



# KPMG Sales Intelligence Engine

## AI-powered B2B Sales Cycle Optimization

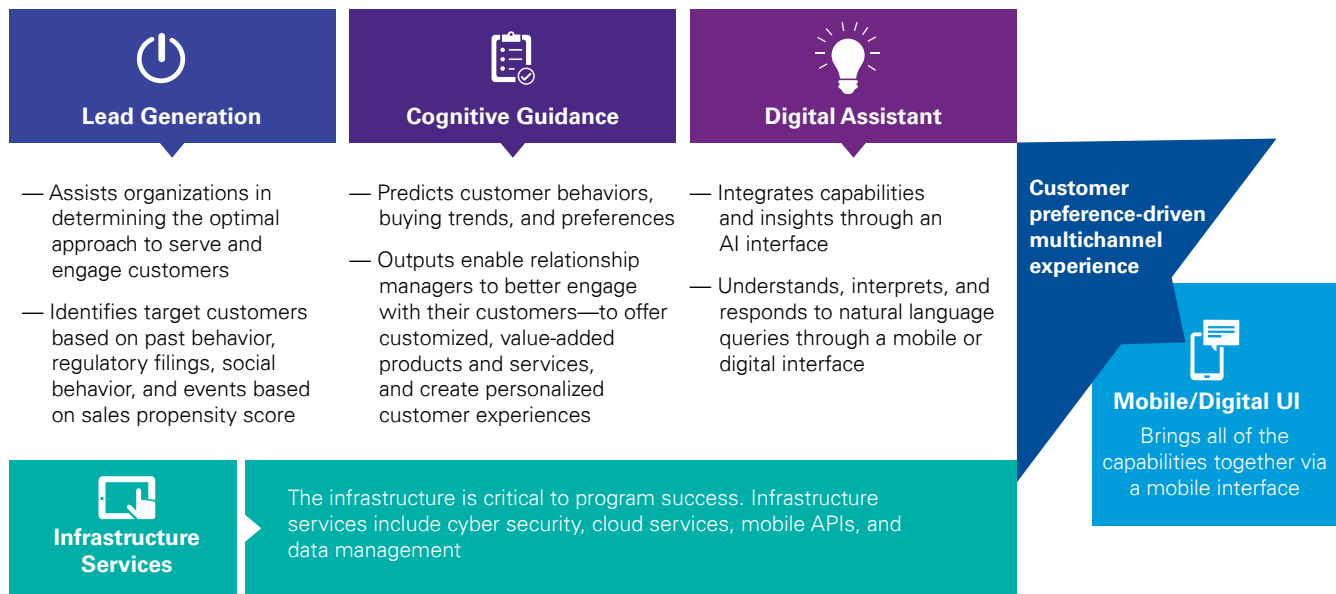


The ability to access and leverage vast amounts of customer information in real time is key to productive business-to-business (B2B) relationships. Traditional B2B sales cycles that rely on disparate data sources and CRM channels present the risk of missed sales opportunities and underperforming client engagement.

KPMG’s Artificial Intelligence (AI)-powered Sales Intelligence Engine addresses this long-standing challenge. With Azure-based technology for its back-end foundation, KPMG Sales Intelligence Engine integrates internal and external data sources and leverages machine learning engines to provide multidimensional customer views, meeting guidance such as “next best steps” and recommended stakeholder contacts, and up-to-date talking points related to that client’s business practices. The ability to harness trusted data to make informed relationship decisions drives value, reduces cost, and optimizes the sales process overall.

### Sales cycle assistance through AI

KPMG Sales Intelligence Engine acts as a sales enablement tool to support three primary functions: targeting and lead generation, guided selling through personalized recommendations, and integrated digital/mobile assistance. These functions can be enabled individually or as a combined capability.



### Automated information management

With KPMG Sales Intelligence Engine, the sales cycle is digitally transformed through automated information management systems, removing the need for manual compilation of information sources. Internal and external data points are collected and integrated into the B2B sales cycle via Microsoft big data and advanced analytic technologies. Meeting feedback, outcomes, and sentiments are brought into the system automatically, providing valuable insights for future interactions and overall relationship health. This rich information base is the foundation for data-driven recommendations.

### Data-driven cognitive guidance

The machine learning algorithms rely on vast computing power to mine data, find historical patterns, and make predictions. Different models are trained and tested in order to answer questions such as how to best approach in person meetings, what product to recommend to each client, and how to tailor topics on a meeting agenda.

### Intuitive user experience design

Built to accommodate the demanding and hectic schedules of sales representatives, the iOS app user interface is designed to be easy to use and intuitive. The information can be accessed through both touch screen and voice control chatbots. Chatbots allow users to communicate and interact with the application in natural language, which helps tailor pragmatic, targeted responses and recommendations based on voice notes.

### Potential benefits of Sales Intelligence Engine

Improved customer experience throughout asset management, marketing, and sales life cycle for all B2B sales functions in all industries



## Contacts

To learn more about how KPMG Sales Intelligence Engine can help your organization, please contact:

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### Daily routine made digital



Before Amy arrives in the office, Sales Intelligence Engine issues an alert that John Smith from a large broker-dealer has been identified as a high-priority interaction.



Amy clicks on the alert and reads that XYZ's quarterly sales volume was much lower than its target.



New to her role, Amy is not familiar with XYZ and spends the remainder of her commute listening to Sales Intelligence Engine walk through the profile of XYZ.



When she arrives in the office, Amy logs in to Sales Intelligence Engine's user interface to start planning next steps. Amy clicks on the "Best Next Action" page within Sales Intelligence Engine to discover that the tool has reviewed visit notes from prior interactions and recommends that Amy meet with XYZ to address concerns regarding product fees discussed during the last interaction with her predecessor.



Sales Intelligence Engine's content and product recommender engines provide detailed topics to Amy for discussion with XYZ's advisers in order to increase sales and reduce redemptions. It also assimilates data from industry data sources to provide information about XYZ.



During the meeting, Sales Intelligence Engine assists Amy by actively listening to the meeting and capturing key topics, sentiments, and intent in order to suggest best next steps postmeeting.



Postmeeting, Sales Intelligence Engine prompts Amy for visit notes. Amy dictates notes around key areas of discussion and her takeaways. A voice-enabled chatbot compiles a key topic summary.



Based on notes from Amy, and topic identification from the meeting, Sales Intelligence Engine prompts Amy to enroll XYZ in low-cost share class campaign and send brochures for new ETFs.

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