

KnowledgeNet

Advanced outbound intelligence

PLAYBOOK · 2026 EDITION

Turn buyer signals into pipeline without more reps.

A practical guide to running AI Engage™ across triage, segmented outreach, and trade show follow-up. Built for revenue teams that want consistent results.

57%

YoY new account growth

BCW

85%

Less manual prospecting work

AVERAGE

2 wks

Time to first live workflow

TYPICAL

INTRODUCTION

Why most outbound stalls, and what changes with AI Engage™.

Most revenue teams already sit on more buyer signals than they can use. CRM activity, site visits, intent data, partner referrals, conference scans, and inbound forms all flow in. The gap is rarely data. The gap is consistent execution against the right accounts at the right time.

AI Engage™ closes that gap. It triages signals, segments accounts, drafts outreach in your voice, and hands cleanly off to your reps. This playbook walks through the five pillars that make it work and the plays you can run in the first 30 days.

Who this is for

B2B revenue leaders running outbound at scale. CROs, VPs of Sales and Marketing, RevOps, and SDR managers who need cleaner signals, faster follow-up, and a clearer path to pipeline.

What is inside

- 01 The signal-to-pipeline gap
- 02 The five pillars of AI Engage™
- 03 Web Traffic Triage in practice
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- 05 Trade show and event follow-up
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- 08 Your first 30 days with AI Engage™

CHAPTER 01

The signal-to-pipeline gap costs more than most teams admit.

Pipeline does not slow down because of bad data. It slows down because signals never translate into focused execution. Reps default to whoever is loudest. Marketing campaigns land on cold accounts. The hottest visitors leave before anyone reaches out.

5x

Pipeline lift from focused outbound execution

85%

Reduction in manual prospecting work per rep

<2 wks

From kickoff to first live workflow in market

Symptoms you see

- Reply rates flat despite more activity.
- Reps cherry pick the same 30 accounts every quarter.
- Hot website visitors go untouched for days.
- Trade show scans sit in a spreadsheet for a month.
- Forecasts swing because pipeline is not repeatable.

Root cause

Signals are scattered across tools, segmentation is manual, and reps have no system that tells them which account to work, with what message, and when. Without a connective layer the volume of signals becomes noise.

What changes with AI Engage™

Signals become a ranked queue. Segments become messages. Messages become meetings.

CHAPTER 02

The five pillars that make AI Engage™ work end to end.

Each pillar solves a specific failure mode. Together they form one continuous loop from signal to meeting to closed revenue.

1

ICP enrichment

Build a living definition of fit using firmographics, technographics, and signal velocity. Every account is scored against your real won deals, not a guess.

2

Web Traffic Triage

Identify the companies on your site, route hot visitors to the right rep, and trigger outreach that references real intent in the first line.

3

Relationship Intelligence

Surface warm paths through your team, your investors, and your customers. Replace cold introductions with credible ones.

4

Segmented outreach

Generate persona-aware messaging that sounds like your team wrote it. Different segments, different value props, one operating model.

5

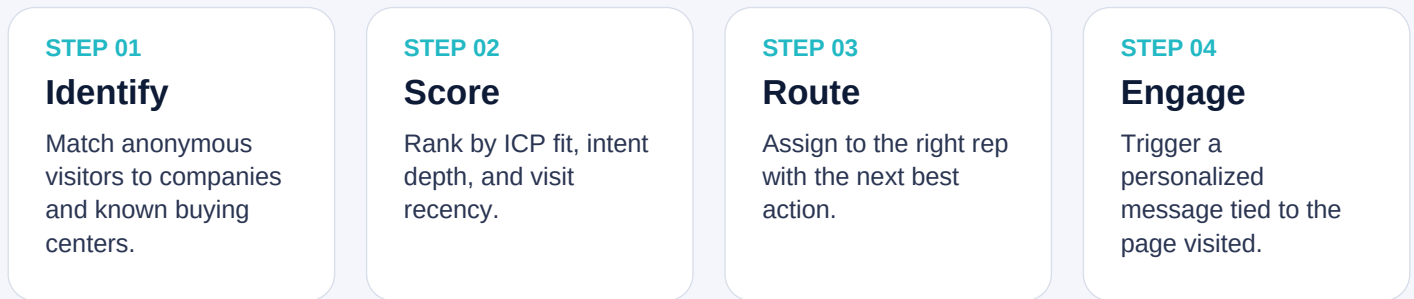
Human-in-the-loop control

Reps approve, edit, and learn from every send. The system gets sharper week by week without losing the human voice.

CHAPTER 03

Web Traffic Triage in practice.

Most teams know which companies visit their site. Very few act on it within the window that matters. Web Traffic Triage closes that gap by routing hot accounts to the right rep with context they can use in the first sentence of an outbound message.



PLAY OF THE WEEK

Hot visitor, no form fill, no problem.

Trigger when an ICP-fit account visits a pricing or product page twice in seven days without submitting a form. Route to the named account owner if one exists, otherwise to the AE pool.

3x

Reply rate vs cold list

48h

Average time to first touch

28%

Visit-to-meeting conversion

CHAPTER 04

Segmented outreach that does not sound like a template.

Templates fail because every recipient gets the same value proposition. Segmented outreach with AI Engage™ generates persona-aware messaging that mirrors how your best reps already write. Different segments get different value props with the same operating model behind them.

DO What good looks like

- **Open with their reality.**
Reference a recent move, hire, or signal that proves you actually looked.
- **Lead with a problem, not a feature.**
Anchor the message in a known pain for that segment.
- **Offer one specific next step.**
A 20 minute teardown beats a 'quick chat'.
- **Match cadence to intent.**
Three crisp touches for hot, lighter cadence for warming.

AVOID What kills reply rate

- **Generic opening lines.**
If it could be sent to anyone, it will be ignored by everyone.
- **Three asks in one email.**
Pick one. Save the others for later in the sequence.
- **Volume without segmentation.**
More sends will not save a wrong message.
- **Hidden human review.**
If reps cannot edit and learn, the model never gets sharper.

CHAPTER 05

Trade show and event follow-up that actually converts.

Most event leads go cold inside a week. The reason is simple. The list lands in a spreadsheet, gets uploaded to the CRM, and then waits for a rep to find time. AI Engage™ compresses that into hours, not weeks, with segmented follow-up tied to booth conversations.

DAY 0**Capture**

Scan or upload booth list. Match to ICP and existing accounts.

DAY 1**Triage**

Tier into hot, warm, and nurture. Route to owners.

DAY 2**Engage**

Personalized first touch referencing the booth conversation.

DAY 7**Convert**

Targeted second touch with a clear meeting offer.

DAY 14**Recycle**

Cold leads enter long-cycle nurture, reps focus on movers.

OUTCOME

Event lists become sourced pipeline, not stale spreadsheets.

Teams running this play see meeting bookings inside the first 14 days post-event, with consistent attribution from booth scan to closed revenue.

CHAPTER 06

Measure what actually moves pipeline.

Activity metrics like dials and emails sent are easy to measure and easy to inflate. The metrics below tell you whether AI Engage™ is producing real lift. Track them weekly and review them monthly with sales and marketing in the same room.

CONNECTION RATE**8% → 22%**

% of contacted accounts that reply or take a meeting.

TIME TO FIRST TOUCH**5 days → 4 hours**

Median time from signal trigger to outbound send.

MEETINGS PER REP PER WEEK**2 → 6**

Quality-controlled meetings, not just calendar slots.

PIPELINE SOURCED**1.0× → 5.0×**

Net new pipeline attributable to AI Engage™ workflows.

MANUAL PREP HOURS PER REP**12 → 2**

Hours per week spent on research and list building.

WIN RATE ON SOURCED OPPS**+18 pts**

Whether the right accounts are entering pipeline.

CUSTOMER OUTCOME · BCW

BCW grew new accounts 57% YoY

How a global communications agency replaced ad hoc prospecting with AI Engage™ for triage, segmented outreach, and trade show traffic.

57%

YoY growth in new accounts

3x

Increase in qualified meetings

2 wks

From kickoff to live

CHALLENGE

BCW had strong inbound but inconsistent outbound. Reps could not tell which accounts to focus on, and trade show leads cooled before follow-up.

APPROACH

AI Engage™ was deployed across triage, segmented outreach, and event follow-up. Reps kept full editorial control with human-in-the-loop review.

RESULT

Within two quarters BCW grew new accounts 57% YoY, tripled qualified meetings, and built a repeatable motion across regions.

“

AI Engage™ gave our teams a consistent way to turn signals into focused outreach. It is the first system that made our outbound feel intentional at scale.

Revenue leadership, BCW

CHAPTER 08

Your first 30 days with AI Engage™.

Use this rollout sequence to get to a live workflow inside two weeks and a measurable lift inside 30 days. Each week builds on the last so reps stay in flow and leadership sees compounding results.

WEEK 1**Foundations**

- Connect CRM and signal sources.
- Confirm ICP definition against won deals.
- Choose first segment and persona.

WEEK 2**First live workflow**

- Launch Web Traffic Triage for ICP visitors.
- Reps approve first wave of personalized sends.
- Daily standup on responses for tuning.

WEEK 3**Expand and tune**

- Add a second segment with its own value prop.
- Layer in trade show or event follow-up.
- Refine routing rules based on rep feedback.

WEEK 4**Prove the lift**

- Compare reply rate, meetings, pipeline week over week.
- Decide which workflows scale to the next region.
- Lock in the operating cadence for ongoing review.

READY TO TRANSFORM

From insights to consistent impact.

Stop leaving revenue on the table. Let AI Engage™ bridge the gap between your sales strategy and real results.

READY TO TALK

Book a strategy call

A 30 minute working session to map signals to pipeline plays for your team.

knowledgenet.ai → [Book a strategy call](#)

NEED THE BUSINESS CASE

Calculate missed pipeline

Run the Revenue Calculator and get a personalized estimate of recoverable pipeline in minutes.

knowledgenet.ai/revenue-calculator

Live in under 2 weeks · No developer needed · Works with your CRM · Onboarding included