

 Outreach Presents

UNLEASH

2026

June 1-3

Scottsdale, AZ



Outreach Presents

UNLEASH 20
26

AI FOR EVERY ROLE

One Agentic Platform for Revenue Teams





Today's Speakers



Kamille Ramirez

Director, Strategic
Programs & Enablement



Chris Hoffman

Senior Customer
Experience Manager

Agenda



01 The Shift

Why agentic AI changes everything

02 Revenue Lifecycle

Where AI plugs into work

03 Pipeline & Execution

SDRs, AEs, Sales Leaders

04 Coaching & Inspection

Frontline Managers, Enablement

05 Forecasting & Retention

RevOps, CS / AM, Sales Leader

06 Why One Platform

Connected execution + takeaways



The Shift



Revenue Teams are Drowning

What's broken today



Buried In Admin Work

Hours every week on research, data entry, and call prep. Selling time keeps shrinking.



Fragmented Tools

A patchwork of point solutions, each with its own data and intelligence. Nothing compounds.



Inconsistent Execution

AI today is reactive — it answers questions but doesn't act inside the workflow where deals actually move.



““ What changes everything is when AI doesn't just assist—it acts inside the workflow.



One Platform. Every Role.

ONE PLATFORM

Pipeline, execution, coaching, forecasting, and retention — all in one place where reps already work.

MULTIPLE PERSONAS

SDRs, AEs, managers, RevOps, and CS each get agents tuned to their job — not a generic copilot.

SHARED DATA + INTELLIGENCE

Every signal, every interaction, every outcome feeds one model of the business. Agents get smarter together.

THE REVENUE LIFECYCLE



Pipeline
Creation



Deal
Execution



Coaching &
Inspection



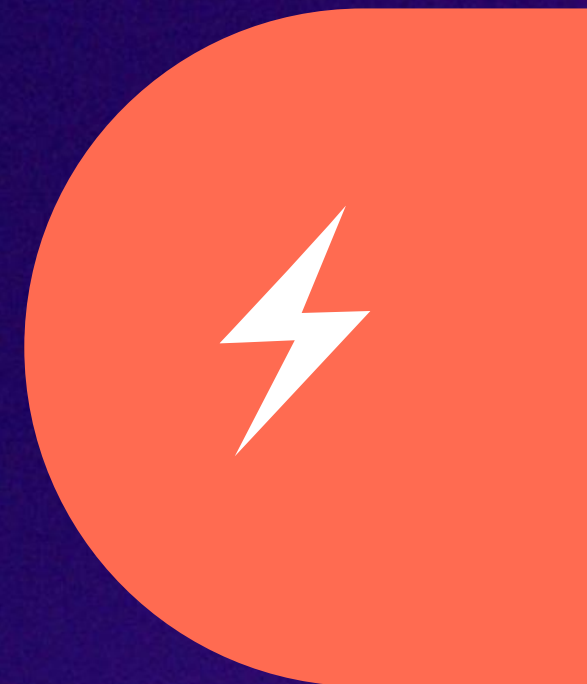
Expansion &
Retention



Forecasting
& Strategy

Outreach Presents

UNLEASH



LET'S PLAY A GAME



Thumbs Up / Down / Sideways



PRACTICE ROUND



Thumbs Up / Down / Sideways





SDR / BDR / AE

Pipeline Creation

The Agent-powered SDR

Less decision-making and guesswork. More execution.



Here's What We Did

- No manual sequencing. Period.
- Tactical signal-backed targeting
- Timely relevant AI-personalized messaging

How did it go?

- **3x pipeline**
- **Prospects contacted** – 110% increase
- **Prospects invited** – 68% increase
- **Opportunities created** – 84% increase
- **Win rate** – 62% increase

100%

of Outreach SDRs' sequence tasks are queued up by **AI Agents**

**More pipeline,
less effort — built
on real signals.**



ACTIVE OUTREACH AI PLAYS

AI Play	Primary Inputs	Audience	Goal	Motion	Execution
High-Intent Play	Website signals, intent signals	Active buyers, prospects	Book meetings	Triggered	Automated
Competitive Takeout Play	Tech stack, intent, campaigns	Target accounts, prospects	Create pipeline	Campaign	Automated
Inbound Lead Follow-up Play	Form fills, intent, MQL	Inbound leads	Fast qualify	Triggered	Automated and Seller Assisted
SDR Outbound Play	ICP, intent, personas	Target prospects	Create meetings	Campaign and Triggered	Automated and Seller Assisted

SPOTLIGHT – INBOUND AGENT



Personalization without sacrificing speed is working

2x

**average inbound
reply rate**

*with AI Agents supporting inbound
follow-up*

5x

**more meetings
booked**

*with AI Agents supporting inbound
follow-up*

90%

**demo MQLs contacted
within 24 hours**

*(Forrester 2026) 35-50% of B2B
sales are won by the first vendor
to respond*

The Art of the Possible



Account & Prospect Intelligence

Executive Summary:

Exec-ready format — on demand

Objection Analysis:

Detailed insight on each account

Product Discussions:

Who is saying what about each product

Customer References:

Extract measurable wins from conversations

Account Risk:

Surface risk signals before they escalate

Churn Analysis:

Why customers churned, and win-back strategy

Marketing-Driven Plays

Inbound Follow-up:

Auto-route and sequence inbound leads

Event Promotion:

Personalized promotion to target accounts

Event Follow-up:

Engage attendees and registrants with personalized signal-based outreach

Outbound Prospecting Plays

Persona Play:

Engage key personas with role-relevant messaging

Compete Play:

Identify and target accounts using competitors

Product & Service Play:

Find and engage best-fit accounts for what you sell

Closed-lost Follow-up:

Feed closed-lost details into AI-crafted messaging

Exec-to-exec Outreach:

AI powered notes from your execs to their execs



AE + Sales Leader

Deal Execution

LET'S PLAY A GAME



Thumbs Up / Down / Sideways



Meeting Prep Agent

From manual research → AI-powered meeting readiness



Meeting Prep Agent
reduces preparation
time by

50%

**More pipeline,
less effort — built
on real signals.**

AI-Powered Meeting Briefs

- Automatically generates prep briefs before meetings
- Surfaces account, attendee, and opportunity insights
- Pulls together past conversations, deal context, and engagement history

Guided Execution for Reps

- AI-generated talking points and opportunity summaries
- Customizable prep sections powered by AI prompts
- Helps reps arrive informed, aligned, and confident

Better Visibility for Managers

- More consistent meeting preparation across teams
- Stronger deal inspection before customer conversations happen
- Reduced risk of missed context or weak execution



Deal Health & Alerts

Prioritize the right deals at the right time

Deal Health

Take the guesswork out of deal inspections and know exactly what deals will get you to quota.

Deal Alerts

Monitor changes to key deal activity and flag risk or momentum automatically.

Clear Prioritization

- Helps reps spend time where it matters
- Avoids wasted effort on low-probability deals

Actionability

- Highlights what's going well and where to focus
- Triggers an Action Item for deal owners, designed to nudge sellers to intervene before deals slip

Example Outputs

- Stakeholder disengagement, no next meeting scheduled, late-stage inactivity, and more

Customers using Deal Health see a
12ppt increase in win rates

Deal Health & Alerts

Prioritize the right deals at the right time

The screenshot displays a CRM interface with a table of opportunities and a detailed view of a specific opportunity.

Opportunities Summary:

- Total: 70
- Cold / Not Started: 16
- Open - Not Contacted: 32
- Working - Contacted: 12
- Closed - Not Converted: 5
- Approaching: 2
- Replied: 2
- Do not Contact: 1

Opportunities Table:

Name	Health	Alerts	Actions	Prospects	Methodology
Acme Co - Expansion Acme Co	55 ↑	1	4	3	M E D
ABC Corp - Renewal Acme Co	10 ↑	-	2	3	M E D
Beta - Expansion Acme Co	34 ↑	3	-	3	M E D
Acme Co - Expansion Acme Co	55 ↑	2	3	3	M E D
ABC Corp - Renewal Acme Co	25 ↑	-	-	3	M E D
Beta - Expansion Acme Co	47 ↑	4	1	3	M E D
Total					

ABC Corp - Renewal Detail View:

- Value: \$30,000 | Closes Dec 18, 2024 | Discovery
- Alerts & health: 6 Alerts
- Alerts:
 - No prospect response in last 15 days (Mon, Dec 15, 3:08 PM (1 day ago))
 - Kaia sentiment is negative (Mon, Dec 15, 3:08 PM (1 day ago))
 - Number of prospects involved is less than 4 (Mon, Dec 15, 3:08 PM (1 day ago))
 - No next meetings scheduled in last 15 days (Mon, Dec 15, 3:08 PM (1 day ago))
- Health insights: 55 (On track) ↑ 3 Last 7 days

Never miss a critical deal update to better maintain deal momentum.

Deal Agents

Surface the right deal insights to keep deals on track



Automatic Data Capture

Automatically update deal data to keep data accurate and remove the burden of manual edits.

Example Outputs

- Alignment with your sales methodology
- Accurate updates to key opportunity fields
- No more manual edits or human bias

Summarized Deal Insights

Automatically generate custom deal summaries to catch up on deal status during forecast reviews.

Example Outputs

- Surface stalled buying signals
- Identify key stakeholders or weak multithreading
- Summarize customer objectives, commitments, and purchase drivers for AE to CSM handoff

Deal Agent saves
15-21 mins/day



FLM + Enablement

Coaching & Inspection

LET'S PLAY A GAME



Thumbs Up / Down / Sideways



AI Auto-Scored Coach Cards

Prioritize the right deals at the right time



Real-Time Behavioral Reinforcement

- AI auto-scores conversations against coaching criteria
- Feedback tied directly to real customer interactions
- Reinforcement happens continuously across the workflow

Coaching @ Scale

- Highlights what's going well and where to focus
- Triggers an Action Item for deal owners, designed to nudge sellers to intervene before deals slip

Data Driven Performance Insights

- Discovery Quality
- Next-Step Discipline
- Value Delivery
- Objection Handling
- Competitive Positioning
- Messaging Consistency & Aderence

When deals are supported by Outreach Kaia customers see

11ppt increase in win rates

AI Topics Explorer

From anecdotal coaching → org-wide revenue intelligence



Proactive Coaching & Enablement

- AI automatically identifies themes and trends across conversations
- Surface patterns across teams, segments, and pipeline stages
- Analyze what customers are actually saying in real interactions
- CI at scale, uncovering objection trends, product feedback, pricing concerns, messaging gaps, emerging risks or opportunities, etc.

From Inspection to Strategic Insight

- Managers coach based on real behavioral patterns
- Enablement adapts programs using live conversation data
- Revenue leaders gain visibility into what's happening in-market

18%

Shorter sales cycle when deals are supported by Outreach Kaia

AI Topics Explorer

From anecdotal coaching → org-wide revenue intelligence

The screenshot displays the Kaia AI Topics Explorer interface. At the top, the Kaia logo is on the left, and search, refresh, and share icons are on the right. A navigation bar contains several tabs: Recordings, Content cards, Team trends, Playlists, Coach cards, Coach cards report, Coaching metrics, Topics report, and AI topics explorer (which is selected). Below the navigation bar, the page title is "AI topics explorer" with a subtitle "Explore how topics appear in conversations and how they relate to deal outcomes." and a note "Based on data".

The main content area is divided into a left sidebar and a main panel. The sidebar, titled "Topics", lists "Acme SnapStats" and "Quortex competitor". The main panel features a highlighted insight: "Acme SnapStats came up in 200 of 1,000 deals (20%), with those deals closing at a 71% win rate." Below this, it notes "300 meetings of 2,000 (15%)".

The section "How does this show up in conversations?" explains that when Acme SnapStats is discussed, certain patterns are observed. It includes a sub-section "What are buyers trying to evaluate or understand about this product?" with the text: "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." This section also lists sources: "Geometric Corp. / Acme Co. Sync" (Mar 14, 2026) and "Makeit Co. / Acme Co. Demo" (Mar 24, 2026). Another sub-section, "What concerns or objections are raised when this product is discussed?", notes that buyers express concerns about the reliability and accuracy of insights generated by Acme SnapStats, particularly when decisions are driven by automated analysis.

Reveal trends & emerging themes by aggregating insights across accounts.



CS / Account Management

Expansion & Retention

Agent-Sourced Pipeline from Customer Base



Turn customer insights into smart, effective actions.

27%

Reply Rate from
NPS Agent

**More pipeline,
less effort — built
on real signals.**

Here's What We Did

- Pulled key insights like usage into Outreach
 - via Custom Objects, Snowflake Connector, and MCP
- Built research agents to surface expansion signals
- Leaned into AI to create high-value conversations

Let's Get Specific

- NPS (Net Promoter Score) Agent
- H2 Renewal Rally Agent
- CRO to CRO Agent
- EBR Scheduling Agent



The Art of the Possible

Retention & expansion plays



Expansion Play

Detect growth signals in an account and automatically engage the right stakeholders with a tailored expansion or upsell conversation.



Churn Prevention

Identify churn risk signals early and proactively engage at-risk accounts with personalized, insight-driven messaging to re-engage and improve sentiment.



NPS Follow-up

Act on NPS feedback automatically – routing respondents into Sequences with messaging personalized by their commentary to address sentiment and drive conversations forward.



Renewal Play

Engage renewal stakeholders ahead of the close date with research-backed messaging that reinforces value and drives towards a business review or renewal conversation.



RevOps + Leadership

Forecasting & Strategy

LET'S PLAY A GAME



Thumbs Up / Down / Sideways



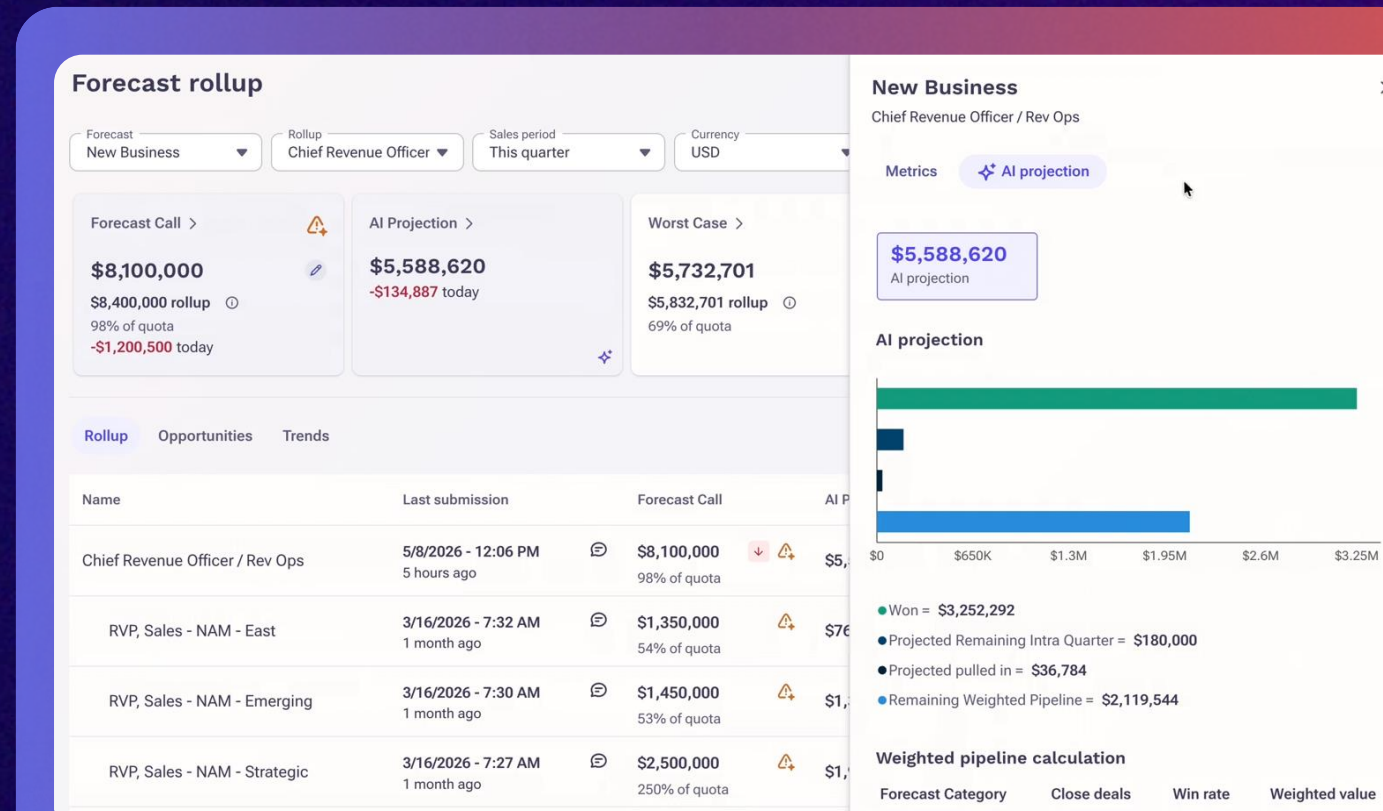
AI Forecasting

Stop questioning your number.



Build confidence in your path to quota:

- Know exactly where you'll finish the quarter
- Identify at-risk deals that may need to be pulled
- See how forecast metrics trend over time and where you might be going off track
- Test and model different scenarios to find the path to hitting your number



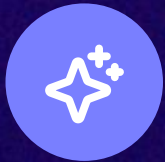


“None of this works if the intelligence is disconnected.”



What This Means For You

Three takeaways



AI is a Workflow Shift

Not a feature you bolt on. It's a fundamental change in how revenue work actually gets done.



Value Compounds

The wins compound when agents work across roles on shared data — not in isolated silos.



Start with Real Friction

Pick the high-friction, high-volume workflows first. Skip the shiny demos. Ship outcomes.

**THANK
YOU ♥**

