

How Clari Align Drives Winning Deal Inspections

Clari Align's mutual action plans keep your forecasts accurate and your meetings meaningful

Thousands of details are collected throughout the life of each deal. Each hour your reps engage with a prospect, those details emit signals on deal health, opportunity for expansion, or possible roadblocks ahead.

Keeping tabs on these details is critical to the success of your deals. But your one-on-ones shouldn't be dedicated to fact-finding interrogations, and your forecast shouldn't falter due to a lack of visibility.

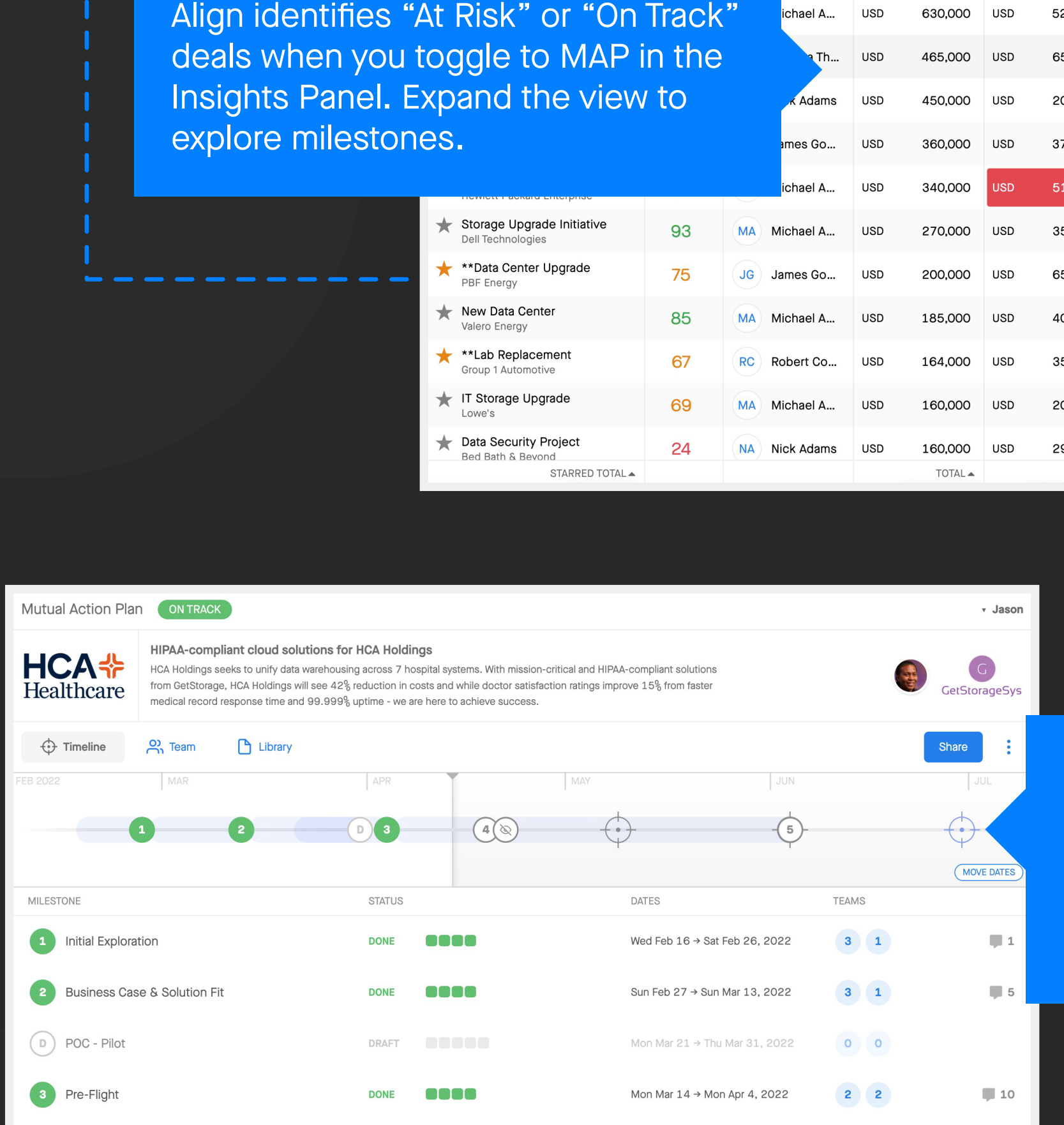
Clari Align's mutual action plans help you conduct deal inspections that leave no details behind. Quickly assess risk and roadblocks, buyer engagement, internal resources, and next steps.

Here's your step-by-step guide to performing precise deal inspections with Clari Align:

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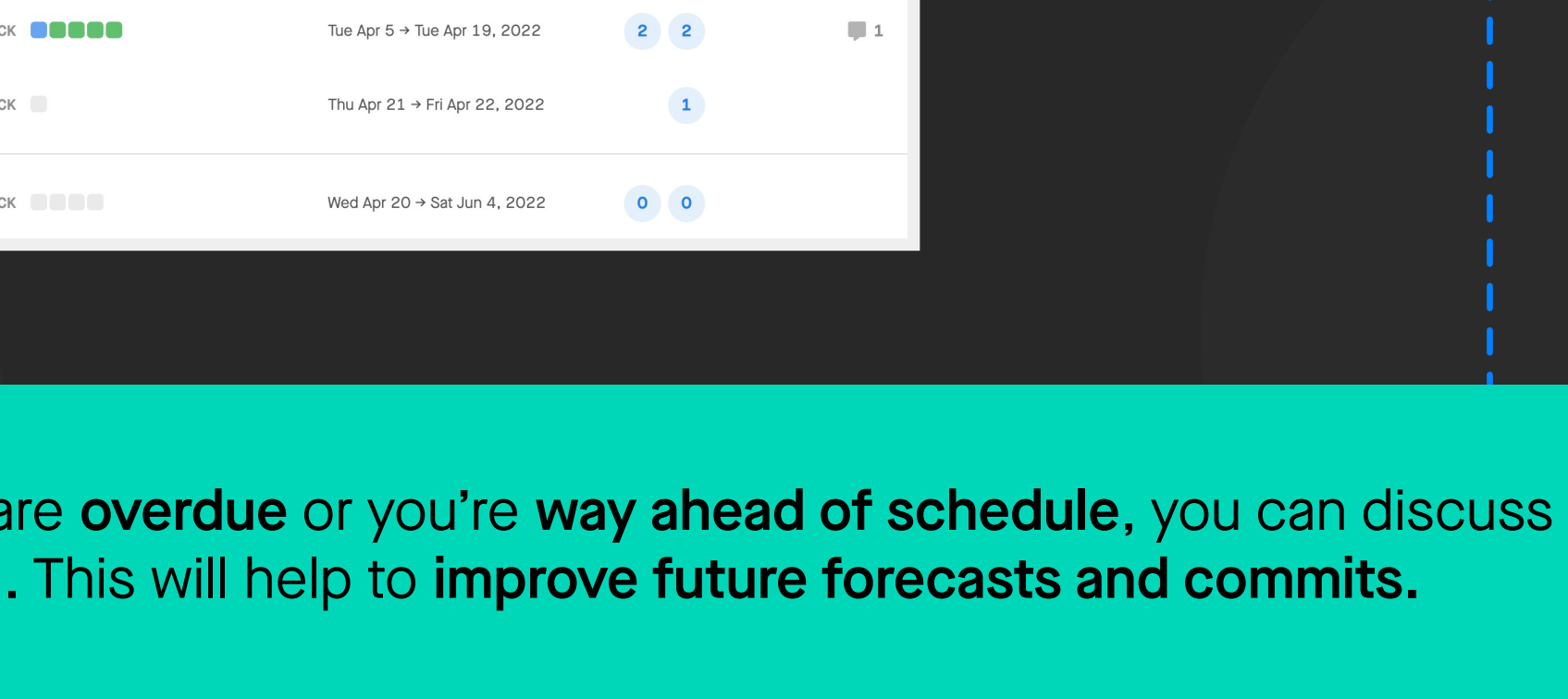
Identify the deals you want to focus on

With Clari, quickly see how deals are tracking, the gap to you, and the commits across your team. Move to Commit and Opportunities to capture a high-level list of risks and upsides in the insights panel. These insights provide more direction in your deal inspection.



At each opportunity, access important deal-specific details from the insights panel. Quickly get a sense of the health of the deal with deal activity and CRM score to see what did happen. With Clari Align, you can now also see what didn't happen.

Align identifies "At Risk" or "On Track" deals when you toggle to MAP in the Insights Panel. Expand the view to explore milestones.



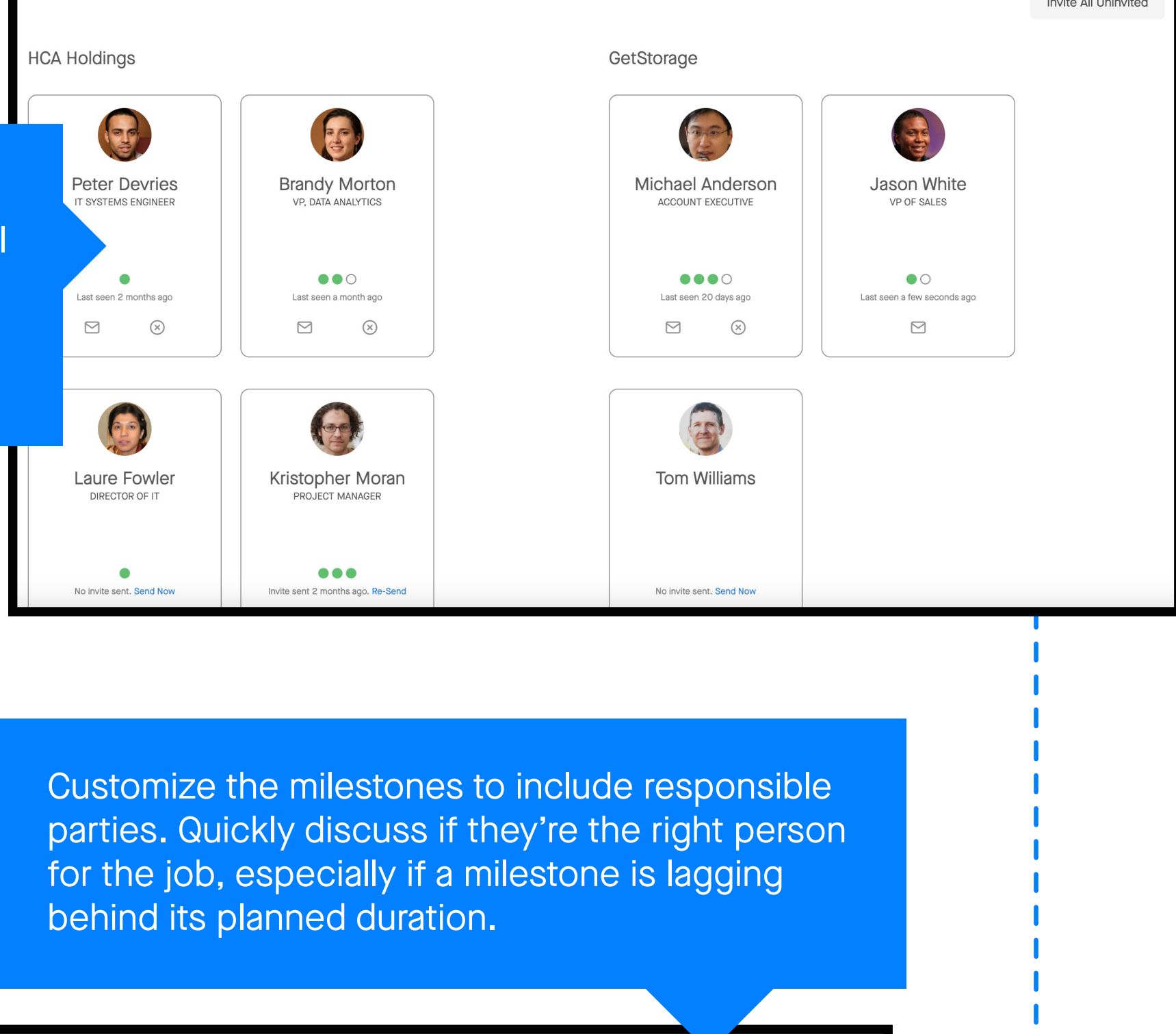
The visual timeline shows which milestone may be blocked or where you need to adjust to accommodate the buyer's process.

If several milestones are overdue or you're way ahead of schedule, you can discuss the quality of the deal. This will help to improve future forecasts and commits.

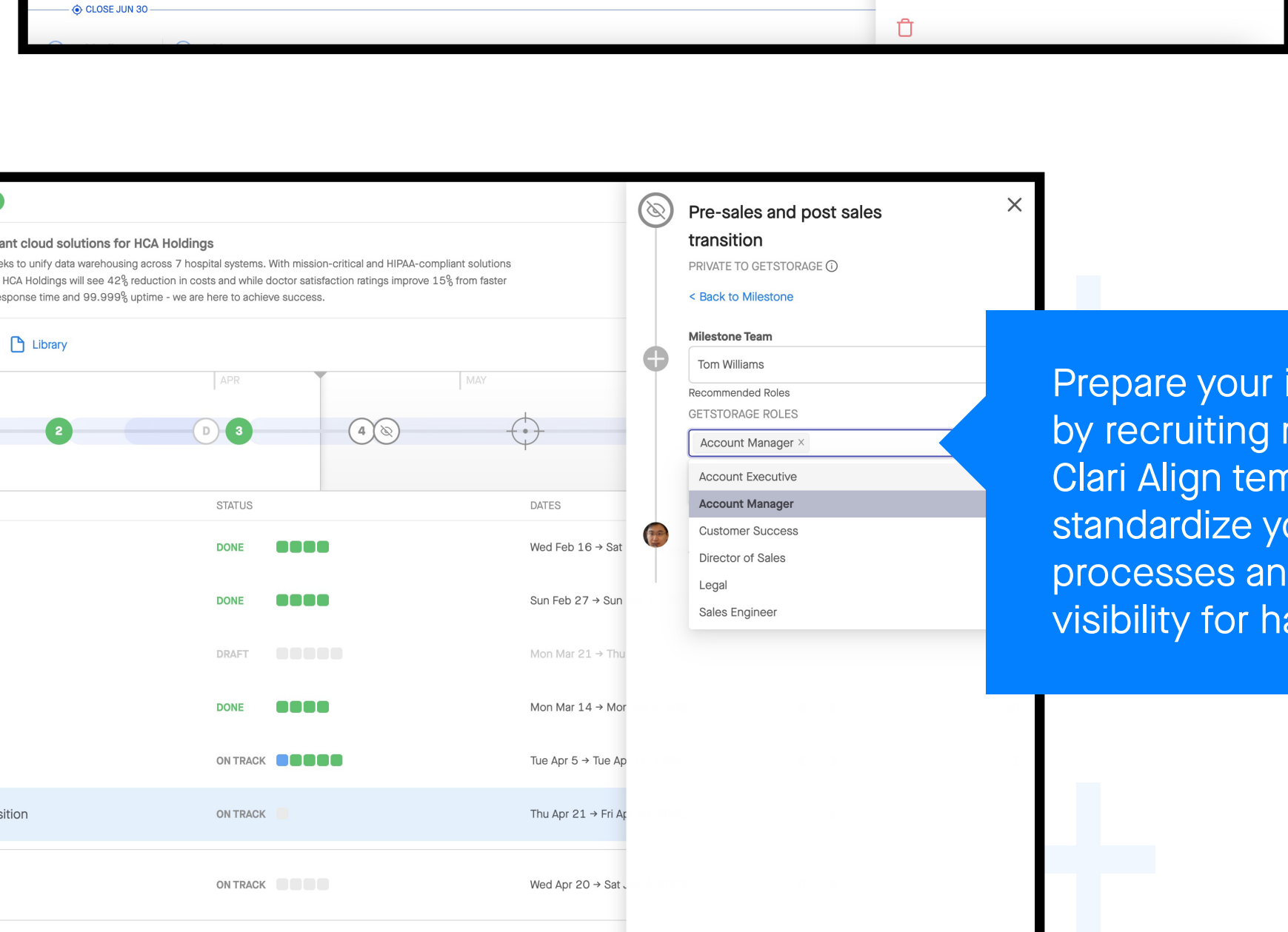
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Build the right relationships with the right people to win the deal

Quickly see who is invited into the deal and what role they will play. If you identify someone who is missing, send them an invitation to join.



Customize the milestones to include responsible parties. Quickly discuss if they're the right person for the job, especially if a milestone is lagging behind its planned duration.



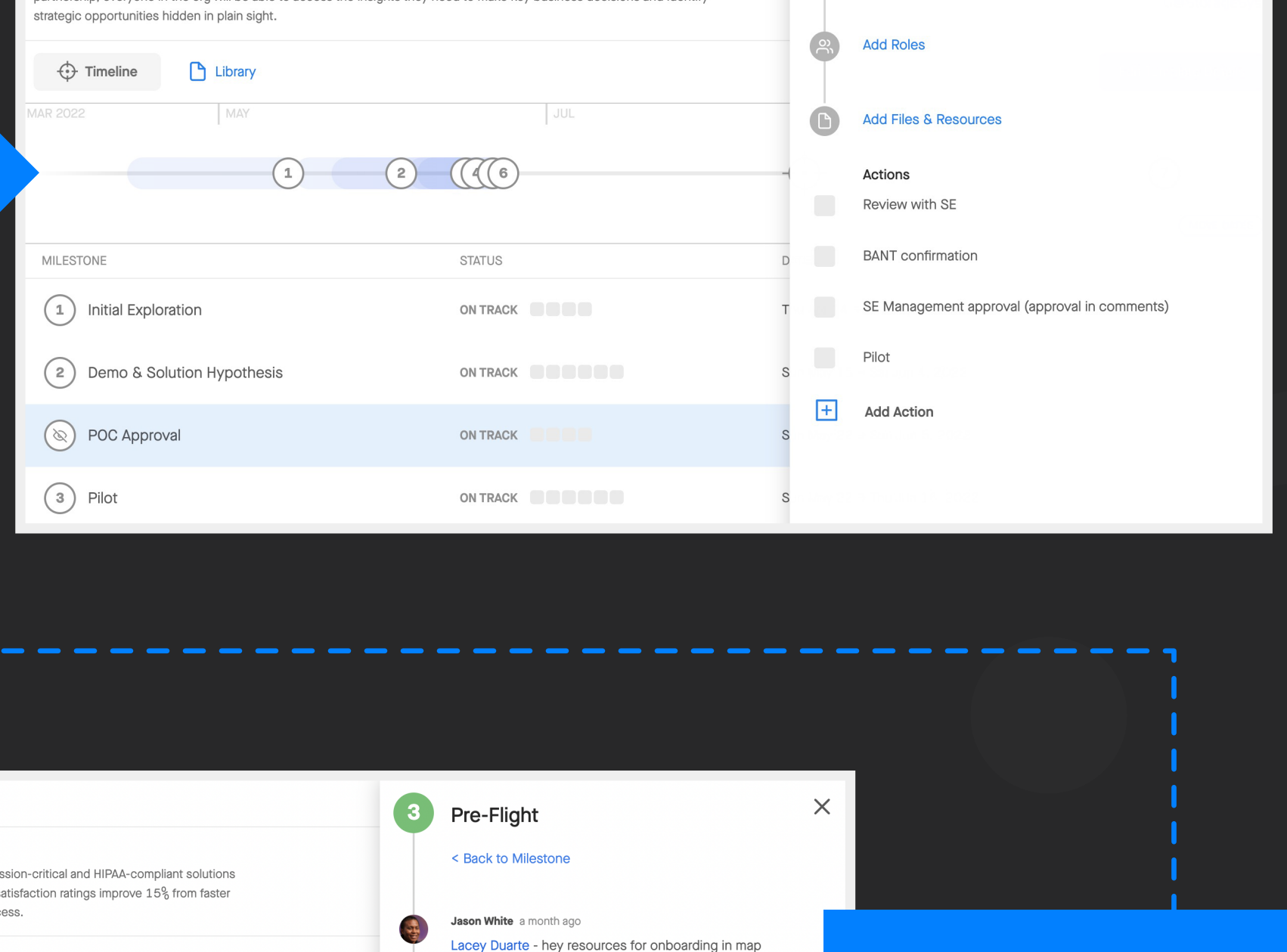
Prepare your internal teams by recruiting resources early. Clari Align templates can help standardize your internal processes and provide early visibility for handoffs.

The more complicated a deal is, the more people you should have collaborating on your MAP. But simple MAPs work just as well so long as they add value and close the deal faster.

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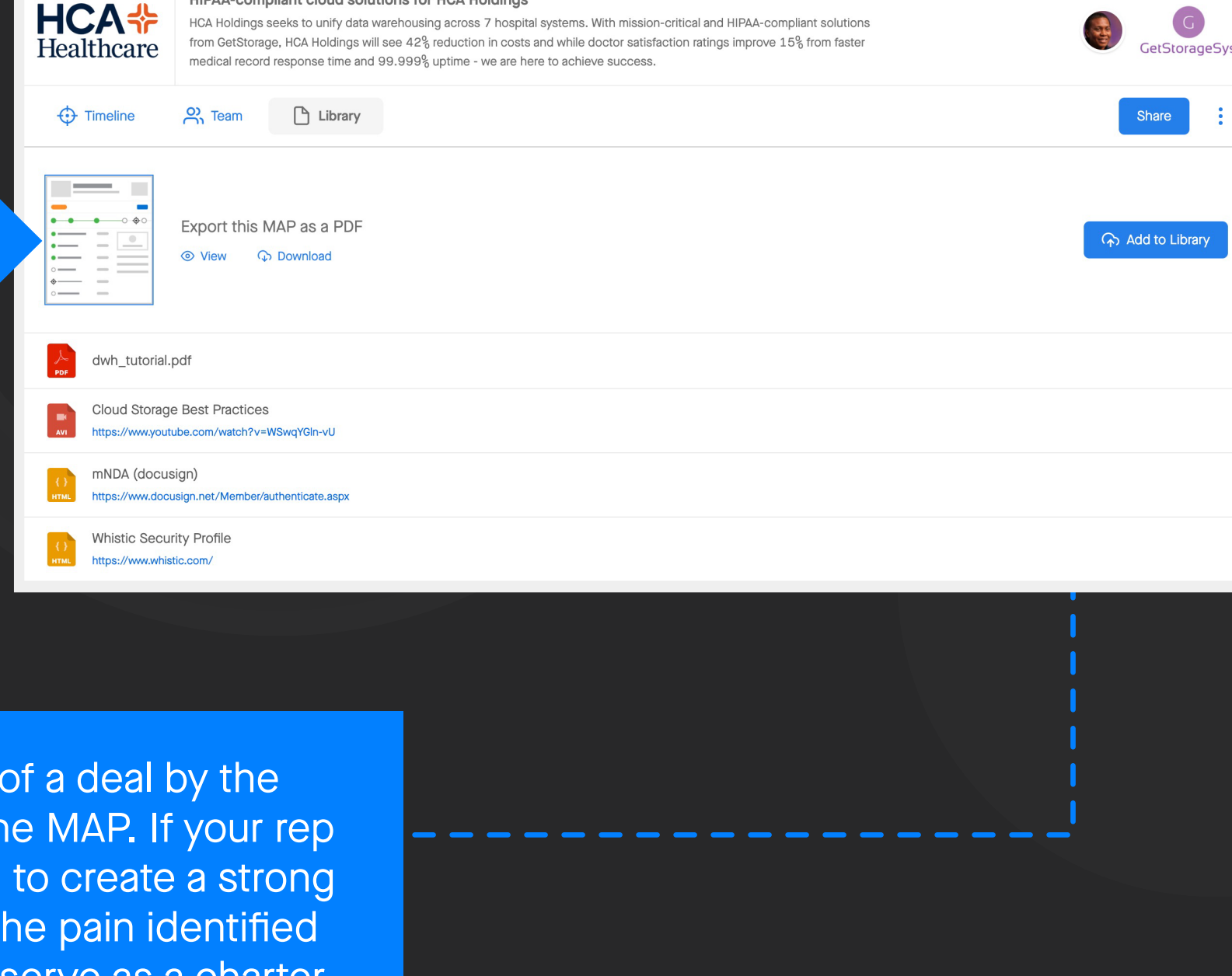
Encourage buyer engagement and promote winning activities

Ensure high intent and best fit for the buyer by including an intent check-in milestone so that both buyer and seller are on the same page, and that they're ready to move forward together. Introducing a Go / No Go milestone will help reserve expensive resources like POCs and pilots for the best fit deals.

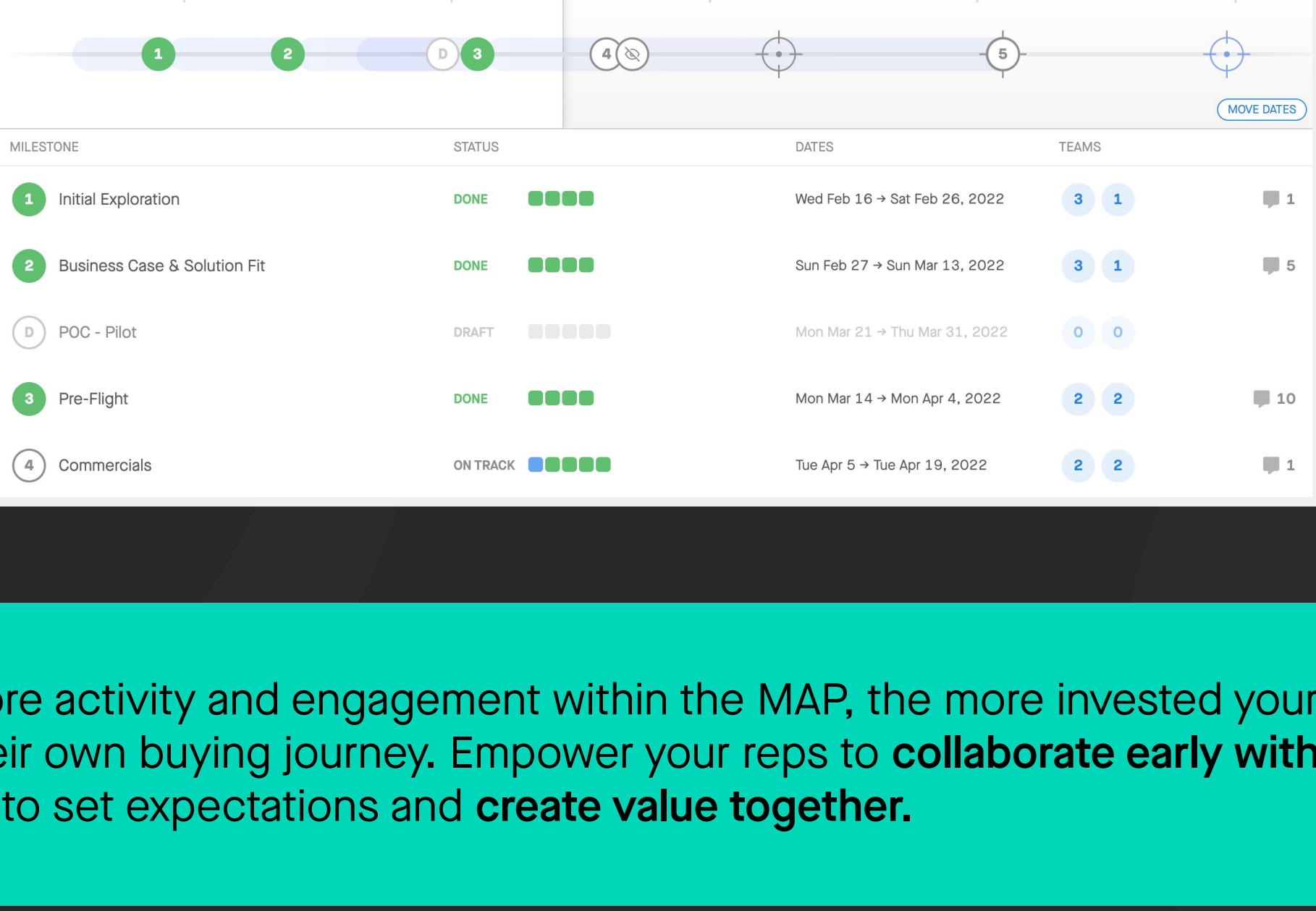


Access comments, questions, and files shared between the buyer and your rep. If there's a lot of activity, you know that the buyer is an active participant in the scope and journey of the deal.

Identify potential blockers before they delay the deal. Files can be uploaded to specific milestones within the MAP and added to the Library of shared resources. Unblock your rep by providing internal documentation or strategizing an avenue to request it from the buyer.



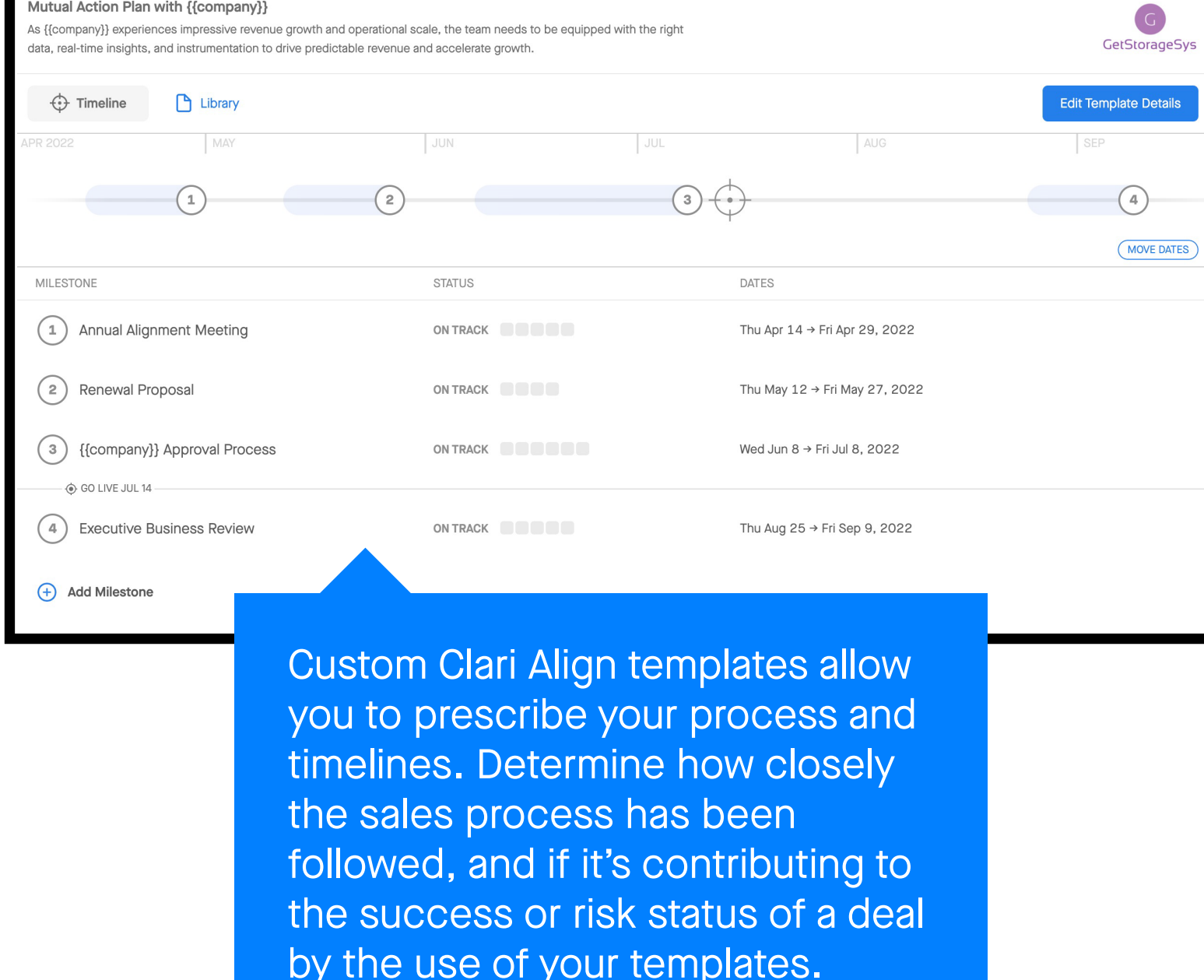
Assess the urgency and validity of a deal by the value proposition at the top of the MAP. If your rep and the buyer have collaborated to create a strong value proposition that includes the pain identified and the metric of value, this will serve as a charter for the deal and will be more likely to close.



The more activity and engagement within the MAP, the more invested your buyer is in their own buying journey. Empower your reps to collaborate early with the buyers to set expectations and create value together.

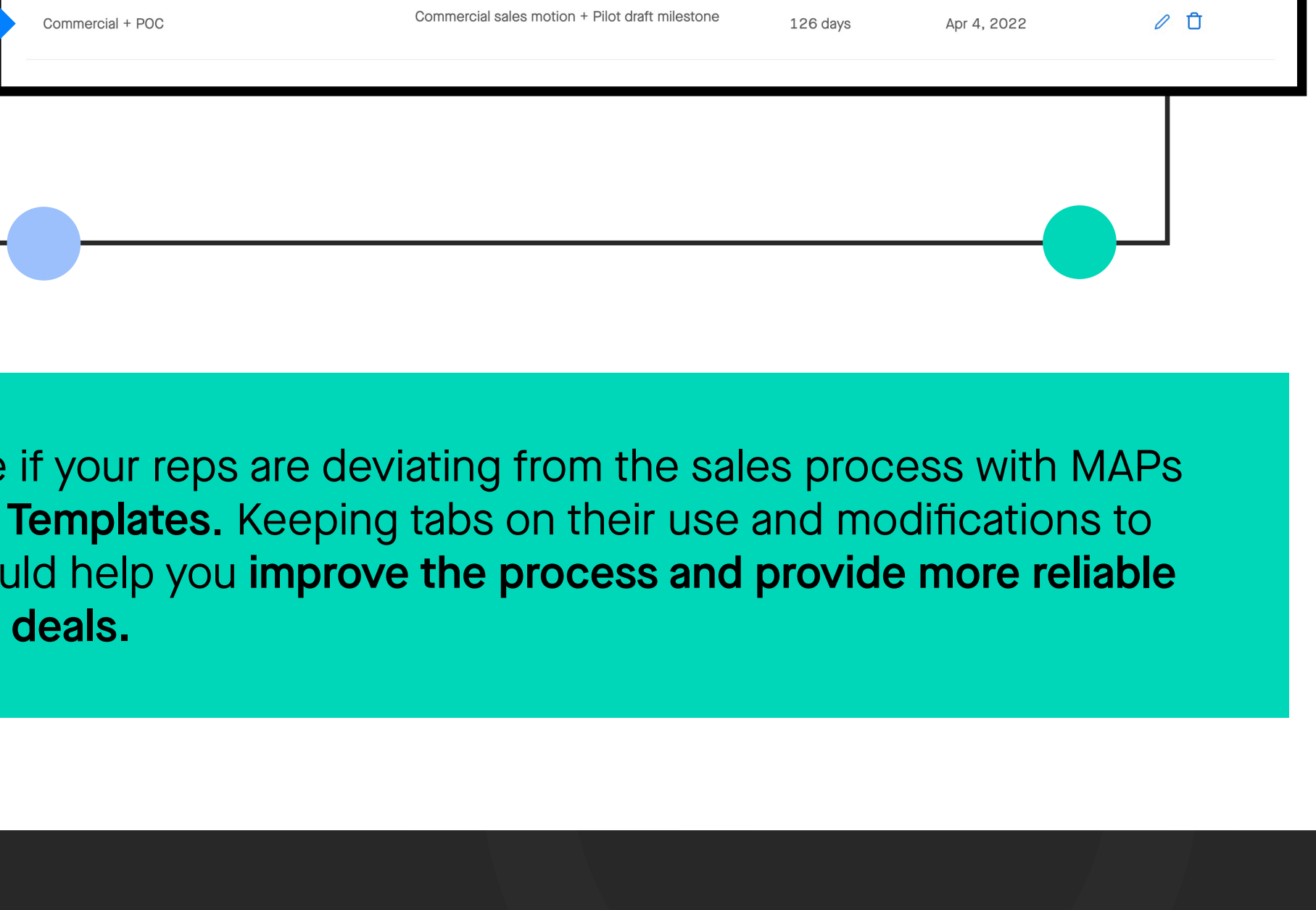
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Assess process adherence across your team



Custom Clari Align templates allow you to prescribe your process and timelines. Determine how closely the sales process has been followed, and if it's contributing to the success or risk status of a deal by the use of your templates.

Assess the use of POC milestones in deals. Standardized templates limit POCs to only the most qualified deals. Keep your reps realistic when requesting internal resources.



You can quickly see if your reps are deviating from the sales process with MAPs. Visual Timeline and Templates. Keeping tabs on their use and modifications to these templates could help you improve the process and provide more reliable timelines for future deals.

Clari Align gives you the visibility you need for precise deal inspections. Go forth and plan your commits with confidence and forecast with accuracy.

Ready for more accurate forecasts and meaningful meetings?

Book some time with us

