

Operationalizing SPICED with People.ai

Replace rep anecdotes with data-driven insights to make sales methodologies stick

"People.ai brings SPICED to life in a way that finally makes methodology adoption data-driven. It's one of the few platforms that actually gives reps time back and drives adoption."



Walter Velazquez Taboada
Growth Architect,
Winning by Design

What does People.ai solve?

GTM teams invest heavily in methodologies like SPICED and MEDDPICC, but adoption stalls when those frameworks aren't reinforced in their day-to-day work or reps have to hand-enter data.

The GTM intelligence market is crowded – from lightweight call notetakers to full GTM intelligence suites – yet many tools still rely on reps to map activities to the right Account, Opportunity, or Contact. This results in incomplete or mis-logged data, weak multithreading signals, and noisy forecasts. People.ai helps close this execution gap by automatically capturing and linking engagements to the correct records, enriching contacts, and making methodology fields and buyer groups measurable. Leaders can see coverage, risks, and next steps, which enables better coaching and more predictable deal progression (without asking reps to do data entry).

Who is People.ai for?

Mid-market and enterprise revenue teams who want their CRM to reflect reality, especially where:

- A methodology exists but execution/adoption is inconsistent
- CROs must prove training ROI with observable, quantifiable behaviors
- RevOps is battling “garbage-in, garbage-out” data
- Sales leaders want to coach from buyer engagement, not rep narratives
- CS needs presale context to deliver impact faster

What's unique about People.ai?

Patented matching. ML-based scoring maps emails/meetings to the right Account, Opportunity, and Contact

Privacy-filtered capture. NLP filters out personal/sensitive content before CRM sync.

Auto-enriched contacts. Creates missing contacts; enriches persona, seniority, engagement, and predicted buying power to validate SPICED stakeholder coverage.

Methodology operationalization. Opportunity Scorecards and Relationship Maps enforce qualification criteria (like SPICED or MEDDPICC) and visualize buying group coverage at scale.

How is People.ai leveraging AI?

AI powers People.ai (and *its* AI can power internal team tools), but it's particularly relevant in the following features:

Deal summaries. Auto-snapshots of key topics, risks, and next steps based on engagement history

SalesAI assistant. Ask “What are the risks on this deal?” or “Evaluate against SPICED” and get data-backed answers

Auto-filled opportunity scorecards/account plans. Pre-populates methodology fields with captured activity data

Forecasting headlines. Surface insights on what's impacting your forecast (risks, trends, blockers) and see the deal value at risk – before it hits your number

What's great about People.ai?

Unmatched data accuracy: Patented opportunity-level matching means activities land in the right deal (vs. ~25% of competitor-captured activities logged incorrectly); it also logs interactions across deals as you go

Trustworthy AI: The data foundation is clean and complete, so AI outputs (summaries, risk signals, recommendations) are accurate and actionable, not hallucinated from bad CRM data

Flexible/UI-agnostic: Consume data on your own terms within your CRM, Copilot, homegrown AI tools, etc.

Time back to sell vs. manually logging activities (e.g., AMD reduced 75-85% of time spent on data entry)

Methodology insurance: Scorecards show which deals are SPICED-qualified vs. fluff, validating your training

What's not as great?

Requires CRM commitment: Best results come when layered on Salesforce or HubSpot; less suited for orgs without established CRM or those starting with poor CRM hygiene

Data foundation is the entry point: AI features (SalesAI) require activity data flowing first; you can't skip straight to the shiny stuff without the data layer underneath

Won't fix bad process: People.ai amplifies and enforces good methodology – it doesn't teach reps how to sell

What's missing? (gaps we'd watch)

Conversation intelligence nuance: People.ai tracks that engagement happened and with whom (and sentiment), but not tone of voice. For qualitative coaching on talk tracks, customers still need tools like Gong.

Limited pre-CRM visibility: Captures activity once reps are engaged but doesn't help with top-of-funnel intent data or account identification before outreach starts.

What's on the roadmap?

Methodology tracking in manager reports: SPICED scorecard completeness across all deals at a glance

AI deal predictions: Next-step recs based on similar closed-won deals, aligned to deal stage and methodology

Suggested champions: Auto-identify champions, detractors, economic buyers from engagement data

Relationship maps: AI to map buying groups automatically and show if reps are single- or multi-threaded

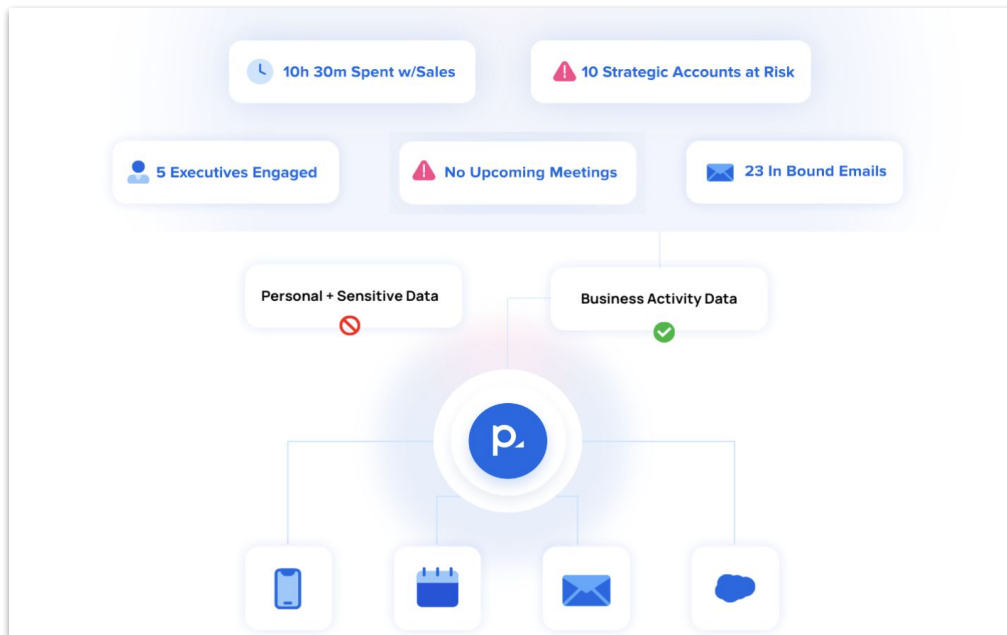
Our quick take

People.ai turns engagement into CRM-ready, methodology-aligned data via patented mapping and auto-capturing emails/meetings, enriching contacts, and filling SPICED/MEDDPICC scorecards so leaders see coverage/risks and reps skip data entry. Think “fix the data, make methodology measurable, coach to facts,” less “live voice/tone coaching or hands-free, cross-tool orchestration.”

THE PLATFORM

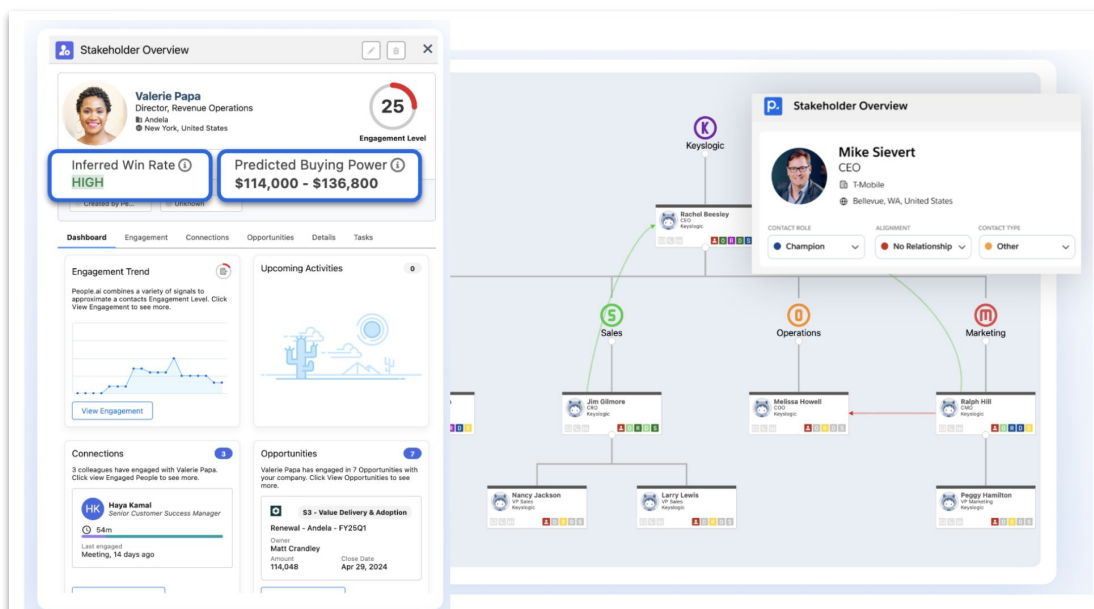
People.ai is built around a data-first architecture. Teams get a **Data Foundation** that captures and matches customer interactions to the right CRM records and a **ClosePlan** to operationalize GTM methodology with scorecards and relationship maps.

Data Foundation



Automatically capture sales activity, filter sensitive content, and match interactions to the right CRM record without manual entry.

ClosePlan



Turn your methodology into scorecards that qualify deals, relationship maps that show real engagement, and account plans that align teams.

THE PLATFORM

SalesAI surfaces insights and automates account planning, while **Forecasting** builds predictions on real buyer activity and flags risks before deals slip.

SalesAI

The screenshot displays the SalesAI interface for a deal titled "Apex Global - New Business". The deal is owned by Lindsey Stanton, has a close date of Aug 4, 2023, and an amount of \$575,000. It is currently in Stage 5 - Awaiting signature. The interface includes a "SalesAI Deal Summary" section with three columns: Key Topics, Next Steps, and Blockers. The Key Topics column lists recent interactions and a group discussion. The Next Steps column lists tasks for Davis Aminoff, Skylar Botosh, and Kaylynn Babtista. The Blockers column lists risks such as Risk Assessment, Code Review, and Compliance Verification. A modal window on the right asks "What would you like to know about this deal?" and provides three options: "Catch me up on this deal", "What are the key risks?", and "Evaluate this deal using MEDDPIC".

Apex Global - New Business
Apex Global

Owner: Lindsey Stanton | Close date: Aug 4, 2023 | Amount USD: \$575,000 | Stage: Stage 5 - Awaiting signature

SalesAI Deal Summary

Key Topics

- The most recent interactions involved participants from both sides, including Kaylynn Babtista, Skylar Botosh, Kadin Vaccaro, Davis Aminoff, and Ryan Saris from People AI, and Erin Westervelt from Apex Global.
- The group discussed the review of revised proposals, questionnaires, account intelligence, and provisional offers.

Next Steps

- Davis Aminoff needs to organize a legal/legal call with both teams to expedite the process.
- Skylar Botosh needs to schedule time with Erin Westervelt to work through open security/privacy questions and review the contracts with Helena Carter.
- Kaylynn Babtista and Kadin Vaccaro need to stay engaged with Lindsey Stanton and Erin Westervelt to finalize the agreement and launch the project.

Blockers

- Risk Assessment: Completion of initial risk assessment of the implementation of the new system.
- Code Review in Progress: Undergoing a detailed source code for security vulnerabilities and performance.
- Compliance Verification: Need to ensure the system meets all relevant industry regulatory requirements before proceeding.

Sourced from email data - last 30 days

What would you like to know about this deal?

- Catch me up on this deal
- What are the key risks?
- Evaluate this deal using MEDDPIC

Turn captured activity into account summaries, deal risk alerts, automated SPICED scoring, and real answers about what's happening in your pipeline.

Forecasting

The screenshot displays the Forecasting interface for the United States. It shows a table of deal forecasts by territory, with columns for Territory, Closed Won, Commit, Best Case, and Pipeline. The table includes data for the United States, West US, East US, Central US, and South US. The table also includes a "Headlines by SalesAI" section with three categories: Committed Deals Slipping, Integrations/Tech Concerns, and Missing Security & Legal. The table is filtered by "Current FO" and has a "Submit" button.

United States

Current FO | Submit

Headlines by SalesAI

- Committed Deals Slipping**
\$ 2,375,000 Amount | 9 Opportunities
- Integrations/Tech Concerns**
\$ 1,250,000 Amount | 5 Opportunities
- Missing Security & Legal**
\$ 659,000 Amount | 3 Opportunities

Territory	Closed Won	Change	Commit	Change	Best Case	Change	Pipeline	Change
United States	\$6,083,270	↗ \$1M	\$12,774,529	↘ \$450K	\$19,888,406	↗ \$250K	\$61,500,000	↘ \$400K
West US	\$2,756,890	↗ \$100K	\$4,453,620	↘ \$400K	\$7,218,430	↗ \$100K	\$22,500,000	↘ \$200K
East US	\$1,550,100	↗ \$250K	\$3,629,838	↗ \$100K	\$5,841,262	↗ \$350K	\$15,000,000	↗ \$300K
Central US	\$1,000,780	↗ \$100K	\$1,851,150	↘ \$250K	\$2,813,582	↘ \$200K	\$10,500,000	↗ \$100K
South US	\$775,500	↗ \$150K	\$2,839,921	↗ \$100K	\$4,015,132	↗ \$100K	\$13,500,000	↘ \$150K

Build forecasts on actual buyer activity, not rep guesses. Catch stalled deals, missing engagement, and pipeline risks before they cost you the quarter.

Five9 Turns SPICED into 20% Higher Win Rates

SITUATION

Corran is the RVP of Account Strategy at Five9, a global leader in cloud contact center software. With 3,000 employees and a 300+ person sales org, Five9 had built product-led sales culture over its 20+ years in the CCaaS space.

Corran and his team were charged with leading a transformation: move away from feature pitching to a more consultative approach. The org wanted to standardize how every seller, from acquisition to expansion, qualified and managed deals, and ensure that reps and managers spoke a common language.

PAIN

As Corran put it, "We were a product-selling org, and it wasn't working anymore."

Reps walked into deals with blind optimism, saying "I think we'll win this one," without any insight or rigor. Deal reviews were inconsistent, run differently by every manager. They'd historically been a MEDDPICC shop, but teams needed to be taught to have a conversation and ask questions versus just filling out a sales stage. Reps confused expiring contracts with real urgency, and across the board, customer pain stayed buried.

Corran partnered with WbD to roll out SPICED training for the org, but it wasn't enough. Adoption was slow, and reps reverted to old habits.

Few were applying it in the field. Without a way to operationalize SPICED at scale, the program risked fading within weeks. "Until you're doing it every day," Corran said, "it doesn't change anything."

IMPACT

Corran partnered with People.ai to integrate SPICED scorecards directly into Salesforce. The system automatically captures every email, call, and meeting, and pre-fills SPICED answers using AI. Reps remain in control – they review and refine their answers – but now they have a powerful assistant instead of a blank screen for notes.

Managers have a single lens for deal inspection across 300+ sellers, supported by AI-generated ratings. There's no more sugar-coating; deals are assessed consistently, and coaching is based on real data.

Results were fast and dramatic: Training adoption jumped from 15% to 55% in just two weeks after leadership tied it to the tool. Now Five9 is pushing toward 95%+ adoption across the company. Reps fully engage in conversations without worrying about note-taking, and deals with completed SPICED scorecards win at 20% higher rates than those without.

Entire departments (even billing and marketing) have adopted SPICED, creating true cross-functional alignment.

"Too often, our AEs were sitting back and just taking notes... Now they can actually listen to the customer so they know what to ask next. They can be framing their impact or pain questions. You've got to be a participant in the conversation to do that."

– Corran Ashby, RVP Account Strategy

QUANTIFIABLE IMPACT

20%

Higher win rates on properly qualified deals

+40%

Training adoption rate in 2 weeks

How the Platform Supports the WbD OS

Training is the start — making it stick is the real challenge

01

Adopting a sales methodology like SPICED is only half the battle — getting teams to consistently apply it is where most orgs stumble. People.ai bridges this execution gap. Through its integration with the CRM and daily seller tools, it captures every customer-facing signal — meetings, emails, calls, and activities — and maps them automatically to SPICED (or MEDDPIC, Challenger, etc.). Sellers no longer need to enter qualification data or take notes. Instead, AI-powered scorecards pre-fill SPICED fields using engagement data, giving reps and managers clear deal data and a faster path forward.

03

WbD champions sales as a science, and People.ai reinforces this by replacing guesswork and gut feelings with fact-based visibility into pipeline health. By automating the data foundation, it ensures your bowtie is actionable and measurable. More complete, accurate data means revenue leaders can forecast based on real indicators (not rep opinions) and intervene earlier in at-risk deals. Just as WbD emphasizes diagnosing before you prescribe, People.ai provides the insights needed to do that at both the rep and team level.

02

Operationalizing SPICED ensures that sellers and managers apply the same qualification standards across both sides of the bowtie. For example, managers can see which SPICED elements (Pain, Critical Event, etc.) are missing or weak in any given deal, and AI-driven “quality ratings” flag risk areas. This shared language and review process improves coaching and brings consistency and objectivity to deal inspection at scale. Teams don’t just learn SPICED once — they use it daily, without added friction on their end. The result is higher adoption, higher conversion, and a path to repeatable, scalable growth.

Drive adoption with:

- **SPICED scorecards** auto-filled using calls, emails, and meetings — and added directly to your CRM
- **Forecasting grounded in data**, not rep sentiment, with full visibility into qualification gaps
- **Manager coaching guided by SPICED ratings** — highlight risks and suggest next steps for improvement

*“By unifying all account activity across the bowtie (emails, meetings, transcripts, sentiment, contacts) and automatically building the SPICED view for them, **sellers can focus on selling, and managers can coach based on reality rather than incomplete notes.**”*

— **Walter Velazquez Taboada**, Growth Architect, WbD



The WbD Verdict – People.ai

Quick take: People.ai is a data-first GTM platform that improves execution by auto-capturing emails/meetings and mapping them to the right account/opportunity/contact, and then operationalizing methodology with scorecards and relationship maps. With multi-deal writebacks and assistant-style Q&A across meetings, deals, and companies, leaders can inspect coverage, risks, and next steps from actual buyer engagement.

Best for: Mid-market/enterprise teams that want reliable data, verified methodology adoption, and faster coaching/forecast hygiene – without adding rep admin.

Overall rating: ★★★★★ 8.9/10

Why this score: Market-leading data capture/matching + privacy filtering; strong scorecards/relationship maps; assistant-level guidance across entities; and multi-deal writebacks. Points off for no voice/telephony agent (doesn't ingest phone audio) and broader cross-system automations still developing.

PROS

- **Accurate, automatic data foundation:** Emails/meetings auto-captured and mapped to the right A/O/C; reduces mis-logged data that skews forecasts and AI
- **Methodology operationalization:** SPICED/MEDDPICC/Challenger supported; scorecards make adherence observable at scale
- **Multi-deal writebacks:** Can write to multiple open deals at a company and post-close
- **Assistant across entities:** Text/chat assistant that “talks to” a meeting, deal, company in plain language and aggregates insights across them
- **Privacy posture:** Personal/sensitive content filtered prior to CRM sync

CONS

- **No native voice agents / phone-audio CI:** Supports Phone (Dialer) does not ingest phone call audio; voice/tone coaching requires a CI tool alongside.
- **AI deal summaries are not editable (today):** Although methodology responses *are* editable by reps in case of mistakes/incompleteness.
- **No raw recordings/transcripts or API access:** Processed then discarded – privacy-friendly, but limits reprocessing/custom NLP.
- **Broader “system-of-action” still maturing:** Draft-email exists; tools that take actions on systems outside the chat client (e.g., CRM) are roadmap (H1'26).

WHO IT'S FOR

- **GTM teams** prioritizing data integrity, methodology adherence, and manager coaching with clean CRM sync and governed writebacks.

WHO IT'S NOT FOR

- **Teams needing live voice coaching** or heavy phone-call ingestion
- **Orgs seeking broad cross-system automations** immediately



WBD APPROVED

Recognized as a strong choice when you need clean, complete GTM data and measurable methodology adherence managers can coach against.

CORE FEATURES WE VERIFIED

Data Foundation: automatic capture/patented matching
ClosePlan: scorecards + relationship maps to enforce qualification and visualize buying groups
SalesAI & Forecasting: deal/account summaries, SPICED-aware Q&A, and forecasting on real activity
Multi-deal & post-close writebacks: update multiple open deals at an account and support CS use cases
Assistant coverage: text/chat can “talk to” a meeting, deal, or company, plus cross-deal/company insights

PRICING SNAPSHOT

- [Contact People.ai](#) directly for pricing details

HOW IT COMPARES (HIGH-LEVEL)

- **People.ai vs. Momentum/Sybill:** CRM-centric operationalization vs. orchestration peers with agents that run across Salesforce, Slack, and email
- **People.ai vs. Salesroom/Demodesk:** Post-meeting CRM operationalization vs. live meeting environments with in-call guidance
- **People.ai vs. Fathom:** CRM-grade mapping and methodology enforcement vs. call fidelity and search

HOW WE SCORED:

Category	Weight	Score
Data capture quality & integrity	30%	9.4
Methodology alignment & coaching	20%	9.1
Agentic workflows & automation	20%	8.5
AI guidance (search, assist)	15%	8.6
Ecosystem/integrations	10%	8.5
Governance & reporting	5%	8.8
Overall		8.9/10

To learn more about **people.ai**

Visit [website](#) or [book a demo](#)



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