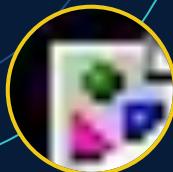




Point of View



Industry Trends

GenAI

Dominating the technical and product agenda of every tech provider

Transition from hardware to subscription / consumption model

80%

of B2B sales interactions will occur on digital by 2025

Expanding service offerings business and technical demands challenge enterprise IT ability, creating new opportunities

Efficient growth eclipsing "growth at all costs" mindset challenges historical operating model

2024 Tech Provider Top Trends: *Precision Marketing and Sales*

Rapidly evolving tech advances are resetting expectations for sales and marketing as **buyers** look for deeper and more meaningful engagement from tech providers.

Tech providers failing to adapt to new trends will see the erosion of deal quality and loss of relevance.

SOURCE

Gartner

PitchBook's strategic priorities require an optimal approach to global sales, customer success, and customer support functions, achievable through a revitalized engagement model that ***centralizes the GTM motion on the customer, not the seller***



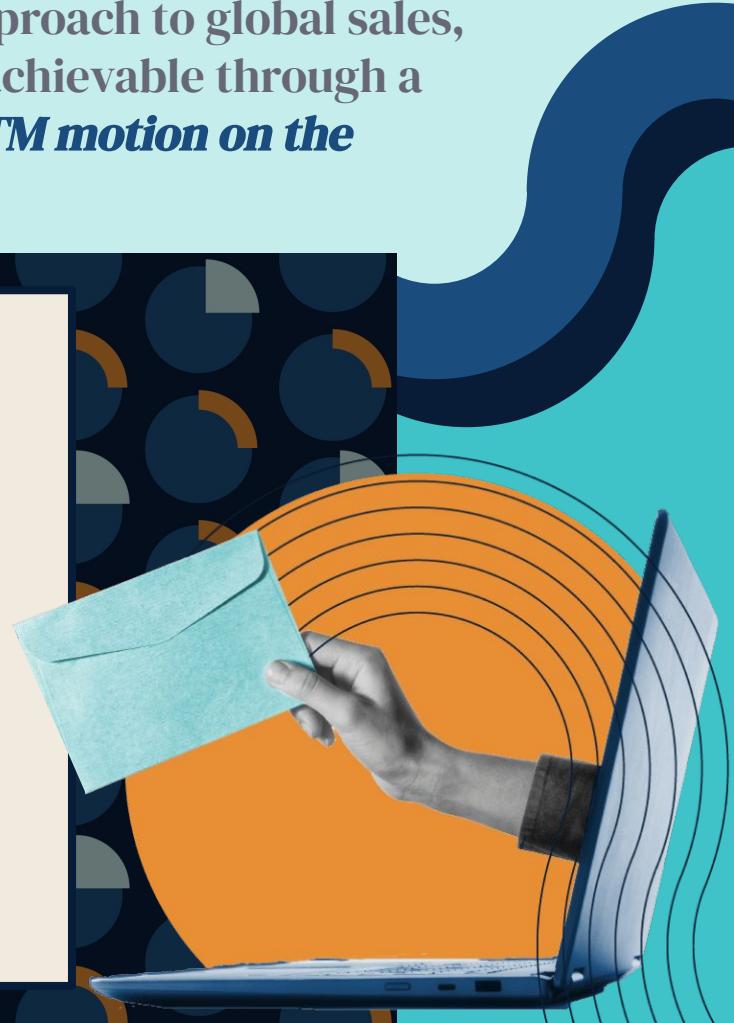
Maintain durable license volume and revenue through volatile macroeconomic conditions



Expand existing client relationships through license growth and cross-selling



Capture share in an widening TAM, thanks to expanding product capabilities



Contents

1

How Salesloft will support PitchBook's revenue ambitions
by driving the shift towards buyer-centricity

2

Why Salesloft is the only partner that can deliver a true
buyer-centric engagement model

3

The value that Salesloft expects to deliver to PitchBook





Protect a \$552M customer base

Maintain durable license volume and revenue through volatile macroeconomic conditions



Optimize customer experience and success

Capture, transcribe, and analyze calls to share the voice of the customer cross-functionally

- Efficiency
- Collaboration

Leverage first and third party signals for AI-prioritized customer success according to account engagement and needs

- Customer experience
- Retention

Promote product innovation to strengthen retention

Centralize and structure omni channel communication to proactively introduce the value and benefits of expanded capabilities

- Account engagement
- Feature adoption

Facilitate customer experience and product support capacity through web chat, with generative AI or customized routing to team members

- Customer experience
- Efficiency



Drive expansion within a 10,600+ client base

Expand existing client relationships through license growth and cross-selling, particularly during LCD integration



Identify and pursue expansion opportunities proactively

Enhance intra-team collaboration on key customer lifecycle milestones through bi-directionally synced deals dashboards

- Organization Collaboration
- Expansion pipeline Collaboration

Analyze call recordings for key words to surface expansion interest, and enable teams to share meeting clips and time-stamped notes

Introduce customer insight into the upsell workflow

Integrate third party intent signals from integration partners, and first party signals like platform adoption into AI-prioritized workflows

- Expansion pipeline
 - Expansion revenue
- Customer experience
 - Expansion pipeline

Deanonymize web traffic from customer accounts to enhance website experience and identify new stakeholders for expansion



Grow share in a \$6.5B total addressable market

Capture share in an widening TAM, thanks to expanding product capabilities



Identify and pursue net new opportunities

Deploy marketing-aligned playbooks and automations to expand market coverage without needing additional sellers

Connect PitchBook data to prioritize targets based technographic dynamics, like funding updates and financial results

Enhance seller prioritization and effectiveness

Ingest buyer intent signals into patent-pending Conductor AI, to prioritize seller actions based on likelihood to create revenue

Enhance visibility into seller KPIs, in-flight opportunities, and forecasts, to facilitate coaching and revenue predictability

- Efficiency
- Seller activity
- Targeting
- Qualified pipeline

- Deal velocity
- Revenue
- Coaching
- Pipeline health

Contents



1

How Salesloft will support PitchBook's revenue ambitions by driving the shift towards buyer-centricity

2

Why Salesloft is the only partner that can deliver a true buyer-centric engagement model

3

The value that Salesloft expects to deliver to PitchBook

A revenue stack that prioritizes “Best of Breed” point solutions cannot holistically orchestrate a cohesive and personalized buyer journey

Point solution	Point solution Value	Limitations of a “Best of Breed” philosophy	Consequence
PitchBook’s data & Intent signals	Prioritize selling efforts	Without embedding intent into a guided-selling workflow, teams cannot leverage insights to architect highly-personalized buyer experiences at scale	 Conversions  Win rates
Conversational marketing	Capitalize on website engagement	In isolation, web chat only influences a single type of engagement at the top of the funnel and fails to distribute intent signals from buying teams to the rest of the workflow	 Stakeholder networks  Deal size
Sales engagement	Engage buyers more often and through more channels	Without connections to intent data, conversation intelligence, and opportunity management, Sales Engagement cannot predict the ideal time and place to engage a specific buyer	 Conversions  Win rates
Conversation intelligence	Capture and understand the voice of the customer	Without leveraging conversation insights in the workflow for guided selling, teams cannot ensure that reps will consistently translate a specific buyer’s voice into an impactful buyer journey	 Win rates  Deal velocity
Opportunity management	Prioritize and collaborate on deals	Leaders only have so much capacity for pipeline inspection and deal coaching. Without connecting key deal data into the workflow, organizations cannot scale individual and personalized buying journeys	 Win rates  Deal velocity

Through its comprehensive platform approach and unique signal activation capability, Salesloft is the only partner able to facilitate a truly buyer-centric experience at PitchBook



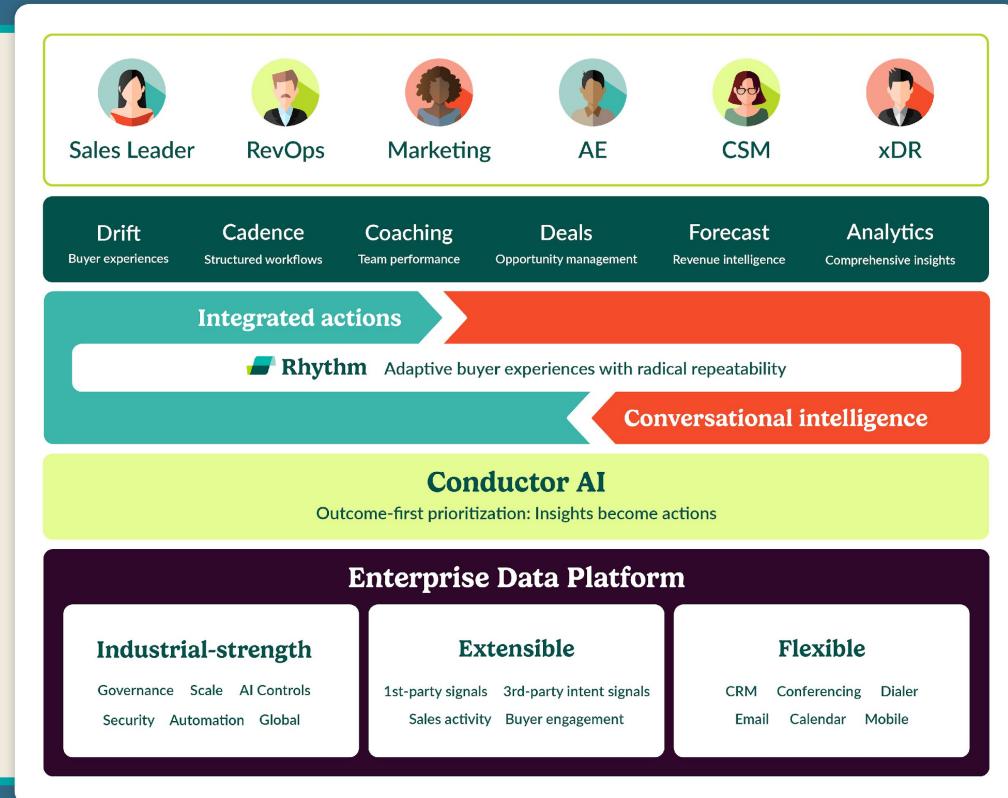
Consolidates key revenue technology into an integrated platform



Ingests data across PitchBook's own first-party systems and all customer interactions to provide continuous insights across buying and selling teams



Leverages patent-pending AI to turn all buyer signals and customer data into a prioritized list of seller actions, ***ensuring highly individualized and personalized buyer experiences at scale***



How signal activation and AI-led prioritization will transform PitchBook's engagement model towards buyer-centricity

How we deliver differentiated AI capability



Many revenue tools can monitor buyer engagement



But only Salesloft can connect to custom signals, including PitchBook's own first-party data sources, to deliver **engagement monitoring that's fully customized to PitchBook**



And Salesloft is the only offering that utilizes patent-pending AI to aggregate those signals and deliver **custom, prioritized workflows that improve revenue effectiveness**

What it means

Revenue organizations that leverage Salesloft improve more than just seller activity **VOLUME**

They see greater activity **IMPACT**, by selling based on buyer signals from a fully-customizable set of data sources - meeting buyers at the right place, and the right time

Our customers see as much as a **40% reduction in activities required to generate an outcome**, like booking a meeting

Contents

1

How Salesloft will support PitchBook's revenue ambitions by driving the shift towards buyer-centricity

2

Why Salesloft is the only partner that can deliver a true buyer-centric engagement model

3

The value that Salesloft expects to deliver to PitchBook



Estimated business impact

120 hours

Saved per seller,
per year

\$65M

Incremental
pipeline

\$16M

Incremental
revenue





Point of View

