



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



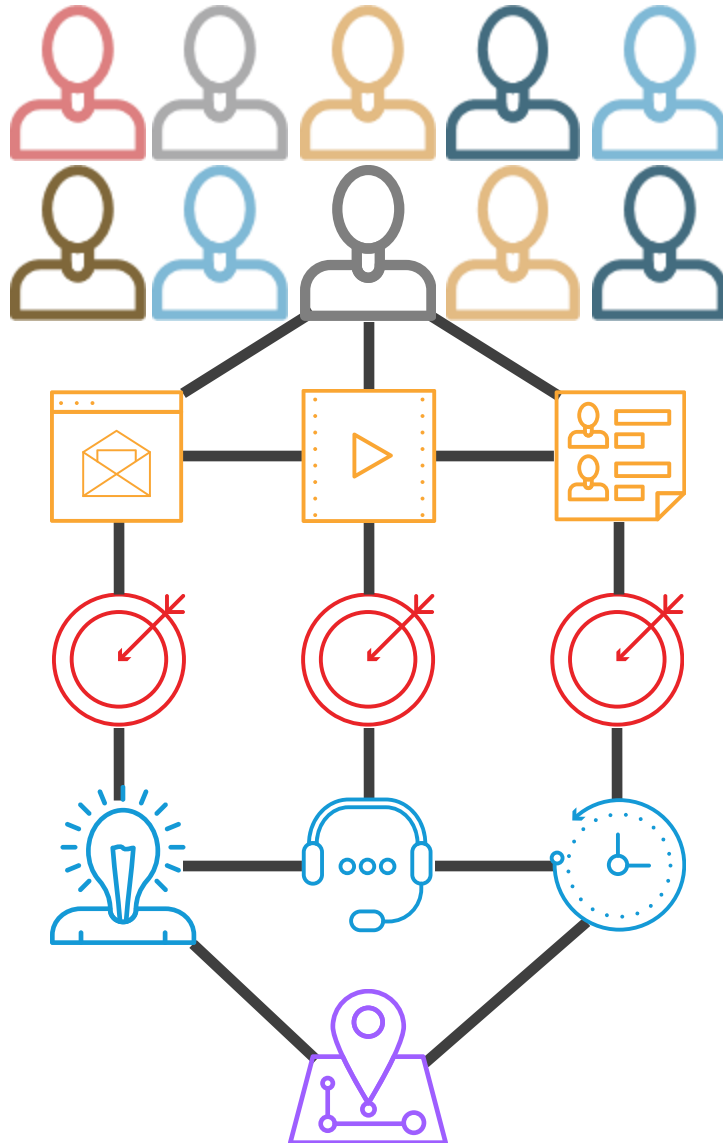
# About eTrigue

- “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:



# 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](http://etrigue.com/mugclub)**

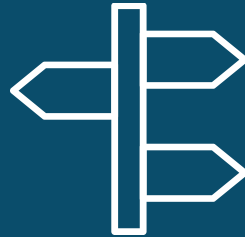
# Get a Complimentary Partner Marketing Roadmap:



Peer  
Rankings



Personal  
guide to scale  
partner  
marketing



Tips on what  
to prioritize  
for the most  
impact



[eTrigue.com/Roadmap](https://etrigue.com/Roadmap)





Agentic AI:

Transforming Customer 360  
& B2B GTM for the Next Era



# Polling Question:

**How are you leveraging Agentic AI for your business today?**

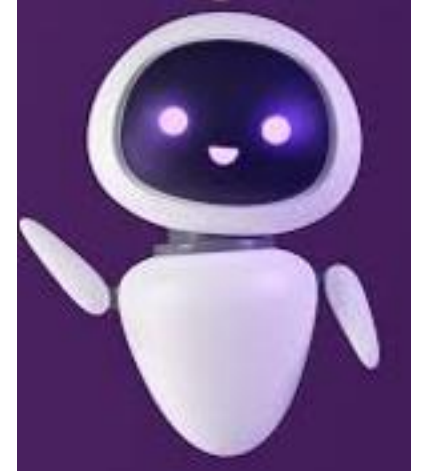
- 1) Not sure yet
- 2) Just getting started
- 3) Developed an Agent to automation processes
- 4) Have an AI focused strategy for 2025



# 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

# Title

## Header

- text
- text
- text
- text
- text



A hand holding a smartphone, with a bokeh background of colorful lights. The text is overlaid on the image.

# Introducing Lead Enrichment

## “Lead Insights from 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**

	A	B	C	D	E	F	G			H			
1	Lead	First Name	Last Name	Company Name	Email	Phone	Job Title			Job Function			
2		Uthaya	Nidhi	Upper Canada Soap	email@company.c	408-555-12125	Manager, Information Technology			IT			
3		Perry	Yao	AON	email@company.c	408-555-12125	Director, Information Technology			IT			
4		Jermaine	Chung	ACCES Employment	email@company.c	408-555-12125	Manager, Information Technology			IT			
5		Brandon	Denton	Ontario One Call	email@company.c	408-555-12125	Director, Information Technology			IT			
6		Brady	Allin	Standards Council of Canada	email@company.c	408-555-12125	Director, Integration			Integration			
7		Steven	Sherwood	I	J	K	L	M	O	P	Q	R	
8		Santosh	Chauhan	Job Level	Industry Type	Employee Size	Revenue Size	Address1	City	State	Zip Pos	Country	Asset
9		Patrick	Chin	Manager	Manufacturing	51-200 employees	\$1 million to \$50 million	5875 Chedworth	Mississauga	Ontario	L5R 3L9	Canada	Protecting Against Compromis
				Director	Financial Services	10,001+ employees	\$1 billion +	20 Bay Street West	Toronto	Ontario	M5J 2N8	Canada	5 Ways to Stop Business Email
				Manager	Non-profit Organization	51-200 employees	\$1 million to \$50 million	489 College Street	Toronto	Ontario	M6G 1A5	Canada	Protecting Against Compromis
				Director	Public Safety	51-200 employees	\$1 million to \$50 million	104 Cooper Drive	Guelph	Ontario	N1C 0A4	Canada	5 Ways to Stop Business Email
				Director	Government Administration	51-200 employees	\$1 million to \$50 million	55 Metcalfe Street	Ottawa	Ontario	K1P 6L5	Canada	Protecting Against Compromis
				Director	Performing Arts	51-200 employees	\$1 million to \$50 million	227 Front Street East	Toronto	Ontario	M5A 1E8	Canada	5 Ways to Stop Business Email
				Director	Hospitality	51-200 employees	\$1 million to \$50 million	5090 Explorer Drive	Toronto	Ontario	L4W 4T9	Canada	Protecting Against Compromis
				Director	Nuclear Electric Power	51-200 employees	\$1 million to \$50 million	2275 Upper Middle	Oakville	Ontario	L6H 0C3	Canada	5 Ways to Stop Business Email

- 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

Next Step: “Sales Rep Click Here”

Prospect Insights & Background

Sales Team Performance

Company Insights, News and PR

Real-Time Marketing Qualified Lead Alert

John Prospect at Acme Corp

View Lead Insights

Get to Know John Prospect

John Prospect  
Director, Information Services  
Acme Corp

1-530-555-3456

john.prospect@acmecorp.com

1144 Applegate Road  
Huntsville, AL 35649

Last Source  
Migration\_ContentSyndication\_Leads

Recent Visits

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2 Jane Sales9 min., 47 sec.

3 Blankenship Sales38 min., 58 sec.

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2 Jane Sales50,000

Lead Insights

John Prospect is a seasoned information security professional with over a decade of experience in both public and private sectors. Currently serving as the Director of Information Security at Foundation Medicine, he has progressively advanced through various roles within the company since 2015. His expertise spans ... [More Lead Insights](#)

Acme Corp Details

18895 Arenth Ave  
City of Industry, California 91748  
United States

+65 11000469  
www.acmecorp.com

View Company Insights

Company Insights

Acme Corp, founded in 1911, is a global leader in technology and innovation, specializing in cloud computing, artificial intelligence, and IT consulting. With a strong focus on research and development, Acme Corp continually pushes the boundaries of what's possible in areas such as quantum computing, blockchain, and ... [More Company Insights](#)

Recent Acme Corp News

August 13, 2024

Are you using liquid biopsy to its potential? Learn from a panel of experts as they share information and perspectives about biomarker testing guidelines and the biomarker ctDNA tumor ... [More Company Insights](#)

# 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

### Explore Sales and Campaign Resources

Download Campaign Assets

Watch Campaign Overview

Call Guide with Script

#### More Resources

- [OLA Resources](#)
- [How to Upload to ACE](#)
- [MQL Best Practices](#)

#### Next Steps: How to leverage Lead Insights to get more opportunities

Play Video

### Prospect Activity History

#### Recent Campaign Activity Messaging

Last Campaign Message Sent

**Migration & Modernization - Scalable Lead Accelerator**  
08/09/24, 7:48 AM PST

Email Message Subject

**Motivation for migration - important business drivers to consider. Extra long messaging for this campaign.**

Last Campaign Participated

**Migration & Modernization - Content Syndication**

#### Visit History

Start Date: 08/09/24

Total Visits	3
Total Page Views	3
Views per Visit	1
Total Visit Time	37
Avg. Visit Time	12

#### Scoring

Relationship	Hot
Demographic Score	20
Campaign Score	47

# “Prospect Insights” - Background & Social Media

## Prospect Social Media & Interests

## Prospect Insights & Background

## Job History & Experience

### John Prospect from Acme Corp



John Prospect  
Director of Information  
Services  
Acme Corp

Active Unsubscribe

Individual Contact:

1-555-867-5309

john.prospect@acmecorp.com

1144 Applegate Road  
Huntsville, AL 35649  
US

Company Contact:

18895 Arenth Ave  
City of Industry, California 91748  
United States  
+65 11000469

Owner  
Jim Sales

Source: Migration\_ContentSyndication\_Leads  
Last Source: Migration\_ContentSyndication\_Leads  
Date Added: Feb 28, 2025  
Last Modified: Mar 18, 2025

#### COMPANY INSIGHTS

Acme Corp, founded in 1911, is a global leader in technology and innovation, specializing in cloud computing, artificial intelligence, and IT consulting. With a strong focus on research and development, Acme Corp continually pushes the boundaries of what's possible in areas such as quantum computing, blockchain, and ... [More Company Insights](#)

#### Lead Insights

#### Activity

#### Company Insights

#### Alerts & Responses

Send message

John Prospect is a lead. See why.

1 new alert for this lead is awaiting a response.

Respond Here

Most Recent Lead Alerts Rule:

**Asset Download (DL) Migration**

This prospect downloaded an asset in the Cloud Adoption Migration Lead Accelerator Program

Most Recent MQL:

**Asset Download**

This person recently downloaded the asset called Using AI to Accelerate Cloud Adoption

### Lead Insights

#### GET TO KNOW JOHN

John Prospect is a seasoned information security professional with over a decade of experience in both public and private sectors.

Currently serving as the Director of Information Security at Acme Corp, he has progressively advanced through various roles within the company since 2015. His expertise spans across cyber security, risk management, and information assurance, supported by multiple industry-recognized certifications including CISSP and GIAC.

John's background includes significant experience in government agencies and consulting firms, demonstrating his versatility in applying security principles across different organizational contexts. His involvement in professional organizations such as H-ISAC and Infragard Boston, coupled with his educational background in Information Assurance, positions him as a well-rounded and knowledgeable leader in the field of information security.

John reposted this • 3 months ago



It's a big day for Invitae. Today, we become part of the Lab to further support genetic testing and precision medicine in a rightful place as part of mainstream healthcare

John posted • 5 month ago



Saddened to hear of the passing of Gary Koepke. He was truly one of the GOATS.

In 2004 I was coming off a decent run professionally when I call from a small Boston agency with an exclamation mark in their name. Modernista! was legend. The work oozed Gary's and attitude. The unique mash-up of design, fashion, music, and pop culture was nothing short of and thrilling.

I'm eternally grateful to have been around Gary's enormous talent. Keep sending out light and truth, mate.



#### Director, Information Security

Acme Corp  
Oct 2021 - Present  
Huntsville-Decatur-Albertville Area, Alabama, United States



#### Associate Director, Information Security

Foundation Medicine

# “Company Insights” - Details, Summary & News


## Company Insights & Overview

## Affiliated Companies & Competitors

## Latest News & PR

John Prospect from Acme Corp

Lead Insights Activity **Company Insights** Alerts & Responses [Send message](#)



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Director of Information Services  
Acme Corp

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### Company Insights


 **ACME CORP AT A GLANCE**

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With a strong focus on research and development, Acme Corp continually pushes the boundaries of what's possible in areas such as quantum computing, blockchain, and cybersecurity. The company's mission is to help businesses and organizations harness the power of technology to drive positive change and improve operations.

ACME's vast portfolio of products and services, coupled with its global presence and partnerships, positions it as a key player in shaping the future of technology across various industries. The company's commitment to innovation is evident in its numerous patents and ongoing development of cutting-edge solutions like ACME AI and hybrid cloud platforms.

### COMPANY SPOTLIGHT



Corporate Contact:

Monument Valley Rd  
Kayenta, Arizona 86033  
US

+65 11000469

[www.acmecorp.com](http://www.acmecorp.com)

[linkedin.com/company/acmecorp](https://linkedin.com/company/acmecorp)

Company Tagline:  
The global standard of quality is ACME

Founded  
1985


Company Size  
500 - 999

Revenue  
\$100 - \$499.9 Million

Industry  
IT Infrastructure

Specialties  
IT, Cloud Services, Cloud Migration, Server, IT Infrastructure

### ACME CORP IN THE NEWS



August 13, 2024

#### Are you using liquid biopsy to its potential?

Learn from a panel of experts as they share information and perspectives about biomarker testing guidelines and the biomarker ctDNA tumor fraction reported by Foundation Medicine's liquid biopsy test.

Register today for our Foundation Frontiers webinar on advanced prostate

### AFFILIATED COMPANIES

7Summits, an Acme Company  
<https://www.linkedin.com/company/7summits>  
IT Services and Consulting

Phytel, an Acme Company



# “Prospect Activity” - Campaign Interest & History

Show Prospect Interest Levels in Content

All Campaign Exposure

Campaign History

John Prospect

Director of Information Services

Acme Corp

Active

Unsubscribe

Individual Contact:

1-530-555-3456

1-555-867-5309

john.prospect@acmecorp.com

1144 Applegate Road

Huntsville, AL 35649

US

Company Contact:

18895 Arenth Ave

City of Industry, California 91748

United States

+65 11000469

Owner

Jim Sales

Campaigns

Migration\_ContentSyndication\_Leads

Migration\_ContentSyndication\_Leads

Date Added

Feb 28, 2025

Last Modified

Mar 18, 2025

LEAD INSIGHTS

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Lead Insights

Activity

Company Insights

Alerts & Responses

> Send message

100.0%

Delivery Rate

35 Delivered

51.4%

Open Rate

18 Opens

20

Visits

5 in the last month

21

Pages Viewed

1.1 Pages/Visit

35

Messages Sent

3 minutes

Average Visit Length

MOST RECENT MQL

Asset Download

This lead spent a qualified amount of time viewing an asset on a landing page.

SCORING

Relationship

Demographic Score

Campaign Score

Activity Score

Buy Time Score

Source Score

Activity History

Select All

Interactions

☒ Ad Campaign Click

☒ Asset Download

☒ Consent Change

☒ Event Attendance

☒ Event Registration

☒ Form Submission

☒ Visit

Touches

☒ Email Sent

☒ Ad Hoc Email Sent

☒ Meeting invites

Updates

☒ Campaign Member

☒ Missed Event

Content Syndication Source

White Paper #1 - Content Syndication - Case Study

Last Message Date

March 11, 2025

Length of Stay

13 Minutes

Score - Source

10

Visit

March 11, 2025 • 1 page viewed • 3 minutes 37 seconds

Visited from Comcast Cable Communications LLC • Chicago, IL • 75.36.1.193 • Desktop

Visit Start

Migration\_Webinar\_Overview

Visit End

Email Sent

Keys to a hassle-free e-commerce platform migration

March 11, 2025

Opened

Keys to a hassle-free e-commerce platform migration.

[[First Name | Colleague]].

Ad Hoc Email Sent

Enhance your buyers' experience with cloud. (opened)

February 27, 2025

Opened

Enhance your buyers' experience with cloud

[[First Name | Colleague]].

# “Alerts & Responses” - Record Sales Rep Follow up

Suggested Follow-up Messages

Sales Rep Response History

Select Rep Response

John Prospect from Acme Corp

John Prospect

Director of Information Services

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Active

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Source

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Mar 18, 2025

RECENT VISIT DETAILS

Visit Date

March 11, 2025

Length of Stay

3 minutes 37 seconds

Visit Details

Migration\_Webinar\_Overview

John Prospect is a lead. See why.

1 new alert for this lead is awaiting a response.

Most Recent Lead Alerts Rule:

Asset Download (DL) Migration

This prospect downloaded an asset in the Cloud Adoption Migration Lead Accelerator Program

Most Recent MQL:

Asset Download

This person recently downloaded the asset called Using AI to Accelerate Cloud Adoption

Add a Sales Response

1 Choose Response Type

2 Choose Opportunity Level

3 Add Sales Notes

Submit Response

Response History

Response with \$50,000 opportunity posted March 7, 2025 • Responded in 20 days

Conversation

Response with no opportunity posted March 4, 2025

Email Follow-up

Response with \$10,000 opportunity posted February 27, 2025 • Responded in 15 hours (2 alerts matched)

Meeting

Meeting set for March 01, 2025 at 8:09 AM

Recent Alerts

Snapshot Alert Sent to Jim Sales

March 4, 2025 • Sent to Jim Sales (jim.sales@genericpartner.com)

Snapshot Alert Sent to Jim Sales

March 3, 2025 • Sent to Jim Sales (jim.sales@genericpartner.com)

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COMPANY INSIGHTS

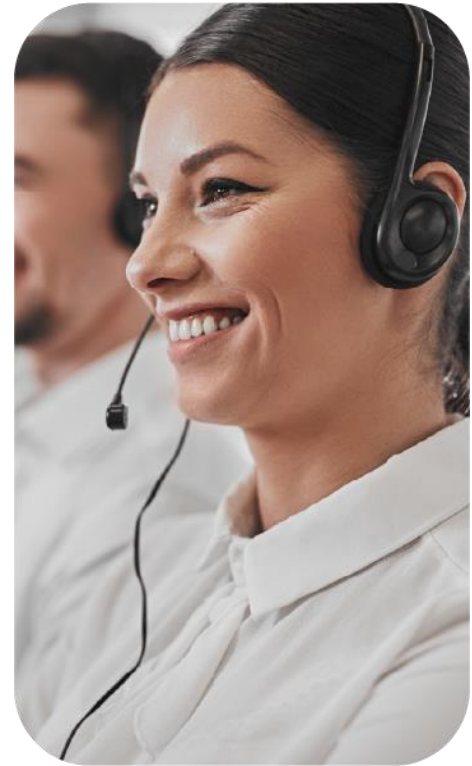
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# Leveraging Generative AI for Real-time “Sales Insights”

- 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

Next Step: “Sales Rep Click Here”

Prospect Insights & Background

Sales Team Performance

Company Insights, News and PR

Real-Time Marketing Qualified Lead Alert

John Prospect at Acme Corp

View Lead Insights

Get to Know John Prospect

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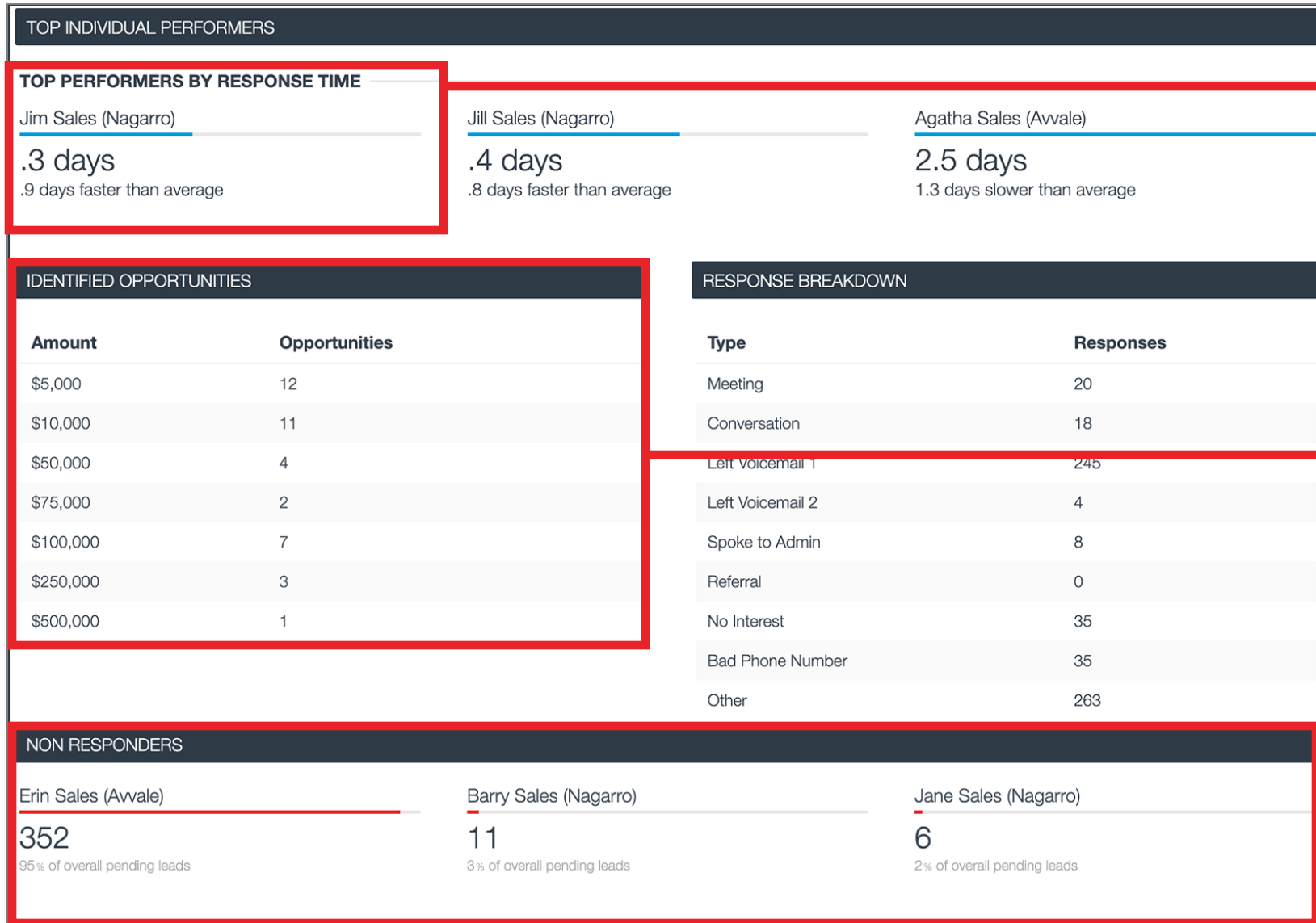
# “Track Performance” of each Partner

OVERALL PERFORMANCE				
Leads Identified	Opportunity Identified	Pending Leads	Pending Opportunity	Avg Response Time
1,395 1046 responses	\$2.47M 124 opportunities posted	155	\$327K	1.20 days 1046 responses
PARTNER PERFORMANCE				
AVVALE				
Leads Identified	Opportunity Identified	Pending Leads	Pending Opportunity	Avg Response Time
690 49% of overall leads identified 339 responses 1069 alerts sent	\$950K	135 45% of overall pending leads	\$90K	.5 days 339 responses
NAGARRO				
Leads Identified 🏆	Opportunity Identified	Pending Leads	Pending Opportunity	Avg Response Time 🏆
705 51% of overall leads identified 708 responses 1058 alerts sent	\$1.52M	20 5% of overall pending leads	\$237K	1.3 days 708 responses
TOP INDIVIDUAL PERFORMERS				
TOP PERFORMERS BY RESPONSE TIME				
Jim Sales (Nagarro)	Jill Sales (Nagarro)	Agatha Sales (Avvale)		
.3 days .9 days faster than average	.4 days .8 days faster than average	2.5 days 1.3 days slower than average		

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.



Q&A





# Thank you!

***Let's meet:***  
[etrigue.com/demo](https://etrigue.com/demo)

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