

 Outreach Presents

# UNLEASH

2026

June 1-3

Scottsdale, AZ





# NITHYA LAKSHMANAN

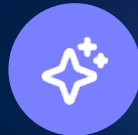
Chief Product Officer

 Outreach



# Future of Selling:

From *doing work* **TO** Orchestrating work



**Agents**  
as Teammates



**Conversations**  
Not Clicks

# Agentic AI Platform for Revenue Teams



## REVENUE WORKFLOWS

 Prospect & Manage Accounts

 Retain & Expand

 Manage Deals

 Coach Teams

 Forecast & Plan

## AGENTS

 Outreach OMNI

 Outreach Agents

 3rd Party Agents

## INTERFACES



## AGENT EXECUTION

Agent Studio

Tools

Skills

Evals

MCP

Models



## REVENUE CONTEXT

AI Ready APIs

Semantic Search

Context Graph

Memory

## REVENUE DATA

Emails, Calls, Meetings

CRM

1st Party: Product Usage, Customer Insights

3rd Party: Intent Signals, Accounts & Contacts

Public Data: Market & Buying Signals

Knowledge



# Agents for **Sales Leaders**



DELIVER REVENUE GROWTH WITH FEWER RESOURCES



## Forecast With Confidence

- Automated updates improve deal accuracy
- Alerts and health scores flag deal risks
- Validate forecasts with AI projections

Deal Agent

AI Projected Finish

Deal Alerts

Pipeline Summary

**Forecast rollup**

Forecast: New Business | Rollup: Chief Revenue Officer | Sales period: This quarter | Currency: USD

Forecast Call > **\$9,100,000**  
\$8,400,000 rollup (110% of quota)

AI Projection > **\$3,286,768**  
-\$90,399 today

Worst Case > **\$5,732,701**  
\$5,832,701 rollup (69% of quota)

Rollup | Opportunities | Trends

Name	Last submission	Forecast Call
Chief Revenue Officer / Rev Ops	5/19/2026 - 2:34 PM 11 days ago	\$9,100,000 110% of quota
RVP, Sales - NAM - East	3/16/2026 - 7:32 AM 2 months ago	\$1,350,000 54% of quota
RVP, Sales - NAM - Emerging	3/16/2026 - 7:30 AM 2 months ago	\$1,450,000 53% of quota
RVP, Sales - NAM - Strategic	3/16/2026 - 7:27 AM 2 months ago	\$2,500,000 250% of quota
RVP, Sales - NAM - West	3/16/2026 - 7:26 AM 2 months ago	\$3,100,000 124% of quota

**New Business**  
Chief Revenue Officer / Rev Ops

Metrics | AI projection

**\$3,286,768**  
AI projection

AI projection

Won = \$3,252,292  
Remaining Weighted Pipeline = \$34,476

**Weighted pipeline calculation**

Forecast Category	Close deals	Win rate	Weighted value
Pipeline	\$34.5K	0.83%	\$4.14M
Commit	\$0	0%	\$704K
Best Case	\$0	0%	\$5.78M

# Agents for **Sales Leaders**



DELIVER REVENUE GROWTH WITH FEWER RESOURCES



## Coach At Scale

- Live coaching in the meeting
- Automated scoring of rep skills
- Account level visibility on how each rep is pitching and handling objections

Smart Kaia Coach

Research Agent

Live Content Cards

Live Listen

**Kaia**

Recordings Playlists Coach cards Coach card reports Coaching metrics Topics report

**Coach cards** +

- AE discovery call
- AE demo
- PR Coaching - Follow U...
- CSM: kickoff call
- General onboarding

**AE discovery call**

For help and best practices, view our getting started guide.

Auto-scoring  
Automatically score the host when a meeting matches specific filter

**Questions**

- What is your overall score for this call?  
☆☆☆☆
- AE asked impactful discovery questions  
 Yes  No
- How prepared is AE with a summary & clear agenda based on buyer use cases & workflows?  
☆☆☆☆
- How well do we understand the role of the person we are talking to?  
☆☆☆☆
- To what extent did the AE align the solution to the customer needs?  
☆☆☆☆

**Auto-score settings**

Configure how meetings are automatically scored and who can view the results. Learn more

**Overall score weighting**

Define how questions impact the overall coaching score.

Custom

Equal

Custom

- Question 1 — Rating  
AE with a 'What we heard' summary & clear agenda based on Buyer use cases & workflows? 20 %
- Question 2 — Single Choice  
How prepared is AE with a 'What we heard' summary & clear agenda based on Buyer use cases & workflows? 12 %
- Question 3 — Rating  
AE asked impactful discovery questions to continue qualifying Buyer. 31 %

Did the speaker effectively lead the meeting and define an agenda

- Yes, clearly defined
- Somewhat defined
- No clear agreement
- Not applicable

### Feedback

The speaker mentions the purpose of the meeting and actions to test the scored by and scored four filters but does not provide a clear, structured agenda or direction beyond testing and follow-up. The agenda is somewhat defined, but not clearly.

# Agents for **Sales Leaders**



DELIVER REVENUE GROWTH WITH FEWER RESOURCES

Coach cards report   Coaching metrics   Topics report   AI topics explorer

🚀 **Acme SnapStats came up in 200 of 1,000 deals (20%), with those deals closing at a 71% win rate.**

300 meetings of 2,000 (15%)

**How does this show up in conversations?**

When Acme SnapStats is discussed, the following patterns are most commonly observed across conversations:

**What are buyers trying to evaluate or understand about this product?** ^

Buyers evaluate Acme SnapStats based on its ability to deliver actionable insights and improve decision-making efficiency — conversations frequently include questions about how accurately the product surfaces trends, identifies opportunities, and how much time it saves analysts by reducing manual data processing and reporting.

**Sources** ^

📄 Geometric Corp. / Acme Co. Sync	Mar 14, 2026
📄 Makeit Co. / Acme Co. Demo	Mar 24, 2026

**What concerns or objections are raised when this product is discussed?** ^

Buyers express concerns about the reliability and accuracy of insights generated by Acme SnapStats, particularly when decisions are driven by automated analysis. Questions often arise around data freshness, transparency of underlying models, and whether teams can



## Scale What Wins

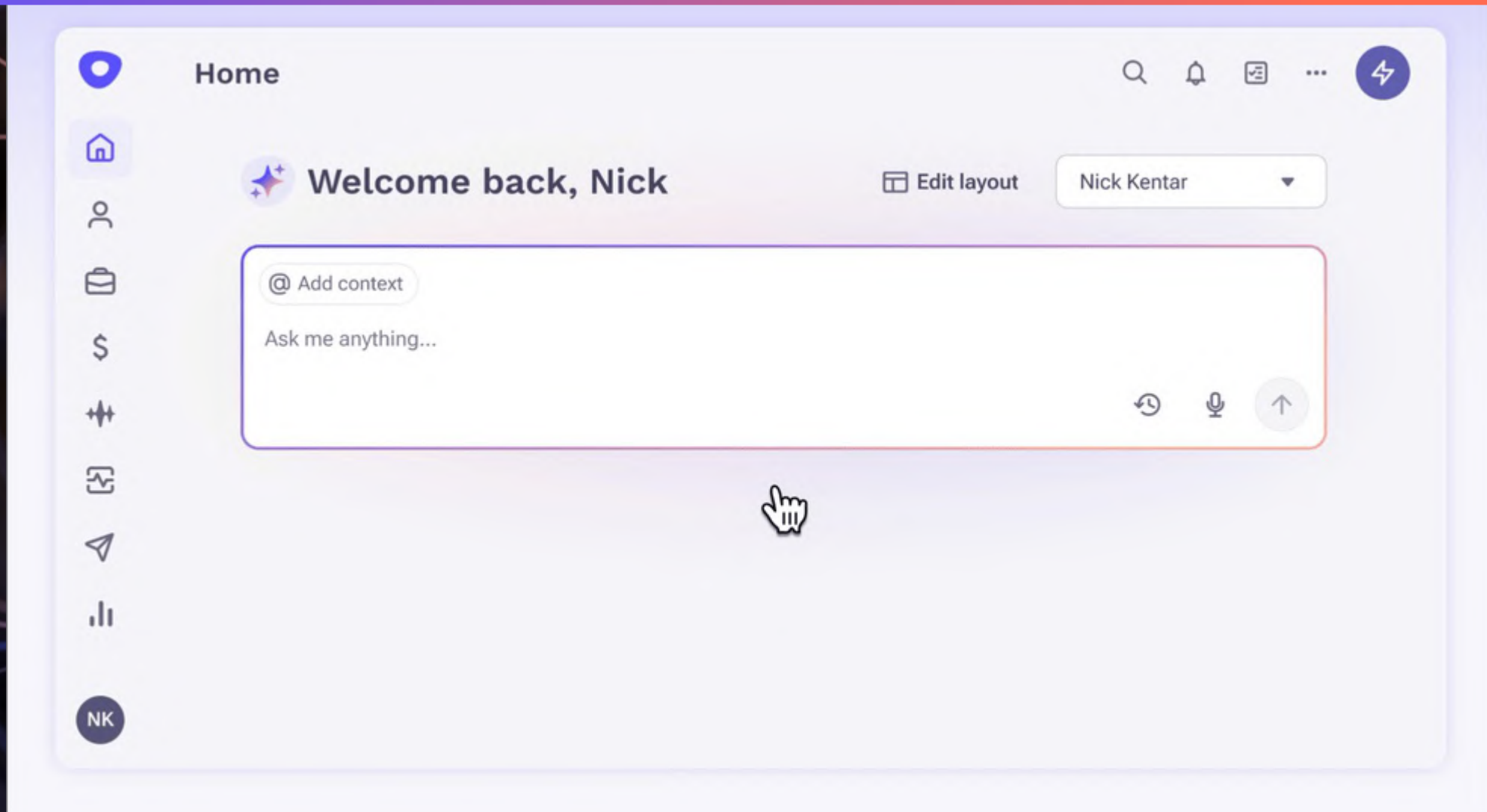
- Always-on insights, from conversations across accounts and deals
- Spot competitor and product trends
- Understand what drives deal wins

AI Topic Tracker

AI Topic Explorer

AI Win/Loss Outcomes

# OUTREACH OMNI : Conversational Agent for Any Revenue Workflow



# Agents for **Sales Leaders**



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## Forecast With Confidence

Deal Agent

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Pipeline Summary



## Coach At Scale

Smart Kaia Coach

Research Agent

Live Content Cards

Live Listen



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AI Topic Tracker

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**OUTREACH OMNI**: Conversational Agent for Any Revenue Workflow

# Agents for **Sellers**



IMPROVE PRODUCTIVITY, DEAL VELOCITY, AND WIN RATES



## Build Pipeline

- Automated account and prospect research
- Personalized content for emails, LinkedIn, call scripts, voicemails
- Automated plays - Outbound SDR, Inbound Leads, Winback, Closed Lost, Expansion

Revenue Agent

Research Agent

Personalization Agent

Sequential Dials

The screenshot displays an email outreach sequence for Alena Kenter, VP of Sales at Geometric Corporation. The email is personalized and includes several key elements:

- Header:** Alena Kenter, VP of Sales · Geometric corporation. Status: Qualified.
- Subject:** Driving AI Success at Geometric Corporation
- Salutation:** Hi Alena,
- Personalization:** I saw you recently joined Geometric Corporation as a VP of Sales - Congratulations! It's an exciting time in AI-
- Identified challenge:** Sales leaders often focus on helping their teams reduce repetitive tasks and improving productivity.
- Value proposition:** We've helped AcmeCorp automate account research and personalize outreach at scale, increasing qualified leads by 25% in 3 months, while getting the team to focus more on human connections and closing deals.
- Call to action:** Let's connect this week.

Key annotations in the screenshot include:

- Recent job change:** Points to the personalized salutation.
- Identified challenge:** Points to the sentence about repetitive tasks.
- Our value proposition:** Points to the paragraph about AcmeCorp's success.

# Agents for **Sellers**



IMPROVE PRODUCTIVITY, DEAL VELOCITY, AND WIN RATES



## Close Deals

- Automated meeting prep
- Automated follow-ups and updates: summaries, deal fields and next steps
- Alerts and actions to progress deals

Meeting Prep Agent

Deal Alerts & Health Scores

Meeting Summaries

Deal Agent

The screenshot displays a user interface for managing meetings. At the top, it says "Welcome back, Nick" with an "Edit la" link. Below is a section for "Upcoming meetings" for "This week".

Date	Meeting Name	Time	Status	Actions
Sep 17	Geometric <-> Outreach	3:00 - 4:00 PM	3/4 accepted	Prep, Join
Sep 18	Lumix <-> Outreach	9:00 - 10:00 AM		
Sep 18	Driftu / Outreach Discovery Call	2:00 - 3:00 PM	3/3 accepted	

A detailed view of the "Geometric <-> Outreach" meeting is shown below. It includes a "Meeting brief" section with the following content:

**Meeting context** ⓘ Updated on Sep 16, 5:30 PM by Nick Kentar ▾

**Past conversations summary** ^

**Key points from previous discussions**

- During a meeting with Alex Turner, the Outreach team coordinated with Sarah Green, the Global Sales Engagement Director, regarding a trial of Outreach Agents. They discussed the potential use case for the pilot, success metrics, and pricing expectations. Jamie showcased the Research Agent.
- The agreed pilot scope includes 5 to 10 BDRs over a period of 4 to 5 weeks, with 2 weeks dedicated to configuration.

Sources 5 ▾

# Agents for **Sellers**



IMPROVE PRODUCTIVITY, DEAL VELOCITY, AND WIN RATES

**Conversation Summary** ✨

(AI) Executive Summary

Account Health and Satisfaction

- AKG Healthcare Group is actively engaged, with steady communication and responsiveness to outreach. Recent emails and meetings indicate ongoing interest in solutions that streamline internal communications and enhance patient engagement.
- Engagement metrics show both outbound and inbound activity, including calls, emails, and scheduled meetings. The account appears healthy with consistent touchpoints and positive responses.
- No explicit concerns or dissatisfaction have been expressed by AKG leadership.

Areas of Risk

- There are no direct churn signals or negative feedback documented. However, the lack of visibility into deal progression and potential opportunities falling through the cracks was noted as a challenge. This may represent a risk if not proactively managed.
- Potential blockers include limited visibility for leadership to influence deals before risk arises, as well as the need to ensure all stakeholders are engaged and informed.

Expansion Opportunities

- Outreach solutions can be further adopted to reduce manual administrative tasks, allowing sales reps to focus more on high-value patient and partner engagement.
- Introduction of Research Agent and Revenue Agent could drive broader adoption, uncovering insights and decision-makers to personalize outreach.
- Account planning and organizational mapping suggest opportunities to expand seat counts and engage additional personas, including facilities management and executive leadership.



## Retain & Grow Accounts

- Automate hand-off briefs from Sales to CS
- Track churn and expansion signals
- Automate plays to retain, upsell and cross-sell, with actions for AEs and CSMs

**Revenue Agent**

**Personalization Agent**

**Research Agent**

**Smart Account Plans**

# Agents for **Sellers**



IMPROVE PRODUCTIVITY, DEAL VELOCITY, AND WIN RATES



## Build Pipeline

Revenue Agent

Research Agent

Personalization Agent

Sequential Dials



## Close Deals

Meeting Prep Agent

Deal Alerts & Health Scores

Meeting Summaries

Deal Agent



## Retain & Grow Accounts

Research Agent

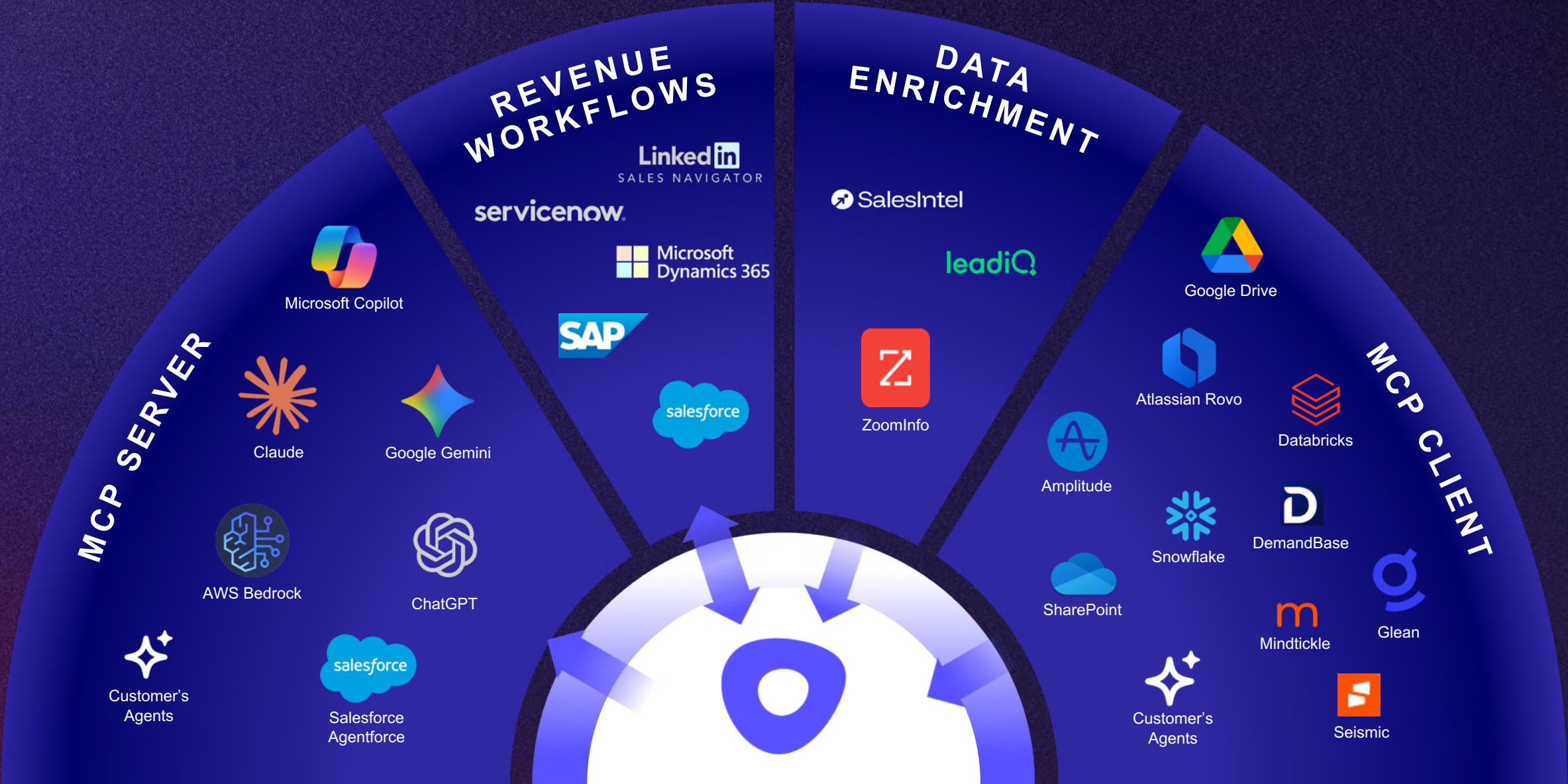
Personalization Agent

Revenue Agent

Smart Account Plans

**OUTREACH OMNI**: Conversational Agent for Any Revenue Workflow

# Agentic Revenue Ecosystem



# Outreach Agentic AI Platform

WHY WE ARE DIFFERENT



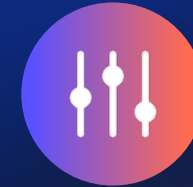
## Act

AI BUILT TO ACT,  
NOT JUST ADVISE



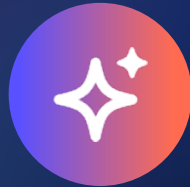
## Scale

TURN EVERY REP  
INTO YOUR BEST REP



## Control

GOVERNED AI  
YOU CAN DEFEND



## AI Agents

ADD CAPACITY  
AND SKILLS

- Eliminate Busywork
- Act with Precision
- Coach in the Moment
- Scale Expertise

**THANK  
YOU ♥**

