



# Altify MCP v0.1.5 Release Notes

June 2026



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# Release Overview

This release marks a significant expansion of Altify's MCP (Model Context Protocol) capabilities, delivering new AI agent tools across three areas: **Account Planning**, **Methodology**, and **Sales Process Manager**. Together, these enhancements give sellers, sales managers, and AI agents a deeper, more consistent, and more actionable understanding of the accounts and opportunities they work with.

In **Account Planning**, a suite of new MCP tools enables AI agents to assess, analyze, and interrogate account plans across multiple dimensions. Agents can now evaluate account health across a portfolio of accounts, identify risks and gaps within individual account plans, surface solution recommendations mapped to Insight Map pressures and initiatives, prepare for Test & Improve sessions, and retrieve structured account plan data including objectives, actions, relationships, and pipeline. Sellers have full read/write access to their account relationship maps and can easily generate a concise AI-generated briefing on the key players and stakeholders for an account.

The **Sales Process Manager** module gains its first MCP read tools, giving AI agents full visibility into the sales process data associated with an opportunity. Agents can now read the assigned sales process and current stage, retrieve qualifiers and verifiable outcomes with their importance weightings and current states, and access closure probability scores for forecasting context. These capabilities make agent-generated opportunity guidance far more precise, grounding recommendations in the actual structured process data that sellers work with every day.

An updated list describing the [five Altify MCP Servers and their tools](#) is available in the Altify online help.

The new **Methodology** capability ensures that all Altify MCP tools now honor an organization's preferred sales methodology. Administrators can configure custom terminology, preferred frameworks (such as Altify methodology, MEDDIC, or homegrown variants), and behavioral guidance, and the agent will adapt its outputs accordingly. Every existing MCP tool — spanning analysis, assessment, call plans, vulnerability analysis, recommendations, next best actions, questions, action commentary, and account plan tools — has been migrated onto this customization framework, ensuring consistent, methodology-aligned responses across the board.

# Account Planning

## New user functionality

### Account Health

Sellers can now ask the AI agent to evaluate the health of their account portfolio in a single request. The agent assesses each account against a set of health signals — including data completeness, engagement consistency, objective linkage, and relationship coverage — and returns a clear summary that indicates which accounts require attention and which are in good shape.

Because account plans are only as valuable as the quality of the data behind them, this feature helps sellers and sales managers quickly spot where plans need strengthening and focus their efforts accordingly. Rather than manually reviewing each account, a seller can prompt the agent and immediately understand where to prioritize their time.

The following are examples of prompts that can be used with this feature:

- *Which of my accounts need the most attention right now?*
- *Give me a health summary of all my accounts.*
- *Which accounts have incomplete relationship maps?*
- *Where should I focus my account planning effort this week?* [pictured below in Claude]

The screenshot shows a chat interface with a prompt: "Where should I focus my account planning effort this week?". The AI response includes a summary of account health metrics: 2 accounts to act on this week, 3 in the plan & build stage, 2 in early stage, and a total pipeline closing of \$1.14M within 30 days. A red alert indicates "ACT THIS WEEK — REVENUE AT RISK NOW". A detailed view for Citicorp shows a \$920K open pipeline, close dates of Jun 25-26, and no account plan. Below, an "OPEN OPPORTUNITIES" section lists "Service Cloud Pilot" with requirements of 45% and a value of \$800K by Jun 26, with an "Analyse" button.

## **Account Assessment**

The Account Assessment tools give the AI agent the ability to perform two complementary analyses of a single account plan. The first is a deep assessment of the account plan itself — examining the relationship map, insight map, account details, and objectives and actions in depth to identify specific gaps, risks, and areas for improvement. The second is a wider analysis across all opportunities linked to the account, drawing on existing opportunity tooling to identify deal-level risks and surface prioritization recommendations across the full pipeline.

Together, these two lenses give sellers and sales managers a comprehensive view of an account's strategic position — both at the plan level and across the associated opportunity pipeline. Rather than reviewing each opportunity or plan section individually, a seller can ask the agent and receive a structured, prioritized assessment in a single response.

The following are examples of prompts that can be used with this feature:

- *Assess my account plan for Acme Corp — where are the risks and gaps?*
- *What does my relationship map tell you about our coverage on this account? [pictured below in Claude]*
- *Analyze all the opportunities linked to this account and tell me where I should focus.*
- *What should I do to bring this account plan up to a green score?*

Re Ancaster Engineering account, what does my relationship map tell you about our coverage on this account?

Used Altify Retrieve MCP (Dev) integration, loaded tools >



INNER CIRCLE — 5 CONTACTS

CU	Charles Underwood	President & CEO	Inner Circle	Neutral	Brief contact	
CW	Clara Wilson	EVP Global Sales	Inner Circle	Neutral	Brief contact	LOR: Vendor / Credible Source
PM	Patti Miller	SVP Operations	Inner Circle	Supporter	In-depth	
AR	Ahmad Rishad	SVP Product Dev	Inner Circle	Supporter	Multiple contacts	
	Mitch Brown	Dir.	Inner Circle	Multiple contacts	LOR: Trusted Advisor	

COVERAGE ASSESSMENT

- Critical gap — CEO & Decision Maker only briefly engaged.** Charles Underwood (CEO, Approver) and Clara Wilson (EVP Sales, your key Decision Maker) are both Inner Circle, both Neutral, and both at Brief contact only. These are your two most important contacts at the account level and your coverage is the shallowest it can be without being zero.
- Enemy with no contact.** Mark Garcia (SVP Marketing) is an Enemy in the Political Structure with zero contact — and he influences Charles Underwood directly. You have no foothold with him at all.
- Only 2 mentors across 23 contacts.** Mitch Brown and Lisa Leung are your mentors. Mitch is Inner Circle — strong. But Lisa Leung is in the Political Structure and her influence is primarily in the Broadcast/Dev area. You are thin on coaching access at the executive level.
- Supporter-heavy at the bottom, weak at the top.** Your supporters (Tim Naans, Beth Angel, Robert Glenn, Roberta Winters, Jean Winston, Duncan Dredge) are concentrated outside or low in the political structure. Strong breadth, but it doesn't reach power.
- Patti Miller and Ahmad Rishad are real assets.** Both are Inner Circle Supporters with decent coverage (In-depth and Multiple contacts respectively). Use them as a bridge to Charles Underwood and Clara Wilson.
- LOR with Mitch Brown is strong.** Brian Rice is at Trusted Advisor with Mitch — the highest level. Tiffany Chang is at Problem Solver, targeting Trusted Advisor. This is your best team relationship on the account.

Here's the honest read on your Ancaster Engineering coverage:

**The headline problem is an inverted pyramid.** You have strong, in-depth relationships at the bottom of the political structure — multiple supporters outside the inner circle — but your coverage thins out dramatically as you go up. The two people who matter most at the account level, Charles Underwood (CEO) and Clara Wilson (EVP Sales, Decision Maker), are both only at Brief contact and both Neutral. That is a fragile position with \$1.81M in open pipeline.

## Account Insights

The AI agent can surface solution recommendations that are directly mapped to the pressures, initiatives, and opportunities captured in an account's Insight Map. This

means that instead of generating generic suggestions, the agent anchors its recommendations in the specific customer context that has been recorded in the plan — making its outputs immediately relevant and actionable.

The following are examples of prompts that can be used with this feature:

- *What solution recommendations do you have based on this account's insight map?* [pictured below in Claude]
- *Map your recommendations to the pressures and initiatives we've captured for this customer.*
- *Which of our solutions best address this account's stated goals and pressures?*

## Account Review

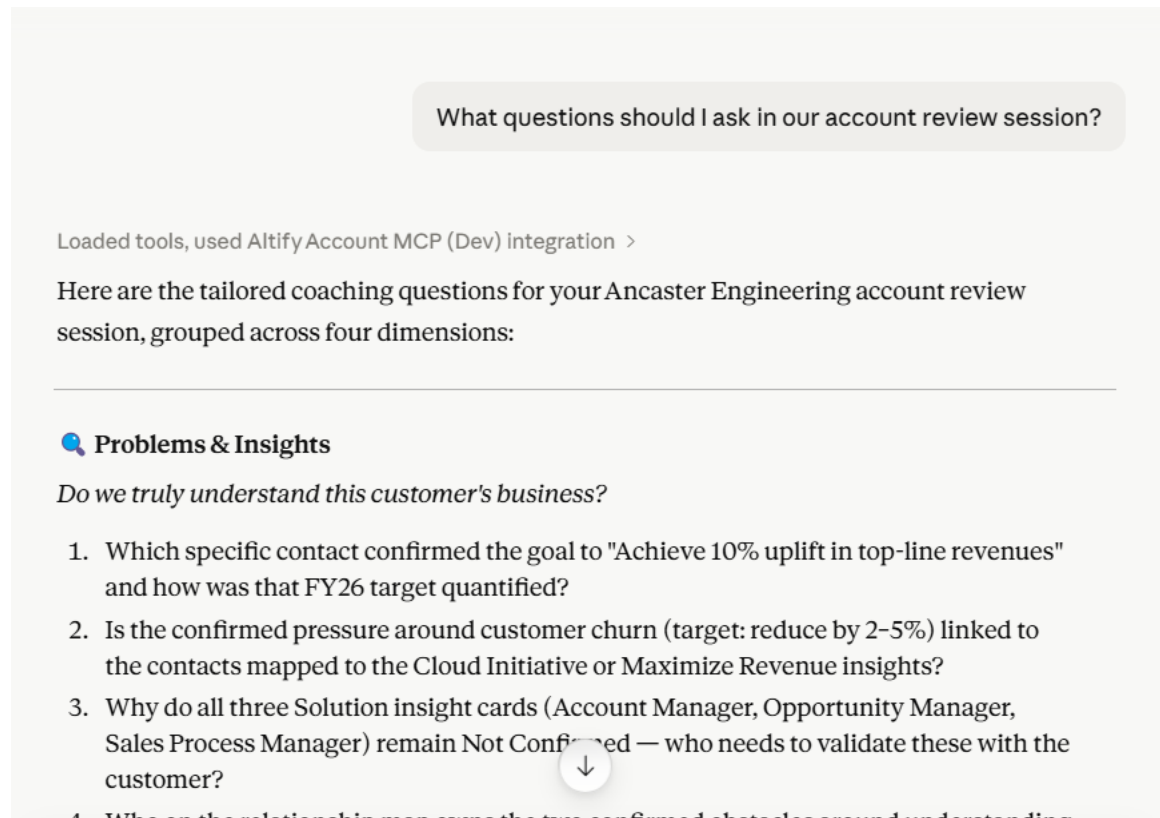
A set of account review tools provides sellers and sales managers with AI-assisted support for the key activities involved in reviewing an account plan. The agent can identify gaps and vulnerabilities in a single account plan, analyze account-level actions to highlight what is at risk or overdue, and prepare coaching material for an upcoming Test & Improve session — drawing on the full context of the account plan to generate targeted questions and recommendations for the review.

Sales managers in particular will find the Test & Improve preparation capability valuable, as it helps structure the review conversation around the most critical areas

of the plan rather than relying on the presenter to surface them. A usability improvement also addresses an edge case where a user filter was not being applied on the initial prompt when listing accounts — this has now been resolved.

The following are examples of prompts that can be used with this feature:

- *Where are the gaps and vulnerabilities in this account plan?*
- *Help me prepare for the Test & Improve for Acme Corp next week.*
- *What questions should I ask in our account review session?* [pictured below in Claude]
- *Review the actions for this account and tell me what's at risk.*



## Account Contact Intelligence

Sellers preparing for a customer meeting often need to quickly understand who the key contacts are, where influence sits, and what actions to prioritise — without having to review the full account plan in detail. The Account Contact Intelligence tools address this directly by giving the AI agent two complementary capabilities.



The first is a **contact intelligence briefing**: the agent can generate a concise, pre-meeting summary of the contacts on an account, drawing on the relationship map to surface who matters most, how influence flows between stakeholders, and what next actions are most relevant given the current state of the account. This briefing is designed to be consumed quickly, giving sellers the context they need in the minutes before a meeting rather than requiring a full review of the account.

The second capability covers **relationship map read and write tools** at the account level, mirroring the tools that already exist for opportunity relationship maps. The agent can now read the full account relationship network — including contacts, their attributes and relationships — and write back to it, updating contact map details and creating contact influence relationships. This means that information surfaced during an agent conversation can be captured directly into the relationship map without the seller needing to navigate away.

The following are examples of prompts that can be used with this feature:

- *Brief me on the key contacts for Acme Corp before my meeting this afternoon.*
- *Who are the most influential stakeholders on this account, and what's our current relationship with them?*
- *Show me the relationship map for this account.*
- *Add Harry White as a contact on the Ancaster Engineering account relationship map and mark him as a member of the Political Structure. [pictured below in Claude – note how Claude confirms the action before proceeding with the update]*
- *Update the influence relationship between James and the Procurement team.*

Add Harry White as a contact on the Ancaster Engineering account relationship map and mark him as a member of the Political Structure.

Searched available tools >

I'll look up both the Ancaster Engineering account and Harry White's contact record at the same time.

Searched available tools >

Now let me look up both the account and contact simultaneously.

Used Altify Salesforce MCP (Dev) integration, loaded tools >

I found both records. Harry White is a Sales Manager - Automotive (currently associated with King Group in Salesforce, but you'd like him on the Ancaster Engineering account relationship map). Here's a preview of what will be added before I make any changes:

**Preview — Add to Account Relationship Map**

- **Contact:** Harry White (Sales Manager - Automotive)
- **Account:** Ancaster Engineering
- **Political Status:** Political Structure



Shall I go ahead and make this update?

# Sales Process Manager

## New user functionality

### Sales Process Read Tools

The AI agent can now read structured Sales Process Manager data for any opportunity that has a sales process assigned. In a single operation, the agent retrieves the assigned sales process and current stage, the full list of qualifiers and verifiable outcomes across all stages — including each qualifier’s importance weighting (Nice to Have, Important, Very Important, or Essential) and current state (No, In Progress, or Yes) — and the opportunity’s closure probability score.

The closure probability is calculated using the same formula as the Altify Sales Process Manager page, so the value the agent surfaces will always match what a seller sees when they look at the opportunity directly. The agent can also list all active sales processes configured in the organization, which is useful for helping sellers or agents identify which process is most appropriate for a given opportunity.

Together, these read tools give the AI agent the full context of where an opportunity stands within its sales process — something that was previously invisible to the agent, and which caused recommendations to be disconnected from the actual structured process the seller was following.

The following are examples of prompts that can be used with this feature:

- *What sales process is assigned to this opportunity, and what stage are we at?* [pictured below in Claude]
- *Show me the qualifiers for this opportunity and tell me which ones are incomplete.*
- *What is the closure probability for this opportunity?*
- *Which qualifiers are marked as Essential and not yet answered?*
- *What sales processes are available in our org?*

What sales process is assigned to this opportunity, and what stage are we at?

Loaded tools, used Altify Retrieve MCP (Dev) integration >

Here's what I found for the **100 Enterprise Licenses** opportunity:

**Sales Process:** Large Enterprise (Final Stage Probability: 95%)

**Current Stage:** The opportunity is at the **Acquisition** CRM stage, and all qualifiers across all four sales process stages are currently unanswered, giving a closure probability of **25%** (0% on a live recompute).

The four stages in the Large Enterprise process are:

1. **Verbal Order** — 3 Essential qualifiers (all unanswered), covering signed MSA, signed contract, and signed PO
2. **Differentiate Value - Evaluate Options** — 6 qualifiers (all unanswered), covering solution fit, competitive strategy, political mapping, decision criteria, success metrics, and insight map validation

# Sales Methodology

## New user functionality

### Methodology-Aware Agent Behavior

All Altify MCP tools now adapt their outputs to reflect the sales methodology configured for the organization. Previously, the AI agent produced responses using Altify's default terminology and frameworks regardless of how an individual organization had configured their sales approach. With this release, every tool — spanning analysis, assessment, call plans, vulnerability analysis, recommendations, next best actions, questions, action commentary, and account plan tools — draws on the organization's configured customization settings when generating its output.

This means that if an organization uses MEDDIC, their own modified version of Altify, or an entirely homegrown framework with custom terminology, the agent will reflect that in its responses. Stage names, qualifier labels, and other methodology-specific terms will appear as the seller knows them, rather than as Altify defaults. The agent also maps natural-language synonyms to the correct system concepts — so if a seller asks about their 'org chart' instead of their 'relationship map', or refers to 'next steps' instead of 'actions', the agent understands the intent and responds correctly.

The full list of MCP tools covered by this framework is as follows: analysis, assessment, call plan, vulnerability, recommendations, next best actions, questions, action commentary, account plan gaps, account plan analysis, account plan recommendations, account plan improvement questions, account T&I coaching prep, account contact intelligence briefing, and questions analysis. No code changes are required — the methodology customization is configured entirely through Altify's customization settings.

In the following example, Claude has been asked to generate a call plan for an opportunity. A customization is in effect in the Salesforce org so the call plan, including the call objectives shown below, are informed by the core pillars of the Meddic sales framework:

#### SMART Objectives for This Call

1. **Priority & Timing** — Obtain customer confirmation of initiative priority level (High/Medium/Low) and any compelling event or deadline driving urgency.
2. **Metrics & Baseline** — Confirm current sales productivity metrics (quota attainment, win rate, avg deal size) and the 15% improvement target with a defined time horizon.
3. **Budget & Economic Buyer** — Identify the budget owner, confirm funding status (allocated vs. requires approval), and secure a path to an executive introduction within 10 business days.
4. **Decision Criteria & Process** — Document at least 5 formal decision criteria, their relative weighting, and the full approval process and timeline.
5. **Stakeholders & Champion** — Map at least 6 stakeholders by role and influence, and identify one internal champion willing to actively advocate for the solution.

## New functionality to be administered

### Configuring Methodology Customization

The methodology customization framework is configured through **ALTF\_\_Customization\_\_c** records in Salesforce. Administrators can define custom terminology, preferred frameworks, and behavioral guidance that will be applied consistently across all supported MCP tools. No code changes or redeployment are required — changes to customization records take effect immediately for subsequent agent interactions.

For more information, see [Methodology Customization for Altify MCP](#) in the Altify online help.