

Sentinel Pulse

Instantly identify
upsell, cross-sell, and
churn risks without
leaving your CRM

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Building a future we can all trust

Sentinel Pulse

Sentinel Pulse shows account-level product engagement insights in your CRM so that sales teams can act on high-intent revenue opportunities.

Problem

Salespeople want to know whether existing customers are using the products they sold. But companies often lack a way to capture customer usage data. And even when they can capture it, the data is typically tied to individual users and locked away in tools or spreadsheets that sales teams don't access.

As a result, sales teams are often caught off guard. They miss chances to improve retention and grow revenue. Sometimes, they don't realize a customer isn't using the software until a tough renewal is already underway. Other times they miss the opportunity to upsell a customer who quickly deploys all their licenses. Without clear usage data, sales reps are unable to spot signs of churn risk or recognize moments of expansion potential.

Solution

Sentinel Pulse collects, analyzes, and associates product engagement data with accounts, providing your sales team with a comprehensive view of how customers are using their purchased products. With instant access to actionable insights, sales reps can quickly identify which accounts are fully engaged and ready for upsell or cross-sell conversations, and which accounts may be at risk of churning.

Because Pulse sits directly in your CRM, it makes it easier than ever for sales to assess overall account health and engage in proactive, data-based conversations that **drive recurring revenue growth.**

Key Outcomes

Accelerate Upsell & Cross-Sell

Product usage metrics—like account-level product engagement data, entitlement consumption, and license activation trends—give you a clear view of how engaged customers are with purchased products. With this insight at their fingertips, sales teams can quickly identify whitespace where cross-sell could drive more value for both the customer and the business.

Move from Guessing to Knowing to Drive Revenue and Retention

20-40%

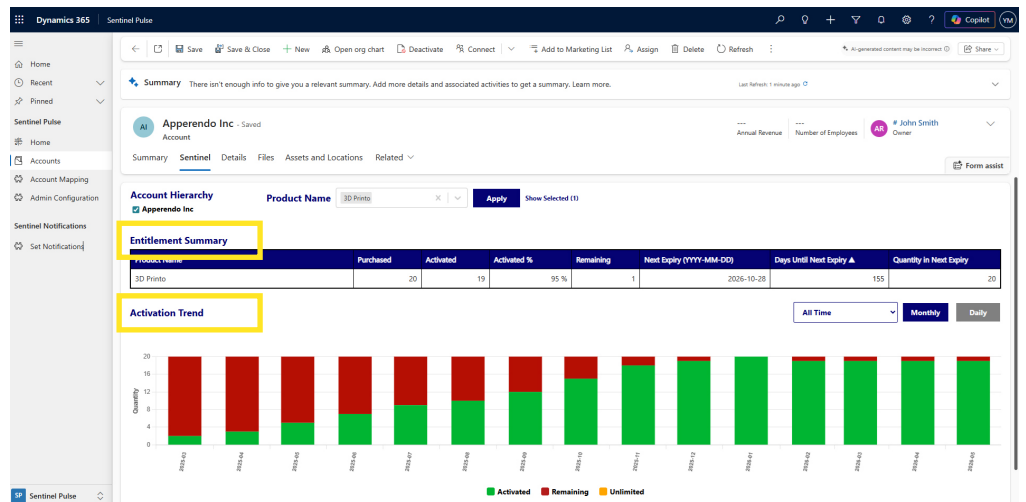
Increase CLV through usage-based upselling and cross-selling (Salesgenie)

15%

Higher retention after proactive engagement leveraging usage intelligence

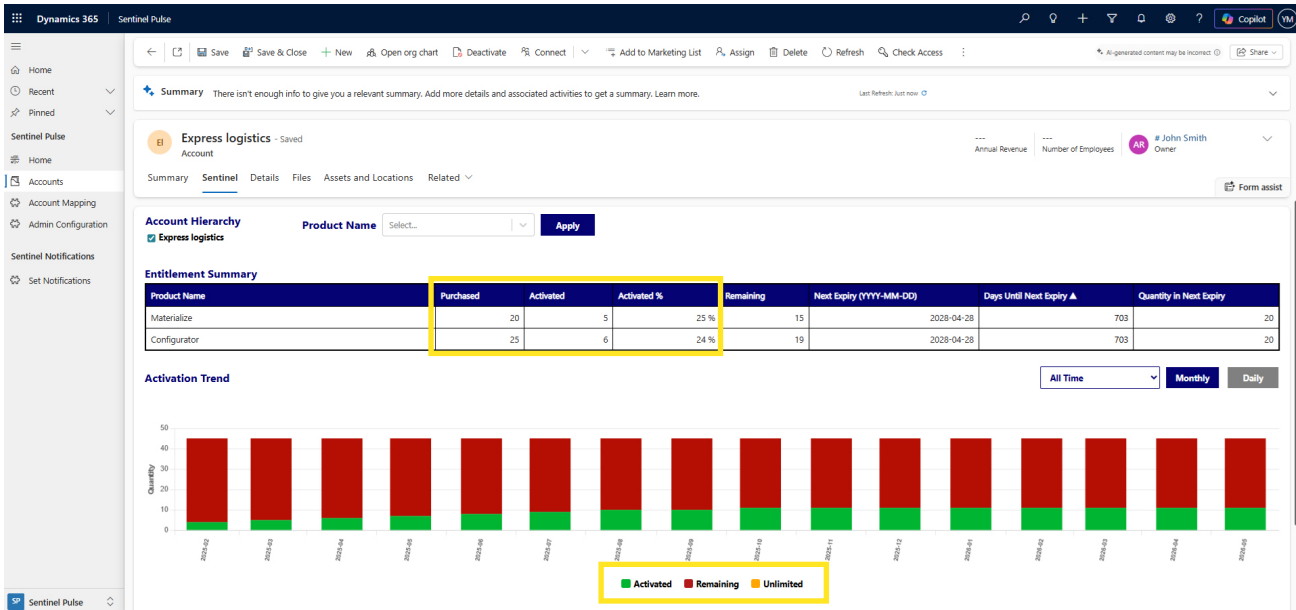
15x

Improvement in PQL win rate (Amplitude)



Prevent Churn

When accounts are not active and engaged, there's a high risk of churn. The Entitlement Summary dashboard shows what products have been activated, while the Activation Trend dashboard tracks engagement over time. Rather than relying on teams to manually monitor these trends, Pulse proactively notifies your reps when engagement is low directly in the CRM. This ensures sales teams can take action before an account is at risk of churning.



Spot Priority Opportunities

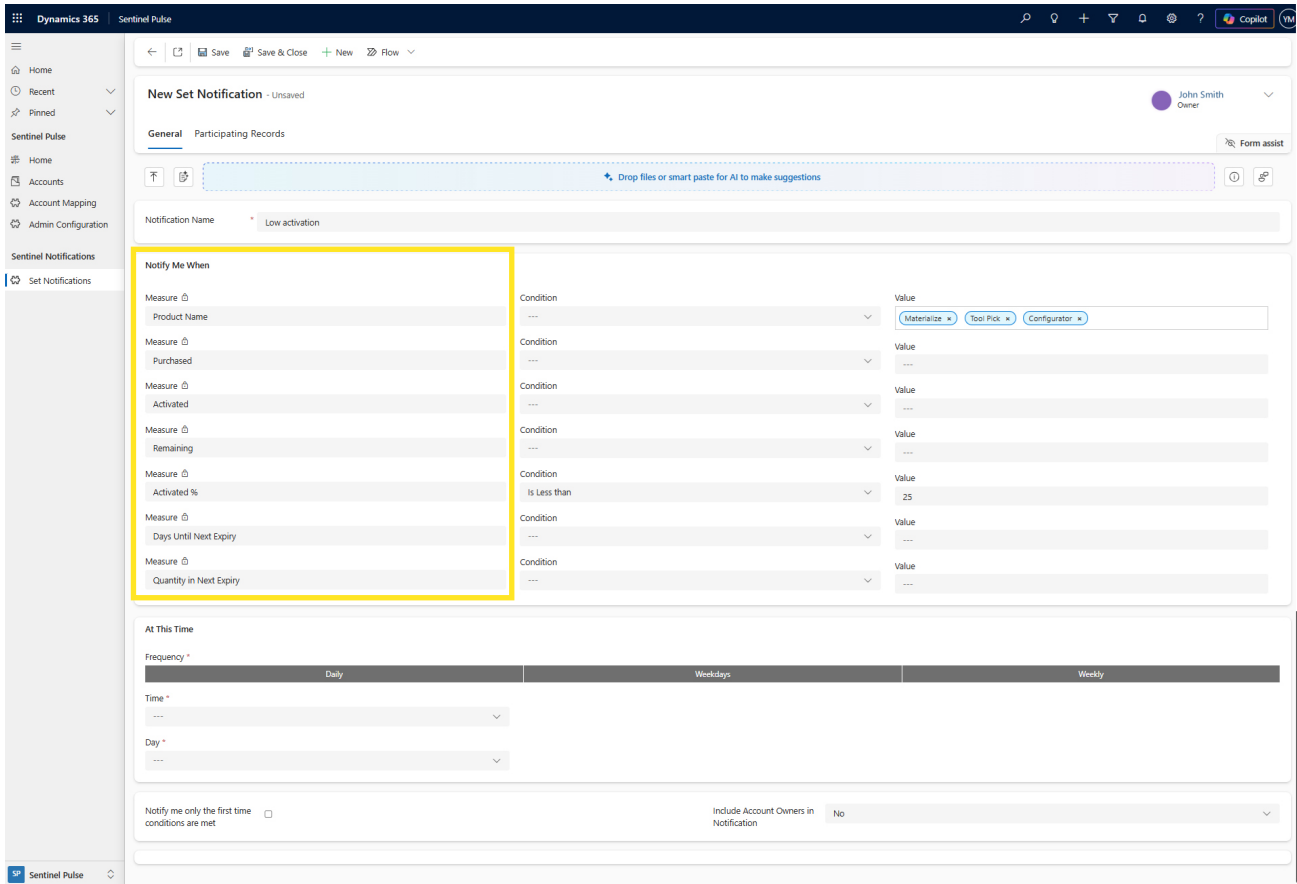
It's easier to prioritize opportunities when you have visibility into customer engagement, especially when you're managing many accounts. Sentinel Pulse takes engagement data that's typically scattered in various tools and presents it directly in your CRM. The easy-to-digest account engagement summaries and graphs for both flat and hierarchical accounts make it very clear which accounts need attention and when.

The screenshot displays the Dynamics 365 Sentinel Pulse interface showing a list of 'Product Engagement' opportunities. The table is highlighted with a yellow box, showing the following data:

Account Name	Product Name	Purchased	Activated	Activated %	Remaining	Next Expiry	Days Until Next Expiry	Quantity in Next Expiry
Apperendo Inc	Configurator	18	7	39	11	6/12/2026	20	18
Edge Comm	AutoChat	10	2	20	8	6/28/2026	36	10
GenePoint	3D Printo	30	10	33	20	6/28/2026	36	30
Apperendo Inc	Tool Pick	20	18	90	2	6/28/2026	36	20
GenePoint	Tool Pick	20	10	50	10	7/9/2026	47	20
SpaceZ	Training Credits	80	60	75	20	8/12/2026	81	80
SpaceZ	PS - Development Serv...	1,000	750	75	250	8/12/2026	81	1,000
SpaceZ	3D Printo	20	20	100	0	8/12/2026	81	10
SpaceZ	AutoChat	20	18	90	2	8/12/2026	81	20
Wunderme corp	PS - Development Serv...	1,000	750	75	250	9/28/2026	128	1,000
Wunderme corp	Software Maintenance	1	1	100	0	9/28/2026	128	1
Wunderme corp	Training Credits	50	48	96	2	9/28/2026	128	2
Wunderme corp	3D Printo	20	20	100	0	9/28/2026	128	10
Edge Comm	3D Printo	20	20	100	0	9/28/2026	128	10
Wunderme corp	PS - Architecture Servi...	200	200	100	0	9/28/2026	128	200
Wunderme corp	PS - Consulting Services	100	100	100	0	9/28/2026	128	100

Stay One Step Ahead with Custom Alerts

Account managers can set custom alerts to notify them to take specific action. First, they choose from key conditions, such as contract expiration date, activation percentage, and more. Then, they set the threshold for a notification. Pulse will automatically send an alert when it's time to act. Notifications keep teams ahead of the curve, so they can proactively drive revenue growth and reduce churn.



Next Steps

Are you ready to empower your sales team with insights that will directly help them upsell, cross-sell, and reduce churn? Contact us, or click to start a guided tour of Sentinel Pulse today.

[Take a Product Tour](#)

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