ROUND INFINITY

FOR BUSINESS DEVELOPMENT, SDR TEAMS AND REVENUE OPERATIONS

Move your prospecting to agentic.

AI agents find the accounts that fit, research every contact, write every message from real signals and handle every reply. Your sellers walk into qualified meetings.

01 **More relevant outreach**

02 **Faster response to intent**

03 **Better handoffs**



From manual to agentic.

TODAY		WITH ROUND INFINITY
Lists bought, then blasted	→	Accounts that match your ideal customer, with the reason each fits
One template for every prospect	→	Every message written from real signals, in your voice
Replies sit unread for days	→	Replies sorted and answered while interest is fresh
Sellers start calls cold	→	A summary of the account and conversation before every call



One prospect, signal to meeting.

Prospecting in five steps. An app holds the work, an AI agent does it, and people decide where it matters.

01 TARGET

Define who to target and how to sound

AI AGENT

Account Discovery

Finds accounts that fit your ideal customer and says why.

APP Audience Builder

PEOPLE Sales leaders set the profile and voice.

→

02 RESEARCH

Find and enrich the right accounts and contacts

AI AGENT

Research & Personalization

Researches each contact for real signals: news, hiring, funding.

APP Enrichment

PEOPLE SDRs review priority accounts.

→

03 WRITE

Write a personal message for every prospect

AI AGENT

Research & Personalization

Writes every message from those signals, in your voice.

APP Sequences

PEOPLE Nothing generic goes out.

→

04 ENGAGE

Run outreach and handle every reply

AI AGENT

Outreach · Response Management

Runs every channel within limits; answers replies; honours opt-outs.

APP Sequences · Unified Inbox

PEOPLE SDRs take the conversations that need them.

→

05 HAND OFF

Book qualified meetings for sales

AI AGENT

Qualification · Handoff

Qualifies, books the meeting and briefs the seller.

APP Meeting Booking · Lead Handoff

PEOPLE Account executives run the meeting.

03 HAND OFF

Every meeting, briefed.

When a prospect books, the Handoff agent writes the seller a one-page brief and creates the opportunity, so the first call starts where the conversation left off.

- Why this account fits
- Signals that started it
- What they said
- Qualification
- Suggested agenda

POWERED BY

USE CASE — Lead Handoff · Handoff agent

+ WORKS WITH — Sales Execution

PREPARED BY AI AGENT

Illustrative

Meeting · Halden Logistics

Booked by reply · Thursday 15:00 · VP Operations

FIT	520 staff, 3 warehouses, growing in the south
SIGNAL	Hiring 14 dispatchers; new site announced
SAID	“Customer updates are all manual today”
QUALIFIED	Budget this year · decision with the COO

SUGGESTED AGENDA

Start from the new site and dispatcher hiring

Show customer updates by WhatsApp in a live demo

Six prospecting agents. Each with a partner.

AGENT 01

Account Discovery

Finds companies that match your ideal customer and explains why.

+ Build Your Own

AGENT 02

Research & Personalization

Researches each contact and writes from real signals.

+ KYC & Onboarding

AGENT 03

Outreach Orchestration

Runs multi-channel sequences within limits; adapts timing.

+ Service

AGENT 04

Response Management

Classifies replies, answers approved questions, honours opt-outs.

+ Service

AGENT 05

Intent & Qualification

Qualifies in conversation and books the meeting.

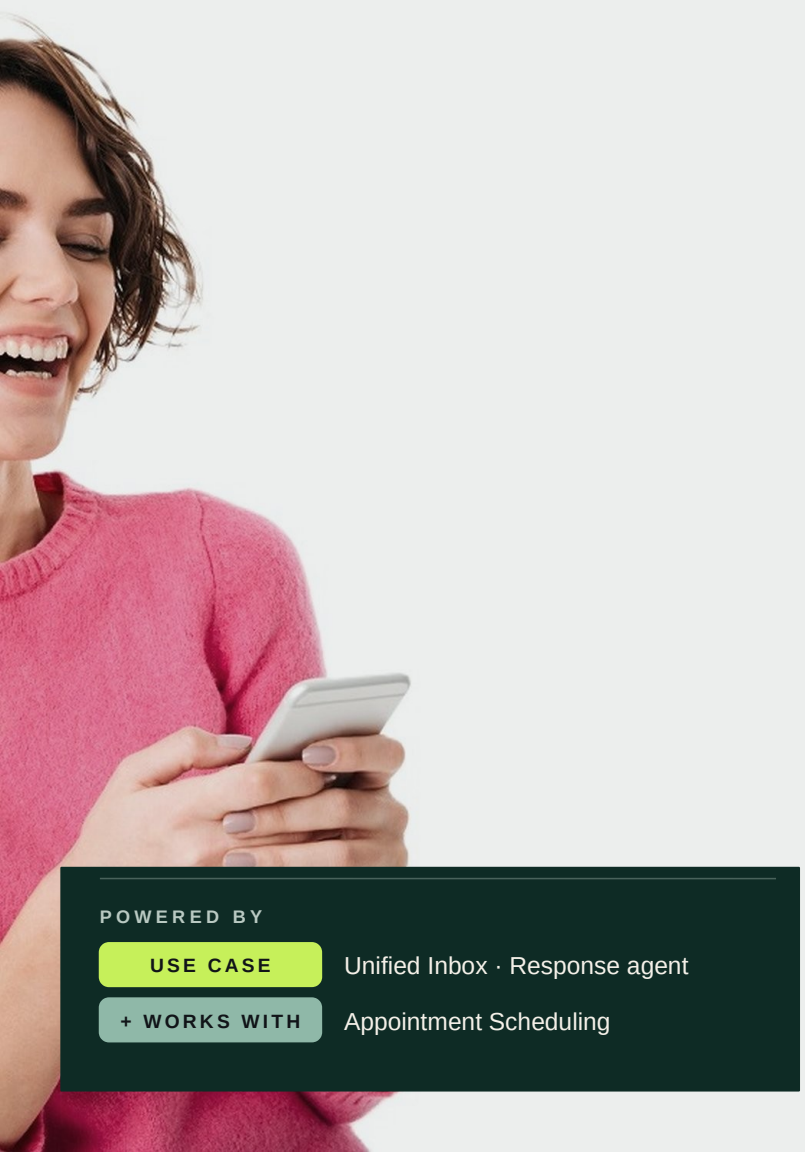
+ Appointment Scheduling

AGENT 06

Handoff

Briefs the seller and creates the CRM opportunity.

+ Sales Execution



POWERED BY

USE CASE — Unified Inbox · Response agent

+ WORKS WITH — Appointment Scheduling

05 ENGAGE & REPLY

Outreach, in the open.

Every message has a reason. Every reply gets an answer. Every opt-out is honoured at once.

ACTIVITY · HALDEN LOGISTICS · VP OPERATIONS — *Illustrative*

Mon	AGENT	Signal found: 14 dispatcher roles posted
Mon	AGENT	Email sent, written from the hiring signal
Wed	AGENT	LinkedIn note referencing the new site
Thu	PROSPECT	“Interesting. How does it work with our TMS?”
Thu	AGENT	Answered from approved content · offered times
Thu	PROSPECT	Picked Thursday 15:00
Thu	AGENT	Meeting booked · brief sent to the account executive

Personal at scale. Never careless.



Consent

Opt-outs and suppression lists are honoured straight away, on every channel. Consent and lawful basis are recorded per contact.

POWERED BY

USE CASE — Sequences · Outreach agent

+ WORKS WITH — KYC & Onboarding

Content

Messages are written from approved positioning in your voice. Answers to prospects' questions come only from approved content.

POWERED BY

USE CASE — Unified Inbox · Response agent

+ WORKS WITH — Service

07 THE USE CASE

Six applications, built for prospecting.

Audience Builder
Ideal customer profiles, lists, exclusions

Enrichment
Firmographics, contacts, signals

Sequences
Multi-channel cadences, A/B tests

Unified Inbox
Replies across channels

Meeting Booking
Calendars and round-robin

Lead Handoff
Qualified leads with history to CRM



Works with the rest of your operation.

Connected use cases share the record and the audit trail. Industry packs add sector depth on top.

WORKS WITH

Sales Execution

Meetings become opportunities, quotes and contracts.

WORKS WITH

Appointment Scheduling

Meetings booked inside the conversation.

WORKS WITH

Service

Inbound questions answered on any channel.

WORKS WITH

Online & In-Store Sales

Consumer leads converted to orders.

INDUSTRY PACKS

Banking

Business banking and SME acquisition.

INDUSTRY PACKS

Insurance

Commercial and broker prospecting.

INDUSTRY PACKS

Real Estate Development

Buyer leads nurtured to site visits.

INDUSTRY PACKS

Wealth & Brokerage

Households engaged on life events.

Tracked from request to done.

WORKFLOWS

Outbound sequence	Target to meeting
Inbound lead response	Answered within minutes
Event follow-up	Attendees contacted and qualified
Re-engage closed-lost	Past opportunities revived
Opt-out and compliance	Consent and suppression
Account-based play	Several contacts, one account

DASHBOARDS



Reply and meeting rates

By sequence and persona



Pipeline sourced

Meetings to opportunities



Channel performance

Email, LinkedIn, WhatsApp, voice

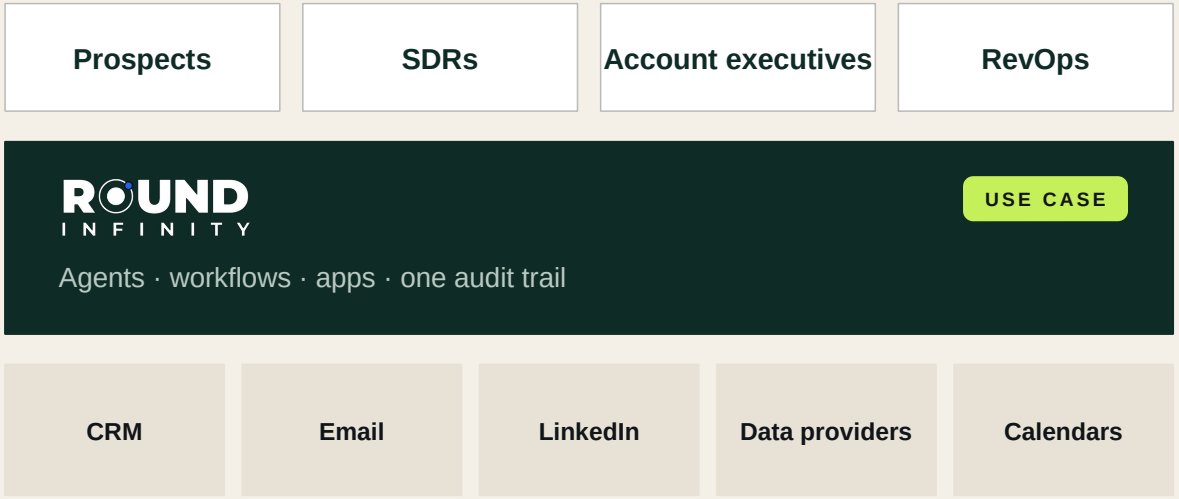


Deliverability

Bounces and spam signals

Works alongside your CRM.

Accounts and opportunities stay in your CRM. Round Infinity runs targeting, research, outreach and handoff around it.



Your systems of record stay where they are

INCLUDED WITH EVERY SUBSCRIPTION

- AI Execution Engine
- AI Agent Builder
- Workflow Automation
- Customer 360
- Apps & Portals
- Integrations & APIs

Start with one use case. Add the rest.

Platform

Named users and the core platform

+

Prospecting

The apps, agents, workflows and dashboards in this overview

+

More use cases

Sales Execution · Appointment Scheduling · Service

+

Usage

AI, voice and messaging — pay as you use

One platform, one data model, one user set, one audit trail. Every use case you add shares all of it. Users are licensed once.

Price your operation → roundinfinity.com/pricing

ROUND INFINITY

NEXT STEP

See it run on your own market.

01	**Walkthrough**	Map your ideal customer and voice
02	**Demo**	See the agents research and write
03	**Quote**	Platform, use cases and usage, sized to you

Book a demo →

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