

AI does the work. Your reps close the deals.

Reps spend only 30%* of their time selling. The rest disappears into research, data entry, and prep.

Every call requires hours of account research. Scorecards get filled out five minutes before deal reviews. Methodology training fades within weeks. By the time managers spot qualification gaps, the deal is already at risk.

The best reps sell. Everyone else administers.

	Opportunity	Deal Risk	Engagement Level	Predicted Stage	Upsell Potential
1	Epsilon: Land & Expand Deal	HIGH	27%	QUALIFICATION	Yes - Recent funding found via public
2	Renewal - Apex Tech				
3	Infinity Sales Expansion				
4	Insight Cross-Sell				
5	Luminous Foundation Close				
6	Matsen Enterprise Expansion				
7	KrewSystems Renewal FY26				

ClosePlan puts AI to work so your reps can focus on what they do best.

Click a button. AI researches the account, qualifies the deal against your methodology based on real conversations, and builds a relationship map showing who's engaged, who has buying power, and where the gaps are. Your team works from one source of truth - always current, always complete.

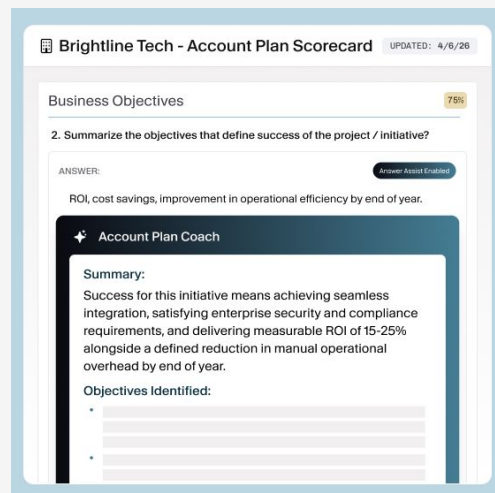
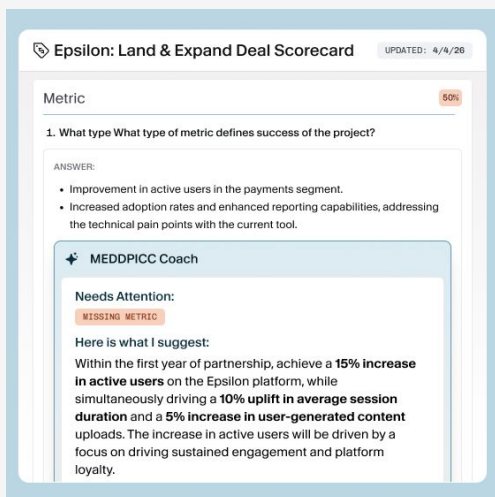
Your reps show up prepared. Your methodology sticks. Your pipeline reflects reality.

*Salesforce State of Sales, 2024

How modern sales leaders close deals

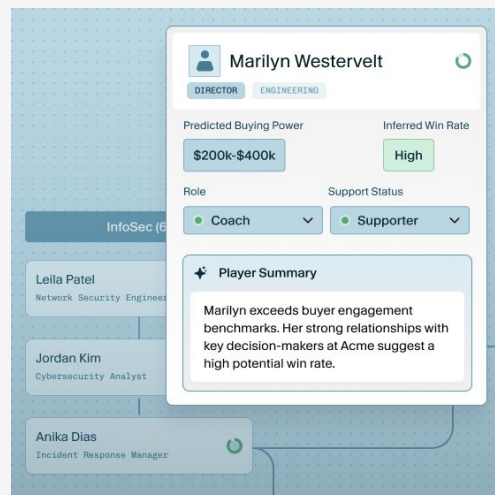
Research every account in minutes, not hours

A new rep inherits 50 accounts with no context and no history. One click per account and *Automated Account Plans* do the research - business priorities, recent news, and full CRM history. The rep reviews, owns the strategy, and shows up prepared. Customer Success gets the same complete context at handoff. No starting from scratch.



Qualify deals with one click

You invest in a sales methodology. Three months later, deal reviews still miss half the criteria. *Automated Opportunity Scorecards* qualify every deal against your methodology automatically - based on what was actually said across emails, calls, and meetings. Managers see gaps before pipeline reviews. Reps get coached on how to close them.



Know exactly who to engage and why

Org charts go stale the moment they're built. *Automated Relationship Maps* update themselves based on real engagement - who's involved, their department, seniority, buying power, and how engaged they've been. Reps know exactly who to engage and why. Leaders walk into every deal review with a complete picture of the buying committee.

Andrew Brown

"In high-performing sales teams, clarity is everything - visibility into activity, pipeline and execution is what fuels better decisions, faster course of correction, and more predictable outcomes."

Senior Vice President and Chief Revenue Officer, Red Hat