tact.ai

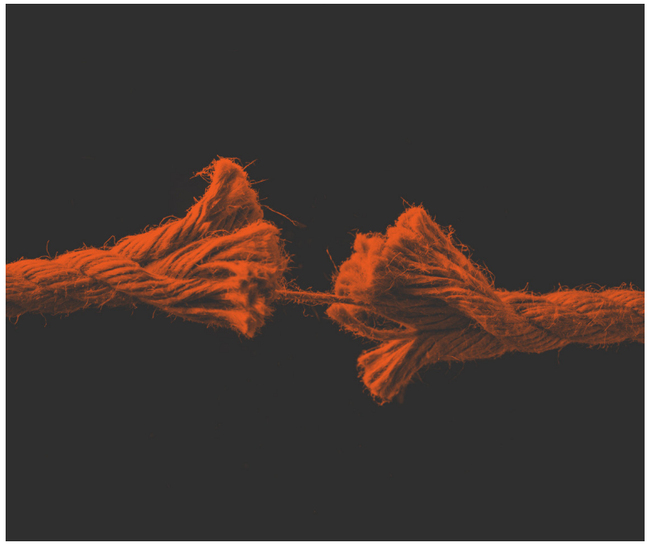
The new system of workflow for sales.

"Today's leading companies deserve more than a world in which their sellers fill out forms on top of databases; designed for a different era, these legacy systems don't really belong in the new world of conversational AI."

Chuck Ganapathi
Founder & CEO

Tact.ai is on a mission to remove friction from Sales. Tact.ai's Conversational AI platform is used by General Electric, Cisco Systems, ABB and other Fortune 500 companies to augment the daily seller experience in the field, maximize the value of their CRM investment and transform their sales organizations. Based in Redwood City, CA., Tact.ai Technologies, Inc. is a privately-held company backed by Accel Partners, Redpoint Ventures, Upfront Ventures, M12 (formerly Microsoft Ventures), Comcast Ventures, Salesforce Ventures, and the Alexa Fund.

Friction is the Biggest Enemy of Revenue Growth.



> The Laws Of Physics Apply to Revenue, Too: Friction is sapping your sales team and customer growth.

Of all the business functions that drive revenue, Sales leads the charge. Sales is a frontier function that translates products into revenue and generates value for customers. Sales leaders and reps have embraced new technologies faster and farther than other business functions. For e.g. CRM (Customer Relationship Management) remains the fastest growing category of enterprise software and is projected to be $70B by 2021. Despite these investments, friction has only grown in the sales cycle, sapping both sellers and customers.

Fully **64%** of all rep time is not spent on selling activities.

That's 2 of every 3 minutes.

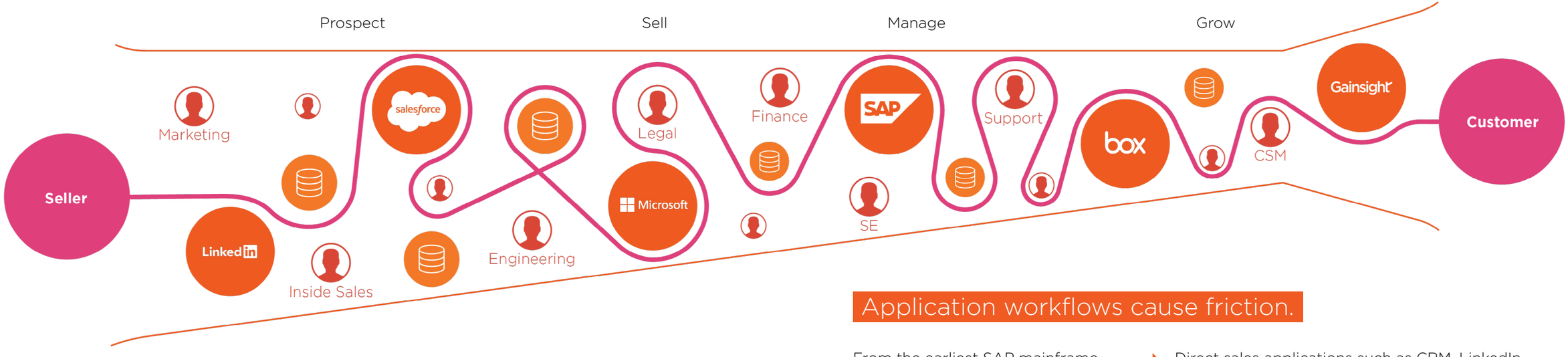
Technologies like CRM, a near **$50B** industry, have ~ **15%** adoption rates.

That's 1 of every 8 users of CRM.

Sellers wrangle with more buyer groups than ever before: e.g. Leaders, Operations, Procurement, IT, Legal, Users.

That's 3–4 stakeholders on average.

Both in our own research with thousands of sales leaders and reps as well as research conducted by CSO Insights and Salesforce, Friction has been identified as a key barrier to sales transformation. Instead of spending time in front of customers, sellers are spending inordinate time on non value-added activities, such as logging activities, pulling from CRM and multiple legacy systems, inordinate meetings, and wrangling people to move business forward. This friction directly affects sales cycles and win rates.



Silos cause lost revenue and customer friction.

The Revenue Cycle was first sketched in 1898 by a New Yorker in a bar [WIKIPEDIA]. Though the cycle has gotten longer and embraced more technologies, even today every rep seeks to prioritize time in front of a customer, not behind a computer. What started off as well-meaning technology interventions to drive productivity have often become inscrutable silos.

> "Reps aren't going to live in CRM anymore. That ship has sailed"
>
> Gartner

Application workflows cause friction.

From the earliest SAP mainframe applications to modern web CRM, even if the underlying technology changed from Power Builder to the cloud, enterprise applications essentially remain "Forms on a Database". These forms have increased exponentially in the era of super-specialized enterprise software, including:

- Direct sales applications such as CRM, LinkedIn
- Daily productivity applications such as email & calendar
- Customer success and customer data applications
- Marketing, procurement, order management, and other supporting systems

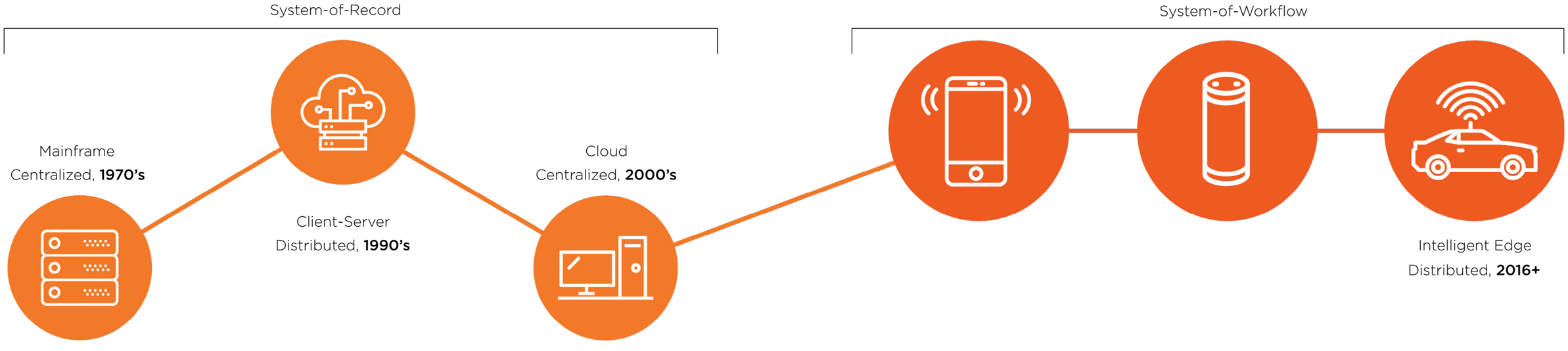
People silos amplify friction.

As enterprise software has become super-specialized, so have the roles that support Sales and customer management. Sales teams now have to grapple with more roles than ever before as they proceed from prospecting to closing to growth. These roles have increased in complexity and sophistication and have their own specialized tools including:

- Direct supporting sales roles e.g. Solutions and Sales Engineering
- Customer Success and Professional Services
- Content Marketing, Corporate Marketing, Field Marketing
- Approval roles such as Procurement and Legal

Why should
work feel like
the FLINTSTONES

when home
feels like
the Jetsons



Past computing approaches have held us back at work

Since the earliest mainframes that would require construction crews to install and dozens of teams to maintain, we have come a long way in computing. However, while the experience of buying software has dramatically changed from the mainframe era to the cloud era of the past two decades, the end user experience for sellers has largely remained the same.

Fundamentally, with traditional enterprise software like CRM, sellers do the heavy lifting. They have the burden of populating updates in CRM and can't seem to update CRM fast enough for business leaders to have a real-time accurate view of forecasts and revenue. No wonder sellers compare software at work with the Jetsons and software at home with the Flintstones.

But the Future of Work is fluid and conversational

What does it mean to work like the Jetsons? It means a new world where technology adapts to people and their daily workflow versus the other way around. The reason smartphones like the iPhone and voice assistants like Amazon Alexa have deeply impacted our lives is that these technologies amplify us while keeping us in the flow. We can order Uber with a swipe, use Apple or Android Pay with a tap, and listen to any song with a few commands.

This means there is a unique opportunity for enterprise workplace technology to take over our administrative and repetitive tasks, and so that we can focus on being more creative and productive at work and make more business impact. What if every sales person and sales team in the world had the same technologies at work as the Jetsons do at home?

Used to be...

We had to print out pages from MapQuest to get directions to anywhere.

What if...

Every seller could be pushed just in time insights and actions to take with a customer the way Waze pushes them directions?

Used to be...

We had to look up WebMD and trawl through pages to learn about ailments.

What if...

Every seller could work from wherever they need and get insights instantly, the way they tap Apple Watch health notifications?

Used to be...

We had to open a browser and navigate painful menus to get a bank's 1-800 number.

What if...

Every seller could naturally interact with customer data in the same way they interact with Amazon Alexa?

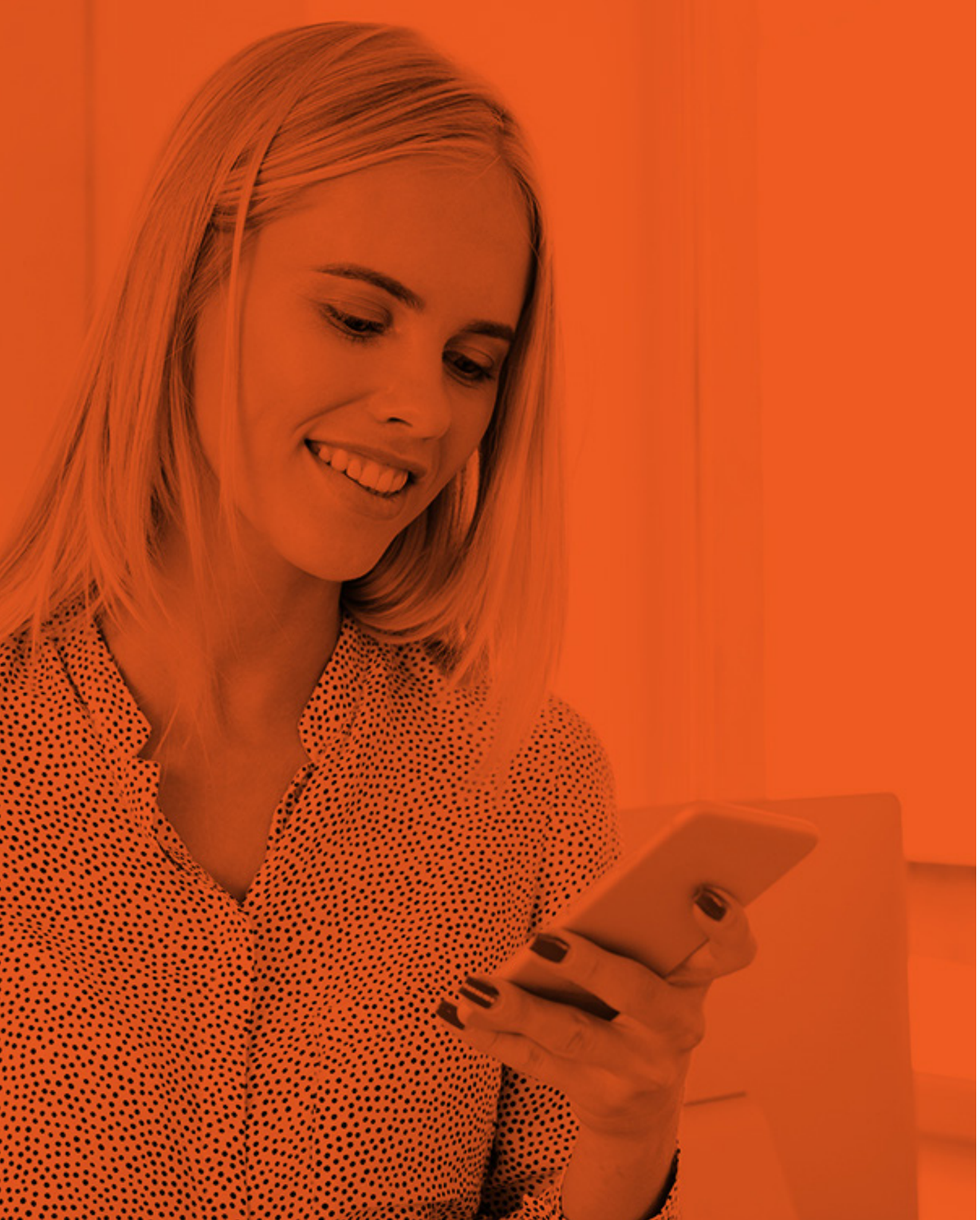
Used to be...

We had the same TV channels, limited programming, and dumb TV guides.

What if...

Every seller could get a unique personalized experience just right for their context they way they do with Netflix?

What if you could give every seller a personal assistant & a deal room

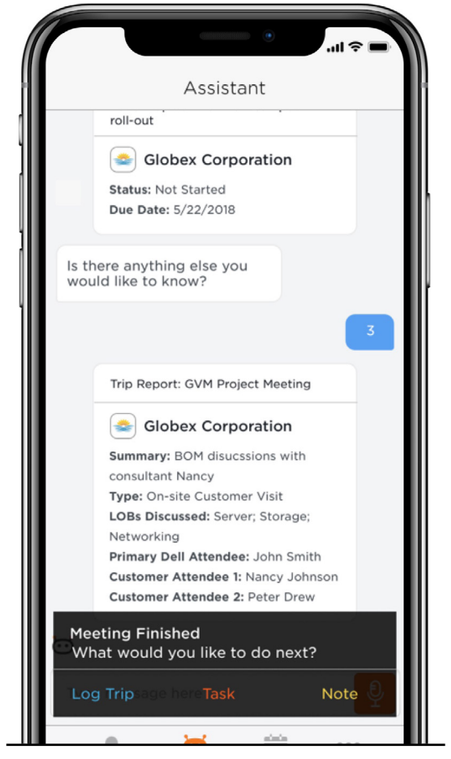


What if every seller in the world had a personal assistant?

The Tact.ai Assistant equips every seller to accelerate their customer flow through a human-friendly touch, text, and voice experience. It replaces the need to go to separate apps, automates manual data entry, and taps sellers on the shoulder with the right intelligence in context at the right time. Tact.ai eliminates wasted time and enables reps to be top performers using the power of AI.

> "Tact has a massive impact on work flow, selling execution, and ultimately success"

Brian McCarthy, Cisco

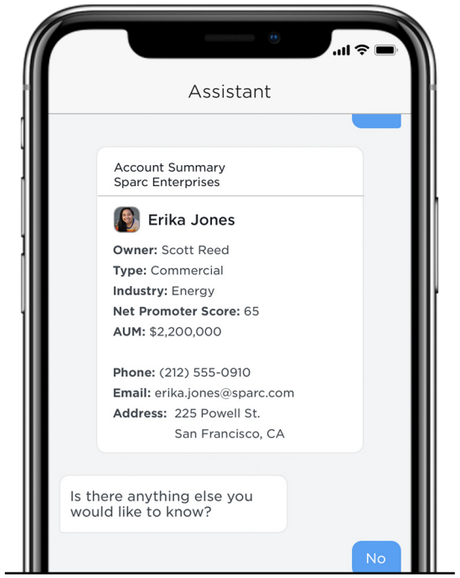


Human-friendly AI assistance

The Assistant initiates and engages in natural language conversations, provides intelligent insights just before customer interactions, and logs activities to CRM (e.g. calls or meetings). It seamlessly adapts to the natural cadence of sellers, enabling them to stay in their daily flow for maximum productivity.

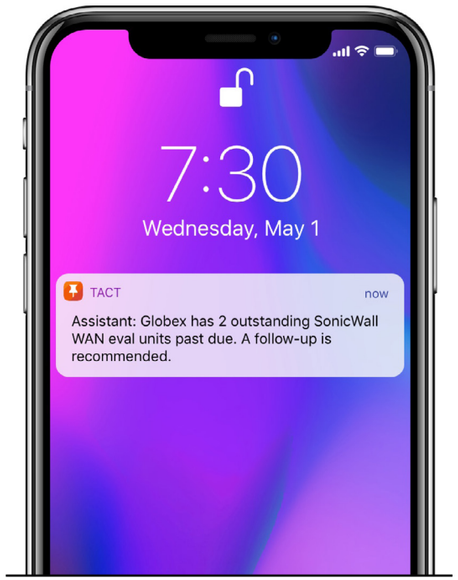
True 360° insights across systems

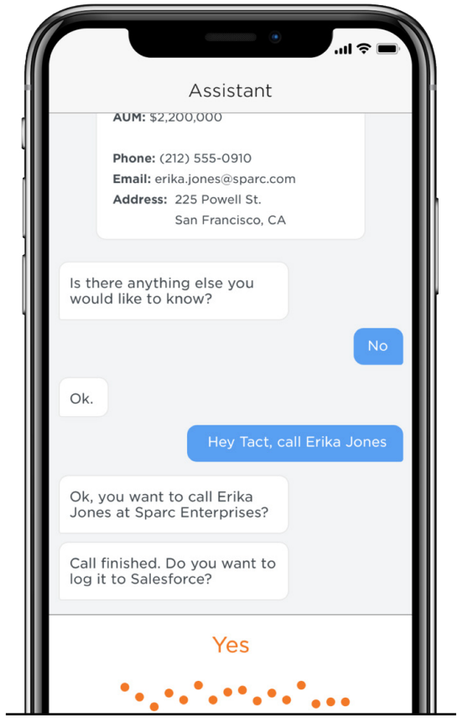
The Assistant provides an integrated customer view by bringing together data across Contacts, Accounts, Opportunities, Email, Calendar, LinkedIn, and other sales and marketing databases. It also works 100% offline. With Tact's patented sync architecture, users can update contacts or opportunities even without cellular connection or WiFi.



Contextual push intelligence

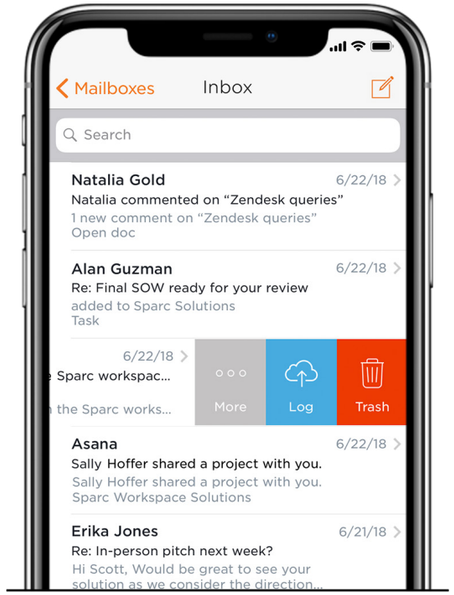
The Assistant pushes contextual insights to sellers and other members of the deal team. This includes changes in Accounts (such as key contact attrition or drop in customer health score) or changes in the market (such as key competitor moves). Insights can be pushed before or after meetings or other event triggers.





Conversational voice intelligence

The Assistant goes beyond traditional commands to bring a natural conversational voice experience for sellers. It adapts to seller's context to provide a seamless voice experience on mobile, in-car, and other edge devices including the Amazon Alexa and Microsoft Cortana.

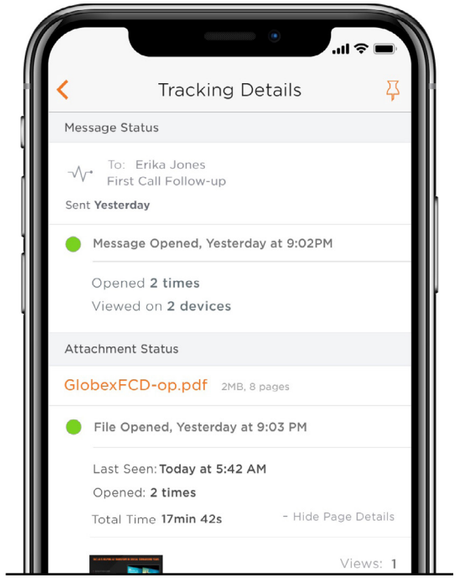


Fully integrated inbox experience

The Assistant brings salespeople a rich inbox experience with a Priority Inbox that automatically prioritizes emails from high-value prospects. It also enables 1-tap logging to CRM, quick Contact and Account creation, follow up tasks, and note addition.

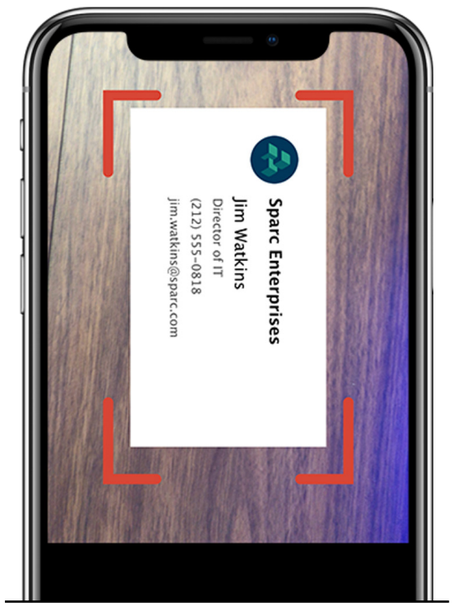
Content engagement tracking

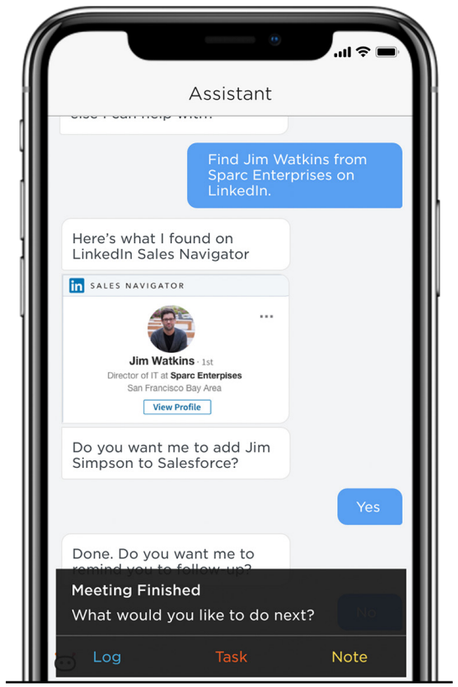
The Assistant helps salespeople engage better with customers and prospects through robust content tracking capabilities, providing notifications when emails are viewed, as well as page level insights for attachments such as collateral, close plans, and proposals.



Business card scanning

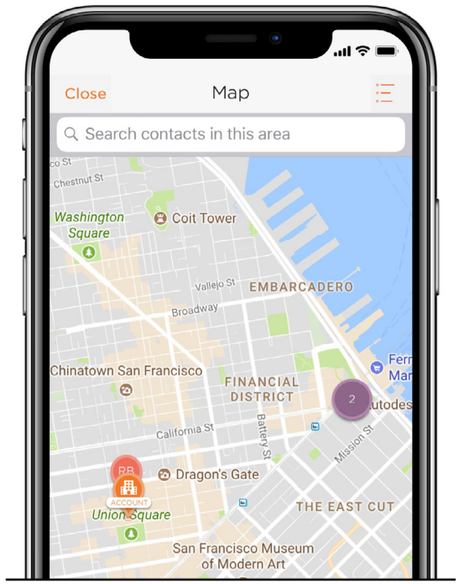
The Assistant uses the same advanced OCR technology that banks use to take photos of business cards and instantly convert them into new contacts in CRM with all fields automatically captured. The Assistant also deduplicates contacts.





Golden 5 minutes activity logging

The Assistant logs sales activities including calls, meetings, and emails to CRM systems immediately after an activity is completed, along with notes and action items. This post-activity logging in the “Golden 5 minutes” ensures only the freshest data is captured into CRM.

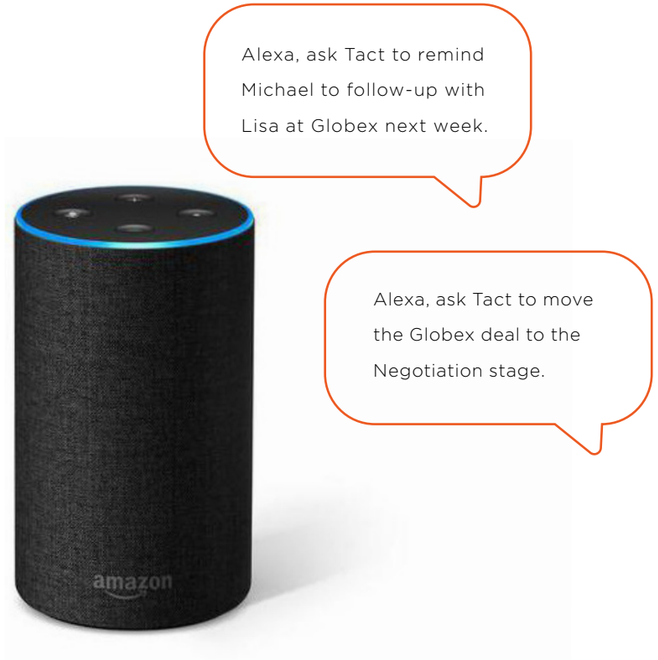


Location intelligence and route planning

The Assistant provides sellers visibility to nearby customers including Leads, Opportunities, and Custom Objects. It includes a visual territory map and access to location services, enabling sellers to get the most of their time in the field through follow-ups and meetings.

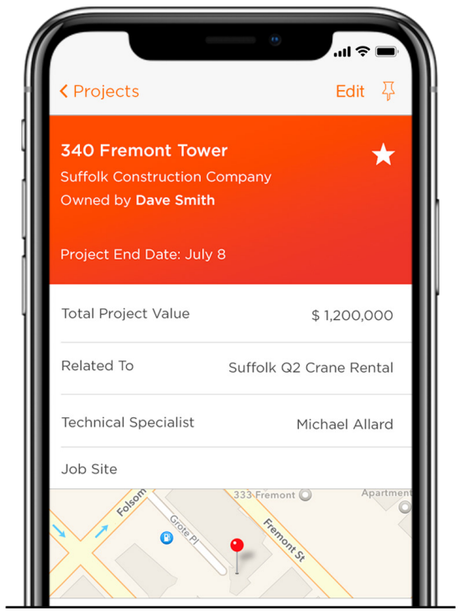
Alexa for Business integration

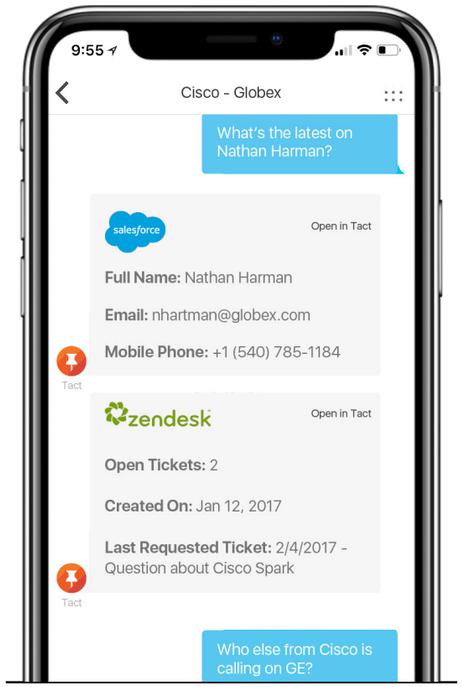
The Assistant also includes out of the box integrations with voice platforms such as Amazon Alexa for Business. Sellers can access the Tact.ai Assistant in conference rooms, offices, and even Alexa at home to have multi-step, natural language conversations with CRM.



CRM updates to custom objects

The Assistant supports conversational and mobile updates to both standard and custom Salesforce objects. It can extend to existing objects such as Opportunities as well as new ones for e.g. Trip Reports, Locations, or Projects.





External workspace integrations

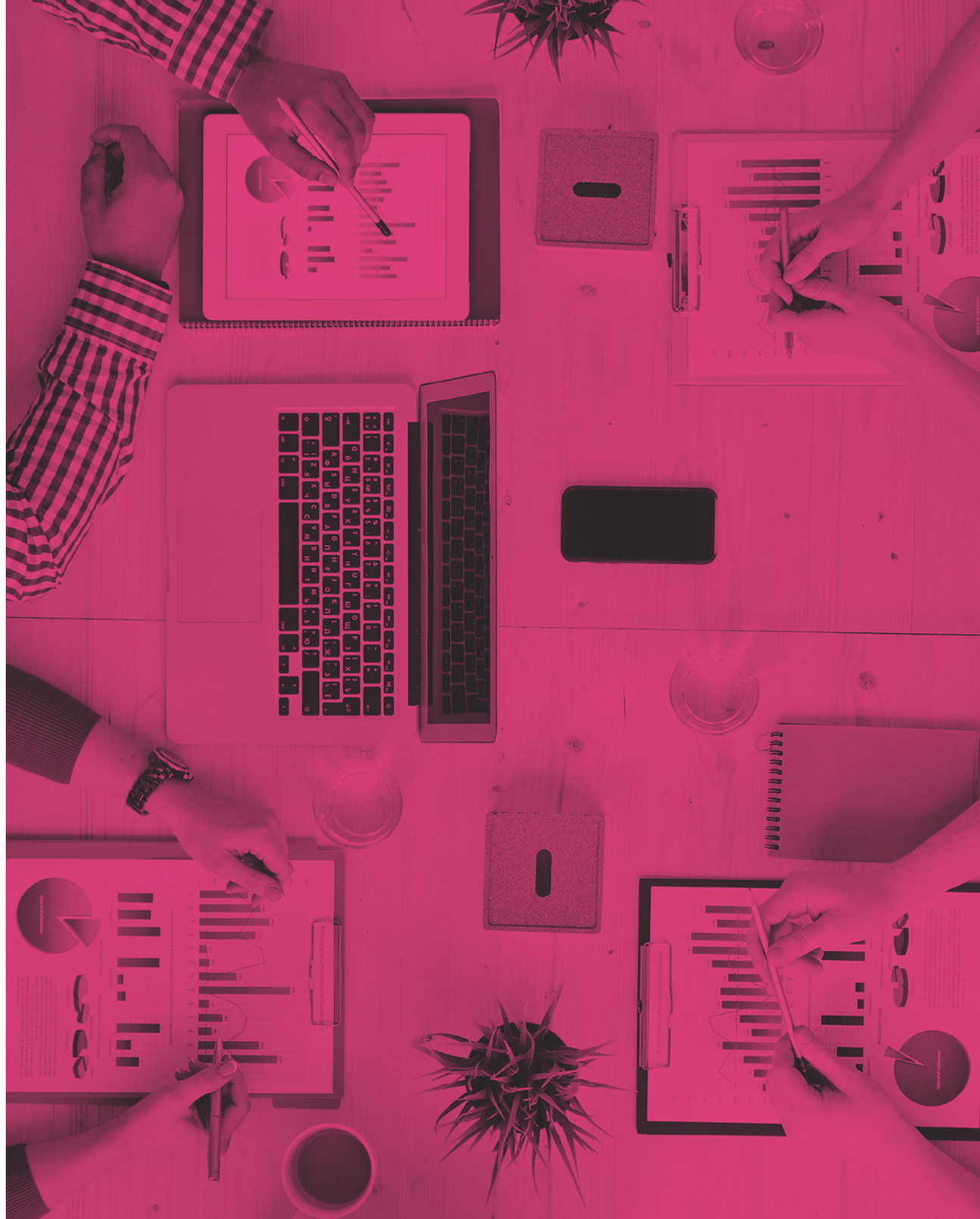
In addition to existing as an embedded capability in the Tact.ai Workspace, the Assistant can also be integrated to work with 3rd party workspaces such as Cisco WebEx Teams or Microsoft Teams.

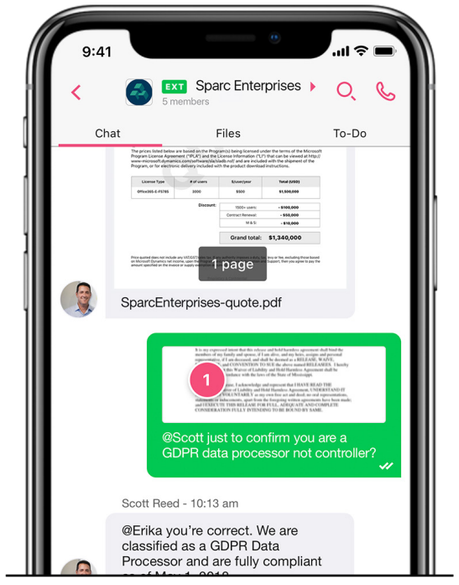
What if every seller in the world had a war room for every customer?

The Tact.ai Workspace creates deal rooms controlled by the seller to get things done with their deal team and the customer — minus the endless meetings, calls, and emails. The Workspace brings together all the tools sellers need to collaborate and grow revenue faster and serve customers better. It compresses hierarchies and accelerates sales cycles.

> "I can spend more time in front of customers and work faster with my deal team."

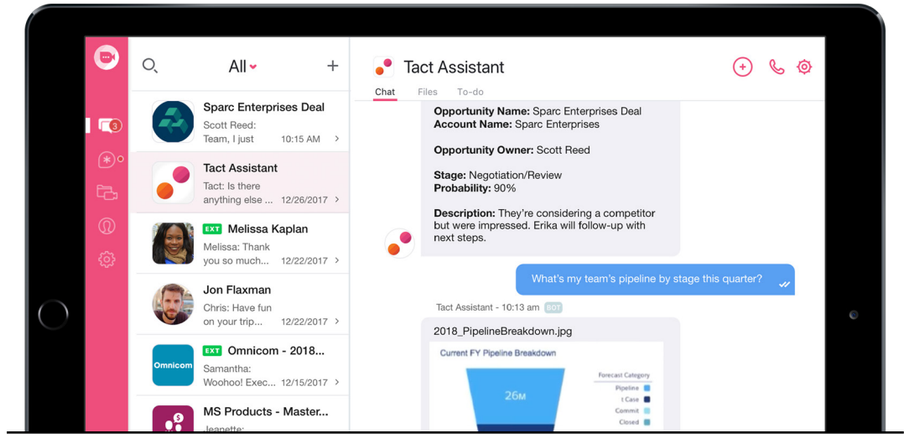
Nunzio Peleggi, GE





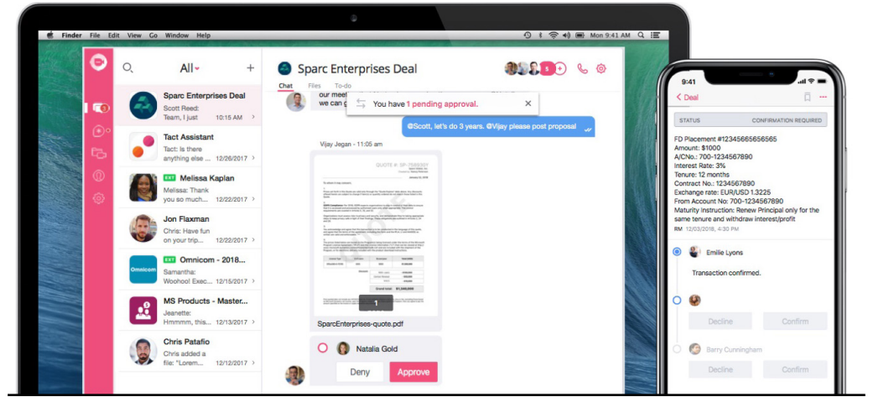
Personalized deal rooms

The Workspace provides personalized deal rooms for customers and partners, as well as internal teams. It enables Sales to collapse internal boundaries (e.g. with Marketing, Customer Success, Procurement, Legal) to align around customers and bring the right people together through persistent and secure messaging.



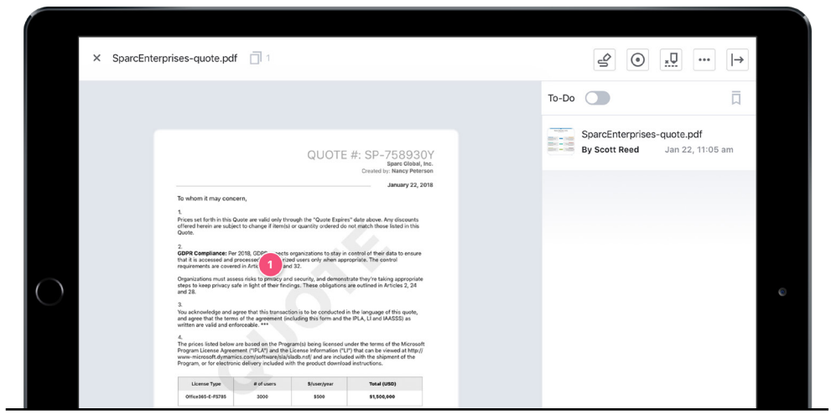
AI assistance an @mention away

The Workspace includes the Tact.ai Assistant embedded as an extended team member. The Assistant can be invoked simply with an @ to receive and provide conversational updates to CRM and other sales tools, as well as other systems such as Content, Support, Marketing, or Service data repositories.



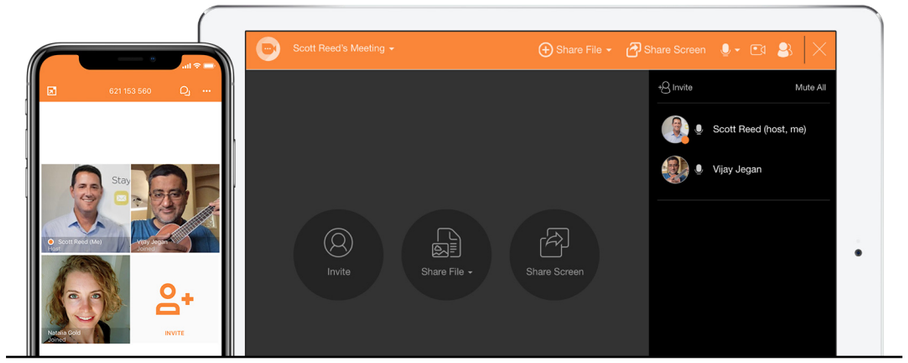
Rapid cross-org approval workflows

The Workspace removes bottlenecks that slow down the revenue cycle, from content and eve nt approvals with marketing to legal and procurement proposal approvals. Users can easily get the approvals they need to keep moving deals quickly in the flow through conversational interactions.



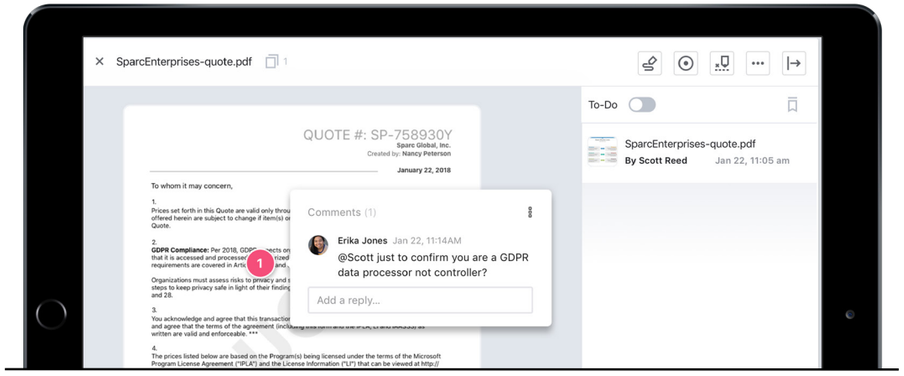
Secure and integrated e-signatures

The Workspace also comes with powerful e-signature and form-fill capabilities within secure channels, to complete transaction workflows. This allows customers, partners, and sellers to close binding transactions without leaving the deal room, while retaining a full transaction history.



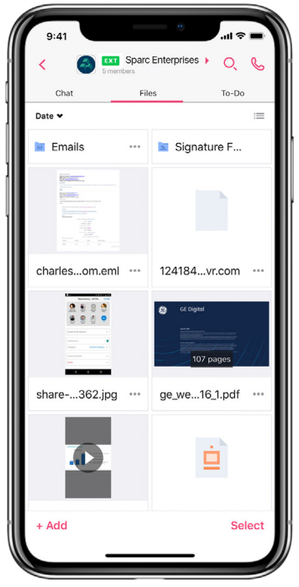
Live meetings to expedite communication

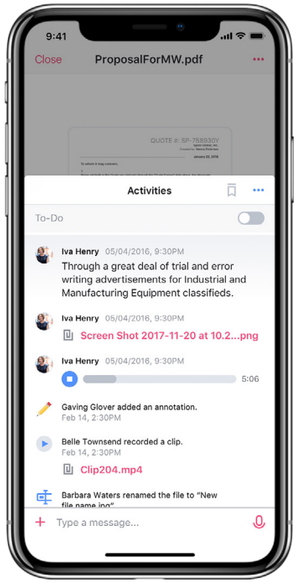
The Workspace helps sellers escalate from secure chat to live real-time meetings with the tap of a button. It includes audio, video, and screen sharing, using which sellers can invoke the right knowledge resources to close deals faster and serve customers better while staying in the flow.



Extensive document collaboration capabilities

The Workspace equips teams to iterate and finalize content from within the deal room. Sellers can markup proposals through visual spot commenting, drawing, and voice annotations, eliminating the frustration of countless back and forth emails and multiple document versions.



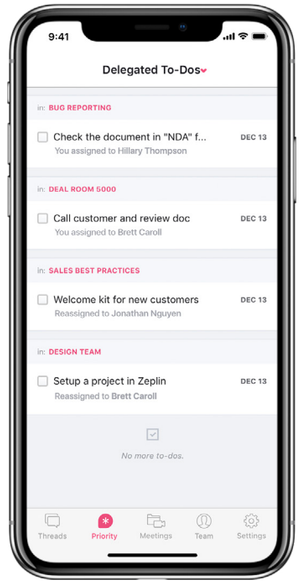


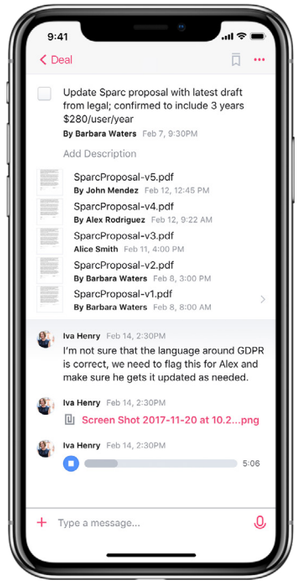
Integrated file storage and instant sharing

The Workspace enables Sales teams to upload and share files quickly with rich preview and commenting capability. Teams can create clips on files, do free form whiteboarding, and store all meeting recordings for knowledge transfer and compliance.

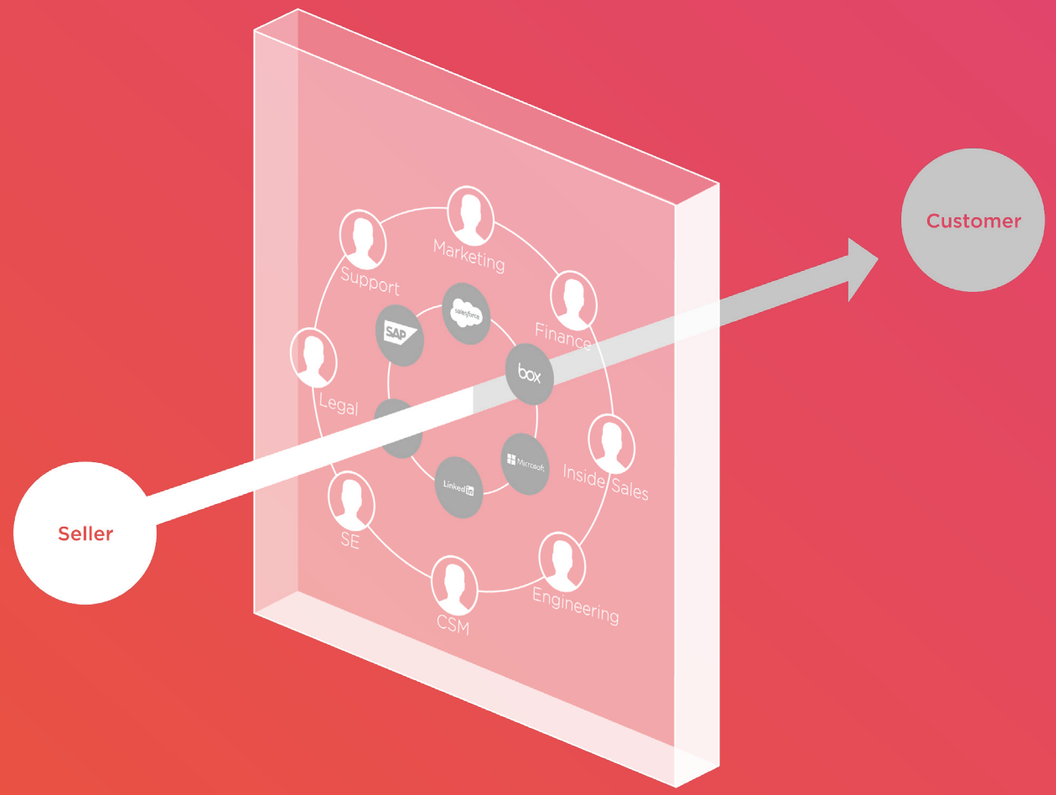
Seamless shared task management

The Workspace turns chat messages into action items with To-Dos.
It drives deal team coordination through a shared view of tasks and integrated task managemenat.
Sellers can assign and track both group tasks or one-on-one tasks.

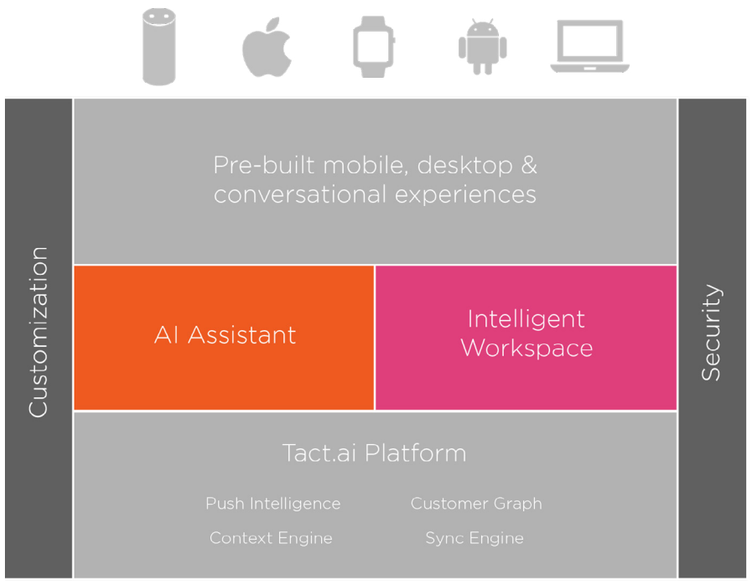




Tact.ai delivers the new system of workflow



A new kind of sales platform for the intelligent edge.

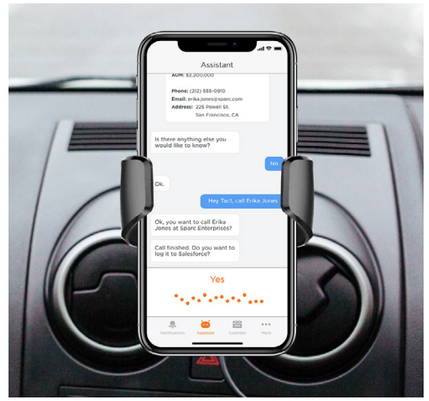


At Tact.ai, we have designed a new kind of Conversational AI platform. Keeping sales leaders and reps at the center, the Tact.ai platform connects with CRM and all the data sources salespeople need and provides contextual Push Intelligence to sellers.

Our AI Assistant and Intelligent Workspace are available out of the box through voice, mobile, and desktop experiences.

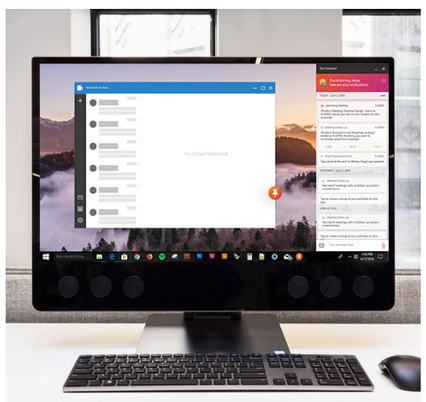
Mobile

Work from anywhere with the Tact mobile experience, that provides an embedded AI Assistant, integrated email and calendar, tasks, and deal and opportunity management.



Voice

Run your business from the car with Tact in-car voice intelligence that empowers sellers to conversationally engage with CRM and other customer data systems.



Desktop

Stay in the flow while in the office with the Tact desktop experience, that provides AI assistance across email, desktop sales apps and other productivity apps.

Enterprise grade security

The Assistant is designed with strong data retention and isolation policies. It has its own single tenant database in a multi-tenant environment. It also uses Amazon's Key Management Service ("Bring Your Own Key") enabling IT administrators to have a unique encryption key per tenant. Additionally, the Assistant supports Single Sign-On.

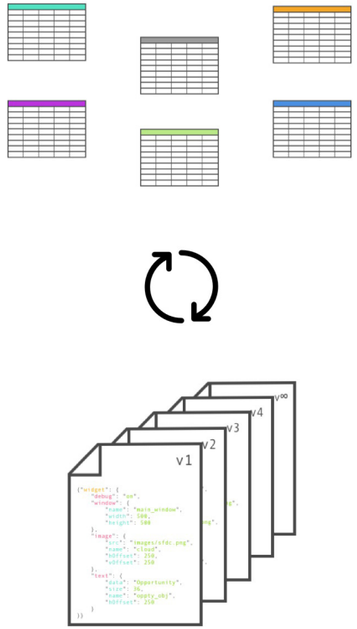
Amazon Web Service, KMS

Compliance and certifications

The Assistant was built with the most updated enterprise-grade compliance certifications including GDPR, ISO 27001, PCI, and the Cloud Security Alliance. Additionally, the Assistant has a 90-day data retention policy and rigorously tested in-house and with 3rd party penetration testing.

Patented sync architecture and customization support

Tact.ai has a patented architecture to support user-specific syncing with a generic connector framework. The Assistant automatically syncs CRM metadata including object, field, and layout definitions and validation rules. Tact.ai also supports org-specific relevancy rules with metadata overrides.



Mobile device management integrations

The Assistant integrates with Mobile Device Management (MDM) systems such as MobileIron and AirWatch allowing IT administrators to do remote wipe, provisioning, de-provisioning, and device and application management.

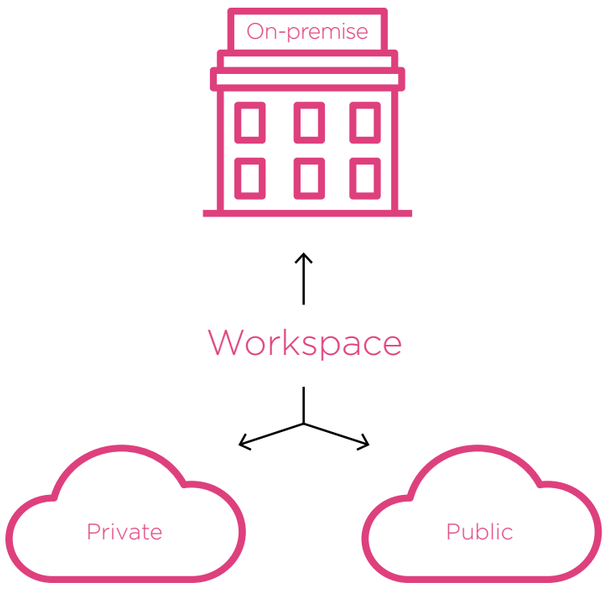
SOC 2 TYPE II CERTIFIED

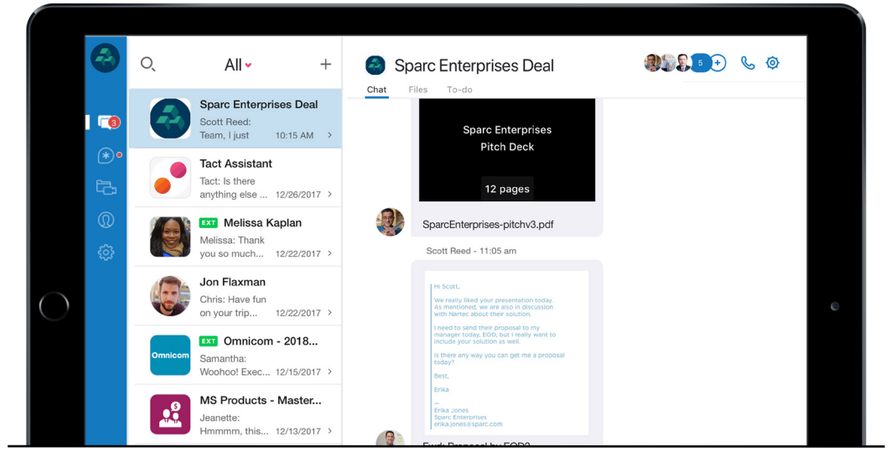
Enterprise grade security

The Workspace provides the highest level of data security and encryption. It is SOC 2 Type II compliant and has document level password protection (e.g. PDFs). The Workspace is also GDPR compliant, and messages can be securely exported and archived for a full audit trail.

Flexible deployment options

The Workspace can be deployed on public cloud services, private cloud instances, as well as on-premise, which makes it easy to deploy in extra security conscious environments.





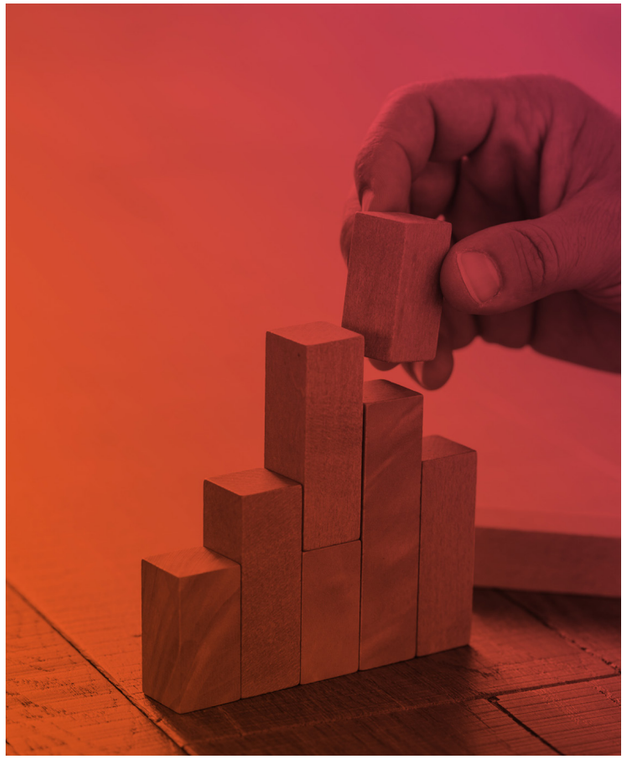
White labeled customization

The Workspace user interface supports custom visual branding. The Administration Console provides extensive customization capabilities including for colors, typography, and other visual experience elements.

Out-of-the-box integrations

The Workspace also includes out of the box integrations with sales and marketing systems (e.g. Salesforce, Zendesk, HubSpot) as well as other workplace tools. The integrations are bi-directional between specific threads and external systems.

Why do sellers love Tact.ai.



General Electric, Cisco Systems, ABB and other Fortune 500 companies are augmenting the daily seller experience in the field, maximizing the value of their CRM investment and transforming their sales organizations with Tact.ai.

> "AI is no longer about how your company does things – it's who you are"

accenture

Sellers do more with less.

"Sales software wasn't designed for today's environment, where sellers can no longer afford to get stuck shuffling between different apps looking for the right combination of data and insights.Tact.ai's ability to meet sellers within their daily workflow of activities delivers a frictionless, 360-degree experience when most needed – at the 'edge' of customer interactions.."

cisco

Cisco
Luca Felli, Digital Experience & Analytics Leader

Sales Leaders get more value from CRM.

"Building a shared understanding inside your company and with customers and partners while traveling can be difficult. Traditional office tools such as email and phone calls can be cumbersome. You need to be able to quickly review multiple data sets, identify problems, agree on modifications and coordinate with multiple departments to get deals done — all while on the go. Tact.ai's Voice Intelligence capabilities deliver this type of experience better than most."

Panasonic

Panasonic Aviation Corporation
Cate Gutowski, SVP, Global Sales and Service

"Tact makes it easy to access customer data and submit Trip Reports on the fly, so you can maximize your day."

- **Tina P**, Dell EMC

Cisco
Brian McCarthy, Account Manager

"Tact will have a massive impact on work flow, selling execution, and ultimately success for me."

Box
Julianne GSell, Account Executive

"Would be great for in person meetings. It really is what SFDC should be on mobile."

"Reminders are wonderful and the Virtual Assistant guides logging meeting notes and actions."

- **Tony Jacobs**, ABB

Groom Energy
Nick Balster, VP

"Tact gave my team 32% more wins and 238% increase in pipeline. They got 10X faster with Salesforce activities without wasting evenings."

"Was struggling to keep the teams aligned and informed but now with Tact.ai it is helping me to do this by creating the One True North."

- **Matt Deyo**, GE Healthcare

AstraZeneca
James Wake, IS Architect

"Thread is great, it is like Slack, Webex, Skype all rolled in one. Can be used for remote rep calls with HCPs"

"With Tact, salesforce.com becomes a real CRM that I can use everyday."

- **Laura Volpi**, Cisco

Tasc
Heidi Otto, Regional Sales Director

"I don't spend 2 hours in SFDC daily; I make appointments and do things that will bring us business down the road."

Kelly Services
Brad Sibbald, Sales Director

"We saw a 25-30% increase in daily documentation. Tact helped us get into larger accounts and increase revenue"

Our Customers

GE · box · Cisco · Honeywell · Dignity Health · AES · DELL EMC · Kelly Services

Our Investors

ACCEL Partners · Redpoint · upfront Ventures · Comcast Ventures · amazon · Microsoft · salesforce ventures

Our Mentions

"What's so special about Tact.ai? Two words: voice recognition."

Forbes

"Using Tact quickly can raise the likelihood of salespeople putting data into apps like Salesforce."

WSJ

"Perfect storm of AI and edge computing to help sales"

Bloomberg

Our Awards

Gartner 2017 Cool Vendor · Constellation ShortList · Ventana Research 2017 Digital Innovation Award Winner · The Stevies

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