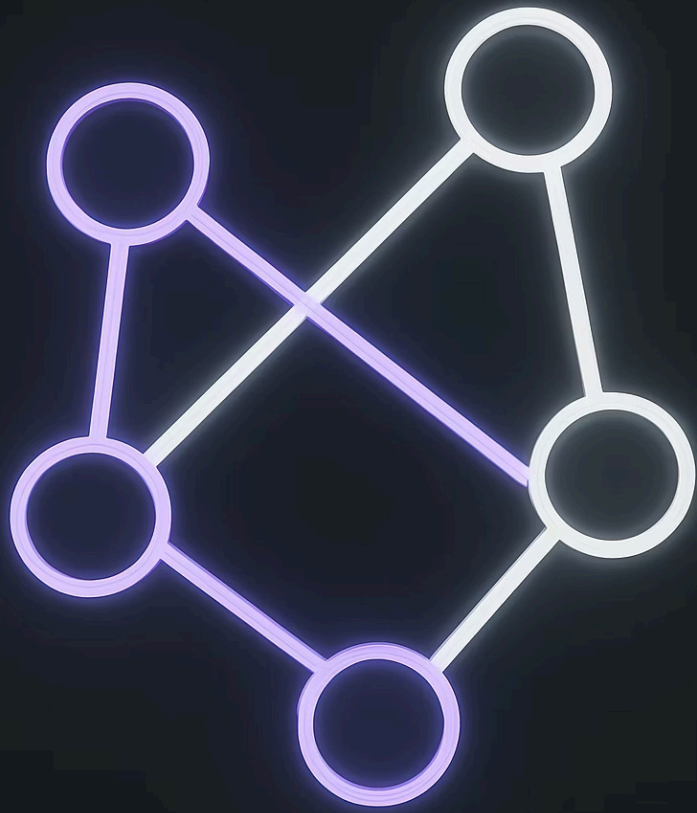




Vantara

AI execution for revenue, outreach, and operations.
From lead to booked meeting — with every action tracked.

Shane Schwulst · Founder | AI Architect · ai-vantara.com



THE PROBLEM

Growth teams are not short on tools. They are short on execution.

❏ **The bottleneck is not information. The bottleneck is action.**

The Reality

- Leads sit untouched for hours — or days
- Follow-up happens too late to matter
- Reps burn hours researching, dialing, logging, chasing, and rescheduling
- CRMs store data but do not drive action

The Result

- Outreach tools create tasks — humans still have to execute them
- Meetings fall through because booking and follow-up are fragmented
- Managers cannot see what actually happened across calls, messages, and meetings
- Valuable conversations disappear into scattered notes, recordings, and inboxes

AI is moving from assistance to execution.

Three generations of software. One direction: toward action.

Old Software

- Stores data
- Shows dashboards
- Creates tasks
- Waits for humans

AI Copilots

- Draft content
- Suggest next steps
- Summarize outputs
- Assist the human

Vantara

- Sources · Enriches · Calls
- Messages · Qualifies · Books
- Records · Updates · Tracks
- **Executes**

The next generation of software will not just tell teams what to do. **It will complete the work.**

PLATFORM

Vantara is the AI execution layer for business workflows.

Vantara connects outbound AI voice, lead generation, enrichment, LinkedIn outreach, scheduling, Google Meet booking, CRM sync, meeting recording, healthcare operations, workflow logic, analytics, and guardrails into one connected execution system.

One platform

From lead to outcome

One workflow

Voice, LinkedIn, CRM,
calendar, analytics

One operating layer

Automated outreach
execution

One source of truth

Activity, results, and
outcomes

One system

Manual follow-through →
measurable action

From lead to outcome, Vantara executes the loop.

Most tools handle one step. Vantara connects the entire motion — from first source to final outcome, without waiting for a human to bridge the gaps.



☐ **Revenue workflows that do not wait for human follow-through.** Every call, message, meeting, and outcome becomes trackable inside one system.

DIFFERENTIATION

The advantage is the depth of execution.

Vantara is not a feature. It is a connected execution stack — twenty capability layers working as a single operating system for revenue and operations.

Outbound AI Voice

Lead Generation

Verified Contact
Enrichment

Pre-Call Intelligence

Campaign
Orchestration

Booking Workflow

Google Meet
Scheduling

LinkedIn Outreach
Automation

CRM Sync

Official Salesloft
Partnership

Meeting Recording

Healthcare Operations

Workflow Builder

Human Takeover

Policy Guardrails

Analytics and
Outcome Tracking

AI that holds real outbound phone conversations.

Live Call Capabilities

- Real-time outbound AI voice conversation
- Natural turn-taking and barge-in support
- User-first interruption handling — no talking over prospects
- Silence discipline — no awkward filler
- Structured qualification logic built into call flow
- Booking-focused conversation design

Call Operations

- Call outcome classification
- Graceful call exits
- Call attempt tracking and history
- Post-call finalization and status update
- Focused outbound caller behavior — designed for sales, not inbound support

This is not a voice demo. It is an operational outbound calling system.



Every eligible call starts with better context.

Vantara's native pre-call intelligence is built directly into the execution layer — not bolted on as an afterthought. Before the AI places a single call, it already knows the lead, the company, and the campaign objective.

Richer Context

Lead, company, and campaign-specific context loaded before the conversation begins — enabling more credible, more relevant call openings.

Smarter Qualification

Fresher context drives better qualification framing. The AI asks the right questions because it already understands the prospect's landscape.

Guarded Intelligence

Context is guarded so the AI stays grounded. It will not fabricate claims or go off-brief. Execution stays controlled and commercially safe.

Vantara helps the AI sound prepared — without asking reps to manually research every prospect before every call.

The call does not end at interest. It converts into a booked meeting.

Qualification is the beginning. The goal is a completed business outcome — a confirmed Google Meet demo on the calendar before the conversation ends.

Detect Intent

Capture buying signals early so the conversation moves from curiosity to a real scheduling opportunity.

Verify Prospect

Confirm the name and spelling, then verify the email so the booking is tied to the right contact.

Check Availability

Check the live calendar, present real slots, and keep the flow moving toward a concrete next step.

Book Demo

Confirm the Google Meet booking in real time and update the lead status as the outcome is completed.

Conversation Layer

- Captures prospect name and confirms spelling
- Captures and spells back email for verification
- Captures timezone where needed

Booking Layer

- Checks live calendar availability and presents real slots
- Books the Google Meet demo and confirms in real time
- Records booking result and updates lead status in dashboard

Outbound campaigns with execution discipline.




Campaign Setup and Control

- Campaign creation with lead import and selection logic
- Configurable dialing windows and retry scheduling
- Concurrency control and dialer rate limiting
- Lead status transitions tracked through the lifecycle

Operational Visibility

- Campaign dashboard metrics and call result tables
- Call attempt history and outcome tracking
- Best-call-time analytics by day and window
- Real-time and post-call UI updates with persistent post-call state

 **Vantara does not just call a list.** It manages the full operational lifecycle of outbound execution — from first attempt to final outcome classification.

Better outreach starts before the first touch.

Reaching the right person with the right context is a prerequisite for conversion. Vantara improves both reachability and relevance before a single message is sent or call is placed.

Lead Generation

Structured lead generation workflows feed directly into campaigns — no manual CSV gymnastics required.

Contact Enrichment

Verified mobile and direct dial enrichment improves reachability at the number level — not just the company level.

Pre-Call Context

Lead, company, and campaign context loaded per conversation for context-aware call openings and more relevant qualification.

Campaign Feed

Enriched leads flow directly into voice and LinkedIn campaigns — one continuous motion from source to outreach.

Vantara extends execution beyond the phone.

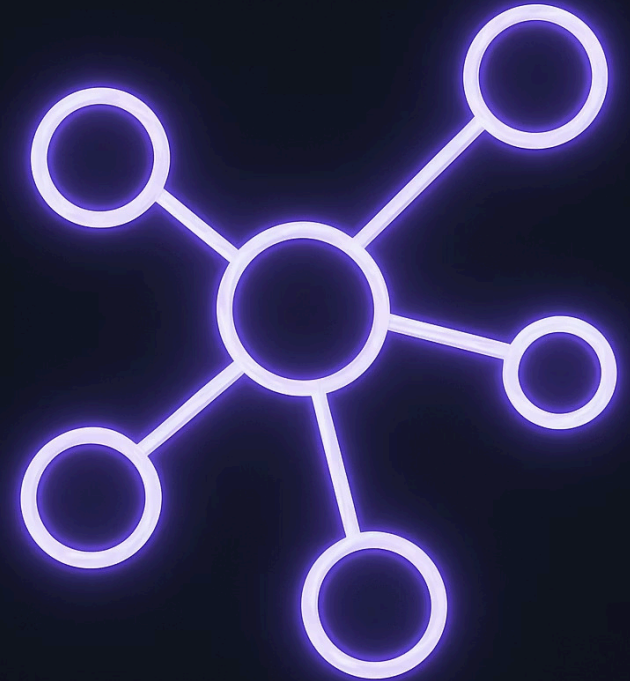
LinkedIn is not a disconnected side tool. Vantara brings LinkedIn outreach into the same execution system — same campaign logic, same outcome tracking, same operator visibility.

Sequence and Account Control

- Customer-owned LinkedIn account connection
- Sequence builder with schedule controls and ICP score check
- Send connection requests and manage withdrawals
- Send messages and voice notes
- Seat and account controls with pause, resume, and stop states

Engagement Actions

- View profile, like posts, and AI-generated tailored comments
- Lead import from lead generation into LinkedIn campaigns
- Inbox and thread visibility for connected accounts
- Campaign event tracking across all sequence actions
- Native execution foundation — not a patched third-party integration



Vantara makes the revenue stack execute.

Vantara does not replace the revenue stack. It connects to it — and makes it execute outcomes instead of waiting for manual updates.



Google Calendar + Google Meet

Power the end-to-end booking workflow — from availability check to confirmed demo link — without leaving the Vantara execution layer.



Salesforce + HubSpot

CRM-connected execution with field mapping, sync jobs, retry and recovery logic, event logging, and durable outcome state written back to the record.



Official Salesloft Integration

A highlighted official partnership and integration pathway — purpose-built to connect Vantara execution into the sales engagement stack where Salesloft already lives.

📄 **A system of action connected to the system of record.** Every sync is logged, validated, retried on failure, and surfaced in the operator dashboard.

Every workflow needs the right voice and the right number.

Voice identity and number infrastructure are not configuration details. They are part of the conversion strategy — and Vantara treats them that way.

Channel and Number Management

- Shared Channels inventory with local and toll-free number support
- Module-specific number assignment — outreach callers and healthcare intake numbers configured separately
- Automatic assignment of numbers to open caller slots
- Outreach caller number configuration per campaign

Voice Identity

- Caller profile setup with premium voice catalog
- Instant voice clone capability for brand-consistent caller identity
- Voice clone recovery flow where applicable
- Voice identity configured as part of execution strategy — not an afterthought

The number, voice, and caller profile are part of the execution layer. They define how the platform presents itself — and how prospects receive it.

Every meeting and call becomes usable intelligence.

Vantara captures what happened — not just that something happened. Every recorded conversation becomes a durable, reviewable, analyzable asset for the operator.

Recording and Playback

- Meeting recorder and call recording support
- Playback links and download controls where available
- Recording availability handling

Session Intelligence

- Meeting session details and call history
- Notes and post-call summaries
- Outcome visibility tied to each session

Operator Review

- Manager review workflows built in
- Post-call analytics and outcome classification
- Durable call and meeting records across the dashboard

The same execution engine extends into healthcare operations.

Vantara is not limited to sales workflows. The Healthcare Operations module brings the same execution discipline to intake, coordination, scheduling, and follow-up in complex operational environments.

Healthcare Module Capabilities

- Dedicated healthcare voice setup and intake number assignment
- Healthcare request handling and fulfillment setup
- Operational workflows for intake, coordination, scheduling, and follow-up
- Healthcare-specific context and workflow logic
- Shared number and channel infrastructure with the core platform
- Healthcare analytics and outcome tracking

Strategic Significance

Healthcare is the first proof point that the Vantara execution engine can operate beyond revenue teams — in regulated, structured, operationally complex environments.

The same platform. A new vertical. The same execution discipline.

Vantara can execute structured phone-based operations wherever a human workflow currently creates the bottleneck.



Built for controlled execution, not reckless automation.

Autonomous execution demands accountability. Vantara is architected around guardrails, operator oversight, and measurable outcomes — not unchecked AI autonomy.

Control Infrastructure

- Workflow and action builder with reusable templates
- Real-time policy and guardrails engine — AI responds only within authorized boundaries
- Deterministic booking workflow — no improvisation at the point of conversion
- Human takeover and warm transfer capability where available
- User speech priority — no uncontrolled autonomous speaking
- Graceful termination and structured failure handling

Operator Visibility

- Post-call evaluations and regression tracking
- Version testing for AI behavior quality assurance
- Campaign metrics, call results, and booking outcomes in one dashboard
- Best call times by day, call attempt history, lead status movement
- Audio quality and latency monitoring
- Dashboard truthfulness — real-time and post-call UI updates reflect actual state

The power is in the connected details.

Vantara's moat is not one flashy demo. It is the number of real-world workflow details already connected into one coherent system of execution.

Voice

- Outbound AI calls · Real-time conversation
- Barge-in interruption · Silence discipline
- Premium voices · Instant voice clone
- Call outcome classification · Call recording

Campaigns

- Lead import · Campaign dashboard
- Dialing windows · Retry logic · Rate limiting
- Concurrency controls · Best-call-time analytics

Booking

- Intent detection · Name and email capture
- Email spelling verification · Timezone capture
- Google Meet demo booking · Confirmation flow

Lead Intelligence

- Lead generation · Contact enrichment
- Verified mobile/direct dials · Pre-call intelligence
- Context-aware openings · Safer personalization

LinkedIn

- Sequences · Connection requests · Messages
- Voice notes · Profile views · AI comments
- ICP scoring · Inbox visibility · Lead import

CRM / Sales Stack

- Salesforce · HubSpot · Google Calendar / Meet
- Official Salesloft partnership and integration pathway
- Field mapping · Sync jobs · Retry and recovery

Operations

- Policy guardrails · Regression tracking
- Human takeover · Workflow builder · Templates
- Analytics · Recording playback · Post-call summaries

Most platforms stop before the outcome. Vantara keeps expanding the execution layer.

Platform Type	What It Does	What It Can't Do
Generic AI Chatbot	Talks, answers questions	Needs a human to execute
Dialer	Places calls, requires reps	Limited intelligence or booking logic
CRM	Stores data	Does not execute — requires manual updates
Outreach Tool	Sends sequences, creates tasks	Fragmented from voice and booking
Meeting Tool	Records conversations	Does not drive pipeline execution
Vantara	Sources, enriches, calls, qualifies, books, records, updates, tracks	—

1

2

3

Now

- Outbound AI voice
- Lead gen + enrichment
- LinkedIn outreach
- Booking + CRM sync
- Meeting recording
- Healthcare Ops foundation
- Analytics + Guardrails

Next

- Unified communication timeline
- Deeper CRM and calendar write-back
- Expanded workflow builder
- Live operator console
- More service and support workflows
- Broader human takeover controls

Later

- White-label and partner distribution
- Broader vertical modules
- Full multi-channel execution layer
- Department-wide AI workflow execution
- Inbound, support, and scheduling modules

CLOSING VISION

Vantara turns business intent into completed action.

The future of business software is not another dashboard.

It is an execution layer that understands the goal, performs the work, records the outcome, and improves the next run.

"AI execution, not AI assistance."

One platform from prospecting to outcome. Where voice, outreach, scheduling, CRM, and analytics become one workflow.

Book a virtual demo.

Shane Schwulst

Founder | AI Architect

Email

support@ai-vantara.com

Website

ai-vantara.com