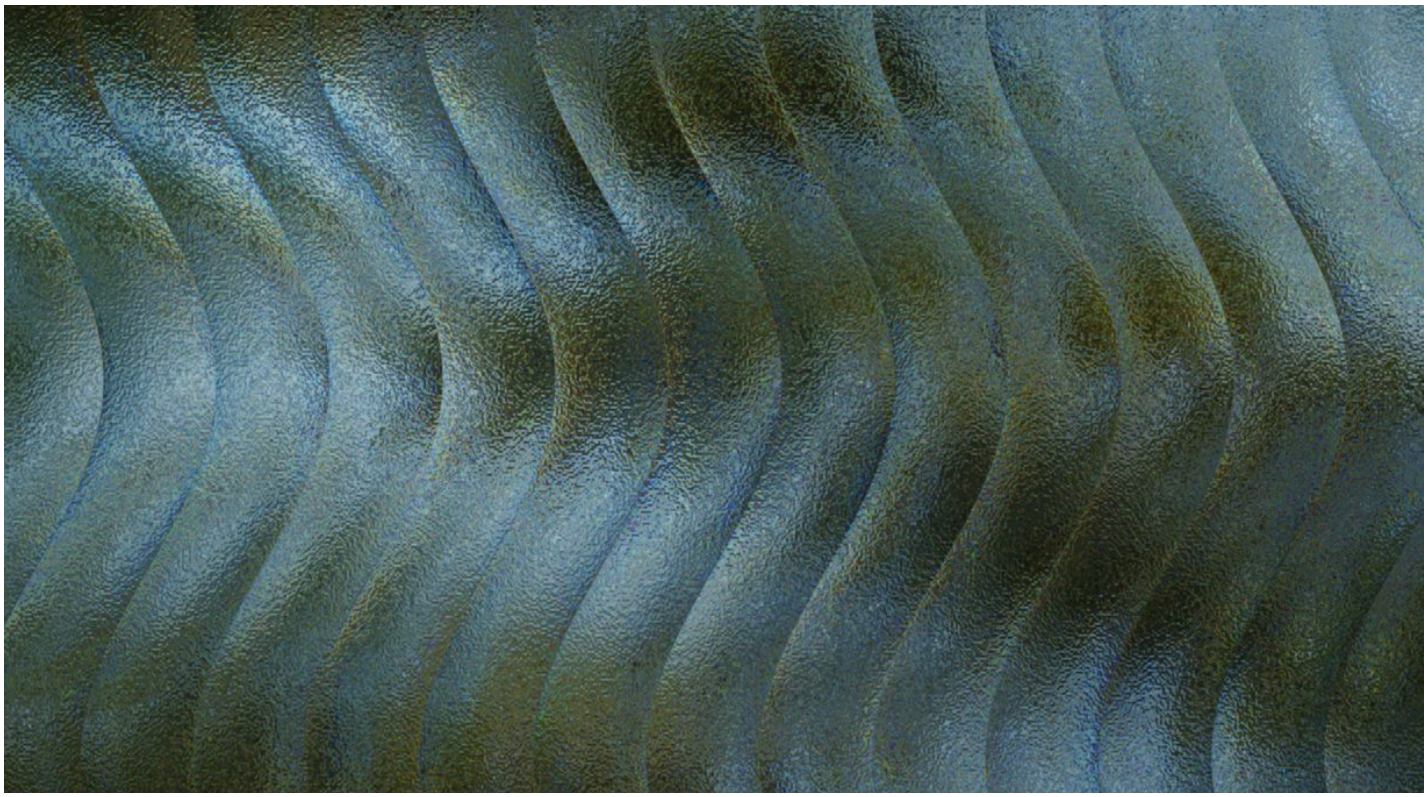
backstory.ai

FOR SALES LEADERSHIP

Drive predictable revenue with unbiased deal intelligence.

Backstory for *Sales Leaders*



Six minutes into the 1:1 and you're *still* chasing the truth

Most managers spend 20 to 30 minutes preparing for every 1:1, pulling deal status from Salesforce and rereading notes. That is detective work, not coaching prep. Then the conversation runs on the rep's narrative, because Salesforce fields show what was updated, not who was contacted, when, or what moved as a result. Backstory gives you the deal context before you walk in, built from the actual activity rather than a summary your rep prepared. Prep drops to five minutes. The first fifteen minutes of every 1:1 go to what the data shows, and the rest goes to coaching on exactly what is missing and why.

From taking the rep's word to coaching on *what happened*

The CRM shows what reps chose to enter. There's no time to sit in on every call, so pipeline reviews run on the rep's read of the deal, and coaching stays generic. The slip shows up after it's too late to change it.

Backstory captures every email, meeting and call and matches it to the right deal, so you see every deal risk, not just the one that came up on a call. The forecast you submit is one you can show the evidence for.

How it works for Sales Leaders

Sees every deal

Activity is captured automatically from the tools reps already use, so the picture is complete whether or not the CRM was updated.

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.

Shows who's missing

Backstory maps every stakeholder: who's engaged, who's gone quiet, and who has never been contacted, including the people who never join a call.

Coaches from evidence

Tailor 1:1s with real relationship and engagement metrics for each rep, so the conversation starts from what happened instead of anecdote.

What it takes to get started

2–4 weeks

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

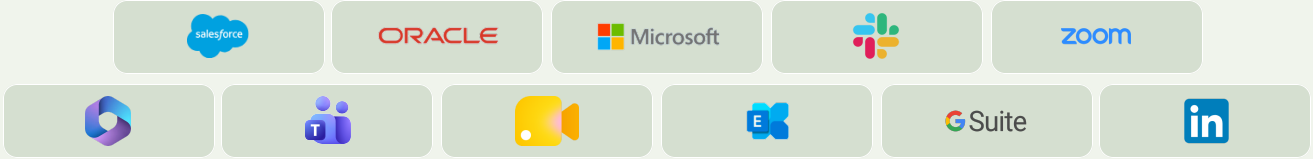
2 years

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:



SALES LEADERS WITH BACKSTORY

The deals holding up your commit *have problems*.

The forecast call asks you to stand behind Commit. This answer shows which of those deals carry a flagged risk, and which carry none.

BACKSTORY AGENT — MERIDIAN DEMO DATA

What's likely to slip in commit?

FORECAST HEADLINES · NORTH AMERICA WEST · COMMIT

$2.47M of your $4.60M commit has a flagged risk, against a gap to quota of $390K.

Single-Threaded Champions — $1.29M · 3 opps

Meridian's champion has been silent 23 days during a customer restructuring, and Vantiv's sole contact left the company Aug 30.

Security Review Not Started — $698K · 2 opps

Corbin Aerospace has never had its InfoSec status populated. Meridian's is Pending Approval with no direct contact made to the reviewer.

Repeatedly Slipped Close Dates — $480K · 2 opps

Bellweather Energy's close date lapsed Sep 4 after slipping twice. Halberd has had legal redlines outstanding 19 days.

So: you're $390K short and the deals holding you up are worth six times that. Three deals carry no flagged risk at all: Northgate, Atwater, and Redmond, together $1.21M.

SOURCES: 30 DAYS OF ACTIVITY ACROSS 12 OPPORTUNITIES, THROUGH SEP 16

Elaborate on the biggest risk.

WHAT WAS ACTUALLY SAID

- **Elena Vasquez, Aug 24:** asked whether the EMEA seat count could be split across two fiscal years, nine days before the restructuring was announced.
- **Tom Bergeron, Aug 24:** confirmed rollout planning is finished for the North America scope.

WHAT THIS CHANGES

- Meridian may not be one $512K decision. It's a $290K North America rollout that can close this quarter and a $222K EMEA scope that probably can't. Nobody has put that option to the customer.

THIS WEEK

- Dana Whitfield takes the phased structure directly to David Kwan.
- Ravi Menon escalates to Vantiv's procurement contact rather than waiting for a named replacement.

The phased split converts an at-risk $512K into a likely $290K, and it came out of a meeting nobody revisited.

SALES LEADERS WITH BACKSTORY

The rep says it's on track. *The record says otherwise.*

Meridian is the largest deal in your commit. This answer separates the work that's been done from what's missing and what changed underneath it.

BACKSTORY AGENT — MERIDIAN DEMO DATA

Can I actually trust that Meridian is going to close?

The work is real. The deal isn't closeable on its current path.

STRONG

- Customer-initiated in April. Technical validation completed Jul 9, positive.
- 47 activities across 164 days. Nobody has been lazy here.

MISSING

- Economic Buyer and Decision Process both blank. Scorecard 21.4%.
- One meeting with David Kwan, the economic buyer, on May 14. Nothing in four months.
- Martin Feld, CFO, never contacted. On a Jun 18 call Elena Vasquez said anything above $250K needs his sign-off. This deal is $512K, closing Oct 23.

CHANGED UNDERNEATH IT

- Engagement fell from 82 to 34 in thirty days. No meeting since Aug 24, none scheduled.
- Meridian announced a restructuring of EMEA field operations Sept 2. Public filings confirm roughly 600 roles affected, including Elena's org.

So: not as it stands. A deal that was on track until the customer's org moved underneath it, with a buying group never built wide enough to survive that.

SOURCES: 33 EMAILS AND 14 MEETINGS THROUGH SEP 16

Show me who we've never talked to.

Six people in the buying group. Two are engaged.

STAKEHOLDER	SCORE	STATUS
Martin Feld · CFO	–	Never contacted. Highest buying power.
Priya Nandakumar · Director IT Security	4	Never contacted. InfoSec Pending Approval.
Rachel Ostrowski · Procurement Lead	2	Surfaced Sept 4. One unanswered email Sept 9.
David Kwan · SVP Operations	12	One meeting, May 14.
Elena Vasquez · VP Field Operations	74	Engaged. Silent 23 days.
Tom Bergeron · Manager Service Delivery	68	Engaged. No budget authority.

Two of the four unengaged can stop this deal outright. Neither has met anyone on your team.

Coaching stays generic *without the pattern*.

One bad deal is an inspection. The same gap across three losses is a coaching conversation. This answer finds the rep and the pattern.

BACKSTORY AGENT — MERIDIAN DEMO DATA

Which rep needs my help most this week?

Dana Whitfield. Not because of Meridian specifically, but because Meridian is the third instance of the same pattern.

- **Coverage.** 2.1 engaged stakeholders per deal against a team average of 3.8. Three of her four open deals are single-threaded.
- **Qualification.** Economic Buyer blank on Meridian and Pinnacle Rail. Pinnacle advanced to Stage 4 — Proposal without technical validation.
- **The pattern.** All three of her last three losses closed without a single economic-buyer meeting.

So: this isn't a Meridian conversation, it's a qualification-discipline conversation that Meridian happens to be expensive enough to force.

SOURCES: 4 OPEN OPPORTUNITIES AND 3 CLOSED-LOST, THROUGH SEP 16

Give me the coaching plan.

Open with the pattern, not the deal. Three losses, zero economic-buyer meetings in any of them, and the same gap now on a $512K commit deal. Meridian becomes the example rather than the accusation.

THIS WEEK

- First contact with Martin Feld before the Oct 23 close date.
- Direct outreach to Priya Nandakumar to open the InfoSec review.
- Economic Buyer populated on Meridian and Pinnacle Rail.

THE STANDING CHANGE

- No deal advances past Stage 3 — Validation without a named economic buyer who has met someone.

"Your activity is high and your coverage is thin. Those are different problems and you only have one of them."

Learn more

The companies that know AI best *choose Backstory*

AMD · Red Hat · IBM · OpenAI · paloalto NETWORKS

What our customers are saying

"With Backstory, you can actually see where people are spending their time, are they single-threaded or not, and what the quality of their interactions are. *It's one thing to diagnose, it's another thing to cure.*"

Pluralsight · Customer story

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

NEXT STEP

See the answers Backstory gives sales leaders, on your own pipeline

backstory.ai/demo backstory.ai/role/sales-leader