Pipeliner

Voyager AI:
Charting a Course for Sales Excellence with Pipeliner CRM

PIPELINER CRM
VOYAGER AI

TABLE OF CONTENTS

Introduction

In the dynamic landscape of modern sales, navigating the vast universe of customer data and market complexities can feel like exploring uncharted territory. Sales teams are constantly seeking tools that provide clearer vision, deeper insights, and the ability to move with greater speed and precision. Just as NASA's Voyager probes embarked on a historic journey of discovery, venturing into the far reaches of our solar system to uncover the secrets of distant worlds, Pipeliner CRM's cutting-edge AI component, **Voyager AI**, propels sales teams into new realms of insight and opportunity.

Voyager AI is not merely a set of features; it is a strategic **Wingman** designed to help sales professionals navigate the sales landscape with precision and confidence. By tirelessly analyzing vast amounts of CRM data, Voyager AI reveals **patterns, trends, and possibilities** that are often invisible to the naked eye. This intelligence empowers teams to make smarter strategies and achieve stellar results. This whitepaper explores how Voyager AI transforms raw data into strategic guidance, streamlines operations, and empowers sales teams to achieve unprecedented levels of success, much like the Voyager probes expanded our understanding of the cosmos. Join us as we embark on this voyage of discovery with Pipeliner CRM and Voyager AI.

The AI Landscape in CRM

The world of technology is experiencing rapid and significant change, with **artificial intelligence moving very quickly** across all sectors. This acceleration is having a particular and substantial impact on the Customer Relationship Management *(CRM)* market. The CRM market is projected for incredible growth, expected to more than double from just over $100 billion in 2024 to over **$200 billion by 2032**. This growth is significantly driven by innovations in AI.

While AI offers immense potential, it also raises important considerations regarding **ethics and bias**. Without transparency, particularly through open-source development, it is difficult to detect and mitigate bias within AI systems. Examples of revealed biases on major platforms emphasize the critical need for ethical guidance built into AI. Just as a lie detector is designed to reveal untruths, there is a need for mechanisms to detect if AI systems are not providing factual or unbiased information.

As AI rapidly transforms CRM, Voyager AI rises to meet the moment—powered by trusted technologies, guided by ethics, and built to deliver transparent, bias-aware intelligence for the future of customer engagement.

Pipeliner CRM addresses the integration of AI by partnering with market leaders in AI business services. Pipeliner leverages **Amazon Web Services *(AWS)***, specifically utilizing services like **Amazon Bedrock Data Automation**, which offers access to numerous AI models. This allows Pipeliner to select and implement suitable models for various AI functionalities within Voyager AI. Pipeliner began developing AI solutions in 2023 and has consistently released new AI tools since then, integrating models like Claude 3.5 Haiku, gtp4-turbo, Amazon Comprehend,

Amazon Polly, Amazon Transcribe, and Twilio Voice Intelligence for different features.
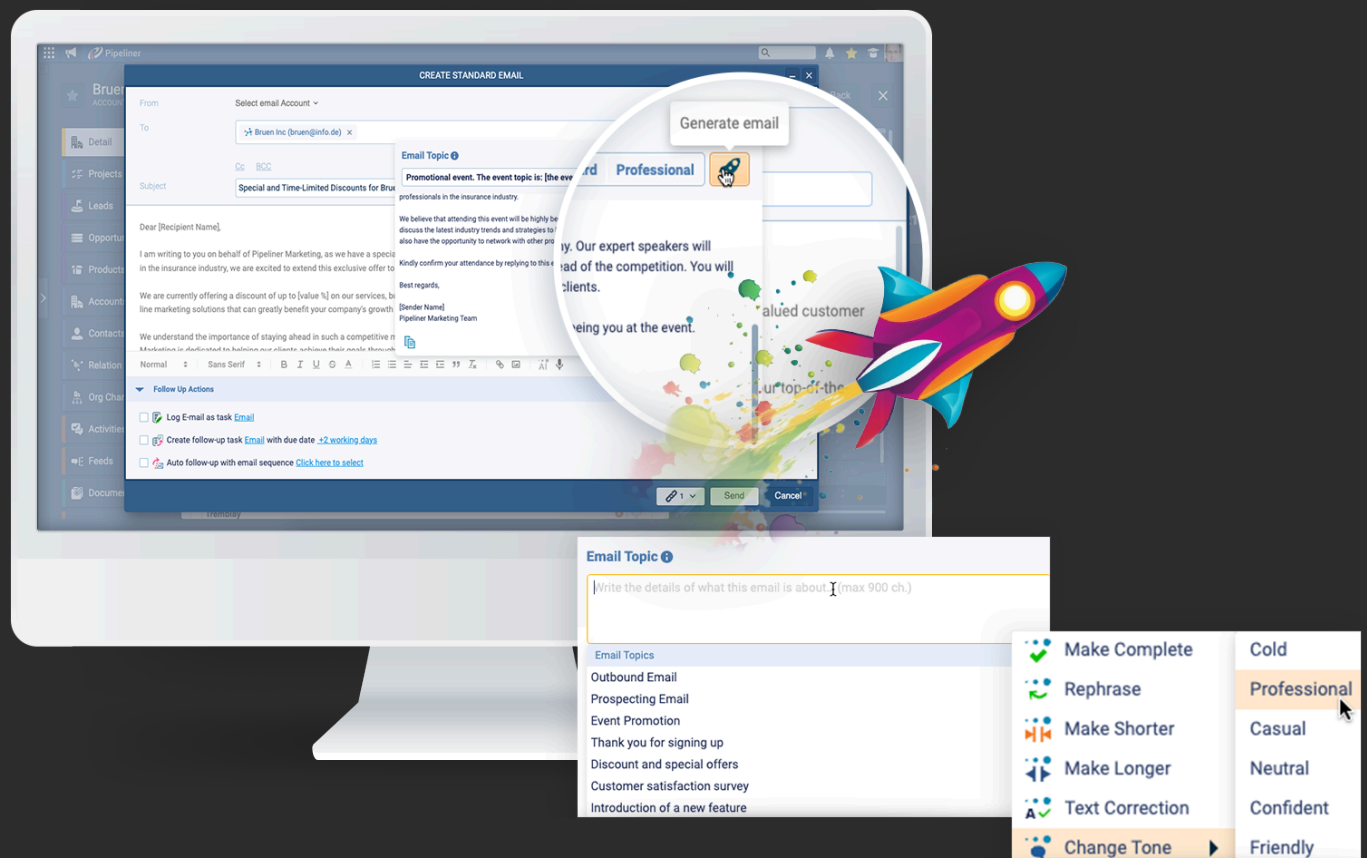
The Foundation of Effective AI: Data and Process

The effectiveness of any AI system is fundamentally dependent on the quality of the data it processes. Computer programming has a long-standing principle known as **GIGO: "Garbage In, Garbage Out"**. This means that if the data fed into the system is flawed, the results will be equally flawed and ultimately worthless. This principle is certainly the case for AI; it **cannot do its job if it isn't provided with accurate data**. A compelling example provided relates to COVID-19 statistics, where deaths were statistically attributed to COVID based on a positive test, even if the actual cause of death was unrelated. If AI analyzes such data, it

The Data Quality Cycle in AI

- Refine Data
- Collect Data
- Ensure Data Quality
- Process Data
- Analyze Data
- Evaluate Results

cannot provide a factual analysis of the pandemic's true impact. Therefore, the **first level of AI effectiveness is based on correct data**.

AI is only as smart as the data and processes behind it. Like Voyager exploring with purpose, true AI effectiveness begins with clean data and evolves through intelligent automation built on well-defined business rules.

Beyond accurate data, the second crucial level for AI effectiveness is **process automation**. This involves the process that utilizes the correct data. Process automation is unique to each company and is built upon its specific business rules. Automation cannot be built from scratch; it requires a well-defined process based on these rules. An example of this is Robotic Process Automation *(RPA)*, which uses software to automate repetitive, rule-based tasks by mimicking human interaction with digital systems.

It is also important to understand the difference between data-driven and process-driven AI. Data-driven AI, often leveraging **machine learning**, requires vast amounts of data to identify patterns. An example is AI sorting through radiology scans, learning from thousands of images to identify what looks "good" or "bad," such as the presence or absence of heart failure or lung problems. Providing millions of data points helps ensure the accuracy of this type of AI. Process-driven AI, on the other hand, goes a step further. While machine learning might identify the presence of lung cancer in an image, the AI process would analyze the underlying causes of those cancers, aiming to inform actions that could prevent deaths. The future, will require truly intelligent processes. Businesses must thoroughly understand their own processes to effectively program and build AI agents.

Pipeliner's first AI agent, for Online Forms, is built on the Claude 3.5 Haiku model within Bedrock and was trained based on Pipeliner's processes. Once a process is trained, it can be further refined using Large Language Models *(LLMs)*, which learn as they are trained.
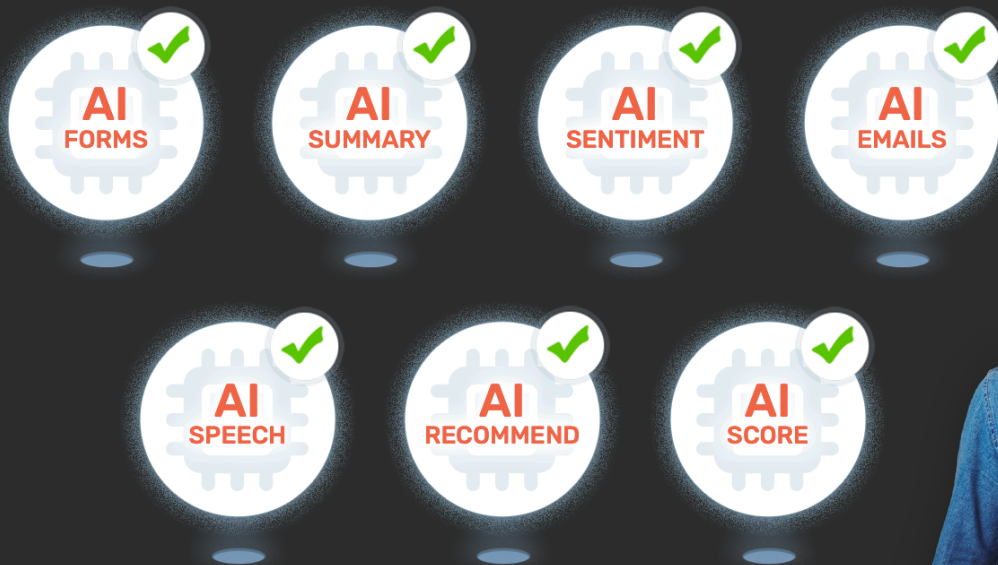
The "Voyager" Philosophy: Augmenting Humans, Not Replacing Them

Pipeliner CRM's philosophy for implementing **AI is clear: AI in B2B sales should support human salespeople, not replace them**. Pipeliner strongly advocates for augmenting human capabilities rather than automating the core sales interaction.

This philosophy is particularly evident in Pipeliner's stance on **AI Sales Development Representatives *(SDRs)***. Despite significant investment in this area by some, Pipeliner finds this approach **counterproductive**, particularly for the consulting sales approach in the B2B arena. While robot agents can reach thousands of prospects rapidly, it is questionable if these interactions truly open the door to sales. A key limitation is that a robot agent **will never be as intuitive, empathetic, or socially intelligent as a human**. They cannot flexibly adapt to unexpected conversational turns or handle customer concerns or frustrations with the necessary human touch. Pipeliner would never use AI for direct interaction with their own customers, prioritizing relationship building over treating customers like numbers. This is why their support follows a unique "wingman" approach, ensuring customers always talk to a person. Pipeliner has tested AI SDR products and found them not useful.

Instead, Pipeliner believes AI becomes useful when it **provides human salespeople with the data they need to connect personally**. Having comprehensive information about a prospect or customer – company size, latest news, encountered issues, etc. – empowers the salesperson with an "in" for the

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conversation and allows them to **bring value to that interaction**. Crucially, AI providing this information saves valuable time during meetings by eliminating the need for the salesperson to ask basic qualifying questions. The future of AI in B2B, lies not in direct selling but in **tremendous support for doing so through human interaction**. This foundational belief underpins the development and application of Voyager AI within the Pipeliner platform.

Uncovering Opportunities: Predictive Insights and Customer Understanding
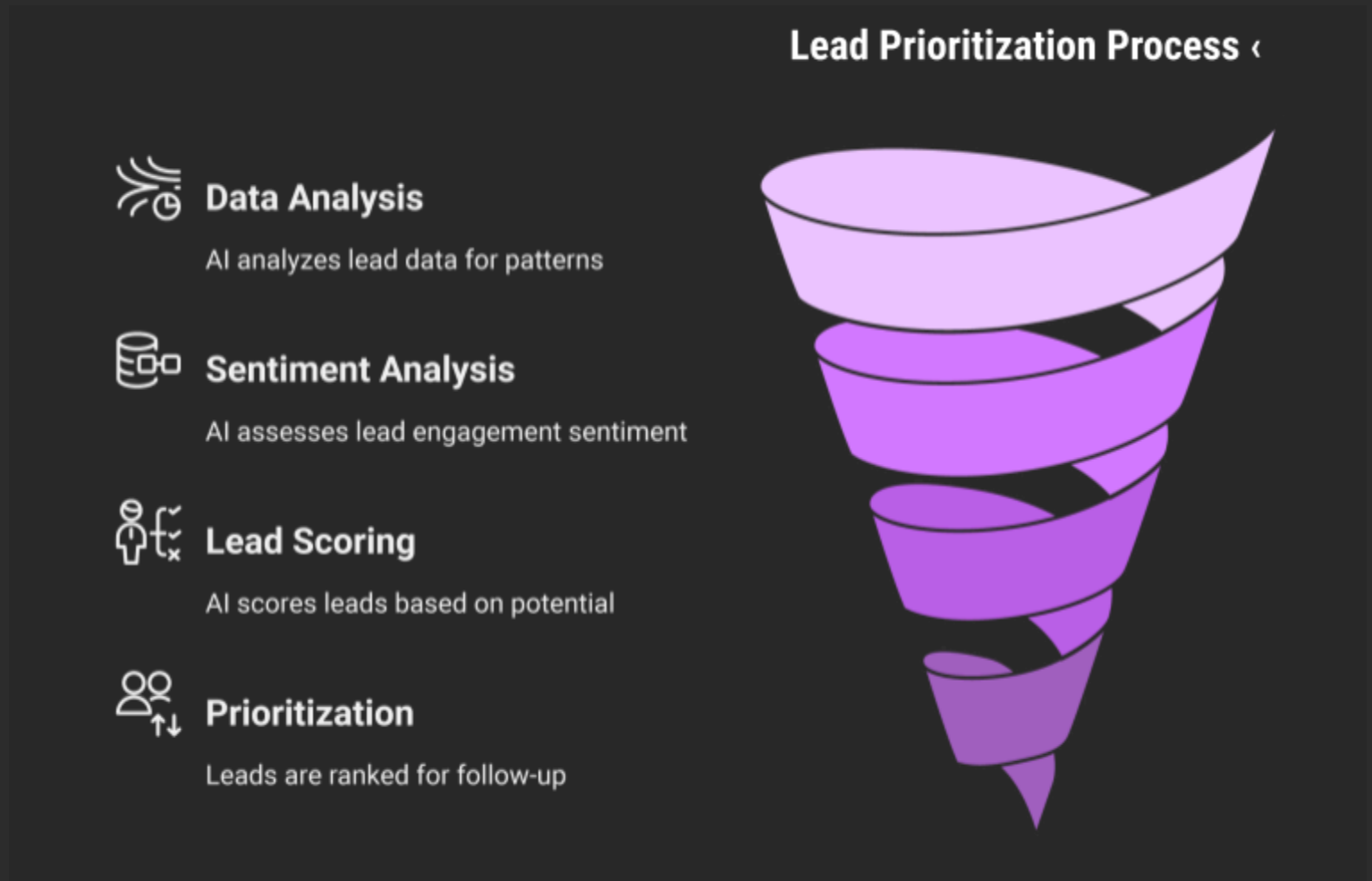
Voyager AI is designed to help sales teams **uncover hidden opportunities** within their CRM data. It goes beyond surface-level analysis to reveal patterns, trends, and possibilities that might otherwise be missed.

One key area is **Voyager AI Customer Insights**. This feature delivers **deep visibility into customer behavior**, enabling more personalized strategies and proactive account management. It analyzes interactions across various touchpoints to identify behavioral patterns. These insights extend to customer preferences, buying signals, and crucial **churn risks**. The benefits include enabling **hyper-personalized outreach**, boosting engagement, enhancing forecasting by predicting customer actions, and **reducing churn by identifying at-risk accounts early**. A use case example would be how AI flagging a customer with declining engagement can prompt a rep to proactively offer a loyalty discount, helping to retain the account.

> *Voyager AI uncovers hidden patterns, prioritizes high-value leads, and predicts outcomes—empowering sales teams to act with precision, deepen customer understanding, and seize opportunities before they're visible.*

Related to identifying potential, Pipeliner offers **Voyager AI Lead Scoring**. This AI-powered feature complements Voyager AI's predictive insights by **prioritizing high-value leads**. It uses pre-defined and custom scoring criteria based on various factors like field values, activities, and email interactions. The scores are

displayed prominently in a Lead Scoring widget for easy prioritization. This automates lead qualification, reducing manual effort and ensuring focus on high-potential leads. A use case example would be how Voyager AI's sentiment analysis identifying an engaged lead combined with a high lead score prompts immediate follow-up.

Lead Prioritization Process ‹

Data Analysis

AI analyzes lead data for patterns

Sentiment Analysis

AI assesses lead engagement sentiment

Lead Scoring

AI scores leads based on potential

Prioritization

Leads are ranked for follow-up

Furthermore, **Voyager AI Predictive Insights and Forecasting** significantly enhances forecasting accuracy. It analyzes historical and real-time data to **predict deal outcomes** and provides dynamic forecasting updates as the pipeline changes. This functionality guides strategic planning with data-driven

confidence. A use case example would be how AI predicting a 70% close probability for a deal allows a manager to effectively allocate resources.

Voyager AI transforms CRM data into actionable intelligence—revealing hidden opportunities, guiding smarter forecasts, and helping sales teams stay one step ahead with data-driven precision.

These features collectively empower sales teams to navigate the sales landscape with precision by providing intelligence to find opportunities, understand customer needs, and predict future outcomes.

Streamlining Communication: Summaries, Assistants, and Transcriptions

Effective communication management is vital in sales, and Voyager AI offers several features to streamline these processes, saving time and enhancing quality.
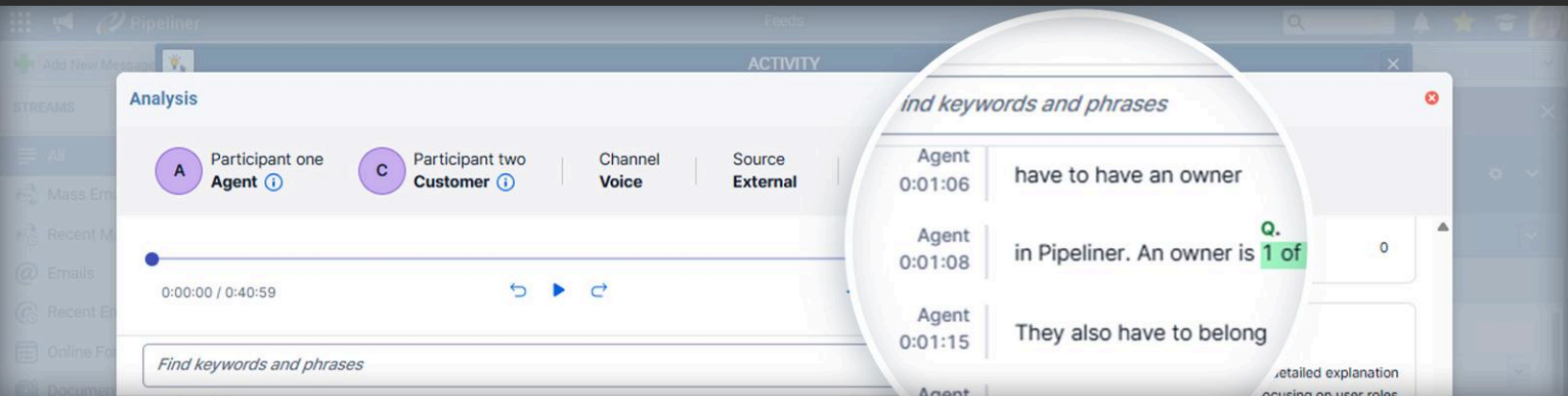
The **Voyager AI Summary & Action Points** feature transforms raw communications into strategic guidance. It generates **summaries and actionable next steps** for emails, text messages, and notes within the Feeds tab of a record. The primary benefit is reducing the time spent reviewing lengthy correspondence, allowing reps to quickly grasp key discussion points. It also prioritizes critical tasks by suggesting action points, such as follow-up tasks or meeting schedules, ensuring seamless follow-through and enhancing productivity by focusing reps on high-impact actions. A use case example would be how, after a complex email thread, AI summarizes key points and suggests scheduling a demo as a task.

This feature is analogous to the Voyager probes distilling cosmic data into meaningful reports.

The **Voyager AI Email Assistant** automates and enhances email management. Its functionality includes:

- ✓ **Categorization:** Assigning tags based on content, context, and intent, including analyzing sentiment *(positive, neutral, negative)* to assess customer mood.
- ✓ **Summarization:** Generating concise summaries of emails.
- ✓ **Content Improvement:** Suggesting enhancements for clarity, tone, and professionalism in email drafts.
- ✓ **Email Generation:** Creating new emails based on user prompts, tailored to specific contexts.

The benefits are significant: saving time through automation, enhancing communication quality, enabling personalized and efficient outreach, and prioritizing responses based on urgency and sentiment. A use case example would be how AI summarizes a lengthy customer email, tags it as "urgent" due to negative sentiment, and generates a draft response for the rep to customize. This assistant integrates with Pipeliner's email tools and is accessible in the Feeds tab or email composition interface. It is likened to the Voyager probes sorting and analyzing cosmic signals.
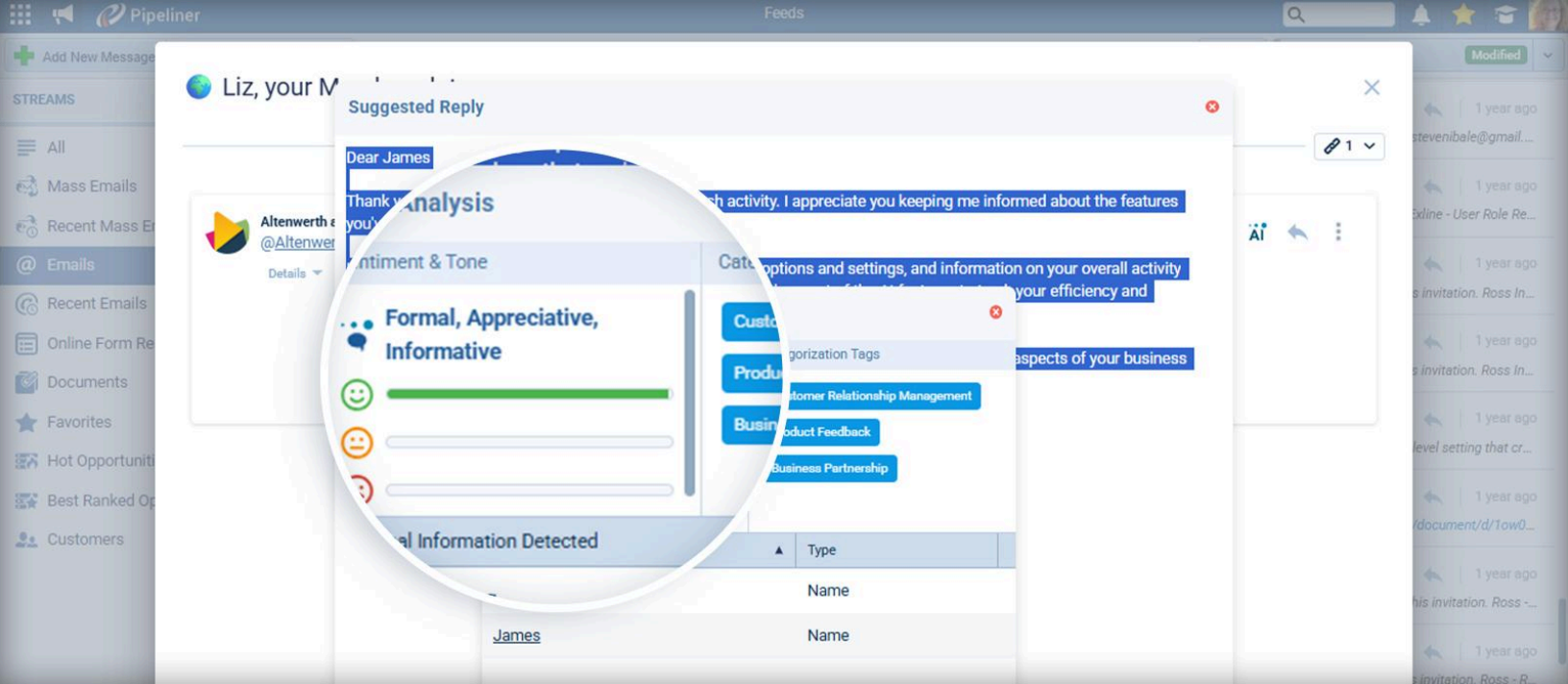
Like Voyager probes decoding signals from space, Voyager AI turns sales calls into strategic insights—transcribing, analyzing, and uncovering customer needs to guide smarter follow-ups.

Finally, **Voyager AI Call Transcription & Analysis** enhances the Calling & Messaging integration. It automatically **transcribes recorded sales calls** using Amazon Transcribe. More importantly, it analyzes the content to **extract key points, sentiments, and action items**. This turns conversations into valuable strategic assets, helping uncover customer pain points and opportunities from call data. It provides summaries for quick review, reducing manual note-taking, and supports coaching by enabling managers to analyze call performance. A use case would be a rep reviewing a transcribed call to identify budget concerns, allowing them to tailor a follow-up proposal. This feature is analogous to the Voyager probes capturing signals from distant planets, decoding conversations into critical insights.

Enhancing Efficiency and Accessibility: Documents, Forms, and Audio

Beyond managing communications, Voyager AI extends its capabilities to other crucial sales assets like documents and forms, while also improving accessibility.

The **Voyager AI Document Summary & Chat** feature brings AI-powered analysis to Pipeliner's Document Management system. It can **generate concise summaries of documents**, such as contracts or proposals, saving significant time otherwise spent reviewing lengthy files. A unique functionality is the **chat interface**, allowing users to **query document content** and retrieve specific details on demand. This enhances decision-making by providing quick access to relevant information and supports collaboration as teams can query documents without manual review. A use case would be a rep using the chat to quickly find payment terms in a contract, speeding up negotiations. This feature is compared to the Voyager probes scanning celestial objects to extract insights.

Like Voyager probes scanning the stars, Voyager AI scans documents—summarizing key points and answering questions instantly, turning complex files into quick, actionable insights.

The **Voyager AI Online Forms AI Agent** streamlines the creation and management of online forms within Pipeliner CRM. This agent assists in creating

new forms by **generating form structures based on user prompts** or business needs and can also edit existing forms to improve clarity or functionality. It suggests form fields and configurations specifically designed to **optimize data capture** for leads, contacts, or accounts. Benefits include saving time on form design, improving data quality through relevant field suggestions tailored to sales processes, and enhancing the customer experience with user-friendly, targeted forms. A use case would be the agent generating a lead capture form for a marketing campaign, including suggestions for optimizing segmentation. The analogy here is the Voyager probes designing instruments to collect cosmic data, with the feature crafting forms to gather critical customer insights effectively.

For improved accessibility and efficiency, **Voyager AI introduces text-to-speech** functionality. This feature allows users to **listen to notes, AI-generated summaries, and rich text fields**. Using Amazon Transcribe, it converts text into natural-sounding audio. This is particularly beneficial for reps on the go, allowing them to consume information hands-free, boosting efficiency. It also improves accessibility for users who prefer auditory processing and streamlines the review of lengthy or complex content. A use case would be a rep driving to a meeting listening to an AI summary of client interactions. This feature is analogous to the Voyager probes transmitting data across vast distances, delivering insights directly to your ears.

Real-Time Navigation and Data Security

In the fast-paced world of sales, having access to timely information is critical for making informed decisions and staying competitive. **Voyager AI Real-Time Insights and Recommendations** delivers instant analytics and suggestions, ensuring agility in dynamic sales environments.

This functionality provides **real-time insights** on key aspects such as pipeline health, customer engagement, and team performance. Going beyond simple reporting, it offers **AI-driven recommendations** aimed at optimizing sales strategies.

Like Voyager probes beaming real-time data from space, Voyager AI delivers instant sales insights and smart recommendations—securely guiding teams with precision and speed.

The benefits are clear: it enables **rapid, informed decision-making** and reduces the need for manual reporting through automated insights. This feature integrates with Pipeliner's visual pipeline and reporting tools. Its ability to beam instant insights mirrors the **Voyager probes' real-time data transmission**, keeping the sales team ahead of the curve.

Across all of its features, Pipeliner emphasizes the importance of **data security**. Data processing for features like Summary & Action Points, Text-to-Speech, Email

Assistant, Call Transcription & Analysis, and Document Summary & Chat **occurs within Pipeliner's secure database or environment**.

That there is **no background data scanning**. This commitment to keeping data processing within Pipeliner's secure infrastructure ensures confidentiality and protects sensitive customer information while leveraging the power of AI.

The Voyager Analogy and Broader Vision

The naming of Pipeliner's AI component as "Voyager AI" is deeply intentional, drawing a powerful analogy to NASA's historic Voyager space probes. The original Voyager missions represented a journey into the **uncharted cosmos**, uncovering secrets of distant worlds. Similarly, Voyager AI explores the vast universe of customer data to deliver transformative discoveries for sales.

The probes were marvels of 1970s technology, traveling billions of miles beyond Earth, crossing the heliosphere into **interstellar space**, yet still communicating with Earth. This journey provided unprecedented perspective on our place in the

Universe
Infinite expanse of space

Pale Blue Dot
Earth's perspective from afar

Interstellar Space
Vastness beyond our solar system

Voyager Probes
Pioneering space exploration
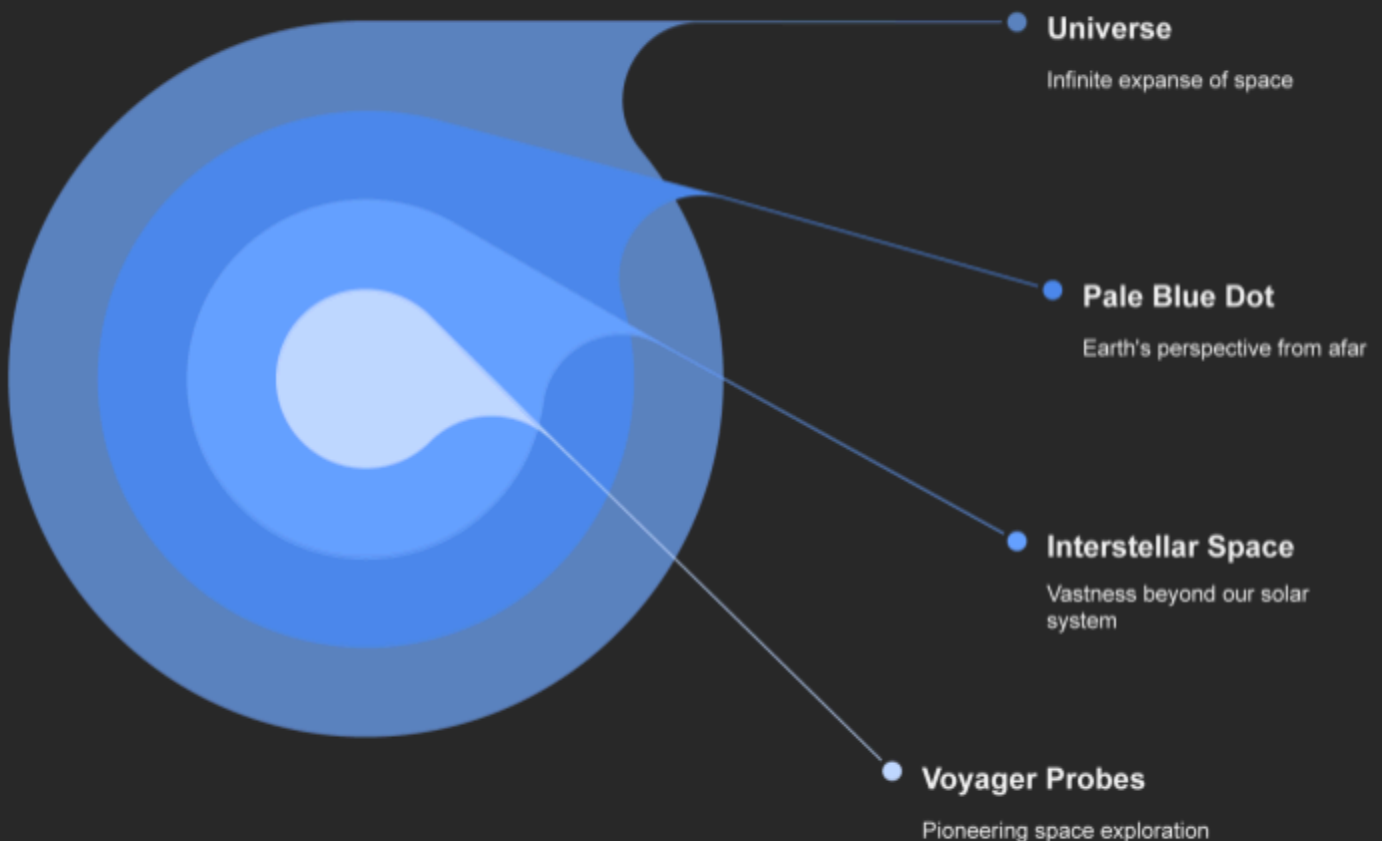
universe. Looking back, Earth appears as a "**pale blue dot**," a tiny pixel in the vast cold, icy darkness. This perspective, gained from traveling immense distances, highlights the incredible scale of the universe compared to our seemingly enormous world.

Pipeliner connects this analogy to Voyager AI in several ways:

- ✓ **Speed and Scale:** Just as the Voyager probes traveled far beyond previous human endeavors, the speed and scale of data combinations processed by Voyager AI are far beyond anything done before in computing, representing a move into a new kind of "interstellar space" for sales data analysis.
- ✓ **Data and Decision-Making:** The Voyager probes provide data about "out there," and Voyager AI similarly brings in data points from the sales "universe". The crucial parallel is that **AI should not make decisions for us; it should help us make our own decisions** by providing information. AI is a technology, a machine, and it is up to humans to act wisely on the data it provides.
- ✓ **Perspective:** Just as the probes give us perspective on our tiny planet from billions of miles away, Voyager AI provides a huge amount of information that gives perspective for making better business decisions.

The broader implications of AI, like the discoveries from the Voyager probes, lie in revealing aspects of society, technology, and life that have remained unseen. AI has the potential to expose the core of complex, little-understood problems and perhaps even reveal unknown aspects of ourselves. AI can help humanity advance, particularly by connecting disparate disciplines like biology, mechanics, and physics.

Ultimately, this aligns with a deeper, philosophical vision. The perspective from space, the "pale blue dot," underscores how fragile humanity is on this tiny planet and emphasizes the need for cooperation and peace. By providing massive

information, AI might help us understand ourselves better and move beyond thoughtless, emotional actions and conflicts.

Like the Voyager probes revealing the unknown, Voyager AI illuminates hidden truths—guiding better decisions, deeper understanding, and a shared journey toward peace, fairness, and wisdom.

For Pipeliner, if Voyager AI can help business leaders make intelligent and holistic decisions, it brings them closer to their core philosophy: **WIN TOGETHER**. This philosophy is built on the principles of **peace, fairness, and joy**. By empowering users with knowledge and wisdom derived from AI insights, Pipeliner aims to help them embody this philosophy. This is the profound reason behind the name Voyager. Notably, Pipeliner contrasts their choice to name their AI after a mission/machine with naming it after a human *(like Salesforce's "Einstein")*, emphasizing that AI will never be human and lacks qualities like empathy and compassion.

Conclusion

Voyager AI in Pipeliner CRM is a stellar suite of AI tools that truly embodies the exploratory spirit of NASA's Voyager probes. It is designed to transform the CRM into a powerful spacecraft, enabling sales teams to navigate the complexities of the modern market with ease and precision.

Embodying the spirit of NASA's Voyager, Voyager AI is your sales wingman—automating tasks, uncovering insights, and guiding you through the CRM universe with precision, speed, and security.

From automating email management and generating summaries to providing predictive forecasting and real-time recommendations, Voyager AI covers a wide spectrum of critical sales activities. Key functionalities include:

- ✓ Summarizing communications and suggesting actions.
- ✓ Converting text to speech for accessibility and efficiency.
- ✓ Assisting with email composition, categorization, and sentiment analysis.
- ✓ Transcribing and analyzing sales calls for insights.
- ✓ Summarizing documents and enabling chat queries.
- ✓ Helping create and optimize online forms.
- ✓ Delivering deep customer behavior insights.
- ✓ Prioritizing high-value leads with scoring.
- ✓ Enhancing forecasting accuracy with predictive analytics.
- ✓ Providing real-time insights and recommendations.

Voyager AI Sales Enhancement Funnel ‹

Communication Enhancement

Sales Activities

Call Analysis

Lead Prioritization

Enhanced Sales Performance

Email Assistance

Document Management
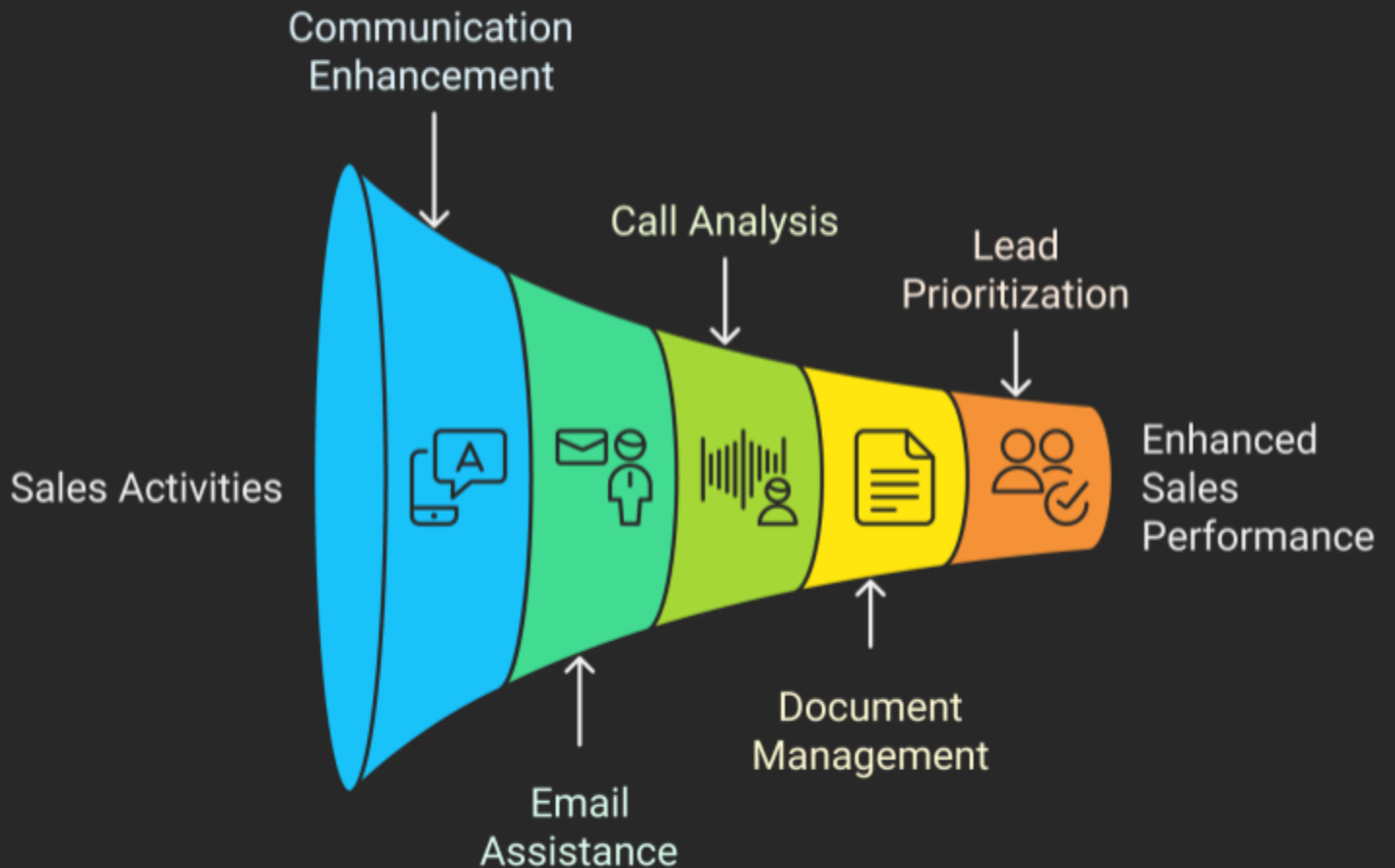
By automating repetitive tasks, uncovering hidden opportunities, and delivering real-time guidance, Voyager AI empowers sales teams to focus on building relationships and closing deals, accelerating growth and boosting efficiency. The consistent emphasis on processing data within Pipeliner's secure environment across features highlights the commitment to data protection.

Voyager AI is your Wingman on a mission to accelerate growth, helping you explore new horizons and navigate with confidence. It allows you to make

data-driven decisions backed by AI precision, streamline processes, and stay ahead of the curve.

Ready to explore the future of sales and discover a universe of possibilities? **Embark on your sales journey with Voyager AI.**

↳ **Visit <u>Pipeliner CRM</u> ⤤ for a demo or free trial today**

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