

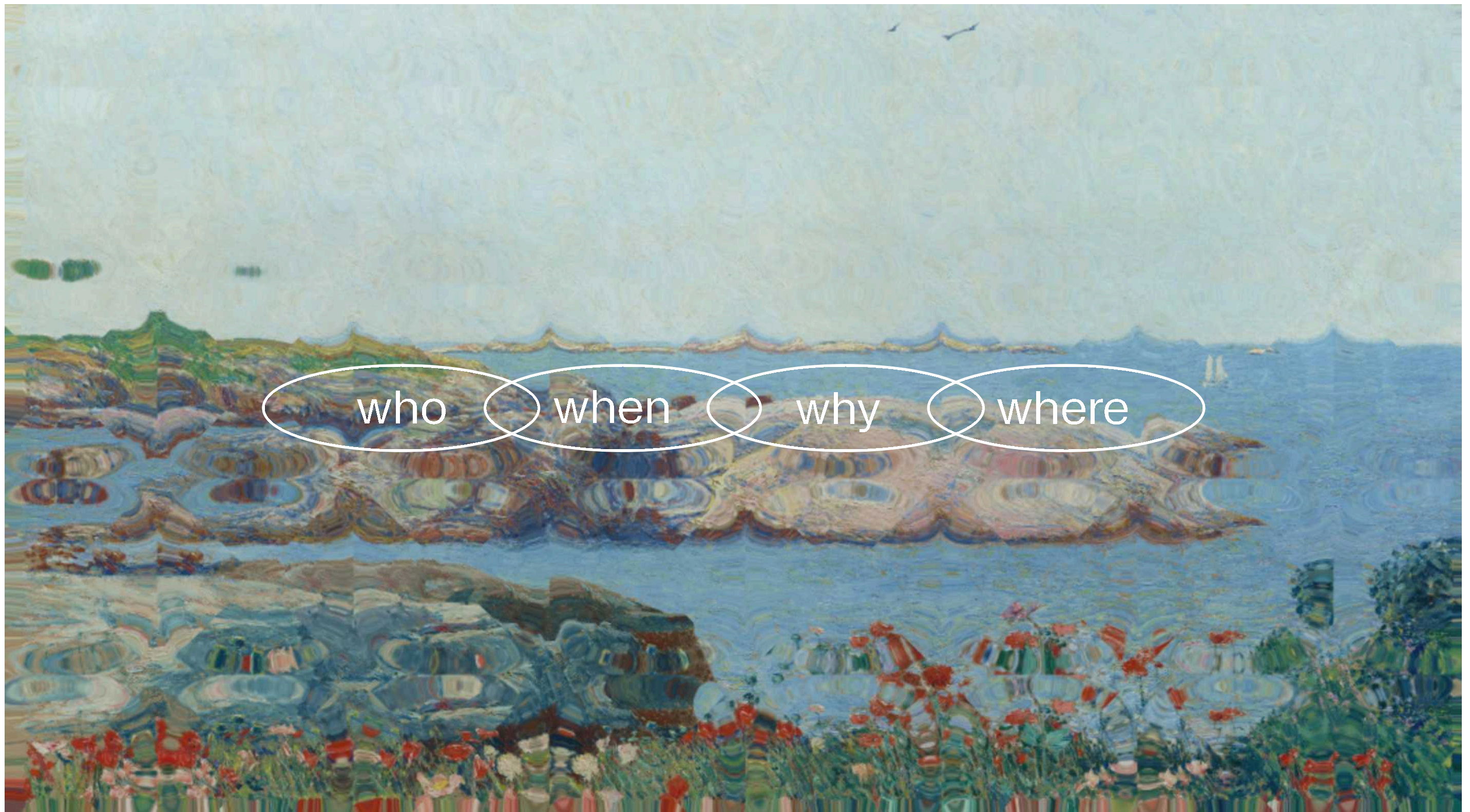
backstory.ai



*See how Backstory turns every email, meeting,
and call into the who, when, why, and where
behind your deals.*

*Knowing more means winning more, especially in
complex selling motions*

Know More.



Knowing more means to not just see the full picture, but to actually *understand the details.*

Backstory is the context layer for your business; giving revenue stakeholders a clearer view of what's actually happening by providing a deeper, more detailed understanding of all the moving parts. Sales reps, managers, and executives require more than just data, they need a thorough understanding of the who, what, when, where, and why behind every deal. Accurate, well-informed decision-making depends on knowing more, Backstory provides that knowledge.

Know Who

By knowing who, teams can address roadblocks, resolve operational friction, and mitigate risks before they escalate into costly setbacks.

Knowing who to engage to solve issues before they cause financial losses.

Identifying the key stakeholders, decision-makers, and subject matter experts early in the process ensures that critical risks are escalated to the right individuals immediately. Backstory cuts through the noise and calls out stalling champions, ghosting economic buyers and inaccurate reporting from reps. Ask the Backstory agent for an update about any player involved in the deal and get back a robust response that goes beyond just an engagement number.

Backstory captures every email, meeting, and call automatically and matches it to the right person, so each stakeholder has a living engagement score as well as a record of interactions with your team. It maps the full buying group by title and function, showing who's engaged, who has gone quiet, and who has never been contacted. That includes the person who actually signs.

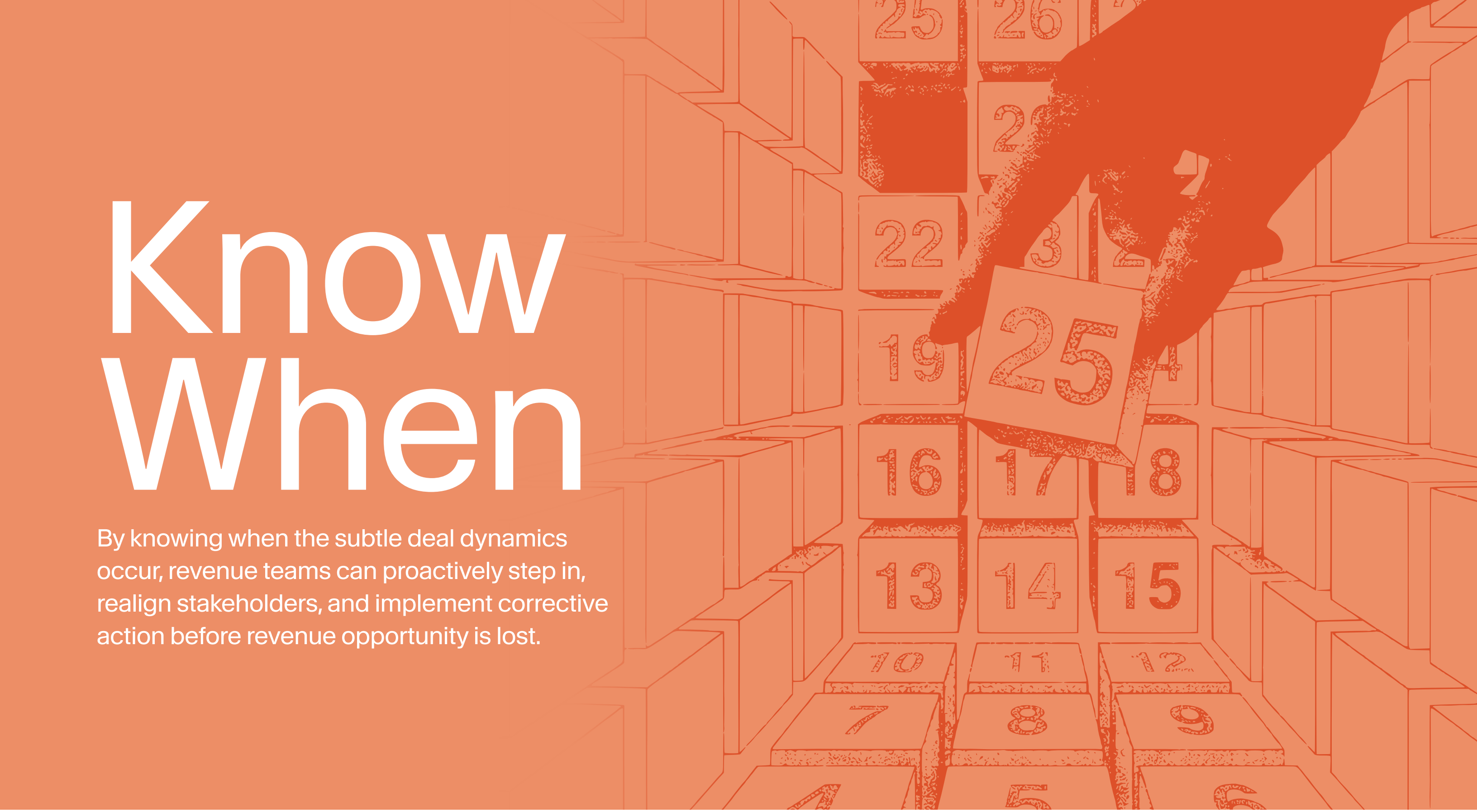
BACKSTORY EXAMPLE

Who should we be talking to on Meridian that we aren't?

The deal runs through one person, and the person who signs has never been contacted.

- **Elena Vasquez**, VP Field Ops · Score 74 · 33 of 47 activities. She is the champion, but 71% of all activity is with her.
- **Martin Feld**, CFO · No score · No contact on record. On Jun 18, Elena said anything over \$250K needs CFO sign-off, and this deal is \$512K.
- **Priya Nandakumar**, Director IT Security · Score 4 · Added to a thread Aug 28 and never contacted.
- **Rachel Ostrowski**, Procurement · Score 2 · One unanswered email, Sep 9.

So, three of the people who can stop this deal have no relationship with your team.



Know When

By knowing when the subtle deal dynamics occur, revenue teams can proactively step in, realign stakeholders, and implement corrective action before revenue opportunity is lost.

Knowing when the deal is slipping in real time rather than when reported.

Real-time visibility into the pipeline enables revops, sales leaders, and account executives to detect deal risks, milestone delays, and shifts in buyer sentiment immediately. Backstory eliminates the lag associated with manual, end-of-week rep updates or post-mortem pipeline reviews. By capturing real-time engagement indicators in Backstory Deal Summaries, potential risks and actionable solutions are identified and delivered straight to you before you even have that first sip of coffee.

Backstory captures activity continuously from email, calendar, and meeting tools, and reps don't have to log anything. When engagement drops, Backstory sees it the day it happens, not at the next pipeline review. Deal Summaries compare each deal against its own recent trend and flag what's missing: a meeting that never got scheduled, a close date approaching with no activity behind it, or a follow-up that went unanswered.

BACKSTORY EXAMPLE

Meridian Deal Summary

Meridian FY27 Expansion · \$512K · Stage 4 (Proposal) · Commit · Close Oct 23

Opportunity Engagement Level: 34, down from 82 thirty days ago

Last champion meeting: Aug 24, 23 days ago

Next meeting scheduled: None

Most recent activity: Outbound email Sep 9. No reply.

Potential Risks

- **Engagement Collapse.** Activity fell by more than half in 30 days, five weeks before close.
- **Late Blockers.** Security and procurement both surfaced in the last three weeks.



Know Why

By knowing why with deep, context-rich insights into buyer dynamics, sales leaders and revenue teams address obscured objections and win back momentum before the deal is lost.

Knowing why the champion decided to get cold feet without even needing to ask.

Understanding the actual reasons behind any revenue change transforms uncertainty into actionable intelligence. Backstory analyzes key stakeholder turnover, internal rep skepticism, and even competitor mentions to reveal the real motives behind a deal's sudden stall or shift in buyer sentiment. View these detailed, actionable stories directly in your forecast rollups, on deal/account pages or within a Backstory Sheet.

Backstory reads what was actually said in calls and emails, so a risk comes with its cause attached. That might be a competitor named on a call, a sign-off rule mentioned once and never acted on, or a reorg on the customer's side. Risk Headlines group these causes across the forecast, and each one is sourced to the meeting, the stakeholder, and the dollars at stake.

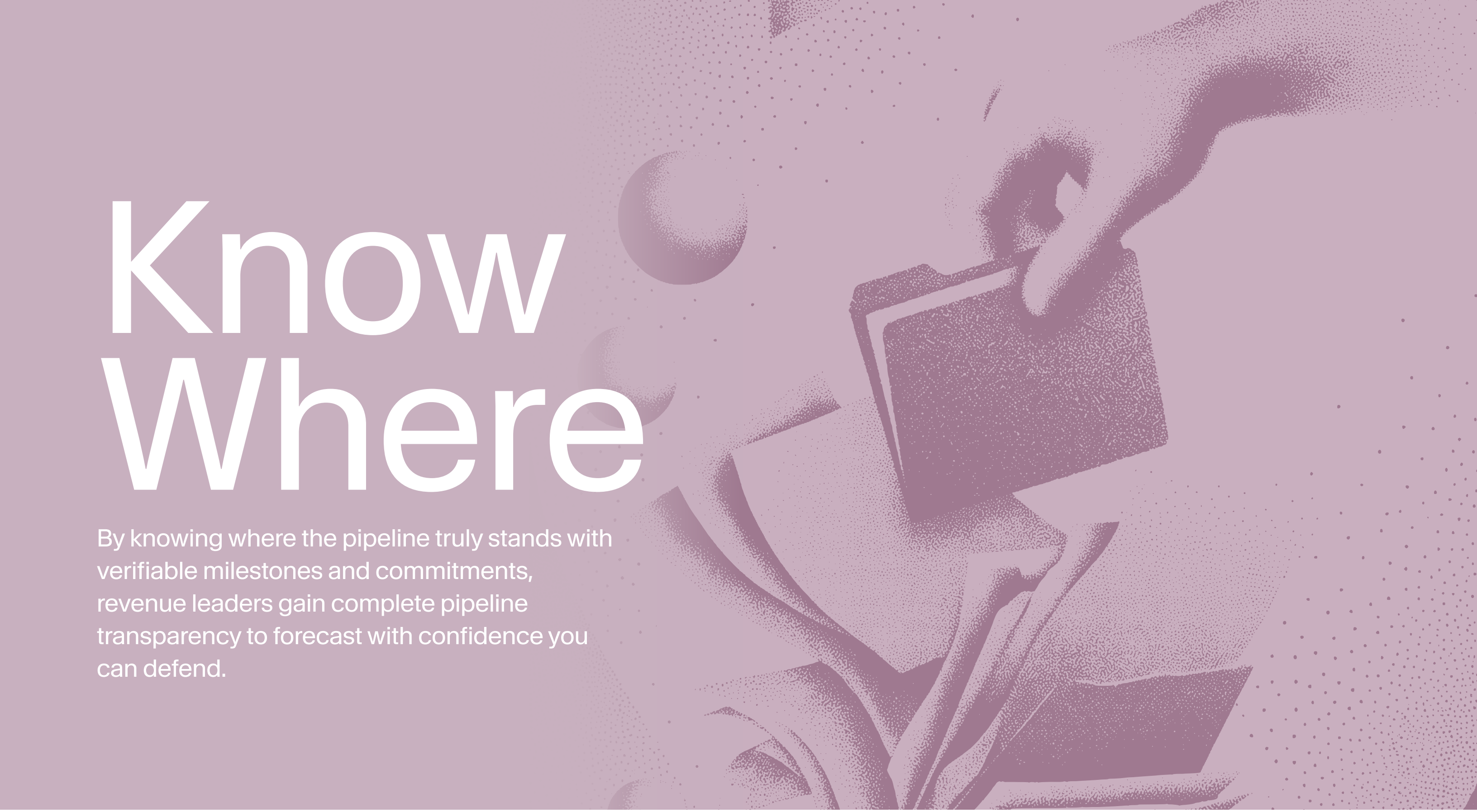
BACKSTORY EXAMPLE

Why did Meridian's champion go quiet?

The silence likely isn't related to the rep. Engagement is strong but, Meridian is in the middle of an organizational upheaval.

- **Organizational Changes.** On **Sep 2**, Meridian announced a restructuring of EMEA field operations. Public filings confirm roughly 600 roles are affected, and Elena Vasquez's org is in scope.
- **Competitive Evaluation.** On an **Aug 5** call, Elena said Northwind Analytics is being evaluated for the EMEA scope. This isn't recorded in the CRM but surfaced from the call intelligence.

So, the champion may be fighting for her own budget, or her own role. **Another follow-up email won't fix that, but an executive-to-executive conversation might.**



Know Where

By knowing where the pipeline truly stands with verifiable milestones and commitments, revenue leaders gain complete pipeline transparency to forecast with confidence you can defend.

Knowing where the deals are in the pipeline based on the evidence, not best guess.

Accurate pipeline tracking requires moving beyond rep optimism and subjective forecasts to ground deal placement in objective, verifiable buyer behavior. Backstory establishes a baseline for deal progression by evaluating real-time engagement signals: email responsiveness, meeting participation, and multi-stakeholder involvement. Indicators about deal status are abundant, but delivering them to key stakeholders in a timely manner remains a challenge, Backstory solves this

by becoming the source of truth, no matter where the deal signals are at. Backstory scores every opportunity against your sales methodology, and each line is backed by a real meeting or email rather than a rep's checkbox. It learns instantly, from two years of your deal history, how each stage actually behaves in your specific business. That lets it show when a deal's stage and forecast category are ahead of the evidence, and what those deals usually do next.

BACKSTORY EXAMPLE

Meridian Scorecard & Stage Discrepancy

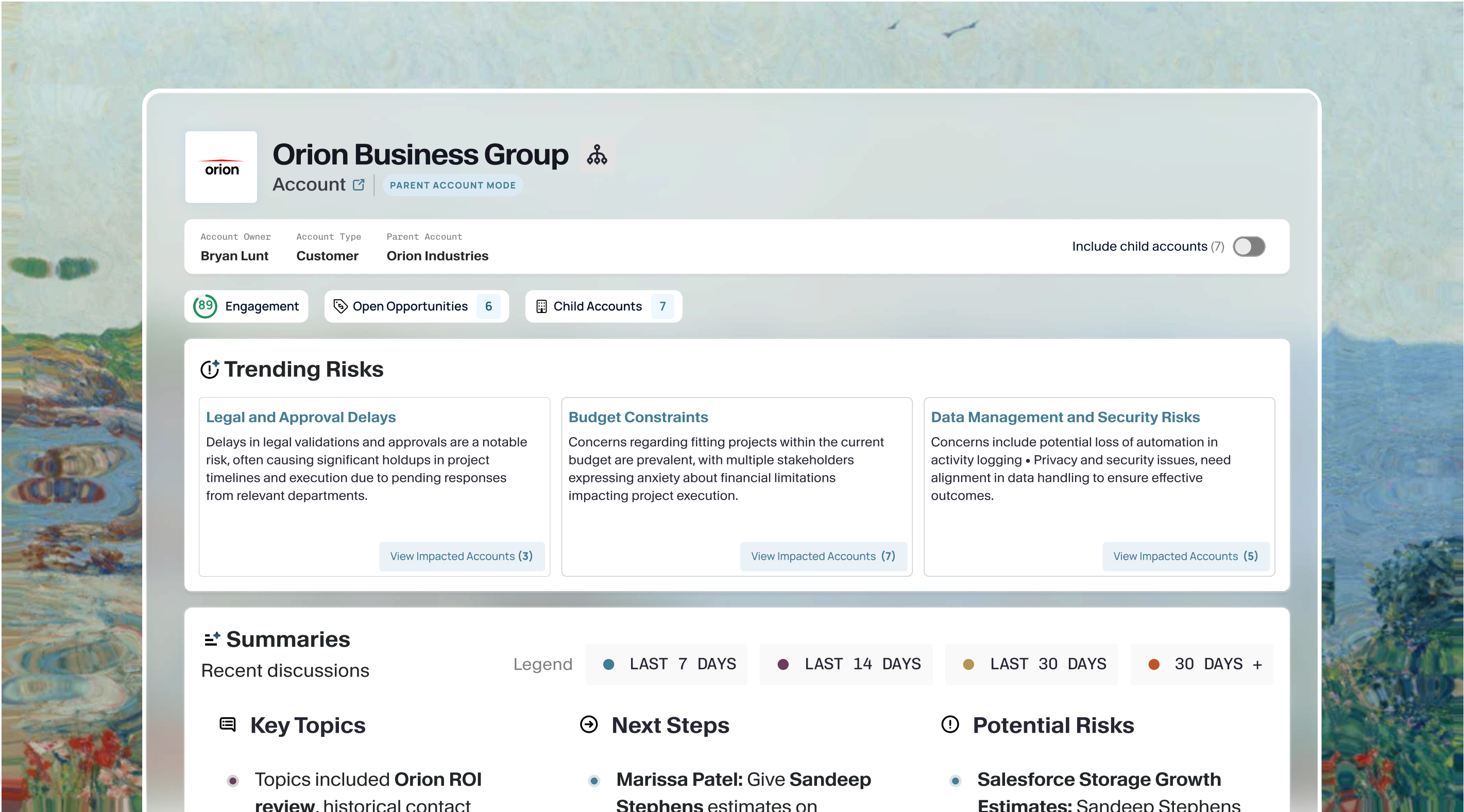
Meridian FY27 Expansion: Stage 4 (Proposal) in the CRM, **not** in the evidence
Scorecard: 21.4% · **Predicted:** Yellow · **Account Health:** Yellow

Evidence supports: Technical validation completed Jul 9 · Decision Criteria documented

Evidence doesn't support: Economic Buyer (blank; one meeting, May 14) · Decision Process (blank) · InfoSec (Pending Approval) · Procurement (not engaged)

So, the deal is forecast as Commit, but it has the profile of a deal that hasn't been qualified yet.

Across your pipeline, Stage 4 deals without completed validation win at 22%, compared with 58% for deals that complete it.



You're not getting the answers you need.
And *you know it*.

Backstory connects the signals scattered across your business to give leaders a complete, trustworthy picture of what's happening—and what to do next.

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