

## How Unify Built AI Research Agents at Scale



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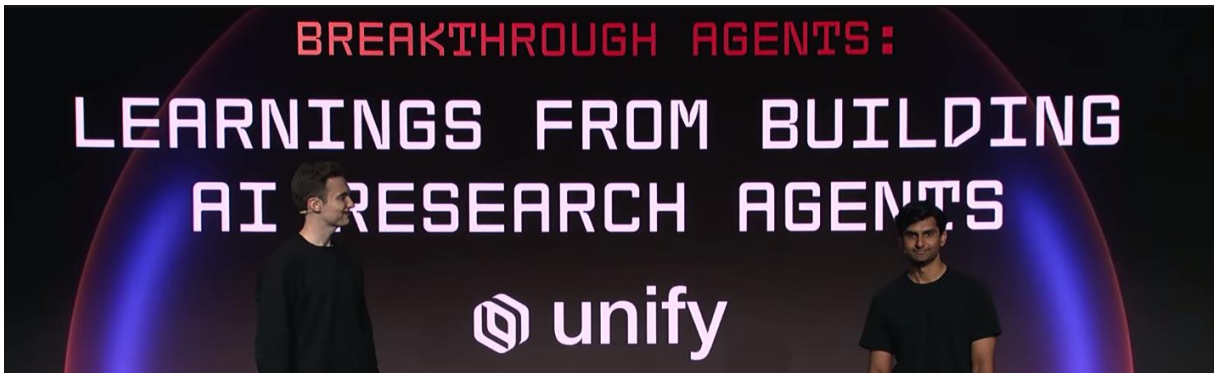


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Unify scaled their AI research agents to handle 36 billion tokens monthly - here's what Connor Heggie (CTO) and Kunal Rai (Engineer) learned along the way. From initial ReAct framework experiments to production deployment across thousands of companies, they share real insights on model performance, cost reduction strategies, and building tools that actually work at scale.

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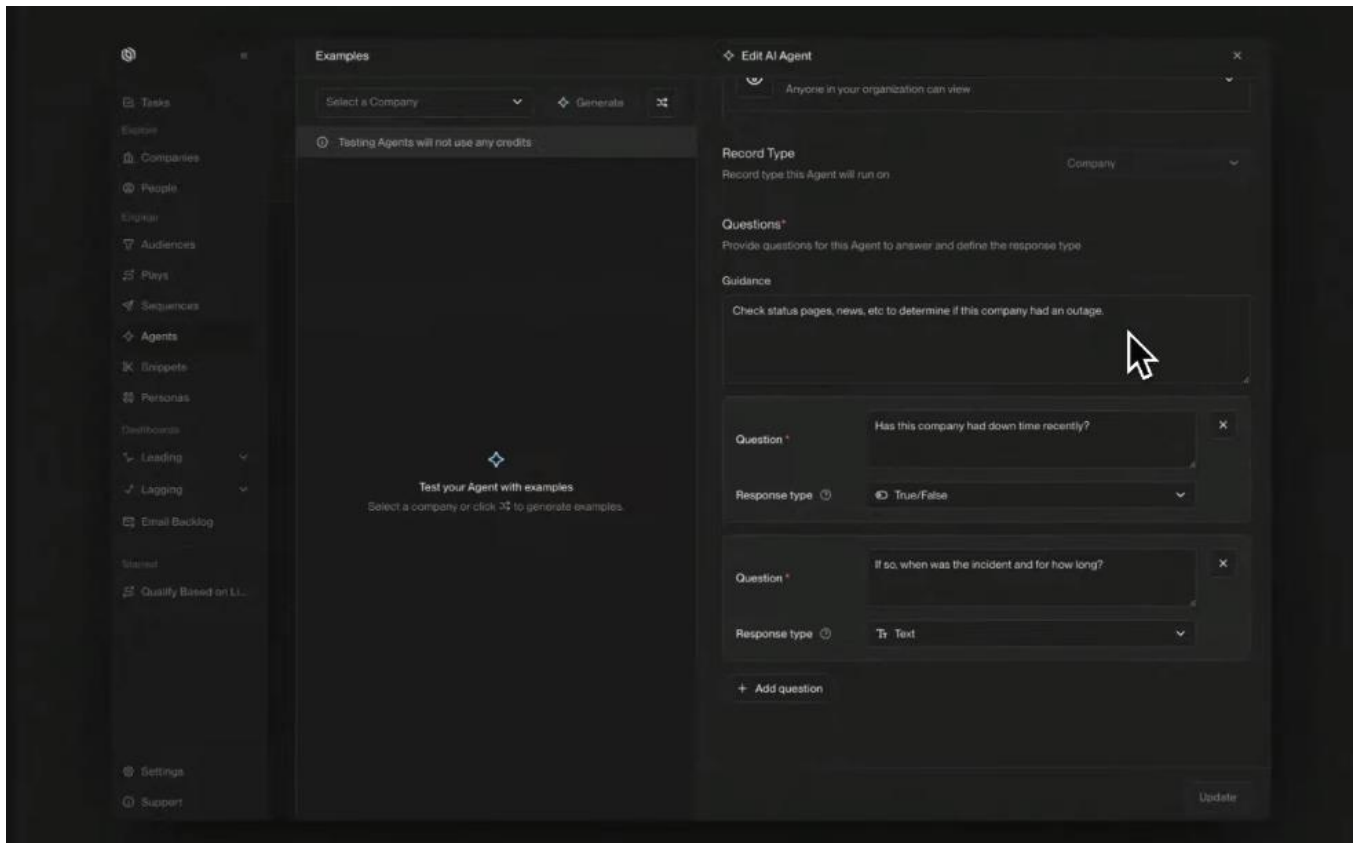
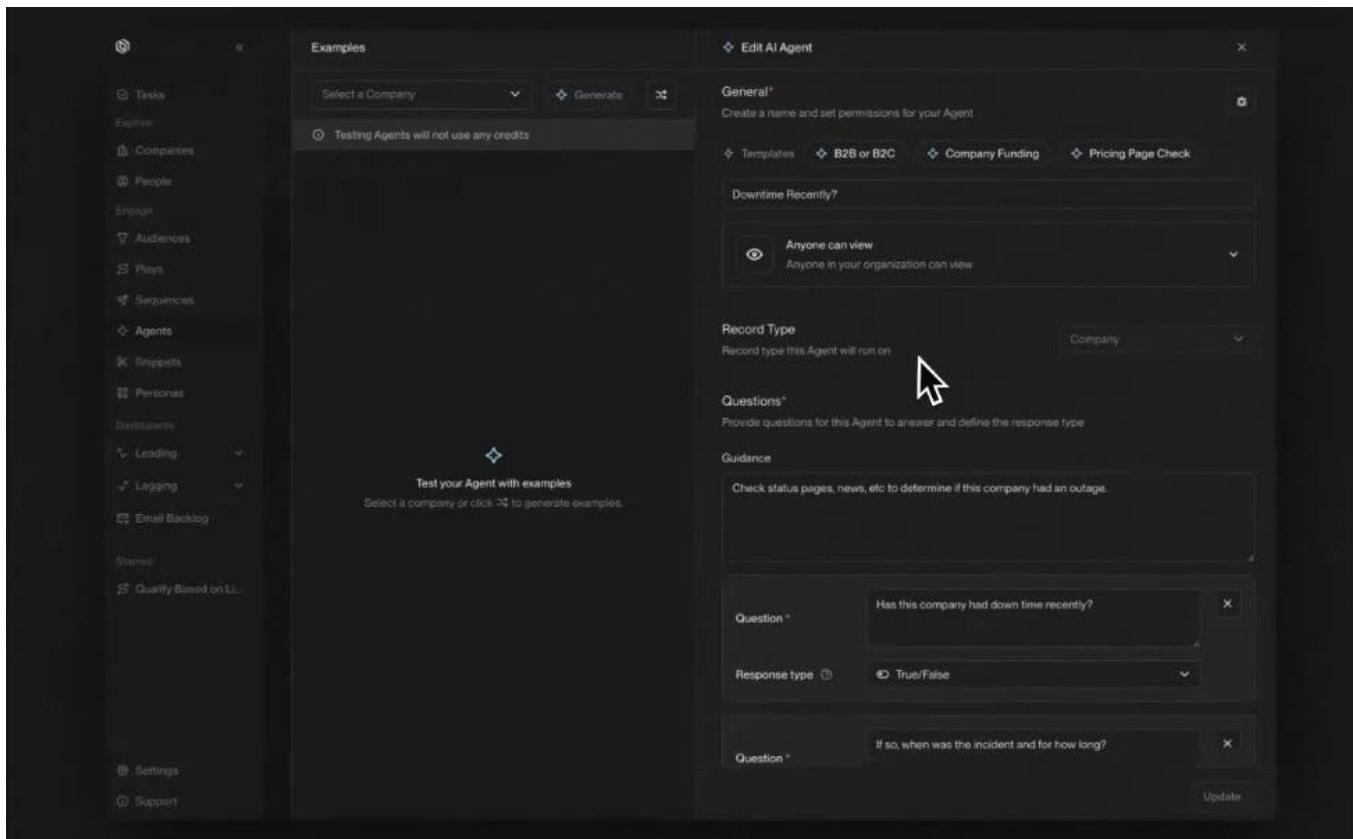
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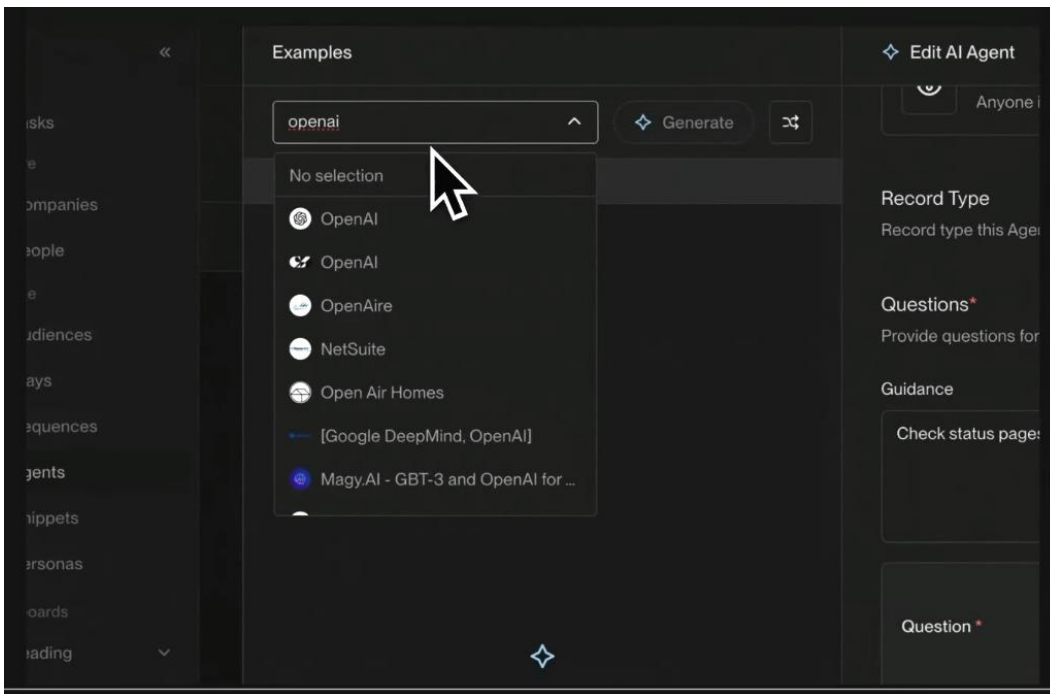
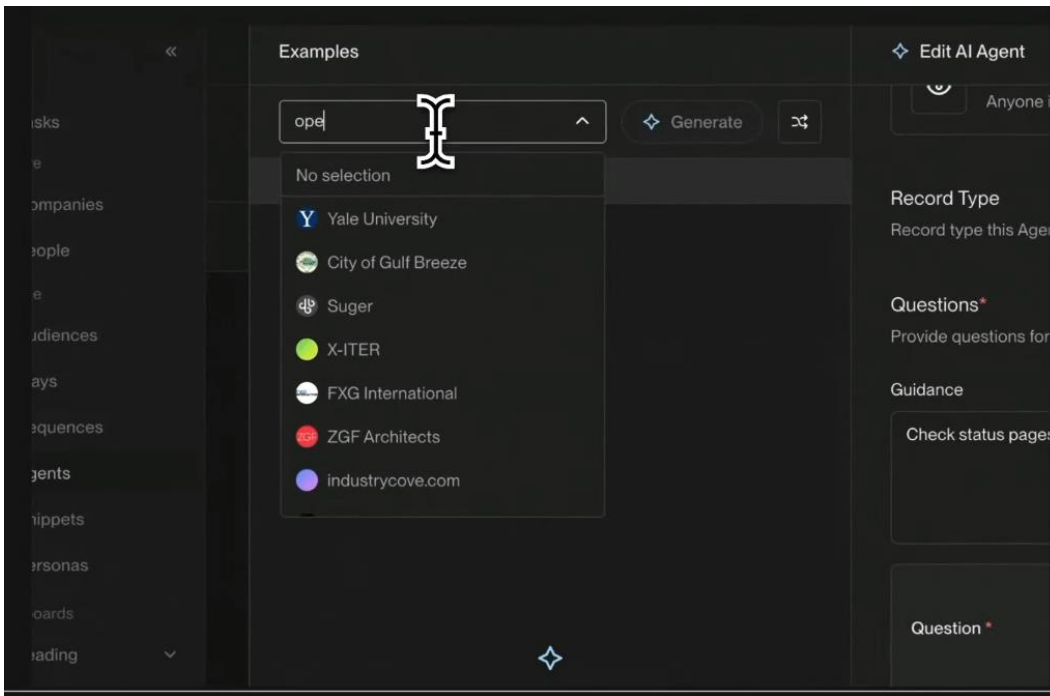


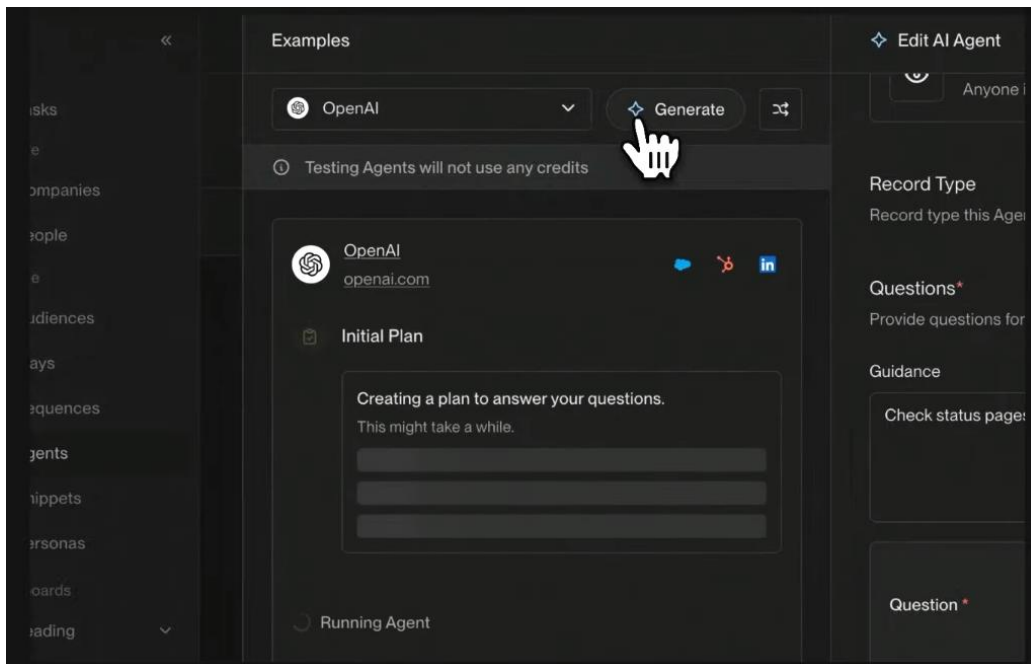
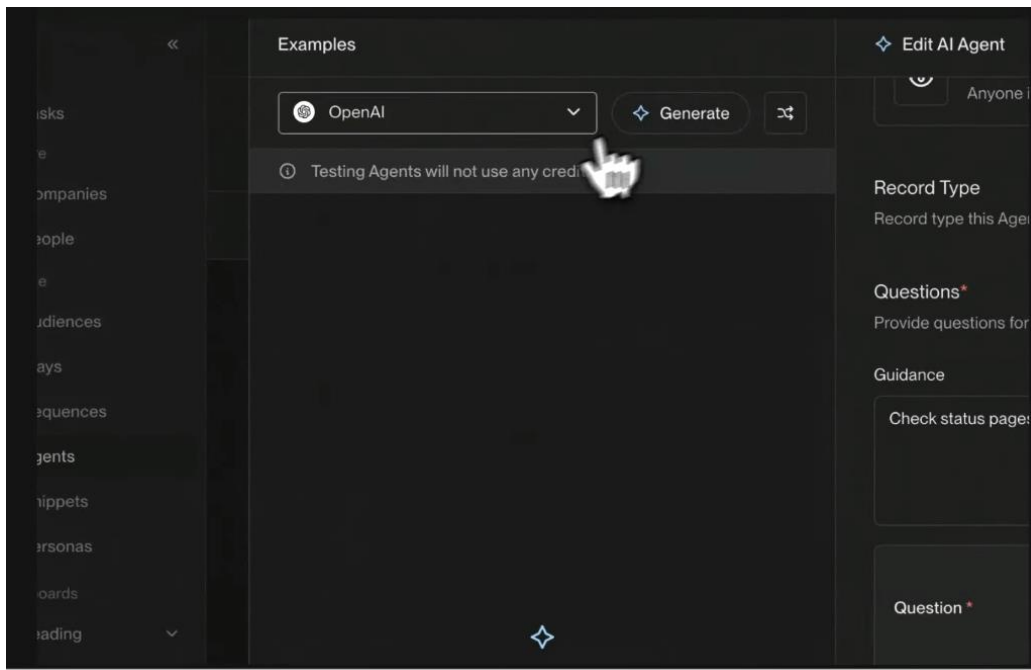
## Unify

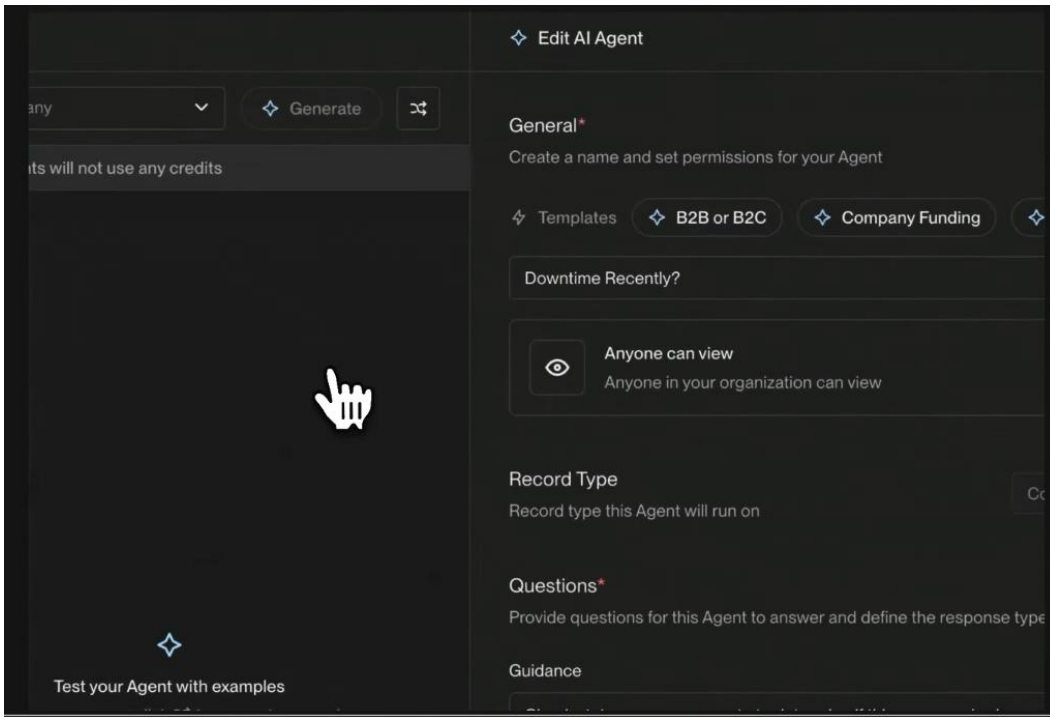
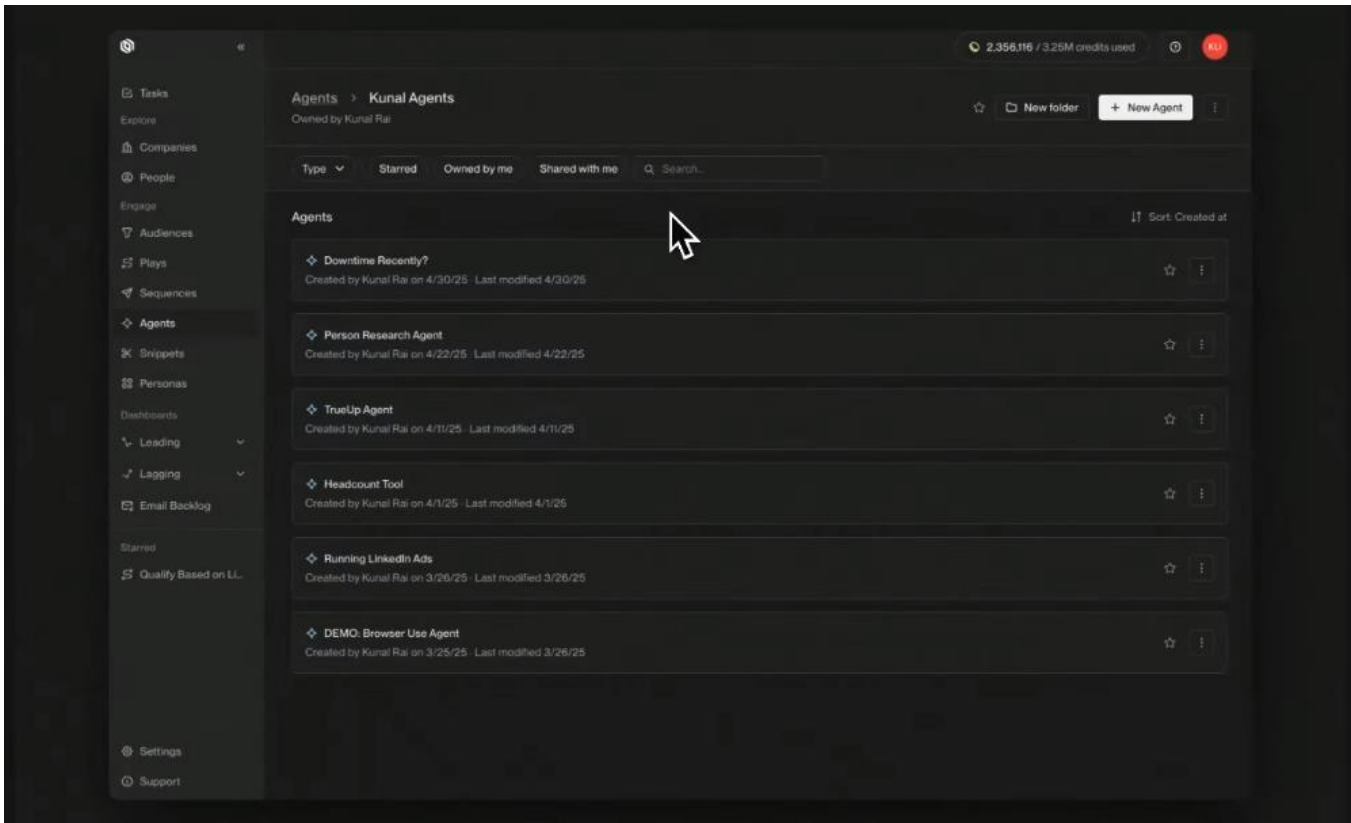
**Our mission is to make growth a science and help the best products win.**

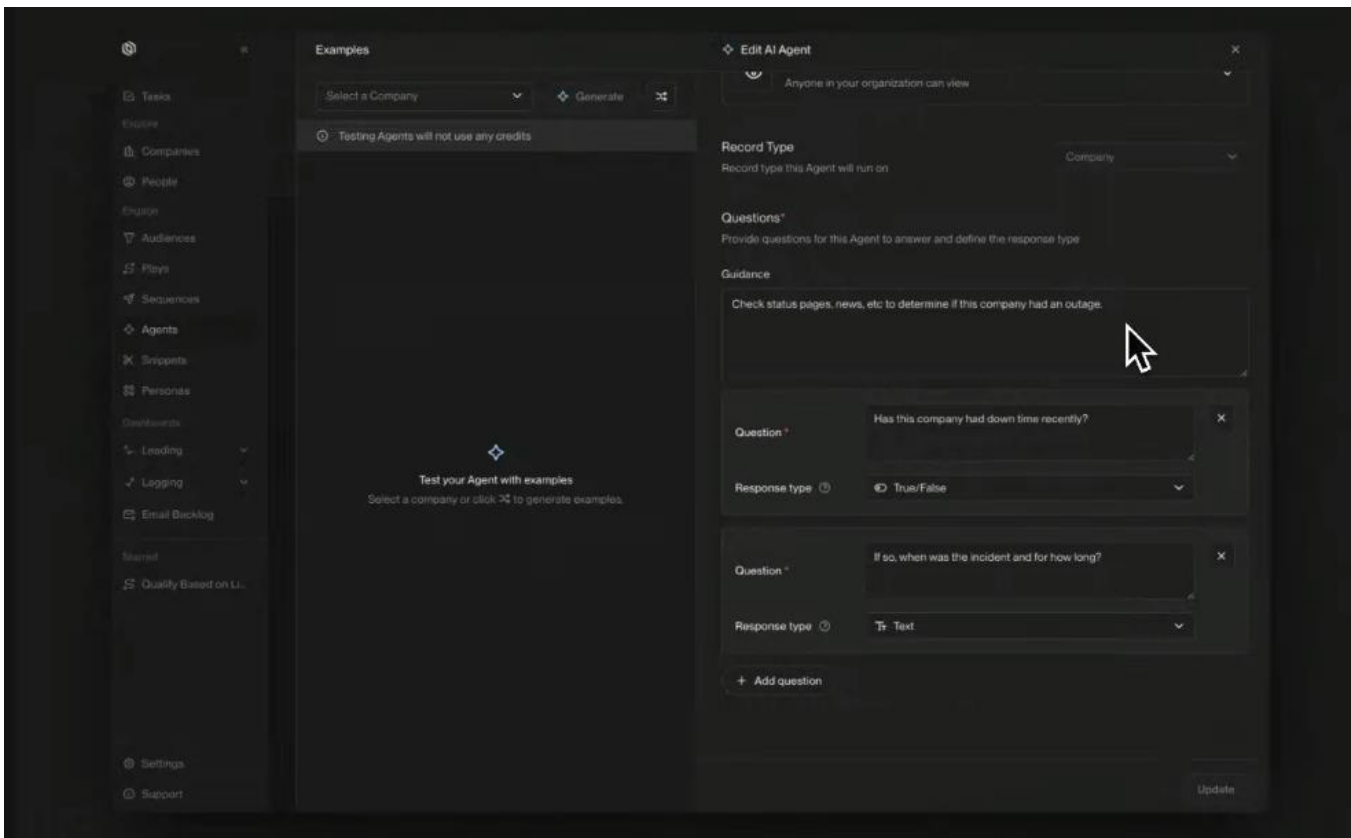
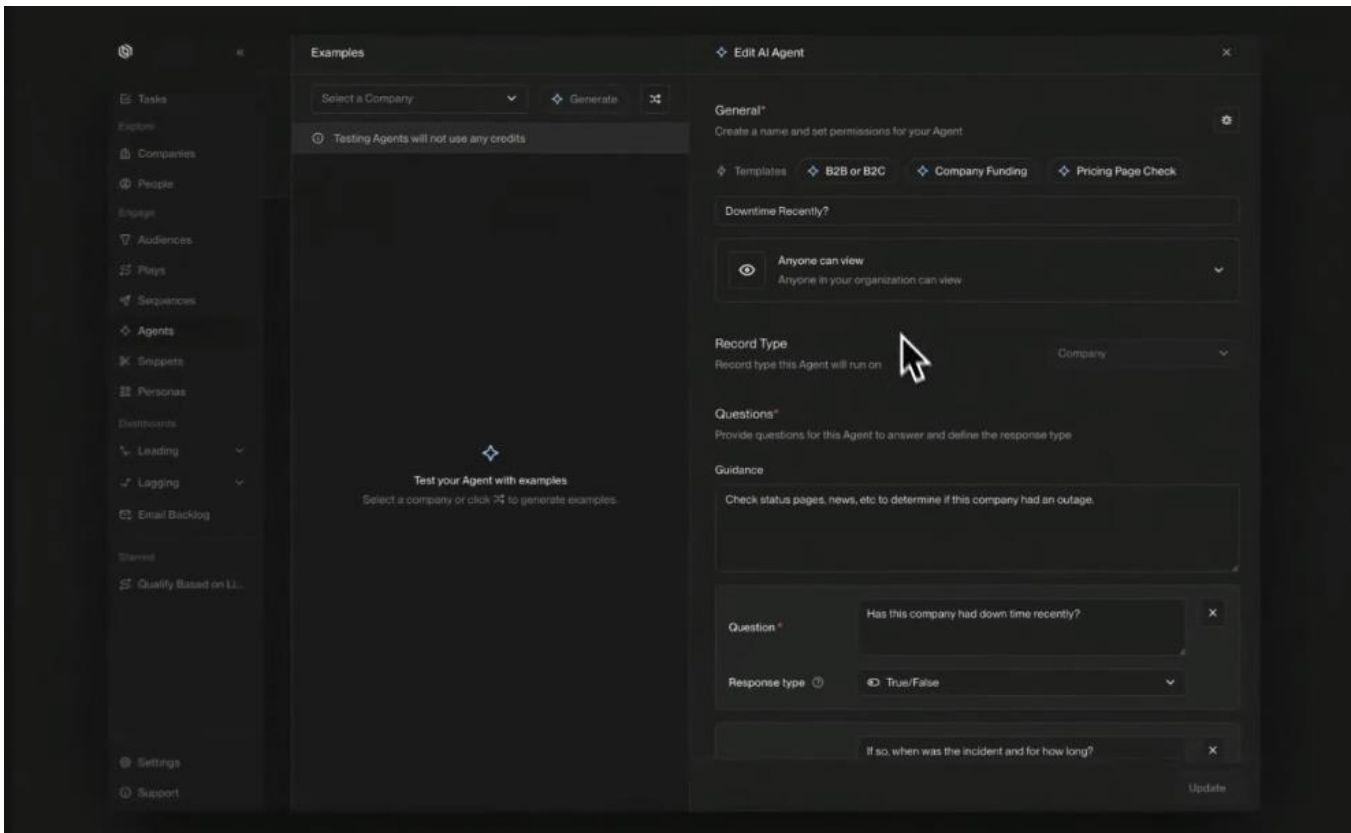
- We treat go-to-market as a search problem:
  - Find people and companies that have a problem your product uniquely solves
- To find those people and companies we run AI research agents

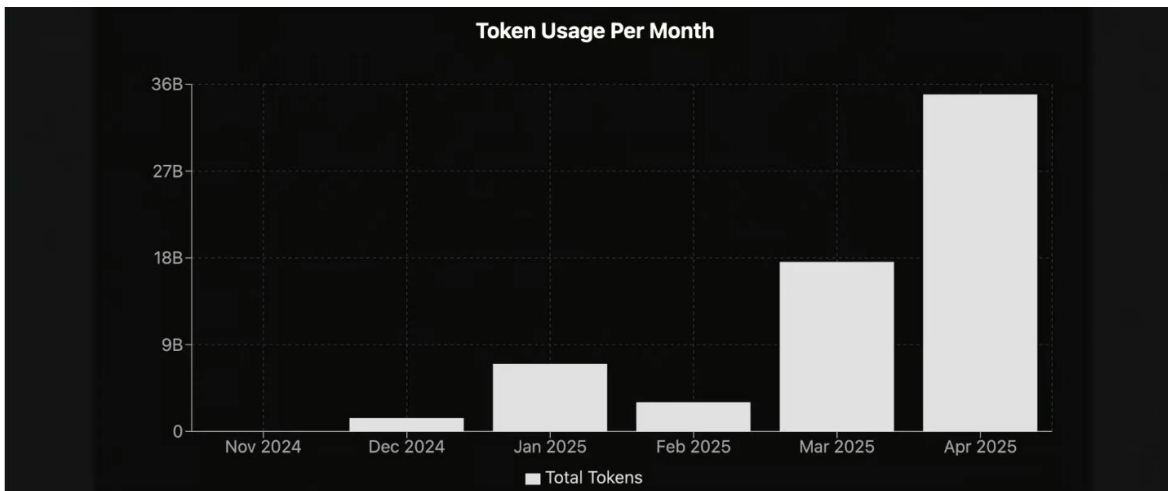










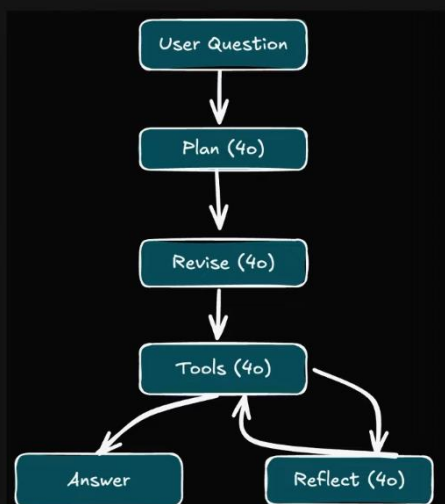


Some learnings from building and running  
generalized research agents at scale

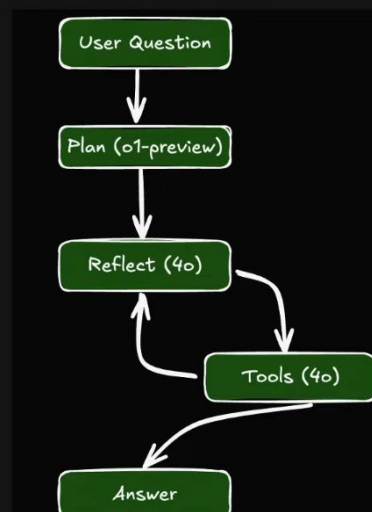
## Our V1s: Sam vs Connor

- ReAct = “reason then act” agent framework
  - Allows for corrective and reactive actions over the course of a research path
- Connor and Sam both built versions of this framework
  - Three tools: search the internet, search a website, and scrape a website

### SamBotMarkI



### ConnorAgent





# How do we know which is better?

- Before we built any evals or metrics we spent a long time looking through trajectories manually
  - **vibe check**
- We found that o1 produced *much* more thorough research plans

## 1600 Tokens (o1-preview)

## 600 Tokens (gpt-4o)

```
7 1. Analysis:
8 - What it's asking: Determine whether Canva primarily serves businesses (B2B -
9 Business to Business) or individual consumers (B2C - Business to Consumer).
10 - Context:
11 - B2B (Business to Business): Companies that sell products or services to
12 other businesses.
13 - B2C (Business to Consumer): Companies that sell products or services
14 directly to individual consumers.
15 - Relevance: Understanding Canva's primary market helps categorize their
16 business model and target audience.
17
18 2. How to Answer:
19 - Visit Canva's official website: [www.canva.com](https://www.canva.com).
20 - Explore the homepage and About Us section to see how they describe their
21 users.
22 - Look for product offerings and solutions tailored to individuals vs.
23 businesses.
24 - Check for features or pricing plans designed specifically for teams or
25 enterprises.
26 - Review any marketing materials, blog posts, or press releases that
27 mention their target audience.
28
29 3. Potential Mistakes/Pitfalls:
30 - Assuming exclusivity: Believing Canva serves only one market (either B2B or
31 B2C) without recognizing they may target both.
32 - Overlooking clues: Missing subtle indications of their primary market in
33 marketing language or product features.
34 - Misinterpreting services: Confusing services meant for professional individual
35 use with B2B offerings.
36
37 ---
38 Question 2: What is their pricing model?
39
40 1. Analysis:
41 - What it's asking: Identify which pricing models Canva uses from these options:
42 - Consumption-based
43 - Subscription
44 - Seat-based
45 - Free
46 - Context:
```

```
5 - Pitfalls: Avoid assuming B2B or B2C based solely on prominent enterprise or
6 consumer product features; confirm through information about their target audience and
7 marketing strategy.
8
9 Question 2:
10 - Analysis: Identify the type(s) of pricing model Canva uses.
11 - Relevant Context: Canva could have multiple pricing models across different
12 product offerings.
13 - Pitfalls: Ensure not to overlook mixed models like combining subscription and
14 consumption-based for certain features.
15
16 Question 3:
17 - Analysis: Check if Canva offers a tier where users have free access indefinitely
18 without significant feature restrictions.
19 - Relevant Context: A free tier is permanently free and could have basic features,
20 contrasting with a time-limited free trial.
21 - Pitfalls: Distinguish carefully between a free tier and a free trial to avoid
22 confusion.
23
24 Question 4:
25 - Analysis: Verify the availability of a time-limited trial period where users are
26 not charged.
27 - Relevant Context: A trial is typically offered to allow potential customers to
28 try out premium features.
29 - Pitfalls: Ensure not to confuse this with any permanently free offerings.
30
31 Question 5:
32 - Analysis: Find out Canva's pricing for the lowest-cost paid plan beyond any free
33 offerings.
34 - Relevant Context: Prices are often listed on pricing pages, but consider regional
35 variations in currency if relevant.
36 - Pitfalls: Avoid using outdated or promotional prices.
37
38 Question 6:
39 - Analysis: Discover the price for Canva's highest-cost plan with a listed price.
40 - Relevant Context: Some plans may require contacting sales, which might not
```



## 1600 Tokens (o1-preview)

## 600 Tokens (gpt-4o)

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28 ##Question 2: What is their pricing model?
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30 1. ##Analysis:
31   - ##What it's asking: Identify which pricing models Canva uses from these options:
32   - ##Consumption-based
33   - ##Subscription
34   - ##Seat-based
35   - ##Free
36   - ##Context:
37   - ##Consumption-based: Pay based on usage.
38   - ##Subscription: Pay a recurring fee for ongoing access.
39   - ##Seat-based: Pay per user or per seat.
40   - ##Free: Offers services at no cost indefinitely.
41
42 2. ##How to Answer:
43   - Navigate to ##Canva's pricing page: [www.canva.com/pricing](https://www.canva.com/pricing).
44   - Examine each ##plan available:
45   - ##Free Plan: Determine if they offer a free tier.
46   - ##Pro and Team Plans: Check if these are ##subscription-based (monthly or annual payments).
47   - ##Enterprise Plan: Look for ##seat-based pricing details.
48   - Read the ##features and pricing details to see how users are billed.
49   - Note any ##additional costs or ##consumption-based fees (e.g., paying for premium images).
50
51 3. ##Potential Mistakes/Pitfalls:
52   - ##Missing multiple models: Failing to recognize that Canva may use a combination of pricing models.
53   - ##Confusing terms: Misunderstanding the difference between seat-based and subscription models.
54   - ##Overlooking small print: Not noticing additional consumption-based charges for certain features.
55
56 ---
57
58 ##Question 3: Do they have a free tier?
59
60 1. ##Analysis:
61   - ##What it's asking: Confirm if Canva offers a free plan that users can access indefinitely without payment.
62   - ##Context: A free tier provides ongoing access without a time limit, unlike a free trial.
63
64 2. ##How to Answer:
65   - Check the ##pricing page for a plan labeled ##Free or similar.
66   - Verify that the free plan does not have a ##time restriction.
67   - Review the ##features included in the free tier to ensure it's a functional offering.
68
69 3. ##Potential Mistakes/Pitfalls:
70   - ##Confusing with free trial: Mistaking a time-limited trial for a free tier.
71   - ##Assuming limitations: Believing the free tier is too limited without verifying its capabilities.

```

```

offerings.
- ##Relevant Context: Prices are often listed on pricing pages, but consider regional variations in currency if relevant.
- ##Pitfalls: Avoid using outdated or promotional prices.
38
##Question 6:
39
40 - ##Analysis: Discover the price for Canva's highest-cost plan with a listed price.
41 - ##Relevant Context: Some plans may require contacting sales, which might not provide a public price to assess.
42 - ##Pitfalls: Do not count plans that require contacting sales unless a specific price is listed.
43
44 ##Question 7:
45
46 - ##Analysis: Determine if there is an enterprise plan that requires customers to contact sales for pricing.
47 - ##Relevant Context: Enterprise plans often come with customized features and pricing.
48 - ##Pitfalls: Do not assume based on terminology alone that contacting sales implies enterprise pricing.
49
50 ##Overall Plan:
51
52 1. ##Website Search: Start by searching Canva's website for terms like "B2B", "B2C", "target audience", and "pricing". This can quickly yield relevant results for various questions.
53
54 2. ##Internet Search: Conduct Google searches using queries like "Canva B2B or B2C", "Canva pricing model", "Canva free tier vs free trial", and "Canva enterprise pricing". This will provide supplemental information and sometimes direct access to press releases and interviews where Canva discusses their strategy.
55
56 3. ##Scrape Webpages: Scrape Canva's pricing and product/service pages. This will help confirm the different tiers, associated features, and pricing models.
57
58 4. ##Evaluate Data: Analyze the collected information to answer each question accurately:
59   - Determine the primary market focus (B2B or B2C).
60   - Identify all pricing models: consumption, subscription, etc.
61   - Confirm the presence of a free tier and/or free trial.
62   - Ascertain specific pricing details for both the cheapest and most expensive listed plans.
63
64 5. ##Conclude and Send Response: Compile the findings and send the final answers to the user, ensuring clarity and completeness of the responses.
65
66 By following this systematic approach, the assistant should efficiently gather accurate information to answer all questions regarding Canva's business and pricing strategies.

```

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54   - Confirm the presence of a free tier and/or free trial.
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57
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60 By following this systematic approach, the assistant should efficiently gather accurate information to answer all questions regarding Canva's business and pricing strategies.

```

## o1-preview question 4

### \*\*Question 4\*\*

**Description:** "Do they have a free trial?"

**Value Type:** BOOLEAN

#### \*\*1. Brief Analysis\*\* - A "free trial" is a time-limited period during which users can access services for free. - After the trial, payment is typically required to continue using the service.

#### \*\*2. How to Answer\*\* - "Check for Free Trial Offers": - Look for banners or notices on the website offering a free trial. - "Review Signup Options": - During the account creation process, see if Canva provides trial credits or time-bound access. - "Read Terms and Conditions": - Verify the duration and limitations of the free trial.

#### \*\*3. Potential Mistakes or Pitfalls\*\* - "Assuming No Trial Without Checking": Concluding there is no free trial without thoroughly investigating. - "Overlooking Registration Requirements": Not noting if a credit card is required to start the free trial. - "Confusing Free Tier with Free Trial": Mistaking ongoing free services for a temporary free trial.

## gpt-4o question 4

**Question 4**

- **Analysis:** Determine if Canva offers a time-limited free access to their services termed as a free trial.

- **Relevant Context:** Free trials are time-bound and a common way to allow new users to test services.

- **Pitfalls:** Do not confuse free trials with unrestricted free tiers.

## Building actual evals

- **Accuracy:** percentage of questions answered correctly by the agent
  - Hand labeled a set of 100 companies for each eval
- We built initial eval sets for expected use cases
  - Business Model (ex. "Is this company B2B or B2C")
  - Firmographics (Find the headquarters, company size, operating locations)
  - Technographics (What technologies does this company use?)

## Showdown: ConnorAgent vs SamBotMarkI

	Industry Classification	Firmographics	Account Qualification	Technographics
ConnorAgent	86	48	58	81
SamBotMarkI	75	38	59	72

## Learnings from initial evals

- Reasoning models can have an outsized impact on downstream actions for an agent
  - o1-preview was worth the latency and cost to pre-plan
- Accuracy based evaluations were great for establishing a baseline
- **No clear insights into how to improve the agents from accuracy based evals alone**

## Where do we go from here?

- Change the graph of the Agent? No
- Change the models and prompts? **Yes**
- Add more tools? **Yes**

## Model and Prompt Changes

### Model Changes: Performance & Cost

#### Problem:

o1/o3/o1-pro are \$\$\$ and slow

#### Solution:

- Try different models and providers to see if we can match performance
- No other models matched or exceeded o1 until gpt4.1

#### Outcome:

**Agent Run with o1: ~\$0.35, Agent Run with gpt4.1: ~\$0.10**

# Model Changes: Performance & Cost

Model	Industry Classification	Firmographics	Account Qualification	Technographics
o3	0.98	0.40	0.58	0.80
Deepseek R1	0.97	0.34	0.58	0.81
GPT-4.1	0.98	0.40	0.57	0.75
Claude 3.7	0.98	0.32	0.57	0.75
o1	0.98	0.31	0.54	0.78
Gemini-2.5	0.98	0.27	0.57	0.78

# Prompt Changes: Date Formatting

**Problem:**

The agent would incorrectly compare dates unless they were in the exact same format  
example: 5/14/2025 3:00PM PT vs May 15th 2024

**Solution:**

Adjust the date format and inject current date into all node prompts

**Outcome:**

Agents now process temporal data accurately

# Prompt Changes: Tool Calling

**Problem:**

Agents make “throwaway” agent tool calls

**Solution:**

Change Pydantic models for tools to accept specific configuration settings

**Outcome:**

Agents select the right tools more frequently and can surface more relevant information with more precise tool inputs



# Prompt & Model Change Learnings

- Agent cost 📉📉📉 from swapping o1 to 4.1 with no quality change
  - Just wait for a new model to make everything better
- There are tons of edge cases (like the date issues) that are difficult to find through metrics
  - **Vibe checking is still a top evaluation methodology**
- Models tend to spike in different use cases and system wide evaluations don't highlight differences
- Increasing tool variety = more information is pulled into context → context management is critical

## What tools to build?

2 criteria to consider for new tools:

- Is there a customer play this could power on day 1 of launching?
- Will this generalize to many customers' future use cases?

We wanted to build the tools that would be step function improvements for everyone using the Unify agent

## Tools we built

- Deep Internet Search: upgrade to how we search the internet
- Browser Access: use Chrome to access websites that aren't scrapable
- Search HTML\*: ability to scrape and parse raw HTML
- Dataset Access\*: provisioning access to internal data feeds

*\*we don't have slides on these tools, but happy to chat about them after if folks are interested*

# Deep Internet Search: Internet search is hard

- The internet has all data, but surfacing the right data for entity specific queries is a challenge (i.e. "what is the privacy policy of samllminference.ai")
  - Google - deal with SEO
  - OpenAI / Perplexity - introduce an uncontrollable variable with AI summarization of search results
- **Models were looking at google search previews as a source of truth**
- Agents should be able to reproduce human research trajectories
  - **the trajectories you used to do before ChatGPT**

## Deep Internet Search: Upgrading from Google

```
class InternetSearchInput(BaseModel):  
    """Input schema for the internet search tool."""  
  
    query: str = Field(description="Search terms")
```

```
class InternetSearchInput(BaseModel):  
    """Input schema for the internet search tool."""  
  
    query: str = Field(description="Search terms")  
    category: Optional[ExaCategory] = Field(  
        default=None,  
        description="Category to search within",  
    )  
    livecrawl: Optional[bool] = Field(  
        default=False,  
        description="If this search requires time-sensitive data or recent data",  
    )  
    includes_phrase: Optional[str] = Field(  
        default=None,  
        description="Return results that contain a specific phrase",  
    )  
    constrain_by_domain: Optional[str] = Field(  
        default=None,  
        description="Limit results to a specific domain",  
    )  
    published_date: Optional[datetime] = Field(  
        default=None,  
        description="Return results published after this date",  
    )
```

## Deep Internet Search: Upgrading from Google

### before

```
[  
  {  
    "title": "Canva Pricing: The Complete Guide in 2024 - Ecomm.Design",  
    "url": "https://ecomm.design/canva-pricing",  
    "preview": "Canva can be accessed for free, or the Canva Pro plan will cost $14.99 per month or $119 per year. Canva for Teams has variable pricing...",  
  },  
  {  
    "title": "How Much is Canva Pro: Canva Pricing & Plans 2025",  
    "url": "https://thimpress.com/Design",  
    "preview": "We'll explore the features you get with Pro, its affordable cost (only $13 a month!), and the 30-day free trial to see if it's the right fit for...",  
  },  
  {  
    "title": "How Much Does Canva Cost Per Month in 2024?",  
    "url": "https://hubdigitalcontent.com/tools/how-much-does-canva-cost",  
    "preview": "Canva Pro costs $15 a month. If you get an annual subscription, you save 34% and pay only $120 per year. Canva for Teams costs $10 per user per month.",  
  },  
  {  
    "title": "Canva Pricing Guide 2025: Free, Pro, Teams & More",  
    "url": "https://www.stockphotosecrets.com/buyers-guide/canva-pricing-guide",  
    "preview": "Canva Pro, the paid option for individuals, goes for between $10 and $15 monthly and is packed with value. Here is what you get with your membership:"  
  }  
]
```

### after

```
{  
  "title": "Compare Free, Pro, Teams and Enterprise plans",  
  "url": "https://www.canva.com/en/pricing/",  
  "text": "Calculate for your team Save from 16% with yearly Design anything and bring your ideas to life. No cost, just creativity. Features you'll love: Easy drag-and-drop editor 2M+ professionally designed templates 1000+ design types (social posts, docs, presentations, sheets, and more) 4.5M+ stock photos and graphics AI creative partner for design, image and text generation Build interactive designs and experiences with AI Bring multiple formats into one design Design printing and delivery Canva Pro Unlock premium content, more powerful design tools, and AI features. Everything in Free, plus: Unlimited access to premium templates 140M+ photos, videos, graphics, audio 1000 Brand Kits to manage your brand Quickly resize and translate designs Remove backgrounds in a click Create, resize, translate and remove backgrounds at scale Boost creativity and productivity with 20+ AI tools Plan and schedule social content Canva Teams Transform teamwork, grow your brand, and simplify workflows. /year per person Minimum 3 people (US$300/year) Everything in Pro, plus: Scale your brand and centralize assets Ensure brand consistency with approvals Edit, comment, and collaborate in real time Generate on-brand text and visual assets with AI Team reports and insights Import and sync data from your favourite external sources ISO 27001 certification and SOC 2 Type II compliance Canva Enterprise Empower your organization with an all-in-one workplace solution. Get in touch to learn more Everything in Teams, plus: Centrally manage multiple teams and brands Set individual or group design approvals Control access to Canva's content and templates Indemnification for AI output Advanced security and admin controls (including AI permissions) SCIM license provisioning Custom apps and integrations Priority customer support Design support from Enterprise Studio creative team Dedicated customer success
```

# Browser Access: How do humans do it (again)?

- **Problem:** There is a lot of rich data online that isn't accessible through basic scraping
  - Examples: Google maps images, interactive search experiences, etc
- **Solution:** Allow the Unify agent to use the browser the same way we would

## Browser Access: A sub agent

- The browser access tool is implemented as a sub agent
- It is given a task, which it decomposes into a browser trajectory using o4-mini and executed with computer-use-preview

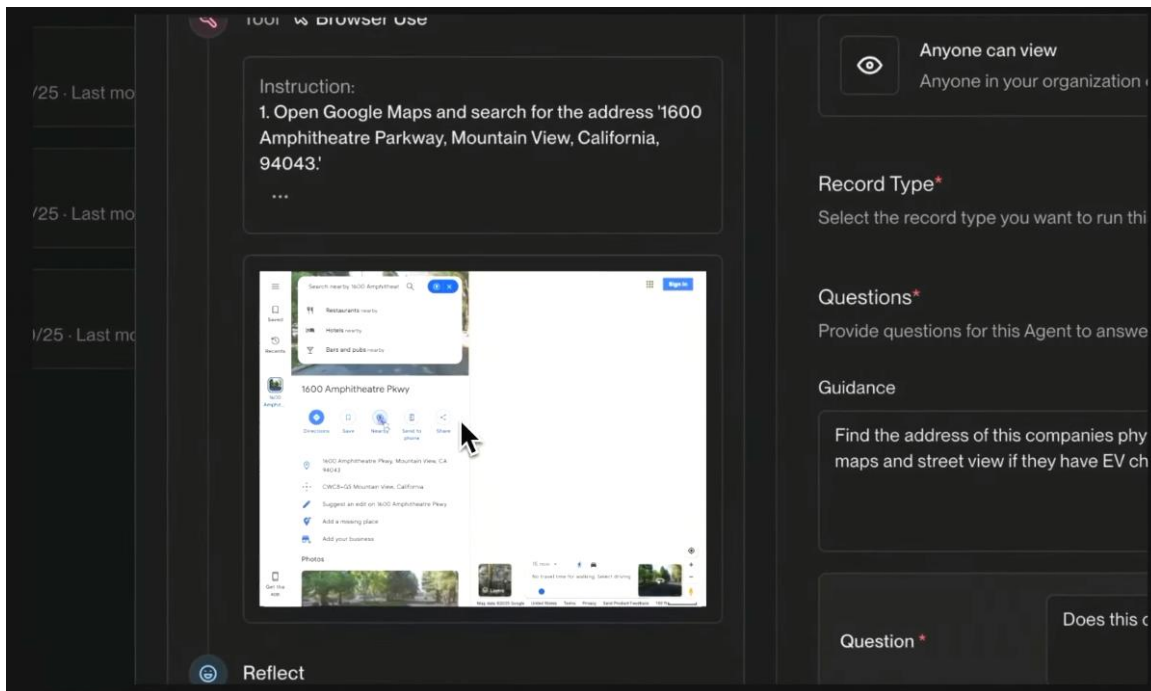
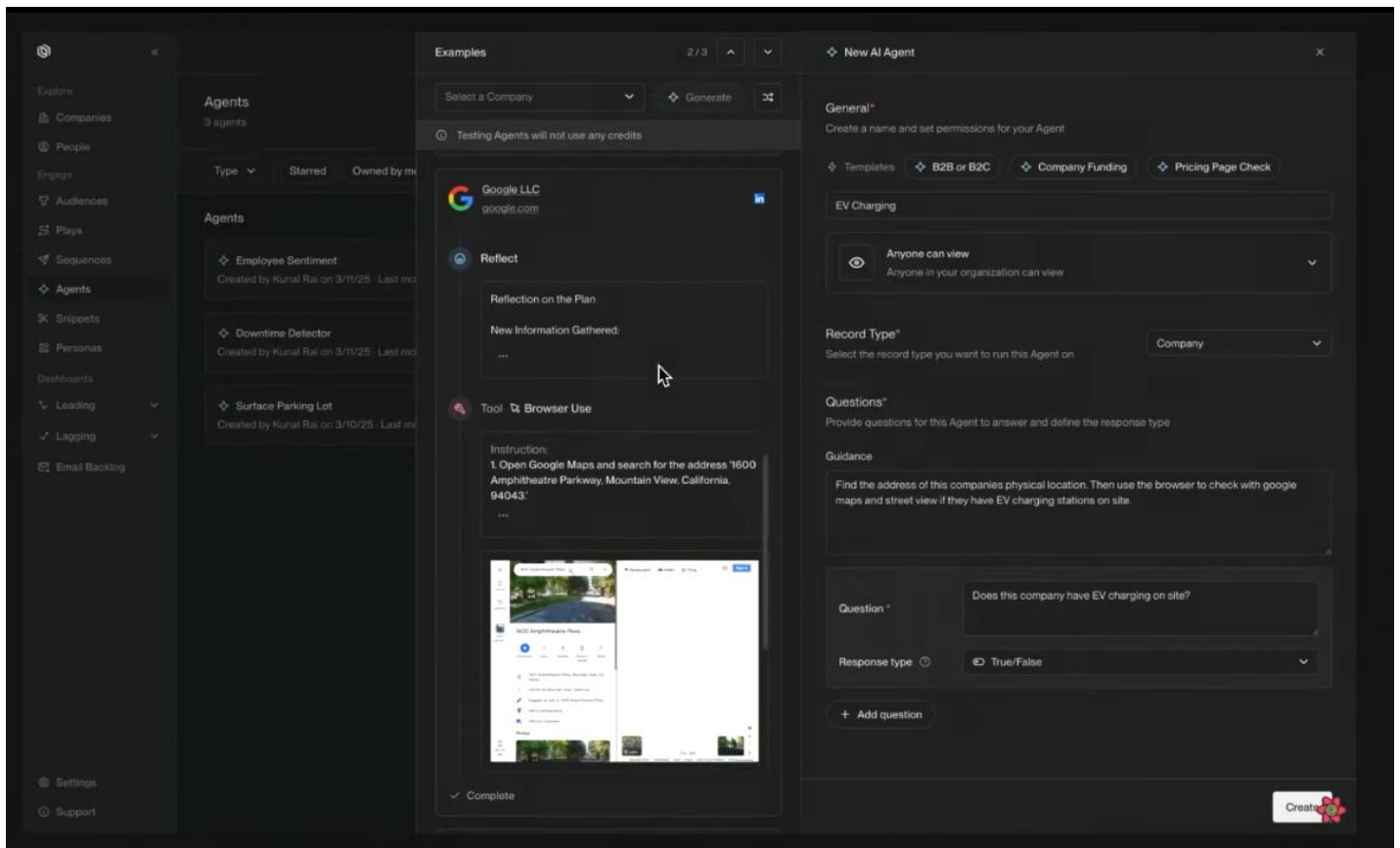
AI

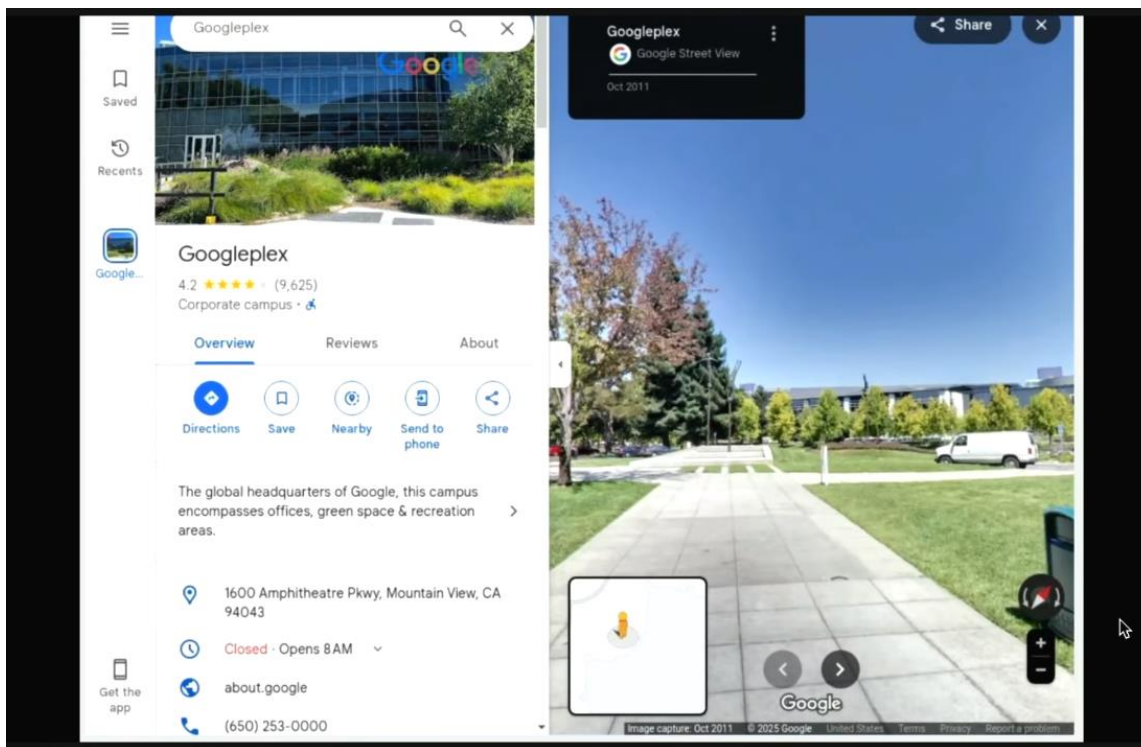
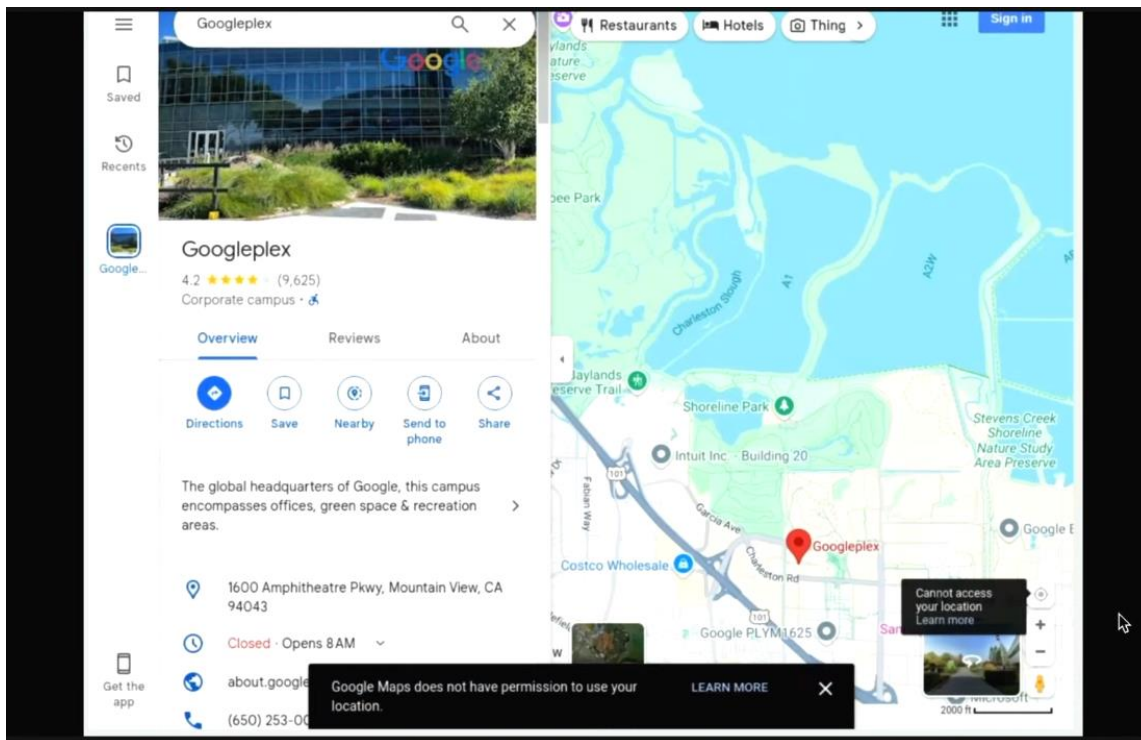
Here's a clear, step-by-step plan to complete the task:

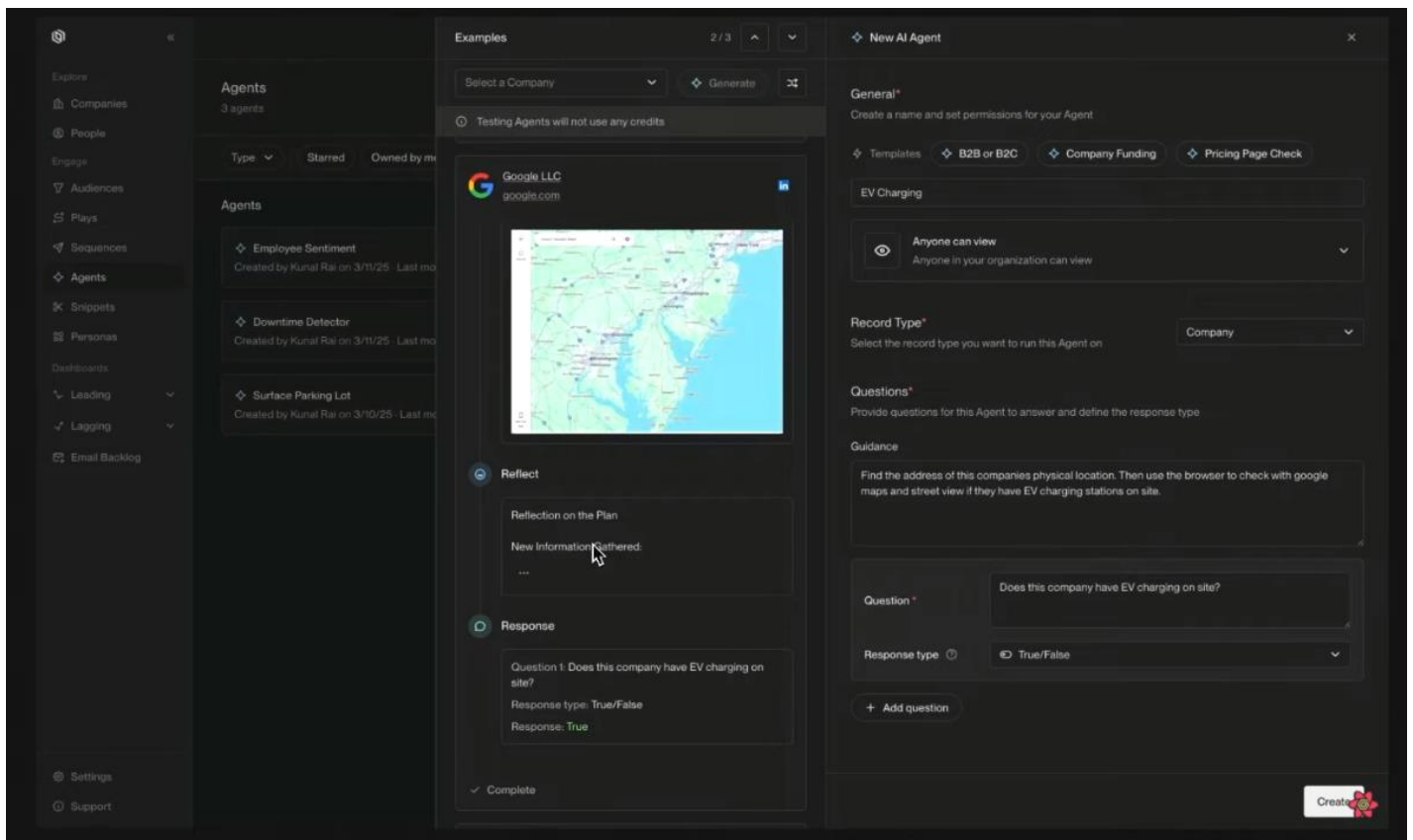
1. Confirm you are at <https://www.google.com/maps> in your browser.
  2. In the search bar at the top left of the page, type the address "6600 North Military Trail, Boca Raton, FL 33496" and press Enter (or click the search icon).
  3. Once the map centers on that location, locate the yellow "Pegman" icon (usually at the bottom right corner). Click and drag the Pegman onto the map near the address to enter Street View.
  4. In Street View, manually navigate and look around the area near the Office Depot address. To ensure you cover the vicinity, slowly pan around until you spot any nearby physical parking lots (for example, large open areas with marked parking spaces).
  5. As you survey the area in Street View, note if a parking lot is visible near the Office Depot. You may have to adjust your view or reposition Pegman slightly to get the best angle.
  6. Optional/Alternative: If necessary, zoom out from Street View to see a map overview and locate any parking lot icons before returning to Street View for a closer look.
  7. Based on your observation, record whether a parking lot is present or not.
- Following these browser actions should allow you to complete the assignment successfully.

The screenshot displays the Unify AI Agent interface. On the left is a sidebar with navigation options: Explore, Companies, People, Engage, Audiences, Plays, Sequences, Agents, Snippets, Personas, Dashboards, Loading, Logging, and Email Backlog. The main area is titled 'Agents' and shows a list of existing agents: 'Employee Sentiment', 'Downtime Detector', and 'Surface Parking Lot'. A 'New AI Agent' modal is open, showing the configuration for 'Google LLC'. The 'General' tab is active, displaying the agent's name, permissions (B2B or B2C, Company Funding, Pricing Page Check), and a record type of 'Company'. The 'Questions' section contains a question: 'Does this company have EV charging on site?' with a 'True/False' response type. The 'Guidance' section provides instructions: 'Find the address of this companies physical location. Then use the browser to check with google maps and street view if they have EV charging stations on site.' The 'Examples' section shows a 'Reflect' tool with a task: 'Reflecting on the plan, the primary focus is to determine whether Google LLC has EV charging stations on-site at their physical locations. The plan involves identifying...'. The 'Internet Search' tool is also visible, showing search results for 'Google headquarters address'.









## Tool Learnings

- We can't be reliant on naive internet search and scraping
  - SEO, misleading Google previews, and incorrect entity resolution make search very challenging for an agent
  - Deep search massively reduced misinterpretation of internet results
- Some tools unlocked whole new categories of questions the agent could answer
  - The HTML tool massively improved technology detection
- When giving the agent access to more tools, it emergently began cross checking sources with multiple tools

## New Champion: KunalBrowserAgent

	Industry Classification	Firmographics	Account Qualification	Technographics
ConnorAgent	86	48	58	81
SamBotMarkI	75	38	59	72
KunalBrowserAgent	98	48	66	86

## Next Steps: Improving Evals

- Evaluations should highlight problems and allow for quantitative assessment of gaps
- Accuracy based metrics are helpful but not a good eval for iteration
- Hard to evaluate models at qualitative tasks without using lots of human eval or llm-as-a-judge
- Pulling in more customer use cases as benchmarks for new tools and general agent performance

## TL;DR

- Unify is building a system of action to make growth a science and help the best products win
- The more abstract the task, the more important evals are (but vibe checks are still very important)

Questions?

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