



ALTIFY MAX AI

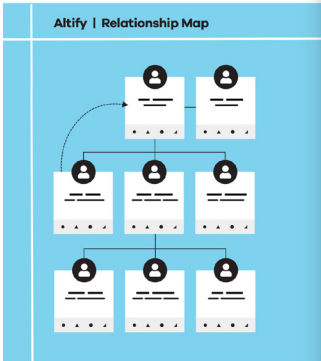
# Selling just got smarter with MaxAI

Automate account planning and deal management in Altify and empower your sellers to focus on what they do best—closing deals and growing revenue.



## The Future of Account Planning and Deal Management

Our AI-powered solutions automate the heavy lifting in account planning and deal management, providing your sellers with actionable insights to drive results. This means less time spent on administrative tasks and more time engaging with prospects and customers.



Altify | Relationship Map

**MaxAI**

Can you identify contacts that should be on the Relationship Map?

The following contacts match the criteria which would indicate they are key contacts that should be added to the Relationship Map.

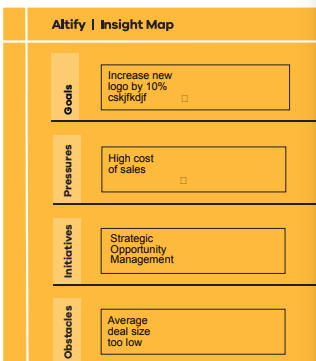
Add the identified contacts to the Relationship Map.

Great, the contacts have been added to the map.

Patti Miller  
Beth Brown

MaxAI

User



Altify | Insight Map

Goals	Increase new logo by 10% cskjfdj
Pressures	High cost of sales
Initiatives	Strategic Opportunity Management
Obstacles	Average deal size too low

**MaxAI**

Can you do account research on Ancaster Engineering?

Ancaster Engineering is a global engineering and construction company.

According to the Ancaster Engineering latest annual report I have identified the following data:

- Goals
- Initiatives
- Pressures
- Obstacles

I also found key contacts that are not on the Relationship Map.

Please populate my Altify Insight and Relationship Map.

MaxAI

User

## Identify key Players

Auto-populate missing contacts and personas on a map so sellers can focus on high-value activities.

- Improve sales productivity by replacing manual search and entry
- Automatically enrich key contact information
- Enable a more strategic approach to relationship strategy

## Uncover buying insights

Accelerate account and deal research, empowering sellers to uncover critical insights.

- Enable sellers to dedicate more time to high-value activities
- Automate external account and opportunity research for key insights
- Elevate account and deal intelligence

## Actionable deal summaries

Convert deal signals into actionable insights, to give sellers a winning edge.

- Arm sellers with intelligent summaries
- Spotlight risks and guide them through key actions
- Deliver real-time coaching to uncover key insights

Altify | Qualification

+ Add Competitor

✓ Is there an opportunity?

Increase new logo by 10%	<input checked="" type="checkbox"/>
Increase new logo by 10%	<input checked="" type="checkbox"/>
Increase new logo by 10%	<input type="checkbox"/>
Increase new logo by 10%	<input checked="" type="checkbox"/>

MaxAI

Can you summarize this opportunity?

User

This opportunity is associated with Ancaster account. It has a value of \$650,000 ARR and is currently at Stage 4. The probability of closing this deal stands at 80%. The expected closing date is Aug 29, 2024.

**Opportunity Risks:** Based on your Altify Plan, the following risks have been identified.  
**Opportunity Assessment:** The following questions need to be answered affirmatively.

- Access to Funds
- Compelling Events
- Unique Business Value

MaxAI

Altify | Plan Details

Plan Details Opportunity Map

✓ Goal and Growth Strategies

> 1 \_\_\_\_\_

> 2 \_\_\_\_\_

> 3 \_\_\_\_\_

> 4 \_\_\_\_\_

> Customer Profile

> Customer Success

MaxAI

Can you do account research on Ancaster Engineering?

User

**Account Description:** Ancaster Engineering is a global engineering and construction company that offers professional and technical solutions.

According to my research, I have identified the following data:

- Mission
- Values
- Vision
- Strategic Focus

MaxAI

Please populate my Account Plan Details.

User

## Strategic account planning

Automate account research to develop winning strategies that drive success.

- Maximize sellers time
- Auto-populate essential account data
- Elevate account intelligence

## Strategic deal execution

Streamline deal planning and execution with automated competitive intelligence.

- Identify top competitors
- Automate competitive insights
- Enable sellers to regain valuable time progress the deal

Altify | Qualification

+ Add Competitor

✓ Is there an opportunity?

_____	<input checked="" type="checkbox"/>
_____	<input checked="" type="checkbox"/>
_____	<input type="checkbox"/>
_____	<input checked="" type="checkbox"/>

MaxAI

Can you identify my top 2 competitors for this deal?

User

Sure – your top 2 competitors for this deal are?

- RK Strategies
- VictorTech

According to my research, I have identified the following data for each company.

- Strengths
- Weaknesses

MaxAI

Please populate this information into the opportunity assessment.

User

## AI powered sales productivity

We're building an expanding library of Altify-engineered workflows and signals that power MaxAI, increasing sales productivity across account planning and deal execution.



### Increased sales productivity

Automate routine tasks to drive higher efficiency, giving sellers more time to focus on high-value activities.



### Enhanced decision-making

AI-driven insights empowering sellers with the data they need to make informed decisions, identify opportunities, and mitigate risks.



### Improved sales performance

Streamlined account planning and deal management giving sellers time to focus on closing deals and accelerating revenue growth.



*We use also Altify Relationship Map to expose risk. Too few or too many contacts could mean you are spending time with the wrong people."*

**Sarah Bennett**

VP, GTM Revenue Operations & Enablement, Informatica

# 59%

of buyers say sellers don't understand their goals.

Source: Salestarce "State of Sales"

# 30%

of sellers time currently spent actually selling.

Source: Salestarce "State of Sales"

# 94%

of sales leaders eager for sellers to extract more value from customer data.

Source: Salestarce "State of Sales"

### Altify Accounts

Unlock growth potential

### Altify Insights

Unleash the power of connections

### Altify Opportunities

Boost deal size and win rates

### Altify Sales Process

Accelerate sales cycles



## Complement your sales tech stack with Altify's AI-powered suite of Salesforce native solutions

Combine innovative technology with expert strategy and methodology for account planning, opportunity management, and more.

- **Altify Accounts**
- **Altify Insights**
- **Altify Opportunities**
- **Altify Sales Process**

## Used by leading sales organizations around the world



GE HealthCare



AUTODESK



Honeywell

Johnson Controls



## Ready to get things done?

Contact us to learn how Altify MaxAI can help automate account planning and deal management.

**Get in touch**

Altify is the Account Planning AI Cloud helping sales teams grow revenue by planning smarter.

Altify was founded on a core belief: strategic B2B selling puts the customer at the center. We know sales success isn't just about selling something—it's about creating mutual value, which demands a solid plan. Our mission is to shape the next generation of sales leaders. We equip revenue teams with proven methodology, strategy, and technology to foster a customer-first mindset that strengthens relationships and wins more opportunities. Altify is not just software, but rather full-service sales transformation, powered by software. Our expert team helps sales organizations build and scale successful, tailored methodology-backed programs, with wholistic support from sales strategy and training to technical implementation. We ensure long-term customer value, proudly helping the world's best sales teams deliver unparalleled results. See how Altify can transform your revenue operations at [altify.com](https://altify.com)