

WHY KELI CONSULTING



Scaling revenue operations successfully depends on the strategic implementation of right sized solutions. Ensure the right systems are in place for your sales teams to drive revenue and to guarantee best in class service for your customers



CONTENT

Ensure your sellers have the right information at the right time to close the deal.

TRAINING

Certify that sellers possess the skills, knowledge, and tools to maximize every buyer interaction and can properly articulate your value proposition

ENGAGEMENT

Motivate team members and channel partners with an engaging experience that fully captures mindshare and ensures strategic alignment

Keli Consulting will work with you to identify capability gaps and prioritize the right solutions for your industry and more importantly for your company and team.



INSIGHTS: Gain visibility into sales operations and pull clarity from complexity with easy to consume dashboards that turn raw data into actionable intelligence. Enable faster responses, more accurate forecasting and continuous improvement with Sales Enablement Insights.

CAPABILITIES CHECKLIST - CONTENT (1)



ENSURE YOUR SELLERS HAVE THE RIGHT INFORMATION AT THE RIGHT TIME TO CLOSE THE DEAL.

Collaboration & Feedback Loops

- Create shared spaces for content management
- Bookmark items for later use
- Share content with individuals & groups
- Automatically route content feedback
- Enable user reviews and ratings

Content Customization & Personalization

- Dynamic sales plays for reps
- Streamlined sales communications
- Just-In-Time training association
- Guided browsing with featured content and filters
- Built-in page editor for custom experiences

AI-Driven Recommendations

- Recommendations within CRM records and platform
- Predictive AI content scoring

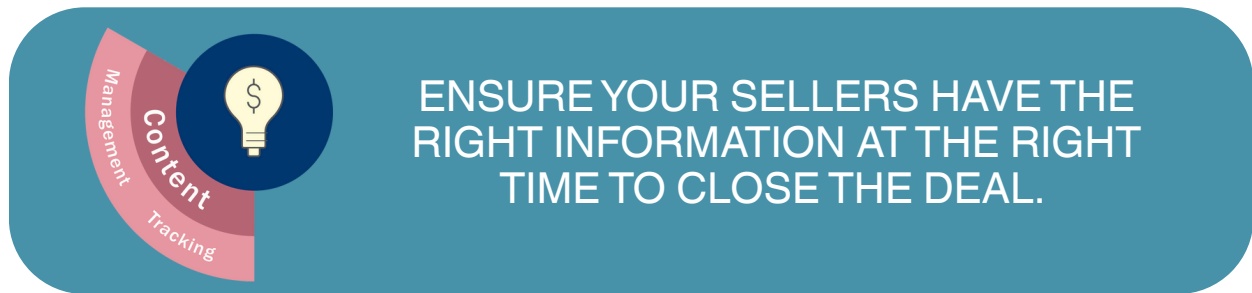
Search & Discovery Capabilities

- Full text and acronym search
- Auto complete
- Search content of links
- Search images (OCR)
- Spelling corrections
- Search suggestions
- Thumbnails and skim preview in Search results
- Search by color
- Google-style search operator language (AND, OR, etc.)
- Other dynamic search features
- Auto video & audio transcription & search

Content Editing & Remixing

- Native editing with Microsoft Office and G Suite
- Remix slides within/across presentations and media types

CAPABILITIES CHECKLIST - CONTENT (2)



Content Analysis & Reporting

- Content usage dashboard (producer views, shares)
- Content engagement tracking (consumer view duration)
- Real-time email engagement tracking
- Advanced analytics (file type, inventory, location)
- Analysis: content awareness (are reps finding it?)
- Analysis: content freshness (content age, turnover)
- Pitch activity and tracking
- Business impact analytics (revenue influence, conversion uplift)
- Unified analytics across content/training; scorecards; learner progress/score reports; self-service manager reports; BI platform integrations

Content Management & Governance

- Content management (expiry,

featured, schedule)

- User collaboration & feedback loops (comments, etc.)
- User ratings, reviews
- Agile content collaboration (editing within platform)
- Content governance (approval workflows)
- Edit & repurpose calls
- AR/VR content supported
- Content personalization
- Predictive AI content with scoring
- Content permissions (restrict/grant access, sharing, download)

Advanced Publishing

- Auto detect languages and relate items
- Schedule/expire/archive content; mark as internal/restrict sharing/prevent download
- Set properties on multiple items; map metadata from CMS; auto update from CMS

CAPABILITIES CHECKLIST - TRAINING



CERTIFY THAT SELLERS POSSESS THE SKILLS, KNOWLEDGE, AND TOOLS TO MAXIMIZE EVERY BUYER INTERACTION AND CAN PROPERLY ARTICULATE YOUR VALUE PROPOSITION

Training Capabilities (Knowledge Transfer)

- Customizable curriculum
- Custom rich, guided course catalog and learning tracks
- Drag & drop lesson designer
- Asynchronous learning & coaching
- Just-In-Time learning
- Embedded training in sales plays
- Learning reinforcement
- Support mobile devices
- Activity tracking
- Measure achievement
- Management reporting & enablement

Coaching Capabilities (Upskilling)

- Ad hoc practice & coaching
- Conversation intelligence
- Video coaching with speech-to-text translation & analysis
- Machine learning recommendations for next best action
- AI powered conversation intelligence: Pitch, tone, pace, etc.
- AI guided practice & roleplay



CAPABILITIES CHECKLIST - ENGAGEMENT



MOTIVATE TEAM MEMBERS AND CHANNEL PARTNERS WITH AN ENGAGING EXPERIENCE THAT FULLY CAPTURES MINDSHARE AND ENSURES STRATEGIC ALIGNMENT

Social & Sharing

- Social templates with dynamic fields and associated items
- Real-time social engagement/location tracking
- Option to convert shared content to PDF
- Social platform integrations: LinkedIn, Slack, Sales Navigator, Twitter, Facebook, etc.
- Unlimited storage/bandwidth

Engaging Platform

- Branded environments
- Platform customizability
- Digital Sales Room (DSR)
- Content notifications (App) & promotions
- 24/7/365 support
- Mobile first design
- Intuitive/Ease of Use/3 click pathway

Analytics

- Measure engagement
- Social engagement tracking
- Social location tracking

Social Engagement

- Peer collaboration & feedback loops (user ratings, reviews, comments, likes, feedback, etc.)
- Sales announcements (streamline sales communications)
- Seller feedback

Integrated Incentives

- Gamification
- Leaderboards
- Merchandise
- Points & rewards
- Forms & other reporting integration
- Status achievement

CAPABILITIES CHECKLIST - TECHNOLOGY



CRM Support

- Content targeting in CRM records
- Full platform experience within CRM tool
- Automatic activity logging in CRM
- Administrative integration of users, roles, profiles, groups

Integrations, Email & Workflow

- Email – plugins for auto tracking within Outlook
- Email – email templates with HTML
- Email – email templates with dynamic fields and associated items
- Real-time email engagement/location tracking
- Option to convert to PDF when sharing via email
- DAM – Integration
- MAP – Integration
- Integration with Outlook, Gmail, SalesLoft, Outreach, ToutApp, Yesware
- DKIM/SPF support for deliverability

Security & Administration

- SOC2 compliance and third-party penetration testing
- 24/7/365 worldwide support and support request routing
- Web-based administration across OS/browsers
- Sandbox for new features and role/group synchronization
- Dedicated customer services and custom business reviews
- Branded environments

Partner & Channel Configurations

- Flexible partner configurations and branding/SSO options
- Restricted partner roles and synchronized partner content

