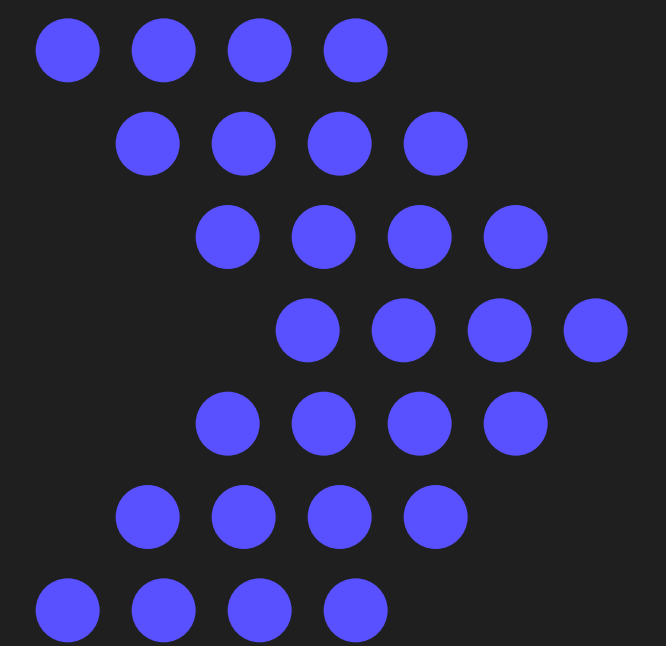
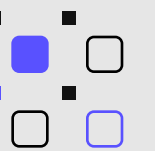


AI-powered selling:  
The ultimate guide  
for sales leaders.



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Introduction:


# Manny Medina

CEO, Outreach

As CEO of Outreach, I've spent a lot of time with sales leaders across multiple industries. During that time, I've noticed successful sales leaders have one important thing in common: They operate with a mindset of abundance. That doesn't mean hitting every revenue target comes easily. On the contrary, it means that they choose to see opportunities in every challenge, instead of obstacles.







# Advancements in generative AI present new opportunities for sales leaders and their teams.

In particular, AI-powered selling supports sellers in the right moment, so they can amplify their productivity and focus on strategic work.

The future of AI in sales is full of possibilities, but also unknowns.



Will AI capabilities replace the need for salespeople? No.

- There is no future in which all sales organizations will be completely run by artificial intelligence without people.
- Many people fear sellers may lose their jobs to AI. But in reality sales professionals could lose out to other sales professionals using AI.



Sellers who use AI will replace sellers who don't.

When you pair AI with a real-life salesperson who knows when and how to harness AI's capabilities, the opportunities are abundant.

AI-powered selling gives sellers a boost when they need it most. It also reveals key aspects of deals that reps and leaders need to see to predictably create and close more pipeline.

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## AI-powered selling (noun)

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An artificial intelligence capability within the Outreach platform that equips sellers with the information they need, right when they need it, so they can take the right actions that make the biggest impact. Outreach's AI-powered selling capability is informed by a robust data set of more than **33+ million** weekly interactions from **6,000+** customers. Outreach AI continuously learns and adapts its responses over time to help sales teams create and close more deals in any market.

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## Generative AI (noun)

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Algorithms (such as ChatGPT) that can be used to create new content – including audio, code, images, text, videos,<sup>1</sup> summarizations, and guide or take next steps for you.



Much like the disruptors before AI – including the printing press, the Internet, social media, and the smartphone – it’s not a matter of whether you should adopt AI. It’s a matter of adapting or becoming obsolete.

## The Evolution of Content

1454	The Printing Press	Revolutionized content <b>replication</b> at scale.
1971	The Internet	Revolutionized content <b>transmission</b> at scale.
1997	Social Media	Revolutionized content <b>sharing</b> at scale.
2008	The Smartphone	Revolutionized content <b>consumption</b> at scale.
2022	Chat GPT, Large Language Models	Revolutionized content* <b>synthesis and creation</b> at scale.

\*Content defined as: Emails, code, web sites, slide decks, blogs, tweets, medical opinions, X-ray readings, law briefs, analyst coverage, travelogs, news articles, photos, videos, films, ads, etc.

**Sales leaders, now is the time to leverage AI’s capabilities within your existing workflows.** If you wait, your competitors will pass you by. Fortunately, you can make AI to your competitive advantage now.

Only 57% of salespeople make their annual quotas, according to a CSO Insights survey of nearly 1,000 sales leaders.<sup>2</sup> That’s in part because sales teams are facing new challenges in a turbulent economy. New pipeline is harder to source, deal velocity is slower, and conversion rates are lower.

As a result, pipeline coverage is thinner, sales rep participation is lower, and surprise forecast misses are commonplace. But with AI-powered selling, these sales challenges don’t have to be the norm.

AI-powered selling allows your sales team to increase seller productivity and remove barriers to driving revenue to help catapult you ahead of competitors who don’t embrace AI.

# How AI helps your entire sales org operate with greater efficiency.

## Sellers

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AI can handle the time-consuming administrative tasks that have historically bogged them down. Here are a few examples:

- Generative AI helps accelerate email follow-ups by writing email drafts, shifting reps' roles from author to editor.
- AI equips reps with insights into buyer sentiment, engagement, and reactions that might otherwise go unnoticed, as well as collect signals from a range of other sources and surface them when needed.
- AI processes unimaginable volumes of inputs and information quickly, so humans can take action and make an impact faster with AI, than without.

These are just a few of many examples of how AI frees up time for reps, so they can spend time on the more important strategic actions that predictably move deals through the sales cycle, so they can **create and close more deals**.

## Sales leaders

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In addition to boosting their team's productivity, sales leaders can use AI to spot and save at-risk deals – before it's too late. To understand deal health, sales leaders are often trying to read between the lines of inputs sellers share directly with them. It shouldn't take hours of work just to get basic visibility.

For example, think about every time a rep gets 'happy ears' and only shares the positives, instead of risks. With AI, leaders gain an aggregate view of deal insights so they can get an objective, clear, and realistic view of how deals are progressing across the entire sales cycle – so you know when deals are on track and when to intervene.

## Revenue operations

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AI surfaces market trends and fluctuations for RevOps leaders, so they can understand and stay ahead of all possible outcomes. For example, if there is an economic, resource-based, or competitive change affecting the business – RevOps teams can use AI to look forward to make immediate changes to prevent or reduce negative impacts.

Using AI, RevOps can pull the right levers and pivot their plan in time to drive more profitable outcomes despite change.



“

Most sales leaders see the opportunity in utilizing new sales technologies, too. In a recent Outreach sales confidence survey, 84% of sales leaders in the U.S. and the U.K. said they expect a slight or significant revenue increase from the previous quarter. Of those who expected an increase, "introduction of new offering" and "Introduction of new sales technologies" were the top two reasons for their optimistic outlook.

In this ebook, four Outreach executives and I will help you see the power of AI for sales leaders, too.



Manny Medina  
CEO, Outreach





# What the rise of AI means for your go-to-market strategy.

David Ruggiero, President, Go-to-Market at Outreach

Some of the most challenging aspects of developing an effective go-to-market strategy are predicting outcomes, understanding which levers drive better results, and adapting initiatives quickly enough to accommodate real-time market changes.

In 2020, change was impossible to ignore. Let's look to B2C companies as a bellwether, as they are typically ahead of B2B in adopting new strategies and technology.

For example, when much of the world stayed home instead of shopping in stores, businesses had to adjust or shut down. Many stores pivoted to offering curbside pickup so that customers could avoid shopping inside a crowded store.

Today, stores still use curbside pickup because sales numbers show that customers want it.

In fact, "click-and-collect" (i.e. buying online and picking up in-store or curbside) increased from 6% of all U.S. ecommerce sales in 2019 to 11% in 2022.<sup>3</sup>

Why are some brands able to make successful real-time shifts that help drive more profitable outcomes, while others seem to catch on a little too late?

One possible difference may lie in a company's ability to use AI models to predict outcomes.

By analyzing historic customer behavior data for curbside pickup, for example, you might be able to predict customer response to a new offering, like curbside returns.

You may also be able to use AI to predict customer churn and contraction, allowing you to take proactive actions to save that business.<sup>4</sup> Likewise, you can use AI to glean insights from real-time market fluctuations or current events to quickly adjust your marketing and sales strategy.

Using AI, you don't have to wait until you've lost business to reflect back on what went wrong.

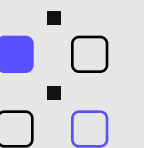
You can see small shifts sooner, adapt your go-to-market strategy accordingly, and gain a competitive advantage.



## Turn vision into action:

Read this Harvard Business Review article:

[Using AI to Adjust Your Marketing and Sales in a Volatile World](#)



# Debunking AI myths: A sales leader's perspective.

As written and explained by an AI chatbot.

## Misconceptions about AI

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### 01 AI replaces salespeople

AI is a tool that assists salespeople; it doesn't replace them. It can automate routine tasks, but the human touch is essential for relationship building and negotiation.

### 02 AI is always right

While AI can process and analyze data at incredible speeds, its output depends on the quality and accuracy of the data input. Garbage in, garbage out.

### 03 AI is impersonal

On the contrary, AI can be used to personalize customer interactions, tailoring communications to individual needs and preferences based on data analysis.

### 04 AI is too complex to implement

Yes, AI can be complex, but many user-friendly tools and software make it accessible even for people without a tech background. Moreover, many companies offer support during the implementation process.

### 05 AI is only for big businesses

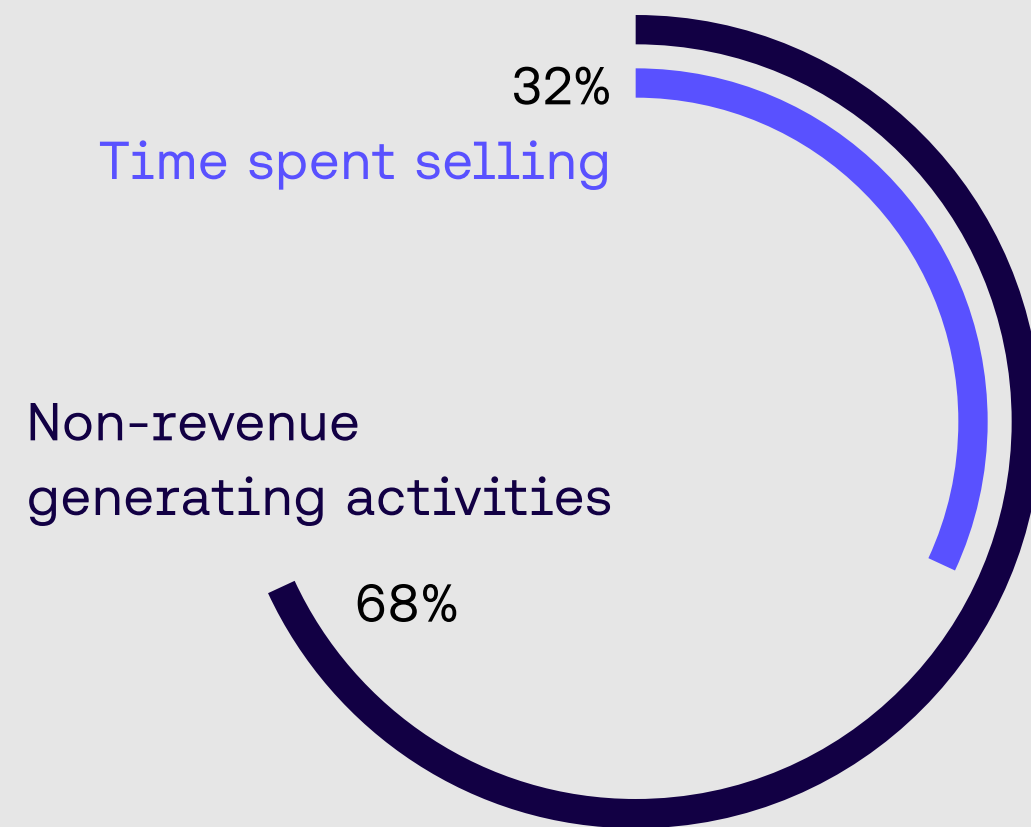
AI isn't reserved for large corporations. Many AI tools are free and scalable, making them useful for businesses of all sizes.

Remember, AI is a tool used to augment sales strategies, not a magic wand. Its effectiveness largely depends on strategic implementation and the quality of the data supplied.



# How generative AI unlocks seller productivity.

Kevin Bognar, SVP, Enterprise Sales



On average, salespeople only spend 32% of their time selling, according to the 2022 Sales Mastery survey.<sup>5</sup> The other 68%? That's spent on non-revenue generating activities, such as manual CRM updates that sales managers use to piece together a fuzzy picture of their deal health.

The majority of sellers may use their CRM daily, but that doesn't mean they like it. In fact, one study revealed that **sellers would rather clean the bathroom than update the CRM.**<sup>5</sup> And I don't think that's because they really enjoy cleaning.

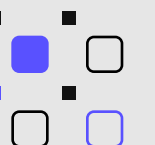
Highly manual processes **decrease seller productivity and hurt win rates.** They take the seller away from the one activity that directly contributes to their commission – selling.

Using AI, sellers can offload manual, time-consuming tasks that prevent them from focusing on strategic selling activities.

For instance, how much time have we all spent staring at a flashing cursor when drafting an email? **Generative AI allows every rep to transition from being an author to an editor.** With generative AI, sellers are free to focus on the strategic and human aspects of selling, like personalization. AI also frees reps to focus on other recurring tasks, like developing proposals. This prevents untimely delays and keeps deals on track to close.

Sales leaders and sellers can both use AI-driven deal health insights that automatically score deals based on activity data. With AI-powered deal health analysis, teams can clearly see which deals they need to focus on and how they can course-correct with recommended actions that guide them to success.

Other activities – like taking meeting notes or compiling post-call action items – can be completely automated. During those same calls, AI can populate real-time responses to prospect questions that only the seller can see. This allows sellers – including new hires – to answer questions accurately in the moment, boosting buyer and customer confidence.





AI helps sales teams better engage with buyers and customers in other ways, too.

Maybe you're launching an email initiative to try to re-engage prospective customers you haven't heard from in awhile. You can use AI to assess customers' responses to that initiative, based on the meaning behind their words (i.e. sentiment).

Were the majority of the responses classified as positive, sales objections, referrals, or did they unsubscribe?

For instance, AI can analyze context clues from emails and meetings to alert you to an uptick in your percentage of objection responses. One common objection might be: "We are swamped right now. I will contact you next week." Without AI, this trend in objections might go unnoticed, leaving your team in the dark, or worse, leading to end-of-quarter scrambles and missed revenue targets.

But with this insight from AI, you can proactively help your team handle objections and ultimately take the right action to turn objections into positive outcomes.

Better case—were the responses largely positive?

Using AI to quickly understand positive response rates, you can empower your team to dig deeper and learn why that tactic and message were received so well. From there, you can scale what's working across the team so it can become part of a winning workflow that helps your team get sidetracked deals back on track.

AI is the live, digital assistant that sellers and managers will come to rely on (if they don't already) to remove menial tasks so they can focus on more complex ones.

Plus, AI is more fun than cleaning the bathroom – and we think most sellers will agree.

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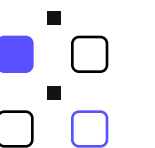
## Customer sentiment (noun)

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The overall attitude or feeling that customers have toward a particular product, service, interaction, or brand, often determined through the analysis of customer feedback, reviews, and social media posts. It can be quantified through sentiment analysis, a type of AI technology, that determines whether the sentiment is positive, negative, or neutral.

### **Turn vision into action:**

Watch this Outreach webinar: [How live AI will unlock sales productivity](#)



# AI decoded: A sales leader's guide.

As written and explained by an AI chatbot.

## What AI is

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- **Adaptive learning:** AI systems can learn and adapt from experience, improving their performance over time. This can lead to more efficient sales forecasting and lead scoring.
- **Data analysis:** AI can analyze vast amounts of data quickly and accurately, providing insights that can inform sales strategies and improve decision-making.
- **Automation:** AI can automate routine tasks, such as data entry or scheduling, freeing up sales teams to focus on more complex tasks.
- **Personalization:** AI can help personalize customer interactions based on data, leading to better customer experiences and potentially higher sales conversion rates.
- **Aggregate information:** AI tools allow teams to glean consumable insights from a large volume of information, helping sales teams quickly spot trends, gain insights, and save time analyzing data.

## What AI is not

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- **A replacement for human interaction:** While AI can automate tasks and provide insights, it cannot replace the need for human relationships in sales. Human interaction is still key in building trust and understanding customer needs.
- **Always perfect:** AI systems are only as good as the data they are trained on. If the data is biased or incomplete, the AI's results will also be flawed.
- **Automatically secure:** Not every AI tool is built to protect your organization's sensitive information. This is especially important to consider with the range of free, publicly available AI tools available today.
- **Built to understand every nuance:** Most AI tools are excellent at ingesting and processing larger volumes of information. However, when it comes to seller-specific scenarios, there may be gaps in AI's knowledge, especially if that AI is a generic, publicly available model.
- **A one-size-fits-all solution:** AI tools need to be tailored to your specific sales processes and goals. What works for one organization may not necessarily work for another.
- **A magic solution:** AI can provide valuable tools and insights, but it's not a magic solution that will automatically solve all sales challenges. It's a tool that should be part of a broader sales strategy.



# The real value of generative AI.

Melissa Fisher, Chief Financial Officer

In today's environment, CFOs are becoming more influential stakeholders than budget management or procurement teams in the purchasing process. We're driving growth and profitability, identifying financial risk, and building digital competency across accounting, budget, HR, and audit functions.

To achieve those goals, we have to ensure company money is spent wisely. That's why we're also playing a larger role in expense approvals. When we're assessing expenses, we're asking ourselves, "Will the value be realized from the spend?"

We have all been burned by software that went unused.

As a result, we care about adoption a lot.

Technology is only useful if you **use** it. Every expense has to have data to prove it will provide ROI back to our org.

AI is one of those investments that has the potential for great return, particularly by improving data analysis, automating processes, and speeding up decision making.

Among sales organizations who use it, 41% have already observed major improvements in their use of sales reps' time and forecasting accuracy, according to Salesforce's "State of Sales."<sup>6</sup>

Forecasting becomes less manual, more frequent, and increasingly accurate.

Organizations using AI

41% Organizations observing major improvements in their use of sales reps' time and forecasting accuracy



Leaders can commit their numbers with confidence and pivot their plan when real-time market fluctuations occur.

Executive leadership gains trust in the projections, allowing them to confidently invest money back into the business through talent and technology.

However, adoption is still happening at a slower rate, with only one-third of sales organizations saying they use AI technology.<sup>6</sup>

How can you avoid adoption pitfalls? Avoid investing in a disparate AI tool that your team has to adopt in the first place.

A platform with built-in AI capabilities that span the full sales cycle delivers more value at a lower cost of ownership. Choose a complete system where your team can do all of their work – with AI working in the background to help them do it faster.

When you look at AI as part of a complete system vs. a disparate tool, the efficiency gains can also be realized in weeks – not several months or years.

A HubSpot survey underscored the potential financial impact.

In fact, 61% of sales teams that exceeded their revenue goals used automation in their sales process.<sup>7</sup>

**These results show that AI isn't a passing trend.**

It has the ability to boost profitability in a way you can tangibly count in dollars and cents.

Organizations that already use AI as part of their marketing and sales automation strategy will continue to reap financial rewards.

Those who show up late to the party or skip it entirely will soon find it impossible to catch up.

 **Turn vision into action:**

Read this Gartner article:

[CFOs: Here Are 4 Actions to Ensure You Implement AI – The Right Way](#)







# The pitfalls of AI and how to avoid them.

Prasad Raje, Chief Product Officer

As chief product officer, I often get asked, “What do you think the future of AI will look like in 2-5 years?” In truth, it’s hard to predict – for me or anyone else.

AI as a technology is rapidly changing. It’s difficult to say what it will look like even one year from now.

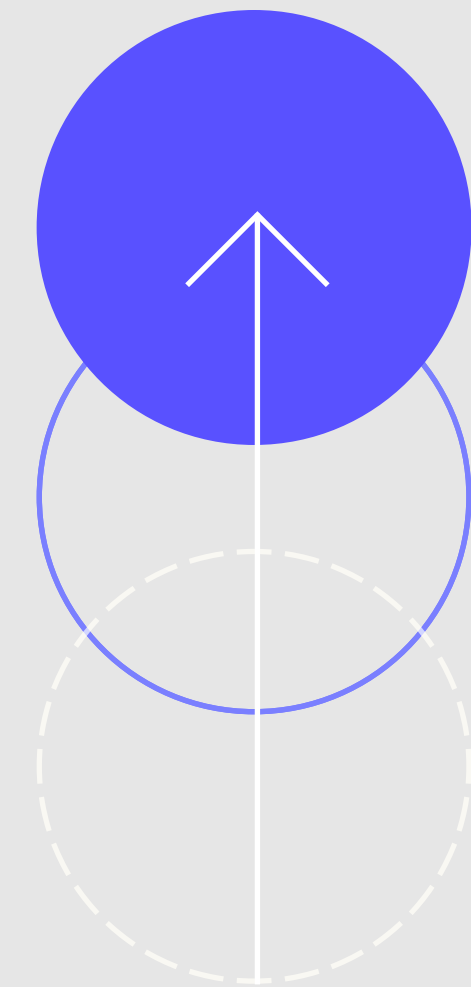
What I can tell you is that – for sales teams to be successful now and in the future – they’ll need AI to be embedded into their sales processes, from creating pipeline to closing pipeline. If sales teams don’t leverage AI, they run the risk of falling behind their competitors who do.

They will also lose out on tremendous efficiency and efficacy improvements throughout their sales motions.

Selling fundamentally occurs in human conversations between a seller and a buyer. AI acts as a helpful assistant in these human interactions. At Outreach, we’ve long known AI will play an increasingly important role in sales, and we built our platform with that in mind.

Over the past six years, Outreach made substantial investments in AI ahead of the market to drive innovation in sales. Our AI journey started with our sentiment analysis in emails several years ago.

Our journey continued with Kaia, our conversational intelligence AI that assists sellers in live calls and meetings. With Generative AI, there is now a quantum leap in the ability of computers to more deeply understand these conversations and to synthesize insights from them. Accordingly, Outreach is actively bringing these new capabilities to our customers to help them improve seller productivity across the entire sales cycle.



## Why specific, non-generic AI matters.

Large Language Models (LLMs) are an exciting new technology, but when used as-is they can produce generic output that is not directly usable in a selling context. This is because the collection of information that these models learn from (called the “training corpus”) is publicly available digital information on the web, in books, and other online repositories. While this corpus is extensive, it is often out-of-date and non-specific. LLMs output is highly dependent on the input in the prompt that is provided to them. Outreach will use the following three areas of information that are already available within Outreach to generate highly specific and relevant output from the LLM:

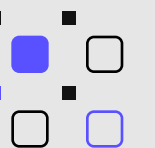
- 01 History-based context:** The specific context of your buyer/seller interactions that have already occurred are essential to generate relevant output. This includes the actual timing and content of emails, meetings, calls, etc.
- 02 Seller-based accuracy:** This includes information like pricing and packaging, competitive comparison, data sheets, content cards, templates and the like. This will ensure accuracy because the correct and freshest information is used.
- 03 Buyer-based specificity:** For each seller in Outreach, each buyer’s specific information like pricing, discounts, specific steps of the mutual action plan, specific account notes, etc. are extremely important. Imagine the response generated if the LLM mixed up one buyer’s 20% discount with another buyer’s 30% discount!

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## Large Language Models (noun)

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Models that are trained by the public corpus of data available (websites and digital content). They have knowledge and training about that content and can synthesize output based on that knowledge and training.



## Outreach is the only AI-powered Sales Execution Platform that unlocks seller productivity.

With Outreach, your sales team can use a single, established platform with AI embedded throughout the sales cycle that delivers insights and guided actions, informed by the richest data set of over 33+ million weekly interactions from 6,000+ customers. With a platform built on the strongest AI foundation, AI analysis can run “behind the scenes,” freeing up your sellers to focus on efficiently and effectively creating and closing more deals.

Outreach is on a journey to deliver the most comprehensive set of AI-infused workflows for sales teams in a single system, from creating pipeline to closing deals. This includes workflows for:

- SDRs/BDRs to prospect with Outreach sequences, triggers, tasks, etc
- AEs to manage their deals with mutual action plans, opportunity editing, live conversation intelligence AI assistance in calls and meetings, and forecast submissions

- AE managers to manage their pipeline, reps, and deals
- Revenue leaders to manage their overall forecast and health of the sales team.

Having all this activity and information in one system results in a comprehensive and complete view of every prospect, account, and deal. Outreach is then able to process this information to deliver deep and complete insights about every deal in its entire life cycle.

33+  
Million

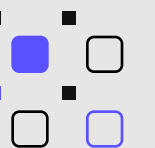
Weekly  
interactions  
from

6,000+

Customers

## Here are some examples of how an AI-powered sales execution platform can assist sales teams across the entire sales cycle:

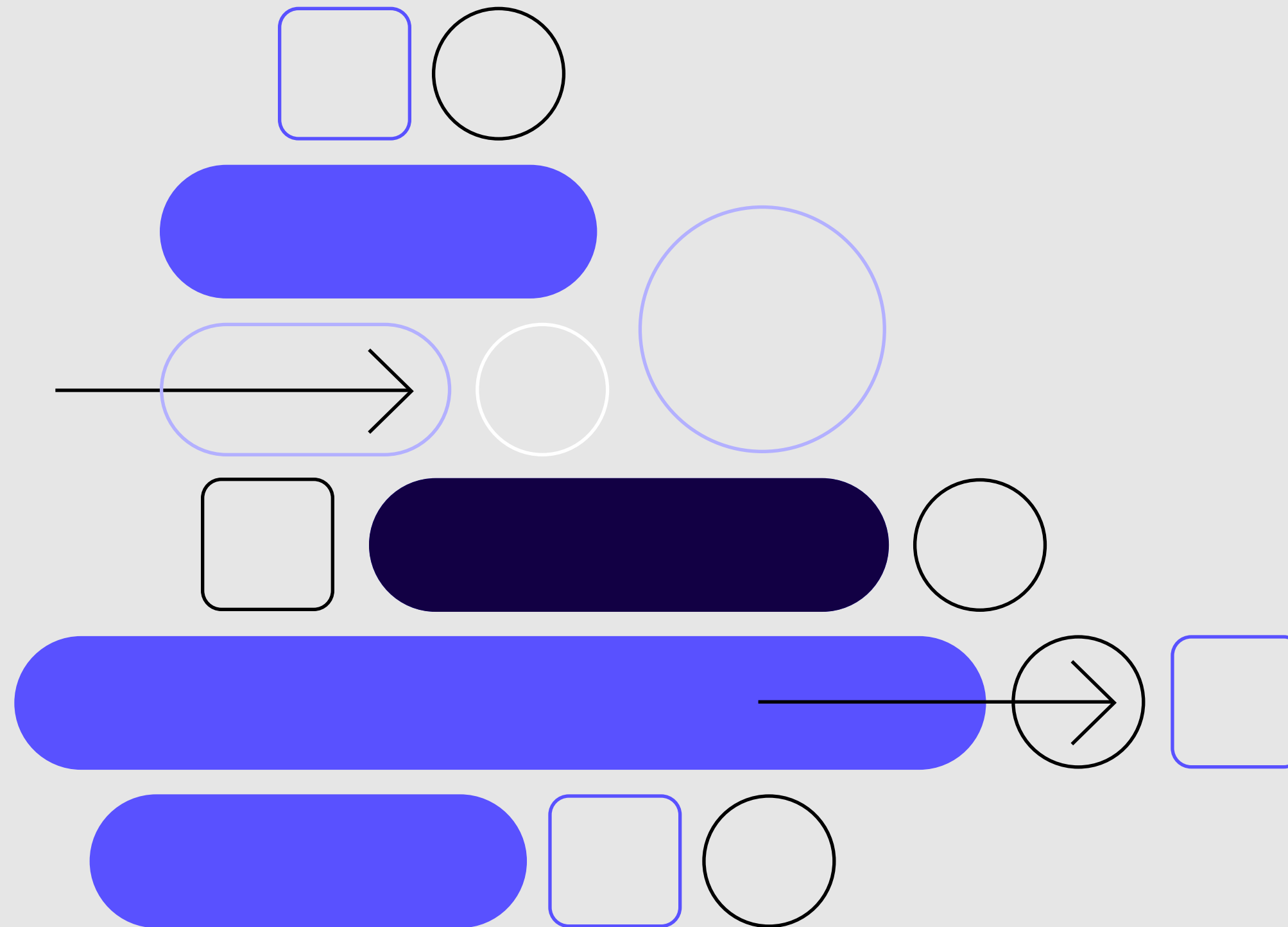
- Auto-generating more accurate and relevant email copy based on the context of past buyer and seller conversation, so reps gain efficiency and buyers get faster and more accurate responsiveness.
- Surfacing a gap in your existing pipeline before it's too late – and get specific actions to close it.
- Extracting information to surface deal insights and make very specific recommendations to the buyer early on in the sales process.
- Helping to increase your prospecting outcomes by dynamically constructing sequence and variations.
- Using AI to go beyond simple quantitative questions, so you can answer more complex, open-ended queries like:
  - “Is this deal really on track to close in Q3?”
  - “Give me the list of opportunities that is larger than \$100k and in the ‘Proposal’ phase of my pipeline that has a Champion and is really expected to close this quarter.”
  - “How likely is it that [X Prospect] will buy our product?”





Of course, AI insights and recommendations are only as good as the data and content you feed them. So if your system is only leveraging a small data set across bits and pieces of the sales cycle, you're missing out on efficiencies, insights, and predictions that a platform with a robust database and customer set can deliver.

AI has been built into the fabric of Outreach's platform for years, while other companies are just starting out. We're the only company that's been in this race for nearly a decade, backed by the largest data set in the sales industry.

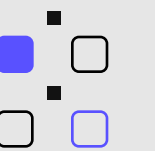


When you use a platform with a massive database and millions of customer interactions at every stage of the sales cycle, you receive deeper, stronger AI recommendations. By investing in an established AI-powered sales execution platform, you can also benefit from the company's years of testing, updating, and advancing their AI capabilities.

With Outreach, you're partnering with the best AI-powered end-to-end sales execution platform in the market.

**▶ Turn vision into action:**

Watch this Outreach webinar: [How live AI will unlock sales productivity](#)





# The future of AI in sales.

Manny Medina, CEO at Outreach

Operating from a mindset of abundance is what separates good leaders from great leaders.

They see the possibilities in everything, while also acknowledging circumstances in front of them.

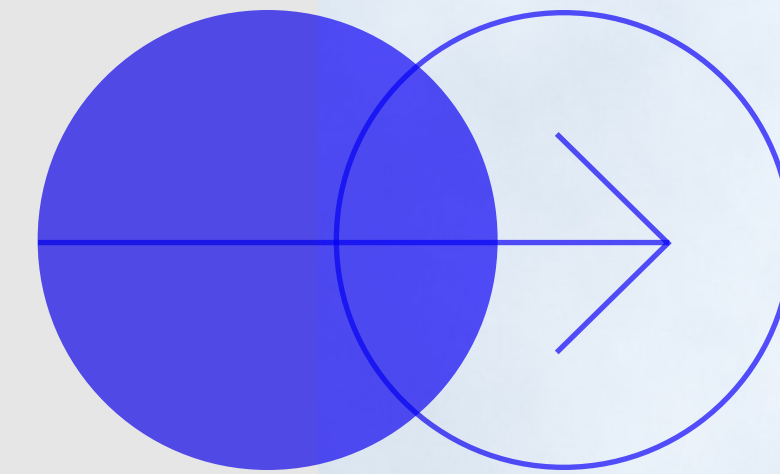
AI is an opportunity to amplify your sales team's impact – if you approach it with the right mindset, deploy the right technology, drive adoption, and see it through to success.

Embracing AI will require change management. To succeed, sales leaders must drive this change – not just RevOps or Enablement.

Ops and Enablement are partners, but it's sales leaders who have the power to ensure adoption, and in turn, drive better outcomes.

Bringing everyone along is critical. Sales leaders should start with early adopters and then move on to help more tenured sellers leverage AI.

Failure to drive AI adoption and lead through this transformation will leave sales teams behind their competitors and the market.



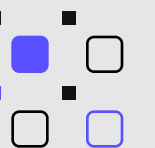


## Outreach is the only AI-powered Sales Execution Platform in the market, empowering your team with the ability to:

- **Gain efficiency without losing quality or the ability to personalize.** Smart Email Assist with Generative AI auto-generates accurate and relevant email copy based on the prior context of conversations between buyers and sellers.
- **Drive pipeline growth with AI-driven metrics and targeted actions.** The Create Pipeline Calculator provides account executives and sales managers with a list of recommended prospecting activities they need to take to fill any pipeline gaps.
- **Improve ongoing pipeline performance.** Outreach's Create and Close Dashboard provides account executives and sales managers with a high-level summary of their forecasted revenue from existing pipeline – highlighting gaps and identifying risks when there is not enough pipeline to achieve quota.
- **Proactively monitor deal health scoring.** Outreach's Deal Health Score helps you understand the status of in-progress deals by providing a relative deal health score. That way, you can clearly see what's working well, where to focus, and suggested actions to get deals back on track. With the power of AI and ML, you can quickly find out how each deal is performing, while also understanding key next steps to improve or close the deal – all in one place.
- **De-risk deals with interactive Deal Insights.** Outreach's generative AI allows AEs and AE managers to answer key questions about any deal. For example, sales teams can easily understand whether a deal has adequate budget. Deal Insights will also provide pre-built answers to questions about a deal's budget, champion, timing, etc. These insights align to the team's existing sales methodology.
- **Leverage buyer sentiment to move deals toward close.** Buyer Topics and Reactions in Kaia allow account executives and sales managers to review recordings of customer meetings and quickly pinpoint the buyer's reaction to 14 of the most relevant sales topics, such as budget, legal, or support.

**AI has always been part of Outreach's DNA.** Now, we've taken our AI capabilities to the next level to help sales teams take AI-powered, guided actions to create and close more deals. With Outreach, the AI opportunities are truly limitless.

[Learn more](#)







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# Why Outreach?

Outreach is the only AI-powered Sales Execution Platform that unlocks seller productivity to help sales teams efficiently create and close more pipeline.

From prospecting to deal management to forecasting, our platform leverages automation and artificial intelligence to help revenue leaders increase the efficiency and effectiveness of all go-to-market activities and personnel across the revenue cycle.

Outreach is the only company to offer sales engagement, conversation intelligence, deal management, forecasting, and more in a unified platform. More than 6,000 companies, including Zoom, Siemens, Okta, DocuSign, and McKesson depend on Outreach to power their revenue organizations. Outreach is a privately held company based in Seattle, Washington, with offices worldwide.

To learn more, please visit [www.outreach.io](http://www.outreach.io).

[Request a demo](#)

Learn more about how the Outreach Sales Execution Platform can help your organization generate more pipeline and win more deals with less effort.





Trusted by over  
6,000+ businesses  
around the globe.

