SALESBOXAI

Whitepaper

How AI Agents Optimize Every Stage of the Forrester B2B Revenue Waterfall

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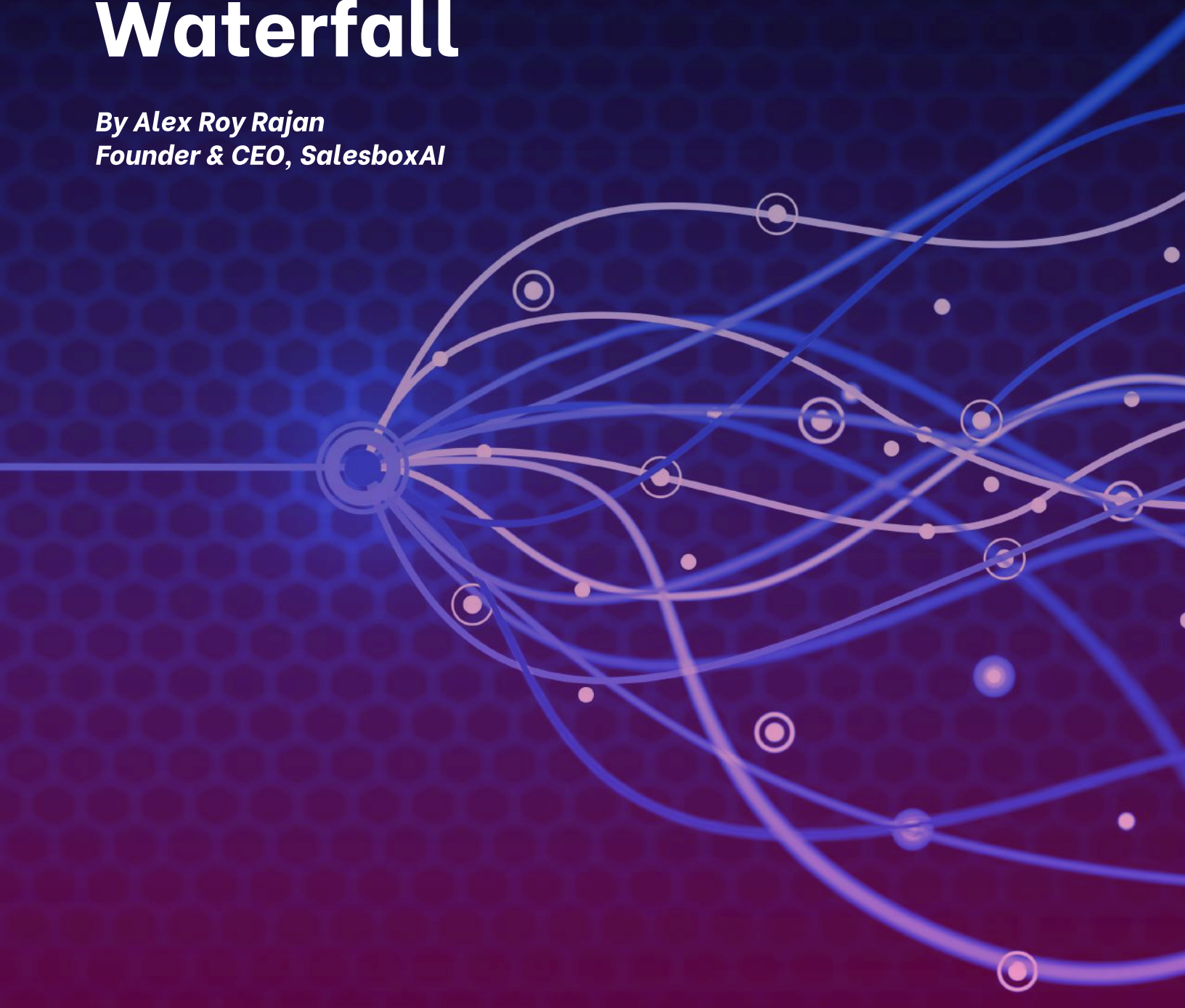

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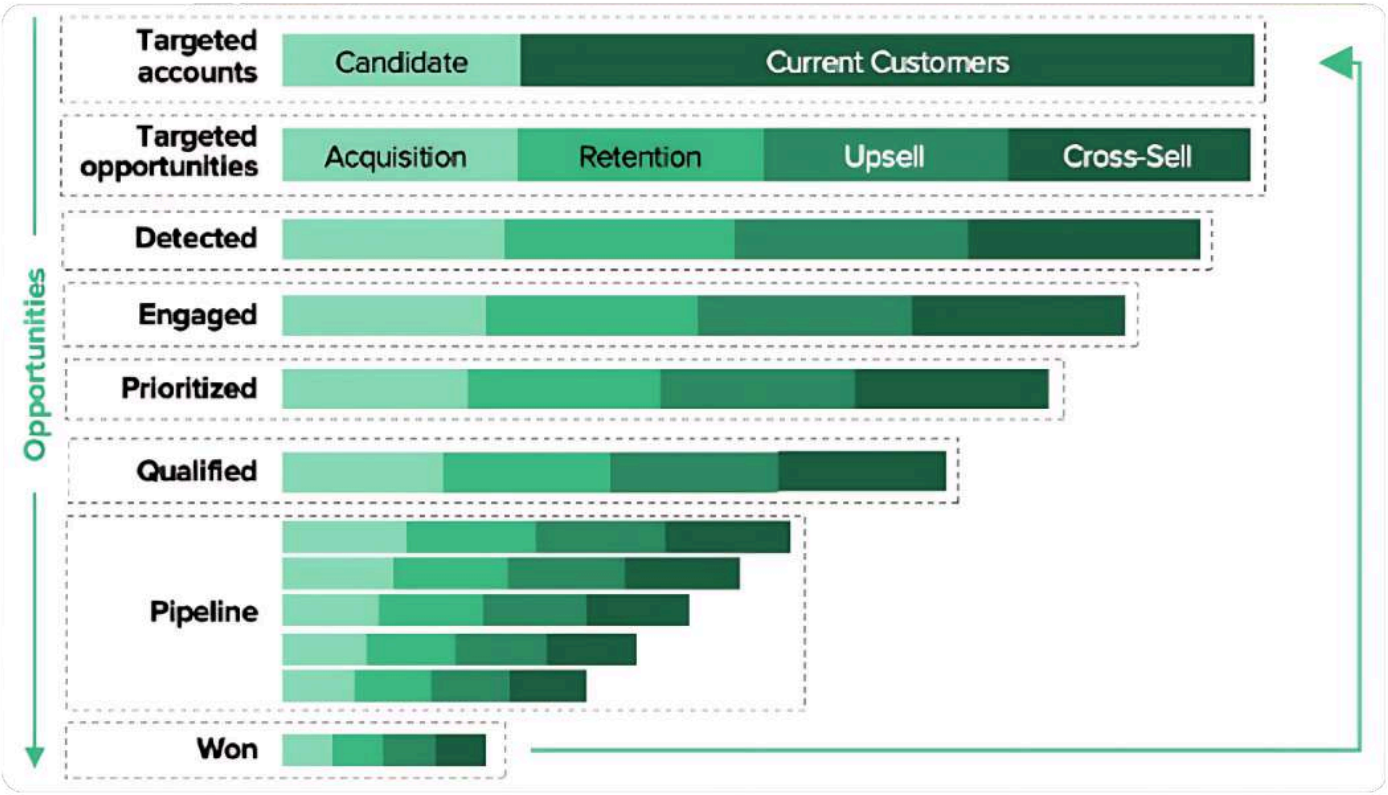
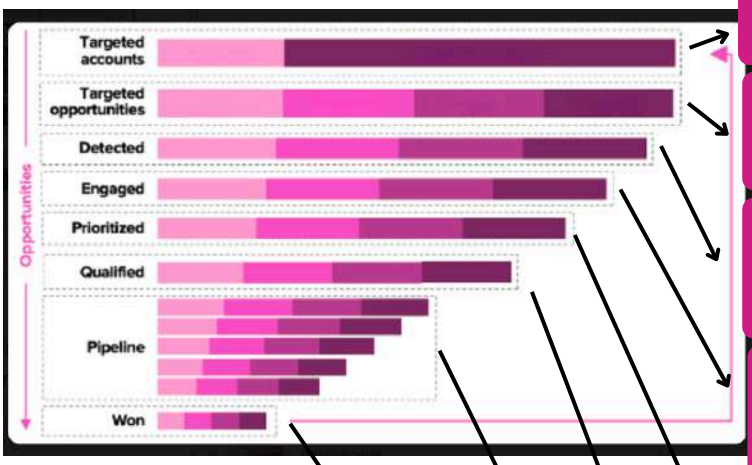
The **Forrester Revenue Waterfall** modernizes demand management by focusing not just on leads, but on **buying groups, account-level insights, and revenue impact.** By embedding **AI agents** at every stage, organizations can automate intelligent decisions, scale personalized engagement, and create a more predictable path to revenue.

Unlike traditional automation tools, **AI agent driven systems are autonomous systems that handle specialized tasks**– continuously learning, adapting, and acting to accelerate revenue outcomes.



Source: Forrester's B2B Revenue Waterfall 2021

How Native AI Agents Can Supercharge Every Stage of the B2B 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

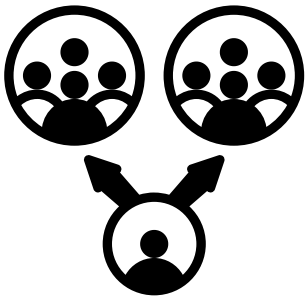
- AI analyzes engagement, fit, firmographic & intent signals to generate lead scores & prioritize opportunities based on conversion likelihood
- Continuous updation of opportunity prioritization–AI identifies the most engaged roles and prioritizes the account accordingly

- 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

Identify Buying Group from the Right Accounts (Target Demand)



Goal: *Surface in-market buying groups within your total addressable market (TAM).*

AI Agent's Role:

- **Identify the Right Accounts:** Continuously monitor accounts within TAM that match the ICP based on F-I-T signals (firmographic, intent, and trigger).
- **Discover New Buying Group Members:** Identify new buying group members that match the persona definitions of the Buying Group.
- **Monitor the Buying Group:** Review changes in title or company of the Buying Group, analyze new content published by the Buying Group on an ongoing basis. Make updates to the Buying Group based upon observed changes in role.

Detecting Opportunities (Active Demand)

Goal: *Spot early intent signals and convert them into Early Stage Opportunities.*

AI Agent's Role:

- **Intent Signal Agent:** Listens for Contact and Account Level Intent Signals from different sources and aggregates them to highlight high-interest accounts.

Engaging Buying Groups

Goal: *Orchestrate high-quality engagement across buying group members.*

AI Agent's Role:

- **Personalization Agent:** Delivers customized omnichannel experiences and content based on individual roles within the group.
- **Email & Web Engagement Agent:** Conversational Agent that helps turn visits into conversations to increase time-on-site and conversion.
- **Scoring Agent:** Tracks engagement across group members to build a unified opportunity profile and prioritize Opportunities.

Qualifying Buying Groups

Goal: *Validate buying intent and readiness for sales.*

AI Agent's Role:

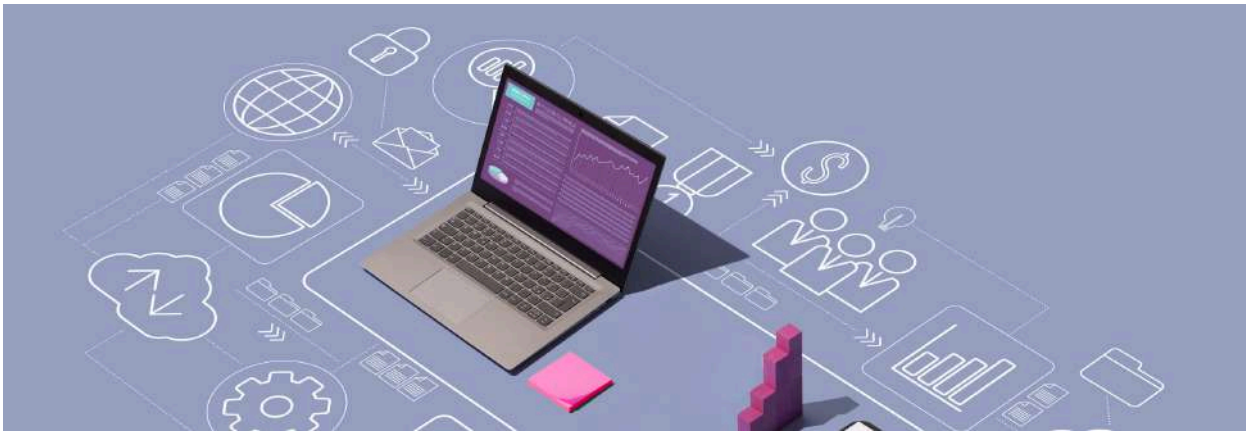
- **Qualification Agent:** Automates readiness assessment by analyzing the overall score, conversations, forms, and behavior.

Pipeline Acceleration

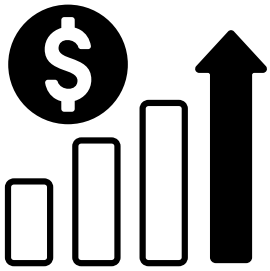
Goal: *Enable Sales to close the Qualified Deals sent over by marketing faster.*

AI Agent's Role:

- **Sales Enablement Agent:** Provides just-in-time insights and assets to sales based on buyer behavior.
- **Forecasting Agent:** Predicts deal velocity and close probability using real-time interaction data.
- **Deal Acceleration Agent:** Identifies opportunities stuck in the pipeline and suggests engagement strategies to re-activate them.



Revenue Realization and Expansion

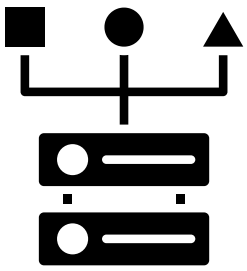


Goal: *Drive retention, renewal, and expansion from accounts that are won.*

AI Agent's Role:

- **Customer Health Agent:** Monitors adoption, satisfaction, and support data to predict churn or upsell readiness.
- **Growth Opportunity Agent:** Detects expansion potential and recommends next-offer plays.
- **Success Story Agent:** Identifies accounts suitable for case studies and referrals based on performance data.

Why AI Agents are Crucial for the Revenue Waterfall



In the Revenue Waterfall, success depends on tracking **buying group dynamics,** not just individual leads. Native AI agents make this possible by:

- ***Unifying account and persona-level signals***
- ***Continuously analyzing buying group behaviors***
- ***Automating contextual decisions across marketing and sales***
- ***Accelerating pipeline progression and revenue realization***

Final Word

As the buying journey becomes more complex and collaborative, the Forrester Revenue Waterfall provides the structure, and AI agents provide the intelligence. Together, they enable revenue teams to scale precision, act in real time, and stay ahead of the competition.