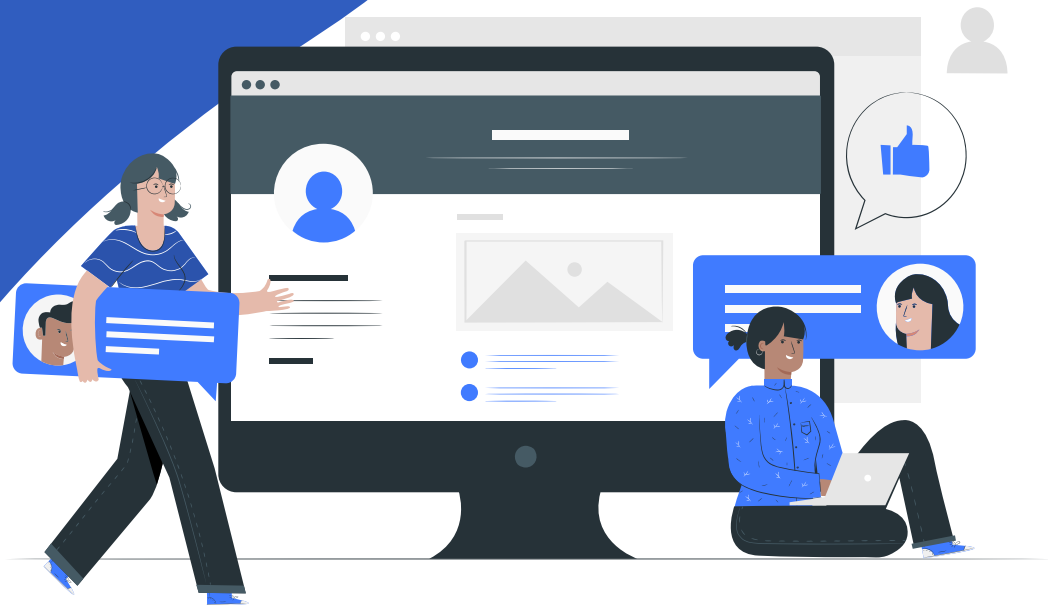


Clari Case Study

Samantha Uy Tesy



Purpose and Intent

The purpose of this case study is to

- Better understand Clari as a company
- Better understand Clari's products
- Better understand Clari's market and competitive standing

The intent of this case study is to

- Create a high level view of my understanding of Clari's value add in the market
- Practice the “product mindset” with a real company with real users and real goals

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01 Introduction

Who is Clari?



“Our mission is to set our customers up for consistent success by creating a new selling culture powered by transparency and actionable insights.”

—Clari



Not just a product, but an ecosystem

Clari empowers user to

- Improve visibility and collaboration across sales teams and throughout the organization
- Leverage AI technology to
 - Integrate various sales tools
 - Manage your revenue levers
 - Monitor customer engagement

Companies big and small can

- Develop accurate forecasting
- Actively manage revenue
- Make data driven decisions
- Optimize sales leads interactions



Services Offered

Sales

Forecasting

Real-time insights on sales forecasts



Pipeline Management

High level sales pipeline visibility



Revenue Intelligence

Actionable insights to sell more efficiently



Account Engagement

Identify how efficient reps are engaging with accounts



Services Offered

CRM Automation

Saves sales reps' time by automatically logging sales activity



Sales Analytics

Predictive insights and visibility with AI



Mutual Action Plan

Cross-team collaboration to optimize sales execution



Clari's CEO



**“Our job is never done.
There is always more to
deliver.”**

-Andy Byrne, 2021

Andy Byrne



Current Co-Founder & CEO of Clari

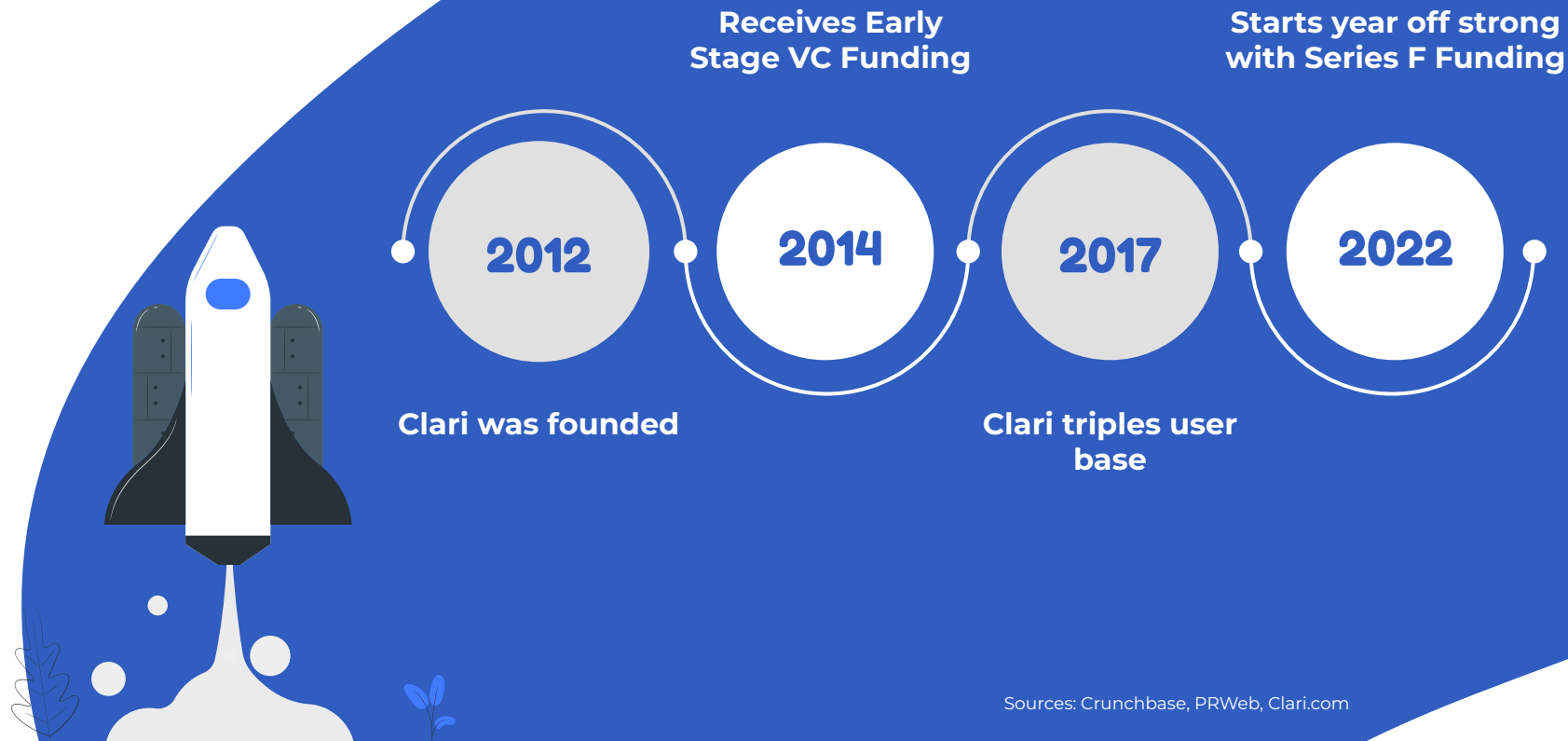
Education

- B.A. Economics, University of Nevada, Reno
- M.B.A Technology & Innovation San Jose State University

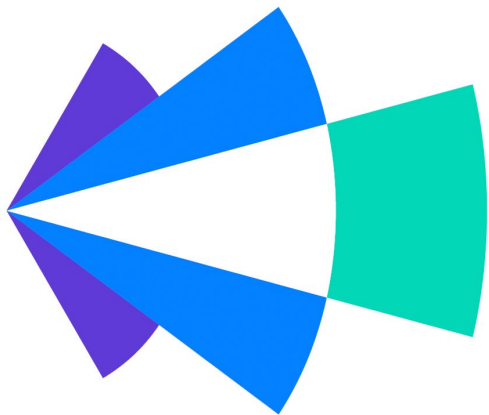
Notable Experience

- 2x Founder & CEO
- 8+ years of Sales Experience
- Former VP Business Development @ Symantec

Throughout the years



Clari's Statistics



Clari



~500
Users



\$496M
Funding



2K+
Followers



17
Investors



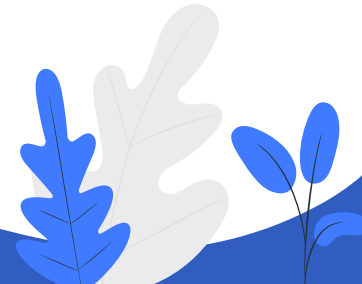
27K+
Followers



4.7
Rating

02 Research

What does Clari's market and users look like?



Market Analysis

What does Clari's market look like?



Who Are Clari's Competitors?

There are several competitors (direct, indirect, potential and substitutes) in the market. This research focuses primarily on who I believe are important based on size, maturity, branding, features, and customer reviews.



Top Features Customers Care About*

**Forecasting
Ability**

**Mobile
Functionality**

**Seamless
Integration**

*Based on G2 Customer Reviews

How does Clari Stack Up?

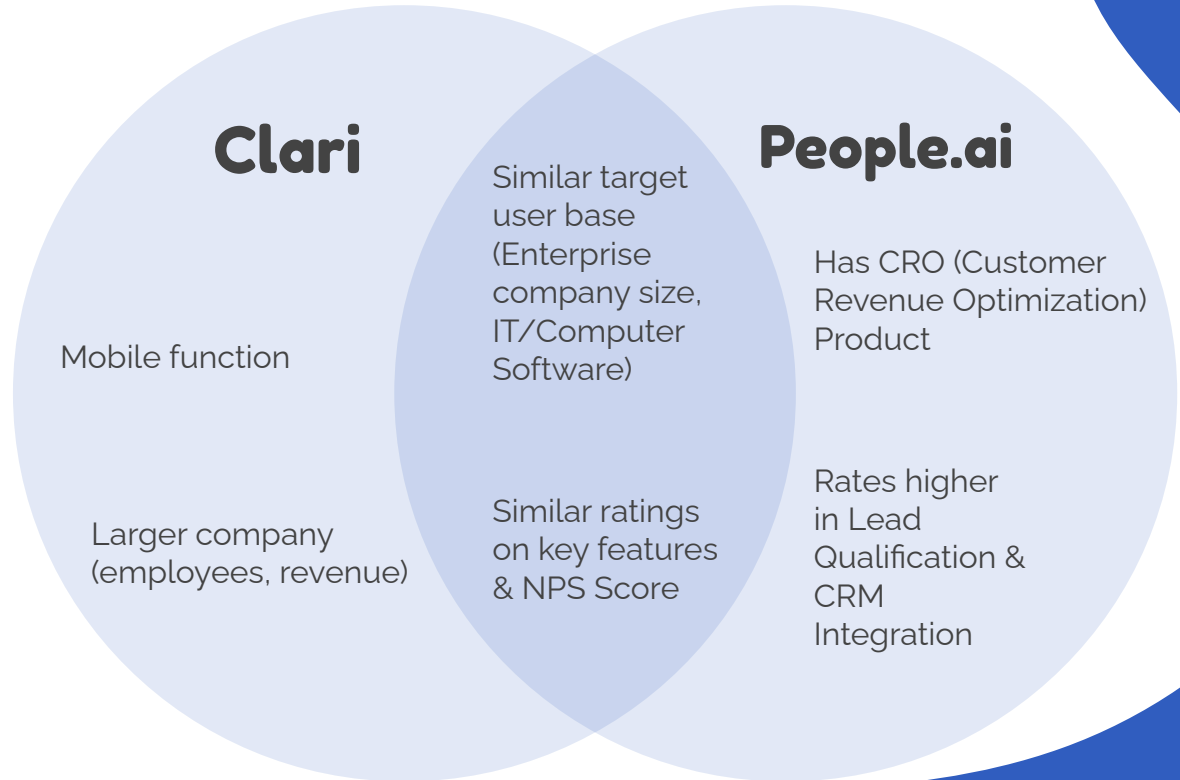
A **Competitor Feature Table** gives a high level view of how Clari's products compare to competitors on a feature level

	Gong	Pipedrive	People.ai	Tableau CRM	Clari
Forecasting Ability	8.5★	No Info	8.7★	8.4★	9.2★
Mobile Functionality	Yes, iOS & Android (3★)	Yes, iOS & Android (4★)	No	Yes, iOS & Android (4.8★)	Yes, iOS & Android (4.7★)
Seamless Integration	9.0★	8.7★	9.1★	8.0★	8.2★

Source: G2, Owler, Comparably, Company websites

Prioritization of Competitors

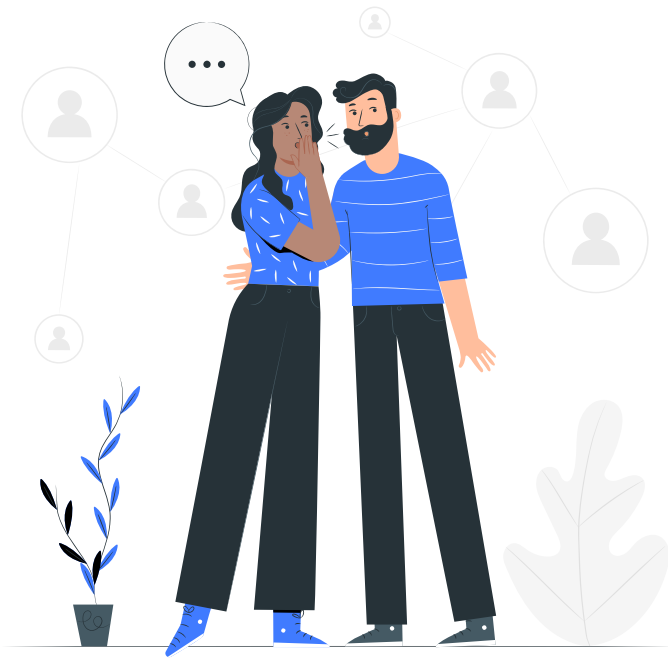
Given the preliminary research, I believe People.ai is a strong direct competitor



Prioritization of Competitors (cont.)

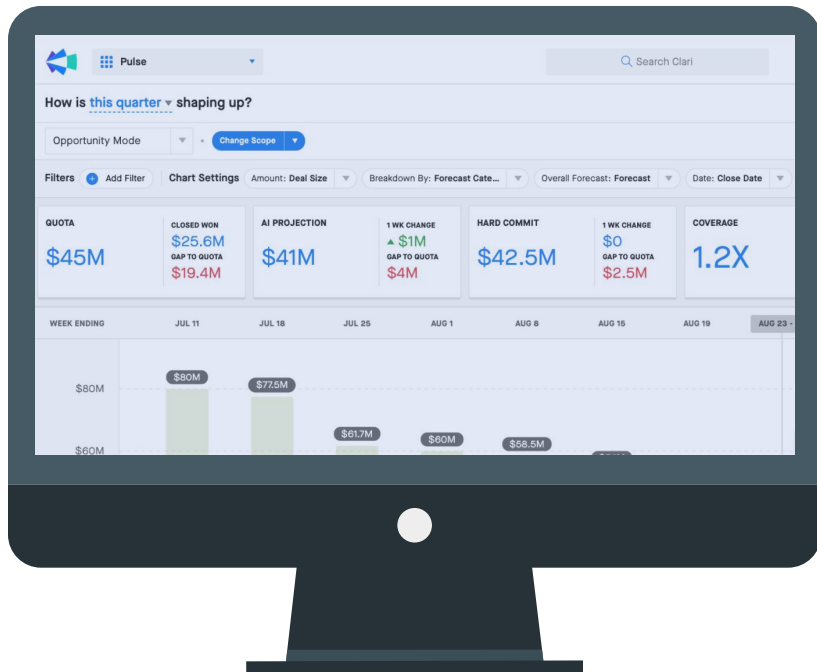
While they may not be **direct competitors** (i.e. indirect competitors) it is still important to monitor competition to maintain edge. Here are how the other competitors stack up.

Pipedrive	Gong.io	Tableau CRM
<ul style="list-style-type: none">• Different target market (small businesses is 68%)• Inferior ratings for several features	<ul style="list-style-type: none">• Highly rated• More funding• Several great features users love• More conversations (e.g. G2 reviews, tweets, followers)• Different target market (mid-market is 73%)• Inferior product design	<ul style="list-style-type: none">• Has name brand association• Similar target market• Inferior ratings for several features• Lacking Revenue Intelligence, CRM Integration, and Account Management Products

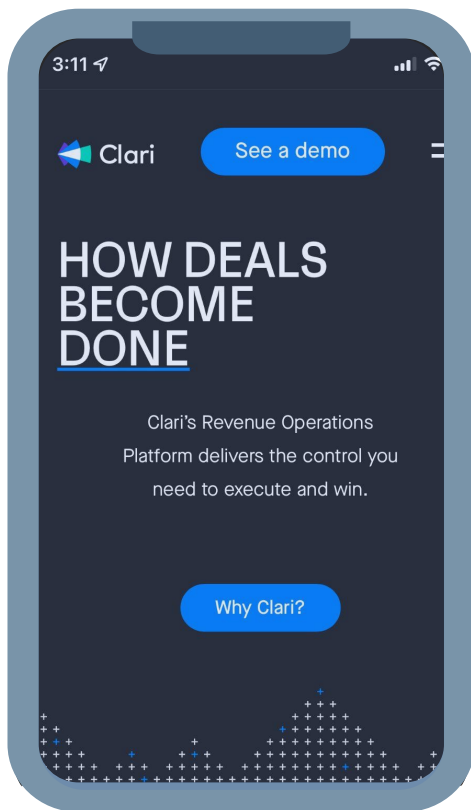


User Analysis

What do people think about Clari?



What do users say
about Clari's
Products?



“Clari makes Salesforce CRM usable for day to day [operations management] with mobile [capabilities] and accurate forecasting”

-Director of Sales

“Clari saves [us] time to invest in higher quality sales engagement”

-User in IT

“Clari is easy to use. Fantastic dashboards and reporting”

-Mid-market Enterprise Sales Manager

Who are Clari's Users?

Simple User Personas



Account Manager

This user needs real time insights to how accounts are performing so they can best allocate resources



Sales Reps

This user wants easier tools so that they can spend more time interacting with clients



Consultant

This user enjoys accurate forecasting so that they can make purposeful recommendations



VP/Director Sales

This user needs holistic reporting on health of sales team so that they can make data driven decisions

Persistent Pain Points

Clari's User Base constantly complains about these 3 areas

Imperfect Sync (CRM)

"Not 100%"

"Need to auto refresh"

"Does not notify me when it needs to be refreshed"

More Work

"I don't see the value I get as a rep"

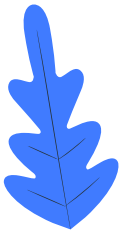
"Entering lots of data I already entered into Salesforce"

Filtering Feature

"Can't filter by CRM score"

"Can't filter by large groups"

"Underutilizing Clari's functionalities"

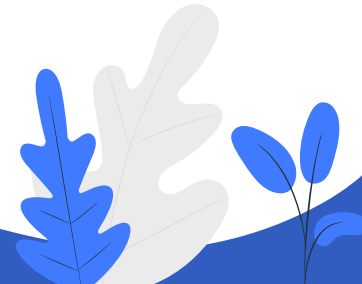


Source: G2



03 Improvements

How would I improve Clari?



Product Manager for the Day

If I were the Product Manager at Clari for the day, how would I improve upon Clari's existing functions?

I would approach the problem in 4 steps

1. **Identifying** the business objective and metrics that are important to Clari's mission
2. **Empathizing** with users to understand their pain points better
3. **Brainstorming** different solution that can solve for these pain points
4. **Developing a solution** and bring it to market!



Identify

What is our Goal?

Mission: Improve sales processes by providing transparent & actionable insights

How do we achieve this?

From a **product perspective**, we want to make the product more informative and insightful for its users

From a **business perspective**, a more insightful product will be of high lifetime value (LTV) to users and should improve key performance metrics retention and user happiness

*This business objective was formulated as part of an independent case study and does not represent the actual objectives of Clari or its employees

Empathize

Who are the users?

What is our Goal?

Think about **who are our users** and what are their **pain points**?

How do we achieve this?

Users include: Sales VPs/ Executives, Account Managers, Sales Reps, Consultants, Marketing Partners, Finance Partners [\(click here to view some personas!\)](#)

In order to create a more defined segmentation, let's partition these users into mutually exclusive groups

Empathize

Who are the users? (Cont.)

User Segmentation Process

Data Plugs: This user enters in data that will make its way into Clari's AI. These users interact with the prospects/leads/accounts and use Clari as a place to jot down their notes

Data Storytellers: This user takes in the data and organizes it to tell stories about how the sales organization is performing

Data Champions: This user consumes the final report and makes important executive decisions on how the sales organization will move forward

Empathize

Defining Target User

Prioritization Criteria

1. **Total Addressable Market (TAM):** Who are the people we can touch?

Users who are already using Clari for its intended purpose (sales insights) should be our focus, since our goal is to improve informativeness and insights

2. **Unmet Needs:** What are the user friction points?

Users should have a clear friction that is either frequent, intense, or both

Empathize

Defining Target User (Cont.)

Prioritization by User Segment

Data Plugs	Data Storytellers	Data Champions
<p>Large TAM, low frictions</p> <p>There are many more Data Plugs who may need to enter in data</p> <p>There is low friction among this group since they do not derive many insights</p>	<p>Medium TAM, high frictions</p> <p>There are fewer Data Storytellers who have to organize the data</p> <p>There is high friction among this group since they are in charge of deriving the insights</p>	<p>Low TAM, medium frictions</p> <p>There are even fewer Data Champions who have the authority to lead change within a sales organization</p> <p>There is medium friction among this group because they derive value from insights, but they are not managing the data</p>

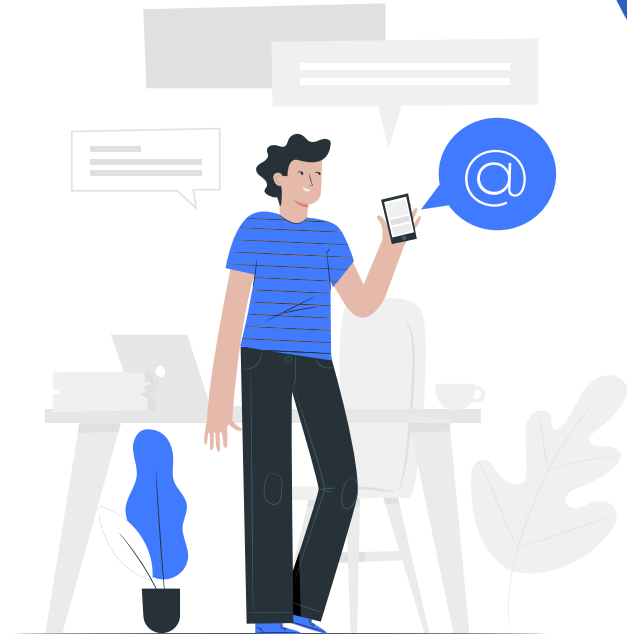
*This business objective was formulated as part of an independent case study and does not represent the actual objectives of Clari or its employees

Empathize

Defining Target User (Cont.)

Prioritize Data Storytellers

Based on the user segmentation and the prioritization criteria, I believe we should focus on the data storytellers and create solutions to solve for their pain points.



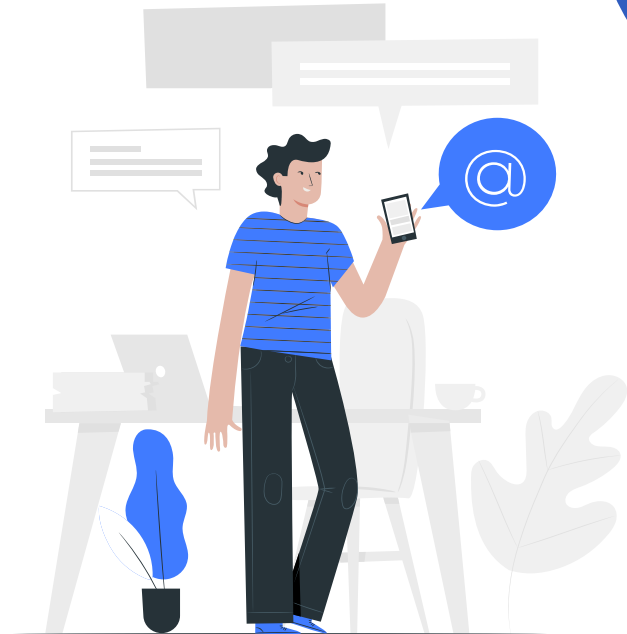
Empathize

Defining Target User (Cont.)

Pain Points

As a data storyteller, I struggle with

- Developing reports on a regular cadence
- Formatting dashboards to be intuitive and informative
- Managing key performance metrics like revenue, churn, relationships
- Creating accurate sales forecasting reports



Brainstorm

How can we solve for target users?

Solving for User Pain Points

Developing reports on a regular cadence

- Potential Solution: Develop a daily/weekly/monthly reporting feature that will manually generate **“auto report”** and send it to key stakeholders automatically

Formatting dashboards to be intuitive and informative

- Potential Solution: Develop a **“smart view”** feature that suggests a dashboard format & filters for a specific goal (ex. XYZ Company has Quarter goal of increasing outbound calling relationships)

Managing key performance metrics like revenue, churn, relationships

- Potential Solution: Create a **“smart recommendation”** tool that will give you suggestions on what areas to focus on to achieve KPIs

Creating accurate sales forecasting reports

- Potential Solution: Create **“adaptable forecasting”** report that adapts to information about current business trends and predictions

Brainstorm

How can we solve for target users? (cont.)

Prioritization Criteria

Impact vs. Effort: How much does our solution impact our target user versus how much does it cost to build this solution (dollar amount, time, engineering effort, design effort).

Goal: Assign numbers to Impact and Effort: 1- Low, 3- Medium, 5- High and take difference

Auto Report	Smart View	Smart Recommendation	Adaptable Recommendations
Impact: 3 Effort: 3 Sum: 0 Requires auto-refresh capability and email integration	Impact: 5 Effort: 1 Sum: 4 Requires research to develop various views which reconfigures existing formats and filters	Impact: 5 Effort: 3 Sum: 2 Requires logic that will trigger recommendation based on KPI	Impact: 5 Effort: 5 Sum: 0 Requires technology that will interpret various forms of business trend reportings and then logic to translate into recommendations

*This business objective was formulated as part of an independent case study and does not represent the actual objectives of Clari or its employees

Proposed Solution

In Summary

- We are solving for the Data Storytellers who interpret and organize information collected to turn it into actionable and insightful reports
- I prioritized a pain point, that users struggle with the ability to create dashboards that are informative and intuitive
- I prioritized a solution based on impact and effort
- Thus, we should test the viability of a “Smart View” feature. The “Smart View” feature will be various templates that a user can pick based on their particular goal at the moment

In order to test the viability of the new feature, I suggest we launch a **Minimal Viable Product (MVP) Experiment**



Minimal Viable Product

What is the MVP?

- The product will be a Beta Product in the form of a “drop down menu”
 - The drop down menu will house 1 or 2 “Smart Views”
 - We can develop these “Smart Views” based on research of commonly used formats/templates for common goals
- We will create benchmarks for our metrics
 - We will use these to develop our minimum criteria for success
- We will run the experiment for 3 months

Hypothesis: Users want to create dashboards that fit their specific goals

Goal of MVP



Knowledge

Understand if we hypothesized right solution for the right target users



Data

Collect necessary data to validate our hypothesis



Save Resources

Waste as few resources as possible in testing hypothesis



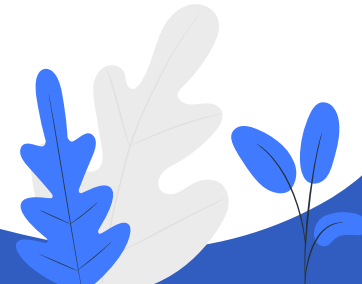
“Fail Fast”

Validate big assumptions first to inform next steps



04 Go-to-Market

How would I launch my solution?



Go-to-Market Strategy

Step 1

Launch our MVP product



Step 3

Collect data



Step 5

Proceed with next stage of feature or kill feature



Step 2

Inform our users of the new feature (e.g. Marketing)



Step 4

Compare metrics against acceptance criteria



Key Assumptions



Organization

User struggles to create the perfect dashboard for their needs



Benefit

User will benefit from a customized dashboard



Goal-Oriented

Users want to see views based on their organization's goals

How do we track & define success?



Metric

Aligning with our goal, we
are concerned with

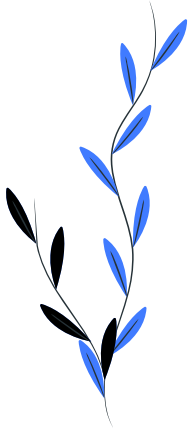
Retention
User Happiness



Acceptance Criteria*

In order to ensure the
success of our project, we
need to outweigh the costs
(dollar amount, time,
engineering effort)

*Not assumed for this exercise



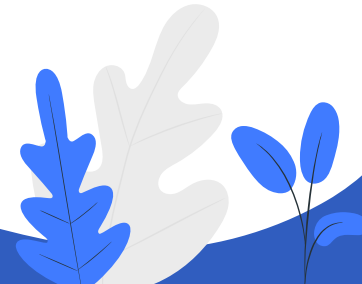
Tracking Metrics

Based on Google's HEART Framework

	Goal	Signal	Metric
Happiness	Maximize user satisfaction with product	<ul style="list-style-type: none">• User feedback• NPS Score	<ul style="list-style-type: none">• User feedback (ratings) improves over time• NPS Ratio of 10 over total
Retention	Maximize the number of users who use Clari on a weekly basis	<ul style="list-style-type: none">• Time spent between last open	<ul style="list-style-type: none">• % of people who use on weekly basis compared to total

05 Conclusion

Final Solution + What did I learn?



Final Solution

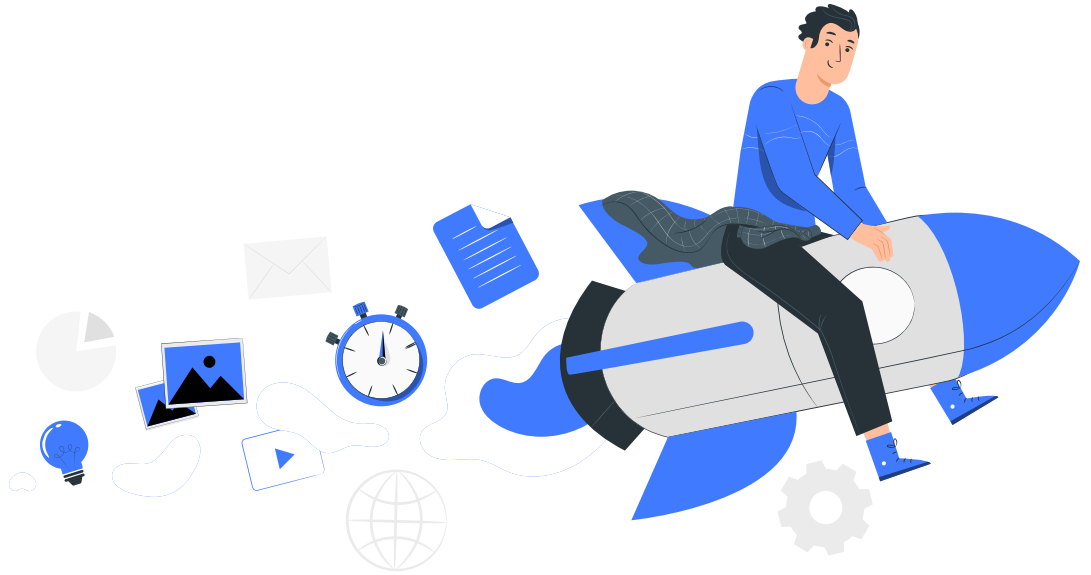
- I developed an MVP experiment to test the viability of our solution before taking a fully fledged feature to market
- If the MVP is successful, we should see improvements in our specific metrics
- Based on the Clari's acceptance criteria (which was not assumed for this case study due to lack of information), if the metrics surpass the criteria, I recommend that we move forward with creating more and improved "Smart Views" in an **iterative manner** and track our metrics as we release updates of our feature
- Otherwise, if the metrics did not surpass our acceptance criteria, either kill the feature or reimagine MVP with new assumptions and try again!

What did I learn?

- Who Clari is and their value add in the marketplace
- First hand accounts of how real Clari customers feel about Clari's products
- How to conduct a formalized competitor analysis to determine where an organization should focus its resources
- How to compare companies using G2
- The ability to “put yourself in the users shoes”
- How to prioritize in an intuitive and communicable way
- How to develop and test a valid hypothesis
- How to develop relevant metrics that are testable and informative



Thank you!



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