

How to Test Breeze Intelligence

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Background

As you might know, Breeze Intelligence is in its Beta stage, and we continue enhancing its features and functionality. Since Breeze Intelligence is our first product with a usage-based billing system, we're taking a bit more time to figure out how to offer different access levels for users who aren't on paid subscriptions.

While we continue to develop, we're aware of the importance of testing and helping your customers see how well Breeze Intelligence fits their needs. That's why we've launched a Data Testing feature for all portals for free. This will allow you to check data coverage in both your own and your customers' portals. In the short term, this should give valuable insights into the benefits Breeze Intelligence can offer and make the evaluation process smoother.

FAQ

What is Data Testing?

Customers can test out the data in their CRM for free at any time. This allows customers to effectively trial Breeze Intelligence to understand what's in our data set for a given selection of their CRM companies or contacts, and whether Breeze will make sense for them to buy.

What does this not do?

We won't show the data values or preview any data, and there is no usage limit associated to this functionality. It's simply meant to select records in the CRM to test and see whether we have data or not.

Who will have access to Data Testing?

All customers will have access to contact and company records. This means that partners can also test both their own data and their customer's data within the customers' portal.

When will it be available?


It is available to all customers as of November 20.

What's the long-term solution?

We will re-evaluate in January after we have a few months of usage data to understand how we can support a different demo experience for partners.

Partner demo experience (existing customer)

1. Log into the client's portal
2. Open contacts or companies
3. Select a group of contacts or companies (up to 100 on the same page)
4. Click More → Enrichment coverage
5. See the results in the side panel
6. There's a CTA to purchase Breeze Intelligence there

 **Suggestion:** Try this on the customer's most important list (i.e. their 100 most recently acquired customers or 100 companies in their ideal customer profile).

Partner demo experience (net new customer)

It's unlikely that Breeze will be the first SKU someone buys. It's more likely a cross-sell/upsell opportunity for existing customers. However, if a partner wants to show Breeze Intelligence to a prospect that doesn't have an existing portal, they can hack it with these steps:

1. Create a free trial portal for the prospect
2. Import some of the prospect's contacts or customers
3. Repeat steps 3-6 above on the imported data