

The Power of Custom AI Signals:

Go beyond generic intent to drive
hyper-relevant outbound



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

Agenda

- 01** Why generic intent isn't enough
- 02** How to identify & operationalize custom AI signals
- 03** Live walkthrough
- 04** Q&A

Custom Signals: Unify's secret sauce for outbound pipeline

Re: Hammad - recent content pieces

Priority **Urgent** Assigned to A

Hammad Shafiq
to Austin Hughes ▾

Loved the email Austin. Let's Talk.

Re: congrats on the launch!

Priority **Urgent** Assigned to Courtney Dye

Max Crawford
to Courtney Dye ▾

Hey Courtney,

Would love to connect. Impressive personalization in these flows. Chatting with the team internally around scheduling since a couple of us are interested. Will be in touch soon.

Hi Sam,

Have to say that is probably one of the better cold call emails I have gotten.

Positive **Willing to meet** De

27

meetings booked last month
from custom AI Signals

Generic Intent

Category-level buying interest inferred from a mix of your own engagement data and third-party research activity.

First Party

Website Intent	Product Usage	Email Engagement	CRM Data
Gated Content	Event Attendance	Meeting Forms	

Third Party

Social Signals	Job Openings	Review Sites	News
Funding Data	Job Changes	Contact Data	Search Analytics

Custom Signals

Business-specific triggers tailored to your ICP that turn raw intent data into timely, actionable buying insight.

Expanding to EMEA	Launched PLG Product	New Controller job posting
Company mentions AI initiatives	Earnings report revenue miss	SOC II audit prep

7 Step Framework

How to build & scale custom AI signals

From Signal to Scaled Outbound

7 step framework to build & scale custom AI signals

Go from signal to scaled outbound

01

Define your ICP

Clarify who you win with and what matters most to them.

02

Identify Key Signals

Find urgency triggers that indicate real buying potential.

03

Spec your Experiment

Build your plan of attack with clear hypotheses and success metrics.

04

Build your Agent

Structure the signal with precise definitions and data sources.

05

Automate Personalization

Personalize at scale using signal context in every touchpoint.

06

Weave into a Play

Operationalize it by creating dedicated plays for each signal type.

07

Monitor Performance

Double down on winners and optimize underperformers based on data.

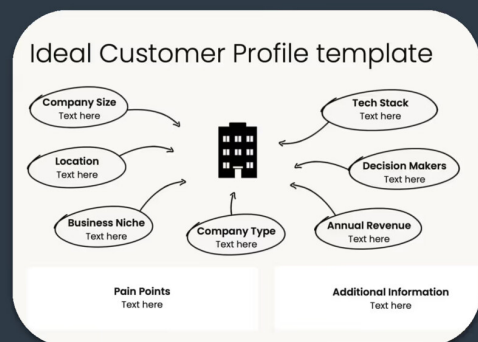
Step 1: Define your ICP

Clarify who you target and what matters most to them.

How to do this:

- Identify your highest-converting customer segments & key characteristics
- Define the core problem you solve for them
- Clarify the key personas for your evaluations
- Align on value props tied to measurable outcomes

Pro Tip: If you can segment your ICP into smaller profiles (ex MM vs ENT, tech vs non-tech), this will make it easier to be even more customized across GTM.



Step 3: Spec Your Experiment

Clarify who you target and what matters most to them.

How to do this:

- Choose a signal to test
- Define a hypothesis (e.g., expected meetings)
- Test on 100 accounts first
- Estimate volume before scaling

Pro Tip: Treat signals like experiments, not assumptions

Product Launch Infinity Signal Edited Oct 25

Hypothesis
Detecting new product launches in real time will help us reach GTM teams when interest and activity are highest.
By running this signal weekly across 17,000 qualified companies, we expect to consistently surface high-intent accounts and drive around 5 growth SOs per month.

Impact Score
5 growth plan sOs

Estimated Effort
.5 days

Spec

- Set up seed criteria for infinity signal
 - Manually sift through 15-20 accounts to get a sense of hit rate (how many have released product in past week)
 - about 1 out of 20 had recent major product launch
- Base filters: (about 17k)
 - Employee count 10-1000
 - Founded after 2010
 - B2B or Hybrid
 - ICP Fit: Not tagged as "Unqualified"
 - Web Traffic > 4000

Step 4: Build your agent

Turn the signal into a repeatable machine.

How to do this:

- Define the exact event
- Constrain your sources
- Set inclusion criteria
- Structure the output

Example:

Event: Detect a net-new product announcement in the last 30 days.

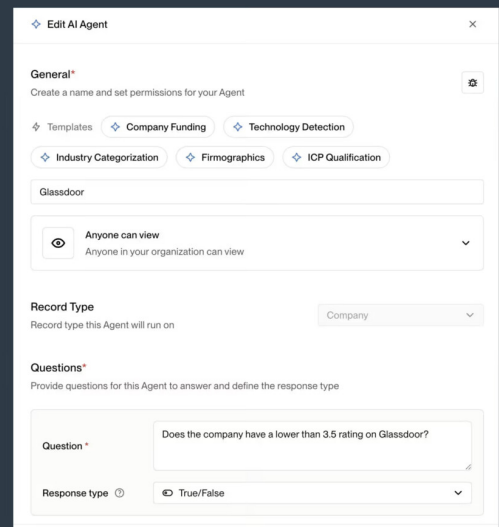
Sources: Official blog and press releases only.

Include: Net-new product; Major feature release

Exclude: Minor update, Pricing change, Marketplace listing

Output Format: Structured summary including product name, announcement date, and source link.

Pro Tip: The tighter the definition, the cleaner the signal.



Edit AI Agent

General*
Create a name and set permissions for your Agent

Templates: Company Funding, Technology Detection

Industry Categorization, Firmographics, ICP Qualification

Glassdoor

Anyone can view
Anyone in your organization can view

Record Type
Record type this Agent will run on: Company

Questions*
Provide questions for this Agent to answer and define the response type

Question: Does the company have a lower than 3.5 rating on Glassdoor?

Response type: True/False

Step 5: Automate personalization

Weave signal context into relevant outreach at scale.



The screenshot displays the Unify interface for configuring an automatic email. It is divided into two main sections: a prompt configuration window and an email preview window.

Prompt Configuration Window:

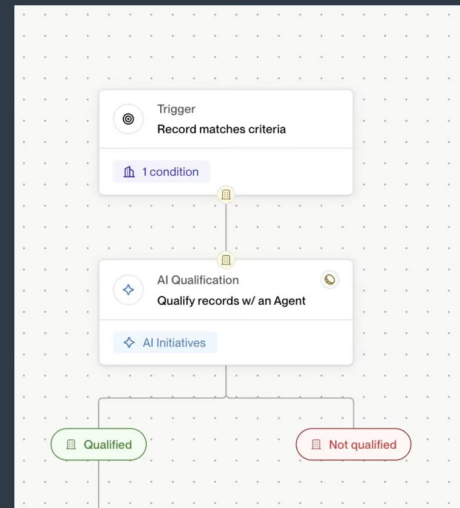
- Prompt:** Write a prompt for your snippet, including the variables you want to use within the prompt.
- Use Agent responses as variables:** A toggle switch is turned on. Below it, text reads: "Enable the use of Agent responses in your prompt to boost personalizations."
- Quick prompts:** A row of buttons includes "Value Prop - Similar Teams", "Work History Icebreaker", and "Agent Research".
- Instructions:** "Write a sentence based on a datapoint which is a company's latest event, congratulating them on hosting that event. Keep it casual and make sure to shorten the event title to remove words that aren't actually part of the title."
- Data:** "Here is the data to use: Recently Hosted Event: [Account] | Past Event"
- Examples:** "Here are a few examples: 1. Saw you recently hosted the sales intelligence event, Marcon 2024. 2. Congrats on the great attendance for your recent marketing automation webinar, Sticker Conference."
- Buttons:** "Generate examples" and a close "X" button.

Automatic Email Preview Window:

- Title:** "Automatic email" with a subtext "Send an automatic email".
- Actions:** "New thread" and "Reply".
- Subject:** "congrats on the launch" with a "()" icon and "Cc: Bcc:" labels.
- Body:**
 - Links: "Syntax @hey(H)", "Product Launch Infinity Sig..."
 - Text: "Guessing that means more eyes on the site and interest picking up. Unify helps teams act on that interest. It pulls in signals like site visits, track events, job changes, and social activity, then qualifies the right accounts so reps can launch outreach directly from the platform. Teams like Perplexity and Flock Safety run it fully automated or with reps in the loop, turning early buzz into real conversations."
 - Link: "CTA Random"
- Footer:** A rich text editor toolbar with icons for bold, italic, link, and other formatting options.

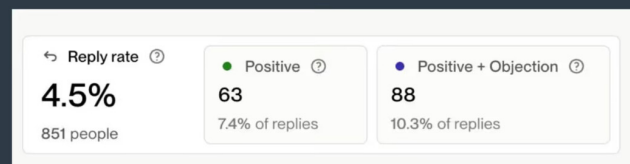
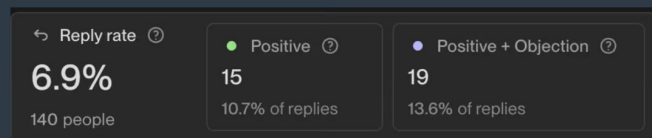
Step 6: Weave into a Play

Select triggers that indicate real buying potential.



Step 7: Monitor performance

Measure results and refine based on what converts.



See it live!

Custom Signal Examples

Agents

- ◆ AI Initiatives (Webinar)
Created by Ethan Dursht on 2/18/26 · Last modified 2/18/26
- ◆ Geographic Expansion (Webinar)
Created by Ethan Dursht on 2/18/26 · Last modified 2/18/26
- ◆ Recent News Mention (Webinar)
Created by Ethan Dursht on 2/18/26 · Last modified 2/18/26
- ◆ Integration/Compliance Page Updates Agent (Webinar)
Created by Ethan Dursht on 2/18/26 · Last modified 2/18/26
- ◆ Customer Case Study (Webinar)
Created by Ethan Dursht on 2/18/26 · Last modified 2/18/26
- ◆ Product Launch Infinity Signal Webinar
Created by Ethan Dursht on 2/18/26 · Last modified 2/18/26

Get started with custom signals

Your Next 30 Days



Audit your ICP

Review your highest-converting segments and validate value props



Identify 3 triggers

Define business-specific signals that indicate buying readiness



Launch one play

Build and deploy a dedicated signal-driven campaign



Measure results

Track positive replies by signal and optimize based on data

Q&A

What can we answer?



Unify customer?
Start building now!



Not a customer?
Book a demo!

Thank you!

Gift from us to you!

Comment **Agent** in the chat and we'll follow-up with a custom agent prompt built for your business.