



# Platform Capabilities & Features

Pipeline Intelligence by Trydent

## CAPABILITY GUIDE

Outcomes for customer-facing teams

## Master your customer engagement.

Give every conversation better context — so customers feel known, agents spend less energy hunting for answers, and managers see risk before it becomes churn.



SATISFACTION



AGENT FATIGUE



EARLIER FORESIGHT

### PIPELINE INTELLIGENCE — CRM



#### Account dossiers

One place for deals, contacts, strategy, activity, and research — so every touch starts informed.



#### Live account intel

Why now, pitch, and next move — preemptive context before the customer asks for it.



#### Pipeline analytics

Funnel, forecast, and portfolio signal — so leaders coach to outcomes, not hunches.



#### At-risk register

Score and act early — catch friction before it becomes a complaint or a lost renewal.



#### Work email

Any work mailbox — threads matched to the account so history travels with the relationship.



#### Calendar & follow-ups

Close targets and scheduled touches on the morning dashboard — fewer dropped promises.

### ONE PLATFORM — FOUR WORKSPACE PERSONAS



#### Sales

Pipeline view



#### Customer success

Book view



#### Account mgmt

Portfolio view



#### Customer care

Cases & Desktop

### HOW TEAMS WIN IN THE WORKSPACE

Four connected layers — from knowing the account to coaching the outcome.

#### 01 · SEE

##### Intel

Preemptive briefings — why now, pitch, and next move on every account.

#### 02 · ASK

##### Signal

Less searching — answers, drafts, and the right view in one keystroke.

#### 03 · DECIDE

##### Analytics

Clear priorities — funnel, forecast, and risk before the week slips.

#### 04 · SHARE

##### Reports

Aligned teams — manager packs that turn insight into action.

## Signal — your in-app copilot

⌘K · Ctrl+K

Opens on every screen. Signal cuts the swivel-chair work — answers from live CRM context, drafts outreach, opens the right view, and nudges the team before a relationship cools.

### IN THE WORKSPACE

- Ask what matters next — grounded in live CRM data
- Draft replies without leaving the account
- Summarize forecast and at-risk books in seconds
- Jump to dossiers, Calendar, Reports — less hunting

⌘K copilot

Pipeline Q&A

Email drafts

Forecast summary

Navigate & act

Outside alerts

Daily digest

### OUTSIDE THE APP

- Know when a customer replies — even away from the desk
- Catch overdue follow-ups before they become silence
- Surface high / critical risk early
- Daily digest at your local time · mute per account

### HOW SIGNAL IS GROUNDED

Signal doesn't answer from pooled data across other companies' accounts. Every response is grounded in your live, per-account CRM — deals, contacts, strategy, and activity as they stand now — plus proprietary research that surfaces outside context the CRM alone wouldn't show.

### ONE WORKSPACE INSTEAD OF —

Gong

Clari

Zendesk

RingCentral

Front

6sense

SalesLoft

ZoomInfo

### True omni-channel platform — CRM + phone + IVR + ticket

One workspace for the relationship — softphone, shared inbox, IVR queues, SLA tickets, agent Desktop, and supervisor Ops on the same account book. Fewer handoffs. Faster, calmer service.

### Connect Ops

Live wallboard, call logs, recordings, and queue health — so supervisors coach in the moment

### AI phone agents — solve problems on the call, route to humans when it matters

Conversational AI answers your main number, handles routine requests from your playbook, and connects callers to the right teammate when they need a person — with CRM context on handoff, not a dead-end phone tree.

#### Resolve on the call

FAQ, status checks, and common requests — answered from your instructions instead of “press 1 for…” menus.

#### Human when necessary

Complex, urgent, or emotional calls route to your team — warm handoff, not voicemail limbo.

#### Specialist playbooks

Each queue’s AI follows what that team handles — billing, technical support, sales, and more.

#### Greet by name

Known CRM contacts hear their first name; unknown numbers get a warm generic greeting — never guessed.

### Live coaching — Signal tips for reps during the call

While your team is on a live call, Signal surfaces short coaching hints on their screen — grounded in the live transcript and account context. Only the rep sees it; the customer never hears it.

#### Real-time hints

Actionable tips land while the conversation is still happening — not in next week’s debrief.

#### CRM + transcript grounded

Coaching reflects this account and this call — not generic scripts from a pooled model.

#### Live sentiment

Surface when a call is turning negative so reps can adjust before it escalates.



### Browser softphone

Answer with the dossier already open — click-to-dial, screen-pop, less time asking customers to repeat.



### Tickets & SLA

Queues, email-to-ticket, and triage hints that keep promises visible — and customers less waiting.



### Shared inbox

Team mail matched to accounts — one thread of truth instead of scattered inboxes.



### Agent Desktop

Tickets, queue pulse, Customer 360, and live Signal coaching on ring — calm focus instead of tool-switching.



### Voice queues & IVR

Shared lines, ACD, and overflow that protect the customer experience when volume spikes.



### Lead intake & Finder

New demand lands in the CRM with context — so the first reply already feels personal.

| PERSONA-TAILORED REPORTS & WEEKLY PACKS    |       |    |    |      |   |
|--------------------------------------------|-------|----|----|------|---|
| Report                                     | Sales | CS | AM | Care |   |
| Weekly pack (charts + KPIs)                | ✓     | ✓  | ✓  |      | ✓ |
| Executive summary & funnel                 | ✓     | ✓  | ✓  |      | ✓ |
| QBR / account brief · Deep Research report | ✓     | ✓  | ✓  | —    |   |
| Renewal health · Expansion · Service ops   | —     | ✓  | ✓  |      | ✓ |
| Rep scorecard · At-risk register           | ✓     | ✓  | ✓  |      | ✓ |

Sixteen report types across weekly packs, funnels, scorecards, and dossiers — so each persona sees the outcomes that matter to their book, not a generic dump of charts.



ISO 27001



GDPR compliant



Tenant isolation



99.9% uptime SLA

### CONNECTED WITHOUT THE CHAOS

Work email (Google, Microsoft, or any IMAP mailbox) · voice & SMS · calendar follow-ups · website forms and webhooks into the CRM — so the relationship stays in one story, not five tools. Guided onboarding means teams stand up the workspace without a dedicated RevOps build-out.

### SECURITY & DATA

ISO 27001 ISMS and GDPR compliant · multi-tenant isolation · role-based access · HTTPS in production · admin audit trail · **99.9% uptime SLA**.

THE OUTCOMES THAT MATTER

Capabilities only count when the day feels better for customers and the people who serve them.

### Higher customer satisfaction

Agents greet with full context — fewer repeats, faster resolutions, conversations that feel personal.

### Less agent fatigue

CRM, phone, IVR, and tickets in one workspace — screen-pop instead of tab-hopping and swivel-chair work.

### More preemptive information

Intel, Signal, and at-risk alerts surface what matters before the customer escalates — or goes quiet.

### Clearer coaching & foresight

Analytics and persona reports show who needs help next — managers coach to outcomes, not after-the-fact fire drills.

pipelineintelligence.io to book your demo

Page 2 · Connect, trust & outcomes

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# Why Pipeline vs. point solutions

Pipeline Intelligence by Trydent

## CAPABILITY GUIDE

Competitive grounding for buyers & investors

### ONE WORKSPACE VS. A STITCHED-TOGETHER STACK

| Dimension         | Point-solution stack (e.g. Gong + Zendesk + RingCentral)                                                               | Pipeline Intelligence                                                                                                                                     |
|-------------------|------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| AI grounding      | Proprietary models trained on pooled interaction data across the vendor's entire customer base                         | Signal answers from your live, per-account CRM record — deals, contacts, strategy, activity as they stand today                                           |
| External context  | Limited to what happened inside your own calls, emails, and CRM activity                                               | Proprietary research intelligence layered on top of CRM data — surfaces why-now and account signal from outside your four walls                           |
| System of record  | Intelligence, CRM, and contact center live in separate products that require ongoing integration work                  | One account book powers pipeline, email, voice, tickets, and reporting — nothing to reconcile                                                             |
| Rollout           | Point tools are commonly reported to need multi-week onboarding and dedicated RevOps support to configure and maintain | Guided setup inside one workspace — no separate integration project between CRM, dialer, and helpdesk                                                     |
| Data governance   | Cross-customer pooled training data raises questions about tenant separation                                           | Per-tenant isolation by design — ISO 27001 & GDPR compliant, no cross-account pooling                                                                     |
| AI phone agents   | Press-1 IVR trees or bolt-on voice bots — no CRM context on handoff, and callers often dead-end in voicemail           | Conversational AI resolves routine calls from your playbooks, routes to humans when needed — CRM-aware greeting and warm handoff on the same account book |
| Live rep coaching | Supervisors coach from recordings after the call; reps fly solo until the debrief                                      | Signal streams short coaching tips on the rep's screen during the live call — transcript and CRM grounded, invisible to the customer                      |

### HOW AI PHONE AGENTS ACTUALLY DIFFER

#### CATEGORY NORM

- "Press 1 for sales" menus — callers navigate digits before a human picks up
- Standalone voice bots with no tie-in to CRM, tickets, or screen-pop on transfer
- AI tries to handle everything or dumps callers to voicemail — no warm escalation path

#### PIPELINE AI AGENTS

- Solves FAQ, status, and routing from per-queue specialist playbooks — not a phone-tree maze
- Routes complex or emotional calls to your team with context — warm handoff, not voicemail limbo
- Greets known CRM contacts by name; same workspace powers voice, dossier, and tickets on transfer

### HOW SIGNAL'S GROUNDING ACTUALLY DIFFERS

#### CATEGORY NORM

- Trained on a large pooled corpus of calls, emails, and CRM activity across many customers
- Strength: pattern-matching — "what tends to win deals like this one"
- No external research ingestion — only sees what happened inside your own conversations
- Insight quality depends on your own CRM hygiene and interaction volume

#### SIGNAL

- Grounded in your live, per-account CRM context — not a cross-customer average
- Strength: precision and freshness — answers reflect this account's actual current state
- Proprietary research intelligence adds outside signal a closed CRM-only model can't produce
- No pooling of your data with other tenants' interactions

Note: claims about specific competitor products (implementation time, RevOps requirements, training data scope) reflect public vendor documentation and third-party reviews available as of mid-2026, and should be reverified against current vendor materials before external use in a pitch or sales deck.