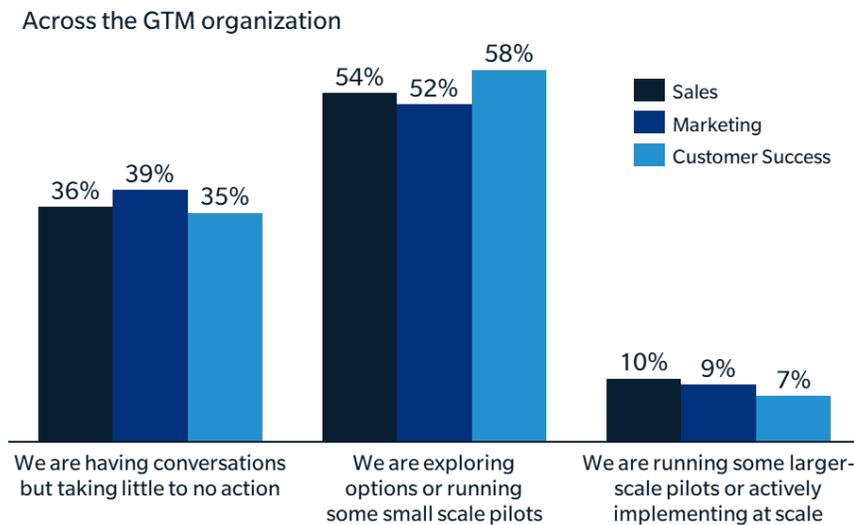


## Understanding the Spectrum of AI Capabilities for GTM

In conversations with go-to-market leaders, a common thread is emerging. Leaders see artificial intelligence (AI) as a great unknown with immense potential, but many are unsure where to start. It is early in the game. Nearly 40% of S&P 500 companies mentioned AI on their latest earnings calls with analysts, but [only 16% mentioned](#) it in their regulatory filings, showing that the hype is there but that AI is only beginning to be a factor in business outcomes.

Leaders need to balance looking forward into an AI-enabled future while maintaining momentum through the rest of 2023 and into 2024. Use case gathering and low stakes experimentation are great ways to understand how AI can drive value creation through four key areas: improved sales productivity, reduced sales and marketing expense, enriching the employee experience, and enhanced decision-making. In our latest CEO Survey, 54% of sales organizations were exploring options and implementing small experiments with AI, while 10% were already expanding to larger-scale AI programs (see Figure 1).

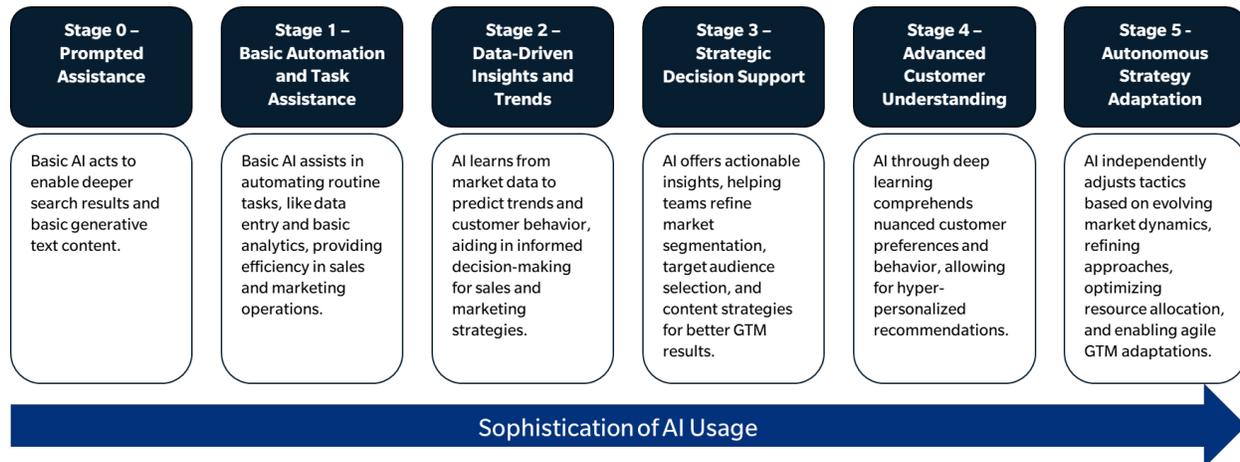
**Figure 1 | Generative AI Utilization**



Base: 113, unless otherwise stated  
 Source: SBI Q3 2023 CEO Survey

To aid in discovery and experimentation, SBI has created the AI Capabilities Spectrum (see Figure 2). This framework provides guidance that practitioners can follow along their AI journeys, from better search engine functionality to autonomous decision-making and strategy adjustments. In this article, we will explore the stages of the framework and discuss example use cases.

**Figure 2: SBI's AI Capabilities Spectrum**



Source: SBI, Inc.

## Stage 0 — Prompted Assistance

Prompted assistance is a foundational stage of AI adoption. This stage utilizes basic applications — particularly large language models (LLMs) such as ChatGPT and other platforms like Microsoft Bing or Google Bard — to generate text-based outputs directly from user prompts. Think of this stage as what the recent surge of AI popularity is concerning: better, more direct, and conversational search.

One example use case in this stage includes gathering basic information for sales call prep, i.e., the customer/prospect’s background, company information, and industry information. Another sales-focused use case involves the generation of battlecards to show a competitive analysis that’s customized for the sales opportunity and persona type of the customer/prospect.

A key point to consider at this stage is whether to create a private LLM instance for your company, which can be trained on your data, or leverage the cheaper public model.

At this stage, cultural impact is low. AI should naturally augment the work being done by the GTM team with minimal disruption or required change management. However, leaders will invest in prompt guidance, enablement, and training for their sales reps to ensure they get the most out of the tools.

## Stage 1 — Basic Automation and Task Assistance

Building on the prompted assistance, Stage 1 is focused on automating routine tasks, like data entry and basic analytics. The goal here is to boost efficiency in operations and reclaim time for the go-to-market (GTM) team.

One example use case in this stage is utilizing AI to play devil's advocate and practice handling objections ahead of sales calls. Sellers should be doing this exercise ahead of calls with their counterparts now, but by leveraging LLMs, like ChatGPT, sellers can prepare on their own by sharing their pitch with AI and interacting with it as though it were a customer/prospect.

Another use case at this stage is AI note-taking. During a call, an AI bot can scribe notes down, then summarize the meeting into key takeaways, action items, and follow-up items. A further extension, depending on which vendor is selected, is a plug-in to the customer relationship manager (CRM) to update the customer's/prospect's record with the meeting notes. This use case would require a more specialized product than ChatGPT or other widely available LLMs. Be sure that the AI you select has compatibility with your CRM if you want to have the tie-in for automated record updates.

## Stage 2 — Data-Driven Insights and Trends

In the next stage, AI learns from market data and predicts trends and outcomes to inform human-based decision-making. This stage of adoption empowers users with better, forward-looking information based on past outcomes and current information.

Stage 2 use cases combine data from disparate sources but rely on the GTM team to provide oversight and editorial support to the AI's output. An example of this is CRM updating. The AI bot will take information gathered in real time from seller-prospect interactions and provide updates for the CRM system, based on words used, historical outcomes from similar discussions, and utilization of the sales process. The system would be rewritable by users of the CRM.

Software providers like HubSpot, Salesforce, and Zoho CRM are all providers of this sort of functionality. While the AI would train on historical CRM data and additional rules (like sales process steps), significant data beyond this silo is not needed for the AI to properly function.

Another use case at this stage of adoption is lead scoring and qualification. The AI determines whether a lead fits within provided parameters, extrapolates against historical fits, and provides recommendation for qualification. Beyond that, the AI ranks leads against each other's probability of success to give sellers and marketers guidance on how to proceed efficiently with scarce time. Salesforce and 6Sense are examples of providers of this application of AI.

Stage 2 utilization requires a more sophisticated approach to data science than prior stages. Here, your data strategy must include collating data across sources. This makes data integrity and ensuring that various systems align a key to success.

## Stage 3 — Strategic Decision Support

This stage of AI adoption shifts from static analysis to incorporating larger data sets and greater predictive power, to providing actionable insights that help teams refine their GTM strategies like segmentation and audience selection. Stage 3 leverages AI as a strategic partner in decision-making, providing specialized analysis. In the prior stages, the analysis is more generalized.

An example of how to use AI at this stage is customer engagement analysis. The tool tracks product usage, human interactions, and engagement with marketing outreach to determine the customer's overall engagement and recognize when a customer is moving in the wrong direction.

This stage of insight can surface at-risk renewals, focus customer success functions, and sharpen marketing campaigns. Several vendors are active in this space, e.g., Staircase.ai, Nuance, and Airship, among others.

Sales support bots are another use case for Stage 3. In this application, the AI supports the seller interactively and in real time during interactions with customers and prospects. The AI can monitor the conversation, suggest cross-sell and upsell opportunities, and recommend material to be shared from the company's knowledge management system on the fly. Leveraging this technology would make seller interactions more efficient and could reduce the need for follow-up meetings to discuss content that the seller is not prepared for as the conversation deviates from plan.

At Stage 3 and beyond, your data strategy must account for the tradeoff between data collection volume and accuracy and AI performance. Feeding massive amounts of data into the system for training purposes will increase its accuracy, but performance time will likely suffer. The inverse is also true. If a small training set is used, responses will likely be fast, but output quality will suffer.

## Stage 4 — Advanced Customer Understanding

Moving another stage along the adoption spectrum, the focus comes to hyper-personalized recommendations. At this stage, nuanced behavioral signals and significant historical data are ingested to drive timely and situation-specific recommendations. The change management and ethical AI use requirements at this stage are likely to be higher than at previous adoption stages. The AI is beginning to take on additional responsibilities that will have historically been nuanced and highly influenced by sellers, like churn predictions, sales funnel optimization, and buyer sentiment analysis.

One Stage 4 use case involves automated lead nurturing. Building on lead qualifying and scoring, the AI acts within rules to nurture prospects with specific content and outreach language, across mediums. This outreach is continuous and aims to progress the lead to the point of human-seller interaction. Exceed.ai, FlowUp, and Conversica offer functionality for this use case, among others.

Demand forecasting is another Stage 4 use case. Here, the AI generates a probabilistic outlook for sales volume based on factors like funnel health, engagement, historical outcomes, and the macroeconomic environment. This functionality could be leveraged in a quota setting exercise during annual planning or ongoing, real-time monitoring across the year. Salesforce, Clari, and Anaplan offer AI-based demand forecasting functionality, though there are others in the market.

## Stage 5 — Autonomous Strategy Adaption

The final stage of AI adoption involves highly trained AI having some degree of autonomy and decision-making ability. Stage 5 allows the AI to independently adjust tactics, such as customer success outreach type, topic, and frequency all based on real-time market dynamics by optimizing resource allocation and shifting focus to increase revenue. Change management and training, combined with ethical AI practices, are key at this stage to build trust and understanding of the AI tool.

Customer revenue optimization within the customer success space is an example of functionality at this stage. The AI captures inputs from CRM, email, marketing plans, and product engagement and adjusts opportunity recommendations for outreach to minimize churn risk and maximize revenue potential. This could occur with or without human intervention and approval. Clari, Gainsight, and Planhat are all heading in this direction.

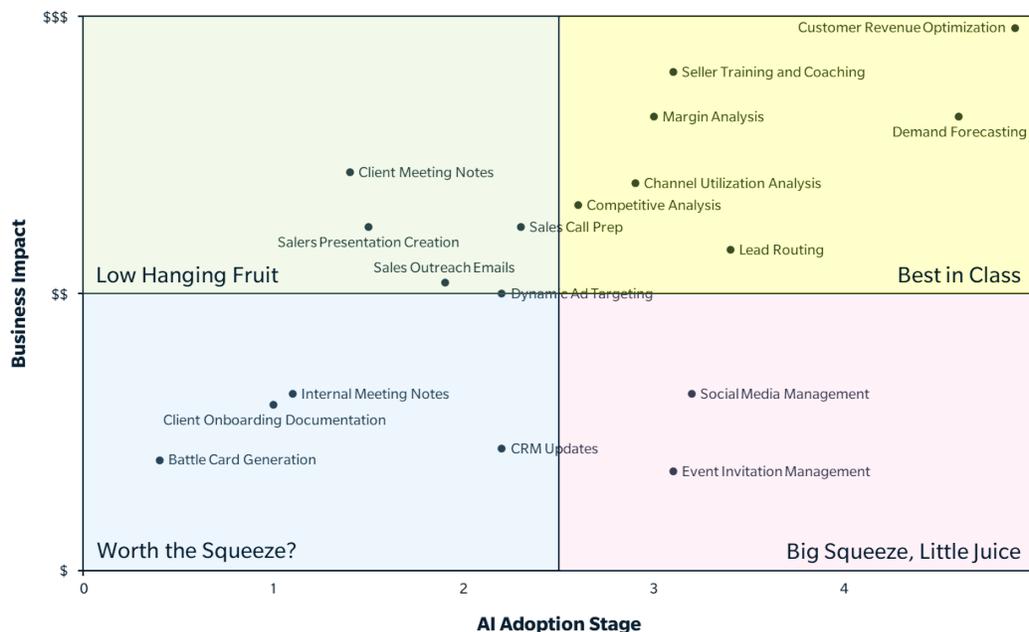
Given the early days of AI adoption, this stage of adoption lacks the wide variety of vendors and options to implement, but as the field matures and demand increases, there will be more available.

## Next Steps

When leveraging this framework, be proactive in your vision toward AI and gathering use cases. Conduct small experiments and engage with your people on how to leverage the technology.

In the Figure 3 below, we have analyzed use cases by their stage within the Adoption Spectrum and the relative business impact. By viewing use cases through this lens, experimentation will inform how your company’s AI roadmap continues to mature, starting with low-hanging fruit initially and extending to best-in-class uses. Try to avoid use cases that might not be worth the squeeze or only yield little juice.

**Figure 3: AI Use Case Matrix**



Source: SBI, Inc.