

Outreach Presents

UNLEASH 20
26

Sequence Administration

From Fundamentals to AI Agents



Meet the Team



Stacey Young

Senior Managed Services Consultant

Stacey is a Senior Managed Services Consultant at Outreach, working with customers to get more out of Outreach and drive meaningful results. He brings experience across Professional Services, Training, and Managed Services, helping teams double down on what's working, fix what isn't, and better align sales and RevOps. He focuses on turning ideas into action and building practical, repeatable processes that teams actually use.



Ricky Cookson

Senior Professional Services Consultant

Ricky is a Senior Professional Services Consultant at Outreach with a background spanning sales, marketing, and GTM consulting. Having started as an Outreach end user, he leads implementation, deployment, and optimization with a user-centric perspective and a focus on scaling seller execution, streamlining admin management, and ensuring leadership has the pipeline visibility they need to drive revenue.

Agenda



01 Sequence Best Practices

Impactful Organization
Auditing & Curating
Strategic Change Management

03 Revenue Agent

Revenue Agent Basics
Creating Workflow-Centric Agents

02 Personalization Agent

Building Effective Prompts
Assessing Agent Outputs
Agent Metrics & KPIs

04 Q&A



Sequence Best Practices

The Impact of Organization



Naming Conventions | Collections | Teams | Smart Views



Standardize Form

- Standardizing is for reps & reporting
- Workflow + Use Case + Industry / Persona
- Team input over everything



Resonate & Recognize

- Use parameters that are workflow-aligned and easy to recognize
- Naming Convention + Color Code
- Admin Win, Rep Win and Manager Win



Save & Assign

- Make finding content easy
- Assign to Teams
- Assign in Profiles
- Make room for change

Auditing & Curating Sequence Libraries



Create & Execute | Assess & Iterate | Prioritize & Archive



Creation SOPs

- Governance & Permissions
- Timeline to metrics & review
- Criteria for execution + assessment



Performance Review

- Content KPIs by Use Case
- Adjust appropriately
- Reset the timer and let reps execute



Emphasize What Works

- Highlight what works / what doesn't
- Emphasize effective content & make it easy to use
- Archive low performers, remove noise

Leaning into Change Management



Vision | Communication | Program | Adoption



Culture & Landscape

- Outline the what & the why
- Set the standard, repeat the vibe
- Pinpoint scope of change and align



Communication Plan

- Champion identification+ alignment
- Address resistance and blockers
- Position the win and the loss



Feedback & Recognition

- Clear path for feedback
- Continuous improvement
- Adjust, review, scale



Personalization Agent



Personalization Agent Demo



Personalization Agent

Enhancing your sequences with AI-powered personalization

Personalization Agent allows you to customize your messaging to improve conversion rates with pre-defined prompts.

The screenshot shows an email sequence from Alena Kenter, VP of Sales at Geometric Corporation. The email is titled "Driving AI Success at Geometric Corporation" and is addressed to Alena. The content of the email is as follows:

Hi Alena,

I saw you recently joined Geometric Corporation as a VP of Sales - Congratulations! It's an exciting time in AI-
via monitoring & analytics.

Sales leaders often focus on helping their teams reduce repetitive tasks and improving productivity.

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. | AI

Let's connect this week.

Frank

The email is annotated with three callouts:

- Recent job change:** Points to the text "I saw you recently joined Geometric Corporation as a VP of Sales".
- Identified challenge:** Points to the text "Sales leaders often focus on helping their teams reduce repetitive tasks and improving productivity."
- Our value proposition:** Points to the text "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. | AI".



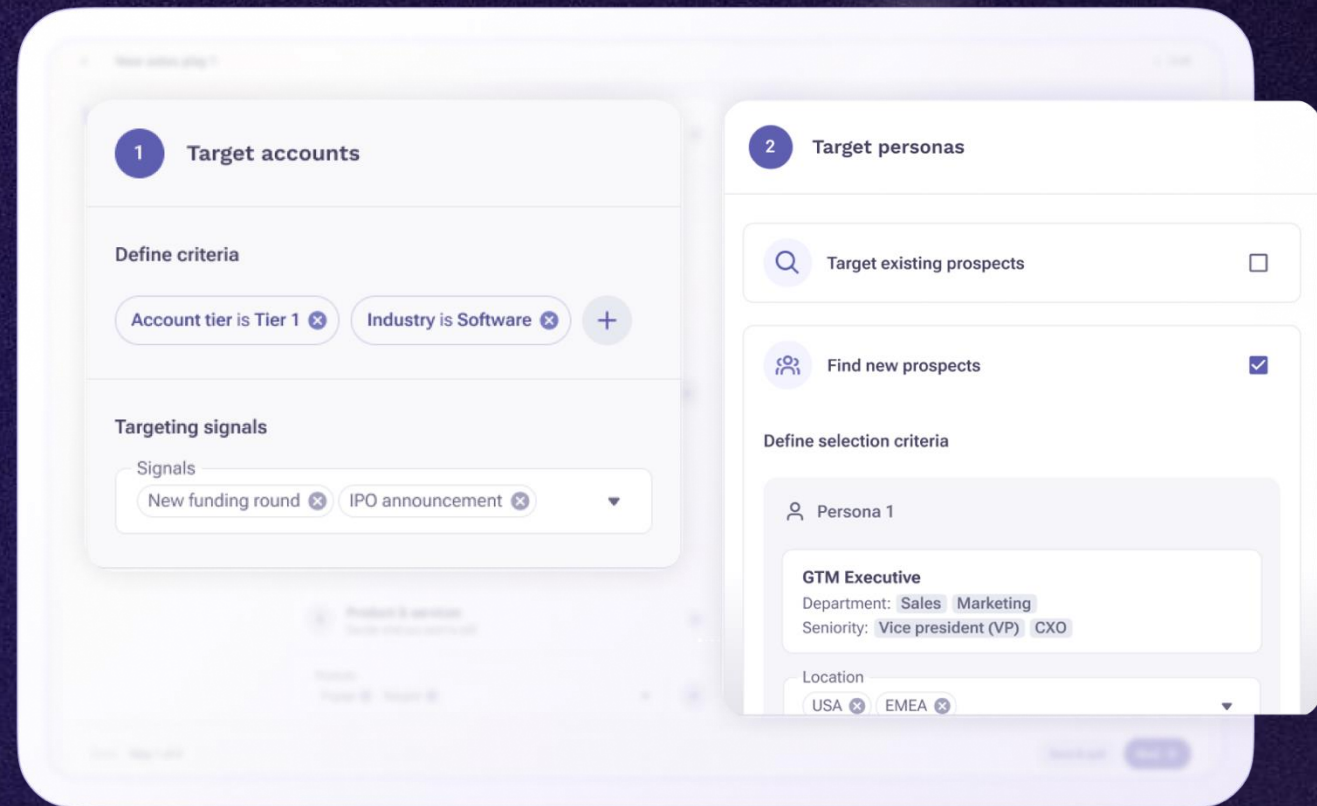
Revenue Agent



Revenue Agent

Your automated seller

Revenue Agent brings all your personalized content together to activate high-intent accounts with precision and scale.





Revenue Agent Demo

AI Agent Outcomes



Outreach

10 hrs

saved each week

3x

higher reply rates

99%

faster speed
to lead

2x

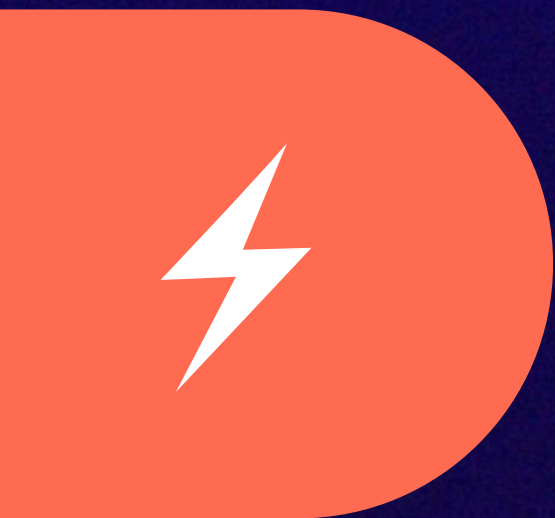
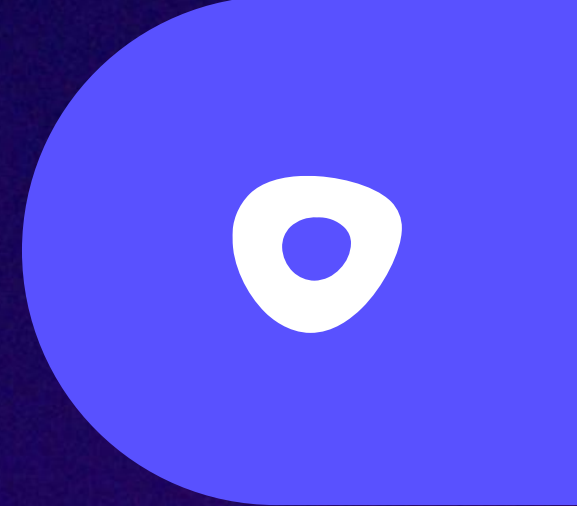
reply-to-meeting
conversion rate



Q&A

**THANK
YOU ♥**

2020



2020