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**STAR Awards**

2025

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Featured Application

# Revolutionizing Value Demonstration with the Seller POV Agent

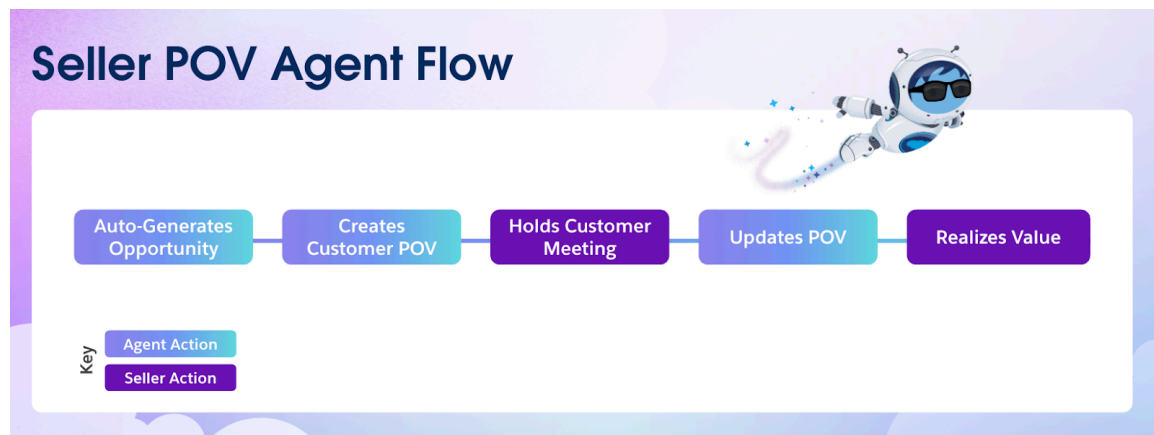
## What We Did

We created and launched a **Success Plans “Seller POV” (Point of View) Agent** – an internal tool that uses AI, Data Cloud, and LLMs to automate time-consuming sales functions—acting as a teammate to Success Plan sellers.

The Seller POV Agent moves beyond the initial sale to provide **continuous value reinforcement** throughout the customer lifecycle. It automates and enhances historically manual sales functions, including:

- **Automated Opportunity Assessment & Data Discovery:** The agent unifies and analyzes data across multiple sources using Salesforce Data Cloud, identifying Next Best Offer (NBO) pipeline growth opportunities, and driving intelligent sales actions.
- **Tailored Pitch & Value/ROI Presentation Generation:** Examining customer conversation transcripts, the agent discerns key risk categories and top customer initiatives. Based on this real-time insight, the agent auto-generates custom Points of View (POVs) to proactively tailor value messaging, address objections, and continually reinforce customer value.
- **Real-Time Adaptation and Intelligent Summarization:** Crucially, these POVs can update in real-time as customer conversations evolve, ensuring the value proposition remains consistently relevant. Additionally the agent delivers concise summaries of Accounts and Opportunities, saving valuable seller time.

By autonomously managing pre-sales tasks, the Seller POV Agent empowers our sellers to focus on what matters most: meaningful, data-driven customer engagements that proactively demonstrate and defend value.



## Salesforce Business Impact

We’ve seen immediate business impact since launching the Seller POV Agent including increased pipeline, increased seller productivity and efficiency, and improved customer satisfaction.

- **Pipeline Growth:** Seller POV Agent has contributed to significant pipeline growth, responsible for 24% (\$80M) of total Success Plan auto-generated pipeline in Q1 FY26 alone, accounting for 21% of the team's total growth.
- **Seller Productivity and Efficiency:** A strategic tool for accelerating deal closure, the Seller POV agent saves Success Plan sellers 3-5 hours (25-35%) of work per opportunity by automating pre-sales legwork including opportunity identification and personalized pitch creation.
- **Improved Customer Satisfaction:** The agent's data-driven prioritization, engagement tracking, and identification of risks and initiatives enables our sellers to have more targeted, meaningful conversations that reinforce the value of their investment, improving overall customer satisfaction.

## Customer Impact

The design of the Seller POV Agent is inherently customer-centric, ensuring the value we message aligns with the customer's needs and business goals.

- **Dynamic Value Alignment:** Using ongoing conversation transcripts, the agent identifies customer challenges and priorities and surfaces them to the sellers through tailored POVs. This ensures the value proposition remains relevant throughout the customer lifecycle.
- **Customer Feedback Loop:** By analyzing customer conversation transcripts, the agent acts as a continuous feedback loop, sharing insights to help sellers refine the customer value prop.
- **Personalized and Proactive Engagement:** Customers receive compelling, personalized pitches and value/ROI presentations, allowing for deeper and more meaningful data-driven conversations that highlight the most relevant and valuable features for their success. This customer-centric approach, supported by real-world case studies and benchmarks, strengthens relationships and solidifies customer confidence in their investment.

## Execution and Implementation

We first launched the Seller POV Agent to a subset of sellers so we could learn from their experience and refine the agent. Now we're looking to broaden our audience, making it available to all Sales, Customer Success, and Account teams.

- **Workflow Integration:** Knowing adoption increases when tools are available in the flow of work, we embedded the agent directly into the workflows of our sales, customer success, and account teams. This ensures our teams are using the agent and drives alignment with opportunity assessment, data discovery, and POV generation.
- **Messaging Alignment:** The agent provides pre-built, personalized, and data-backed value content, ensuring messaging and communication from various account team members is cohesive.
- **Continuous Refinement:** As an AI and LLM powered agent, it is always learning and refining. By processing customer conversation data and observing POV outcomes, the Seller PV agent enhances its ability to identify risks, prioritize initiatives, and craft more effective value propositions. Our next step to increase adoption is to modify the UX and place the Seller POV agent directly on the Opportunity Insights widget to increase visibility and action.



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