



Journey Analytics

**Enabling B2B – Sales/Account Managers
to Outperform Competition**

Key Modules



Account/Customer 360

Account/Customer Level Engagement Score. Includes Customer Dossier and Summary Insights



Contact 360

Contact Level Engagement Score. Includes Contact Dossier and Summary Insights

Features



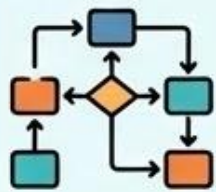
Import Data from popular CRMs or Custom Applications



Summary View of Engagement Across Contacts and Accounts



Review Timeline of Engagement by Stage



Review Engagement Across Business Functions or Journey Stages



Create **Action Plans** for Accounts



Unlimited Tags to Segment Contacts and Accounts



Prioritize Contacts and Accounts by Recency of Engagement



Search easily across all data



On This Day to view history of Engagement for a given Key Events

Contact Insights



The Challenge: Dispersed & Inaccessible Data



Contact data dispersed in multiple systems



Key Information about Contact not easily accessible



Inability to Prioritize Contact Engagement

The Solution: Unified View & Prioritized Engagement



Unified view of Contact Engagement with Contact Scoring



Contact Attributes enabled through Contact level Dossier with Relationship, Ease of Engagement and, Personality Attributes



Prioritize Contact Engagement through:

- Relationship Strength Score
- Ease of Engagement Score
- Opportunity Score
- Engagement Score

Contact Dossier

Contact Dossier

Contact Name
Pradeep Kumar

Step 1 Saved | **Step 2 Saved** | Step 3 Saved

Employee(s)

[+ ADD EMPL](#)

Employee Name

Dhanesh PK

Known since Year

2025

Note about this relationship

Connects me with other prospects

Relation (type)

Friend

- Colleague
- Ex-Colleague
- Customer
- Partner
- Classmate
- Friend
- Relation
- Vendor/Supplier
- Connection of Connection

Responds Well To

- Email
- Phone Calls
- SMS/WhatsApp
- LinkedIn Messages
- In Person Meeting Requests

Responds Well To

SMS/WhatsApp, Phone Calls

Describe Personality

Visionary Yes	Innovative Not Sure	Risk Taker No
Business Only No	Easy to Reach Yes	Open to Ideas Yes
Growth Mindset Not Sure	Timely Payments Not Sure	Quick to Respond Yes
Quick Decision Maker Not Sure	Engaging in Discussions Yes	Ready to be a Reference Yes

Values

Trust, Relationship, Transparency, Timely Response

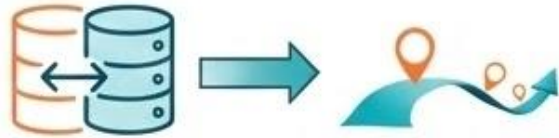
Upsell Likelihood

4


Upsell Timeline


Next Quarter

Relationship Strength



- Contact Interactions from CRM system(s) available in Journey Analytics Platform.
- Capture Relationship Strength with following attributes

-  Known Since Year

-  Type of Relationship

-  Type of Relationship



Capture more granular information for Contacts known through multiple people in the network.



Relationship Strength Score quantifies how long and well you know a contact.

Personal Attributes



Visionary:
Buys on Vision



Innovative:
Values Innovation



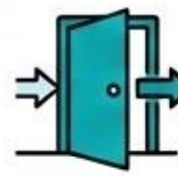
Risk Taker:
If no, Only Sell Stable Products



Business Only:
Avoid too much Small Talk



Easy to Reach:
If no, prepare well and try to reach a decision at the earliest



Open to Ideas:
If there are gaps in Product/Services for the current needs, propose different options

Capturing Personality attributes can help fine tune your engagement tactics

Beta Program Overview



Your Effort:



Enable Access to your CRM System or Export Sample Data [1 Week]



Attend Weekly Check-in to review data/value



Beta User Training



Our Effort:



Import data from your CRM System [1 Week]



Onboard Users



Quality Checks



Ready to Demo



Weekly Check-in to Capture Feedback

Beta Program Timeline: 3 months
Cost: FREE

