



AI Agents: 10+ Use Cases Transforming GTM

Explore 10+ AI agent workflows helping GTM teams to create content, evaluate customer health, and get insights faster than ever.

The Secure, No-Code AI Platform for GTM

GTM teams run on speed and volume: researching accounts, qualifying leads, personalizing outreach, building campaign content, answering RFPs, and keeping CRM data clean. Most of that work means pulling information from scattered tools and repeating the same manual steps, which slows pipeline and buries reps and marketers in busywork.

StackAI, the governed, secure, hybrid-cloud or on-prem AI orchestration platform, lets GTM teams automate that work without writing code. AI agents handle account research, lead enrichment and scoring, competitive intel, content drafts, and RFP responses, all grounded in your actual data with citation-backed accuracy. Built-in governance, access control, and auditability mean brand, legal, and security stay protected while the team moves faster. The result: more pipeline coverage, faster follow-up, consistent messaging, and reps spending their time selling instead of searching.

What are AI Agents?

Unlike static chatbots or rigid automation tools, AI agents can securely work across your CRM, marketing platforms, call recordings, content libraries, and internal knowledge bases inside a governed, auditable environment. They research prospects, draft personalized outreach, summarize calls, update records, flag at-risk deals, and generate content aligned with your brand and positioning.

AI agents don't replace marketers, SDRs, or sellers. They take the repetitive research and data work off their plates so every rep operates with the context of your best one. In practice that means faster speed to lead, higher-quality personalization at scale, cleaner pipeline data, and a GTM motion that grows without adding headcount.



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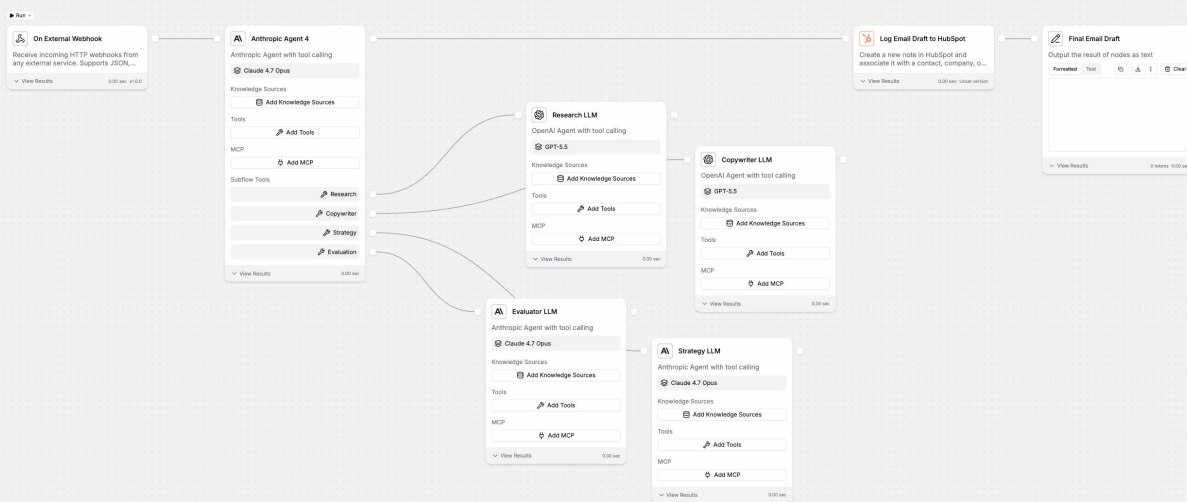
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Personalized Outbound

Generic outbound messages get ignored. Personalized ones convert, but personalization at scale requires research time most teams don't have.

This outbound generator researches every prospect, matches their ICP and brand voice, customizes the source template, and pushes the result directly to HubSpot.

Who It's For	B2B Marketing, Account-Based Marketing Teams
Results	• Every prospect gets researched, ICP-aware outbound, not a templated blast • Direct CRM integration — messages land in HubSpot ready to send
Workflow	1. New prospect data triggers the workflow 2. A Client Researcher LLM fires; Messaging Strategist LLM picks the angle and CTA; Template Customizer LLM writes the email 3. Output is pushed to HubSpot

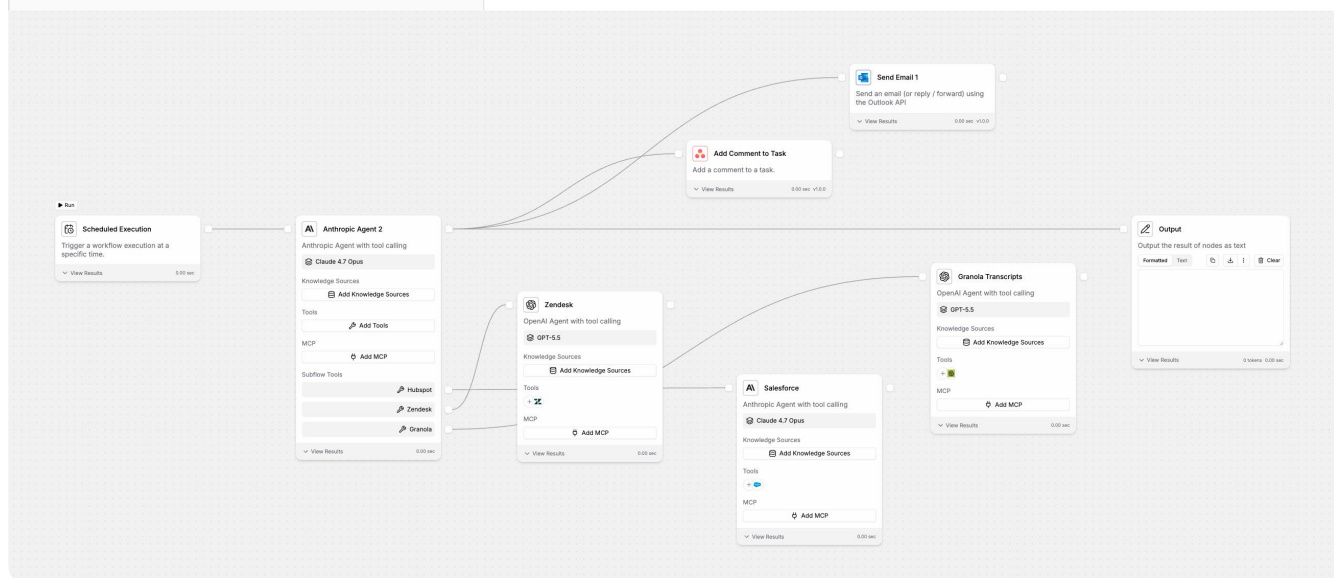


Churn Risk & Customer/Business Health

By the time a CSM notices an account is at risk, the renewal conversation is already lost — health signals are scattered across a dozen tools.

This churn agent transforms scheduled or event-based triggers into a full 360° account diagnosis, pulling data from every customer touchpoint via specialized sub-agents.

Who It's For	Revenue Marketing, RevOps Teams
Results	• Consolidates signals across CRM, support, and meetings into a single risk score with reasoning • Generates CSM-ready briefs with recommended save-plays for every flagged account
Workflow	1. Scheduled trigger fires planner LLM. Dispatches sub-agents in parallel: Salesforce, Granola, IT/Zendesk 2. Reasoning LLM synthesizes all signals into a risk score, root-cause summary, and recommended action 3. Emails brief and creates follow-up task in Asana

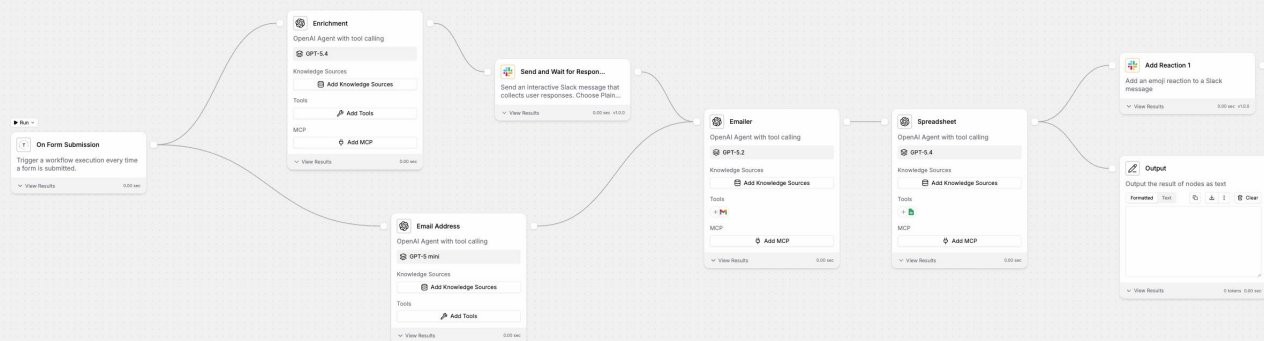


Inbound Triage & Response

Speed-to-lead is the #1 predictor of conversion, but most forms and partner inquiries wait hours or days before a human sees them.

This triage system processes every inbound the moment it arrives — researching, qualifying, drafting a response, and routing to the right team in seconds.

Who It's For	Demand Gen, Partner Marketing Teams
Results	• Cuts speed-to-lead from hours to seconds • Eliminates manual qualification and routing time • Captures inbound opportunities outside business hours and across time zones
Workflow	1. An email or webhook trigger fires when an inbound or form arrives 2. An LLM extracts and qualifies the lead, RFP, or inquiry based on a knowledge base of ICP 3. A specialist LLM drafts a personalized response 4. Output is routed to the right team via CRM, email, or Slack — with the draft ready to send

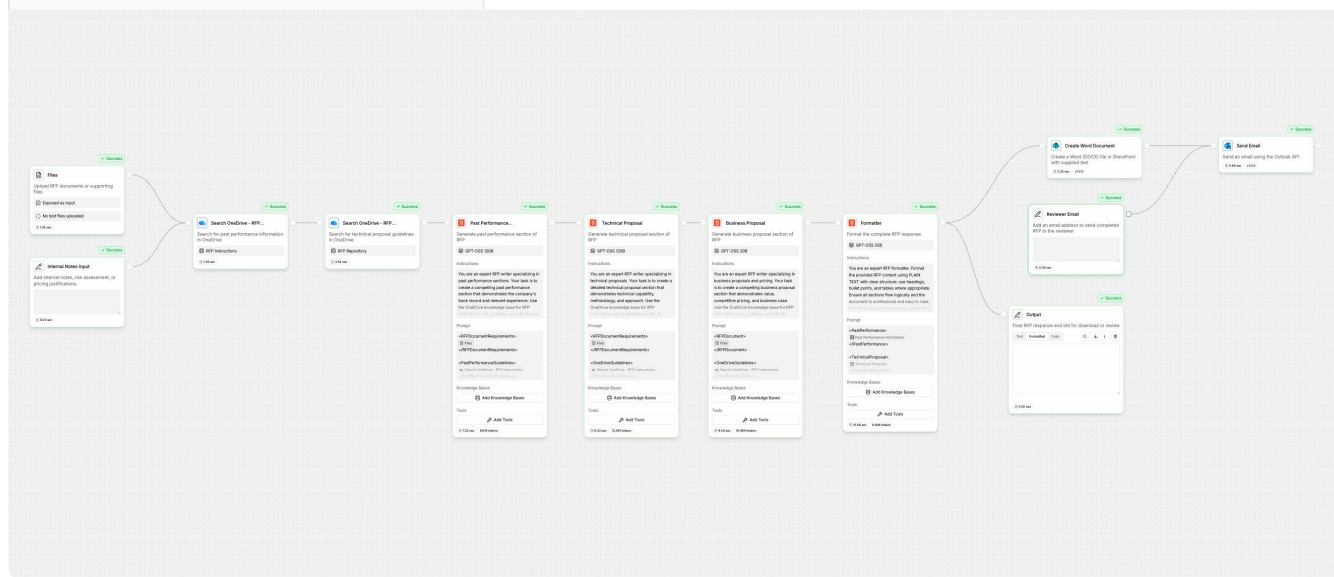


RFP Drafter Agent

Creating comprehensive RFP responses is time-consuming and requires coordination across multiple teams and knowledge sources to ensure completion.

This agent transforms uploaded RFP documents and internal notes into complete, professionally formatted proposals by leveraging organizational knowledge bases.

Who It's For	RFP/RFQ Writers, Proposal Managers
Results	• Reduces RFP response time from days to hours • Ensures consistency with organizational guidelines and past successful proposals • Automatically incorporates institutional knowledge from OneDrive repositories
Workflow	1. User provides RFP; workflow runs through several knowledge bases of instructions and content 2. Past performance, technical proposal, and business proposal sections are drafted 3. File created and sent to the reviewer via Outlook

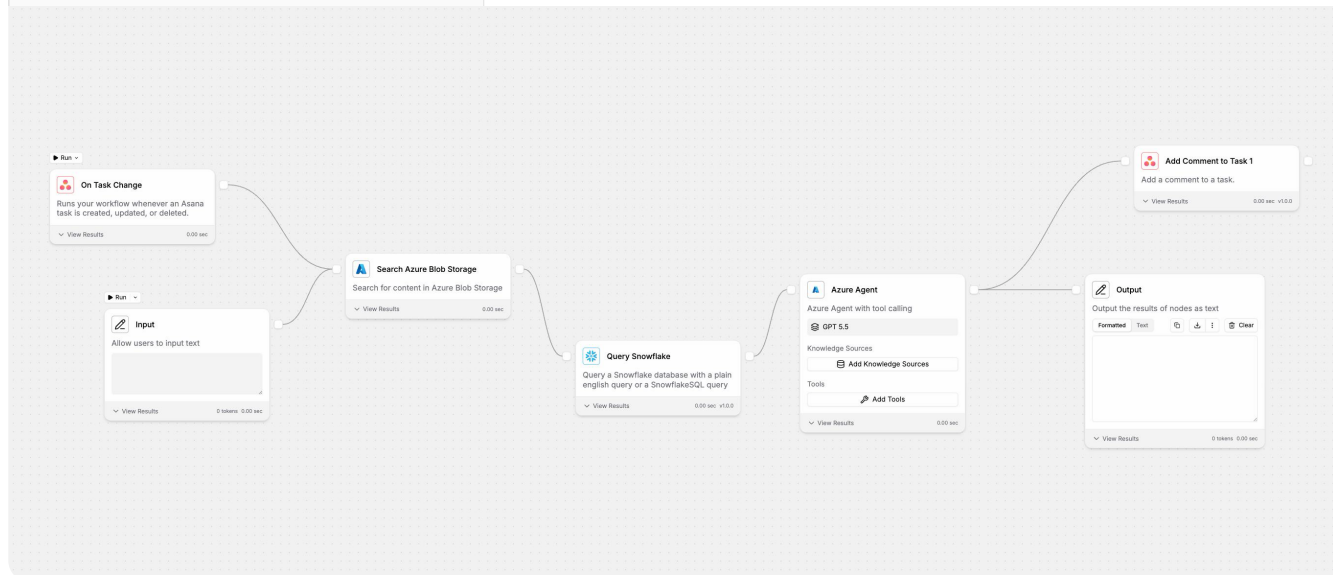


CRM Pipeline & Sales Analytics Chatbot

Answering a simple question like "which channel drove the most pipeline last quarter" usually means filing a ticket with the data team and waiting days.

This analytics agent connects directly to Snowflake, so GTM can ask questions in plain English and get accurate, query-backed answers in seconds, no SQL required.

Who It's For	Demand Gen, GTM Teams
Results	• Cuts ad-hoc reporting requests to the data team • Every answer is backed by a real Snowflake query and official definitions for MQL, Pipeline, etc.
Workflow	1. Marketer asks a question in natural language (e.g. "compare MQL-to-SQL conversion by channel") 2. The agent translates it into SQL using your semantic model 3. Output is a clear answer with supporting tables and charts, plus the query attached for auditability

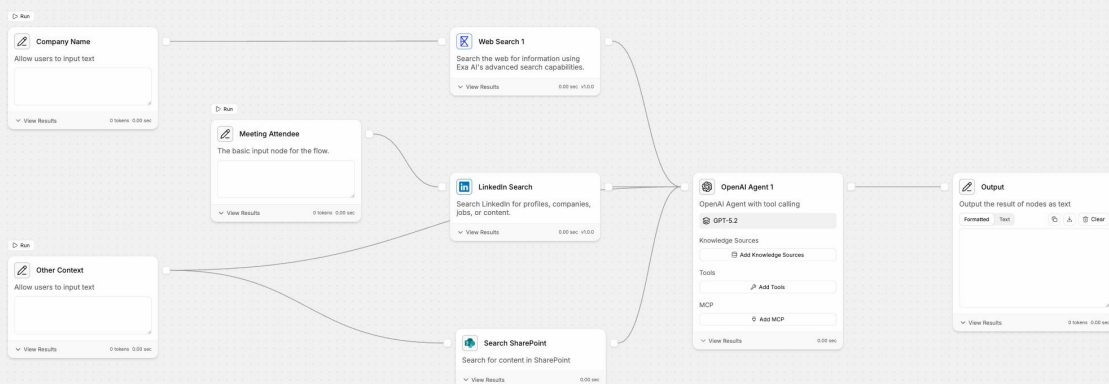


Meeting Prep Agent

Executives and AEs walk into meetings cold because assembling notes and account news into a prep email is manual.

This triage system processes every inbound the moment it arrives — researching, qualifying, drafting a response, and routing to the right team in seconds.

Who It's For	Demand Gen, Partner Marketing Teams
Results	• Shifts meetings from cold-start to context-rich • Drafts an explicit agenda along with the prep email • Removes the prep burden from the executive
Workflow	1. Intakes attendee list, company name, and any other context 2. Runs simultaneous web, LinkedIn, and SharePoint searches 3. Draft the prep email with an explicit agenda, talking points, and suggested questions 4. Sends ahead of the meeting



AI Agents for GTM

Use Case 11: Website Visitor Chatbot	Problem: Top-of-funnel visitors with product, pricing, or support questions often bounce without an immediate answer. Solution: The agent handles routine product, pricing, and support questions automatically, and routes out-of-scope questions.
Use Case 12: New Product Onboarding Data Lookup	Problem: Looking up weight, dimensions, HTS/export codes, and lead times for weekly new products across vendor sheets is tedious manual work. Solution: The agent looks up specs and classifications across vendor sheets and public databases, and writes the structured record back to the catalog.
Use Case 13: Voice-of-Customer Agent	Problem: Customer sentiment is scattered across G2, app stores, support tickets, and social, so messaging drifts from the language customers actually use. Solution: The agent aggregates reviews, calls, and social mentions, clusters recurring themes, and delivers a weekly VoC digest.
Use Case 14: SOW Drafting Agent	Problem: Every agency or freelancer engagement needs a statement of work, and marketers rebuild them from scratch — chasing scope details, rate cards, and legal-approved language. Solution: The agent drafts SOWs from a campaign brief using pre-approved templates, terms, and pricing structures, then routes them to legal and procurement for sign-off.
Use Case 16: Partner & Sponsorship Scout Agent	Problem: Finding the right sponsorships, and field opportunities means hours of manual searching, and promising fits get missed. Solution: The agent continuously scans for events, communities, and complementary brands matching your ICP and region, scores each on audience overlap and cost, and delivers a ranked shortlist.

The use cases in this white paper are just the beginning. With StackAI's drag-and-drop interface, secure infrastructure, and 100+ integrations, anyone can build production-ready AI agents in just a few clicks.



Let's Build AI Agents
for GTM, Together

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