Spring ’25 Release Notes (v9.14)

April 2025

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Release Overview

This release is a significant step toward our goal of empowering sales teams with AI. A MaxAI extension package allows you to plug Agentforce (Salesforce's AI application) into Altify, unearthing important customer data in the drive toward building executive relationships, understanding customer challenges and goals, and planning for revenue growth. Future releases will maximize the applicability of Agentforce across Altify's products.

Integrations that maximize a sales team's potential is another key area of development for Altify. This release sees Altify harnessing ZoomInfo data in relationship maps, highlighting contacts who have left their companies and surfacing ZoomInfo data in relationship map custom panels. Similar integration and interoperability with other popular data applications are planned.

Customer feedback influenced our decision to deliver enhanced validation of insights with this release. The addition of a completion status for insight cards instantly allows you and your customer to see where value is realized and where further validation is required.

Sales leaders can now validate their account objectives by directly connecting them to specific insights from the account insight map. You can connect the dots for your customers by linking your opportunity solution with the goals they will help achieve, the initiatives they align with and the business pressures they will relieve.

Previously restricted to larger Account Manager plans, Test & Improve events can now be scheduled for account plans. Now, sellers, sales leadership, and other members of the revenue team can benefit from a regular cadence of asking questions, identifying weaknesses, and proposing recommendations: strengthening and honing account plans through consistent best practice.

Your single account plans can also now be integrated into existing partner portals with Salesforce's Partner Community Login licenses, providing a powerful solution that enables joint account planning, collaboration, and effective execution in the context of partner ecosystems. Partner sellers can access important Altify account plan data like buyer insights, relationship maps, and more. This enables greater collaboration between Altify enterprise customers and their channel partners.

MaxAI

A new extension package, MaxAI enables users to harness Salesforce's powerful AI tool Agentforce when they are working with insight maps, relationship maps or account details.

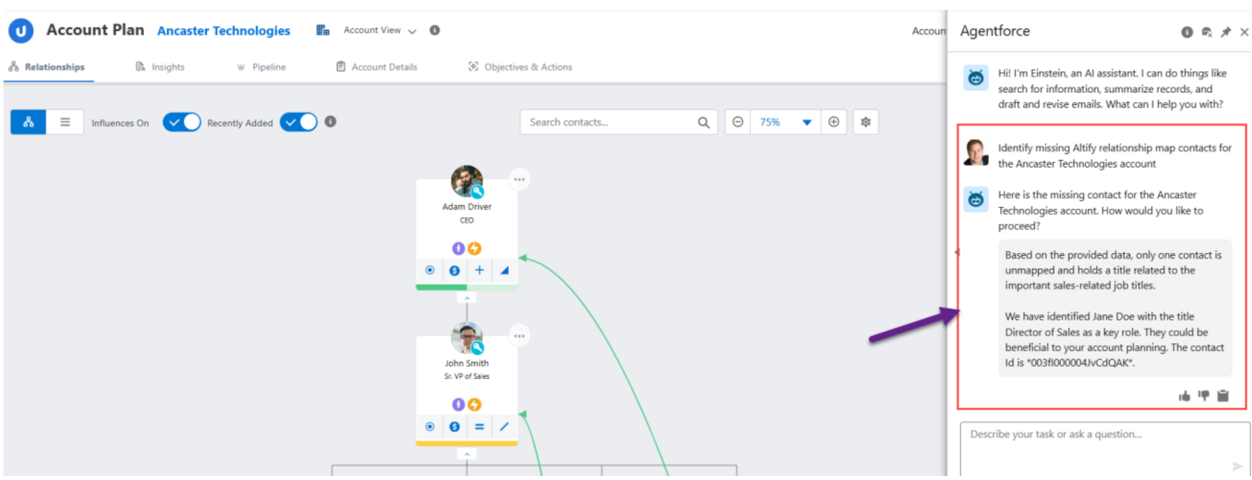
New user functionality

Populating Altify with Agentforce

With MaxAI installed, end users can seek assistance from Agentforce in three scenarios (click a link to view the relevant article in Altify online help):

- Populating account details in an account plan (or row details in an Account Manager)
- Populating an account insight map with goals, pressures and so on (for an account or opportunity insight map).
- Identifying relevant contacts and adding them to a relationship map (for an account or opportunity relationship map).

In the example shown below, Agentforce is assisting finding relevant contacts who are missing from an account relationship map.



New functionality to be administered

Installing and customizing MaxAI

MaxAI is an extension package that can be installed and enabled in minutes. For detailed guidance on each step, see Installing MaxAI in the Altify online help.

MaxAI can also be customized so that Agentforce's responses are more aligned with a customer's business processes. For more information, see Customizing MaxAI.

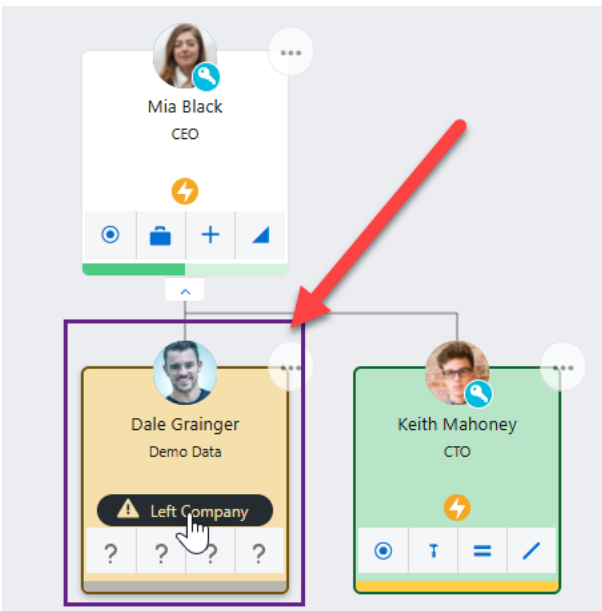
Relationship Map

New user functionality

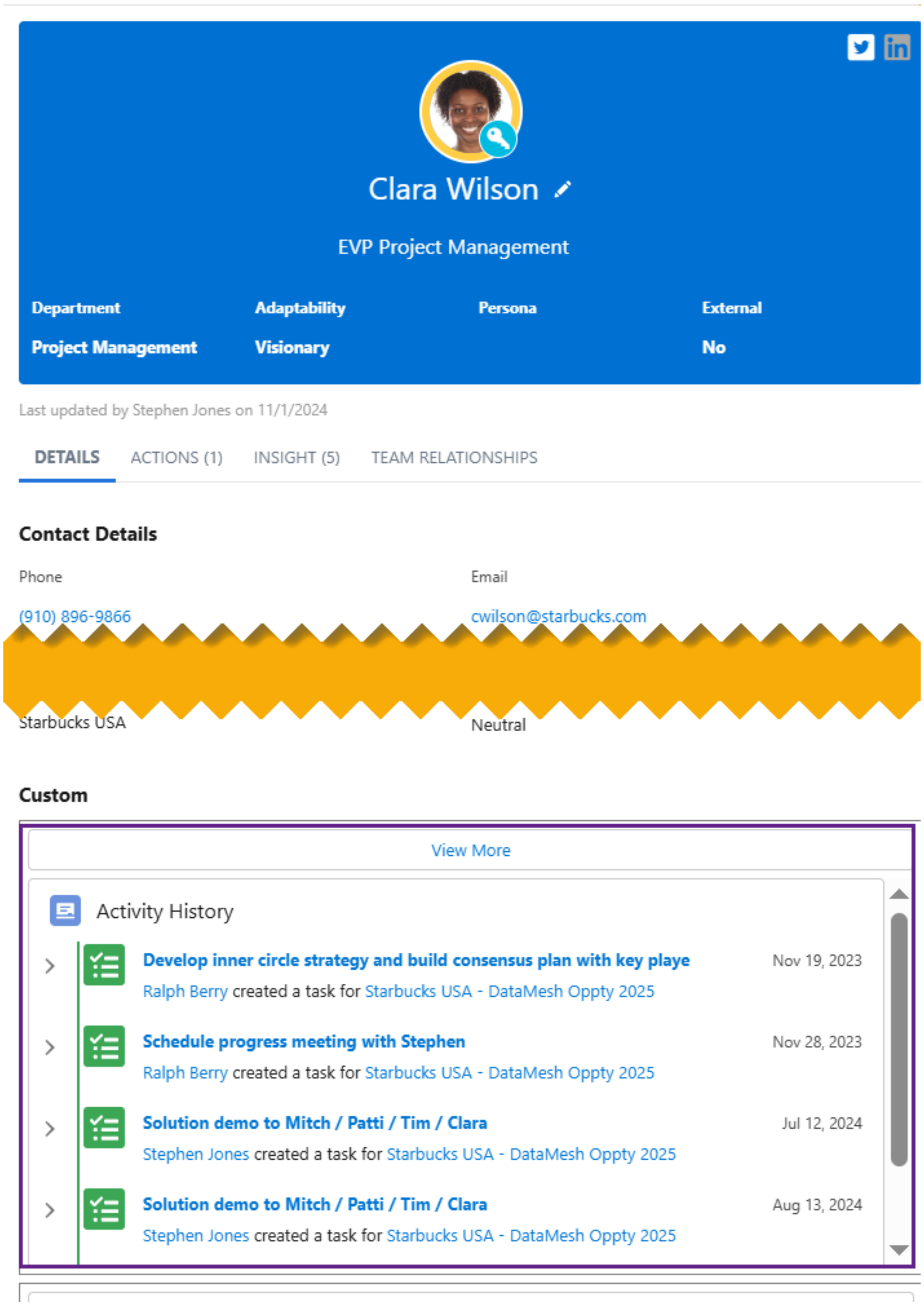
Harnessing ZoomInfo data on the relationship map

Additional data can now be accessed on the relationship map if ZoomInfo is integrated with the Salesforce org.

- If a contact has left their company, their contact card is flagged and highlighted in yellow on the map – as indicated in the example below.



- In 9.13, Altify introduced custom panels for relationship maps. In the use case shown below, where a contact's activity history is shown in the custom panel, activity data captured by ZoomInfo will also be included.



New functionality to be administered

Integrating with ZoomInfo

- To enable the flagging of contacts who have left the company, the Altify Relationships Setting *Contact has left Company Field* needs to be populated with a string field on the Contact record that indicates the contact has left the company (in ZoomInfo's case, this field is 'ZI Person Has Moved').

- To build a custom panel that displays the contact's activity history, see Adding Custom Panels to the Contact Information Panel in the Altify online help. (This process will involve requesting the relevant code from Altify Support).

Insight Map

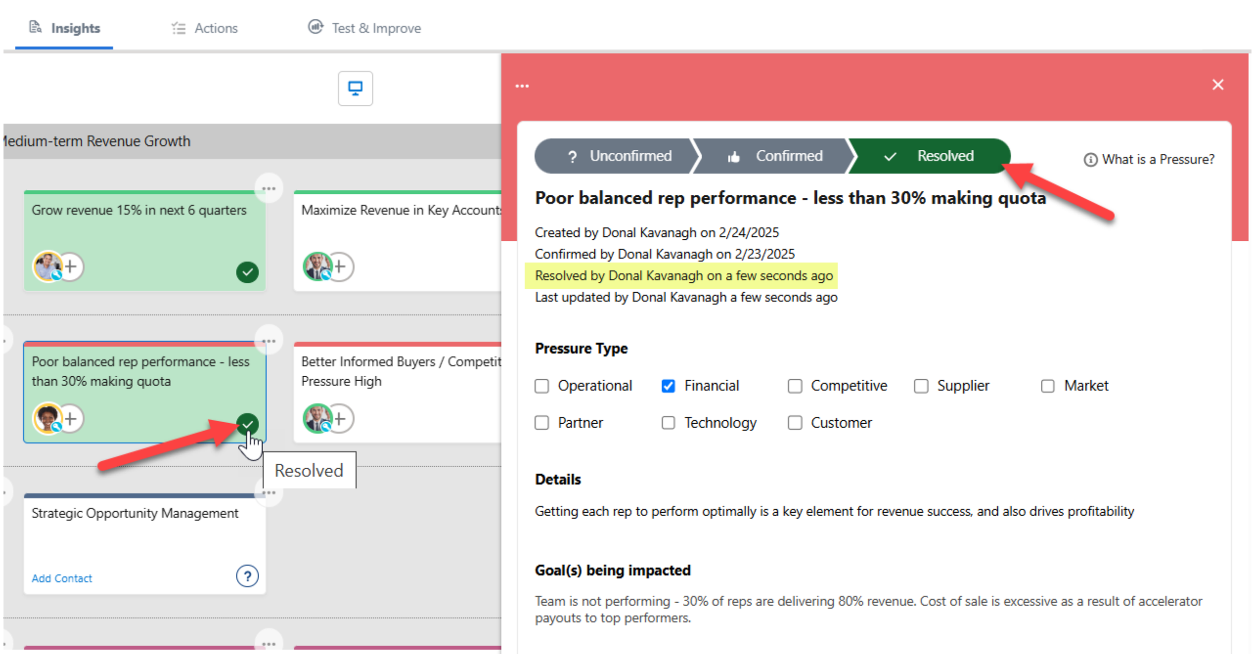
New user functionality

Enhanced insight validation

By default, an insight can be moved from 'Unconfirmed' to 'Confirmed' status. A third level of validation is now available as follows:

- Goal: 'Unconfirmed' → 'Confirmed' → 'Achieved'
- Pressure: 'Unconfirmed' → 'Confirmed' → 'Resolved'
- Initiative: 'Unconfirmed' → 'Confirmed' → 'Completed'
- Obstacle: 'Unconfirmed' → 'Confirmed' → 'Overcome'
- Solution: 'Unconfirmed' → 'Confirmed' → 'Implemented'

New status can be selected on the insight card or details panel (as indicated in the example below) and a validation message indicates when the status was assigned.



The new validation labels ('Achieved', 'Resolved', etc.) can be updated to better suit an organization's processes.

For further information, see Marking Insights as Completed in the Altify online help.

This functionality needs to be enabled by an administrator. For more information, see Enabling enhanced insight validation below.

New functionality to be administered

Enabling enhanced insight validation

A new custom setting enables users to validate insights beyond the 'Confirmed' status (goal 'Achieved', pressure 'Resolved', etc.)

The custom setting is *Enable Insight Map Validation* in Altify Insights Settings.

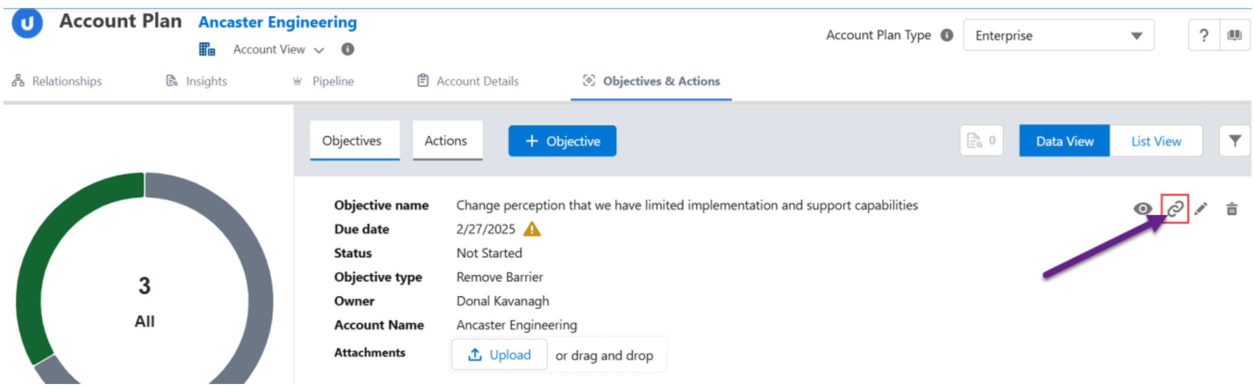
For more information on enabling and customizing insight validation, see the Altify online help for administrators.

Objectives & Actions [Account Manager]

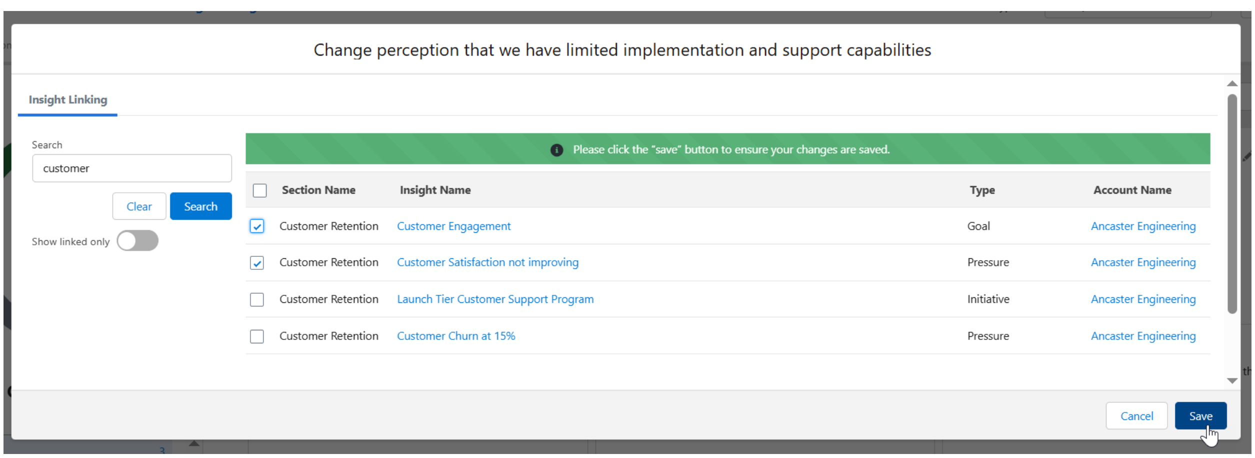
New user functionality

Objective-Insight linking

Link objectives to insights belonging to the same account. This can be performed in account plans (as shown in the example below) or Account Manager plans, via the icon indicated below.



The resulting dialog (shown in the example below) includes a search function and a toggle to only display the insights that are already linked with the objective.



For more information, see Linking Objectives and Insights in the Altify online help.

New functionality to be administered

Enable objective-insight linking

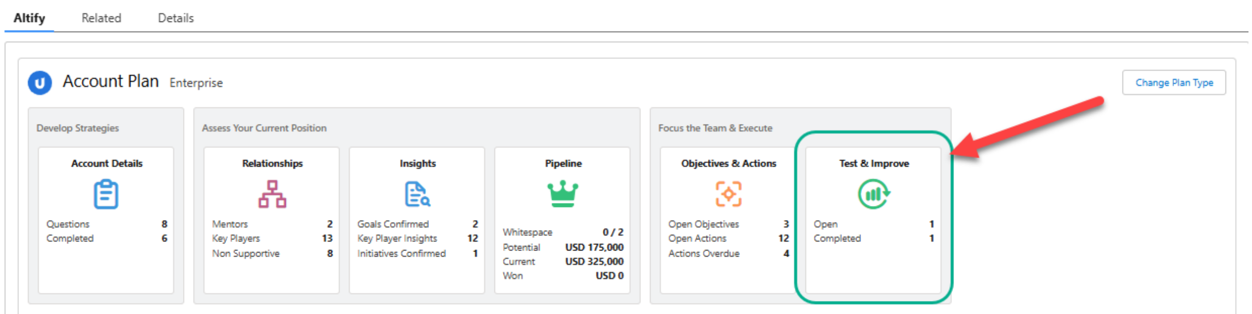
Objective-insight linking is not available by default. It can be activated by the following Altify Account Manager Setting: *Enable Objective-Insight Linking*.

Test & Improve

New user functionality

Test & Improves for account plans [Account Manager customers only]

Establish a best-practice meeting cadence for your Altify account plans with regular test & improve events. Test & improves for account plans are accessed via the Account Plan launchpad as indicated below.



These events allows the account owner to visually present the current state of play across all aspects of the account (Account Details, Relationships, Insights, Pipeline and Objectives & Actions) and for stakeholders to submit questions, gaps and recommendations which are subsequently summarized and reviewed for actionable outcomes.

Test & improve for Account Manager plans remain available for a higher level meeting cadence.

For more information, see Test & Improve in the Altify online help.

New functionality to be administered

Enabling test & improve access for account plans

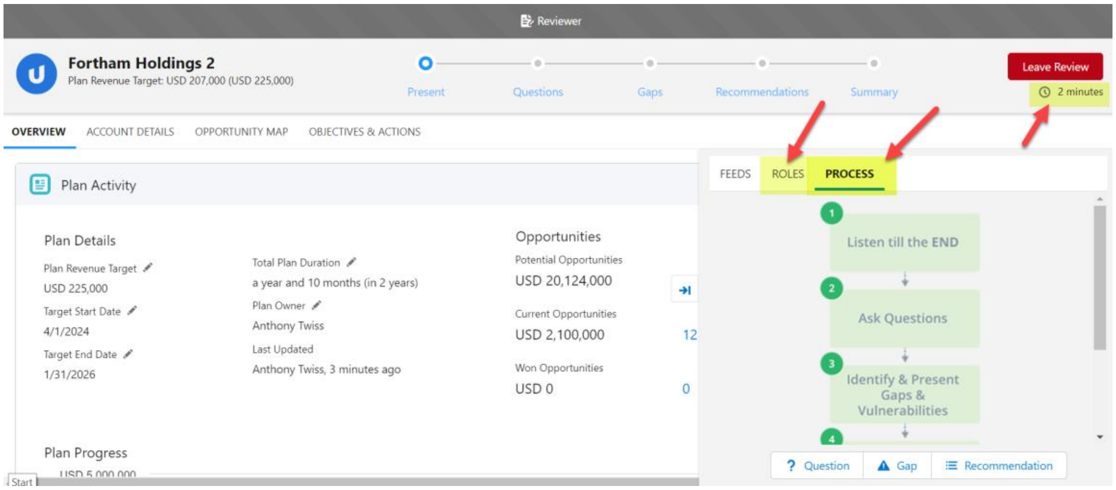
Test & Improve needs to be added to the tab list of relevant plan types for this feature to be made available on the Account Plan launchpad.

For more information, see Updating or Creating a Plan Type in the Altify online help.

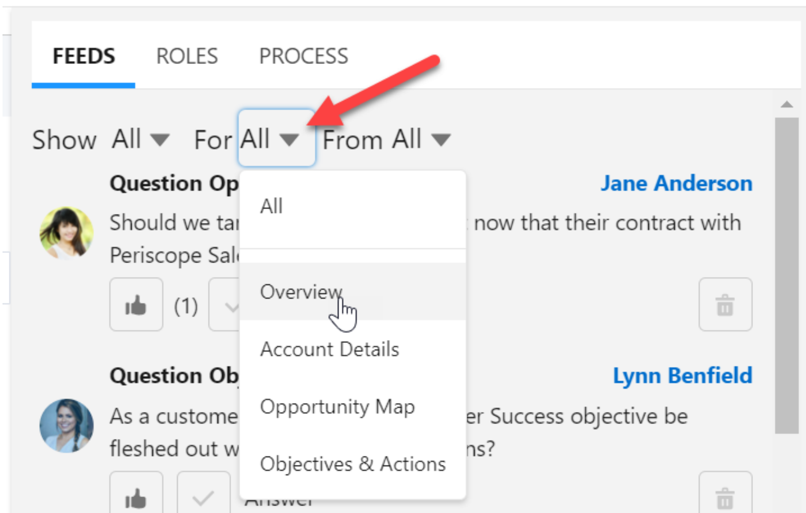
Deprecated functionality [Account Manager and Opportunity Manager]

The test & improve user interface is cleaner and easier to navigate with the removal of the following elements (following discussion with customers):

- Roles tab, Process tab and timer (all highlighted below in v9.13)



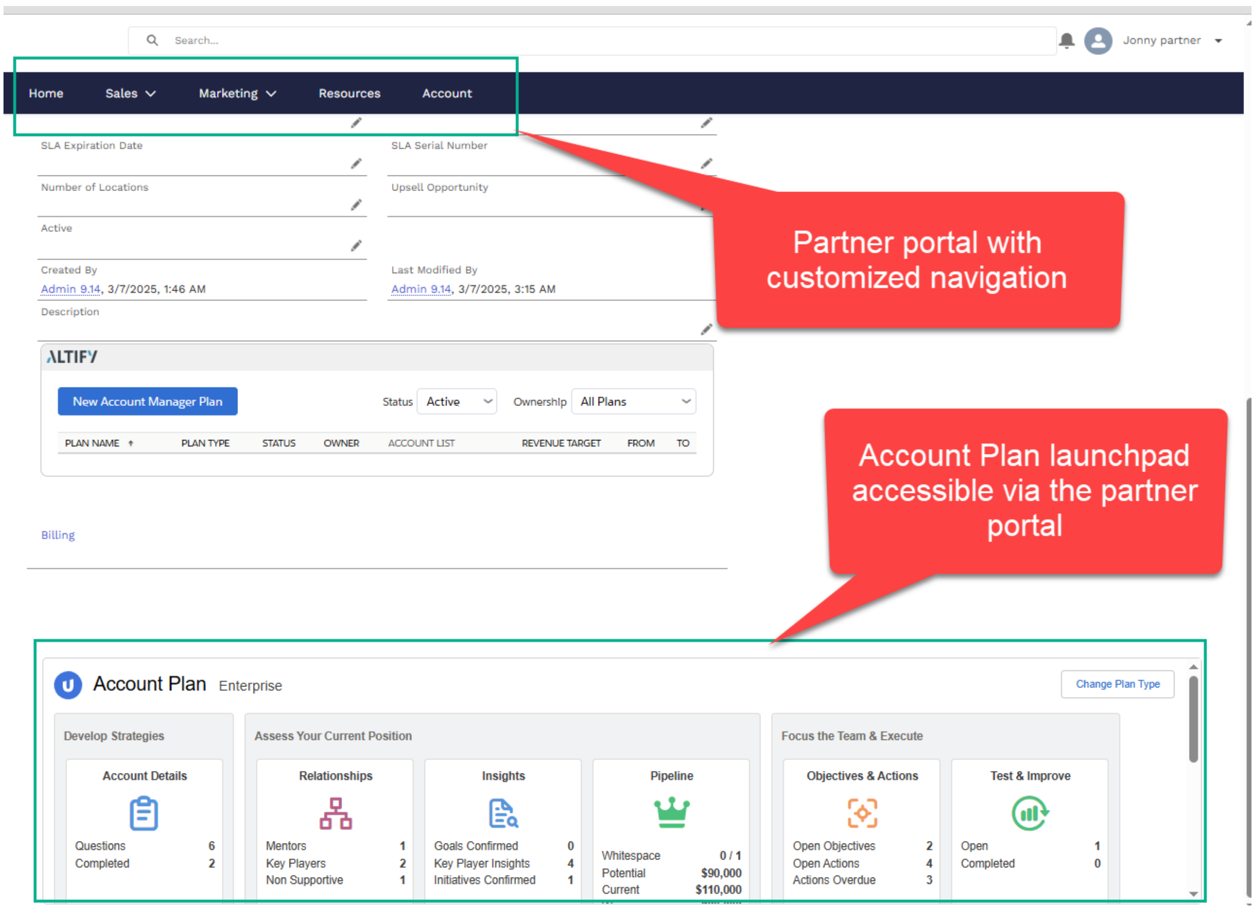
- The For filter when viewing reviewer comments (as highlighted below in v9.13).



Account Planning

Access for Partner Users

Partner users such as third party consultants or salespeople can now easily access account plans via the Account Plan launchpad on a partner portal (as shown in the example below).



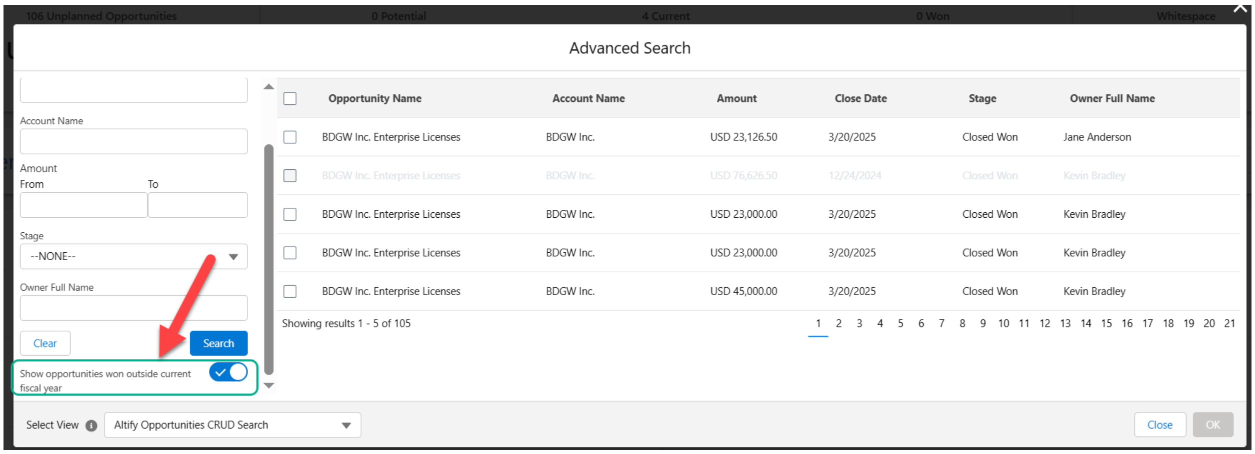
Access can be configured to assign read-only or read/write permission per partner user.

For more information see the following:

- Create a Partner Portal, Enable Partner Account and Users, and Add Members [Salesforce Trailhead]
- Create and Manage Partner Portals [Salesforce publication]
- Account Plan Access for Partner Users [Altify online help]

Toggle for importing won opportunities (9.14.5)

In v9.13, the date range for the importing of won opportunities into an account plan was updated from 'current and previous quarter' to 'current financial year'. In support of this a toggle is now displayed (*Show opportunities won outside current fiscal year*) when performing an advanced search of won opportunities to import.



Opportunities won outside the current fiscal year are displayed for information purposes only and cannot be selected for import.