

AI Enhancements Across the Forrester Waterfall



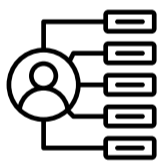
Predictive Intelligence at Every Stage

Predictive lead scoring helps sales and marketing prioritize efforts on higher-probability revenue opportunities as compared to the reactive 2021 model.



Buying Group Detection

AI uses intent data, NLP & account activity to auto detect buying group behavior across different channels.



Real-Time Segmentation & Personalization

AI dynamically segments buying groups and personalizes messaging based on behavior, firmographics, and content interaction.



Revenue Operations Automation

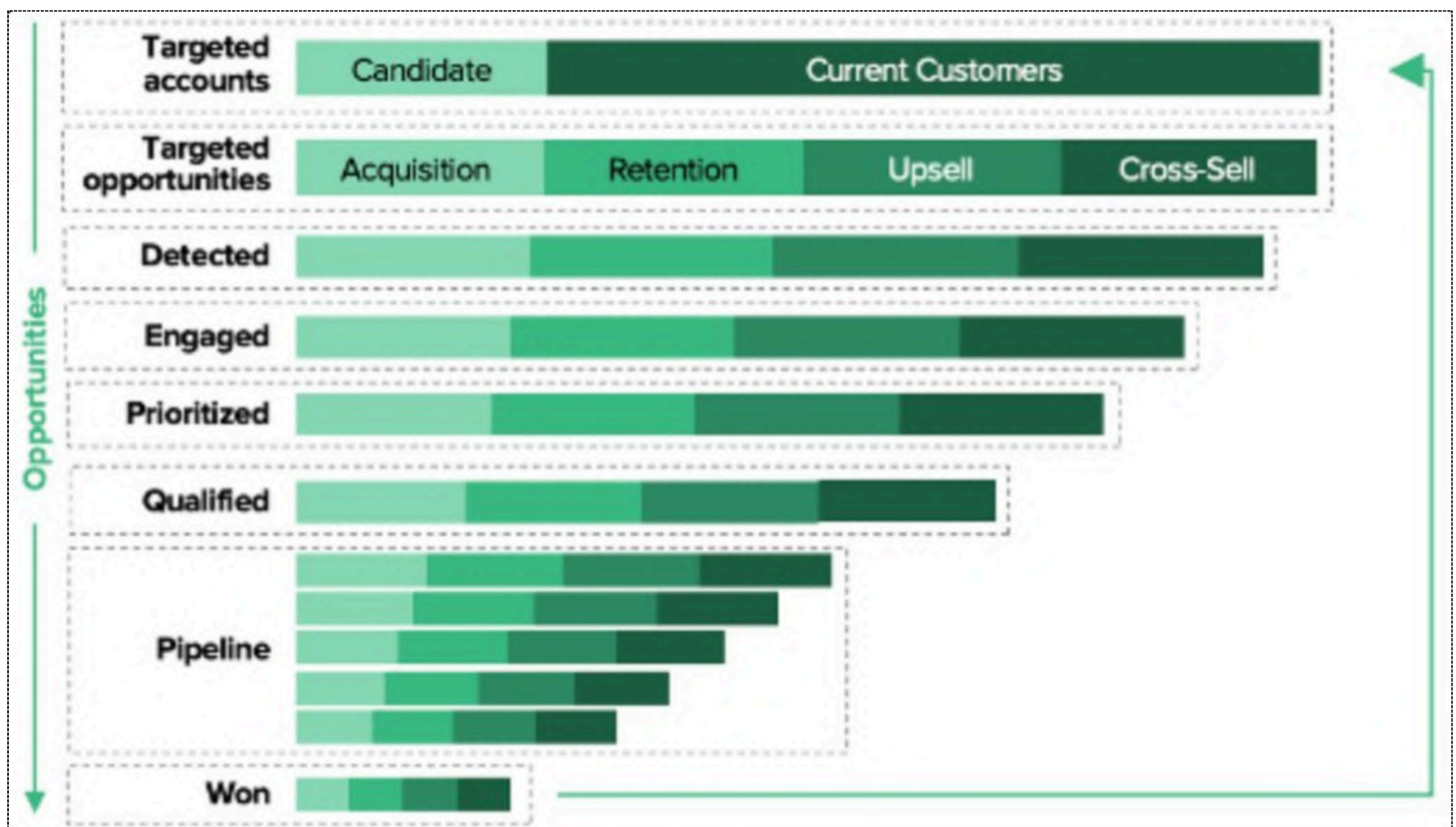
AI automates data cleansing, lead-to-account matching, attribution, and funnel diagnostics, providing cleaner funnel visibility and more accurate performance insights than the 2021 model.



Funnel Fluidity vs Linear Movement

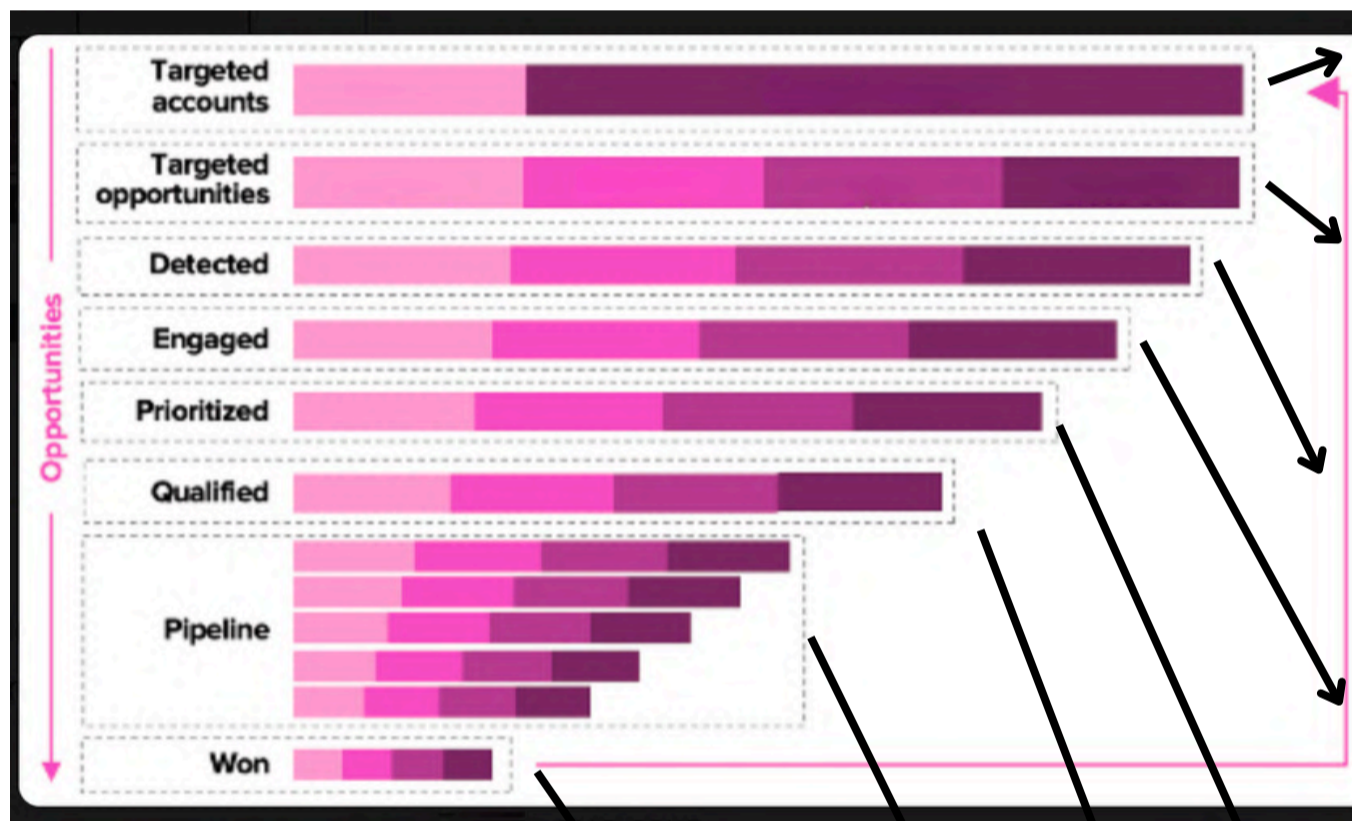
AI interprets non-linear buyer journeys using behavioral modeling, challenging the older stage-by-stage view and shifting focus on revenue acceleration paths, where AI recommends the next best action or content.

Traditional 2021 Forrester B2B Revenue Waterfall



Source: Forrester's 'Driving Revenue Growth' research paper

How Native AI Agents Can Supercharge Every Stage of the Forrester Revenue Waterfall



- Leverage intent signals to identify high-fit accounts

- Identify in-market buying groups across channels

- Identify Demand Units within accounts

- Opportunity classification using behavioral + intent signals

- AI surfaces high-intent accounts via web activity and intent signals

- Identifies verified buying group members

- 24/7 conversational agents engage buyers instantly and nurture them through relevant contextual content

- Hyper-personalized interactions based on role, stage, and pain point

- AI analyzes engagement, fit, firmographic & intent signals to generate lead scores & prioritize opportunities based on conversion likelihood

- Continuous updation of opportunity prioritization—AI identifies the most engaged roles and prioritizes the account accordingly

- Autonomous qualification through AI conversations

- Real-time routing to sales with buyer context

- Deal acceleration with AI nudges

- Opportunity-level insights surfaced to AEs

- AI assists in onboarding, upsell/cross-sell triggers

- Closed-loop feedback for better future targeting