



Getting Started:

Drive Firm Revenue & Quickly Deliver Actionable Insights to B2B Clients

Bridge the Growth Gap  **Measure what Matters**

Cien.ai has a standard approach to Get Started.

Cien.ai's **White Glove Project** is a 60 day, fully managed process whereby the Firm can evaluate Cien.ai's capabilities, and learn more about the solution. The Project quickly delivers actionable insights to a Firm B2B Client and the Firm solidifies business case for a long term partnership.

Key Tasks:

- 1) Business Case (Pilot Scope + Long Term Partnership)
- 2) Vendor & InfoSec approval
- 3) Legal Approval of Cien.ai Terms & Conditions



- Define **Initial Business Case**
 - Pilot Project to evaluate Cien.ai Capabilities
 - Scope & Time frame of Project
- Kick off InfoSec
- Legal Approval of [Cien.ai Terms of Service](#)
- Initiate Pilot Project - deliver value quickly (1-2 weeks)
- Evaluate longer term partnership



Management Consulting is **competitive**.

AI tools are disrupting Management Consulting business models. An AI data driven edge is critical to maintain margins, win new business.

Cien.ai is the solution.

A secure, seamless AI-native data analytics platform to drive value out of CRM data, it is white-labeled by leading Management Consulting firms who leverage Cien.ai to win new business, quickly deliver actionable client insights, and make engagements more profitable.

Management Consulting Firm Priorities:

- ✓ Deliver “brilliant basics” at engagement onset
- ✓ Harness AI for Profitability & Competitive Edge
- ✓ Expand & Sell New Engagements
- ✓ Speed time to actionable client recommendations



Leading Management Consulting (“MC”) Firms use Cien.ai to speed time to actionable client insights.

- Used by multiple Practice areas (Private Equity, M&A, Strategic Transformation)
- B2B businesses in any industry; middle market to public companies
- White-labeled & Flexible cost structure allows you to determine the billing

MC Firm Clients benefit from unique insights:

- Actionable roadmap for growth with millions of dollars in actionable revenue growth
- Secure, seamless one-click integration to Salesforce, Hubspot, Dynamics
- Insights delivered in days using latest AI powered LLM technology

MC Firm uses Cien.ai to drive Firm revenue:

- Win new business
- Expand existing engagements
- Operate more profitably

Accretive Growth Insights in Days: Multi Sector Private & Public companies



Segment	Management Consulting		PE PortCo		B2B Enterprise
Business	Top 5 Global Public SaaS Provider	CHF 120M Telecom Company	\$0.5B Photography Services Provider	€20M Information Broker	\$800M Telecom Tech Provider
Stated Objectives	Revive growth, after a few disappointing quarters	Identify GTM opportunities in B2B business using AI/ML	Commercial performance and EBITDA via GTM effectiveness	Understand growth levers & increase avg. ACV	Reignite growth by diversifying client base
Financial Impact	\$180M in new logo bookings	CHF16M (\$18M) in rev growth (~15% total rev)	\$10M incremental EBITDA	€5M (\$5.2M) revenue increase	\$50M revenue increase
Time to Insights	15 days	10 days	5 days	5 days	5 days
Time to Value	2 Month (100% Realized within 2 year)	2 Month (100% Realized within 1.5 year)	60 Days (100% realized within 1 year)	45 Days (100% realized within 1 year)	180 Days (100% realized within 2 years)
Transformation Context	<ul style="list-style-type: none"> Expected win rate for new logo had declined to just 12% from 20% in prior years Analyzed current rep behavior and noticed hunters where not effectively targeting the best new logo accounts Implemented new targeting mechanisms to guide sellers and monitor lead & pipeline quality 	<ul style="list-style-type: none"> Identify expected win rates and developed execution plan for achieving them Identified opportunities to free up rep time spent on low probability prospects Developed guidelines to improve operational effectiveness by utilizing SFDC more effectively 	<ul style="list-style-type: none"> Simplified field seller roles from 5 different hybrid roles to 2 seller roles focused on hunting and farming. Clearer performance targets and better coaching. Optimized account coverage model, aligning field sellers to high value segments and deploying inside sales team for lower value accounts 	<ul style="list-style-type: none"> Identified reasons for lack of cross-selling (combined) Defined new team structure (too complex structure for size of business) Improved Targeting of Accounts for higher ticket services 	<ul style="list-style-type: none"> 90+% of the annual revenue came from large existing customers. A new “lower end” product (\$200k) had failed Improved marketing targeting from “lookalikes” for more inbound leads Monitored and incentivized prospecting
Secondary Wins (Partner, Strategy, etc.)	Firm engaged our partner in multiple areas. New confidence in growth practice.	First AI win for the partner in the tough Swiss market, traditionally very conservative.	PortCo now valued at significantly higher multiple due to reignited growth.	Standing up portfolio-wide Data Warehouse and Dashboards – Now using this data in other reports.	Microsoft shop, leveraging our ability to stand up data pipeline in their own cloud.

What is Cien.ai's Biz Model?



SMB

Min. 20 GTM Team Members

\$45/mo./member

Live Sync: 1 CRM Instance
Dashboard Users: 10

Included Services:

- Standard Support
- Webinar Trainings
- Calibration Included
- Heatmap Analysis Included

Mid-Market

Min. 100 GTM Team Members

\$39/mo./member

Live Sync: Up to 2 CRM/ERP Instances
Dashboard Users: 20

Included Services:

- *SMB Plan Services*
- 2 Dedicated Team Trainings
- Push to Your Data Warehouse
- Data Correction Files
- Power BI Hosting in Your Fabric Tenant

Enterprise

Min. 300 GTM Team Members

\$35/mo./member

Live Sync: Up to 4 CRM/ERP Instances
Dashboard Users: 50

Included Services:

- *Mid-Market Plan Services*
- 5 Dedicated Team Trainings
- SLA Support
- Platform Provisioning API
- Optional Data Storage in Your Azure Cloud

Annual Pre-Pay: 20% Discount

And no increases even if team grows during the year.

Microsoft Co-Selling Certified



Tap into Pre-approved
MS Budgets (MACC)

Management Consulting

Annual

\$40k/mo.

Pool of 5 Enterprise Subs w/ no min/max GTM Team Members. Use each sub for as long/short as you like (e.g., for short "phase 0" or for long projects). Add more subs @ \$8k/mo each.

Included Services:

- All Enterprise Options
- Dashboard/API to Manage Process
- Train the Trainer
- Bi-Weekly Status Meeting
- Quarterly Top-to-Top Meeting
- 1 Exec Attendance @ Customer Event

Enterprise

Min. 300 GTM Team Members

5 Company Subs Included

Live Sync: Up to 4 CRM/ERP Instances
Dashboard Users: 50

Included Services:

- *Mid-Market Plan Services*
- 5 Dedicated Team Trainings
- SLA Support
- Platform Provisioning API
- Optional Data Storage in Your Azure Cloud

Annual Pre-Pay: 20% Discount

Microsoft Co-Selling Certified



Tap into Pre-approved
MS Budgets (MACC)

Anticipated Process:

- Define Initial Business Case & Pilot KPIs
- InfoSec & Vendor Approval
- Legal Approval
- Initiate Project, [Cien.ai](#) delivers insights quickly
- Evaluate Project Impact & Ongoing Partnership

Time Frame: 1-2 Months

White-Glove Project

Cien.ai's trained professionals aids in your or your client's GTM transformation journey during a 60 day project.

1. Data Acquisition
2. Data Calibration
3. Heatmap Analysis
4. Transformation Plan
5. Training of GTM Leadership & Line managers

Starting from \$49k for up to **300 GTM Team Members**

Data Quality Assessment

Cien.ai connects to CRM and assesses, cleans and enhances the data.

1. Data Acquisition
2. Data Cleaning & Standardization
3. ADE Dashboards with Before/After/Benchmarks

\$3.9k per CRM instance

Pilot Project - Candidate Options

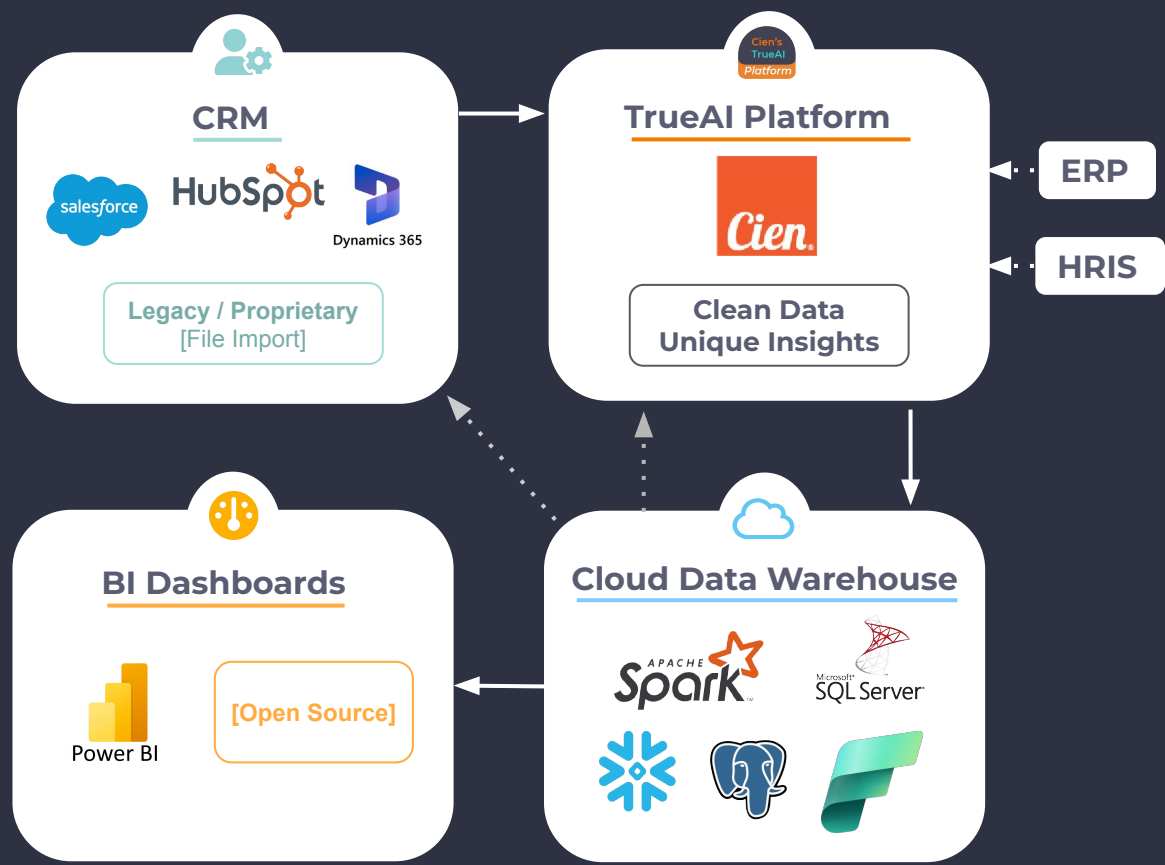
- a) Current/Recent Middle Market B2B client - using Salesforce, Hubspot or Dynamics with an active Sales Team of at least 20 Sales reps and 1 year of CRM data
- b) Internal data (Standalone business unit)
- c) Synthetic Data Set pushed into a CRM instance

- **Confirm MC Firm Project Lead**
 - Finalize Initial Business Case
 - MC Firm + Cien.ai + Client Coordination
 - Cien.ai to provide talking points, materials that can be white-labeled
- **MC Firm InfoSec, Vendor & Legal Approval**
 - Realistically this takes 1-2 months, Cien.ai has achieved approval in as little as 2 weeks.
 - Cien.ai has a comprehensive InfoSec & Vendor approval package that can be provided in advance. Cien.ai is Soc2Type2 compliant and GDPR Compliant.
 - Critical to kick off Vendor Process as soon as possible.

Item	Owner	Due Date
Define Initial Business Case & Target Pilot Client		Week 1
Kick off InfoSec		Week 2
Confirm Target Client & Pilot KPIs		Week 3
Initiate Client CRM Connection	Cien.ai	Week 4-6
Deliver Heatmap Analysis & Growth Plan	Cien.ai	1-2 Weeks post Client CRM Connection
Evaluate Broader Partnership		2-4 Weeks post Client CRM Connection

Addendum: Cien.ai Overview

How Does Cien's TrueAI Platform Work?



InfoSec Certifications



PII

(Personally Identifiable Information)
Masked Automatically



MONDAY



TUESDAY



WEDNESDAY



THURSDAY



FRIDAY



Data Acquisition

Activate the feeds

Effort: **20 min**

Potential Factors to Manage:

- InfoSec Review
- Vendor Questionnaires



ADE

(Automatic Data Enhancement)

Clean the Data

Effort: **0 min**

Potential Factors to Manage:

- None



Calibration

Make the Numbers Jive

Effort: **1 Hr**

Potential Factors to Manage:

- Delay in Required Information



Heatmap Analysis

Find & Understand The Friction Points

Effort: **1-2 Hrs**

Potential Factors to Manage:

- Missing Data Points



Growth Plan

Decide on Focus and TrueAI KPIs

Effort: **5-10 Hrs**

Potential Factors to Manage:

- Agreement on Priorities
- Internal Politics
- Resistance to Change

Example: Heatmap Locates Friction areas hindering Growth



Growth Categories	Name	Hypothesis Confirmed?	Heatmap Score ²
 Segmentation & SAM	Poorly Targeted Accounts	Disproved	65
	Poorly Populated Target Accounts	Disproved	90
	Too Small SAM	Disproved	85
 Sales & Marketing Alignment	Poor Marketing Lead Quality	Disproved	65
	Too Long Time to Lead	Disproved	65
 New Logo Selling	Poor Account Planning	Disproved	80
	Poor Pipeline Management	ND	ND
	Poor Pipeline Quality	Disproved	50
 Existing Customer Selling	Poor Pipeline Quality for Expansion Selling	Confirmed	20
	Over-Reliance On Existing Customers vs. New Logo	Confirmed	30
	Poor Cross-selling	Disproved	65
	High Churn	Disproved	50
 Rep Performance	Poorly Structured Sales Organization	Disproved	55
	Sales Org. with a Large Number of Underperformers	Disproved	60
	Unsuccessful Ramping	Confirmed	10

Growth Roadmap in Days

Quantifiable Impact Each Growth Category has multiple areas of analysis, areas in Red represent friction areas with quantifiable

Growth Categories

- SAM & Segmentation (Size & quality of target accounts)
- Sales & Marketing Alignment (Settle disputes about lead quality & follow up)
- New Logo Selling (Clear all the hurdles to land a new customer)
- Existing Customers (Keep & expand customer relationships)
- Rep Performance (Ramp and coach more reps into A-Players)

~\$4M

~\$3M

~\$7M

GTM Suite: Data That Takes You All The Way to Accelerated Growth

ADE Report

Trust Your Data

Strategic Reports

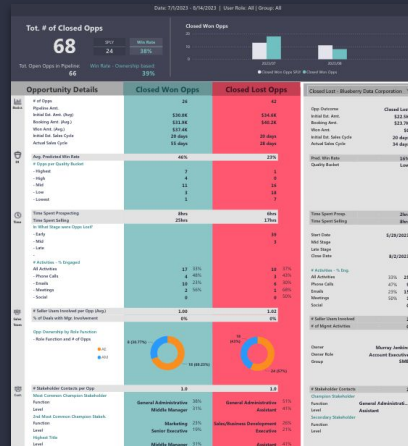
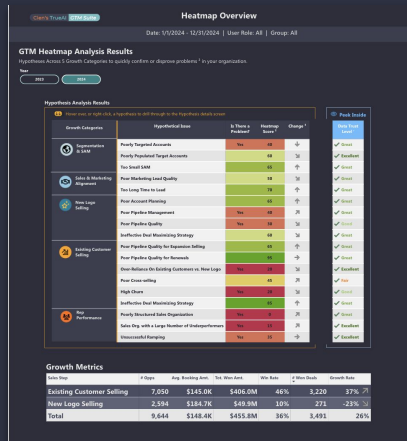
Identify Friction Points

Tactical Reports

Understand Root Causes

Management Reports

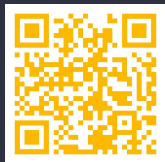
Drive Improvement



AGR | Avg. Deal Size | Revenue Concentration | Churn | Net Dollar Retention | A-B-C Players | Rep Ramping | Segmentation Industry | Lead Scoring | Segmentation GEO | Win-Loss | Pipeline Qu



Final Questions & Potential Next Steps.



Cien.ai/Resources