



Clari Revenue Platform

Reviews, tips, and advice from real users



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Product Recap



Clari Revenue Platform

Clari Revenue Platform Recap

Clari Revenue Platform is designed to enhance revenue operations with its powerful analytics and forecasting capabilities. It aims to streamline processes for revenue teams, providing clarity and predictability in sales activities.

Clari Revenue Platform offers a comprehensive suite of tools for revenue optimization. It integrates data sources to deliver actionable insights and supports sales managers in improving pipeline visibility and analytics. By automating repetitive tasks, it allows users to focus on strategic activities, ensuring that sales forecasts are more accurate and reliable, which contributes to making informed decisions that drive growth and efficiency.

What are the key features of Clari Revenue Platform?

- **Pipeline Management:** Real-time view of sales pipeline to identify opportunities and risks.
- **Forecasting:** Proactive insights into revenue potential and sales performance.
- **Activity Tracking:** Automated tracking of sales activities for better accountability.
- **CRM Integration:** Smooth syncing with CRM systems for data consistency.
- **Deal Inspection:** Granular analysis of deal progress and team performance.

What benefits should users evaluate?

- **Improved Forecast Accuracy:** Better predictability in sales outcomes.
- **Enhanced Decision Making:** Data-driven insights for strategic planning.
- **Increased Productivity:** Automated processes reduce manual workload.
- **Scalability:** Adapts to growing business needs efficiently.
- **Revenue Growth:** Identifies growth opportunities quickly for faster action.

Clari Revenue Platform is particularly effective in industries with complex sales processes like technology, healthcare, and financial services. Its implementation allows businesses in these sectors to benefit from enhanced visibility and control over their sales cycles, enabling precise tracking and forecasting capabilities tailored to industry-specific demands.

Valuable Features

Excerpts from real customer reviews on PeerSpot:



“Clari Revenue Platform has positively impacted my organization by saving an enormous amount of time in terms of reporting and visibility, as people now have access full-time, 24 hours a day to their real actual pipeline versus waiting on a Salesforce report or dashboard to update in Salesforce, with more real-time visibility adding to better accelerated results.”



Jcangas Kangas

Channel Development Manager at a consultancy with 11-50 employees



“Since this year, we started a new forecasting methodology, and Q1 was the best Q1 we have ever had, and we were really on top of forecast, with forecasting accuracy at plus or minus 10%, which is very good based on our history.”



Gabriela Palacio

GTM Strategy and Analytics Manager at a consultancy with 201-500 employees



“Win rates, which you can see in the analytics modules of Clari Revenue Platform, have increased from around 5% in certain regions up to more than 25%, which is a massive shift.”



Verified user

Senior Sales Operations Analyst at a tech vendor with 10,001+ employees

- ✓ “After implementing Clari Revenue Platform, my organization experienced better team collaboration and fewer errors because we had one tool that was easy to interface with Salesforce, allowing us to move away from spreadsheets and eliminate some of the errors and cycle time associated with maintaining a separate tool.”



Verified user

Sales Operations Director at a computer software company with 51-200 employees

- ✓ “There was a massive improvement in forecast accuracy, primarily because I was the first RevOps hire, and we started using Clari Revenue Platform for forecasting, monitoring the forecasting activity for the reps, and in a few months, the accuracy improved from about 60-70% to almost 90-95%, so it certainly had an impact.”



Aditya Srinivasan Head Of Revenue Operations(APJ

Head of Revenue Operations (APJ) at a tech vendor with 1,001-5,000 employees

- ✓ “When I'm rolling up to leadership, the board, or investors, being able to provide realistic, accurate data without having to do a bunch of manual things to get that information is invaluable, and the timeline is very quick.”



Verified user

Named Account Manager at a tech vendor with 10,001+ employees

What users had to say about valuable features:

“The best features Clari Revenue Platform offers include a live, 24/7 real-time integration with Salesforce that enables you to trust the numbers that you see. In contrast to forecasting that is done outside of your CRM in spreadsheets, Clari Revenue Platform provides real-time information that can be updated in the tool and immediately reflected in Salesforce..”

Verified user

Sales Operations Director at a computer software company with 51-200 employees

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“Clari Revenue Platform's best features primarily include the clear visibility of future pipeline as well as the historical context of opportunity management by aggregating conversational context, document sharing, and timeliness of responses.

When I mention aggregating conversational context and document sharing, those features give better clarity and visibility into the actual scoring of a lead or an opportunity based on the historical communication cadence of the representative and the customer..”

Jcangas Kangas

Channel Development Manager at a consultancy with 11-50 employees

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“The best features Clari Revenue Platform offers are forecasting and recording, as it is quite convenient to have all of that in one place.

“The features of Clari Revenue Platform that stood out to me are the ease of use of the platform and its well-known status, as I think most RevOps professionals use it, so it is mostly the convenience.

“Clari Revenue Platform has positively impacted my organization by making it very easy for forecast calls and essentially just monitoring rep conversations and getting feedback with the reps on how to improve further.

“There was a massive improvement in forecast accuracy, primarily because I was the first RevOps hire, and we started using Clari Revenue Platform for forecasting, monitoring the forecasting activity for the reps. In a few months, the accuracy improved from about 60–70% to almost 90–95%, so it certainly had an impact..”

Aditya Srinivasan Head Of Revenue Operations(APJ)

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Head of Revenue Operations (APJ) at a tech vendor with 1,001-5,000 employees

“The best features Clari Revenue Platform offers are insights on how your pipeline is progressing and where you are actually slipping. The notes and quality indicators for different opportunities are also valuable. Pipeline insights and quality indicators from Clari Revenue Platform have helped my team make decisions. For example, we noticed that we were losing opportunities in early stages, and there was also a lack of rigor for filling out some fields, such as command of message or Medpic. This allowed us to really hold reps accountable and be more accurate in what opportunities we can actually believe in.

“I find it quite easy to understand the different graphs that the analytics part of Clari Revenue Platform offers. Clari Revenue Platform has positively impacted my organization by identifying key cases where we might slip. It has made us stay on top of how we are going to end a quarter, and it has made us be more bold in making decisions and taking risks because we have the information we need at hand. I can share specific outcomes that illustrate this positive impact. The way we have been using the tool has also improved. A new VP of Sales came in at the end of last year. For the last two years, we never hit quota or forecast, and we were always over-forecasting. Since this year, we started a new forecasting methodology, and Q1 was the best Q1 we have ever had. We were really on top of forecast, with forecasting accuracy at plus or minus 10%, which is very good based on our history..”

Gabriela Palacio

GTM Strategy and Analytics Manager at a consultancy with 201-500 employees

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“I think the best features Clari Revenue Platform offers are that it integrates with Salesforce. My organization uses Salesforce, and most organizations do. The ability to quickly see all of my opportunities with their dollar amounts, add it up in the different stages, and dive into whatever view I want of the quarter, next quarter, or the year is excellent. I appreciate the filters so I can properly see which opportunities I want to look at and the dollars associated and what stage the opportunity is in.

“Regarding how Clari Revenue Platform has positively impacted my organization, I believe it has had a positive impact. I cannot speak to what leadership was using prior, but I imagine that if you're not doing it with Clari Revenue Platform, it's a lot harder to get an accurate forecast on where deals are, the stages they're in, and more specifically the dollar amount. When I'm rolling up to leadership, the board, or investors, being able to provide realistic, accurate data without having to do a bunch of manual things to get that information is invaluable, and the timeline is very quick. When I add something or update in Salesforce, it's right there in Clari Revenue Platform.

“Faster forecasting is significant. Because it pulls in everything, I can do this in a couple of minutes, if not less. There are fewer errors because it's accurate and ties directly into Salesforce. I recognize that if my Salesforce isn't clean, it's pulling in what's in Salesforce, so then maybe it isn't accurate, but if I'm doing my job the right way, I'm creating real opportunities in Salesforce, so in theory, there should be fewer errors. There is absolutely better visibility for leadership for them to get a snapshot of their region. In terms of measurable improvements, it may be hard to measure, but I imagine that compared to what we did before manually, this is more accurate and quicker. This frees up time in everyone's day, and we're having a more predictable business..”

Verified user

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Named Account Manager at a tech vendor with 10,001+ employees

“Clari Revenue Platform has several best features. For me personally, Pulse and Trends are very useful. One of the most common questions I get in Sales Ops is whether we are likely to hit the number for the quarter or next quarter based upon the pipeline that we currently have. With Pulse, you get an AI prediction based upon historical trends as to where the platform thinks you will finish for a particular period, such as the quarter. This allows me to provide more accurate results for leadership. Trends look at previous quarters, behavioral shifts, busier times, quieter times and gives you a recommendation to how much pipeline you need to hit a certain number, but also where it expects you to finish for a particular period as a pipeline as a whole. This shows how the pipeline is going to then progress into future periods.

“In day-to-day work with Clari Revenue Platform, what I tend to emphasize to the sales managers is looking at opportunities with a close date in the period, so if we are looking at quarter pipeline, which are idle. I use the Flow analytics tool within Clari for this. Flow allows me to show the movement of opportunities whereby a stage movement, a forecast stage change, a value of the opportunity change, or even just next steps can be displayed. It allows me to point out to managers where opportunities are stalling so they can go back to their team, not just take their word for it, but actually show the team with evidence that an opportunity seems to be struggling. They can have a conversation with the rep and potentially either close the opportunity or have a meeting to discuss how they are going to progress it further. This has led to an improved win rate in my particular organization.

“Clari Revenue Platform is a much more simple version of Salesforce. What we normally find in Sales Ops is because of the amount of fields and the amount of reports which can be created within Salesforce, it is very easy for a sales manager to get lost or not find what they need or even create reports with the incorrect information. What Clari does is it takes the fields that are used most regularly, puts them into the inspect, and allows the sales managers to create reports more easily, giving the information they need more efficiently. Less training is required and it is a more manageable platform. It has reduced the time needed by managers to find what they need. It has improved the completion of fields within Salesforce by the sales reps, which then gives better information. It has also improved the accuracy of forecasting rather than just using an Excel spreadsheet.

“Win rates, which you can see in the analytics modules of Clari Revenue Platform, have increased from around 5% in certain regions up to more than 25%, which is a massive shift. I believe that has been caused by the use of Clari for field completion and forecasting, but also the analytics modules to check the validity of opportunities and to allow managers to catch stalled opportunities faster and rework them with their team..”

Verified user

Senior Sales Operations Analyst at a tech vendor with 10,001+ employees

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Other Solutions Considered

“I evaluated various options in the market before choosing Clari Revenue Platform, but for the use case that we needed, Clari Revenue Platform seemed to be the best fit..”

Aditya SrinivasanHead Of Revenue Operations(APJ)

Head of Revenue Operations (APJ) at a tech vendor with 1,001-5,000 employees

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“Before Clari Revenue Platform, I essentially was the one who brought in Clari Revenue Platform. There was no solution prior in my previous organization, but I have obviously used other tools in all my various roles..”

Aditya SrinivasanHead Of Revenue Operations(APJ)

Head of Revenue Operations (APJ) at a tech vendor with 1,001-5,000 employees

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“I was not in the decision-making process before choosing Clari Revenue Platform, but I believe Gong or Outreach were evaluated, though I think they did not have an advanced forecasting module..”

Gabriela Palacio

GTM Strategy and Analytics Manager at a consultancy with 201-500 employees

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“Before Clari Revenue Platform, we relied fully on Salesforce. The reason for going with Clari was to simplify the Salesforce process because we had different countries using the same instance, but those people would use different fields. We wanted the platform which could be bespoke to different regions to simplify their day-to-day and to allow them to manage their pipeline whilst on the go..”

Verified user

Senior Sales Operations Analyst at a tech vendor with 10,001+ employees

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ROI

Real user quotes about their ROI:

“I have seen a return on investment with Clari Revenue Platform through improvements in efficiency. I improved forecasting accuracy by around 10% in a year, which also depended on the person actually leading the team that was using Clari, as well as better visibility on our pipeline quality..”

Gabriela Palacio

GTM Strategy and Analytics Manager at a consultancy with 201-500 employees

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“I have certainly seen a return on investment, focusing on the time saving, as the amount of time it used to take to aggregate forecasting reports and present those to teams has diminished, with the ability to look at Clari Revenue Platform live on conference calls regarding forecasting saving an enormous amount of time that used to take more preparation time for the sales and operations team..”

Jcangas Kangas

Channel Development Manager at a consultancy with 11-50 employees

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“I think you have seen a return on investment with Clari Revenue Platform. The team are hiring specific people to manage the platform rather than just relying on the sales operations, which they would not do if they were not seeing a return. Also, I am seeing a lot of strong usage and how usage has increased over the period of time that it has been around. The team in North America who were using Clari before the UKI team have seen a great return on investment, which is why it has expanded into the UKI..”

Verified user

Senior Sales Operations Analyst at a tech vendor with 10,001+ employees

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Use Case

“My main use case for Clari Revenue Platform is forecasting. I use Clari Revenue Platform with the VPs of sales from different regions to check the health of opportunities and see how accurate we are versus quota and versus plan.

“I also use Clari Revenue Platform extensively for dashboarding, and I can see top performers and data problems that we have..”

Gabriela Palacio

GTM Strategy and Analytics Manager at a consultancy with 201-500 employees

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“My main use case for Clari Revenue Platform is in a closing role carrying a quota, submitting my forecast for each quarter or the year or individual weeks, in terms of what opportunities and deals I'm working, the stages they're in, and the timeline of when they should close for rolling up my forecast.

“For the most part, that's it. I think it's a good visual so I can get a quick snapshot of where I'm at individually for the quarter in terms of how much more pipeline I need to generate, and also maybe if or where I'm short, or if I've had a good quarter and I'm over my number. It gives me quick visuals instead of having to do the math or do it manually..”

Verified user

Named Account Manager at a tech vendor with 10,001+ employees

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“My main use case for Clari Revenue Platform was primarily for the reps and then monitoring rep conversations, interactions, and essentially getting a forecast summary as well for their forecasts.

“A specific example of how I used Clari Revenue Platform for monitoring rep conversations or forecasting is that I usually run it during the forecast calls and use the Clari Revenue Platform view to reflect on the forecasts, running the call directly through that, and I would try to ensure that the reps talked to the customers leveraging Clari Revenue Platform, and those recordings or conversations would also help generate some battle cards and customized responses for future conversations..”

Aditya Srinivasan Head Of Revenue Operations(APJ)

Head of Revenue Operations (APJ) at a tech vendor with 1,001-5,000 employees

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“My main use case for Clari Revenue Platform is improved and enhanced visibility into forecasting and revenue recognition.

A specific example of how I use Clari Revenue Platform for forecasting is the migration from manual processes in Salesforce to integrating Salesforce forecasting and opportunity pipeline into Clari Revenue Platform, which gives visibility by region, by geography, by sales team, and by vice president.

Clari Revenue Platform solved the particular challenge of removing the silos of the prior forecasting module, which prevented cross-visibility from geographies..”

Jcangas Kangas

Channel Development Manager at a consultancy with 11-50 employees

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“Clari Revenue Platform's main use is for forecasting, asking the sales reps to submit weekly commit, forecast, upside and pipeline numbers. This is then rolled up to their managers who do the same based upon their team submissions. This then rolls up to directors and then up to the VP. This is used for all products in the business to give a picture to the board of how well the business is performing on a weekly and quarterly basis.

“For renewals on Clari Revenue Platform, we have a quota for all the team which looks at the expected value of a potential contract based upon the current spend of the customer. We then apply an uplift and that calculates their quota based upon the customer satisfaction. The sales rep will then build the opportunity, build the quote, run through the different forecasting statuses, negotiate with the customer. This will allow the commercial operations team to analyze the performance of the rep, the movement of the opportunity through the negotiation phase and how accurate the submission of the forecast is by the rep versus the actual outcome of the opportunity. We can see how accurate the forecast submitted by the rep is.

“The main use for Clari Revenue Platform is the waterfall feature within the analytics module. This is used to measure pipeline movement over a month or a quarter. This is used in QBR sessions with leadership to analyze the validity of the pipeline. Has the pipeline successfully moved through the stages or is it being kept a hold of by reps to avoid losing the potential of the opportunity in the future? It's also used to determine metrics such as length of time in pipeline and push counts to maximize the accuracy of the pipeline..”

Verified user[Read full review](#) 

Senior Sales Operations Analyst at a tech vendor with 10,001+ employees

Setup

The setup process involves configuring and preparing the product or service for use, which may include tasks such as installation, account creation, initial configuration, and troubleshooting any issues that may arise. Below you can find real user quotes about the setup process.

“I did not purchase Clari Revenue Platform through the AWS Marketplace in my previous organization. We had a Clari Revenue Platform rep who we were in touch with, and they coordinated the subscription via DocuSign..”

Aditya Srinivasan Head Of Revenue Operations(APJ)

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Head of Revenue Operations (APJ) at a tech vendor with 1,001-5,000 employees

Customer Service and Support

“I find the customer support for Clari Revenue Platform great. Any issues I've had, not that I've really had any, or anyone I know, get resolved very quickly..”

Verified user

Named Account Manager at a tech vendor with 10,001+ employees

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“The customer support for Clari Revenue Platform is good but sometimes not super helpful. Many times we encounter blocks, and in the end, it is up to our internal teams to solve it. I would rate the customer support of Clari Revenue Platform a seven..”

Gabriela Palacio

GTM Strategy and Analytics Manager at a consultancy with 201-500 employees

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“Clari Revenue Platform's customer support is excellent, and I think they do provide an incredible amount of hands-on experience during implementation, with customer success managers being fantastic as well.

I would rate the customer support a 10..”

Jcangas Kangas

Channel Development Manager at a consultancy with 11-50 employees

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“Customer support for Clari Revenue Platform in my opinion is brilliant. I know a couple of the support team by first name and we speak regularly. They are quick to respond, they are quick to understand what the problem is and advise if it is a Salesforce issue or if it is actually a Clari problem, but also they explain things in a clear way so that you can get the support you need internally if they are not able to provide it. I would rate the customer support at eight to a ten regarding how I would rate it. This is very high. I am definitely a promoter of customer support..”

Verified user

Senior Sales Operations Analyst at a tech vendor with 10,001+ employees

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Other Advice

“I think as I evaluate Clari Revenue Platform, I should compare what I'm doing today compared to that and how much time it would save, and also how much more accurate my forecast can be. I would suggest thinking about the cost of doing nothing. I would rate this product nine out of ten..”

Verified user

Named Account Manager at a tech vendor with 10,001+ employees

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“I would rate Clari Revenue Platform a seven on a scale of one to ten. I think a seven is a very good score for Clari Revenue Platform, as ten is perfect, and nine and eight are for products that are without fault. Regarding Clari Revenue Platform's AI capabilities, I think the security was up to par, matching whatever levels of security Salesforce provides. I feel if you are opting into Salesforce and that ecosystem or HubSpot, Clari Revenue Platform is certainly no more or less secure than the CRMs that you are already sharing personal information with. I am not familiar with any of the accuracy or reliability components of Clari Revenue Platform..”

Verified user

Sales Operations Director at a computer software company with 51-200 employees

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“Regarding Clari Revenue Platform's AI capabilities, I think its accuracy and reliability of output are more or less. I honestly do not use it much to guide our forecast, as I believe it is more accurate when you see it from a field point of view.

My advice to others looking into using Clari Revenue Platform would be that if you are lacking accuracy in forecasting and want more rigor to know your sales and metrics, go for it. It is very good and very intuitive to use. I would rate Clari Revenue Platform an eight. I choose an eight because it is quite high. I think it does the job very well, but I think for it to be a ten, I would like it to be my real go-to place to find top-to-bottom insights and to be able to customize it to my exact needs..”

Gabriela Palacio

GTM Strategy and Analytics Manager at a consultancy with 201-500 employees

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“I would say that as long as you have a strong use case in terms of your company having issues with managing pipeline, looking at close dates, idle opportunities and you have a poor win rate, Clari Revenue Platform will make a difference to your organization. What I will say is that it is more geared for an enterprise level than perhaps an SME. You need to make sure you get your ducks in a row in terms of stages for your pipeline, your forecast, your closed dates, but most importantly, your Salesforce hierarchy so management can see all of the opportunities which are relevant to them in their different teams. Clari is an excellent tool, but it requires a lot of homework before you onboard it.

“Clari Revenue Platform is a good platform. It is solid, it is stable, it is reliable. It is very straightforward to use. The solutions engineers do a good job of getting you up and running. You have an account manager who looks after you post implementation. The customer support is very strong and it does achieve what it says it will achieve for you. I would rate this review overall at a seven..”

Verified user

Senior Sales Operations Analyst at a tech vendor with 10,001+ employees

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“On a scale of one to 10, I would rate Clari Revenue Platform an eight. I do not think there is any revenue solution out there that is worthy of a 10 with ongoing improvements, but certainly, Clari Revenue Platform gives clear visibility and very good actual insights that organizations need to rely on day-to-day to operate the business.

Regarding Clari Revenue Platform's AI capabilities, I think the governance and security are solid, as the more you can rely on the information, current standards, and current regulations that it can manage on its own, then the less you have to focus on that.

Regarding Clari Revenue Platform's AI capabilities, I think the accuracy and reliability of output are in constant improvement mode, also just a cultural shift and trust, so ensuring that the organization, from the initial application of AI, is going to be a little skeptical, so the more reliability, the more it hits the mark on a day-to-day basis, the trust will continue to improve.

The main advice I would give to others looking into using Clari Revenue Platform is to be very open about your existing processes and limitations..”

Jcangas Kangas

Channel Development Manager at a consultancy with 11-50 employees

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“I am not really sure about the governance and security of Clari Revenue Platform, but I am quite confident that it is secure, and I am sure a lot of work has been done recently to solidify that, so I feel secure using Clari Revenue Platform as a platform and believe the data will be secure.

“In terms of the accuracy and reliability of Clari Revenue Platform's AI capabilities, I acknowledge this is where there can be a bit of improvement, but it does the job.

“Clari Revenue Platform is not deployed in my current organization at the moment. We use Media.io for forecasting.

“I would rate Clari Revenue Platform a seven on a scale of 1 to 10. I give it a seven primarily because it does the job, it is well-known and easy to use for the reps, and because it has all of that in one place. I would likely give a higher score of eight or nine if it were to incorporate some of the features that [Gong](#) does as a revenue intelligence platform or as Attention does as a rep activity and conversation monitoring and insights platform.

“My advice for others looking into using Clari Revenue Platform is to assess whether it fits your use case, as it is a good platform that does a job for most revenue operations functions across the world and industries. However, if you have special use cases with advanced requirements, I would recommend exploring specialized tools.

“Clari Revenue Platform is a platform I have used, it is easy to use and convenient, and depending on the use case, I would surely recommend it..”

Aditya Srinivasan Head Of Revenue Operations(APJ)

Head of Revenue Operations (APJ) at a tech vendor with 1,001-5,000 employees

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Top Industries

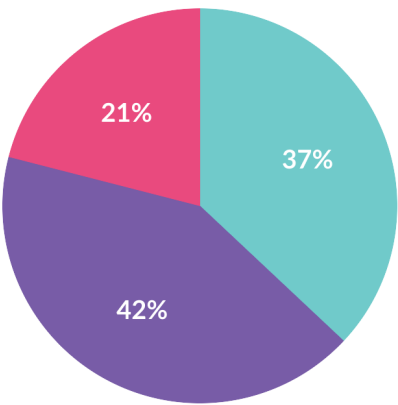
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Company Size

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Large Enterprise Midsized Enterprise Small Business

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244 5th Avenue, Suite R-230 • New York, NY 10001

reports@peerspot.com

+1 646.328.1944