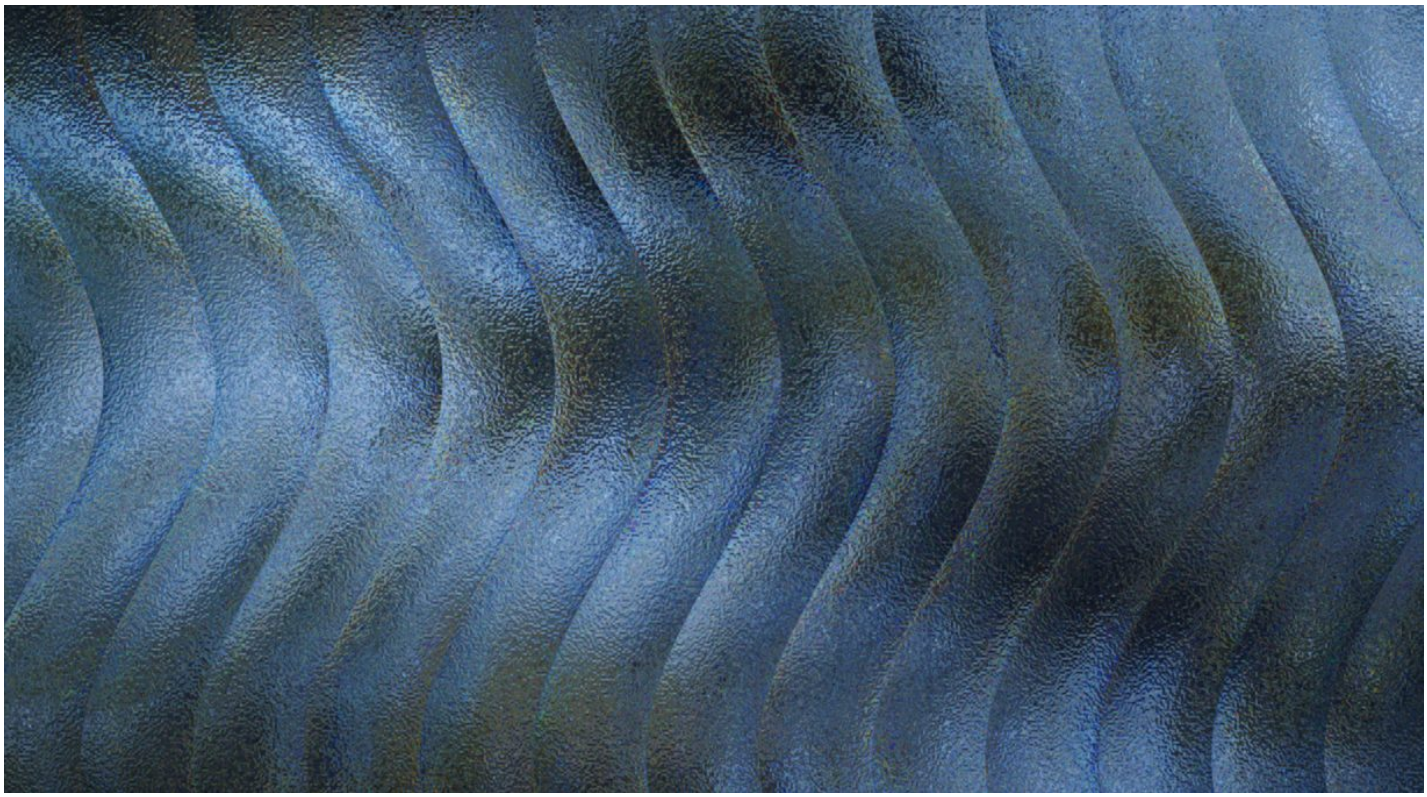
backstory.ai

FOR REVENUE OPERATORS

Run the business on
answers the team trusts.

Backstory for *RevOps*



Catch the gap *before* the forecast call, not during the post-mortem

Every quarter ends with some version of the same post-mortem. A deal sat in Commit, the customer had gone quiet weeks earlier, and nothing in the CRM changed until the close date passed. The signal was there. It never reached a field anyone was reporting on. RevOps is left reconciling rep judgment against a record that trails the customer, across hundreds of open deals at once. Backstory reads the activity behind every opportunity and sets it next to what the CRM says, so the gap between the two is visible and measurable across the whole pipeline before the forecast call. Every answer links back to the email or call it came from, so the numbers you bring into the room can be checked.

From reconciling opinion to running on *evidence*

The CRM is a trailing indicator. It records where a deal was, in a stage, an amount and a close date, not what is happening with the customer now. Commit is a rep's judgment, and nothing forces that judgment to move when engagement does.

Backstory builds one true account of every customer from everything that happens with them. Every email, meeting and call is matched to the right person, account and deal, so RevOps can see which parts of the forecast are evidenced and which are asserted.

How it works for RevOps

Runs on your rules

You tune how activity is matched to accounts, deals and people to fit how your company is actually organized. It runs from Salesforce or your data warehouse.

Answers from facts

Every interaction is broken into individual facts, like "legal flagged a security review." One call can produce up to 200 of them, and a busy deal holds 5,000 to 10,000.

Shows its work

Every fact links to the email or call it came from. Signals are read against deal size and history, so two weeks of silence on a $2M deal weighs differently from the same silence on a $50K deal.

Feeds any AI you choose

Structured customer facts go to Claude, ChatGPT, Microsoft Copilot, Amazon Quick or your own agents. Switch models and your context moves with you.

What it takes to get started

2–4 weeks

Most teams are live in this window, with no ramp period.

2 years

of deal history analyzed on day one, so answers are ready immediately.

0 new fields

for reps to log. Activity is captured from the tools they already use.

Connects To:



Commit looks solid until you check *who's actually engaging*.

The forecast call runs on Commit. This answer separates the Commit dollars customers are engaging on from the dollars held up by a rep's judgment.

BACKSTORY AGENT — MERIDIAN DEMO DATA

How much of the forecast is backed by real activity vs. rep opinion?

About two thirds of Commit is defensible. The rest is assertion.

- **34% of Commit dollars have had no engagement activity in 14 days.** That's $4.11M of the $12.10M in Commit at Executive Level. Outbound-only activity doesn't count here; the test is whether the customer engaged back.
- **Category isn't tracking engagement.** Nine deals sit in Commit with an engagement score below 40. Meridian is the largest at $512K, having fallen from 82 to 34 in thirty days without changing forecast category.

That second point is the one to carry into the forecast call. Commit is a rep's judgment, and nothing currently forces that judgment to move when the underlying engagement does.

So: the forecast isn't wrong, it's unevenly sourced. A third of it is asserted rather than evidenced, with no mechanism catching the difference.

SOURCES: 30 DAYS OF ACTIVITY ACROSS 4 TEAMS AND 41 OPPORTUNITIES, THROUGH SEP 16

Show me the worst offenders by team.

Commit dollars with no engagement activity in 14 days, by team.

TEAM	COMMIT	UNEVIDENCED	SHARE
North America West	$4.60M	$1.94M	42%
EMEA	$3.20M	$1.15M	36%
North America East	$2.85M	$0.71M	25%
Key Accounts	$1.45M	$0.31M	21%

North America West is both the largest commit and the least evidenced, and it's the team closest to its number. Its three largest unevidenced deals — Meridian ($512K), Kestrel Marine ($455K), and Vantiv Rail ($325K) — all appear in the single-threading pattern too.

Unevidenced and single-threaded are mostly the same deals.

The stage gates exist on paper. *Deals skip them anyway.*

Stage gates exist in process but are rarely enforced in the system. This answer finds the gate that gets skipped and puts a win rate on it.

BACKSTORY AGENT — MERIDIAN DEMO DATA

Which stage gates are reps skipping, and does it matter?

One gate is skipped routinely, and it's the one that predicts outcomes.

- 41% of deals reaching Stage 4 — Proposal have no completed technical validation. The gate exists in process and is not enforced in the system.
- Those deals win at 22%. Deals that complete it win at 58%. Same stage, same categories, roughly two and a half times the win rate.

Currently live: Pinnacle Rail Expansion sits in Stage 4 at $270K with no validation on record. Meridian completed validation on Jul 9 but carries a blank Economic Buyer, so it clears one gate and fails another.

So: yes, it matters, and the cost is measurable. Validation is worth roughly 36 points of win rate and it's currently advisory.

SOURCES: 18 MONTHS OF CLOSED OPPORTUNITIES AND 41 OPEN, THROUGH SEP 16

Quantify the win rate impact.

GATE	MISSING ON	WIN RATE, SKIPPED	COMPLETED	GAP
Technical validation	41% of Stage 4+	22%	58%	36 pts
Named economic buyer	29% of Commit	31%	54%	23 pts
InfoSec review opened	18% of Commit	38%	57%	19 pts

Applied to current pipeline. $4.98M of open Commit and Best Case is sitting past a gate it never cleared. At the observed win rates, roughly $1.4M of expected value lost against what the same dollars would produce if the gates were enforced.

Caveat worth stating in the QBR: this is correlation on 18 months of history, not a controlled comparison.

Best Case is full, but *the upside isn't moving*.

Best Case is where next quarter comes from. This answer separates upside waiting on the customer from upside waiting on process.

BACKSTORY AGENT — MERIDIAN DEMO DATA

Where is upside getting stuck across the engine?

FORECAST HEADLINES · EXECUTIVE LEVEL · BEST CASE

$3.18M of the $4.72M in Best Case is blocked on something structural rather than on the customer's decision.

Upside Without Executive Sponsorship — $1.68M · 6 opps

No senior stakeholder identified at all. Ardent Biotech and Helix Diagnostics are the largest, both in validation.

Stage Advanced Without Validation — $960K · 4 opps

Moved to Proposal with the validation field empty. Pinnacle Rail Expansion anchors at $270K.

No Activity in 30+ Days — $540K · 3 opps

Westmark Utilities has been untouched 34 days while still carried as upside.

So: two thirds of best case isn't waiting on a buyer, it's waiting on us. These are process states, not customer states, which makes the number more recoverable than it looks and less real than it's being reported.

SOURCES: 30 DAYS OF ACTIVITY ACROSS 14 BEST CASE OPPORTUNITIES, THROUGH SEP 16

Show me what's blocking it.

Upside Without Executive Sponsorship — $1.68M across 6 opportunities.

RISK DETAILS

- Helix Diagnostics Platform ($410K, Delacroix) is in Stage 3 — Validation with no contact above manager level on record.
- Ardent Biotech ($385K, Ashgrove) has no executive sponsor identified and a scorecard at 12.5%.

NEXT STEPS

- Sponsorship requirement added to Best Case entry criteria, not just Commit.
- Six opportunities flagged for the next pipeline call with their owning managers.

PATTERN

- Five of the six are new logos. The gap is in how new-logo deals are qualified on entry, not in how they're worked afterward.

An entry-criteria problem, so a process fix rather than a set of individual saves.

Learn more

The companies that know AI best *choose Backstory*

AMD · Red Hat · IBM · OpenAI · paloalto NETWORKS

What our customers are saying

"For a company our size, if you multiply those time savings across every rep and manager globally - Backstory *basically pays for itself* before you even count the deals caught earlier."

Reagan Lucas · Sales Process Coach, AMD

50%+

higher win rates on deals with 70%+ MEDDPICC completion.

CUSTOMER RESULT · RED HAT

3–5x

more VP+ engagement on won deals than on lost ones.

BACKSTORY LEADERSHIP WORKFLOW ANALYSIS

20+ min

saved per rep per day when every interaction is logged without manual entry.

BACKSTORY ACTIVITY CAPTURE

4.5/5

630 reviews on G2



Security and governance

CERTIFIED	CERTIFIED	ACCESS	MODELS
SOC 2 Type II	ISO 27001	Zero standing access	No customer data used to train models

NEXT STEP

See the answers Backstory gives RevOps, on your own pipeline

backstory.ai/demo backstory.ai/role/revenue-operations