eTrigue
Agentic AI:
Transforming Customer 360
& B2B GTM for the Next Era

Before we get started…

We respect your time.

We will not run more than 30 minutes.

Questions are encouraged.

Use the “Question” link in the bottom of your screen. We will answer all your questions!

An interactive webinar.

You will be able to participate in live polling. Click your answers on-screen.

A recorded version of this presentation.

We are recording today’s session and will send to everyone within the next few days.

Speakers

Kristin Carey

Vice President, Partner Development

Chad Reese

VP, Digital Marketing and Demand Generation

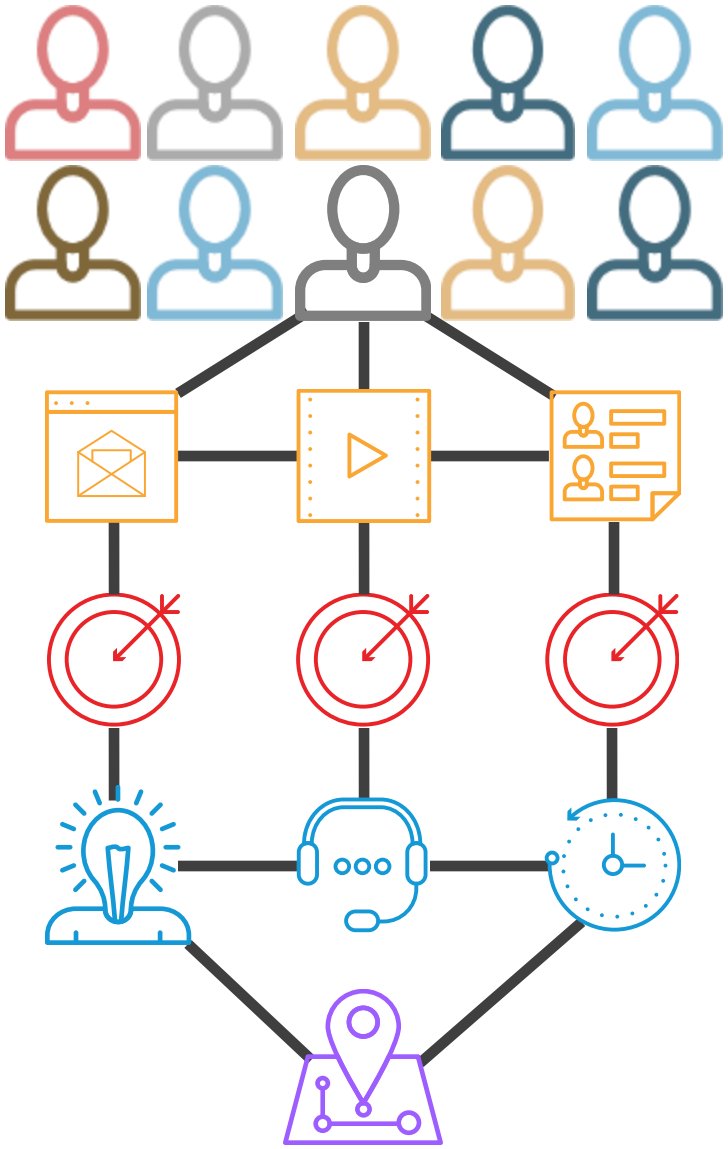
About eTrigue

- "Thru + With" Channel Marketing Programs
- Platform + Services Together
  - ✓ Specialize in Channel
  - ✓ Digital Marketing Program Execution
  - ✓ AI Lead Insights & Sales Performance Tracking
  - ✓ Creative, Content & Execution Team
- Supporting 93 countries, 21 languages
- HQ: San Jose, CA

Clients:

NetApp, paloalto NETWORKS, aws, Red Hat, NUTANIX, NVIDIA, CHECK POINT, Extreme networks, Microsoft, AUTOMATION ANYWHERE Go be great., SAP, Castrol, shopify, FORTINET, Google Cloud

Scaling Partner Marketing with Confidence



Launch new partners in days

Onboarding partner, messaging/ training, target list development

Co-branded emails and Media sent to target accounts/contacts

Prospects Visiting landing pages/InfoCenter and viewing/downloading assets

Lead & Company Insights sent to partner sales reps in real-time

Tracking the responsiveness of each partner sales rep

Coffee with eTrigue

Sip in style and join the eTrigue MUG CLUB

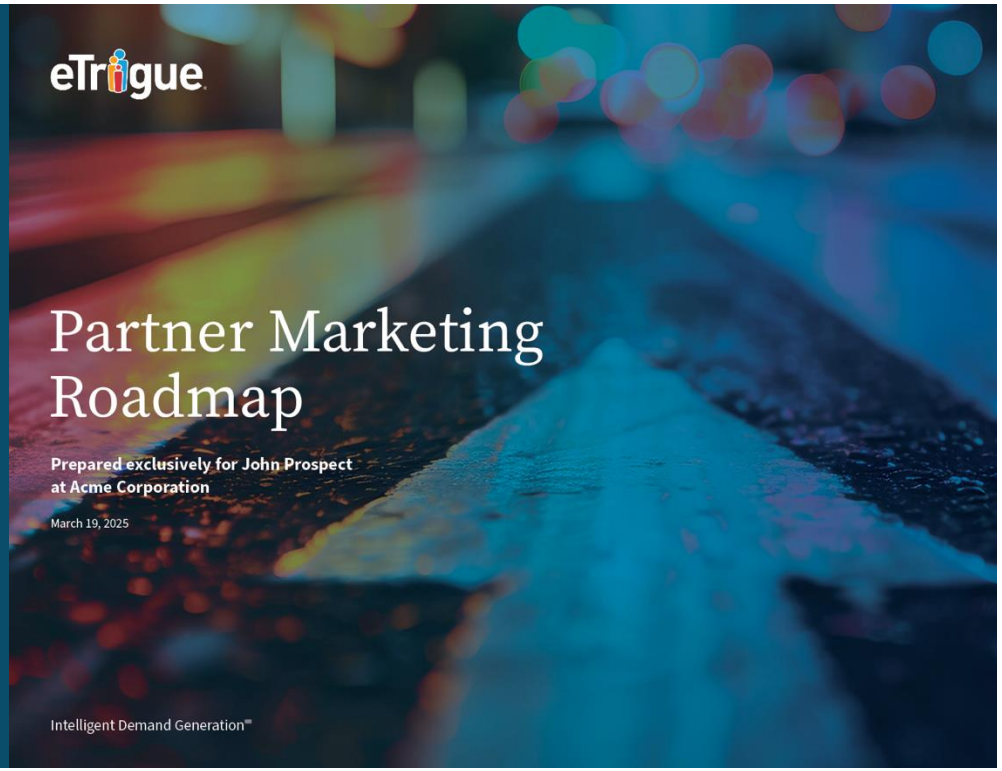
etrigue.com/mugclub

Get a Complimentary Partner Marketing Roadmap:

Peer Rankings

Personal guide to scale partner marketing

Tips on what to prioritize for the most impact



eTrigue.com/Roadmap

eTrigue
Agentic AI:
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Polling Question:

How are you leveraging Agentic AI for your business today?

1) Not sure yet
2) Just getting started
3) Developed an Agent to automation processes
4) Have an AI focused strategy for 2025

Agentic AI.....vs.....Chat GPT

- **Agentic AI**
  - ✓ Extension of Team
  - ✓ Decision-making
  - ✓ Planning
  - ✓ Adaptive Execution
  - ✓ Complete Complex, Multi-Step Processes

- **ChatGPT**
  - ✓ Is a Generative AI Chatbot based on Large Language Models, GPT-4o
  - ✓ Writing
  - ✓ Learning
  - ✓ Brainstorming
  - ✓ Creative Content Generation
- **Human in the Loop / Agents working with Agents**

How AI and Agentic AI can accelerate and deepen the customer relationship throughout the lifecycle

AI supports targeting the right Accounts and the right Personas

- Ingest Data from Multiple Sources
  - ✓ Learn from Structured & Unstructured Data
  - ✓ Identify Patterns in Winning Accounts
- Prioritize and Score Accounts
- Discover ICP – “Ideal Customer Profile”
- Uncover new microsegments, cross-sell, partner-ready or co-sell accounts with high potential

Agentic AI + Early Prospect Engagement

The majority of the B2B selling process happens before an account or individual is in contact with Sales or a Partner….

How AI supports Engagement:

- Content Optimization
- Journey Orchestration
- Automating Handoff to Sales
- SDR Call

“B2B buyers are nearly 70% through their purchasing process before engaging with sellers — and 80% of the time, it’s the buyers who initiate the first contact, new research revealed.”

Fundamental Facets of Successful B2B GTM

Building enduring, meaningful, value-based relationships that drive growth…period…

- Strategy & targeting (account based, buying group engagement, ICP)
- Demand generation (inbound, outbound)
- Data insights and orchestration
  - ✓ (Customer 360, intent and buying signals, journey orchestration, scoring)
- Sales & partner engagement
  - ✓ (sales enablement, xDR programs, partner co-marketing, CRM hygiene)
- Lifecycle expansion (adoption, customer marketing, cross-sell/upsell, advocacy)
- Measurement & optimization (funnel health and performance, attribution)

How can AI make the Sales Engagement more meaningful with a potential customer?

Sales Enablement

- Customer Experience
- Automated CRM
- Scoring
- Persona Matching and Engagement
- Contact Insights → eTrigue “Lead Insights”
- ABX Workflows
- Sales Coaching

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Introducing Lead Enrichment
“Lead Insights
from eTrigue”

eTrigue

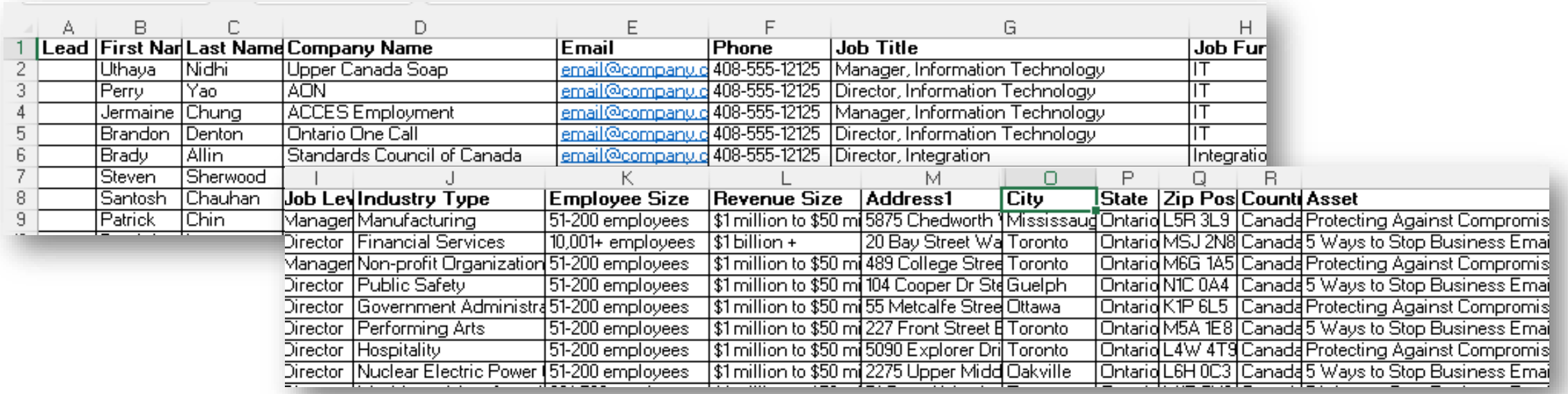
“75% of Partners don’t have the resources or time to market your solutions.”

Forrester Report

“If you don’t market for your partners, it just won’t happen. Most don’t have the time or the skills to drive demand or maintain your brand.”

Jay McBain
Chief Analyst, Canalys

The Problem with Traditional Programs: Lead Data is Extremely Limited & Outdated



Lead	First Nar	Last Name	Company Name	Email	Phone	Job Title	Job Fur
	Uthaya	Nidhi	Upper Canada Soap	email@company.c	408-555-12125	Manager, Information Technology	IT
	Perry	Yao	AON	email@company.c	408-555-12125	Director, Information Technology	IT
	Jermaine	Chung	ACCES Employment	email@company.c	408-555-12125	Manager, Information Technology	IT
	Brandon	Denton	Ontario One Call	email@company.c	408-555-12125	Director, Information Technology	IT
	Brady	Allin	Standards Council of Canada	email@company.c	408-555-12125	Director, Integration	Integratio
	Steven	Sherwood					
	Santosh	Chauhan					
	Patrick	Chin					

Job Lev	Industry Type	Employee Size	Revenue Size	Address1	City	State	Zip Pos	Count	Asset
Manager	Manufacturing	51-200 employees	$1 million to $50 mi	5875 Chedworth	Mississaug	Ontario	L5R 3L9	Canada	Protecting Against Compromis
Director	Financial Services	10,001+ employees	$1 billion +	20 Bay Street Wa	Toronto	Ontario	M5J 2N8	Canada	5 Ways to Stop Business Emai
Manager	Non-profit Organization	51-200 employees	$1 million to $50 mi	489 College Stree	Toronto	Ontario	M6G 1A5	Canada	Protecting Against Compromis
Director	Public Safety	51-200 employees	$1 million to $50 mi	104 Cooper Dr Ste	Guelph	Ontario	N1C 0A4	Canada	5 Ways to Stop Business Emai
Director	Government Administra	51-200 employees	$1 million to $50 mi	55 Metcalfe Stree	Ottawa	Ontario	K1P 6L5	Canada	Protecting Against Compromis
Director	Performing Arts	51-200 employees	$1 million to $50 mi	227 Front Street E	Toronto	Ontario	M5A 1E8	Canada	5 Ways to Stop Business Emai
Director	Hospitality	51-200 employees	$1 million to $50 mi	5090 Explorer Dri	Toronto	Ontario	L4W 4T9	Canada	Protecting Against Compromis
Director	Nuclear Electric Power	51-200 employees	$1 million to $50 mi	2275 Upper Midd	Oakville	Ontario	L6H 0C3	Canada	5 Ways to Stop Business Emai

- Limited to contact details, company, asset downloaded
- Delayed weekly or monthly notification via CSV/Excel

eTrigue Helps Sales Reps Follow Up "With Confidence"

Lead Insights

Prospect Insights, delivered in real-time

Interests

Background, history and social media

Company Insights

Company, News, Messaging & Competitors

Follow-up Emails

Suggested Responses for Sales Reps

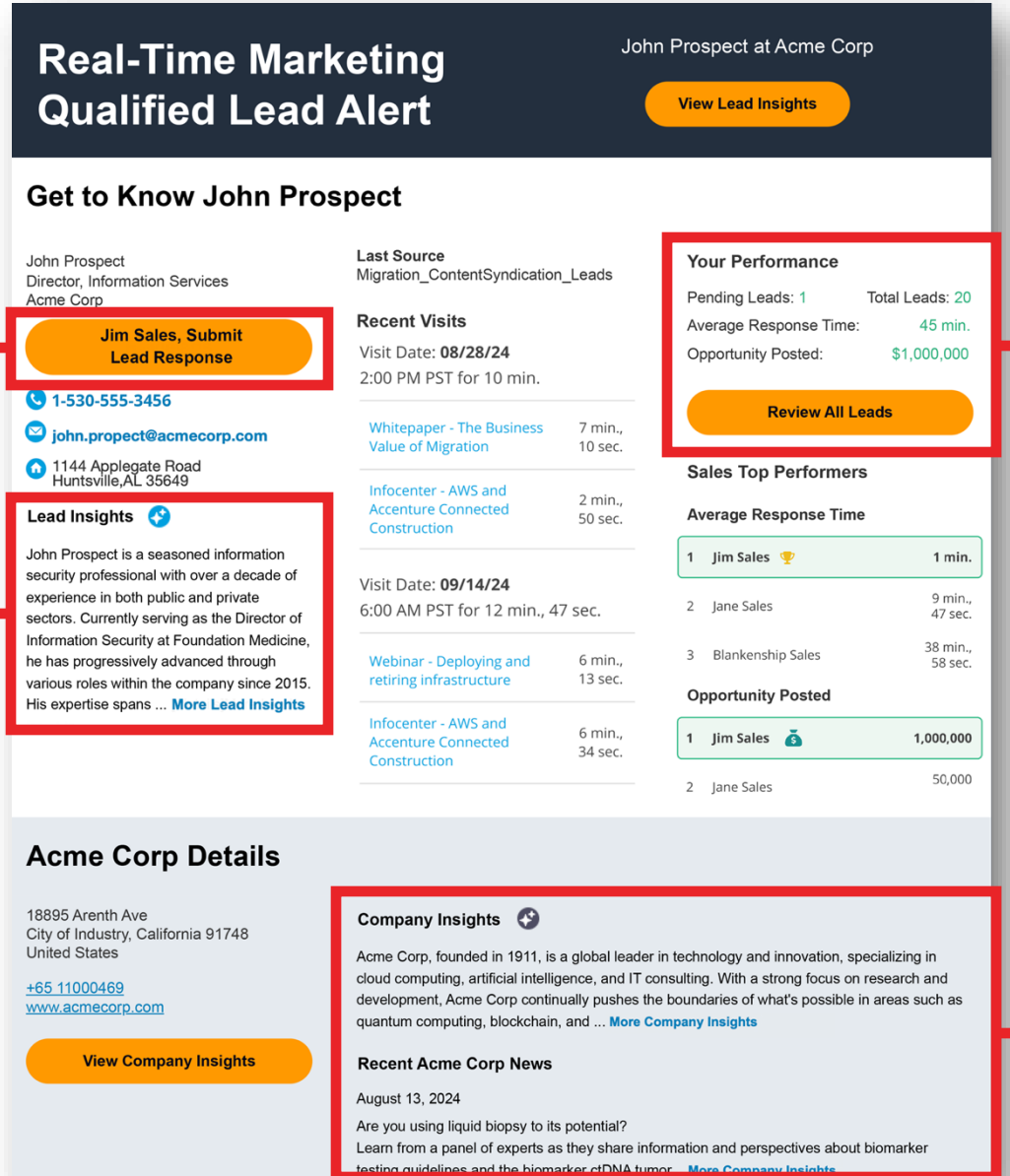
Real-time "Lead & Company Insights"

Email Lead Alerts to Sales Reps Drive Results

eTrigue

Next Step: "Sales Rep Click Here"

Prospect Insights & Background



Sales Team Performance

Company Insights, News and PR

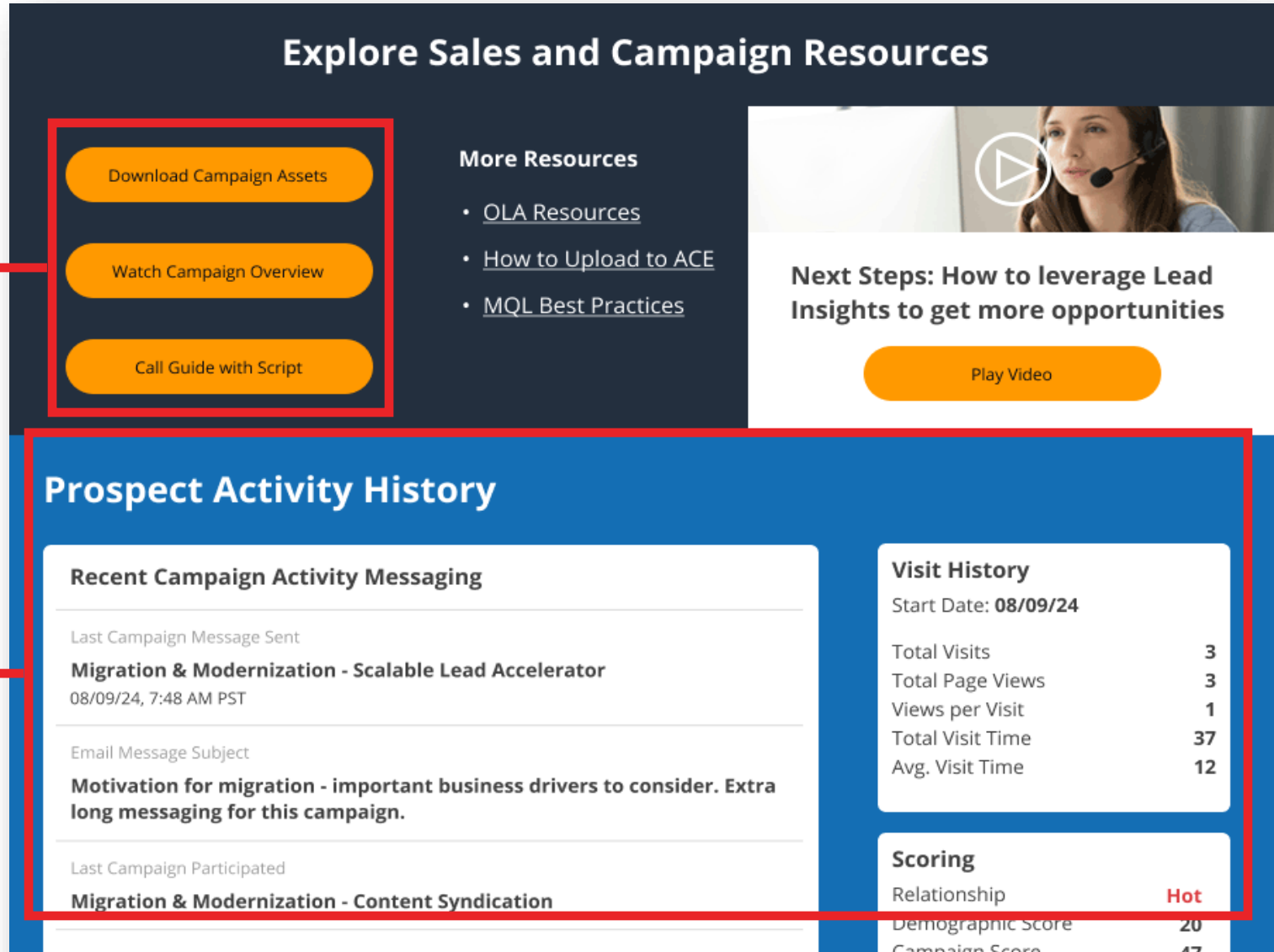
Access to "Resources" for Follow-up:

Battle Cards, Call Scripts, Campaign Overview & Past Activities

Campaign Assets, Call Guides & Follow-up Training

Campaign Attribution & Opportunity Tracking

Prospect Activities, History and Scoring

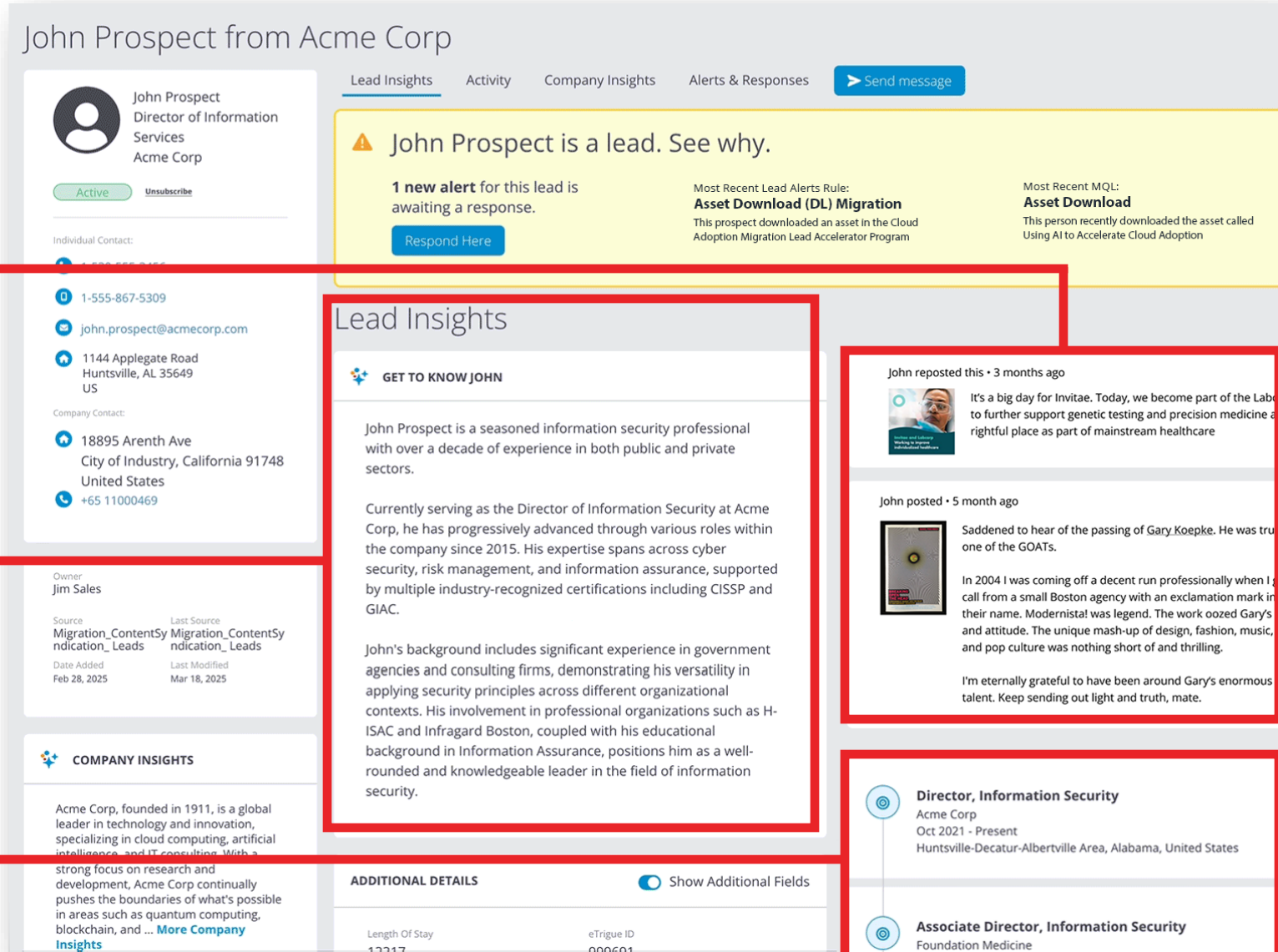


“Prospect Insights” - Background & Social Media

Prospect Social Media & Interests

Prospect Insights & Background

Job History & Experience

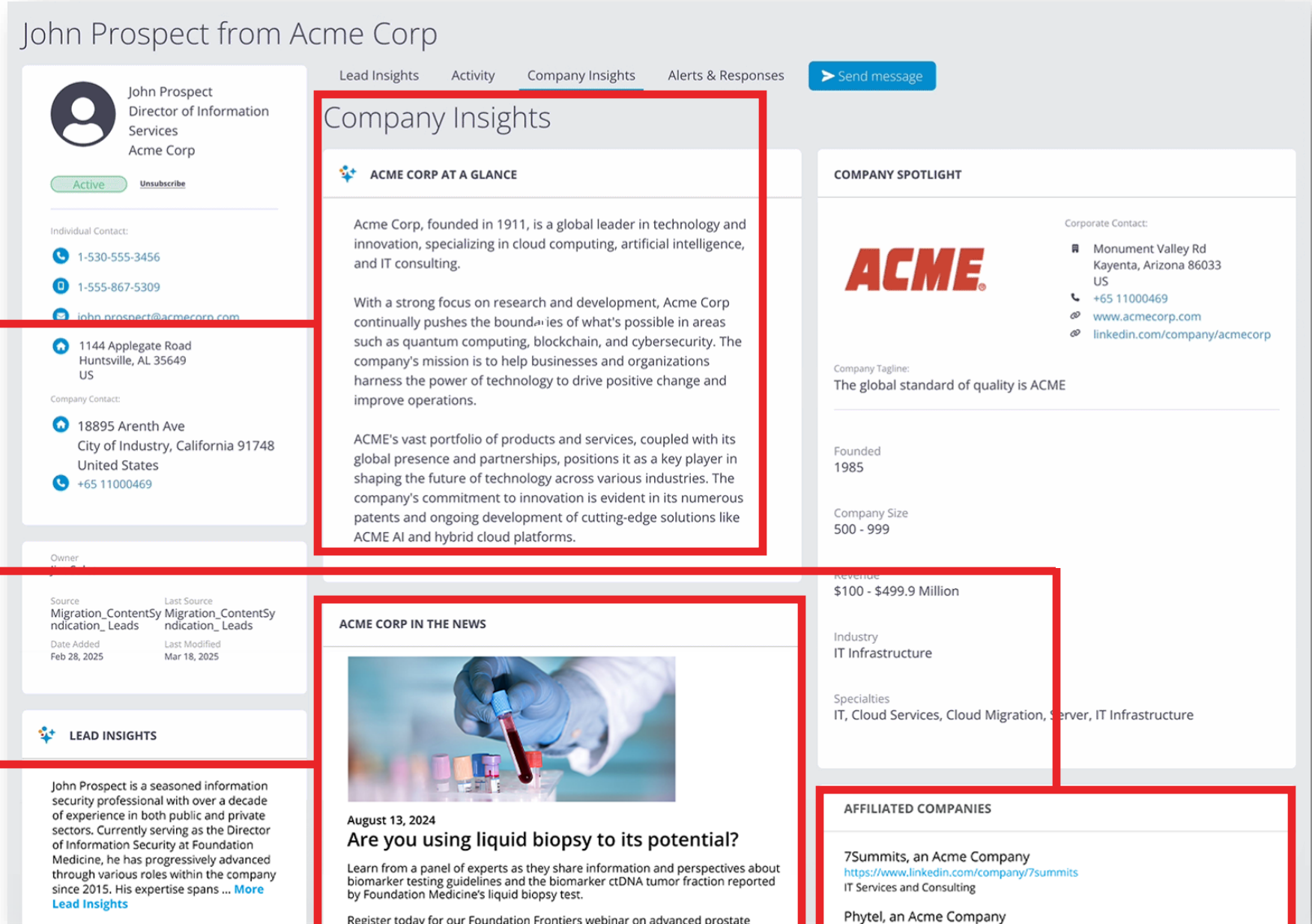


“Company Insights” - Details, Summary & News

Company Insights & Overview

Affiliated Companies & Competitors

Latest News & PR

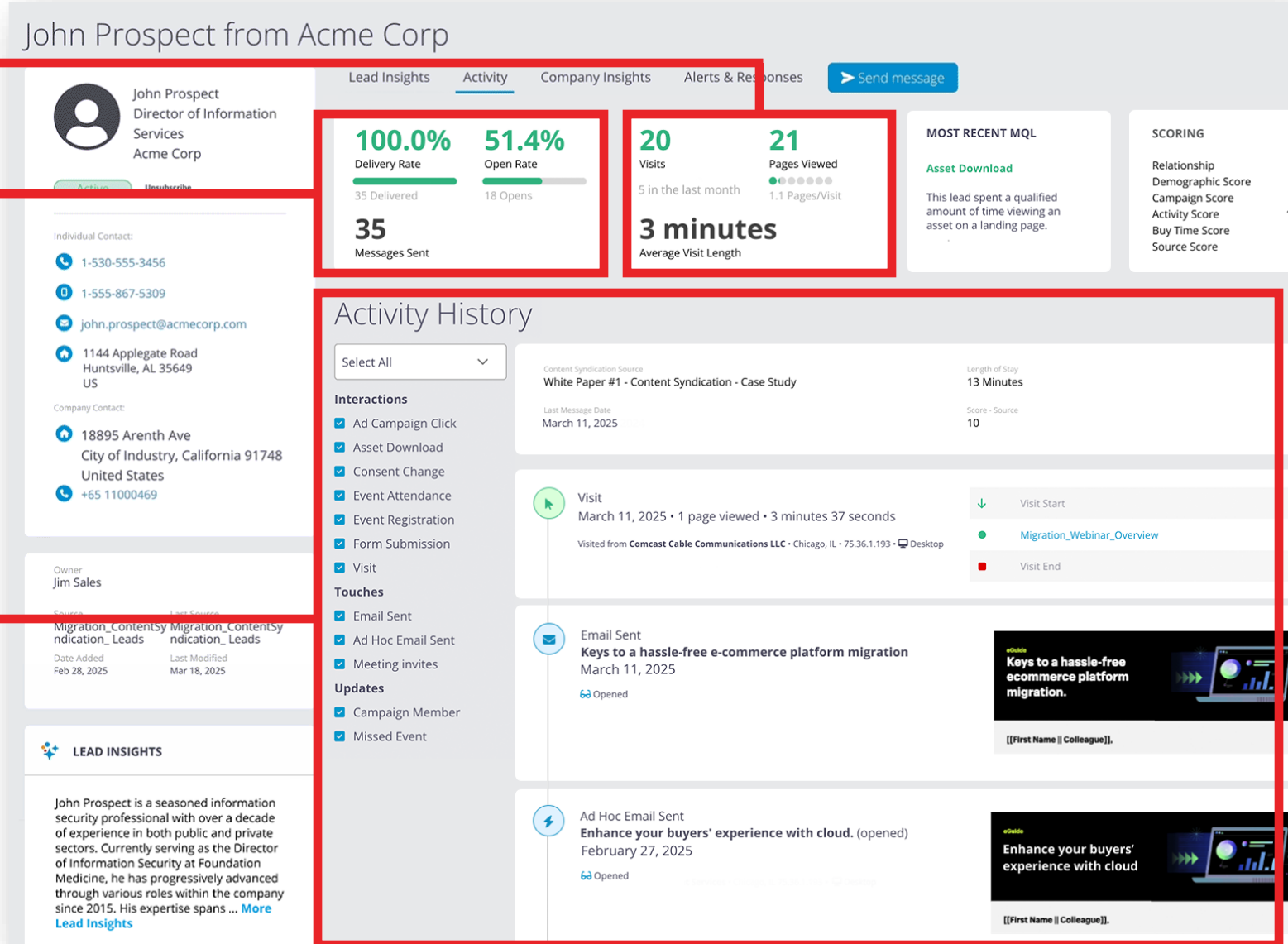


“Prospect Activity” - Campaign Interest & History

Show Prospect Interest Levels in Content

All Campaign Exposure

Campaign History

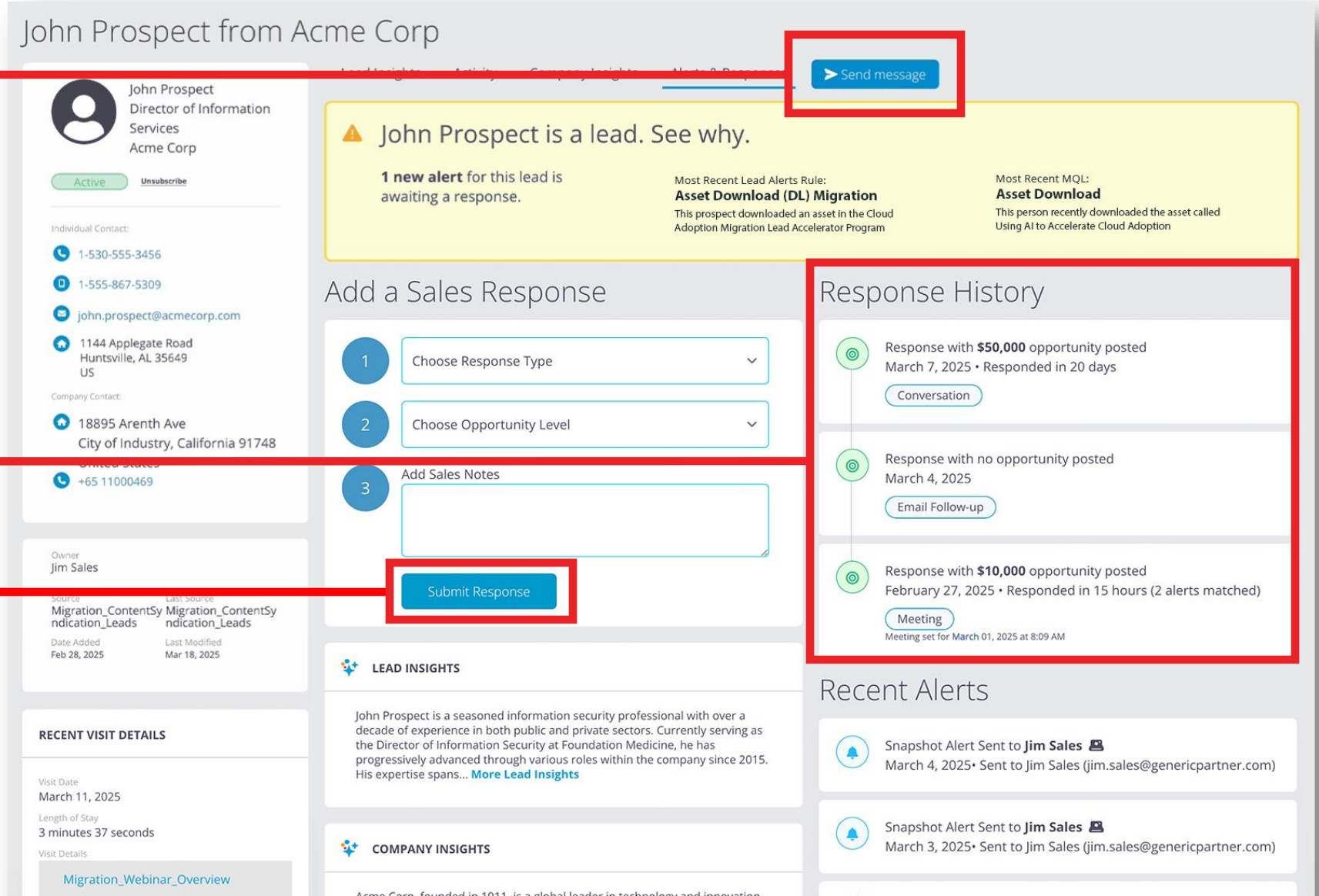


“Alerts & Responses” - Record Sales Rep Follow up

Suggested Follow-up Messages

Sales Rep Response History

Select Rep Response

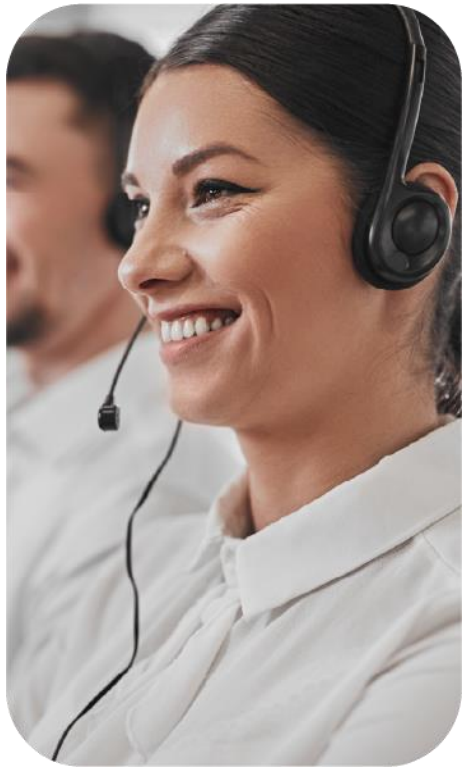


Leveraging Generative AI for Real-time "Sales Insights"

- Amazon Bedrock, Amazon DynamoDB, AWS Lambda
- Anthropic Claude Sonnet/Haiku, Google Custom Search
- Scalable, secure, instantaneous Lead & Company Insights
- Real-time contact validation, Background, Experience
- Company and Prospect Social Media
- Company Messaging, Competitors, Current News/PR

“Lead & Company Insights” > Sales Rep. Confidence

- “AI Sales Insights” for Prospect, Company and News
- Complete Prospect Background, Skillset, History and Social Media
- “Insights” are delivered in Real-time, with Sales Rep Tracking
- Suggested Follow-up emails prebuilt for Sales Reps to Respond
- Large scale Intent-based Lead Insights for Informed Prospecting



How to motivate your team - "Competition"

- Share how each Sales Rep is performing
  - Follow-up & responsiveness
  - # of Meetings
  - $ of Opportunities
  - Call out superstars for recognition
- Run a contest – Awareness & Appreciation (Most meetings wins)
- Highlight weekly ranking on "Team calls"

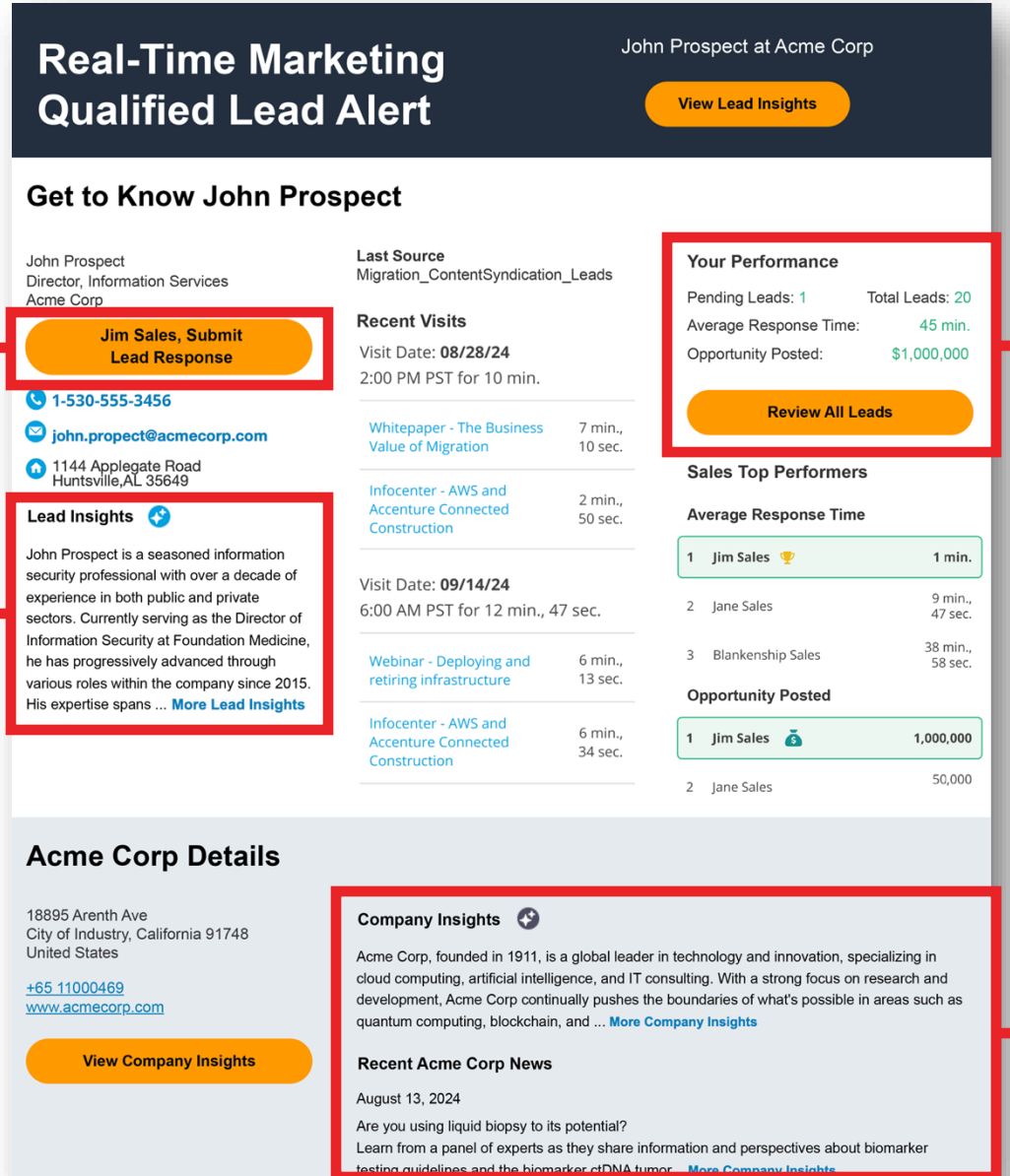
Real-time "Lead & Company Insights"

Email Lead Alerts to Sales Reps Drive Results

eTrigue

Next Step: "Sales Rep Click Here"

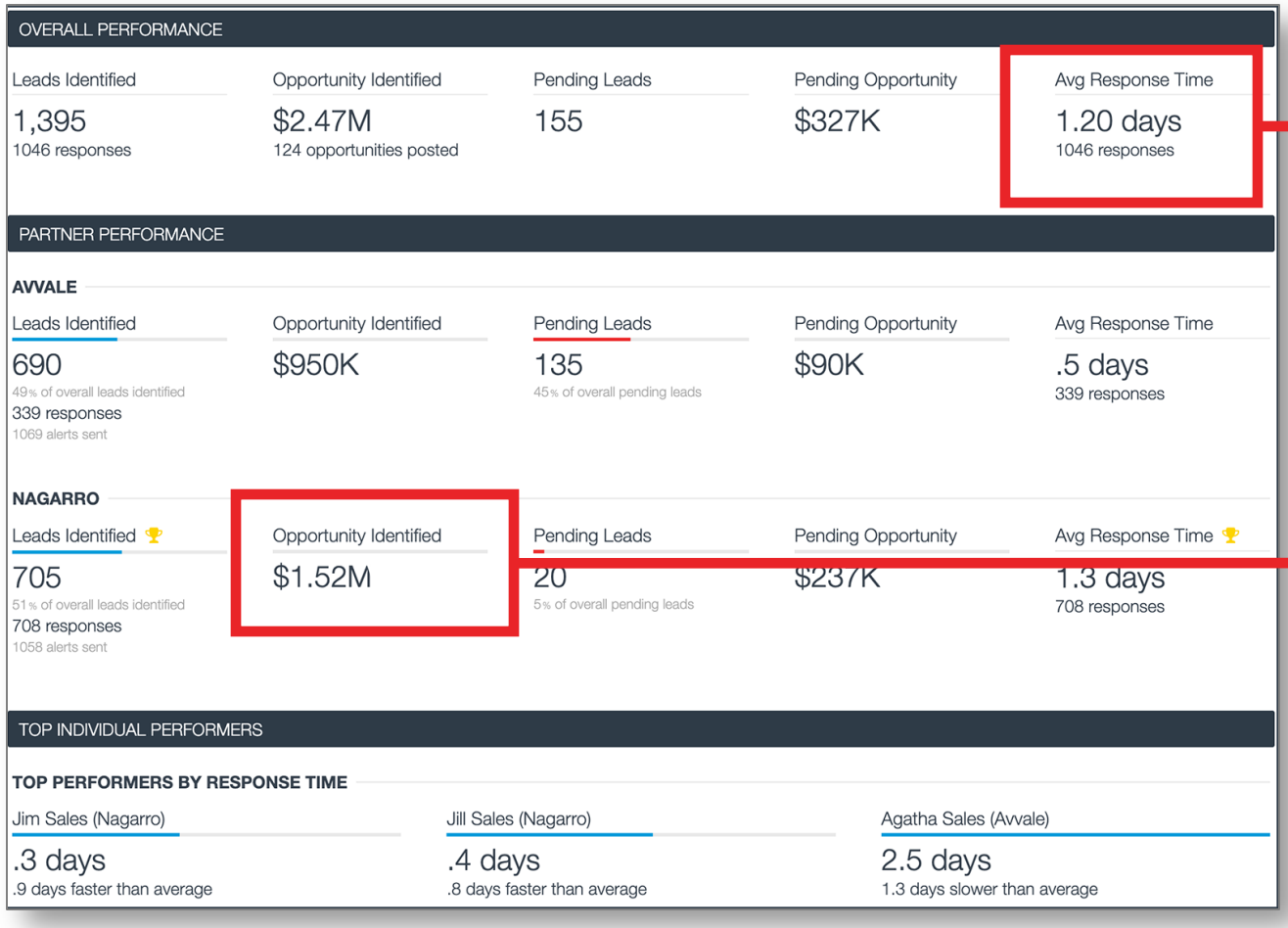
Prospect Insights & Background



Sales Team Performance

Company Insights, News and PR

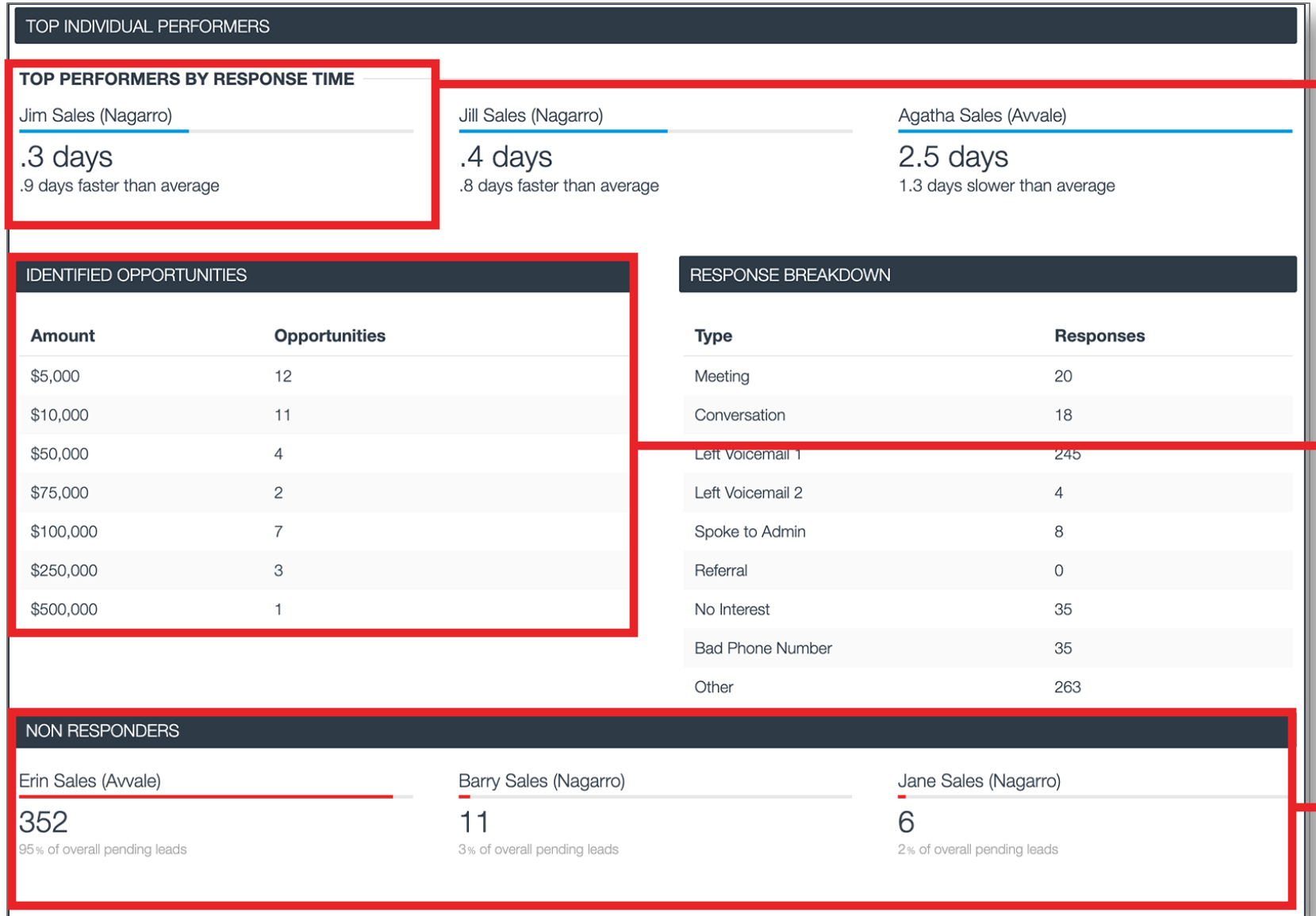
“Track Performance” of each Partner



Program Roll-Up

Individual Partners

“Track Performance” of Each Partner Sales Rep



Sales Follow up

Opportunities & Outcomes

Needs Attention

eTrigue Sales Insights AI Orchestration Layer:

- **eTrigue Application (User Interface):** Connects to Amazon Bedrock for AI-driven automation.
- **Amazon Bedrock (AWS AI Service):** Acts as a central AI service hub.
- **AWS Lambda (Serverless Processing):** Executes custom business logic.
- **Anthropic Claude Sonnet & Anthropic Haiku (AI Models):** Provides AI-generated responses.
- **Google Custom Search (Search API):** Fetches relevant search results.

Benefits of this Architecture

- **Scalability:** Leverages AWS serverless architecture for dynamic scaling.
- **AI-Powered Intelligence:** Utilizes Advanced AI models via Amazon Bedrock.
- **Seamless Search Integration:** Google Custom Search enables broader information access.
- **Low-Latency Processing:** Amazon Lambda ensures efficient execution of API calls.

“Follow up with Confidence, Close More Deals.”

1. **Timely Follow-Up**
   Following up within minutes of receiving leads to maximize conversion chances.
2. **Real-Time Lead Distribution**
   Instant distribution of leads greatly enhances Sales’ response times.
3. **Sales Team Training & Accountability**
   Involving Sales in campaign training fosters alignment and ensures priority of resources.
4. **Comprehensive Prospect Insights**
   Detailed information about prospects/companies allows Sales Reps to “follow up with confidence”.
5. **Sales Resource Accessibility**
   Battle cards and call scripts should be easily accessible.

eTrigue
Q&A

Thank you!

Let's meet:

etrigue.com/demo

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