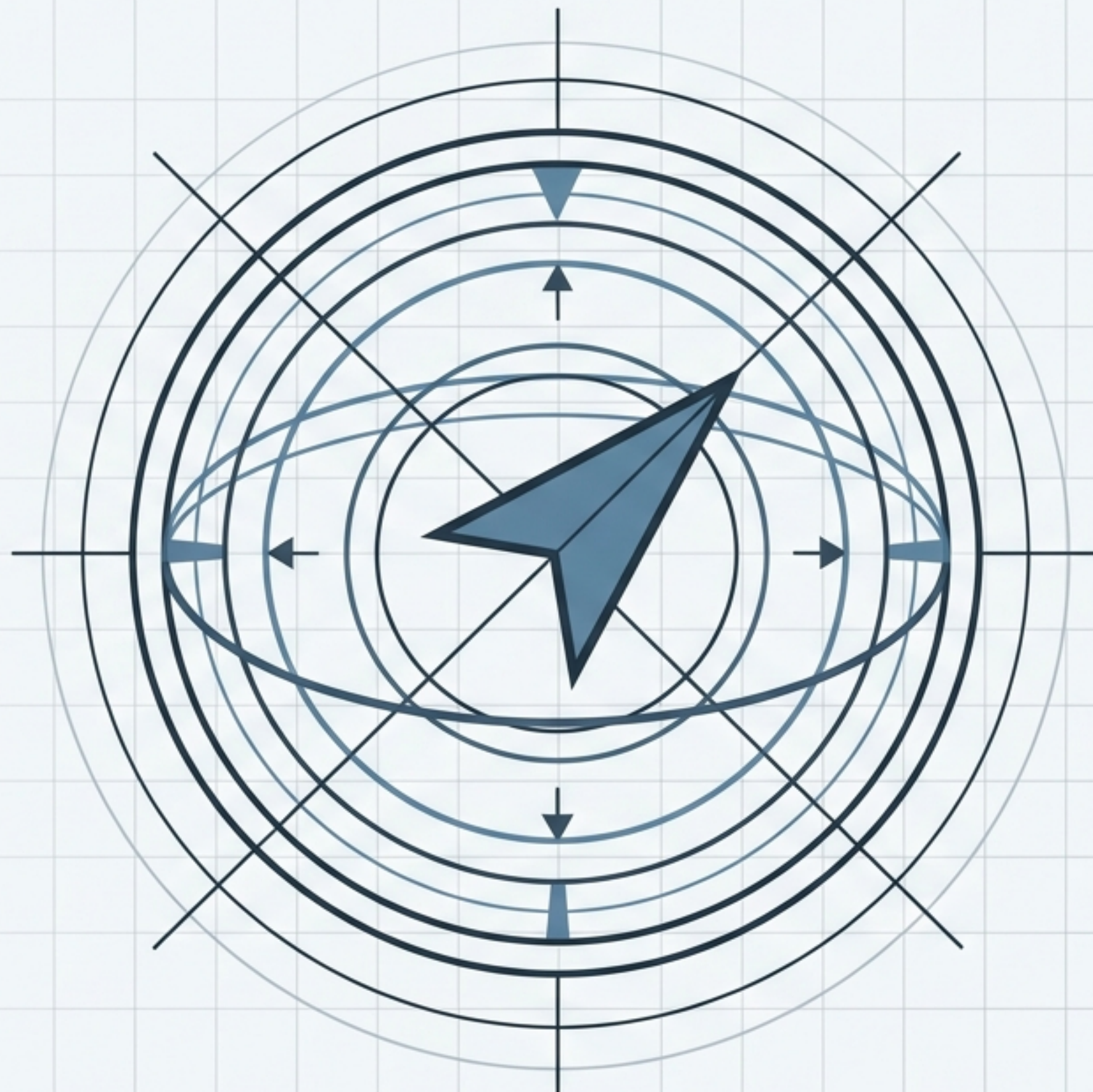


SYSTEM: NBA_ENGINE

The AI Co-Pilot for Modern Sales

Guiding Sales Rep Activity
Priorities via Next-Best-Action
Action Engines



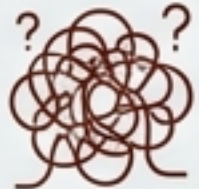
STATUS: ONLINE

Traditional CRM systems create a fog of data overload.

The Fog of Sales (Traditional CRM)



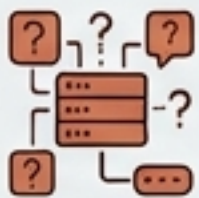
Analysis: Manual synthesis of disparate data points.



Timing: Reactive selling based on past events.



Engagement: Generic, one-size-fits-all outreach.



Insights: Static data leading to decision fatigue and human bias.



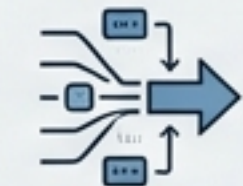
The Radar (Next-Best-Action Engine)



Analysis: Automated synthesis connecting invisible dots.



Timing: Proactive anticipation of future outcomes.

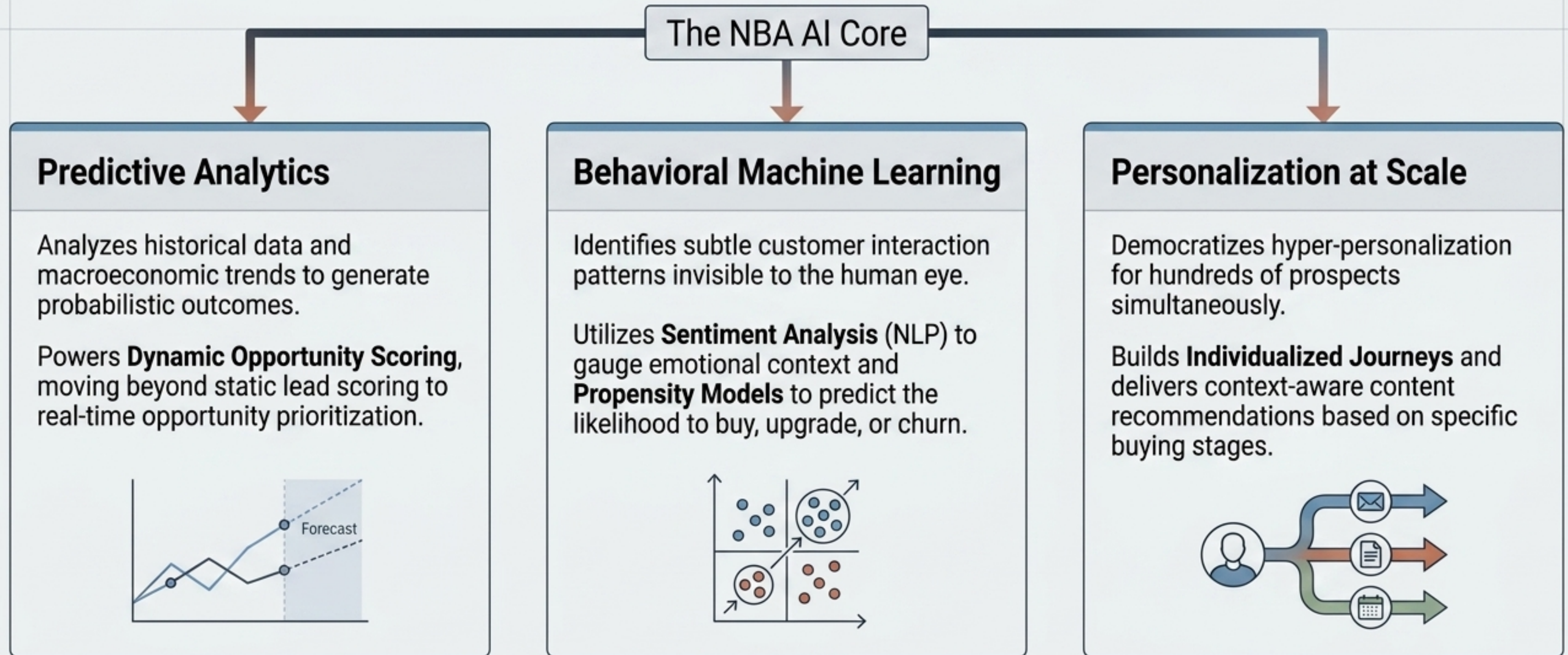


Engagement: Hyper-personalized, context-aware engagement.



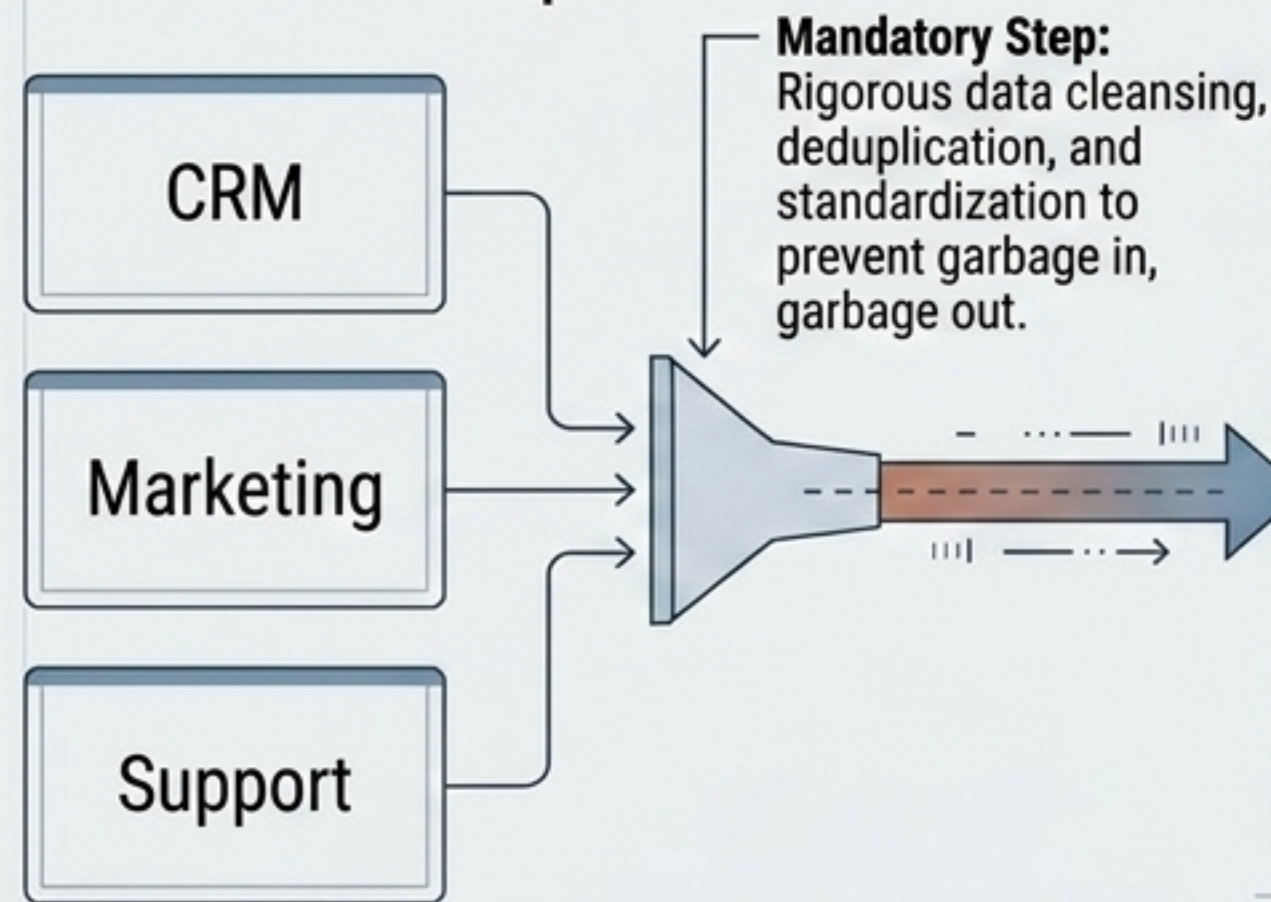
Insights: Dynamic adaptability updating in real-time.

Three distinct machine learning models power the intelligence of the engine.

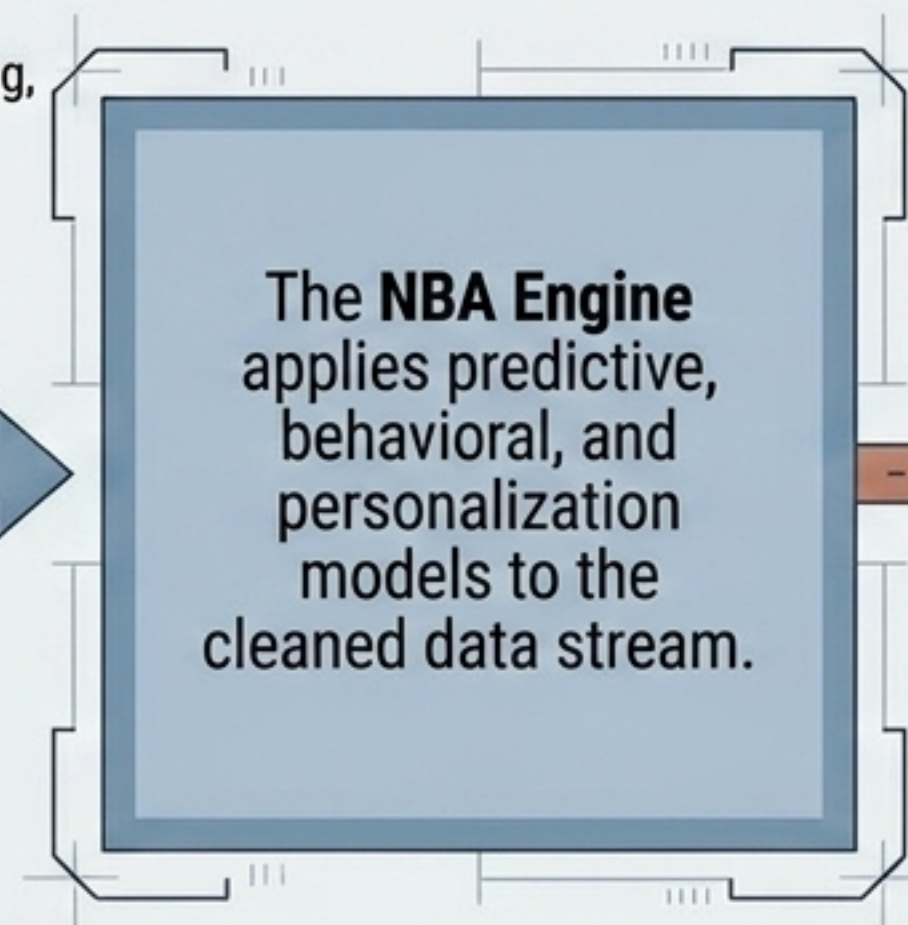


Rigorous data harmonization fuels the CRM nervous system.

Phase 1: Consolidated Input



Phase 2: The Processing Core

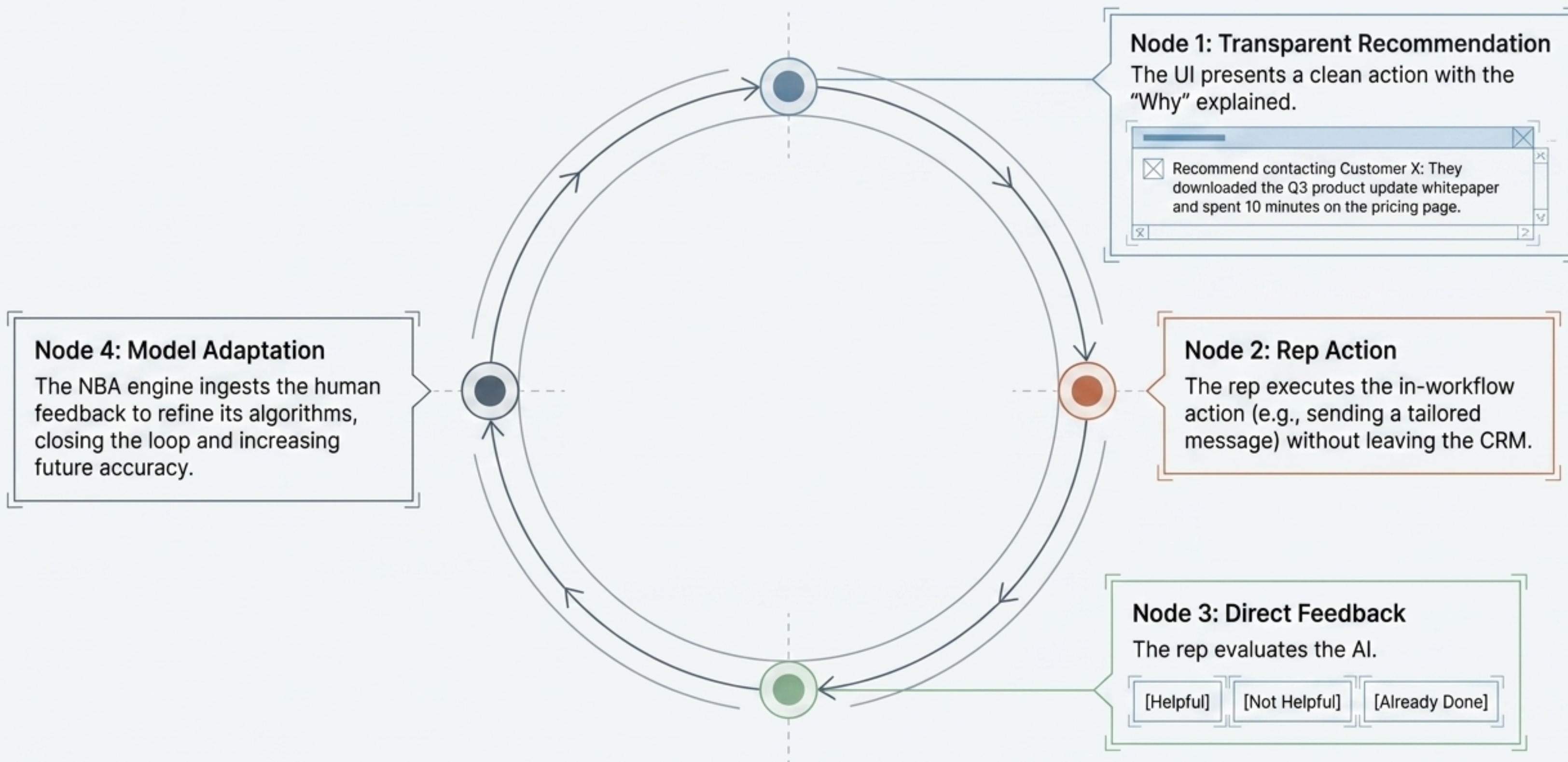


Phase 3: Seamless Integration



The CRM acts as the Central Nervous System, delivering In-Workflow Recommendations and Actionable Clicks to minimize context switching.

Explainable AI drives a continuous human-machine learning loop



Proactive engagement accelerates the entire sales cycle.

THE METRICS

50

Sales Reps
Empowered

3

Core AI Recommendation
Models

92%

Recommendation
Accuracy

15%

Conversion Rate
Improvement

QUALITATIVE IMPACT



Intelligent Lead Nurturing

Identifying exactly when a lead is sales-ready to prevent premature contact.



Faster Deal Progression

Identifying pipeline roadblocks and acceleration opportunities in real-time.



Reduced Admin Burden

Automating decision-making so reps focus purely on relationship building and active selling.

Proactive mitigation strategies ensure sustained engine performance.

Risk Profile	Status	Mitigation Protocol
Rep Trust & Adoption	● Monitor	Utilize Explainable AI to show the reasoning behind suggestions, paired with training that emphasizes AI as an augmentation tool, not a replacement.
Data Drift & Evolution	● Monitor	AI is not “set it and forget it.” Implement continuous performance monitoring and regular model retraining to adapt to shifting market conditions and customer behaviors.
Historical Bias	● Monitor	Conduct regular data audits and apply proactive bias mitigation techniques to ensure equitable recommendations across all customer segments.

The NBA framework scales to unify the entire revenue organization.

