



imparta[®]



Wolters Kluwer

Meta

Tightening Qualification Without Slowing Down the Team

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Today's panelists

Tightening qualification without slowing down the team



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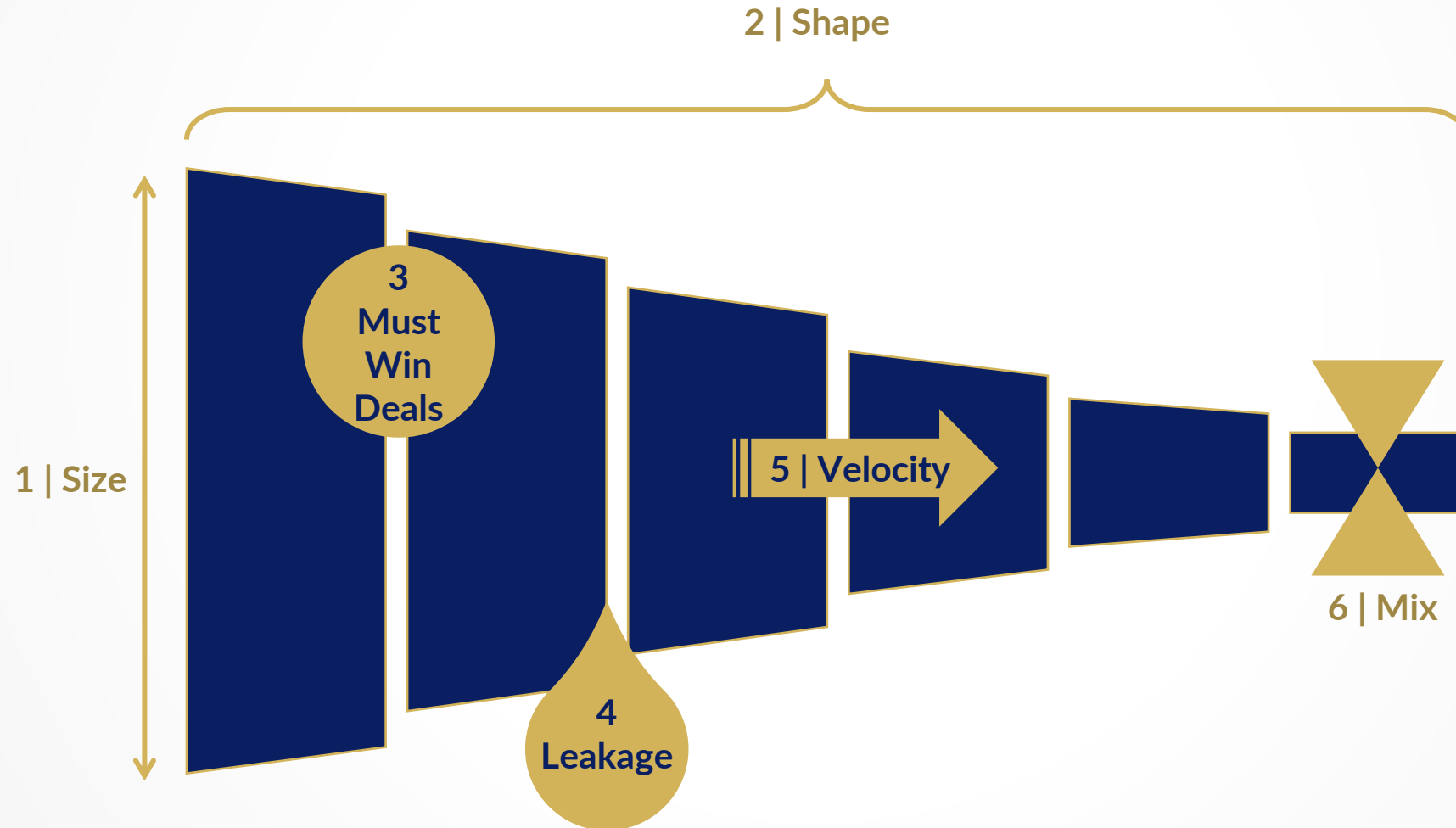
Continuous performance enablement

One continuous loop connecting learning and performance, delivered by AI, managers, and trainers



What should we look at in the pipeline?

Use the data as a way to bring insight to the pipeline discussion



How would you set goals for each metric?

Set positive goals (“achieve this”), not negative ones (“fix this”) to reduce stress & increase motivation



1 | Size

- What size does your pipeline need to be to achieve target?
- How does your pipeline compare to the rest of the team?
- What is a realistic increase before our next review?



2 | Shape

- Which pipeline stage do you need to fill?
- What can you realistically add to your early pipeline?
- What do you need to close out of your late-stage pipeline?



3 | Must-Win Deals

- What progression would you like to achieve with your key deals before our next review?
- What specifically do you need to do in each must-win deal?



4 | Conversion Rates

- What conversion rates between stages would you like to see in your pipeline?
- What do you need to achieve to create that change?



5 | Velocity

- What is your target for average sales time?
- What would you like to achieve with your slowest deals?



6 | Product Mix

- What is your target product mix?
- What do you need to sell more of/less of to achieve that?

ICP: The Five Ws

Who

Who should you target, in which departments?

Aim for a Center of Receptivity, in functions where there's an opportunity

DON'T GO TOO HIGH!

Where

Where should you look (organizations & BUs)?

Identify the ideal profile of new customers (size, industry, issues, attitudes)

Also find other Business Units within existing customers that also fit this profile

When

When is the best time to approach people?

When there is a clear need or triggering event
When they are actively searching

During the run-up to contract renewals
1-3 months after starting a new role

What

What message should you use with them?

Core message comes from the Value Sweet Spot – insights around:

- Customer needs & how they are changing
- Your solutions

The more specific the better

Why

Why are you trying to engage with them?

Create a conversation
Test your Value Chain and Sweet Spots

Identify the Center of Need

NOT TO SELL!



AI Integration

i-Coach[®]AI: Personalized enablement

i-CoachAI makes every seller a top performer



PERSONALIZED

- Understands the user's role, context, goals and strengths
- Remembers past discussions
- Looks for patterns
- Delivers deeply tailored coaching, training, insights, roleplays and more



PROACTIVE

- Gets in touch to follow up on coaching conversations, driving accountability and results
- Suggests ideas proactively to front-line staff and managers alike, to help drive performance



POWERFUL

- Draws on 1.5 million words of researched best practice across sales, service and management
- Taps into your own data sources
- Deliver expert, adaptive support, coaching, and learning



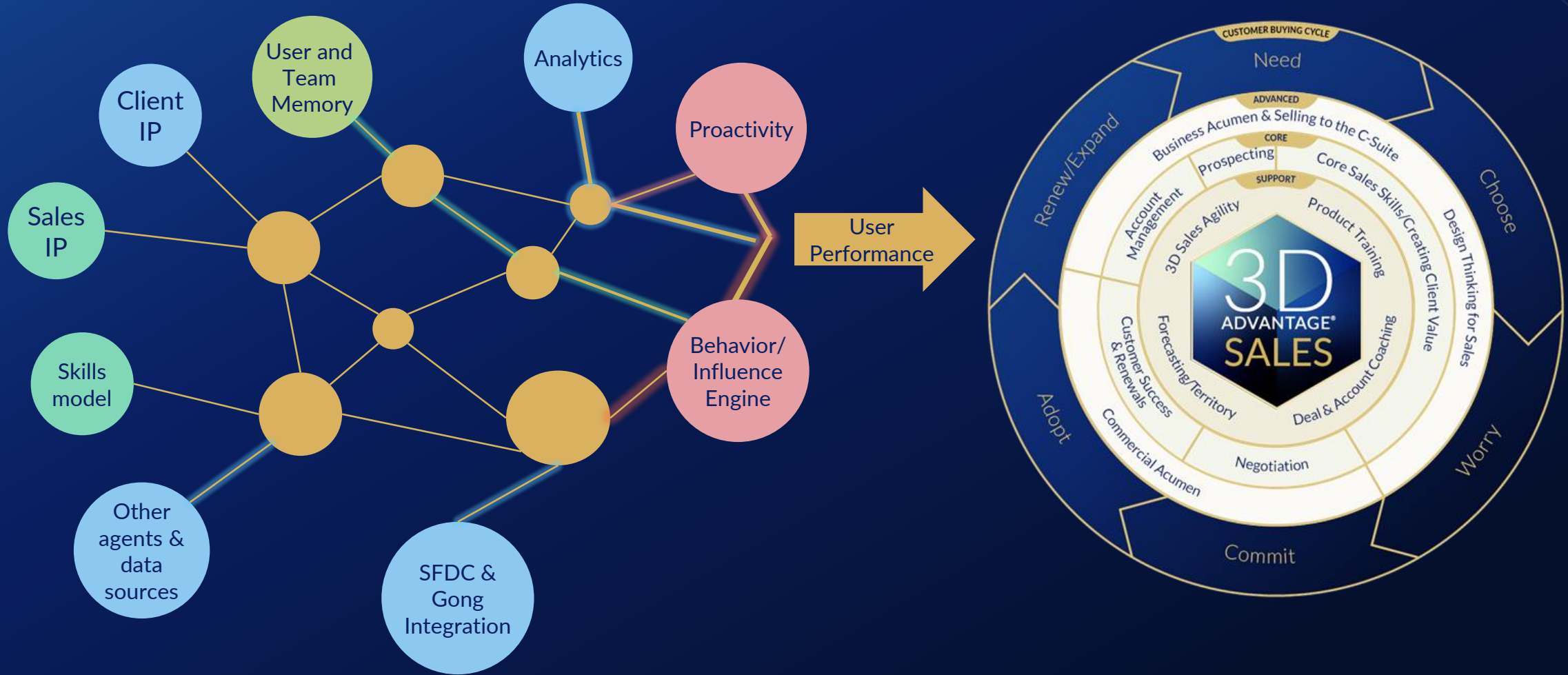
INTEGRATED

- Fits into your tech stack as an orchestrator (we offer text, voice and video avatar options)
- Can be connected as headless agents to your existing AI and learning ecosystem

i-Coach[®]AI

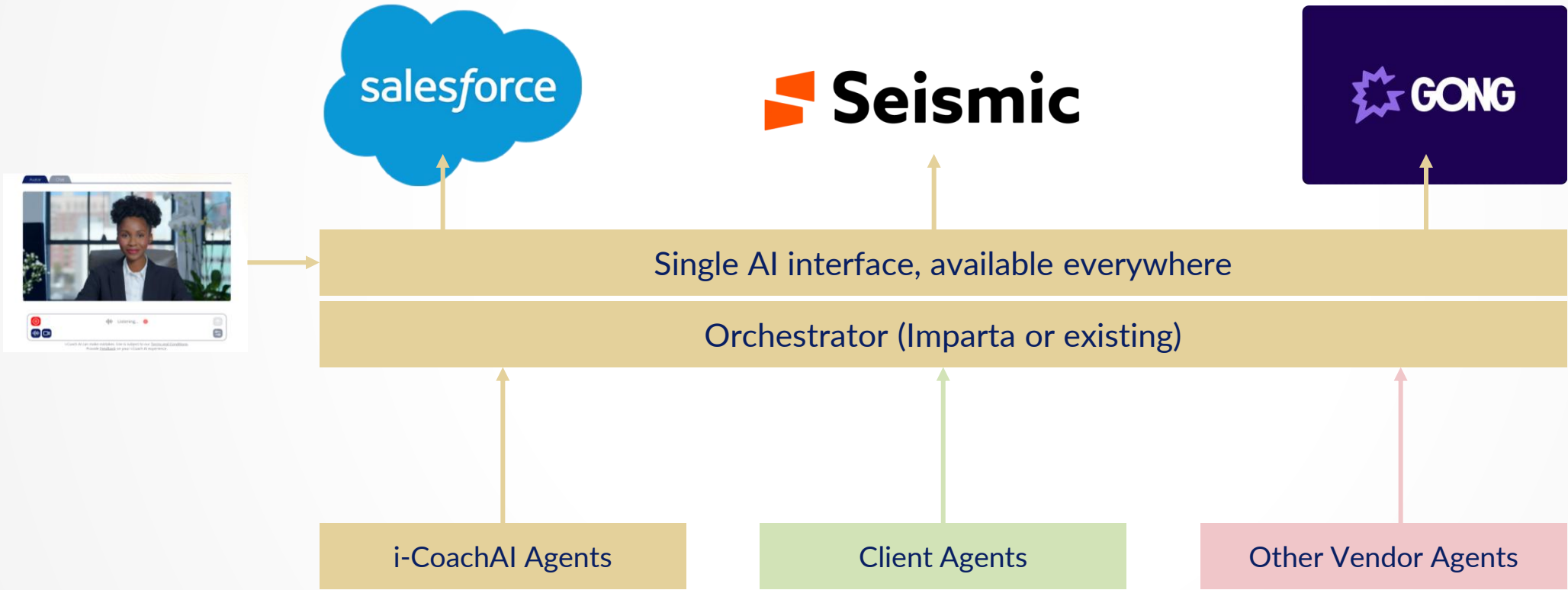
Performance-Enhancing AI[™]

A powerful, proactive, personalised agentic network that changes seller behaviour



Agentic integration

i-Coach® AI can integrate into (or even orchestrate) an enterprise, multi-vendor AI architecture



Sales Coaching



i-GROW

Immersion

What is the issue? How are you feeling?

Goal

What do you want to achieve?

Reality

Where are you at the moment?

Options

What could you do to achieve your goal?

Way Forward

What *will* you do, when?

INSIGHT

- Help define the issue, e.g., using Buying Cycle
- Offer constructive feedback

- Help to set SMART goals
- Help to prioritize goals

- Explore Skill, Will, and Way
- Explore root causes

- Use creativity tools if necessary
- Help to select the best option

- Ask insightful questions (plan, resources, risk, follow-up)

INFLUENCE

- Focus on feelings as well as facts & issues
- Actively listen

- Set positive goals, not negative ones

- Ask insightful questions

- Ask, more than tell or suggest

- Use loss aversion
- Create a compelling vision for the future

TRUST

- Be fully present
- Build rapport
- Focus on them

- Ensure the goals are theirs

- Show a real desire to understand

- Remain primarily focused on their self-discovery

- Congratulate them
- Seek to understand how they feel now

Imparta experience

A sample of relevant clients

