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How AI is Reshaping Strategic Deal Management

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Introduction

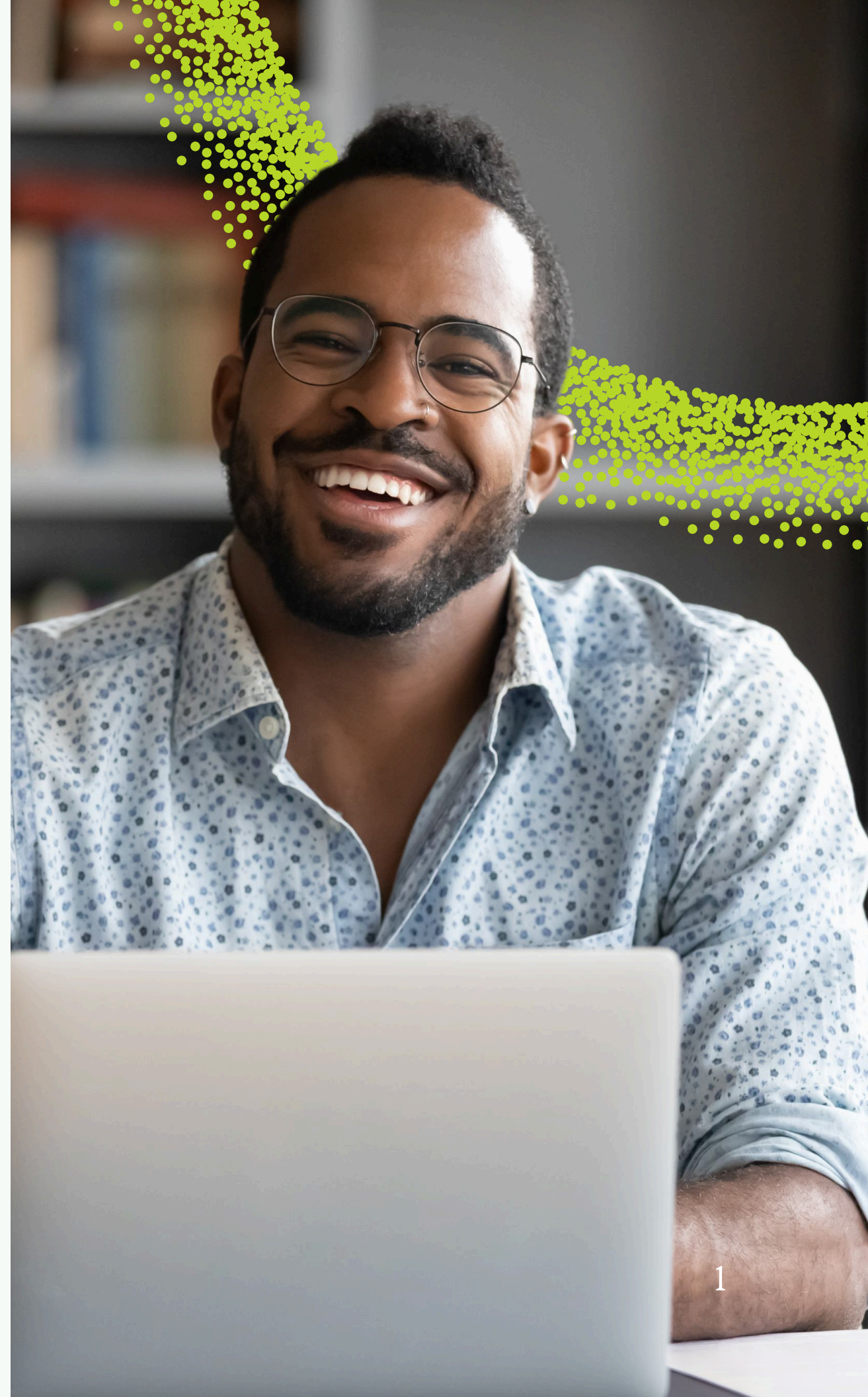
Every great sales leader remembers a deal they almost lost...until something clicked at the last minute.

Maybe it was an unexpected insight, a shift in buyer behavior, or a key decision-maker finally coming around.

Now imagine having that kind of “aha moment” in every deal, while you’re still in control.

Agentic AI is giving sales leaders that clarity. It transforms deal management from reactive to proactive, helping you spot risk, prioritize the right deals, and improve the way deals are managed and closed. With AI agents, you can focus less on firefighting and more on consistently moving the needle with targeted outcomes.

This guide will walk you through the reasons why agentic AI is a boon for today’s complex deal cycles.



Agentic AI Turns your Gut Instinct into Data-backed Confidence

Sales leaders have always been resourceful, using whatever tools they had to make sense of complex data and manage deals. But these makeshift solutions — patching together spreadsheets, CRMs, and intuition — they can only take you so far.

Even the most sophisticated systems often fall short, leaving gaps in understanding and strategy, and surfacing insights too late to make a difference. The good news? With agentic AI, we now have the ability to close those gaps and transform deal management into a proactive, outcome-driven process.

Without agentic AI, many organizations face challenges like:

Strategic deficit

Without advanced AI tools, leaders can't get a clear understanding of deal health, potential risks, or broader sales trends based on all the relevant data. This creates blind spots, leading to missed opportunities or misallocated resources.

Poor prioritization

It's difficult to know where to focus your team's efforts when you don't have reliable data. Without clear prioritization, the team risks chasing low-value deals while high-potential ones slip through the cracks.

Ineffective risk detection

Spotting risks early in the sales cycle is tough without agentic AI drawing insights from across your organization's data in real time. Early detection is key, but traditional methods rarely catch red flags in time.

Ultimately, relying on makeshift analysis won't solve these challenges. Volume, noise, and data overload demand a more sophisticated solution. The future lies in AI, which empowers leaders and their teams to reimagine deal management. For example, Salesloft's AI agents detect risk signals early by analyzing calls, CRM updates, and engagement trends across every deal, so your sellers can take the right action at the right time.

AI agents help you:



Make sense of the noise



Identify invisible patterns



Better direct sales resources

Salesloft's AI agents drive up deal quality, surface risks before they turn into closed-lost opportunities, and keep revenue flowing with continuous prioritization and insight delivery.

Here's how you make it happen.

Where Does AI Come in?

The magic happens in revenue generation when you combine the unique strengths of go-to-market professionals with the precision and speed of agentic AI. AI agents don't replace humans; they help sellers take advantage of the available data and confidently make decisions.

“People are scared AI is taking their jobs. It’s the opposite with Salesloft. It’s like improving your job and freeing you up to do more meaningful work.”

Kaycee Decker
Sales Ops Analyst at Wrike

In the context of sales management, a good automation litmus test is to ask yourself, “What are our reps uniquely good at?”

Sellers excel when they can stretch their creative muscles, build innovative strategies, or employ lateral thinking. Those tasks drive deals forward.

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That leaves a lot that humans aren't uniquely good at. Asking a seller to read through thousands of words of deal history is inefficient. Expecting them to identify trends across hours and hours of call recordings isn't much better. AI agents take on the heavy lifting: processing huge amounts of data, analyzing deal history, and identifying trends. These are important tasks, but handling them manually can slow sellers down. With agentic AI, this all happens in the background, giving your team the freedom to focus on the actions that drive meaningful outcomes.

“Humans see impenetrable call transcripts, deal notes, and buyer activity. But AI sees patterns like emerging risks, new opportunities, and next best actions.”



Bryan Hill
Product Management Manager
at Salesloft

By asking yourself, “What do our human reps excel at, and what can we automate?” you create a powerful framework for agentic AI implementation.

Where reps excel

Creative problem-solving

Navigating complex buyer needs, delivering tailored solutions that build trust and move deals forward.

Relationship-building

Establishing and nurturing meaningful, long-term connections with buyers that AI alone can't replicate.

Strategic decision-making

Adapting strategies to complex scenarios and dynamic buyer behaviors, creating winning approaches.

Personalized selling

Crafting messages and interactions that deeply resonate with individual buyers, enhancing engagement and loyalty.

Negotiation and objection handling

Responding to buyer concerns with empathy and real-time adjustments to secure commitments.

Where AI agents can support

Data collection and aggregation

Automatically capturing buyer signals from emails, calls, and engagement activity to provide a complete view of every deal.

Uncovering patterns and insights

Analyzing vast amounts of data to reveal trends, risks, and opportunities that aren't immediately visible to humans.

Prioritizing high-impact deals

Surfacing the deals that are most likely to close and deserve immediate attention, saving sellers valuable time.

Forecasting deal outcomes

Using machine learning models to predict deal success and give leaders greater confidence in their sales forecasts.

Automating routine tasks

Handling administrative work like call logging, activity tracking, and deal progress updates, freeing sellers to focus on high-value activities.



Get started with Agentic AI in Deal Management

While every team is finding unique ways to use AI, there are five clear use cases where AI agents are making the biggest impact.

1 Turn noise into action

Most sales teams are hemmed in by data. “Point solution” tools (those are tools designed to solve specific problems) have created a cacophony of noise. Even the best sales teams can’t parse thousands or millions of data points to identify trends. But AI agents can. In fact, that’s what they’re best at.

“Salesloft was the only platform we found that allows us to have granular visibility of what's working at the variant or element level. We can determine what’s working and optimize so we do more of that.”



Derek Rey
Founder and CEO at Demand Inc

By consolidating buying signals from across your sales organization, you create a treasure trove of data. Salesloft’s AI agents can analyze that data and use behavioral, intent, and firmographic patterns to trigger next best actions.



What this looks like in Salesloft Command Center

- **Command Center** *Consolidate data from across your organization.*

Tear down data silos and consolidate signals from your entire sales process — from prospecting to closing — in one place.

- **Data to dive deeper** *The more you know about your buyers, the stronger your predictions.*

As your Command Center gathers more information, it gets smarter. It learns what's working and what's not.

- **Insights, actions, and outcomes** *Lead your teams to the next best actions.*

Turn noise into concrete actions for your sellers. Track the outcome to learn what's successful and what needs to change.



2 Find the sellers who need help — fast

If you wait for a sales rep to ask for help, chances are it's too late. The deal's lost. Instead, use AI to identify leading indicators of deal health. Salesloft's Rhythm Priority Account agent uses a Deal Engagement Score to flag early indicators of stalled or off-track deals and prioritize seller actions before deals fail.

“We are so much further along because we are able to coach and improve at earlier stages than we were previously. We knew reps weren’t growing the pipeline, but now we know what stage they are getting stuck in.”



Chris Sidor

Former VP of Sales at
ORIGO Education

Once you know what deals really need your support, you can focus on high-impact interventions.

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Contract Follow-up for Marcus Johnson

"6 Sides Quote v2" viewed 3 times

Video Follow-up with Bob Brandishier

50% of "Product Walkthrough" viewed

Send Agenda to Guy Hawkins

Meeting on Jul 22, 2023 at 11:00 AM

Meeting Follow-up for Wade Warren

Met on Jul 14 2023 at 5:00 PM

\$

ENT - New Deal - 6 Sides

6 Sides

\$800K

Jul 28, 2023

Proposal

88

Opportunity Priority for

Emerging - New Deal - Atilane

Key Factors

92

Deal Engagement Score

Jan 30

\$1M

Negotiating (76%)

Powered by ConductorAI.

Deal - Good Iron

\$500K

Jul 28, 2023

Developing

86

Deal - TreeQuote

\$200K

Aug 15, 2023

Negotiating

75

New Deal - Sumac

\$500K

July 31, 2023

Negotiating

66

What this looks like with Salesloft's Deal Engagement Score

→ **Deal Engagement Score** *Sort the sure things from the long shots.*

Aggregate 30+ stakeholder engagement and deal progression factors to get a health check on deals. Combine Deal Engagement Scores with the “fit” of each account to get a reliable win prediction.

→ **Analytical transparency** *See how Salesloft calculates your scores.*

Explore the factors most positively and negatively impacting engagement scores. Double down on your strengths and fix your weaknesses.



3 Spotlight the perfect next step

Every deal has multiple next-step options: an intro call, demo, presentation, legal review, proposal, and so on. Picking the right next step at the right time is what makes a great rep. Reps used to develop that skill with time, practice, and experience. But today AI agents can shortcut the process.

“AI transforms buying signals into insight. A Revenue Orchestration Platform turns that into action. And action is the only thing that can drive revenue.”

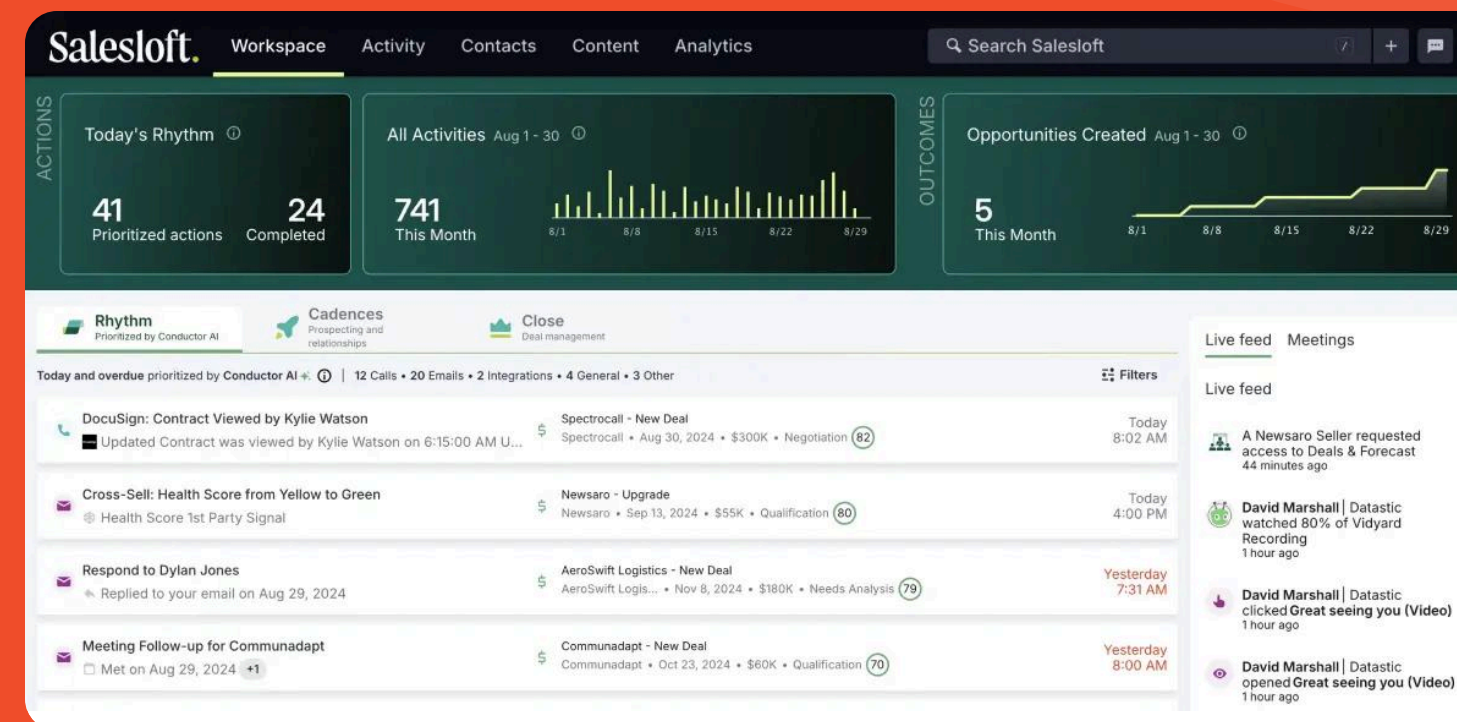


Ellie Fields

Chief Product and Engineering
Officer at Salesloft

Conductor AI evaluates seller activity, buyer engagement, and opportunity data to prioritize actions based on their likelihood of moving the needle. Sellers don't have to rely on guesswork or intuition. The next best action is always there waiting for them — meaning stronger deal engagement, faster deal progress, and progress towards growth targets.

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What this looks like with Salesloft's Conductor AI

→ **Conductor AI** *Analyze your past deals to uncover trends.*

Conductor AI learns what's working and adjusts accordingly.
No more performance plateaus — just continuous improvement.

→ **Full-cycle mindset** *Consider every action from prospecting to close.*

Engage with the right prospect at the right time to move a deal forward. Using Plays to ingest signals and Conductor AI to prioritize impactful actions, Rhythm helps your sellers make timely, relevant decisions.

→ **Rhythm Focus Zone** *The perfect next best action — every single time.*

Conductor AI ranks the success of open opportunity and prospecting activities and lists them in the rep's Rhythm Focus Zone. Make the greatest impact when time is limited by stringing together one next best action after another.



4 Keep an eye on every single deal

Old-school deal management suffered from piecemeal coverage. Reps would highlight a handful of deals during their weekly meetings. Managers would bump one or two up to sales leadership. It was like looking through a pinhole.

AI agents like Conversation Summaries, Conversation Key Moments, and Deal Summaries provide comprehensive visibility across the funnel. While you’re diving into the details of one deal, AI agents are continuously reviewing every other opportunity, evaluating rep performance, deal progress, and emerging risks.

“We have real-time visibility into how everything is going each day. It’s been a game-changer; helping us develop new growth strategies or experiment with approaches we might not have considered without the right tools in place.”

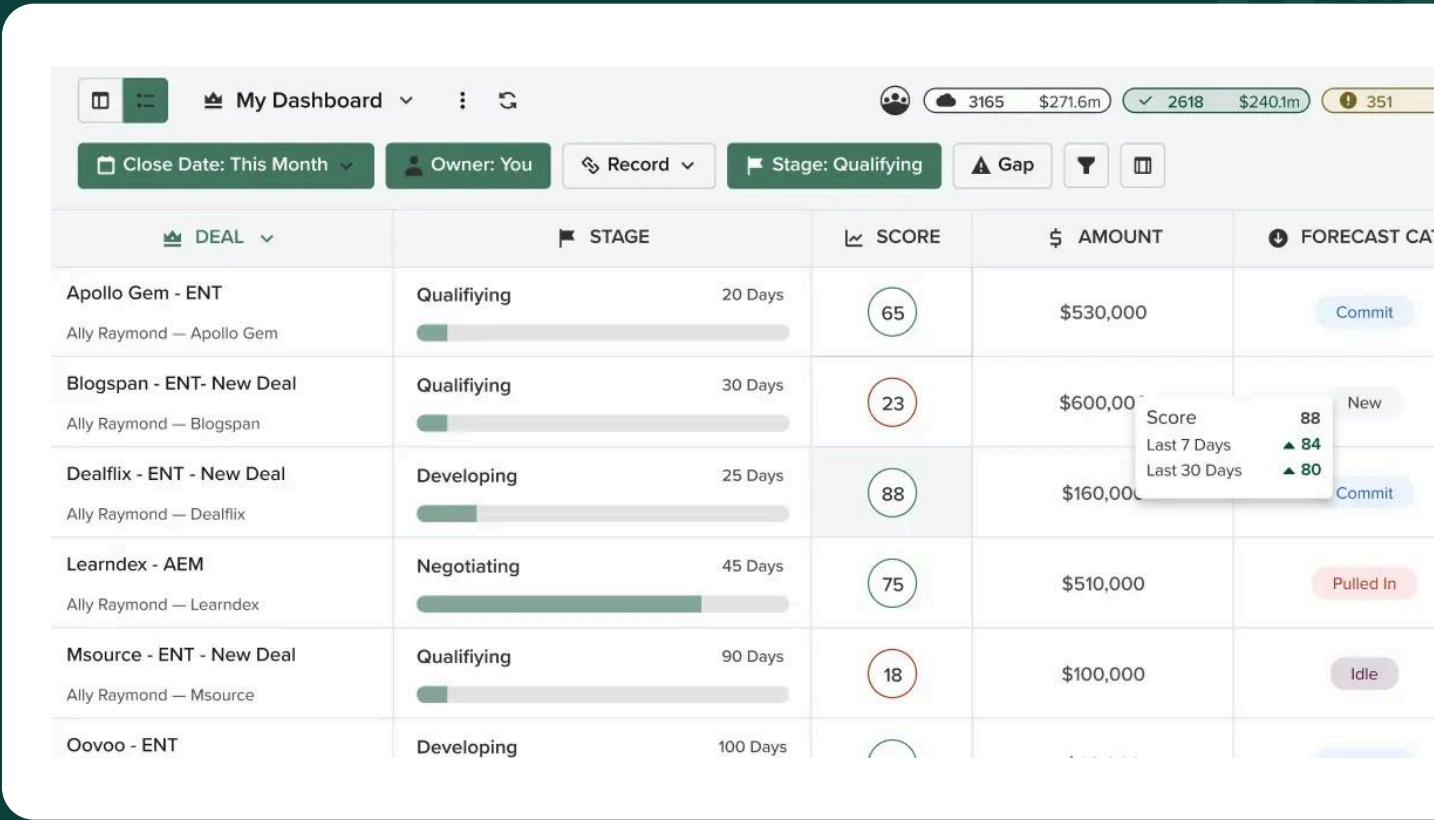


Denis Malkov

VP of Business Operations
at PandaDoc

For sales leaders, these agents deliver accurate high-level insights on every deal. No matter whether you’re overseeing a dozen deals or a thousand, you can see what’s ticking along nicely and what needs your help.

Instead of investing your time in one or two deals that happened to get brought up, you can narrow in on the interventions that move the needle.



What this looks like in Salesloft Deals

→ **Deals Review** *every single sales call – instantly.*

Analyze every interaction between buyer and seller. With 100% coverage, you can assess process execution and performance.

→ **Always-on coaching** *Have your reps' backs.*

Salesloft's agentic AI is like a co-pilot, riding along with reps as they work deals. By nudging them towards the next best actions, it turns every seller into an unstoppable closer.



5 Better see the future with reliable forecasts

Traditional forecasting doesn't work.

Human biases, poor data quality, and plain guesswork combine to throw off forecast accuracy. It's no surprise that 80% of sales organizations miss their forecasts by at least 10%. Without reliable forecasts, leaders can't plan for the months and years ahead. Are they capitalizing on strong growth or reacting to a poor quarter? It's an impossible task.

But the times are changing.

“With Salesloft, I'm able to tell if we need to grow the pipeline and whether we need to focus on the current pipeline or upsells and new opportunities.”

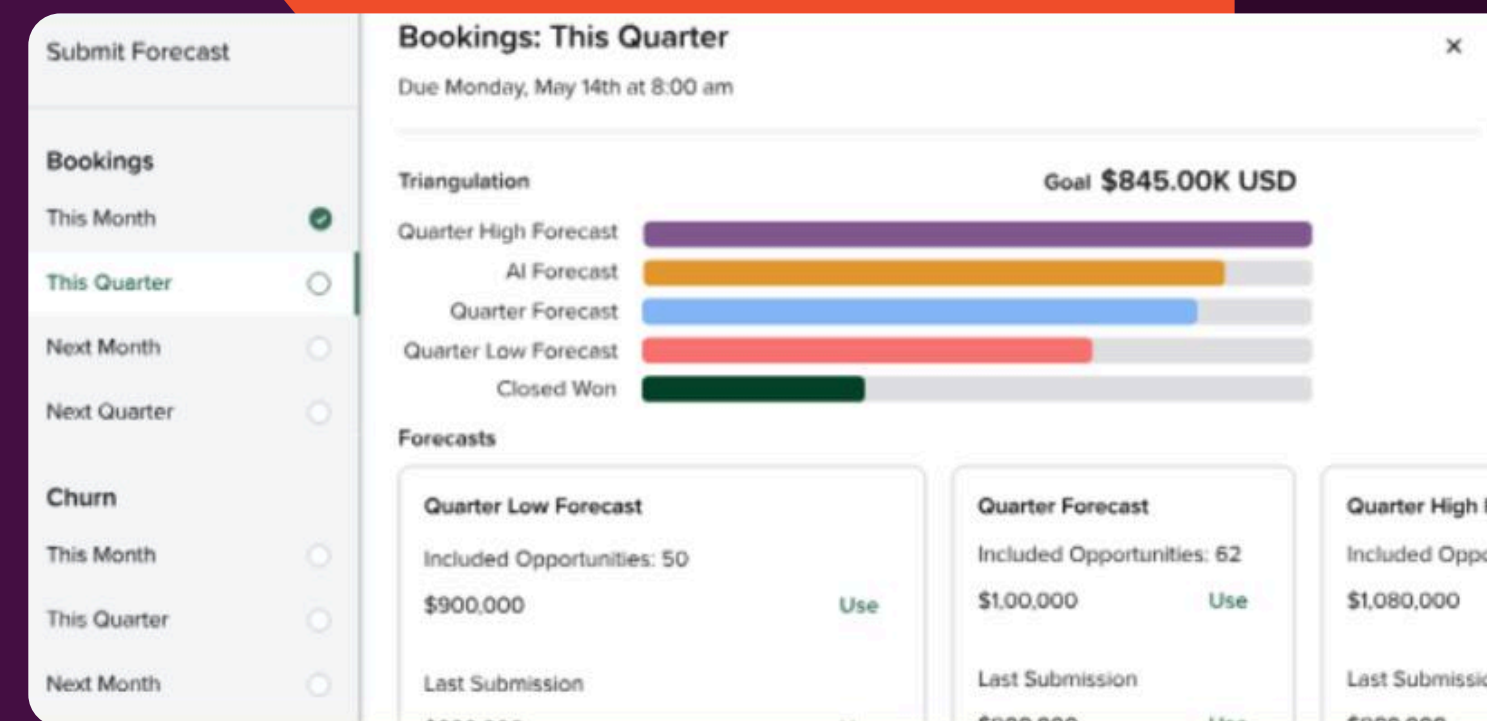


Chris Sidor

Former VP of Sales at
ORIGO Education

New AI tech strips out sentiment and manual work. Relying on hard sales data and past performance, Agentic AI generates accurate win predictions that roll up into reliable forecast reports.

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What this looks like in Salesloft AI Forecast

- **Salesloft's Forecast** *Data-backed predictions you can rely on.*

Machine learning crunches through your sales data to estimate the probability of deals being closed as won during the current quarter.

- **Our model with your data** *Reliable prediction that keeps on improving.*

Customize machine learning models with your company's sales data. Every new data point improves accuracy, making predictions more trustworthy.

- **On-track or not** *Know whether you're on track to hit goals.*

Track progress towards your revenue goals. Know when strategies are working and when to change things up.



Less Noise. More Action.

Sales organizations face an increasingly uncertain operating environment. Nearly [90% of executives](#) believe we're entering a prolonged period of volatility. What has worked before isn't working today. Deal and information overload are blocking attempts at analysis and improvement, locking organizations into a cycle of decline.

Deal management must change.

Its future lies in AI-human partnership, a strategy that plays to each party's strength. By tapping agentic AI to make sense of the noise and identify patterns, you can free your human sellers to focus on what they do best: selling.

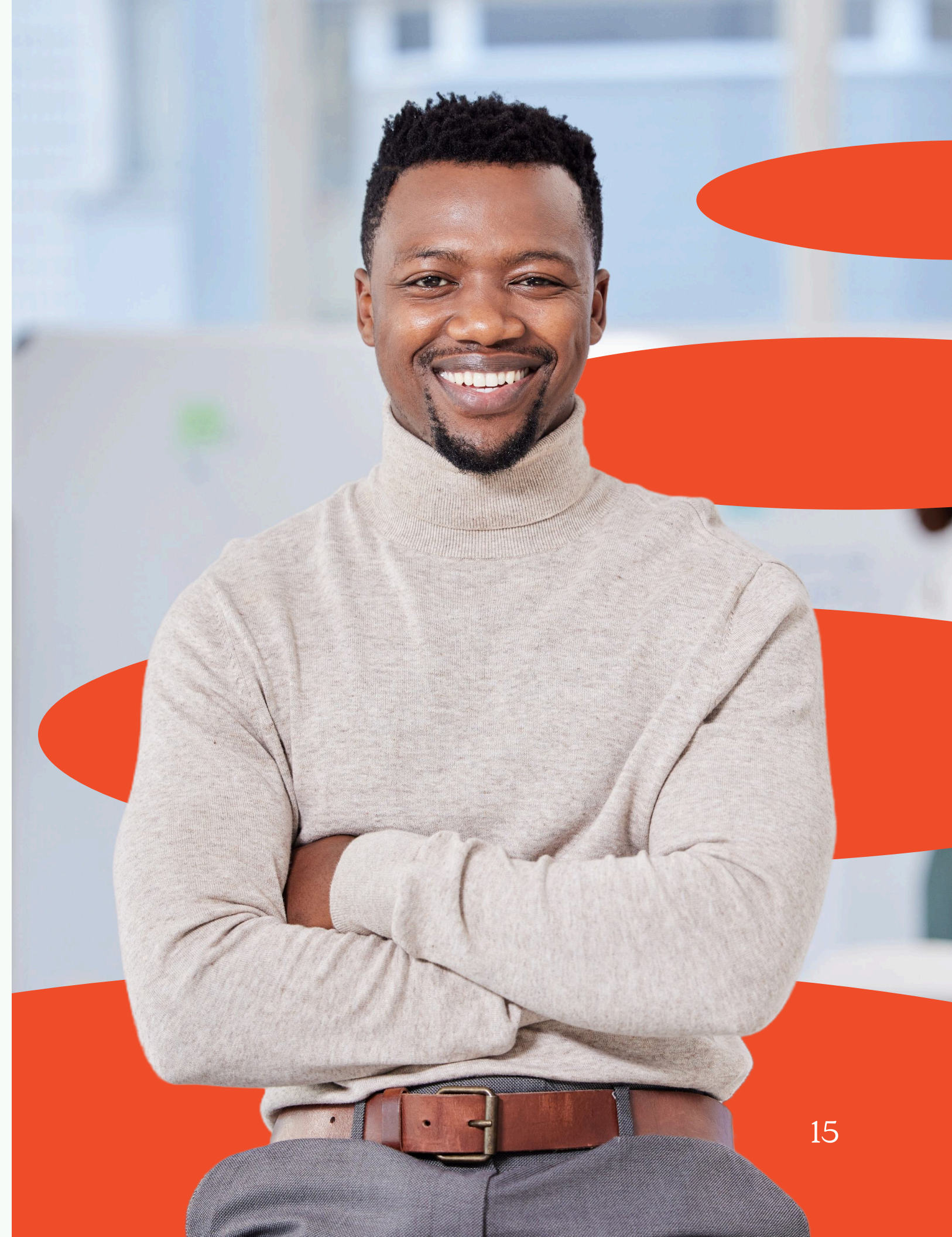
A reimagined agentic AI-powered deal management strategy can boost deal quality, seek and destroy risks, and accelerate revenue growth. But you need the right technology to make it happen.

Ready to learn more? [Request a demo](#) and the Salesloft team will show you how to transform your deal management strategy with agentic AI.

Get Demo

Salesloft delivers a Performance Force Multiplier, enabling the most demanding companies to drive durable growth in a new economic era. Salesloft's Revenue Orchestration Platform, delivering the first AI-powered Durable Revenue Engagement Model, keeps market-facing teams on top of all buyer signals, with outcomes-driven prioritization so they always act first on what matters most.

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