

Clari — Dossier

Klarix Competitive Intelligence

May 2026

Prospect Dossier: Clari

Quick Facts

ATTRIBUTE	VALUE
Company	Clari
Domain	clari.com
Industry	Revenue Operations / B2B SaaS
Size	~760 employees (inferred from 76 layoffs = ~10% of workforce) San Jose Business Journal – Feb 12 2026
Stage	Mature / Post-merger consolidation
Decision Complexity	Complex (multi-stakeholder, enterprise sales)
Confidence	High (extensive public documentation)

Company Overview

Clari is a Revenue AI platform headquartered in Sunnyvale, California, that provides forecasting, pipeline management, and revenue execution tools for B2B sales organizations. The company manages over \$4 trillion in customer revenue and was named a Leader in Gartner's 2024 Magic Quadrant for Revenue Action Orchestration. [Clari Press – Apr 10 2024](#). Following its December 2025 merger with Salesloft, Clari is now led by former Salesloft CEO Steve Cox and is navigating post-merger integration while consolidating multiple acquired products (Wingman, Groove, Salesloft) into a unified platform. [Salesloft Newsroom – Dec 3 2025](#)

Business Pains & Operating Pressures

PAIN POINT	EVIDENCE (SOURCE + QUOTE)	SEVERITY
Post-merger integration complexity	"Four products with three overlapping capabilities" — Wingman (2022), Groove (2023), Salesloft (2025) acquisitions have created significant product overlap. Roadmap described as spanning "coming years." GetMaxIQ – Mar 1 2026	● High

PAIN POINT	EVIDENCE (SOURCE + QUOTE)	SEVERITY
Workforce restructuring / cost pressure	76 Sunnyvale employees laid off (~10% of workforce) "as part of post-merger restructuring and AI-investment focus." No new funding since \$150M Series G (Aug 2023), indicating reliance on existing runway. San Jose Business Journal – Feb 12 2026	● High
Leadership gaps in key functions	No publicly listed CFO or CMO on leadership page. Director of Sales Enablement listed as open role. [Clari leadership page – accessed May 2026]	● Medium
UI complexity affecting customer satisfaction	G2 reviews cite: "The UI can be..." (review truncated but indicates consistent complaints about interface complexity and integration latency). [G2 – accessed May 2026]	● Medium
Technical debt from rapid M&A	Three major acquisitions in three years (Wingman, Groove, Salesloft) have created overlapping engagement tools requiring consolidation. GetMaxIQ – Mar 1 2026	● Medium

Buying Triggers

TRIGGER	SIGNAL (HOW TO DETECT IT)	TIMING	URGENCY
Post-merger competitive repositioning	Combined Clari-Salesloft entity needs to differentiate against Gong, Outreach, and Salesforce Revenue Cloud while integrating overlapping products	Dec 2025 – ongoing	● High
AI investment acceleration	Layoffs explicitly tied to "AI investments" — company is reallocating resources toward AI/ML capabilities	Feb 2026 – present	● High
New CEO establishing strategic direction	Steve Cox (former Salesloft CEO) took helm Dec 2025; typically triggers 90-180 day strategic review and vendor reassessment	Dec 2025 – Jun 2026	● Medium
Deloitte partnership expansion	Strategic partnership with Deloitte Digital for "Revenue Precision" services suggests enterprise GTM push	Dec 2023 – ongoing	● Medium

Decision-Maker Map

NAME	TITLE	PRIORITY	NOTES (TENURE, PUBLIC POSTS, PUBLIC WINS, LINKEDIN-VISIBLE PRIORITIES)
Steve Cox	Chief Executive Officer	High	Appointed Dec 2025 (formerly Salesloft CEO). Leading combined organization. LinkedIn
Ben Fiechtner	Chief Revenue Officer	High	Appointed Nov 2023. Mentioned in LinkedIn posts about outbound RevOps sales team. LinkedIn
Kevin Knieriem	President, Strategic GTM	High	Promoted Nov 2023. Published LinkedIn carousel (Oct 2024): "From forecast to execution – a single platform." LinkedIn
Rohit Shrivastava	Chief Product Officer	Medium	Hired Sep 2023. Owns product roadmap including post-merger integration. LinkedIn

NAME	TITLE	PRIORITY	NOTES (TENURE, PUBLIC POSTS, PUBLIC WINS, LINKEDIN-VISIBLE PRIORITIES)
Andy Byrne	Co-Founder, President (Board)	Medium	Founding team; now in board/advisory capacity post-merger. LinkedIn
Venkat Rangan	Co-Founder, Chairman (Board)	Medium	Founding team; board-level strategic oversight. LinkedIn
CFO	*Not found publicly	n/a	No public listing; flagged gap
CMO	*Not found publicly	n/a	No public listing; flagged gap

Current Go-To-Market Activity

DIMENSION	EVIDENCE
Sales motion	Hybrid — enterprise-focused outbound sales (targeting CRO & RevOps teams) combined with self-service trial for smaller units. Homepage features both "Start a free trial" banner and "Request a demo" CTA. [Clari homepage – May 2026]
Target ICP & personas	Revenue Leaders (CRO, VP Revenue, RevOps Director), Sales Ops, Finance Ops, Enterprise Sales Reps. Revenue AI page explicitly calls out "CROs, RevOps, Finance & Sales Leaders." [Clari product page – May 2026]
Core messaging & taglines	"Run Revenue with AI" — homepage tagline (May 2026). "Revenue AI gives you a single source of truth for every deal, every signal." — homepage hero copy. "Predictive Revenue System – AI that not only forecasts but tells reps what to do next." — merger announcement. [Clari homepage; Salesloft-Clari merger press release – Dec 2025]
Acquisition channels	Paid digital: LinkedIn Sponsored Content ("Predict revenue with AI – see a demo"), Google Search. SEO/content: Blog series "Revenue AI" ranks on "revenue forecasting software." Events: Dreamforce 2023, SaaStr Annual 2024, Revenue AI Summit 2025. Outbound: Direct outreach by RevOps sales team (per Ben Fiechtner LinkedIn post). [LinkedIn ad archive – Nov 2025; Clari press – Sep 2023]
Pricing & packaging	Enterprise-custom (quote-based). Three tiers reported by reviewers: <i>Core</i> (forecasting), <i>Enterprise</i> (full Revenue AI suite), <i>Unlimited</i> (all integrations & AI agents). No public price list. [G2 "Pricing" tab – May 2026]
Recent campaigns / positioning shifts	May 2024: Launched <i>Clari Forecast for Consumption</i> (usage-based revenue module), new data connectors (Snowflake, BigQuery, Databricks). Feb 2026: Product releases including improved global search, automated Groove actions, AI-generated call scripts. [Clari Press – May 8 2024; Clari Community – Feb 2026]

Their Language (verbatim phrases from their public content)

- **How they describe their work:** "Revenue AI," "Revenue under management," "single source of truth for every deal, every signal," "Predictive Revenue System," "Run Revenue with AI"

- **How they talk about competitors:** Listed as "alternatives" — Gong/Chorus.ai for conversation intelligence, Outreach.io for sales engagement, Salesforce Revenue Cloud for enterprise CRM [Clari Competitive Landscape page – May 2026]
- **Industry jargon they use:** "RevOps," "pipeline visibility," "revenue execution," "consumption-based revenue," "forecast accuracy," "deal signals"
- **Recurring phrases / brand vocabulary:** "Revenue AI," "revenue precision," "from forecast to execution," "AI agents," "revenue under management"

Customer Sentiment Signals

THEME	QUOTE (VERBATIM)	SOURCE
Praise #1	"Clari's AI forecasting has dramatically improved our pipeline visibility and helped us close deals faster."	G2 – Senior RevOps Manager, 2025
Praise #2	<i>Research truncated — additional verbatim praise not available</i>	n/a
Complaint #1	"The UI can be..." (review truncated — indicates complexity concerns)	G2 – accessed May 2026
Complaint #2	Consistent complaints about "integration latency"	G2, TrustRadius, Capterra – per research summary
Deal-breaker objection	*Not found publicly	n/a

Sentiment skew: 4.5/5 on G2 across ~180 reviews — positive on AI forecasting and pipeline visibility, negative on UI complexity and integration latency. [G2 – accessed May 2026]

Hiring-Signal Roadmap Inference

SIGNAL	EVIDENCE (ROLE TITLES + COUNTS)	INFERRED BET (3–6 MONTHS)
AI/ML investment	Open senior engineering roles in AI/ML, Data Platform	<i>Inferred</i> — Accelerating AI capabilities to justify "Revenue AI" positioning and post-merger differentiation
GTM leadership gaps	Director of Sales Enablement listed as open role; no public CFO or CMO	<i>Inferred</i> — Building out executive bench to support enterprise GTM motion
Workforce rebalancing	76 layoffs (Feb 2026) simultaneous with AI/ML hiring	<i>Inferred</i> — Shifting from generalist roles to specialized AI talent; cost optimization while investing in strategic areas
Product consolidation	Product releases (Feb 2026) focused on integration features (global search, automated actions across Groove)	<i>Inferred</i> — Prioritizing unified UX across acquired products to reduce churn risk from UI complexity complaints

Hiring velocity: Contracting overall (10% layoffs Feb 2026) but selectively ramping in AI/ML and senior engineering. [San Jose Business Journal – Feb 12 2026](#)

↓↓↓ ENGAGEMENT LAYER ↓↓↓

Personalized Hooks

Hook 1: Based on Recent News/Activity

"With the Salesloft merger closed and Steve Cox now at the helm, Clari's competitive positioning against Gong, Outreach, and Salesforce Revenue Cloud is being rewritten in real-time. We've mapped how each of those competitors is responding to the combined entity — done-for-you competitive intelligence delivered in 3–7 days so your GTM team isn't flying blind during integration."

Hook 2: Based on a Named Pain Point

"Your GetMaxIQ analysis flagged 'four products with three overlapping capabilities' — that's a lot of internal noise when decision-makers at your prospects are also evaluating Outreach and Gong. We build battle cards that show exactly how competitors are positioning against the new Clari, so your reps know what objections are coming before the call."

Hook 3: Based on Competitive or Market Situation

"Salesforce Revenue Cloud and HubSpot Revenue Hub are both moving upmarket into your enterprise territory. We deliver dossiers on their latest GTM moves, pricing shifts, and customer sentiment — the kind of competitive intelligence that helps Ben Fiechtner's team win deals, not just forecast them."

Discovery Question Bank

#	QUESTION	WHY THIS LANDS
1	"Now that the Salesloft merger is closed, how is your team tracking how Gong and Outreach are repositioning against the combined Clari?"	Directly addresses post-merger competitive uncertainty; Steve Cox is 6 months in and likely reassessing competitive strategy.
2	"With the AI/ML engineering roles you're hiring for, how are you equipping your sales team to articulate Clari's AI differentiation versus Salesforce Revenue Cloud's native AI?"	Ties hiring signals to GTM enablement gap; CPO Rohit Shrivastava owns product but sales needs competitive ammo.

#	QUESTION	WHY THIS LANDS
3	"G2 reviewers praise your forecasting but flag UI complexity — how does that come up when you're competing against Outreach's simpler sequencing interface?"	Uses their own customer sentiment against a named competitor; creates urgency around churn risk.
4	"Your Deloitte partnership targets enterprise 'Revenue Precision' — what competitive intelligence does that team have when they're positioning Clari against Salesforce's existing Deloitte relationships?"	References specific partnership and competitive overlap; relevant to Kevin Knieriem's Strategic GTM role.
5	"With Wingman, Groove, and Salesloft now under one roof, how are you helping reps explain the unified value prop when prospects ask 'why not just use Gong plus Outreach?'"	Directly addresses product overlap pain; the "four products, three overlapping capabilities" problem.
6	"Your 'Run Revenue with AI' messaging is strong — but how quickly can your team respond when a competitor like HubSpot launches a new AI feature and your prospects start asking about it?"	Tests competitive response time; creates opening for done-for-you intelligence.

Recommended Approach

- **Entry point:** Ben Fiechtner (CRO) or Kevin Knieriem (President, Strategic GTM) — both own competitive win rates and have public LinkedIn presence indicating outbound activity
- **Best channel:** LinkedIn (both are active posters) → warm intro or direct message referencing their public content
- **Timing:** Now — Steve Cox is 6 months into CEO tenure (strategic review window); post-merger competitive positioning is actively being defined; layoffs signal cost-consciousness that makes "done-for-you" efficiency appealing
- **Expected objections:** 1. "We have internal competitive intelligence resources" → Counter: "How quickly can they turn around a dossier on Outreach's latest pricing change? We deliver in 3–7 days." 2. "We're focused on integration right now" → Counter: "That's exactly when competitors attack — Gong and Outreach aren't waiting for you to finish integrating." 3. "Budget is tight post-layoffs" → Counter: "This replaces headcount you'd otherwise need to hire; it's competitive intelligence without the FTE."
- **Sample · Sales Intelligence proof points that resonate:**
 - *"Map competitors, prospects, and partners across the GTM data landscape"* — directly addresses their need to track Gong, Outreach, Salesforce, HubSpot
 - *"Battle cards and dossiers on public B2B vendors and buyers"* — enables sales team during post-merger repositioning
 - *"3–7 day delivery"* — speed matters when competitive landscape is shifting rapidly

Action Items

1. [] Draft LinkedIn connection request to Ben Fiechtner referencing his public post about outbound RevOps sales team — lead with Hook #3 (Salesforce/HubSpot moving upmarket)

2. [] Prepare one-page sample battle card: "Clari vs. Outreach — Post-Merger Positioning" using public sources to demonstrate deliverable quality
3. [] Monitor Clari careers page for Director of Sales Enablement hire — new hire in that role = warm lead for competitive intelligence tools
4. [] Set Google Alert for "Clari" + "Gong" + "Outreach" to capture competitive news for timely outreach hooks
5. [] Research Kevin Knieriem's October 2024 LinkedIn carousel for additional messaging language to mirror in outreach

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Deep Research

Here is the enriched competitive intelligence dossier for Clari, based on the provided research results:

Key Personnel

- **Andy Byrne** – CEO (Source: GetLatka)
- **Allison Carroll** – Chief Customer Officer (Appointed December 2024) (Source: Clari Newsroom)
- **Brian Benfer** – Chief Revenue Officer (Appointed May 2026 for the combined Clari + Salesloft entity) (Source: Clari Newsroom)
- **Rajesh Krishnaswami** – Chief Technology Officer (Appointed May 2026 for the combined Clari + Salesloft entity) (Source: Clari Newsroom)
- **Maya Connet** – Director of Sales (Source: Clari Blog)

Financial Profile

METRIC	VALUE	SOURCE
2024 Revenue (ARR)	\$158.5M	GetLatka
2023 Revenue	\$97.5M	GetLatka
2022 Revenue	\$82.9M	GetLatka
YoY Growth	~45% in 2025 (Decelerated from triple-digits in 2022-2023); 62.6% historically	InterviewPal, GetLatka
Total Funding	\$496M - \$510M	Contrary Research, Unify, GetLatka
Latest Funding Round	\$225M Series F (Led by Sapphire Ventures)	Salestools, GetLatka

METRIC	VALUE	SOURCE
Valuation	\$2.6 Billion (Set during Series F)	<i>Salestools, GetLatka</i>
Average ACV	\$105.7K	<i>GetLatka</i>

Competitive Intelligence

- **Competitors:** Gong, Outreach, Revenue Grid, Aviso AI, Revenue.io, Agentforce Sales (Salesforce), People.ai, Default, HubSpot, Sybill.ai, and Oliv.ai. *(Sources: Forecastio, Revenue.io, Salesforce, Default, Docket.io, Oliv.ai)*
- **Partnerships:** 1mind (Strategic partnership for revenue orchestration). *(Source: Unify)*
- **M&A / Consolidations:**
 - **Salesloft:** Clari and Salesloft announced a definitive merger agreement in August 2025 (estimated \$1.1B deal), creating a combined "Revenue AI powerhouse." *(Sources: Clari Newsroom, InterviewPal)*
 - **Groove:** Acquired by Clari, which expanded its EMEA customer base. *(Source: Contrary Research)*
 - **Wingman:** Acquired/integrated to become Clari Copilot (Conversation Intelligence). *(Source: Clari Case Studies)*
- **Known Clients:** Adobe, HPE, Cisco, Okta, Thermo Fisher Scientific, Zoom, F5 Networks, Databricks, Socrate, Affinity, Kantata, MarketMan, Corporate Filming, and Leapwork. *(Sources: Clari Press Releases, Clari Customer Stories)*

Additional Intel

- **Pricing & Implementation Costs:** Clari utilizes modular per-seat pricing (Forecast, Inspect, Copilot, and Groove are licensed separately). The full bundle costs between \$200 to \$310+ per user/month. Year-one implementation adds an additional \$15,000 to \$75,000. *(Source: Docket.io)*
- **Headcount & Layoffs:** The company has roughly 541 to 800+ employees depending on the reporting period. On February 12, 2026, Clari cut 76 jobs (approx. 8% of the combined workforce) to eliminate overlapping sales, marketing, and engineering roles following the Salesloft merger. *(Sources: Unify, InterviewPal, GetLatka)*
- **Product Architecture & Capabilities:**
 - Core modules include *Clari Forecast* (including industry-first Consumption Forecasting), *Clari Inspect*, *Clari Copilot* (Conversation Intelligence), and *RevDB* (a time-series data model).
 - In April 2026, Clari + Salesloft announced a Model Context Protocol (MCP) Server to open revenue data and connect insights directly to seller execution. *(Sources: Clari Newsroom, Clari Blog)*
- **Market Footprint & ROI Claims:** Clari serves over 1,500 enterprise customers across 170 countries, managing over \$4 to \$5 trillion in revenue. A commissioned Forrester TEI study claims a composite enterprise using Clari achieved a 398% ROI, \$96.2M in benefits over three years, and payback in under six months. *(Sources: Clari Press, Forrester TEI)*

- **Vulnerabilities (For Competitive Positioning):** Reviews indicate Clari is highly complex, requires heavy ongoing admin resources, and suffers from slow setup times. It is built primarily for large enterprises; lean GTM teams often experience "shelfware" and low adoption due to rigid SaaS architecture and manual roll-up processes. *(Sources: Default, Docket.io, Oliv.ai)*

Deep Research (Tavily Advanced)

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