

 Outreach Presents

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# Driving AI Success with a Center of Excellence





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# Agenda



## 01 What is a CoE?

Best practices, framework, and pillars

## 02 Staffing Model

Platform roles and Amplify responsibilities

## 03 Putting AI to Work

Adoption, workflows, and scaling AI programs

## 04 Operations Function

Admin, content, enablement, and reporting

## 05 Powering Your CoE

Measurement, scaling, and discovery



“  
**The teams that govern AI win.  
The CoE is that governance.**

— Outreach Customer Success Insight

# What is a CoE?



Unifying teams and processes for scalable, iterative, and measurable success



## People

Right roles and cross-functional collaboration. Covers platform ownership, content quality, AI agent performance management, and executive sponsorship.



## Process

Repeatable, flexible workflows that standardize execution across platform admin, content, reporting, change management, and agentic AI deployment.



## Playbooks

Documented best practices covering onboarding, sequence governance, Amplify agent deployment, Kaia adoption, and ongoing enablement programs.

# North Star Best Practices



Outreach customers that realize the greatest outcomes consistently embrace these practices:

## Visible Sponsorship

Success starts with visible alignment from sales, marketing and ops leadership, as well as Outreach partnership.

## Measure, Adjust & Iterate

Define measurable, time-bound goals at every level: individual, team, and organization. Adjust and iterate based on data.

## Establish Global Standards

Ensure consistent standards and drive alignment across all regions and business units. Cross-org consistency accelerates scale.

## Drive Adoption & Engagement

Accelerates seller productivity and ensures teams realize the full value of platform investments. Adoption is a team sport.

# Operational Excellence

## Sales Transformation

### Know

- Standardized tool sets
- Strategic prioritization
- Primary stakeholder
- Approval process(es)

### Say

- Cross-org collaboration
- Communication strategy

### Do

- Validation & Approval of capabilities
- Measure performance
- Recognize success
- LOB/field enablement



### Steering Committee Alignment

#### Operations

- Platform Admin & Support
- Content & Marketing Alignment
- Change Management and Communication
- Reporting/dashboarding capabilities



#### Process

- L&D engagement and development
- Process & Workflow standardization
- Data sourcing and engagement alignment
- Resource coordination and project alignment



#### Technology

- Release, Enhancement and capabilities prioritization
- Holistic alignment of existing and new tools
- Vertical business alignment and integration

#### Sales Strategy and Execution

- AI Agent use case management
- Prompt / content writing and verification
- Data & CRM integrations
- MCP Integrations

- Change management / comms
- Workflow & accountability orchestration
- Agentic/Gen AI adoption management
- Agent performance management

Execution

Administration

Content

Sales  
Methodology

Amplify  
(Agentic AI)

Forecasting

Enablement

Account Team Partnership

Professional Services Consultant(s)

Managed Services

Technical Account Manager



# Recommended Staffing Model



# Amplify Program - Roles & Responsibilities



Roles may sit in different functions depending on org size.  
What matters is that all four responsibilities are covered.

## RevOps Platform Admin

Owens: Platform, Data & Technical Infrastructure

- Manages CRM, data, & integration layer (Salesforce, Zoominfo, Snowflake, MCP)
- Maintains user provisioning, permissions, & team structures
- Troubleshoots platform failures, API connections, & system health
- Owns Outreach instance governance & technical documentation
- Manages webhook configs & data routing between systems

## GTM Architect

Owens: Program Management & Rigor

- Project manages all Prompt Builders & BPs running plays
- Maintains the master Plays Documentation log
- Enforces reporting cadences & GTM review cycles
- Ensures every play is measured & nothing slips
- Acts as internal conductor between RevOps and Sales

## GTM Engineer

Owens: Agent Design, Prompts & Sequence Execution

- Writes, tests, & iterates AI agent prompts in Outreach
- Configures agent settings, signal logic, & persona targeting
- Builds & manages sequences tied to each play
- Documents proven prompt structures & sequence templates
- QAs agent output for tone, accuracy, & conversion readiness

## Sales Leadership

Owens: Play Vision & Outcomes

- Identifies business need for new plays based on market feedback & pipeline gaps
- Defines what success looks like for each play
- Reviews results at cadence check-ins
- Makes go/no-go decisions on expanding or retiring plays

# Recommended Platform Staffing Model



All four responsibilities must be covered - roles may sit in different functions depending on org size

## Outreach Admin

- User provisioning & team mgmt
- Platform config & troubleshooting
- Meeting types, triggers & rulesets
- Coordinate Outreach training
- Work with Outreach CSM

## Content Manager

- Build/modify sequences & templates
- Manage A/B testing & results
- Update content & gather feedback
- Report content effectiveness
- Collaborate with marketing

## Outreach Strategy

- Adoption & effectiveness reporting
- Content strategy reporting
- Executive business review POC
- Identify goals and metrics
- Drive program visibility

## Forecasting & Enablement

- New hire training programs
- Ongoing user education
- New product features enablement
- Metric reports with Dynamics admin
- Pipeline visibility reports



# Making AI Stick





**Excellence isn't accidental.  
It's architected.**

# Operationalizing AI



## Workflow Execution + Optimization

Audit • Document • Optimize

## Putting AI to Work

Plan • Implement • Adopt

## Measurement + Impact

Monitor • Report • Baseline

## Scaling + Expansion

Expand • Roadmap • Scale



# Why Most AI Agent Programs Stall Before They Scale

Successful AI agent programs don't happen by accident - they require intentional structure, clear ownership, and consistent governance

## 1. No Structured Intake

Requests arrive informally. Without structured intake, RevOps teams spend more time clarifying than building. Agents queued without a defined signal, persona, or goal.

## 2. Cross-Functional Dependencies With No Owner

Launching an agent may need Product Marketing, Sales, and RevOps. No single team owns the handoff, so requests stall across org boundaries.

## 3. Paralysis by Complexity

Teams want their first agent to be perfect - full signal logic, custom personalization, multi-step sequences all at once. This delays launch and produces underwhelming results.

## 4. No Feedback Loop After Launch

Agents go live and sequences run - but nobody tracks results. Without closed-loop reporting, teams can't build AI fluency or earn stakeholder trust.

# Putting AI to Work



Turning AI on is easy. Getting reps to use it is the hard part.

## What Good Looks Like

Reps are using AI consistently, not just the power users. Adoption is visible, measurable, and tied to outcomes leadership actually cares about.

## Where Teams Get Stuck

AI gets enabled without a rollout plan. No one owns adoption, reps use it inconsistently, and six months in nobody can tell you if it's actually working.

## What to do About It

Start with one use case and set a baseline before you go live. Pair the rollout with enablement, and assign an internal owner — not just an admin, someone who can champion it.



# Operations Function





**You can't scale what  
you haven't operationalized.**



# Platform Administration & Support

Improve and maintain Outreach platform and processes through a regional and global viewpoint

Designated Outreach Administrator

Internal User Support

User Activation

Functional / Technical Configuration

Audit / Platform Hygiene



# Content Creation & Management

Support sales strategies and goals with content development and execution

Content Authoring

Measuring Effectiveness & Optimization

Content Management & Planning

Governance & Control

Translation / Localization



# Enablement & Change Management

Drive user enablement and continued development; communicate value, changes, and best practices

Internal Communication Pathways

Enablement & Continuing Education

Feedback Loops

Leadership Actions

Reinforcement Channels

Office Hours & Launch Support



# Reporting

Measure performance and overall progress against program goals

Established Baselines

Reporting Cadence

Stakeholder Visibility

Report Deliverability

Business Analytics



# How You Can Power Your CoE



**Without structure  
even the best tools collect dust.**



## Workflow Execution + Optimization

Review • Document • Align

## Putting AI to Work

Plan • Implement • Adopt

## Measurement + Impact

Monitor • Report • Baseline

## Scaling + Expansion

Expand • Roadmap • Scale

# Workflow Execution + Optimization



## What Good Looks Like

Reps follow consistent processes because the workflows were built around them. Every sequence has a clear purpose, an owner, and a metric that tells you if it's working.

## Where Teams Get Stuck

Sequences get built in silos and never revisited. No one knows what's live or why. Reps work around broken processes instead of flagging them.

## What to do About It

Run a quarterly audit with your managers. Document what's live, what's working, and what needs to go. Keep it in one place your team can actually find and use.

# Measurement + Impact



## What Good Looks Like

Your team can show leadership exactly what changed, why it changed, and what it's worth without scrambling to pull numbers the night before a QBR.

## Where Teams Get Stuck

No baseline was set before the change went live. Reporting is reactive, pulled on request, and inconsistent. Nobody owns it so nobody does it.

## What to do About It

Set your baseline before anything goes live. Pick 3-5 metrics that matter to leadership, assign a reporting owner, and put it on a recurring cadence, not just when someone asks.

# Scaling + Expansion



## What Good Looks Like

When a new team onboard, it feels deliberate and planned. You have a repeatable process, a readiness checklist, and leadership can see what's next on the roadmap.

## Where Teams Get Stuck

Scaling happens because someone asked, not because there's a plan. New teams get a copy-paste of what the first team did with no customization and no success metrics.

## What to do About It

Build a readiness checklist before expanding to any new team. Document what worked and what didn't. Treat every expansion like a new implementation, same rigor, adapted to the team.



# Key Questions to Get Started



# Key Questions

Do you have an existing CoE within your Sales organization?

Who owns Outreach adoption strategy?

How are CoE priorities communicated?

How are challenges escalated?

How is the roadmap for scaling to newteams/Bus defined?

How is feedback captured for future CoE updates?



# Operations Area

Who will be the designated Outreach Administrator?

How will Users get internal support as needed?

How will new users be provisioned and decommissioned as needed?

Who will own and define the Outreach functional and technical configuration as tweaks and changes are needed?

Who will be keeping the platform clean and audited?

What are the internal communication pathways?

What are the feedback loop options?

Who is responsible for providing ongoing reporting and establishing baselines?

How are KPIs tracked?

How are gaps addressed?



# Process Area

How are workflows documented to align with strategy?

Approach for expanding to new teams/BUs?

How are workflow changes reviewed with new features?

How are workflows reviewed for pain points?

Regular audit cadence to ensure ongoing value?

How are engagement and data monitored?

Process for CRM sync issues?

Frequency of data review for feature utilization?

What are the processes for continued enablement and reinforcement as needed?

Who communicates the new feature and capabilities to position their value to users



# Technology Area

Who is responsible for vetting and approving AI usage across the organization?

What organizational requirements guide AI capability selection and adoption?

How are AI capabilities planned, implemented, and operationalized?

What internal stakeholders need to be involved early?

What Infosec or internal approvals are required before business teams can consume AI solutions?

How are these approvals coordinated today?



# Amplify Area

Who is responsible for vetting and approving the use of AI in the organization?

How are new use cases for AI agents identified?

Who writes and manages the creation of new prompts?

What is the process when new CRM fields are required for integration with AI tools?

How will AI outcomes be measured and reported on?

How will new opportunities to utilize AI in Sales strategy be identified?

Who is responsible for incorporating AI into the sellers workflow and enablement plans?

How are recommendations for AI driven sales strategy surfaced to the right stakeholders based on outcomes seen in the platform?



# You Have What You Need to Start

Build the foundation.  
The rest follows.

✓ Proof its working

✓ A model that scales

✓ AI that sticks

✓ Clean workflows

**THANK  
YOU ♥**

