliner introduced the **Voyager AI Assistant**, a sophisticated tool embedded within the CRM platform. Built on advanced OpenAI models, this

assistant revolutionizes email composition for standard, mass, sequenced, and automated communications. It enhances the quality and targeting of messages without leaving the CRM environment.

Pipeliner recognized that crafting emails might not be the best use of a salesperson's time. By integrating the AI Assistant directly into its platform, Pipeliner allows seamless access to cutting-edge, generative AI technology. The assistant adjusts tone, composes error-free emails, customizes message length, supports multiple languages, and includes talk-to-text functionality.



We also added a very important AI feature for every meeting a salesperson has. Most Salespeople don't like to enter notes after a meeting, which results in less visibility and transparency into the account or opportunity. We knew that if we could fix this issue, the sales team would immediately adopt the solution. Rather than type notes, after the meeting, the salesperson can simply speak into their phone or computer using voice-to-text and dictate the meeting notes. Next AI automatically corrects the text and can create bullet points and action items. This is an extremely helpful and effective solution so that no meeting is ever without notes and follow-ups.



While others were still considering AI integration, Pipeliner had already embedded intelligent features that empowered sales teams, improved decision-making, and drove success. This proactive approach has revolutionized sales team operations and redefined the standards for modern, AI-enhanced CRM systems. Pipeliner CRM continues to lead the way, proving that the future of sales is here, and much of it will be powered by AI.

Data Accuracy & AI

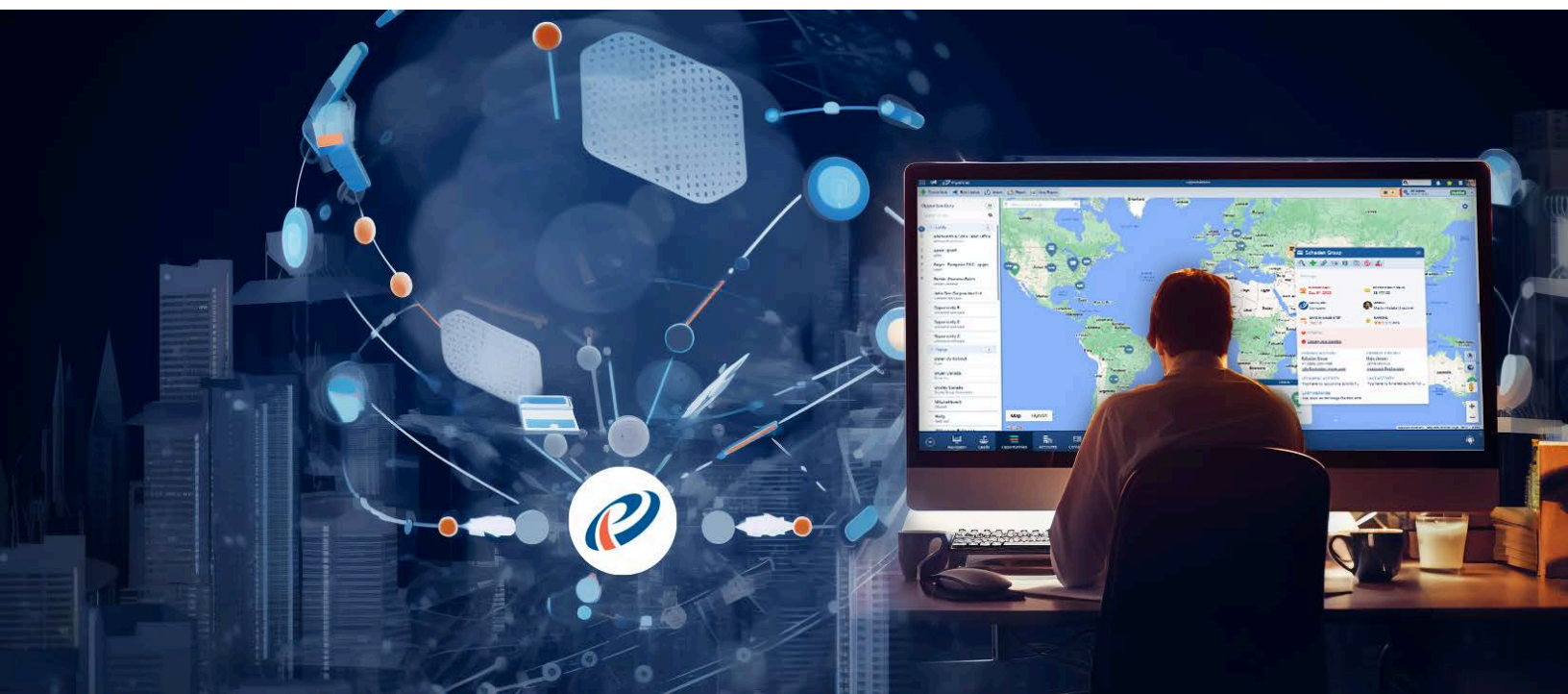
In May **2024**, Pipeliner CRM released a critical new feature, the **Duplicate Checker**, that *(like the Automatizer)* lays the foundation for future AI-related innovation. Clean and high-quality data is fundamental to creating accurate and reliable AI models. Datasets that contain duplicates and errors can degrade model quality and lead to incorrect conclusions about model performance. Legacy CRM has always had a problem with data accuracy resulting in frequent expensive *(and often manual)* data cleansing initiatives that only provide short-term band-aids. Pipeliner CRM, in contrast, with the **Duplicate Checker**, puts data accuracy front and center and in the hands of the user. Clean data brings alive the rich features of Pipeliner CRM and allows for the delivery of new and innovative AI capabilities. We have made the system so intelligent that each company can define their own parameters for finding duplicates and we give them the ability to update their own data and clean their own database. «

Announcing > Pipeliner Voyager AI “Gen II”

In **2024** Pipeliner CRM is launching the second generation of Pipeliner Voyager AI. This includes all of the current AI and AI-enhanced capabilities within Pipeliner CRM, and new and innovative AI features that Pipeliner will add to the platform over time. Like NASA’s Voyager II space probe which has more sophisticated capabilities and can go deeper and further than Voyager I, **Pipeliner’s Voyager AI “Gen II”** will take AI for Sales CRM to a whole new level.

It’s still all about Sales

As with all things Pipeliner CRM, **Voyager AI “Gen II”** will focus on AI tools and capabilities that directly impact and support Sales. Before bringing anything to market, Pipeliner carefully assesses how any new capability will improve or enhance the daily work practice of salespeople, sales leaders, and management. With a mission to deliver the best Sales CRM available, Pipeliner ignores the hype,



focusing instead on the applicability, utility, and direct impact of any feature or capability included in the platform.

What is coming to Pipeliner Voyager AI “Gen II” in 2024 & beyond?

(The following future-looking statements are for informational purposes only and subject to change given the dynamic nature of any product roadmap.)

Voyager Summary

Building on the AI Assistant released in 2023, Pipeliner will add a **Summary** feature that reviews and summarizes the interactions with a particular customer or prospect.

At a glance, salespeople, managers, support, customer success, (and any other relevant parties) can review a summary of all these different interactions and immediately be up-to-speed on the history and ready to take the appropriate action.

This will ensure that everyone is on the same page in the most immediate and efficient way possible.

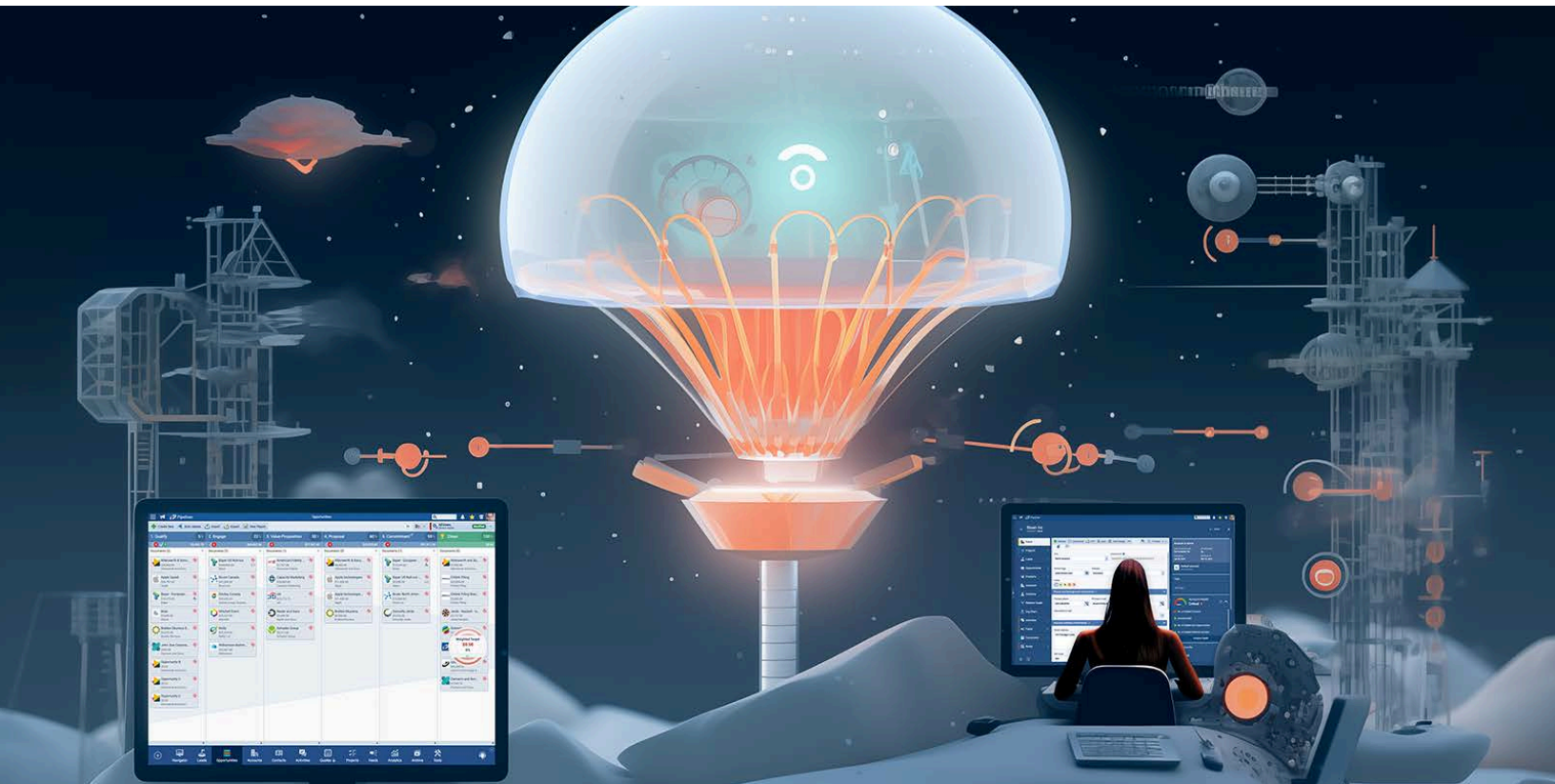
Voyager Sentiment

Keeping a finger on the pulse of customers is critical for account retention and expansion and in addition to the existing Account Health Checker, Pipeliner CRM will introduce **Sentiment Checker**. This Voyager AI tool will use artificial intelligence to analyze and interpret the emotions or sentiments expressed in customer interactions and communications. By understanding the sentiment behind customer interactions, Pipeliner CRM users can gain deeper insights into

customer satisfaction and account health, which can inform customer service strategies and sales approaches.

Voyager Recommend

To grow and expand existing accounts it is essential that salespeople can quickly identify product/service upsell and cross-sell opportunities. Pipeliner CRM already includes a Whitespace View that tracks cross-sell and upsell



Opportunities by comparing your selected Account to similar accounts. Voyager AI **Recommend** will increase this capability by using AI to collect and integrate customer data from various sources within the CRM system, such as purchase history, customer interactions, support tickets, and behavioral data. Voyager AI will use this data to identify and highlight timely and relevant product/service upsell and cross-sell recommendations.

Voyager Score

Knowing which leads to focus on is critical for salespeople who cannot afford to waste time on the wrong opportunities. To address this issue, Voyager AI **Score** will analyze large volumes of data on lead behavior, engagement, and demographics to prioritize leads that are most likely to result in sales. The leads scores will update dynamically whenever new or relevant data is added so that the sales team always knows where to focus.

Voyager Key Account Assistant

As everyone knows, retaining and growing customers is critical to business success and we also know that it is far harder to sell to a new prospect than it is to upsell or cross-sell to existing customers. This is why Pipeliner is the only CRM vendor to include the **Key Account Management** module as part of the core system.

The new Voyager Key Account Assistant will augment the existing features by intelligently monitoring each individual account. Using AI it will track news, announcements, departures, social media, and other sources of information pertaining to a particular company.

It will review, summarize, and deliver insights directly to the salesperson. In this way, a salesperson can always know what is happening on a broad level with their customers and immediately see where opportunities are for increased relationship building and revenue growth.

Navigator version II

In 2016 Pipeliner introduced the unrivaled Navigator feature, a daily dashboard that alerts users to what needs immediate attention, organizing their day, and keeping their eyes firmly on their targets and progress. While there have been many enhancements and improvements to Navigator in the years since its release, we will be releasing a new version II of this capability complete with new AI features.

Using AI Navigator version II will be an intelligent dashboard that is focused on whatever targets and goals the particular profile of the user has.

At a high level it could be the Chief Revenue Officer who at a glance can see, for example, how revenue is tracking against the budgeted revenue target combined with an intelligent gap analysis showing that new leads are tracking behind what is required to meet the goal so the CRO can immediately take action - the gap analysis could contain whatever key metrics, especially leading indicators, individual organizations want to track.

At the salesperson level, **Navigator II** will deliver intelligent insights and gap analysis of their personal targets. For example, Navigator in combination with the Key Account Assistant could alert the salesperson that one of their Key Accounts has just acquired another business which could mean an opportunity to increase revenue with the expanded business. Other features will include proactive “suggested actions”, “summaries by time period” and other intelligent insights to help users navigate their day.

Overall, **Navigator II** will be an intelligent, dynamic dashboard that not only keeps the user focused on their targets and the progress they are making against them and provides them with a snapshot of their daily activities but with new AI capabilities it will proactively suggest actions to take, opportunities to focus on and alert to changes in account circumstances.



Where is Pipeliner Voyager AI “Gen II” headed?

Being innovative and pioneering is embedded deep in the DNA of Pipeliner as demonstrated by the different ways Pipeliner has revolutionized the CRM industry and changed the perception of what users demand of a modern system. This is underlined by the fact that Pipeliner CRM is built on the latest technologies and is constantly future-proofing the system. Pipeliner will, therefore, continue to be at the vanguard of AI innovation for Sales CRM.

Central to Pipeliner’s strategy is making it as easy and intuitive as possible for users to harness the power of our Sales CRM. New developments in AI have the potential to achieve this in ways previously unimaginable.

Natural Language Processing (NLP), for example, which is used to understand and process human language, could enable users to interact with the system using conversational language. This will reduce the already short learning curve

required for Pipeliner even further making the CRM more accessible and easier to use for all levels of users. Furthermore, Natural Language Queries could also be input using voice as well as text. At Pipeliner we can see a future where sales professionals interact with the CRM using natural language voice commands.



Picture a sales leader using voice command Natural Language Queries (NLQ) to generate real-time reports and being able to manipulate, slice, and dice using additional voice commands.

Another area NLP could impact that Pipeliner is currently investigating are new ways of automating the process of entering data into the CRM by extracting relevant information from emails, chat messages, or documents. This would not only save time but also reduce the likelihood of human error.

Machine Learning

As AI and machine learning evolve and improve, it opens the possibilities for the system to identify routine processes and suggest automations and workflows to increase efficiency and further reduce the burden on users.

This would help organizations speed up their digital transformation initiatives and see immediate productivity gains.

Security

Underpinning anything Pipeliner does with AI is a laser focus on security. Protecting customer data sets will always be paramount and a core consideration for any feature development. The only features or capabilities that we include will be ones that **a)** directly benefit sales professionals using Pipeliner CRM and **b)** are fully secure and rigorously tested. «

Conclusion

As highlighted above, **fundamental to unlocking the power of AI for Sales CRM is both data accuracy and automation.** Without these many AI tools will be limited point solutions and most of the platforms that boast AI components will be extremely superficial in what they can deliver.

Pipeliner, with its first-to-market Automatizer workflow engine and now with its unique Duplicate Checker, is best positioned to continue to revolutionize Sales CRM with AI.

Pipeliner CRM is the only CRM that focuses exclusively on B2B consultative selling and the only platform available today that includes all of the capabilities needed to support and manage Sales. Whether it is **Lead Management, Contact Management, Pipeline Management, Sales Management, or Account Management**, Pipeliner provides the tools to manage them all. Additionally, Pipeliner introduced the industry's first true reporting business analytics tool

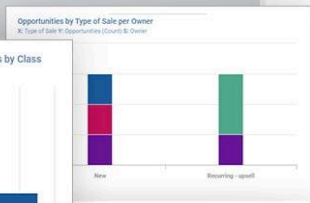
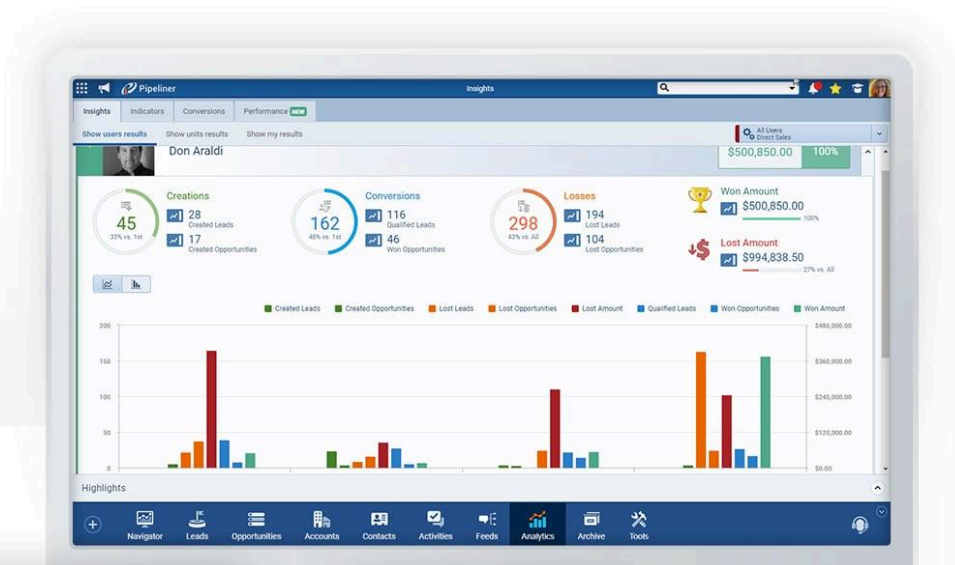


which unlocks the power of the data in the CRM with highly customizable, visualized reports that can also be automated.

Uniquely Pipeliner always looks to visualize data in the most engaging way possible and indeed goes above and beyond by providing multiple ways to view data depending on personal taste or type of activity. Our **Power Panel** allows users to immediately customize what they are viewing and deliver what we call **Instant, Dynamic Visualization**. We see using AI as a natural extension of our enduring commitment to supporting sales professionals and leadership with a Sales CRM that is intuitive and easy to use and yet extremely powerful in what it can deliver.

The AI components that we add to Pipeliner Voyager AI “Gen II” will focus on helping users continue to unlock the power of the system by decreasing the learning curve even further and making advanced features even more accessible.

In addition, Voyager AI “Gen II” will **support and drive digital transformation with leading-edge automation.** «



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