



7Rivers

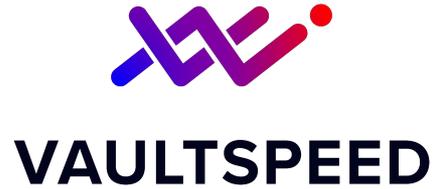
Snowflake Sales Kickoff FY26

About Us

7Rivers is a pioneering technology services company that helps customers harness the power of data and AI to deliver real business value for their companies. We do this by advancing our customers' data management practices through the use of modern cloud data warehouse technologies while leveraging the emergence of mainstream AI. Our business modernization frameworks and Data Native™ Model help to prioritize the way forward by focusing on a business-driven approach.

We partner with **Snowflake** and **AI** service providers to augment the modern enterprise.

Our Partners



Our Clients

Humana

AMERICAN FIDELITY
a different opinion

**COMPSOURCE
MUTUAL**
INSURANCE COMPANY®

hsabank
own your health®

VOYA
FINANCIAL™

S B P
SPECIALTY BUILDING PRODUCTS

omeda

TPI

JOHNSON'S NURSERY.

HGA

**Logic
Monitor**

ASSETMARK™

lendingtree®

OMRON

Elevator Pitch

7Rivers helps organizations navigate their data-rich environments to unlock digital innovation and unleash human potential. By transforming raw data into actionable insights powered by AI, we empower businesses to drive progress, foster innovation, and enhance decision-making at every level.

Built For Now

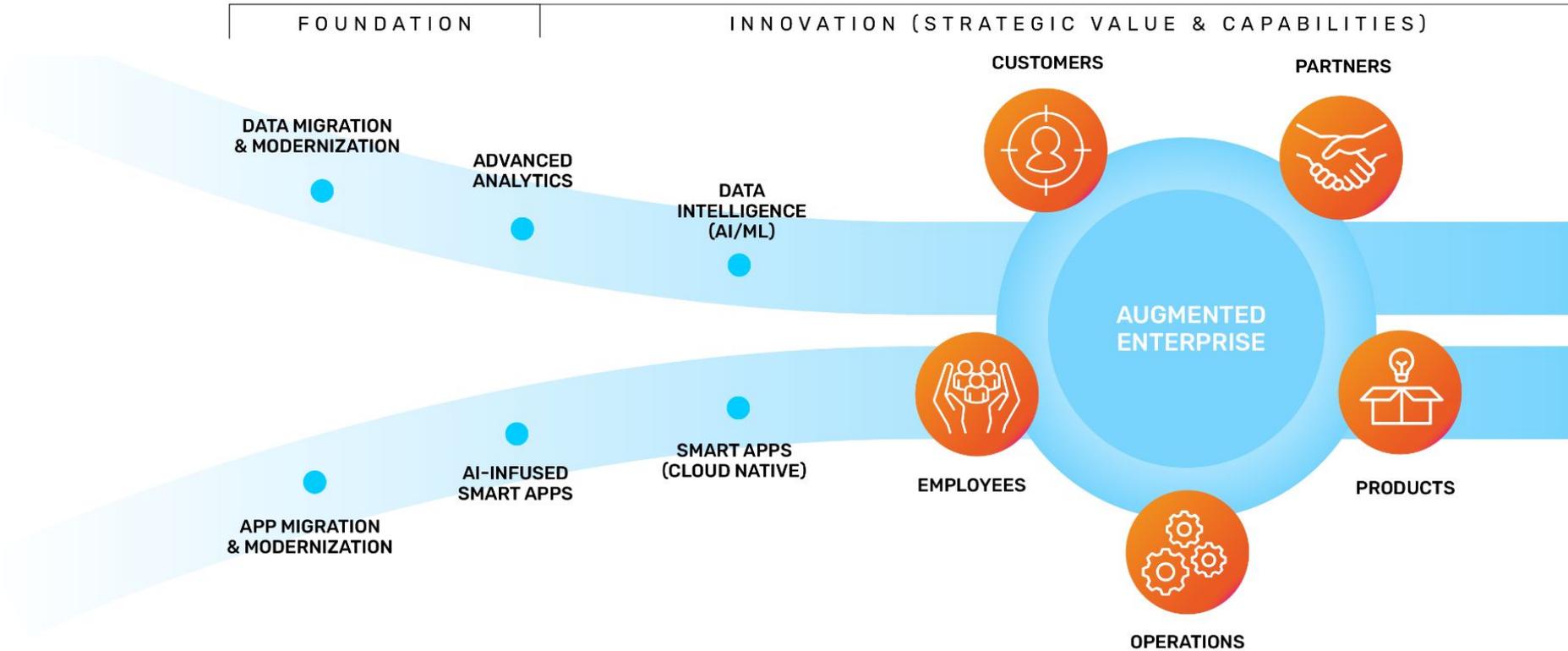
At 7Rivers, we believe data has immense potential and every organization should harness it. We are creating a future where businesses confidently utilize AI to unlock business value, drive innovation and growth, and we're committed to making that vision a reality.

As leaders in AI and data modernization, we empower organizations to leverage advanced technologies for smarter, faster, and more strategic decisions.

We equip businesses with the skills and tools to fully utilize their data. We guide our clients through the complexities of modern data ecosystems, delivering tailored AI solutions that reveal hidden value and optimize operations.



Unlocking the Augmented Enterprise



Data Native™ Model

There is a specific way you have to think about business architecture to begin creating the Augmented Enterprise. We call this the Data Native™ Model

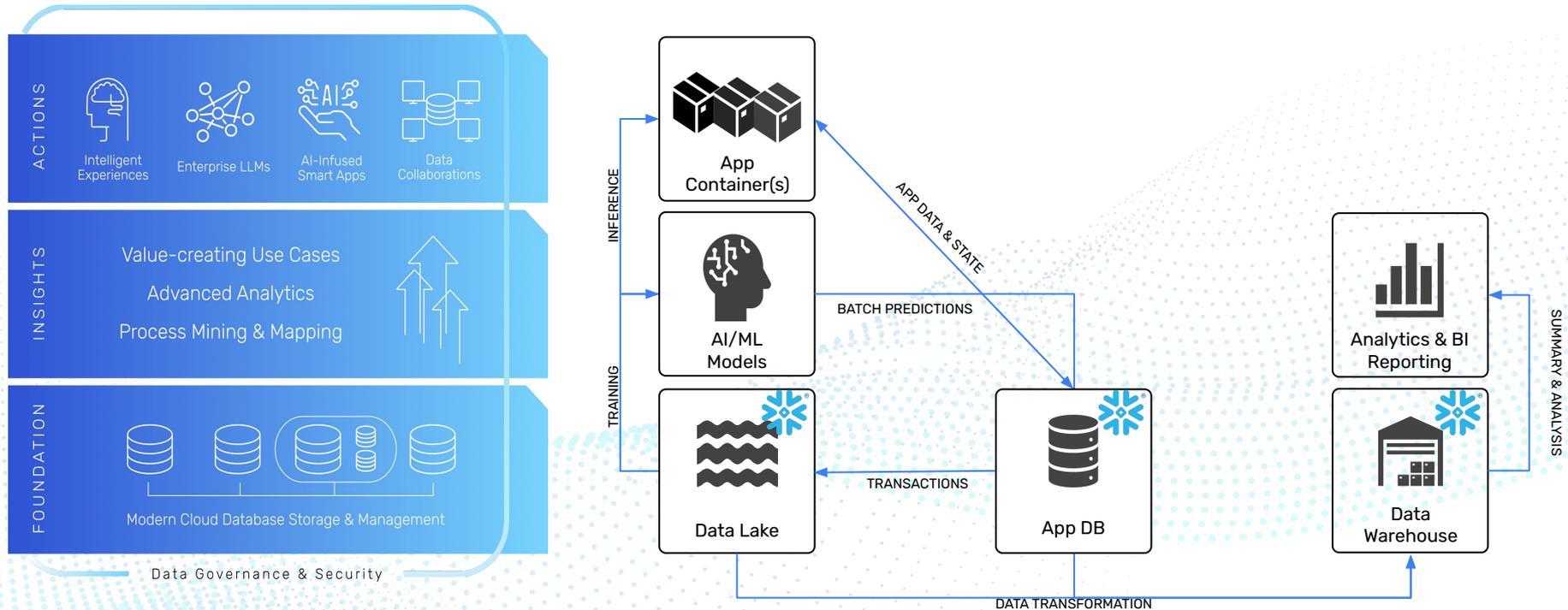
Actions are the programs that your business can move on right now to leverage data and AI to deliver business value and enable your journey towards an Augmented Enterprise.

Insights are “Business Insights” drawn from an understanding of your business processes, defining areas of impact for advanced analytics, with a focus on identifying High-value Use Cases.

Foundation means your “Data Foundation” including any necessary migration and modernization required to blueprint the Augmented Enterprise



Data Native™ Model & Reference Architecture on Snowflake



Accelerators



7Rivers: Secure

Automate routine financial processes and streamline workflows to handle transactions and interpret complex data in real-time.



7Rivers: Profiler

Quickly profile and extract metadata to set the stage for enterprise data platforms, Large Language models (LLMs) and GenAI applications.



7Rivers: Optimizer

Ensure efficient Snowflake credit usage while maintaining compliance—saving costs and maximizing value.



7Rivers: Compare

Enhance parallel testing to reduce delays and improve accuracy in your Snowflake workflows.



7Rivers: Prolgest

Simplify ingestion into your data platform with open-source ingestion, utilizing source metadata to assist in configuration and automation.

Introducing AI Agent Marcos

An Accelerator built on Snowflake designed to jump start an organization's GenAI capabilities

Consists of multiple components that can be independently utilized, portable to other cloud platforms, and leverages multiple models including open source. Including:

- OpenAI' GPT-4o
- Anthropic Claude Opus
- Google's Gemini Advanced
- Snowflake Arctic & cortex models

Augmented capabilities include:

- Sales research
- Identifies sales opportunities
- Dossier Generation
- Sales Account Training / Preparedness
- Sales Call Plan
- Proposal Generation
- Draft Contract Creation



The 7Rivers Core Business Spheres



Customers: Transform customer engagement by delivering hyper-personalized experiences, predictive insights, and enhanced support systems that drive higher satisfaction, retention, and revenue growth.

Partners: Strengthen business ecosystems by streamlining partner onboarding, enabling data-driven collaboration, and optimizing supply chains to maximize joint venture success and ROI.

Products: Accelerate product innovation and market success with advanced analytics, AI-driven personalization, and sustainable development insights, ensuring alignment with customer demands and competitive differentiation.

Operations: Elevate operational excellence with predictive maintenance, intelligent process automation, and real-time visibility tools, reducing downtime and driving cost efficiencies across the value chain.

Employees: Empower workforce productivity and innovation through AI-driven talent acquisition, personalized development plans, and automated performance management, aligning employee capabilities with strategic business goals.

Partner Capability Model

Vendors working with Channel Distribution Partners

Gaps in single software solutions, enabled with consolidated data and AI

Recruit & Onboard

Market & Incentivize

Sell

Commerce & Order Fulfillment

Channel Revenue

Manage & Service

Recruit and onboard any type of partner with verticalized templates

Incentivize partners with fiscal and non fiscal rewards; support to and thru partner marketing

Front office of the partner sales motion

Middle office for partner sales esp B2B Commerce ops

Manage and grow the partner network with rich analytics and service mgmt

Landing Page

Onboarding

Campaign Marketplace

Rebates

Lead Distribution

Product Catalog

Design Registration

Ship & Debit

Case Management

Scorecard

Application Intake

Continuous training

Audience Targeting

Loyalty

Opportunity Mgmt.

Configure, Price, Quote

Inventory Ledger

Price Protection

Knowledge

Reports & Dashboards

Verification / Credentialing

Gamification, Leaderboard

Asset Library

MDF and CO-OP

Account Management

Inventory Mgmt.

Stock Rotation

Change Order Collaboration

Feedback Loop

Account Hierarchy

Contracting / Agreements

Partner Search

To Partner Marketing

Referrals

Deal Registration

Order Management

Payment Mgmt.

B2B / EDI Integrations

Channel Programs

Account Planning

Distributed Marketing

CoSell w/ partners

Payments

Partner Quotes & Contracts

Delegated Admin

Appointment Scheduling

Marketplace

The Future of the channel is AI Enabled & Data Driven

Partner Ecosystem Predictive Insights

S

Intelligent Partner Lead Routing

Dynamic Partner Collaboration Networks

Autonomous Contract & Deal Mgmt.

Hyper-Personalized Partner Enablement

Adaptive Partner Tiering System

Unified Channel Risk Management Platform

Data Sharing Ecosystem

Predictive Channel Expansion



Customer Capability Model

Strong Data Science Candidate
AI, ML, Automation and GenAI high value candidates

Acquisition & Engagement

Onboarding & Activation

Customer Insights & Analytics

Retention & Loyalty

Support & Service

Advocacy & Feedback

Targeted, multi-channel campaigns to attract and engage customers.

Accelerate adoption with seamless onboarding and activation.

Actionable insights from data for better decisions.

Tailored programs to boost retention and loyalty.

Automated, personalized workflows for exceptional support.

Strengthen relationships through advocacy and feedback.

Customer Segmentation

Onboarding Workflows

Customer 360

NPS Tracking

Case Mgmt & Self Service portals

Referral Incentive Programs

Omni Channel Campaign Mgmt.

In-App Guidance

Propensity Modeling

Loyalty Program Mgmt.

Field Service Scheduling

Product Co-Creation Initiatives

Lead Scoring

Milestone Tracking

Sentiment Analysis

Renewal Mgmt.

Sentiment Based Escalation

Feedback Loop Dashboards

Real-Time Engagement

Onboarding Feedback Surveys

CLV Analysis

Incentive Optimization

AI Powered Chatbots

Feedback Integration into CX Design

Event Marketing

Onboarding Gamification

Churn Monitoring

Customer Advocacy Networks

Support Workflow Automation

Customer Journey Mapping

Onboarding Documentation Mgmt.

Voice of the Customer

Upsell through Retention

Cost to Serve Optimization

Social Listening

Proactive Assist - AI

Predictive Demand Forecasting

Customer Health Scoring

Multi-Channel Support

Cross-Sell & Upsell Insights

Insurance: Thought Provokers & Prototype Ideas

Automated Claims Triage System

- **Benefit:** Reduces claims processing time and operational costs.
- **Description:** An AI-powered system that categorizes and prioritizes incoming claims based on severity, urgency, and complexity. It allows adjusters to focus on high-priority cases and minimizes wait times for clients.
- **Key Technologies:** Snowflake, Natural Language Processing (NLP) for text analysis on claim descriptions, predictive triage models.

Risk Exposure Dashboard with Predictive Alerts

- **Benefit:** Enhances risk visibility and allows proactive risk mitigation, reducing financial impact.
- **Description:** A dashboard powered by AI that continuously monitors risk exposure across different client segments, geographic regions, and event types. Predictive alerts notify risk managers when risk exposure reaches a predefined threshold, enabling immediate action.
- **Key Technologies:** Snowflake, data visualization tools (Tableau, Power BI), AI-based risk prediction.

Weather-Triggered Claims Prediction and Alert System

- **Benefit:** Prepares resources for spike in claims, leading to improved customer satisfaction and operational efficiency.
- **Description:** Using Snowflake's data-sharing capabilities, integrate real-time weather data with historical claims data to predict areas likely to experience higher claims. This enables the deployment of resources proactively.
- **Key Technologies:** Snowflake, real-time data integration, predictive analytics, weather data integration.

Sales & Marketing Enablement

Business Function & Scenario Overview

Outlined below are six (6) Business function and scenarios that are highly relevant to organizations and how we have defined them. Further details are provided in subsequent content, inclusive of: Business Drivers, Key Data Sets, Audiences/User, Business Benefits and High Value Solution approaches anchored to Snowflake.

Data Migration & Modernization

Accelerate legacy migrations to Snowflake with 7Rivers' pre-built accelerators, ensuring scalability, efficiency, and faster time-to-value

Data Platforms & Engineering

Modernize data infrastructures with Snowflake's cloud-native scalability, combined with 7Rivers' engineering expertise for high-performance architectures

Data Sharing & Collaboration

Foster secure collaboration with Snowflake's seamless data-sharing ecosystems, supported by 7Rivers' tailored frameworks for real-time insights

Customer Data Platforms (CDP)

Unify and activate customer data with Snowflake's composable CDP architecture, amplified by 7Rivers' scalable, insight-driven solutions

Sales & Marketing Enablement

Empower teams with Snowflake's advanced analytics and AI tools, enabling precision campaigns, demand forecasting, and sales optimization, guided by 7Rivers' expertise

AI/ML and GenAI Applications

Leverage Snowflake's Cortex and GenAI to automate workflows, deliver intelligent insights, and revolutionize processes with 7Rivers' data-driven accelerators

Sales & Marketing Enablement

Industries / Verticals with High Relevance: Software & High Tech, Financial Services, CPG

Business Drivers

Maximize Customer Acquisition and Conversion: Leverage AI and predictive analytics to attract and convert high-value customers.

Streamline Sales Cycles: Equip sales teams with actionable insights and next-best-action recommendations.

Optimize Marketing Spend Efficiency: Use AI to allocate resources effectively across channels and campaigns.

Enhance Demand Planning Accuracy: Align sales and marketing strategies with improved forecast precision.

Improve Customer Engagement: Drive meaningful interactions by tailoring campaigns to customer preferences.

Business Benefits / Metrics

Revenue Growth and Business Expansion

AI-powered insights enable marketing teams to identify and engage high-value audiences, unlocking new revenue streams.

Cost Reduction and Operational Efficiency

Automation of campaign processes and spend optimization improves efficiency and reduces wasted resources.

Faster Decision-Making

Real-time analytics and forecasting tools provide sales and marketing teams with timely, actionable insights.

Customer Satisfaction and Retention

Enhanced targeting and tailored campaigns strengthen customer relationships and increase loyalty.

METRICS

- ❑ Increase campaign ROI with AI-optimized spend allocation (+20-30% improvement in return on investment).
- ❑ Accelerate lead conversion rates using AI-based recommendations (+15-20% faster conversion time).
- ❑ Improve pipeline visibility with predictive demand forecasting (+25% accuracy in forecasts).
- ❑ Enhance segmentation precision, driving higher engagement rates (+15-25% increase in response rates).
- ❑ Reduce marketing inefficiency by identifying underperforming channels (-20-25% decrease in wasted spend).

Relevant Data Sets

Campaign performance data (CRM, marketing platforms).

Historical sales pipeline data (CRM, sales systems).

Customer segmentation and engagement metrics (web/app analytics).

External market trend and demographic data (Data Marketplace).

Data Native™ Solutions: Sales & Marketing Enablement

AI-Driven Campaign Optimization Tool

Implement a Snowflake-powered tool for AI-driven campaign optimization, using historical performance data to identify high-value segments and allocate marketing spend efficiently.

- ❑ **Business Impact:** Improves campaign ROI by enhancing precision in targeting and reducing wasted spend.
- ❑ **Key Data Sources:** Historical campaign performance data, customer segmentation models, and budget allocation metrics.
- ❑ **User Experience:** Integrated with existing marketing platforms, providing marketers with actionable recommendations for real-time campaign adjustments.

Predictive Sales Pipeline Accelerator

Build a Snowflake-based predictive sales pipeline accelerator that uses AI to forecast deal probabilities, recommend next-best actions, and prioritize high-value opportunities.

- ❑ **Business Impact:** Accelerates deal closure rates, improves forecast accuracy, and enhances sales team efficiency.
- ❑ **Key Data Sources:** Historical sales data, CRM pipeline metrics, and external market trends from Snowflake Data Marketplace.
- ❑ **User Experience:** Embedded into CRM platforms, providing sales teams with AI-driven insights directly within their workflows.

Integrated Demand Planning Platform

Develop an integrated demand planning platform on Snowflake to align marketing and sales strategies. Leverage AI for predictive demand forecasts, incorporating external data and real-time analytics.

- ❑ **Business Impact:** Aligns sales and marketing teams with accurate demand forecasts, reduces over- or under-spending, and improves strategic planning.
- ❑ **Key Data Sources:** CRM data, historical sales trends, and external demand drivers from Snowflake Data Marketplace.
- ❑ **User Experience:** Fully integrated with enterprise planning tools, offering real-time visualizations and collaborative forecasting capabilities for marketing and sales teams.

Predictive Sales Pipeline Accelerator

Build a Snowflake-powered predictive sales pipeline accelerator that uses AI to forecast deal probabilities, recommend next-best actions, and prioritize high-value opportunities for sales and marketing teams.

Ingestion & Integration

- Ingest CRM and sales pipeline data into Snowflake using connectors like Fivetran or native integrations.
- Configure Snowpipe for real-time ingestion of new opportunities and deal updates from CRM systems.
- Set up Streams and Tasks to automate data transformations, enabling predictive model readiness.

AI-Powered Predictions

- Train AI models using Snowpark to calculate deal probabilities and predict closing timelines based on historical win/loss data.
- Use Cortex to deliver natural language insights and generate AI-driven next-best-action recommendations for sales reps.
- Store prediction results in Snowflake for easy access by downstream tools like CRM and analytics platforms.

Analytics & Insights Delivery

- Build Materialized Views to aggregate and surface key sales metrics such as deal progression rates and team performance.
- Integrate with BI tools like Tableau or Looker to provide visual dashboards for sales managers.
- Configure dynamic alerts via Snowflake Notifications for high-priority deals or underperforming opportunities.

Governance & Security

- Define role-based access controls (RBAC) to ensure sales team members can only view data relevant to their regions or roles.
- Use Dynamic Data Masking to protect sensitive customer information like financial details during analytics sharing.
- Enable Account Usage Views for monitoring data access and usage across the solution.

Platform Capabilities Used

CORE

- **Snowpipe:** For real-time ingestion of CRM and sales data to ensure up-to-date insights.
- **Streams and Tasks:** To automate ELT workflows and keep data transformations synchronized with changes.
- **Snowpark:** For AI/ML model development and execution directly within Snowflake.
- **Materialized Views:** To optimize reporting and analytics by precomputing frequently accessed metrics.
- **Multi-cluster warehouses:** To ensure scalability and performance during periods of high demand.

EXTENDED

- **Dynamic Data Masking:** Useful for securing sensitive customer details, especially in shared reporting environments.
- **Query Profiling and Resource Monitors:** Critical for cost optimization and performance tracking but optional in less resource-intensive scenarios.

Predictive Sales Pipeline Accelerator

Build a Snowflake-powered predictive sales pipeline accelerator that uses AI to forecast deal probabilities, recommend next-best actions, and prioritize high-value opportunities for sales and marketing teams.

Aligned to the 7Rivers Way Delivery Approach

01. **Visioning and Strategy Development:** Conduct workshops with sales and marketing teams to define prediction use cases and measurable outcomes (e.g., improved close rates).
02. **Accelerator-Driven Execution:** Leverage pre-built 7Rivers accelerators for CRM data integration and AI model deployment.
03. **Data Native Model Alignment:** Prioritize ingestion of high-value CRM data, aligning pipeline metrics with Snowflake's Data Native Model.
04. **Agile Iterative Delivery:** Deliver in sprints:
 - a. Sprint 1: Set up data ingestion and basic reporting dashboards.
 - b. Sprint 2: Develop and deploy initial AI models for deal predictions.
 - c. Sprint 3: Refine insights and integrate with CRM workflows.
05. **User Experience-Centric Design:** Collaborate with sales teams to design intuitive dashboards with actionable insights directly within their tools.
06. **Performance and Scalability Focus:** Optimize AI workflows and Snowflake compute resources for low-latency predictions.
07. **Outcome Measurement:** Define and track KPIs like close rate improvement, lead conversion speed, and forecast accuracy.