

 Outreach Presents

# UNLEASH

2026

June 1-3

Scottsdale, AZ



Outreach Presents

**UNLEASH** 20  
26

# Uplevel Team Performance with AI Coaching





# Meet the Team



**Duncan Meyers**

EMEA Lead Professional Services Consultant



**Ed Matanes**

Product Marketing Manager



# A Good Caddie Doesn't Show Up on the First Tee and Start Giving Advice.



## Most Teams Do This

- Build coach cards without knowing what to coach
- Create topics based on gut feeling
- Review calls reactively, not systematically
- Reps get inconsistent feedback, too late



## What Actually Works

- Start with reporting: understand the terrain
- Find out what top reps do differently
- Identify where deals stall and why
- Then build coaching around real patterns

# Reporting First. Everything Else Follows.



START HERE



Reporting

Find the signal.  
What works, what  
doesn't, where  
the gaps are.

Topics

Turn patterns  
into trackable  
coaching themes.

Coach Cards

Reinforce specific  
behaviors at the  
right moment.

Content Cards

Put the right  
guidance in  
the workflow,  
not a folder.

# Visibility Changes Everything



## Without Conversational Intelligence

- Managers manually hunt for coaching moments
- Coaching based on gut feel, not trends
- Reps get inconsistent, late feedback
- Coaching is inconsistent and hard to scale

## With Conversational Intelligence

- Reporting surfaces trends automatically
- Managers coach on patterns, not one-off calls
- Reps get real-time guidance in the flow of work
- Faster ramp, more consistent execution

**11**

Days Faster  
Sales Cycle

**+30%**

Rep  
Productivity

**+45%**

Avg. Deal  
Size

**+26%**

Win  
Rate



# Housekeeping

# Agenda



**01 Custom Topics**

**04 Omni**

**02 AI Topics Explorer**

**05 Blueprint for Success**

**03 Auto Coach Cards**



# **RevOps & Admins**

From Reactive Support to  
Proactive Revenue Driver



# Custom Topics

Reveal trends and emerging themes by aggregating insights across accounts.

Uncover whether reps are leveraging the right messaging, adhering to your sales methodology, or a new competitor gains traction.

Topics 33 results

[Add topic](#)

| Name              | Type    | Description   | Samples trained | Accuracy ⓘ | Status   | Last published | Last updated                                   |
|-------------------|---------|---|-----------------|------------|--|----------------|--|
| Unleash           | Product | Detect mentions of upcoming Outreach Unleash conference   | 0               | —          | <span style="color: green;">●</span> Published | 6/4/2025       | 6/18/2025 by Shannon Ring <span>⋮</span>       |
| Kaia              | Product | Outreach's Conversation Intelligence solution   | 0               | —          | <span style="color: green;">●</span> Published | 5/1/2026       | 5/1/2026 by Neil Deason <span>⋮</span>         |
| Recording Consent | Custom  | Identifying when a customer does not wish to be recorded  | 43              | —          | Unpublished                                    |                | 5/7/2025 by David Brown <span>⋮</span>         |
| Tech Stack        | Custom  | Detects when a prospect is sharing/confirm which technology tools they currently have in place. | 26              | —          | <span style="color: green;">●</span> Published | 2/21/2025      | 2/21/2025 by Michael Zuver <span>⋮</span>      |
| Timing Concerns   | Custom  | Detects when objections are raised around timing.   | 125             | 81%        | <span style="color: green;">●</span> Published | 3/16/2026      | 11/5/2024 by Andreina Dominguez <span>⋮</span> |



# AI Topics Explorer

Reveal trends and emerging themes by aggregating insights across accounts.

Surface key business insights from Kaia recordings about Product and Competitor topics.

- Win against competitors by identifying themes in how they are positioning against you
- Address new product gaps early with aggregated insights like common objections, missing features, or pricing friction

The screenshot displays the Kaia AI Topics Explorer interface. At the top, the Kaia logo is visible, followed by navigation tabs: Recordings, Content cards, Team trends, Playlists, Coach cards, Coach cards report, Coaching metrics, Topics report, and AI topics explorer. The main heading is 'AI topics explorer' with a subtitle: 'Explore how topics appear in conversations and how they relate to deal outcomes.' A search icon and a 'Based on data' indicator are also present.

On the left, a 'Topics' sidebar lists 'Acme SnapStats' and 'Quortex competitor'. The main content area features a highlighted insight: '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%)'. Below this, a section titled 'How does this show up in conversations?' explains that when Acme SnapStats is discussed, common patterns include questions about product evaluation and concerns about reliability and accuracy.

**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



# Deep Dive

## AI Topics Explorer



# AI Topics Explorer

- 1 Works from existing custom topics
- 2 Keywords help train the topic explorer

### Edit a product topic

For help and best practices, view our [support article](#)

---

**Product name**

1

**Details**

**Description**

Explain the purpose of this topic to help others understand what it's detecting.

40 / 300

**2 Keywords**

Provide at least 1 word or name to detect in conversations.

Add multiple keywords at a time by pressing **Enter** after each entry



# AI Topics Explorer

- 1 Understand how often product mentions show up in deals and what your win rate is.
- 2 Learn what buyers are saying about your product and surface key themes like common objections, pricing friction, or missing features.
- 3 Get transparency into exactly which conversations informed these insights.

### AI topics explorer

Explore how topics appear in conversations and how they relate to deal outcomes.

Topics

1 Amplify was mentioned in meetings of deals. Deals referencing Amplify had a win rate. across

How does Amplify show up in conversations?  
When Amplify is discussed, the following patterns are most commonly observed across conversations:

2 What are buyers trying to evaluate or understand about Amplify? ^

Buyer evaluation focuses on ai agent capabilities and integration — Buyers consistently focus on understanding how Amplify's AI agents automate and personalize sales workflows, including prospecting, research, outreach, and deal management. They inquire about specific AI agent use cases such as research, revenue, personalization, and deal agents, and how these integrate with existing tools like Salesforce, Zoominfo, Claude, Outreach Kaia, and other third-party data sources. Buyers evaluate Amplify's fit within their current tech stack and sales processes, seeking clarity on credit consumption models and the potential productivity gains, personalization at scale, and pipeline impact Amplify can deliver.

3 Sources v

What concerns or objections are raised when Amplify is discussed? v



# AI Topics Explorer

- 1 Learn how sellers are positioning your products.
- 2 How is the buyer comparing you to the market?

**Kaia**

Recordings Content cards Team trends Playlists Coach cards Coach card report Coaching Metrics **AI topics explorer**

- 1** **How do sellers describe and position Amplify in the conversation?**  
Sellers emphasize amplify as ai-driven workflow automation enhancer — Sellers consistently position Amplify as a comprehensive AI agent platform designed to automate and personalize sales workflows, reducing manual tasks and increasing efficiency. They highlight deep integration with CRM systems and third-party data providers such as [redacted]. Sellers articulate value in terms of time savings, increased reply rates, improved pipeline generation, and enhanced sales execution. They address objections by demonstrating use cases, sharing success stories, offering demos, and emphasizing professional services for implementation, training, and ongoing optimization. The narrative stresses Amplify as a differentiator that complements existing workflows and future-proofs sales processes.
- 2** **How do buyers and sellers compare Amplify to alternatives?**  
Amplify compared to competitors and internal solutions — Buyers and sellers frequently compare Amplify to legacy sales engagement tools and competitors [redacted]. Discussions focus on feature parity, integration capabilities, pricing, and AI functionality. Amplify is positioned as a more integrated and AI-driven platform, with emphasis on its agentic AI workflows, deep CRM integration, and consumption-based pricing model. Buyers evaluate trade-offs related to cost, ease of use, implementation complexity, and the ability to consolidate multiple tools into a single platform. Some buyers express skepticism about Amplify's maturity or fit for their industry, while sellers emphasize Amplify's unique AI-driven features and extensibility.



# Questions?

AI Topics Explorer



# Smart Kaia Coach: Automated Scoring

Deliver feedback to your teams faster  
with automatic scoring of coach cards.

Admins can configure:

- Which calls they want to auto-score
- What criteria they want the AI Coach to listen for and provide feedback on
- How each category should be weighted

The screenshot displays the Kaia interface for configuring auto-scoring for a specific call. The main panel shows the 'AE discovery call' with a list of questions and their weights. A 'Nice work' notification indicates that the weighting is configured. A feedback summary is also visible.

| Question   | Weight |
|--|--------|
| Question 1 - Single Choice: What is your overall score for this call?  | 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%    |
| Question 4 - Rating: AE is competent in competitive differentiators. Shared a story or example to overcome objection / address a question. | 4%     |
| Question 5 - Rating: AE is competent in competitive differentiators. Shared a story or example to overcome objection / address a question. | 29%    |

**Feedback Summary:**  
The speaker mentions the purpose of the meeting and agenda but does not test the scored by and scored four filters but does not have a clear, structured agenda or direction beyond testing. The agenda is somewhat defined, but not clearly.



# Deep Dive

Smart Kaia Coach: Automated Scoring



# Auto Coach Cards

1 Auto-scoring criteria

2 Coach card questions

The screenshot shows the Kaia interface with a navigation bar at the top containing 'Recordings', 'Content cards', 'Team trends', 'Playlists', 'Coach cards', 'Coaching Metrics', 'AI topics explorer', and 'Topics report'. The 'Coach cards' section is active, displaying a list of cards. The selected card is 'Amplify Discussion - AS', which is highlighted with a blue circle '1'. This card has an 'Auto-scoring' feature, indicated by a star icon and the text 'Auto-scoring 3 supported questions, 3 filters, visibility set to everyone', with an 'Active' status and a settings gear icon. Below the card, the 'Questions' section is visible, containing three questions: 1. 'What is your overall score for this call?' with a star rating (5 stars) and a blue circle '2' next to it. 2. 'The rep is able to clearly articulate the value of Outreach Agent AI, with unique tie ins to the persona / use case.' with radio buttons for 'Yes' and 'No'. 3. 'Rate the strength of the Amplify Talk Track' with a star rating (5 stars).

# Auto Coach Cards



**Kaia**

Recordings Content cards Team trends Playlists **Coach cards** Coaching Metrics AI topics explorer Topics report

**Coach cards** +

- Coach card 1
- Coach card 2
- Coach card 3
- Coach card 4
- Coach card 5
- Coach card 6
- Amplify Discus...** ✨
- Coach card 8
- Coach card 9
- Coach card 10
- Coach card 11
- Coach card 12

### Amplify Discussion - AS

For help and best practices, view our [getting started guide](#).

- Rate the strength of the Amplify Talk Track  
☆☆☆☆☆
- Outline specific feedback that the rep could improve on for next time  
Add your response
- What objections were raised by the customer or prospect in the call and how did the rep handle them?  
Add your response
- How well did the rep set up for next steps regarding Amplify?  
☆☆☆☆☆

+ Add question

Last published on 5/13/2026 Publish



# Auto Coach Cards

1 Auto-scored coach card

2 Qualitative feedback

The screenshot displays the Kaia AI Agent Demo interface. On the left, a video player shows a recording titled "Recording info" with a "View all" link. The recording details include: Time, Account, Opportunity, Stage, and Deal value. The attendees list shows 5 participants. The video player has a progress bar at 00:00 / 01:02:56 and a volume icon. Below the video player are tabs for "Speakers", "Topics", and "Analytics".

On the right, the "Coach cards" section is visible. The first card is titled "Amplify Discussion - AS" and is auto-scored on 5/20/2026. It includes a question: "What is your overall score for this call? \*" with a 5-star rating. The feedback text states: "The rep is able to clearly articulate the value of Outreach Agentic AI, with unique tie ins to the persona / use case." Below this, there is a "Rate the strength of the Amplify Talk Track" section with a 5-star rating and a feedback comment: "demonstrated a highly detailed conversation s prospect pain points related to automation, agentic AI, n work, and unclear outreach priorities. actively uncov needs for Amplify and discussed its features, including".

Two callout boxes with numbers 1 and 2 are overlaid on the interface. Callout 1 points to the "Amplify Discussion - AS" card, and callout 2 points to the feedback text below it.


# Auto Coach Cards



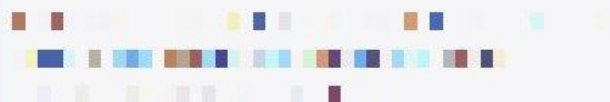
Summary   Ask Kaia   Transcript   **Coach cards**   US

Outline specific feedback that the rep could improve on for next time

Feedback



Feedback



What objections were raised by the customer or prospect in the call and how did the rep handle them?

Feedback

Several objections or concerns were raised by the customer or prospect during the call. One key objection was about the use of '100% AI for outbound messaging,' where the prospect expressed the team's reluctance and asked about the ability to

Feedback

handled objections and concerns by providing clarifications, confirming system capabilities, and explaining features in direct response to the customer's questions and objections.



# Auto Coach Cards

1 Always on coaching

**Kaia**

Recordings Content cards Team trends Playlists Coach cards **Coaching Metrics** AI topics explorer Topics report

Coaching metrics ▾ Save view

Date this month ✕ Add filter

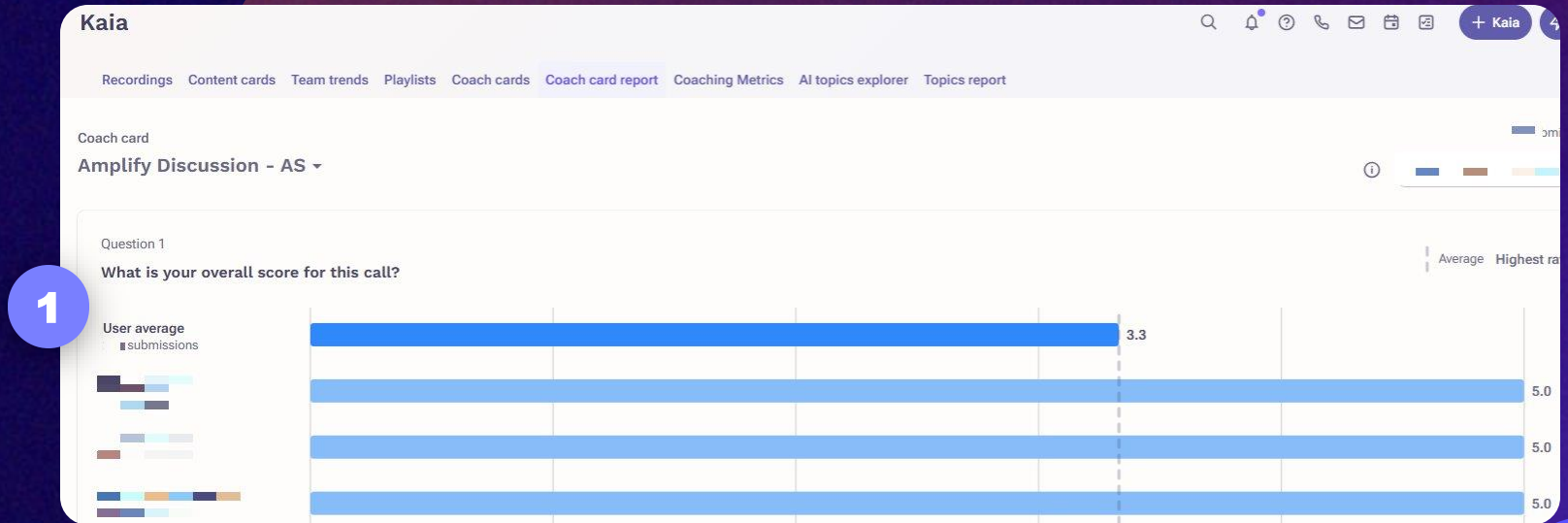
| User ↑                        | Team              | Recording pages viewed ⓘ | Recordings played ⓘ | Coach cards added | Kaia notes added |
|-------------------------------|-------------------|--------------------------|---------------------|-------------------|------------------|
| Outreach<br>Auto-scored by AI | No teams assigned | —                        | —                   | 335               |                  |

1



# Auto Coach Cards

1 Team vs individual performance



# Auto Coach Cards



**Kaia** 🔍 🔔

Recordings Content cards Team trends Playlists Coach cards **Coach card report** Coaching Metrics AI topics explorer Topics report

Question 2  
The rep is able to clearly articulate the value of Outreach Agentic AI, with unique tie ins to the persona / use case.

| Name         | Yes ↓ | No |
|--------------|-------|----|
| User average |       |    |
|              |       |    |
|              |       |    |
|              |       |    |
|              |       |    |

# Auto Coach Cards





# Auto Coach Cards

1 Dive-in to the details

2 Call by call breakdown

Submission details for [redacted]

1 [redacted] this months for "How well did the rep set up for next steps regarding Amplify?"

| Recording    | Overall rating | Submitted by                  | Date ↓     |
|--------------|----------------|-------------------------------|------------|
| [redacted]   | ★★★★☆          | Outreach<br>Auto-scored by AI | [redacted] |
| [redacted]   | ★★☆☆☆          | Outreach<br>Auto-scored by AI | [redacted] |
| 2 [redacted] | ★★★★☆          | Outreach<br>Auto-scored by AI | [redacted] |
| [redacted]   | ★★★★☆          | Outreach<br>Auto-scored by AI | [redacted] |
| [redacted]   | ★★☆☆☆          | Outreach<br>Auto-scored by AI | [redacted] |
| [redacted]   | ★★★★☆          | Outreach<br>Auto-scored by AI | [redacted] |
| [redacted]   | ★★★★☆          | Outreach<br>Auto-scored by AI | [redacted] |



# Questions?

## Auto Coach Cards



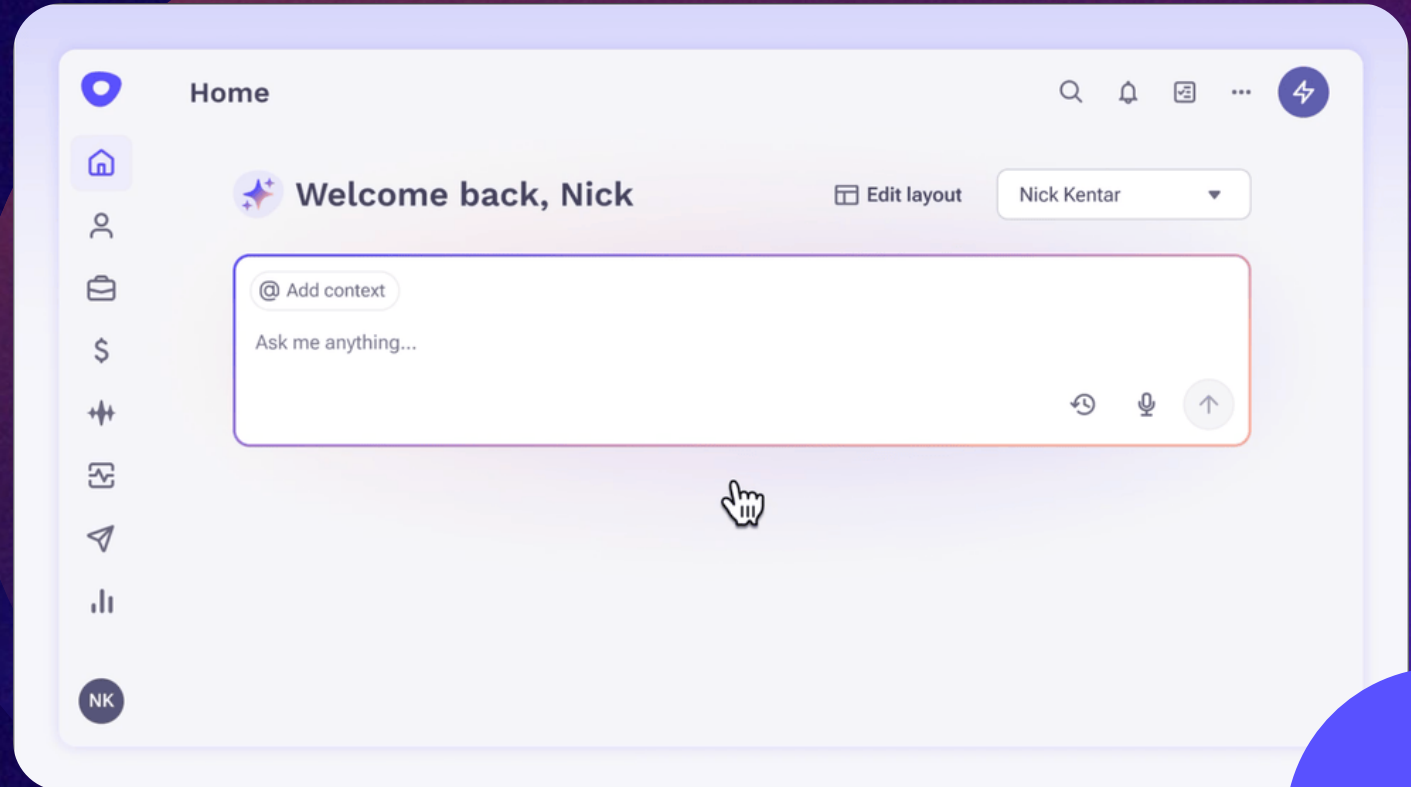
# Outreach Omni

**Ask anything — about accounts, opportunities, prospects, or meetings— and get instant, context-aware answers.**

Turn signals into action by drafting follow-up emails directly from the conversation

Manage multiple conversations at once

Maintain context across interactions with chat history for more relevant, continuous workflows





# Deep Dive

## Outreach Omni



# Outreach Omni

- 1 Ask a question
- 2 Omni reasons across your data set
- 3 Get key insights

🌟 I hold many meetings across a handful of accounts... ▾
✎ □ ×

---

Today

1 I hold many meetings across a handful of accounts to onboard them onto Outreach, usually post-sales but occasionally presales as part of a pilot motion. Identify the accounts I've been engaging with most recently, the key stakeholders and any risks DM

2
💡 Thought for 19s >

Assuming recent engagement is defined as meetings hosted by you in the last 30 days, since you did not specify a timeframe.

3 **Key Insights**

You have been most actively engaging with [redacted] accounts recently, [redacted] Account and [redacted] Account. Your meetings with [redacted] have focused on post-sales onboarding and technical configuration, with key stakeholders including [redacted] [



# Outreach Omni

1 Get recommendations on next best actions

2 Dig deeper with follow ups

|         |  |              |  |  |
|---------|--|--------------|--|--|
| Account | Outreach &  SFDC Configuration (Sandbox)<br>Kaia recording | May 21, 2026 |  | UAT testing dependency; need to disable competing tools; manual user mapping required        |
| Account | Outreach &  Technical Configuration<br>Kaia recording      | May 21, 2026 |  | Governance setup, opt-out configuration, branded URL setup, SSO decisions                    |
| Account | Outreach &  Kaia recording                                 | May 20, 2026 |  | Sequence management during absences; data hygiene; role identification; email deliverability |
| Account | Outreach &  Project Sync<br>Kaia recording                 | May 19, 2026 |  | User adoption; readiness for next phase; need for champion users                             |

**1 Recommendations**

- For Account, prioritize legal and privacy team coordination to unblock production setup. Communicate realistic pilot timelines and manage expectations around launch dates.
- For Account, focus on driving user adoption through internal champions and targeted training. Address data hygiene and role identification to improve workflow efficiency.

**2** Would you like a deeper analysis of risks or blockers for a specific account?

Add context

Reply...



# Outreach Omni

## 1 Product and audience specific insights

### 1 Key Insights: Maximizing Value from Kaia Auto Coach Cards & AI Topic Explorer

Assuming your audience at Unleash consists of revenue leaders and operators seeking practical ways to drive team performance, the most valuable content will focus on how Kaia's AI-driven features directly impact seller productivity, coaching effectiveness, and deal execution. Customers will benefit most from hearing:

- **How Kaia Auto Coach Cards deliver real-time, actionable feedback** during calls and meetings, helping reps improve objection handling, discovery, and next-step clarity without waiting for post-call reviews.
- **How AI Topic Explorer surfaces trends and best practices** across thousands of conversations, enabling managers to identify coaching opportunities, replicate winning behaviors, and spot emerging risks or competitive threats.
- **Concrete customer outcomes:** Share examples of teams saving hours per week, improving win rates, and accelerating ramp time by leveraging these AI tools.
- **Practical workflows:** Demonstrate how to use Kaia to prepare for meetings, review key moments, and drive continuous improvement at scale.

Below are specific value points and supporting evidence you can highlight.

| Feature          | Customer Value  | Supporting Evidence  |
|------------------|---|--|
| Auto Coach Cards | Real-time coaching on calls—improves objection handling, discovery, and next steps. | Teams using AI agents save 4–7 hours/week by automating routine work and surfacing insights. |





# Questions?

Omni



# Blueprint for Success

# Blueprint for Success



## 01 Sales leadership using Outreach

- Forecasting
- Reporting
- Sales input into Content

## 02 Well defined sales process

- Prospect end to end journey mapped
- Follow-Up Sequences
- Meeting Types
- Spreadsheets

## 03 AI – time to value

- Kaia Auto Coach Cards
- Meeting Recaps
- Deal Agent

## 04 Change management

# Meet us at the Genius Bar

Located in the Hub

- Bring your Outreach questions or get a demo
- Connect with our Professional Services Team
- All day June 2<sup>nd</sup> and June 3<sup>rd</sup>

## Registration + Hub

June 2, 2026 8:00 AM-5:00 PM MT

## Hospitality Desk + Hub

June 3, 2026 8:00 AM-3:00 PM MT

2020



 Outreach Presents

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**THANK  
YOU ♥**

