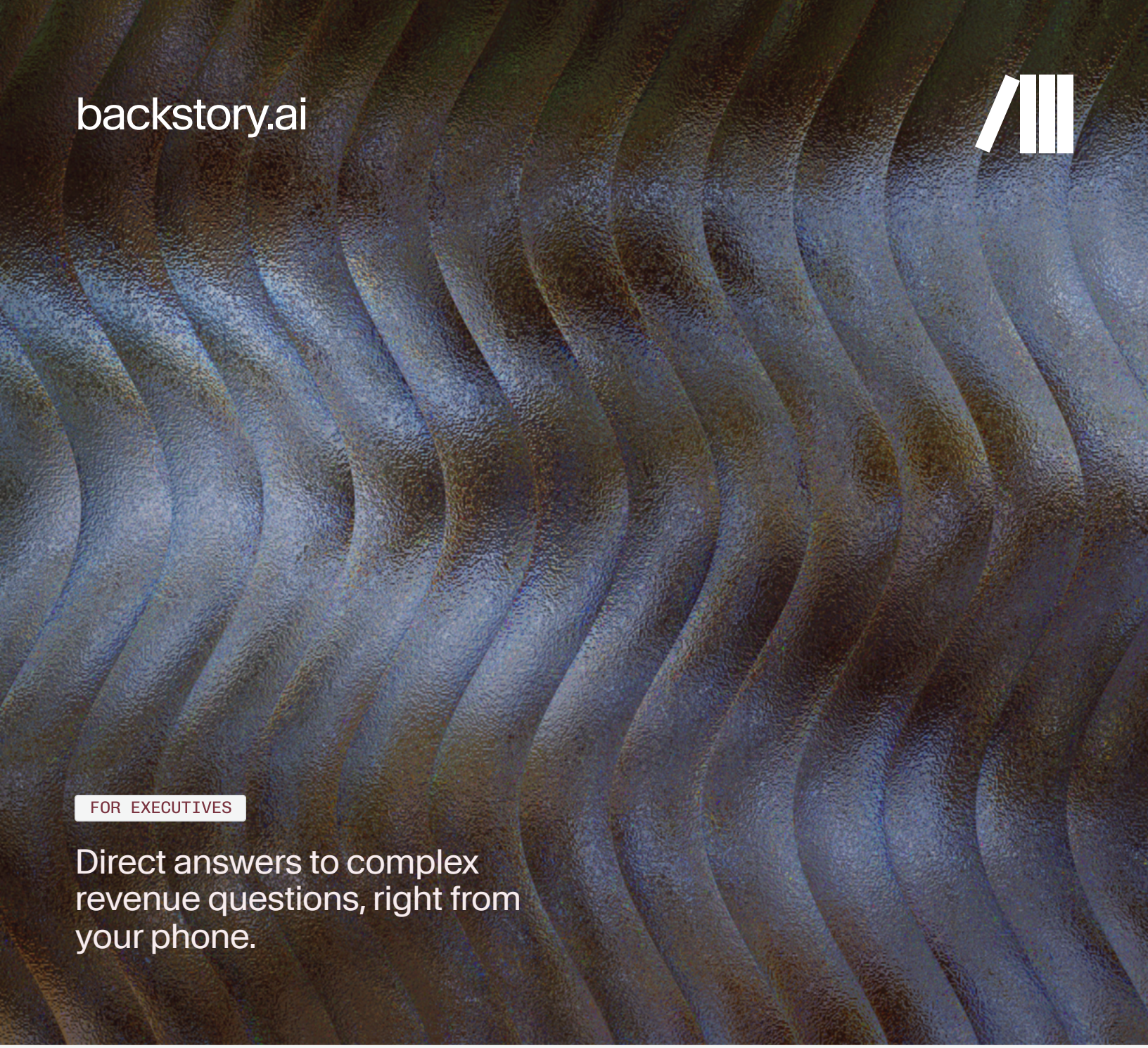
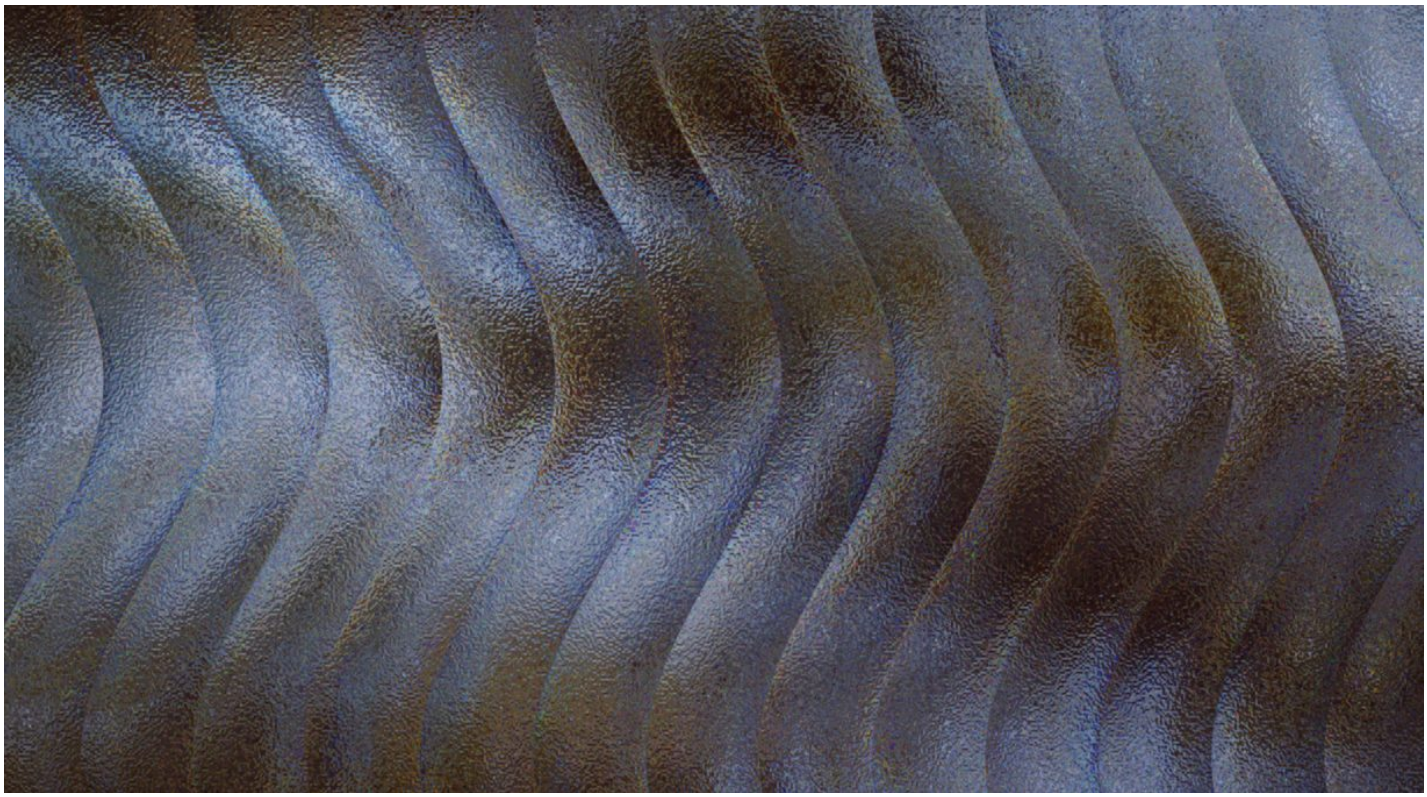


Backstory for *Executives*



This is the year your AI bets get judged *on results*

Most revenue AI pilots stall for the same reason: nobody trusts the answers enough to act on them. Boards are now asking which AI spend is paying back, and pilots that can't show results lose their budget. No one yet knows how work will split between people and agents, or which models you'll run next year. One thing holds through all of it: people and agents both depend on knowing what is really happening with your customers. Backstory gives every leader that foundation, so you can see which top accounts are deepening, how much of the quarter depends on one person saying yes, and whether the field is running the strategy you set, while there is still time to adjust.

From second-hand numbers to answers that hold up *in the boardroom*

The CRM is a trailing indicator. Revenue AI reads it, so it gives confident answers on an old, incomplete record. Call recordings capture what happened on camera, but the CFO your champion has to check with never joins the call, and that person often decides the deal.

Backstory builds one true account of every customer from everything that happens with them, and reasons over it, so every answer comes with its evidence. Answers arrive in Slack, Teams, email and the LLM each leader already uses.

How it works for Executives

Answers from facts

Every interaction is broken into individual facts, like "the CFO asked about pricing." One call can produce up to 200 of them, and a busy deal holds 5,000 to 10,000.

Finds who shapes the deal

Backstory fixes stale titles and seniority, so a VP gets treated as a VP. About 5% of the people in a deal's record are mentioned and never present. CRM-only tools miss them.

Shows its work

Every fact links to the email or call it came from. Every risk keeps a dated history of when it appeared, changed and was resolved.

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:

EXECUTIVES WITH BACKSTORY

The gap looks small. *The risk behind it isn't.*

Commit & Closed sits close to quota. This answer shows how much of that commit carries a flagged risk, and which deals it comes down to.

BACKSTORY AGENT — MERIDIAN DEMO DATA

What's going to slip in this quarter's commit?

North America West is only $390K short on Commit & Closed, but $2.47M of the commit carries a flagged risk.

- **Meridian FY27 Expansion — $512K, Dana Whitfield.** Engagement 34, down from 82 in thirty days. No meeting since Aug 24, none scheduled. Economic Buyer blank in CRM. Public filings confirm a restructuring at Meridian affecting roughly 600 roles in the EMEA field organization, which is the scope of this expansion.
- **Sperry Grid Solutions — $490K, Tom Ashgrove.** In Stage 5 — Negotiation, but Northwind Analytics was named on an Aug 19 call and hasn't been addressed since. Scorecard 38.6%.

So: the quarter isn't short on pipeline, it's short on coverage. Two late-stage deals, each on a single point of failure, together worth two and a half times the gap.

SOURCES: 186 EMAILS AND 44 MEETINGS THROUGH SEP 16

Show me where to step in personally.

Meridian — David Kwan, SVP Operations. Your counterpart. One meeting May 14, nothing since. Score 12. Open on the restructuring rather than the deal: the expansion scope sits inside the org being reshaped, and he's the only one who can say whether it survives. Dana can't make this call.

Sperry Grid — competitive, not relational. Northwind has been in the room since Aug 19 unanswered. Ashgrove needs air cover for a displacement conversation, not an introduction.

Kwan this week, Sperry next.

EXECUTIVES WITH BACKSTORY

Big deals are resting on *a single relationship*.

Champions leave, go quiet, or get reorganized. This answer finds the commit that has no second name on record, and the buyer nobody has met.

BACKSTORY AGENT — MERIDIAN DEMO DATA

How much of the quarter depends on one person saying yes?

$1.29M of North America West's commit is single-threaded: one champion, or one economic buyer, and no second name on record.

- **Meridian FY27 Expansion — $512K.** 71% of all 47 activities are with Elena Vasquez alone. Silent 23 days.
- **Kestrel Marine Renewal — $455K.** 41 activities, one contact, no second name on record.

The sharper number is below the surface. On Meridian, the person with the highest buying power is Martin Feld, CFO. There is no record of any contact with him, ever, and no engagement score to report. Elena flagged on a Jun 18 call that anything above $250K needs his sign-off. The deal is $512K, closing in five weeks.

So: this is concentration risk, not a coverage gap. Each of these is one departure, reorg, or silence away from zero.

SOURCES: ACTIVITY ACROSS 3 OPPORTUNITIES, THROUGH SEP 16

Build the exec sponsor plan.

- **Martin Feld, CFO — Meridian.** No contact, no score, highest buying power in the account. The gap that actually closes the deal. An exec introduction is the only realistic path this quarter; there's no warm route through Elena while her org is being restructured.
- **David Kwan, SVP Operations — Meridian.** Score 12, last touch May 14. He validates that the expansion scope survives the reorg.
- **Priya Nandakumar, Director IT Security.** Score 4, never contacted directly, InfoSec still Pending Approval. Delegate to Dana today.

Two exec introductions, one delegated. Feld is the one that matters.

EXECUTIVES WITH BACKSTORY

Deal-by-deal reviews *miss the pattern*.

Forecast calls walk through deals one at a time. This answer groups the risk in Commit & Best Case into the patterns behind it, and says which one is yours to fix.

BACKSTORY AGENT — MERIDIAN DEMO DATA

What patterns are putting the quarter at risk?

FORECAST HEADLINES · EXECUTIVE LEVEL · COMMIT & BEST CASE

Three patterns account for $3.63M of the $16.82M in Commit & Best Case.

Stalled Executive Engagement — $1.87M · 5 opps

Late-stage deals with no senior contact active in 30+ days. Meridian's champion has gone silent 23 days amid a customer restructuring; Vantiv's sole contact left Aug 30.

Competitive Displacement — $1.12M · 3 opps

A named alternative entered on a call and went unaddressed. Northwind Analytics appears on both Calder Grid and Sperry Grid, the latter already in negotiation.

Procurement & Legal Compression — $640K · 2 opps

Halberd has had redlines outstanding 19 days, and Meridian's procurement lead surfaced Sept 4 with one unanswered email since.

So: a coverage failure, a competitive failure, and a process failure. Only the first is yours to fix directly.

SOURCES: 30 DAYS OF ACTIVITY ACROSS 10 OPPORTUNITIES, THROUGH SEP 16

Elaborate on the biggest risk.

Stalled Executive Engagement — $1.87M across 5 opportunities.

RISK DETAILS

- Elena Vasquez has had no contact since Aug 24 and sits inside the EMEA org named in Meridian's Sept 2 restructuring.
- Dana Whitfield emailed Elena and Meridian's procurement lead Sept 9. Neither replied.

NEXT STEPS

- Dana Whitfield to confirm the expansion scope survives the restructuring before the Oct 23 close date.
- Simone Delacroix to identify a second stakeholder at Kestrel Marine this week.

STAKEHOLDERS — MERIDIAN

- Elena Vasquez, VP Field Operations · 74 · silent 23 days
- David Kwan, SVP Operations · 12 · last met May 14
- Martin Feld, CFO · no score · never contacted

Learn more

The companies that know AI best *choose Backstory*

AMD · Red Hat · IBM · OpenAI · paloalto NETWORKS

What our customers are saying

"In high-performing sales teams, *clarity is everything* - visibility into activity, pipeline and execution is what fuels better decisions, faster course of correction, and more predictable outcomes."

Andrew Brown · SVP and Chief Revenue Officer, Red Hat

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 executives, on your own pipeline

backstory.ai/demo backstory.ai/role/executives