

POCKET GUIDE

Crossing the Scalability Gap



Achieving remarkable business
outcomes by scaling AI

INSIGHT
PARTNERS

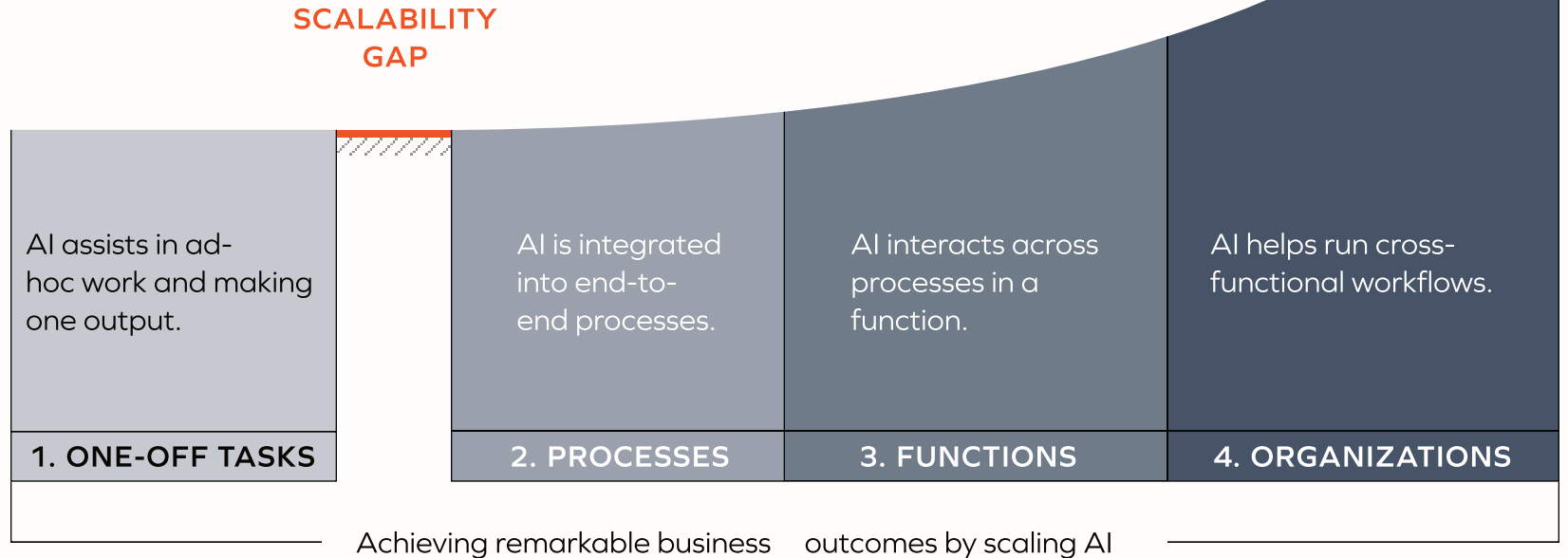
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To drive value, you must scale AI. To scale AI, you must cross the Scalability Gap.

Unfortunately, most businesses are stuck.

Their systems don't integrate, their data isn't clean, and their staff don't have the skills to work with AI agents.



Cross the gap by
piloting AI in a process
that drives your
business objectives.

Scaling AI requires more than
just buying your staff a chatbot.

You must also consider how to
adapt your systems and staff to
a new operating model.

For more examples,
resources, and AI use cases,
view this guide on the Insight
Ideas Hub.



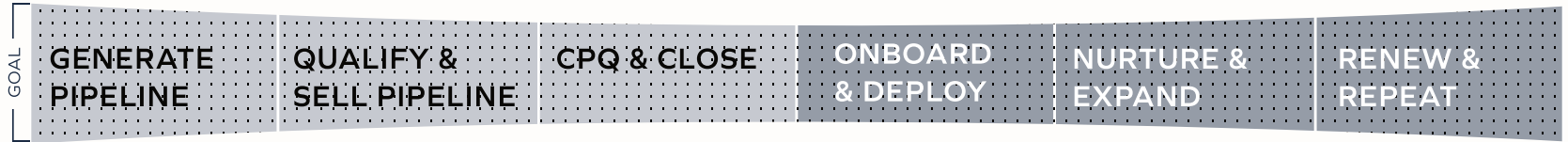
Crossing the gap

01	What's the goal?	
	OKR FRAMEWORK	<ol style="list-style-type: none"> 1. Pick an objective 2. Select a strategy 3. Set a goal
02	How can AI help?	
	AI-POWERED WORKFLOW	<ol style="list-style-type: none"> 1. List activities 2. Break down tasks 3. Map tasks to AI capabilities 4. Organize tasks into a workflow
03	Which AI?	
	AI VENDOR CRITERIA	<ol style="list-style-type: none"> 1. Pick an entry point 2. Set requirements 3. Evaluate vendors

04	Integrated how?	
	AI INTEGRATION PLAN	<ol style="list-style-type: none"> 1. Plan for change 2. Architect agency 3. Build for flexibility
05	What must change?	
	CHANGE MANAGEMENT PLAN	<ol style="list-style-type: none"> 1. Redefine staff roles and upskill workers 2. Organize around redefined roles 3. Promote AI literacy and ownership 4. Clarify policies and enforce them

01 What's the goal?

Focus your AI initiative on a key business goal and the strategies that achieve it.



	GENERATE PIPELINE	QUALIFY & SELL PIPELINE	CPQ & CLOSE	ONBOARD & DEPLOY	NURTURE & EXPAND	RENEW & REPEAT
GOALS	Penetrate Markets <ul style="list-style-type: none">Find new segmentsExploit trendsGet in-market signalsSharpen messaging	Target Qualified Buyers <ul style="list-style-type: none">Acquire & clean dataPredict conversionQualify inbound	Close Deals <ul style="list-style-type: none">Address more RFPsPersonalize proposalsOptimize pricingStreamline CPQ	Accelerate Time-to-ROI <ul style="list-style-type: none">Grow communityDeliver proactive serviceResolve more ticketsExpand knowledge basePersonalize supportScore account health	Offer Support <ul style="list-style-type: none">Grow communityDeliver proactive serviceResolve more ticketsExpand knowledge basePersonalize supportScore account health	Reduce Churn <ul style="list-style-type: none">Predict churnPersonalize renewalsIncentivize loyalty
STRATEGIES	Generate Demand <ul style="list-style-type: none">Deposition competitorsEnable partnersExpand campaignsRun referral programs	Get Response <ul style="list-style-type: none">Personalize tacticsTest, optimize, & coach	Reduce CAC <ul style="list-style-type: none">Offload to channelsEmpower self-serveReduce discounting			Reduce Cost of Post-Sales <ul style="list-style-type: none">Offer self-serve supportAutomate tasksDeprioritize bad accounts

02 How can AI help?

List the GTM activities you undertake to achieve your goals. Then, break those activities down into tasks mapped to AI capabilities.

EXAMPLE: AI IN SALES DEVELOPMENT

A

LIST ACTIVITIES

How your team achieves your goal, by input metric



INPUT METRICS & ACTIVITIES

- Acquisition and enrichment
- Research, monitoring, and scoring

B

BREAK DOWN TASKS

The work required to complete each activity



TASKS

- Analyze activity, score, triage
- Gather intelligence, hone prioritization, set an outreach plan

C

MAP TO AI ABILITIES

How AI can help your team complete the tasks



RELEVANT AI CAPABILITIES

- Aggregate and normalize data from more places
- Maintain data quality and accuracy

Example shown: AI in sales development — target qualified buyers to increase pipeline.

03 Which AI?

Pick an entry point, set requirements, and evaluate vendors. Start by considering how different AI entry points serve your required capabilities and fit your business.

GENERALIST & PLATFORM		SPECIALIST		INTEGRATED		
Chatbots	ChatGPT Gemini Claude perplexity	Jasper WRITER grammarly anyword Rytr Templafy [®] Writesonic copy.ai	Marketing	6sense Optimizely descript Deepdub.ai iIElevenLabs	Productivity	Gemini Google Workspace Microsoft 365 Copilot Notion
Platforms	OpenAI Vertex AI Microsoft Azure amazon web services	glean cohere shelf.io	Sales & CS	Gainsight [®] Salesloft. clay GONG INTERCOM	Core	ChatSpot einstein Adobe servicenow GitHub Copilot

Insight has invested in Jasper, Writer, Templafy, Shelf.io, 6sense, Optimizely, Deepdub.ai, Gainsight, Salesloft.

These are examples of solutions and not meant to be all inclusive of the landscape.

04 How should we integrate AI into our workflows?

Build a system to tie AIs together, quickly swap them out, and scale across use cases.

PLAN FOR CHANGE

Build a modular architecture that can adapt to rapid changes in technology, M&As, and experiments; build a system that enables you to align AI with your evolving needs.

ARCHITECT AGENCY

Empower AI agents to manage complex, nuanced tasks traditionally handled by humans or simpler automation systems.

BUILD FOR FLEXIBILITY

Allow AI to handle diverse tasks and data types with minimal preprocessing while maintaining robust quality assurance.

These are examples of solutions and not meant to be all inclusive of the landscape. Insight has invested in Workato, Bardeen, Dremio, Pecan, Sisense, Databricks.

INTEGRATION PLATFORMS

iPaaS & Automate



Workflow

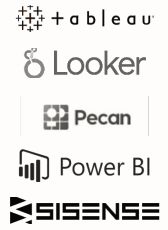


DATA INFRASTRUCTURE

Data Lake / WH

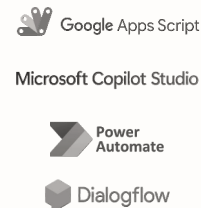


BI / Analytics



INTEGRATED & TOOLS

Productivity



Core Tools



05 What about our organization must change?

STAFF

Anticipate changes to job functions and the skills your staff will need to adopt AI.

- **Redefine roles:** Assess skill variety and autonomy, as well as task significance, volume, and quality standards.
- **Set new goals:** Reset expected outcomes for “more” and “better.”
- **Upskill:** Provide training, resources, and communication forums to help existing staff transition.

STRUCTURE

Adapt your organizational structure to optimally align redefined staff roles.

- **Consolidate and reallocate:** Move staff away from “saturated” executional work and into higher-value-add roles.
- **Flatten hierarchies:** Support greater functional scope and autonomy by reducing unnecessary managerial layers.

Redefine staff roles, organize around new roles, and promote AI ownership.

CULTURE

Foster a culture that not only adapts to but also rewards embracing AI.

- **Demystify AI:** Offer AI education, demo it in action, and create forums for end users.
- **Encourage ownership:** Involve end users in AI planning, implement responsive feedback loops, and share company AI wins.
- **Address AI-related concerns:** Tie AI efforts to company values and communicate transparently about AI’s impacts.

GOVERNANCE

Set policies for approved tools, accepted AI uses, and data handling.

About Insight Partners

Founded in 1995, Insight Partners is a global software investor partnering with high-growth technology, software, and Internet startup and ScaleUp companies that are driving transformative change in their industries.

About Insight Onsite

Having supported over 800 software investments, Insight Onsite is a comprehensive growth engine with over 140 operating experts dedicated to founders and software leaders' success.

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Notes

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