



The Outbound Sweet Spot:

Orchestrating Automation
and Human Touch

Drop where you're calling in from in the chat!



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Agenda

- 01** The human capacity gap
- 02** The scalability and personalization trade-off
- 03** The outbound quarterback model
- 04** Designing your outbound system
- 05** A real example in action
- 06** Q&A

Understanding the human capacity gap

Human effort is not easily replicated

- Deep account research
- Personal, nuanced outreach
- Building relationship context
- Complex judgment calls

The Constraint:

Human bandwidth doesn't scale

- Trade-off between depth & volume
- Stuck on non-value-add activities
- Can only reach finite number of accounts

The human capacity equation

Human capacity in outbound can be defined through simple math

Human Coverage = Reps X Accounts per rep

**Accounts
in TAM - Human Coverage = The Human
Capacity Gap**

How to calculate your coverage

The human capacity equation in practice

$$\begin{array}{ccccc} 4000 & = & 8 & \times & 500 \\ \text{Accounts covered} & & \text{Reps} & & \text{Accounts covered per month} \end{array}$$

$$\begin{array}{ccccc} 10,000 & - & 4000 & = & 6000 \\ \text{Accounts in TAM} & & \text{Accounts covered} & & \text{Accounts never touched} \end{array}$$

Accounts never touched → Opportunities missed → Revenue left on the table

Automation exists to close the bandwidth gap.

How to balance scale & personalization

Focusing humans & automation where they work best

Human Sellers

High-Leverage Work

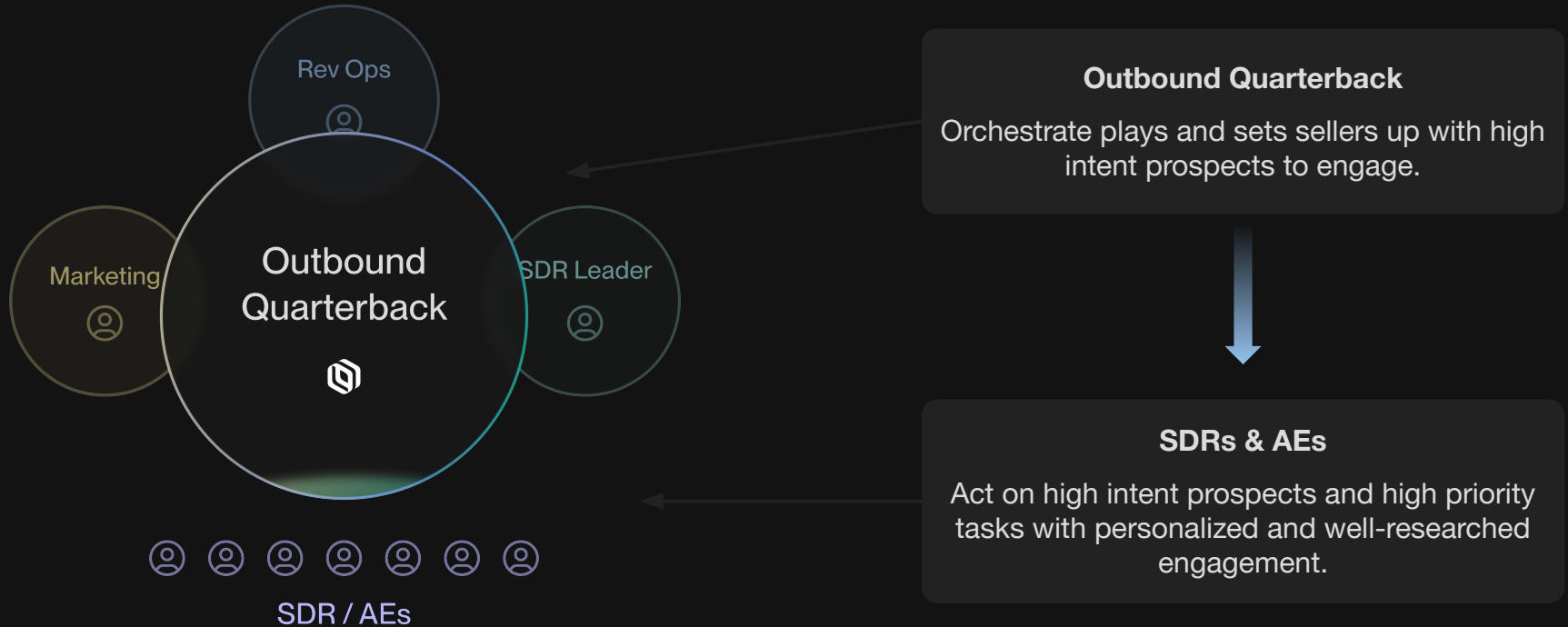
Automation

High-Coverage Work

Outbound Orchestration

An outbound system that routes every account to the right motion automatically.

Outbound Quarterbacks orchestrate, sellers engage



Who acts on what

How Unify defines outbound Rules of Engagement

Category	Rep-owned Accounts	Automated Coverage (AOB)	Lifecycle Recovery
Owner	AE + NBR	Automated outbound	Inbound NBR
Accounts Covered	AE: ~200 accounts NBR: ~500 accounts ENT: 200 shared (POD)	Broad ICP accounts outside rep portfolios	Closed lost, no shows, demo visitors, form fill drop-offs
Purpose	Strategic account penetration through human-led outreach	Expand TAM coverage beyond human bandwidth	Recover opportunities and re-engage accounts showing signals
Key Rules	Automation blocked on assigned portfolios	Automation runs scaled prospecting and outbound	Closed lost ≤ 6 months $\rightarrow$ original AE + NBR Closed lost > 6 months $\rightarrow$ inbound NBR recovery

How to orchestrate outbound

Designing Your Outbound System

01

Define Your Market

02

Tier Your Accounts

03

Understand Capacity

04

Define Your Rules of Engagement

05

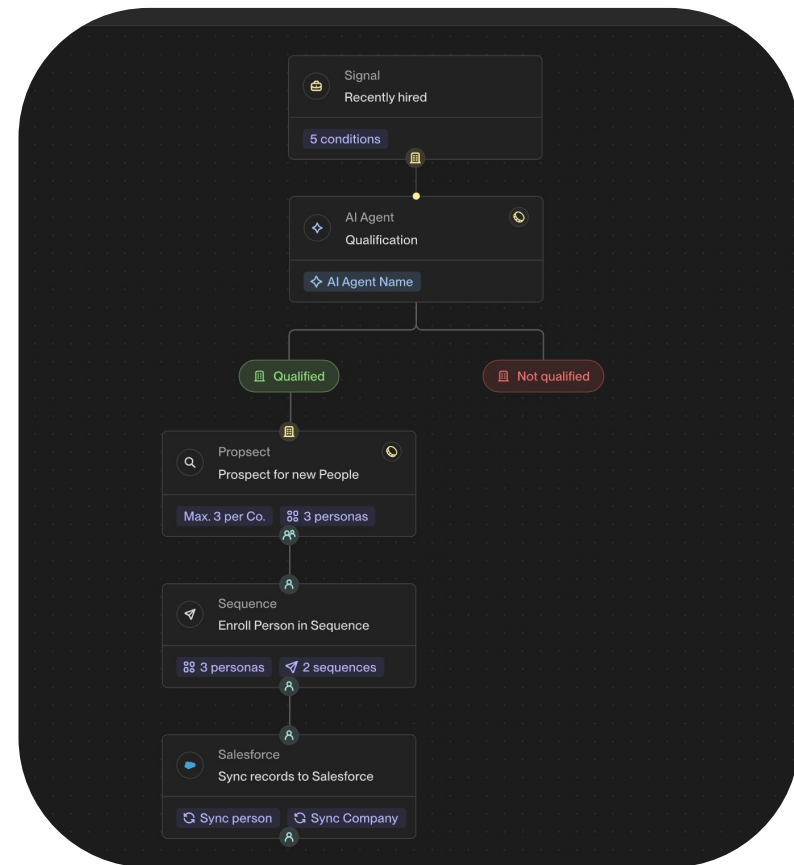
Orchestrate the System

06

Create a Feedback Loop

See it live!

How Unify orchestrates outbound



Get started with outbound orchestration

Your Next 30 Days



Define where humans matter most

Identify the segments & accounts that deserve rep owned outreach



Define your rules of engagement

Establish & codify your ROE for automated & sales-led outbound.



Orchestrate your outbound system

Create a play that routes accounts based on signals



Measure what actually creates pipeline

Track performance across the motions & tweak to optimize