

GENUINE, VERIFIED INTENT



FORECAST  
UNDERSTANDING INTENT

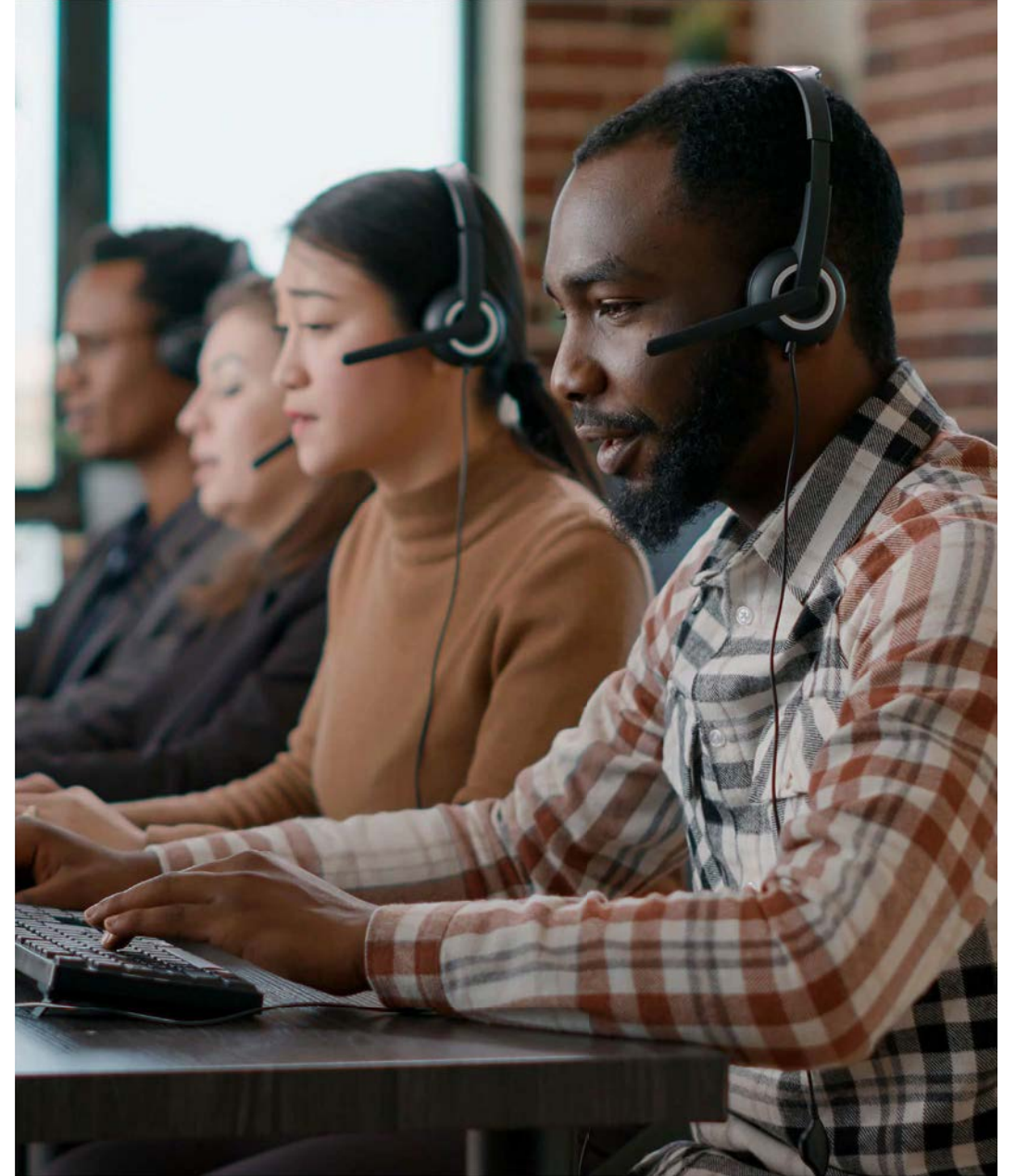
# INTRODUCTION

## **Forecast**

is an entirely new way of understanding intent to buy.

## **We use**

audio recordings (or transcriptions), emails, chatbot conversations or other communications with B2B customers and prospects. We create classifications of their interest levels in selected products and categories, together with sentiment and awareness, and feed the output directly to your CRM or sales teams for follow up.



## **Our insights**

are verifiably linked to the company and contact:  
not linked via the IP address

## **All information**

is collected through genuine conversations – not  
searches, downloads or cookies

## **Cookie – proof**

## **Data are identifiable:**

at company and contact level rather than URL - therefore  
are more granular and easier to merge back with the  
existing CRM



# HOW DOES IT WORK



## Transcription & translation

The audio files are transcribed into text format. Translation into English. (Other languages available)



## Concentration

Robot detection to remove answerphone recordings, conversations with gatekeepers, etc. Contact audio isolation. Summarised version of the text is made available



## Consent

Robot detection to validate that consent for marketing and for recording have been collected



## Keywords

Identification of brands, products and categories of interest. These are classified according to your main topics, under which there are more granular classifications.



## Sentiment

Content analysis of engagement and sentiment:

- Interested
- Uninterested
- positive negative neutral



## Plans

Identification of budget and timescale if mentioned



## Funnel

Modelling where the company is in the funnel: unaware, aware, interested, considering, evaluating



## Feedback

We take a monthly data feed from you with outcomes.

This is used to create a ML model for continuous improvement

# OVERVIEW

## **FORECAST identifies buyer intent and readiness to purchase**

Unlike other intent data providers, FORECAST is based only on actual call recordings - not on searches, page visits or other obscure signals. It is based at the call and contact level rather than whole company URL for more precise identification of a decision maker.

**Output:** intent score per call, together with funnel position



The AI model identifies the subject and analyses the content and meaning of recorded audio calls, identifying where a potential customer is interested in a particular product or service. Further modelling identifies where they are in the funnel (unaware, aware, interested, considering)

The commercial agreement is a subscription model based on the number and length of calls analysed



# IN A NUTSHELL



## Outputs: a data feed merged back into your CRM

- Your contact or company ID
- Call transcription
- Call translation (to English)
- Call concentration (reduced version)
- Call summary (text format)
- Call classification (database format)

## Flagged with

- Topic category
- Topic
- Engagement score
- Sentiment
- Forecast intent score
- Position in funnel
- Budget and timelines (where available)



CASE STUDY

# BNZ/SA





# CASE STUDY



**01** Transcription and translation

**02** Concentration

**03** Keywords

**04** Sentiment

**05** Funnel



# 01 Transcription and translation

Transcription and translation make the call content available and accessible in easy-access formats, to users with any language requirement. This can save storage space: audio recordings can be deleted



# 01 Transcription and translation

The audio recording is transcribed and translated (usually into English)

*Si la Microsoft siga dando soporte y a las posiciones, pues no hay ninguna prisa. Claro, claro, que es normal. ¿Y qué tipo de usuarios tienen en su compañía? Básicos en plan administradores, o hay alguno más específico? 11 Ya, somos un sector básico, quitando tres o cuatro que somos del departamento, y que sí que solemos ser un poco más... ...es un poco más... necesitamos algunas características, un poco más superiores, pues no hay nadie, o usuarios de oficina. 11 Claro. 11 Vale, no hay problema. ¿Y para los de oficina, digo, para los de... perdón, ¿y a IT piden algo en especial? 11 No sí, alguna característica... 11 Bueno, no, sabemos que hay tipos como mayor, no en mi momento, como mayor profesional, pues como mayor... Memoria, pues un poco de que tienen... por la final también, un poco más de uso, aguanten un poco más de carga y todo. 11 Claro, que aguanten más. 11 Vale, perfecto, pues yo lo he anotado todo a Miguel, se lo paso a mi compañero, y en cuanto pueda, le mando la invitación para el día 12 de julio, a las 10 y media. Muchas gracias, que tengas buena tarde. 11 Gracias.*

Windows 10 and Microsoft 10, giving support to these positions, Sure, I think that's normal. And what type of users do they have in their company? Are they basic in terms of administrators, or are there any more specifics?

they don't have any more. 1 Yeah, we're all basic. Well, we're three or four, two in the department, Sure. We need some more, some more statistics, As a superior, there is no one, the usual is the office automation.

and we just need to be a little more...

Ok, no problem. And for the office automation, I mean for those of IT, do they ask for something special?

Well, we have been looking for more professional, more... Of course, they hold more.

Ok, perfect. I have noticed everything, Miquel, I'll pass it to my partner and as soon as I can, I send the invitation for the 12th of July, at 10.30.

Thank you very much, have a good afternoon.

Thank you.



## 02 Concentration

For BNZSA, we reduced QC time by 50% without any loss of vital information. The CRM contains a classified version of the information provided by the contact, which can be used for future campaign selections





*Hello, good morning, how are you? I'm Pedro from BNZSA. Look, I call you in collaboration with Intel. Are you Adolfo, right?*

||| Pedro

Yes

||| Adolfo

*Hello Adolfo, how are you? Good morning. Look, I tell you very quickly, from Intel, some technical presentations are being organized about the Vpro platform, I don't know if you know it.*

||| Pedro

No

||| Adolfo

*Fantastic, I tell you very quickly, Vpro is a technology that Intel processors have. It is a chipset that is integrated into the hardware through which a tool is deployed or fimatic. What includes Vpro, among other things, is security, for example, in three layers directly from the BIOS, improvement of performance, stability, remote management capacity, too. And well, what we are organizing the last technical meetings for the month of October, in which it does a presentation by Teams, virtual, to give them a little to know the benefits of said tool.*

## 02 Concentration

The call is “top and tailed”, removing the extraneous parts to reduce time spent in QC. Contact isolation is applied so that the analysis of intent only applies to the part of the conversation contributed by the contact. Summarisation of the call is available in text or classified versions: the latter can be incorporated in a CRM

01

Transcription and translation

02

Summarisation of the call in text

03

Classified versions



## Summarisation of the call in text

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Pedro contacts Adolfo to discuss technical presentations about the Vpro platform. Pedro explains that Vpro is a technology integrated into Intel processors, offering features like security, performance improvement, stability, and remote management. They discuss the upcoming virtual presentations in October and aim to tailor the information to Adolfo's company, which has around 300 computers and 5-6 servers. Adolfo mentions using mostly i3 processors and some i5.

Pedro inquires about the technology adoption of Vpro in Adolfo's computers and the brands they usually work with. Adolfo confirms the intention to renew 50-60 teams but is uncertain about the exact number due to budget considerations. Pedro asks about the migration to Windows 11, and Adolfo mentions monitoring it for new computers.

Towards the end, they schedule a presentation for October 16 at 9 AM, and Adolfo provides his email for the invitation. Pedro confirms the details and thanks Adolfo, ending the conversation.



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## Classified version in text

### **Company Infrastructure:**

Approximately 300 computers and 5 or 6 servers.

### **Processor Information:**

Mainly uses i3 processors, with a recent purchase of a loose i5.

### **Brand Preferences:**

Uses a variety of brands, opting for public purchases that are best for all.

### **Team Renewal Plans:**

Intention to renew 50-60 teams, with uncertainty due to budget considerations.

### **Windows 11 Migration:**

Actively monitoring the migration to Windows 11 for new computers.

### **Contact Information:**

Company email for the invitation

### **Availability for Presentation:**

Agreed to a virtual presentation on October 16 at 9 AM.

### **Budget Decision Timeline:**

Budget details and confirmation of team renewal plans expected after the 24th.



## 03 Keywords

Each main topic category is associated with keywords found in the conversation. The number and combination of keywords will classify the call content as associated with that topic. The keywords may be generalist, or brand specific.



## 04 Sentiment

Engagement and sentiment are important inclusion/exclusion criteria, especially when we are gauging the contact response to certain brands. Our model classifies each call with a high topic score, with level of contact engagement (interested or not interested) and sentiment (positive, negative or neutral)



## 04 Sentiment

- Current setup includes Logitech headphones and Poly 20 Plus speakerphone.
- Transitioning to a hoteling solution in June.
- Hold daily hybrid meetings using Teams and Zoom.
- Priorities are flexibility and quality in AV solutions.
- Poly 20 Plus chosen for its compatibility with both Teams and Zoom.
- Considering options for meeting room setups, currently favoring Poly but open to reevaluation in the future.

And more regarding the solutions for like the meeting rooms, conference rooms, you know, how those spaces that you might have there also. ;; Like in terms of the hybrid setup there, you know, where are you currently in terms of, you know, your audio visual solutions that you use with the hybrid? ;; I mean, are we talking about work hybrid solutions? ;; Yeah, yeah. ;; Working from home and working from the office. ;; Yeah, like the more office side of things. ;; Well, I mean, the thing is, is that we're moving our site office in next June. ;; So we've got, I mean, every, all of our workstations have a camera, they all have like headphones, usually oftentimes Logitech headphones. ;; Not always, sometimes electronics. ;; We'll probably standardize more, but going to a full hoteling solution. ;; And yeah, I mean, I think we've got a good strategy and solution in place. ;; I mean, if there's any new developments, I'm welcome to hear about them because it's a changing environment all the time. ;; So yeah, of course, like do you hold hybrid meetings on like a kind of daily basis? ;; Like most large? ;; Every day, yeah, we know we do have, we have like meeting rooms, we have, we use teams and zoom both. ;; Yeah, I mean, that's the nature of our business. ;; We're, I mean, they're consultants for executive search. ;; So we're constantly talking to people. ;; That's what we do. ;; Okay. ;; Right. ;; Yeah, just to get an idea where you're at. ;; What is the kind of priority there in terms of that? ;; Is it like security, accessibility, flexibility? ;; Yeah. ;; Yeah. ;; It's all of the above. ;; I mean, mainly it's flexibility and quality. ;; So yeah, I mean, quality is probably the most important thing both with audio and video. ;; We've got, I mean, we have, we use a speakerphone, but we use the, the, the poly 20 plus like desk speakerphone. ;; Okay, sure. ;; Mainly because it's, it's rated for both teams and zoom. ;; That was that we were using Jabra's, but sometimes they kind of go off because they're not rated fully rated for one or the other. ;; But these are the one units so you can find the R. That's a, that's pretty key to have a, have a unit that it's got to be teams compatible and zoom compatible. ;; Yeah. ;; And then, yeah, I mean, our room, our, our rooms, man, I've seen the Logitech, we ran around and I've seen Logitech room for the room, maybe. ;; I'm not really sure what that is on Polly, but there's zoom rooms. ;; I'm kind of looking at teens. ;; I, I don't know if there's any difference. ;; I mean, how much difference between a Logitech and as Polly room, we just kind of invest in the

an a couple years, if we review that, you know, if we want to move, that might be a

ould have to look at Logitech's, but I'm not quite there yet.

Topic category  
Hardware

Topic score  
91.67

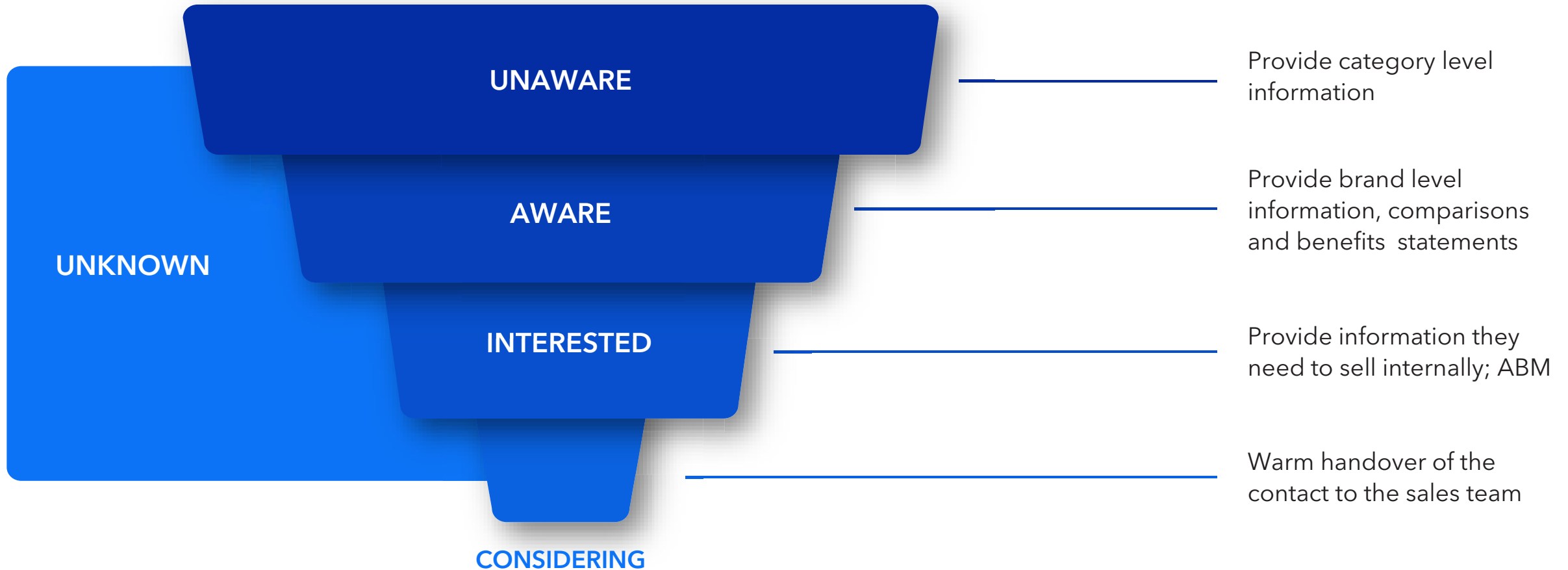
Engagement  
Interested

Sentiment  
Positive



## 05 Funnel

Based on the conversation, we model the position in the funnel of the content for that particular topic/s, which provides vital information for the next communication within the customer journey. For BNZSA this has reduced the number and length of calls required to execute a WHO, and improved contact satisfaction by saving them time and making them look good internally



# SUMMARY

**FORECAST identifies buyer intent and readiness to purchase**

## Sales benefits

Identification of prospects with immediate intent.

Segmentation of buyers for personalised targeting according to funnel position and readiness.

Generates current and future insights to build your sales pipeline.



## Risk benefits

Improves compliance by automatically checking that all boxes are ticked.

## Operational benefits

Improves agent training in compliance checklists and in insight generation from calling activity.

Reduces agent effort in manual transcription and note taking.

**THANK YOU!**

