Altify MaxAI 2.4.0 Release Notes

August 2026

ALTIFY

Table of Contents

ALTIFY

Release Overview

This release of **Altify MaxAI 2.4.0**, made available in **August 2026**, brings the **MaxAI Revenue Execution agent** (built on Salesforce Agentforce) to full methodology-customization parity across both Opportunity and Account Plan tools, adds a new **Account Plan improvement toolset**, and improves how the agent respects your organization's configuration when reading pipeline and insight data.

Administrators can now override the **methodology language** used across every major Agentforce tool — both Opportunity tools, such as Call Plan, Assessment, and Recommendations, and Account Plan tools, such as Contact Briefing, Strategy, and Deep Assessment — so AI-generated output can reflect your organization's own sales methodology (for example MEDDICC, Challenger, or a homegrown framework) instead of Altify's default framing, without any code change or release.

Sellers can now ask the agent to **identify gaps** in an account plan, **get prioritized recommendations** for improving it, or **generate coaching questions** to challenge the plan — the same trio of diagnostic tools already available for opportunities. Sellers can also retrieve full **Test & Improve session detail** — questions, vulnerabilities, recommendations, and actions — for any Account, Opportunity, or Account Manager plan session, not just a list of sessions.

Account smart tools also now respect the **Account Plan Type's configured tabs**, so disabled sections are never reported as gaps. Pipeline and financial tools respect a **custom opportunity amount field** where one is configured, and insight completion status now reflects your organization's **enhanced Insight Map validation** where enabled.

Note: Altify v9.18 is the minimum supported version for Altify MaxAI v2.4.0

ALTIFY

Customizing Altify Methodology for AI

New user functionality

Methodology Customization for Agentforce

Out of the box, the MaxAI Revenue Execution agent generates coaching, call plans, assessments, and recommendations using Altify's own sales methodology. Administrators can now override this methodology language across the agent without any code change or release, so AI-generated output can reflect your organization's own framework — for example MEDDICC, Challenger, or a homegrown methodology — instead of Altify's default framing.

This release brings every major Agentforce tool onto the same customization framework, across both Opportunity and Account Plan data:

- **Opportunity tools:** Call Plan, Opportunity Assessment, Vulnerability Analysis, Next Best Actions, Strategic Recommendations, Action Commentary, and Improvement Questions.
- **Account Plan tools:** Contact Intelligence Briefing, Account Details Suggestions, Solution Recommendations, Suggest Insights, Generate Objectives & Actions, Generate Account Plan Strategy, Account Plan Overview, and Account Plan Deep Assessment.

Two kinds of override are available: a **chokepoint** override changes the shared methodology framing across every opportunity or every account-plan tool at once, while a **per-tool** override is scoped to a single action for finer control. Overrides take effect on the agent's very next request — there is no restart or warm-up period — and clearing an override reverts to Altify's default output immediately.

New functionality to be administered

Configuring a Methodology Override

Administrators can override Altify's default methodology framing to match their organization's own sales methodology (e.g. MEDDICC, Challenger, or a homegrown playbook). An override can be applied broadly — to every opportunity tool or every account-plan tool at once, with a single record — or scoped to just one specific tool, by creating and activating a customization record for the relevant slot with the replacement methodology text as its content.

For full configuration details, see Methodology Customization for Altify MaxAI in the Altify online help.

ALTIFY

Account Planning

New user functionality

Account Plan Gaps Analysis

Sellers can now ask the agent to identify weaknesses and gaps in an account plan across the four Account Manager dimensions: Problems & Insights, People & Relationships, Positioning & Value, and Plans & Execution. The agent reviews the Insight Map, Relationship Map, pipeline and whitespace, objectives and actions, and Test & Improve history for the plan, then returns a gap matrix showing the health and severity of each dimension, how the plan measures up against the hallmarks of a strong plan, the most critical weaknesses with supporting evidence and corrective actions, and any compound risk flags. This tool diagnoses what's wrong or missing — it's the account-level counterpart to the existing opportunity vulnerability analysis, and pairs with the new Account Plan Recommendations tool below, which prescribes the fix.

If more than one account plan type is active for the account, the agent will ask which one to use before proceeding.

Example prompts:

- *What are the gaps in the Acme account plan?*
- *Where is the Acme account plan weak?*
- *Identify vulnerabilities in the Acme account plan*
- *What's wrong with the Acme account plan and what's missing?*

Account Plan Recommendations

Sellers can now ask the agent for prioritized next steps to improve an account plan. The agent returns an executive summary, priority actions grouped into immediate (1–2 weeks), short-term (about a month), and strategic (quarterly) horizons, dimension-specific recommendations, suggested improvements to existing objectives, and owner assignments for each recommended action. This is the prescriptive counterpart to Account Plan Gaps Analysis above — gaps identify what's wrong, recommendations set out what to do about it.

Example prompts:

- *Recommend actions to improve the Acme account plan*
- *What should I do next on the Acme account plan?*
- *How do I improve the Acme account plan?*
- *Give me recommendations for the Acme account plan*

Account Plan Improvement Questions

Sellers can now ask the agent for coaching questions to challenge and strengthen an account plan, completing the account plan improvement trio alongside Gaps Analysis and Recommendations above. The agent returns 12–16 questions grouped under the four Account Manager dimensions (e.g. relationship map, objectives & actions), each framed as a prompt to probe, challenge, or investigate — for example, Consider asking…, Probe whether…, or Challenge the assumption that… — and grounded in the account's actual data (real contacts, insights, and opportunities) rather than generic prompts.

Example prompts:

- *What questions should I ask about the Acme account plan?*
- *Give me coaching questions to improve the Acme account plan*
- *What should I probe on Acme to strengthen the plan?*
- *Help me challenge the Acme account plan with some questions*

Account Tools Respect Plan Type Configuration

Account smart tools now check which tabs are enabled for the account's Plan Type before generating output, so a disabled section — for example, Test & Improve on a plan type that doesn't include it — is never reported as a gap or vulnerability. Responses also state which plan type was used to generate the output, including when a default was applied because only one plan type is active.

Unified Test & Improve Session Detail

Sellers can now ask the agent for the full detail of a Test & Improve session — not just a list of sessions, but the questions, vulnerabilities, recommendations, and actions captured during it. The agent automatically recognizes whether the session belongs to an Account, an Opportunity, or an Account Manager plan, so the same request works across all three. Sellers can also ask for all open sessions for a given account, opportunity, or Account Manager plan.

Example prompts:

- *What came out of the last Test & Improve session for Acme?*
- *Give me all the info for the latest Test & Improve session for Acme*
- *What actions were created for this Test & Improve session?*
- *What recommendations were created for the Acme account manager plan Test & Improve session?*
- *List the Test & Improve sessions for Acme*

Custom Opportunity Amount Field Respected

Pipeline and financial tools — including account plan assessments and recommendations that reference opportunity value — now read a custom opportunity amount field where one has been configured, instead of always defaulting to the standard Salesforce Amount field. Where a custom field is configured, the agent labels the figure using that field's own name (for example, “Contract Value (Local)”) rather than a generic label, so figures read naturally alongside how your organization already tracks deal value elsewhere in Altify. Behavior is unchanged for organizations that have not configured this setting.

ALTIFY

Insight Maps

New user functionality

Insight Completion Status Reflects Enhanced Validation

Where an organization has turned on **Enable Enhanced Validation** for insights, a completed insight card carries a distinct, further-validated meaning — for example, an obstacle marked Overcome or a solution marked Implemented — rather than simply being marked Confirmed. The agent now reads this configuration and interprets insight completion status accordingly, so its commentary on insight completeness accurately reflects your organization's enhanced Insight Map validation where enabled.