



Epicbrief's Proof of Concept Process

Goals and Success Metrics



1. **Prove the quality of Epicbrief AI's extractions:** Demonstrate the accuracy and relevance of the data extracted by our AI.
2. **Showcase our team's support:** Provide a taste of how our team operates and supports customers.
3. **Reduce administrative workload:** Highlight the impact of our workflows in minimizing your team's day-to-day administrative tasks.
4. **Improve pipeline visibility:** Illustrate how our product enhances the visibility of your sales pipeline.



Key Stages of the POC



1. Set Up Meeting (45 minutes)

- a. Objective: Set up the initial system and integrate Epicbrief with your existing tools.
- b. Activities:
 - i. Connect to Gong and Salesforce.
 - ii. Initial configuration and setup of call extractions.

2. Check-In Meeting (30 minutes)

- a. Objective: Review prompts and extractions to ensure alignment with your needs.
- b. Activities:
 - i. Discuss initial findings from Epicbrief AI extractions.
 - ii. Adjust prompts and workflows as necessary.

3. Go/No-Go Session (30 minutes)


- a. Objective: Evaluate the results of the POC and decide on the next steps.
- b. Activities:
 - i. Review the impact and effectiveness of the POC.
 - ii. Make a go/no-go decision based on the outcomes.

Process overview

Throughout the POC, you will be assigned a dedicated Revenue Architect who will manage the process and implement the necessary prompts and workflows. Our goal is to deliver value to you while handling the majority of the workload, ensuring the POC is approachable and efficient.

You will have access to our admin panel, allowing you to review or change any configurations as needed. However, **our team will take the lead** in managing the process to ensure a seamless experience.

Steps Involved:

1. Assigning Solutions Architect: A dedicated Revenue Architect from Epicbrief will be assigned to oversee the POC.
 2. Initial Setup: Your Epicbrief Revenue Architect will guide you through the installation and handle the initial configuration.
 3. Ongoing Management: The Revenue Architect will design and manage the prompts and workflows for your initial setup, ensuring they deliver value.
 4. Review and Adjust: You will have the opportunity to review and adjust configurations as needed.
 5. Final Evaluation: At the end of the POC, a go/no-go decision will be made based on the outcomes.
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FAQ



Will the POC take too much of my time?

No, the POC is designed to be efficient, requiring only three short meetings over two weeks.

Will I need to distract my team during the POC?

No, the POC can run with minimal involvement from your team. Its fully automatic.

Do I need to connect Epicbrief to production environments?

Yes, but Epicbrief ensures data privacy and security in compliance with industry-standard certifications and practices.

Do I need to run this through infosec and procurement?

It is advisable to consult with your infosec and procurement teams, but our process is designed to be straightforward and compliant with standard security protocols. We're happy to setup agreements if needed for a POC to be put in place.

