AI Variables

AI Variable Overview - How to Prompt

Learn how to use AI Variables to automatically research and qualify contacts and companies. Then reach out to engage — all on Genesy.

AI Variables let you add automated research columns to your lists so each contact or company row can be enriched with AI-generated insights (*Key pain points, Buyer persona, short summaries, Job title review, outreach hooks, etc.*). Use templates or build your own — then run them in bulk and store results as columns on your table.

What is an AI Variable

An **AI Variable** is a reusable prompt + settings bundle that tells Genesy how to research and return a specific piece of information for a Contact or Company. Think of it as a smart column: instead of manually researching, the AI reads the attributes you provide (name, domain, job title, LinkedIn, etc.), optionally searches external sources, and returns the answer in the format you want.

Use cases:

- Contact: "Best outreach icebreaker (1 sentence) for #{{first_name}} based on their recent activity."
- Company: "1-line summary of company growth signals (funding, hiring, product launch)."

How to run an AI Variable

- Import your contacts or companies into Genesy.
- Open the list where your rows live and Click **Enrichment > Enrich with AI** in the top-right of the list to open the AI enrichment modal.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1793139591/2f6fad62a1d8a3ee4100e6f98ecb/1111.png?expires=1770723900&signature=06dc7afd10a5d7835330aae37e7859549fb63a8f0b690691be5c37e0c0f683e3&req=dS

- Select one (or multiple) template(s) — either a Genesy ready-made template or one you've built — then click **RUN**.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1793140504/e3d18eaca94e0121112e3414ba6f/2222.png?expires=1770723900&signature=ad2f2a593bc20a4af3c019b403bb036edd181074e617b5d275a12f8389b24bf6&req=dS

- The result will appear as a new column in your table for each row processed.

Shortcuts:

Hover between two columns, click the **Add a column (+)** icon, and choose one of the AI Variables from the dropdown.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1793142898/10e049f625d940d458a05968673b/3333.png?expires=1770723900&signature=2d68fd945a42086dfb775ba84a08efffa91594eb912872e835159ce962cdf64a&req=dS

When the column is empty, hover the column header and click **RUN** to execute the variable for all rows in that view.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1793144528/11818f25a6c253e7ad95237585a8/4444.png?expires=1770723900&signature=4d39fbac4b4cb185c53ad3f4f2ae3e4f342912463c783a0fca8a046b084f1622&req=dS

Bulk runs: Click the column header → **Run column** → Visible rows / All rows.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1793145253/37f01980d7dee990ff8dad715896/5555.png?expires=1770723900&signature=d044808a3c320da8f03fd30ed7a109c0cb00dd17489072cca226a11b63842ce6&req=d

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Managing AI Variables

All AI Variables are managed from the **AI Playbook** page. From there you can:

- Create new variables
- Test a variable
- Edit prompts and settings
- Duplicate templates (fast reuse)
- Delete unused variables

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How to create a new AI Variable

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1793150929/57e55a62d6b5c17f764336a44e3f/7777.png?expires=1770723900&signature=e80fe1bf7900e5b619d983ed7d88575a1cbf7e3ce78a2c42a51d7b20a5ab9a4f&req=dSc

To create an AI Variable, you'll need to fill the form fields below:

- **Entity type** *(required)* — choose **Contact** or **Company**.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1793151914/36b89e506435038d4db041df0239/8888.png?expires=1770723900&signature=e2bbeea5fe2b19b54515142601e75ee413744304b2f95f1690a816372513de3e&req=dSc

- **Title** — a short name that describes the output (e.g., "Outreach Hook — LinkedIn", "Company Growth Signals").
- **Output (response type)** — select how you'd like the AI to return results. (tetx, number,etc).

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1793165417/d9968a1e50455a3b0ccc2e1d6f79/10.png?expires=1770723900&signature=7324740b6e1221f9e800a13848d411f6955daa8f9c0deeb0bf1eb99c23f79aa5&req=dSc
We currently support the following response types:

- **Text**: For open-ended answers, such as short descriptions, summaries, or hooks.
- **Number**: Returns a numeric value (no formatting). Ideal for scores, rankings, or counts.
- **Date**: Outputs a valid calendar date. Useful for events, deadlines, or timeline extraction.
- **One of**: Restricts results to a predefined set of options (e.g., *Yes/No, Hot/Warm/Cold*).

Keep in mind that the response type will affect the criteria you can set up.

You can also activate the **"Provide explanation"** option. When enabled, the AI will return both the selected result *and* a short reasoning behind it, giving your team more context.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1793169196/6f6f044617ab5eea392ec7e45fc9/11.png?expires=1770723900&signature=20432efdfe64d34035d08e09d7181995b8a37804dbd1b13a22e4eef8b9594972&req=d

- **Prompt** — the main instruction. This is where you tell the AI exactly what to return and the format. Use examples and explicit output rules. See templates below.
- **Add attributes** — select which row fields the variable can use as context. Common placeholders:
- `#{{firstname}}`, `#{{lastname}}`, `#{{job_title}}`, `#{{email}}`, `#{{phone}}`
- `#{{companyname}}`, `#{{domain}}`, `#{{website}}`, `#{{companysize}}`, `#{{industry}}`, `#{{hq_location}}`
- `#{{linkedinurl}}`, `#{{recentactivity}}`, `#{{lead_source}}`
- Use these inside prompts to make the AI answer relevant to each row.
- **Search & sources** — enable optional external research (Google Search, Google News, Website). If the modal's default sources don't find an answer, you can toggle additional sources
- **Select folder** (optional) — organize your variables into folders.
- **Select model** — pick a model (e.g., Grok-4, o3)
- **Save & Test** — before saving, click the **Test Prompt** button to run it on a sample contact or company record.

Qualification criteria and response types

Take the following example:

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1793160948/2c3a34af020c590cb6c3c7946f6b/9999.png?expires=1770723900&signature=d66997819e85d4930829d8a0f978a8db18f2414f32f288ac15e3c0551eee83c9&req=dS

The instruction is: **"Tell me if the company is either a B2B, B2C, or B2C with B2B products."**

Here, the **Output type** is set to **[One of]**, which restricts the AI's response to a predefined list of options. In this case, the AI will only return one of the following values:

- **B2B**
- **B2C**
- **B2C with B2B products**

This ensures consistency, makes results easier to filter and analyze, and prevents unexpected or vague answers.

👉 Use **[One of]** whenever you want the AI to choose from a closed set of answers (e.g., *Yes/No, High/Medium/Low, Hot/Warm/Cold*).

Examples of Effective Prompts

- ✅ "Classify #{{company_name}} into one of the following categories: Enterprise, Mid-market, or SMB. Return only one of these."
- ✅ "Based on #{{company_name}}'s website and #{{industry}}, summarize their core value proposition in one sentence."
- ✅ "From #{{domain}} and #{{industry}}, list up to 3 potential business challenges the company may face. Return as a bullet list."
- ✅ "Review #{{company_name}}'s website. Identify if they primarily sell products, services, or both. Return exactly one of these options."
- ❌ "Tell me everything about this company." *(too vague, no structure)*

Ready-to-Use Best Practices Template

Persona

(e.g. Who you need to be? an analyst, a writer, a prompt engineer...)

You are a market research analyst at a SaaS company called Genesy, which helps sales teams qualify leads and companies more effectively using AI Variables.

Task

(e.g. What you want to do?: Distinguish between b2b b2c/ get the language of a lead...)

Your task is to return a structured, insight-rich analysis about a given company using the provided data points. Always keep the result concise, actionable, and aligned with sales qualification needs.

Instructions

(e.g. How to do it. Step instructions)

- *Be precise — clearly describe the company's profile using the available attributes.*
- *Use placeholders — #{{company_name}}, #{{domain}}, #{{industry}}, #{{hq_location}}, #{{company_size}}.*
- *Add context — highlight details that matter for lead qualification (e.g., company size, funding stage, growth signals).*
- *Set constraints — limit the response to exactly 3 lines OR output as structured JSON (depending on use case).*
- *Return only the requested output. No extra commentary or formatting.*

Example

(If applicable. Show the AI how to answer and how not to answer)