

Automate Intelligently:

# AI in the SE Workflow



*"AI will completely transform Solutions Engineering!"*

*"Our competitors are already using AI for everything!"*

*"If we don't adopt AI immediately we'll be left behind!"*

Sound familiar?

The breathless headlines and vendor pitches make it seem like artificial intelligence is already handling every aspect of the PreSales process — from discovery calls to demos to technical recommendations.

**The reality is far more nuanced.**

The teams seeing genuine results from AI aren't the ones attempting wholesale transformation. They're the ones precisely applying AI to specific workflows where it demonstrably outperforms humans, while doubling down on the irreplaceable human elements that actually close deals.

This playbook distills those hard-won insights into actionable strategies. No marketing fluff. No vendor propaganda. Just practical guidance on where AI is actually delivering ROI today, where human expertise remains essential, and how to build an implementation roadmap that drives results without disrupting what already works.

## Separating the AI Hype from Reality

There's a significant gap between vendor promises and on-the-ground reality when it comes to AI. Let's clear up the most common misconceptions:

**Misconception:** AI can fully automate the Solutions Engineering role.

**Reality:** AI excels at specific, well-defined tasks but struggles with the nuanced, consultative elements that close deals.

**Misconception:** Implementing AI requires complete workflow transformation.

**Reality:** The most successful implementations augment existing workflows rather than replacing them entirely.

**Misconception:** AI can effectively replace human discovery conversations.

**Reality:** While AI can generate questions, it cannot detect the subtle emotional cues that reveal unspoken concerns and objections.

**Misconception:** General AI tools are sufficient for Solutions Engineering.

**Reality:** Generic AI models lack the specialized knowledge and context needed for technical solutions work without significant customizations.

## Where AI is Delivering Real Value Today

Not all AI use cases are created equal. Here's where Solutions teams are seeing tangible ROI:

### Accelerating Documentation & RFP Responses

*Transform your highest-volume, lowest-creativity tasks*

Documentation and RFPs consume staggering amounts of SE time with minimal strategic impact. AI excels at automating these first drafts:

- **RFP response generation:** Convert requirements into tailored first-draft responses
- **Technical documentation:** Create foundational product descriptions that need minimal editing
- **Security questionnaires:** Auto-populate standard responses from knowledge base

## AI Prompt Template: RFP Response

Generate a response to this RFP question: [PASTE QUESTION]

Include these key points:

- [PRODUCT CAPABILITY 1]
- [PRODUCT CAPABILITY 2]
- [COMPETITIVE ADVANTAGE]

Style: Professional, concise, benefit-focused

Length: Approximately 200 words

*"We've found a lot of value in RFP responses and document generation using AI."*



**Brian McHugh**

VP, Technical Solutions at PubMatic

## Content Synthesis & Communication

### *Distill signals from noise*

The modern PreSales workflow drowns in information. AI tools excel at processing and summarizing large volumes of content:

### Meeting Intelligence

- Extract key insights from discovery calls
- Identify and categorize customer requirements
- Flag potential objections for follow-up

## Proposal & Communication Efficiency

- Create personalized follow-up emails highlighting key discussion points
- Generate executive summaries from technical deep dives
- Craft compelling one-pagers tailored to specific stakeholders

## Tools Making an Impact:

- Gong + AI: Conversation intelligence with automated insight extraction
- NotebookLM: Research organization and synthesis
- Perplexity: Rapid knowledge gathering and summarization

*"Research and summarization; email and proposal drafting — this is where AI shines."*



**Stephen Morse**  
CEO and Founder, SELI

## Knowledge Augmentation

### *Extend your team's expertise*

Even the most seasoned SE can't memorize every product detail, competitive differentiator, or technical specification.

## AI Knowledge Assistant Applications

- Quick access to complex product specifications
- Real-time competitive intelligence during calls
- Summarization of technical documentation

### Implementation Spotlight: Knowledge Base Integration

The most effective implementations connect AI directly to your sources of truth:

- Connect AI to your knowledge base, documentation, and competitive intel
- Create specialized prompts for different information needs
- Maintain continuous feedback loops to improve accuracy

## Where Human Expertise Remains Irreplaceable

Despite rapid AI advancement, certain aspects of the Solutions Engineering role remain fundamentally human. These are the areas where top performers should continue to invest their time and energy.

### Discovery & Qualification: The Art of Reading Between the Lines

#### AI Limitation:

Cannot detect subtle emotional cues or unspoken concerns

#### Human Advantage:

Seasoned SEs can sense hesitation, identify unmentioned stakeholders, and adapt in real time to build trust.

#### Industry Insight:

Discovery calls remain the most human dependent part of the PreSales process. The most valuable insights often come from noticing when a prospect pauses, shifts uncomfortably, or exchanges glances with colleagues — nuances that AI cannot perceive or interpret correctly.

*"There's so much nuance in how a customer answers discovery questions. It's not repeatable or replaceable."*



**Brian McHugh**

VP, Technical Solutions at PubMatic

## Demo Delivery & Technical Storytelling

*"Demo delivery is the core of PreSales — it's where trust and technical credibility are built."*



**Stephen Morse**  
CEO and Founder, SELI

### AI Limitation:

Cannot establish authentic rapport or emotional connection

### Human Advantage:

Exceptional SEs weave technical capabilities into compelling narratives that resonate with specific audience needs.

### The Trust Equation in Solutions Engineering:

- Credibility (established through technical knowledge)
- Reliability (demonstrated through preparation and responsiveness)
- Intimacy (created through genuine human connection)
- Self-orientation (focusing on customer success over your own agenda)

## Strategic Advisory & Complex Problem-Solving

### AI Limitation:

Lacks contextual judgment and industry-specific intuition

### Human Advantage:

Experienced SEs integrate technical knowledge with business acumen to solve complex, multi-dimensional problems.

Best for AI	Best for Humans
✓ High-volume, repetitive tasks	✓ Nuanced discovery conversations
✓ First-draft documentation	✓ Reading emotional cues
✓ Research compilation	✓ Building rapport and trust
✓ Content personalization	✓ Complex technical storytelling
✓ Meeting summarization	✓ Critical decision-making

# Framework for Thoughtful AI Adoption

The fundamental question isn't whether to adopt AI, but where and how to implement it effectively.

## Tool Selection Guide

Task Category	Recommended Tool Types	Popular Options
Documentation	LLM with context window	Claude, GPT-4, Gemini
Research	RAG-enhanced search	Perplexity, NotebookLM
Meeting Intelligence	Conversation analysis	Gong, Chorus
Email & Communication	Writing assistants	Claude, GPT-4
Knowledge Management	Vector databases	Pinecone, Weaviate



## Implementation Strategy: Start Small, Win Big

Begin your AI implementation with focused use cases that deliver immediate value.

*"Identify the activities that are most resource-heavy. Start there."*



**Brian McHugh**

VP, Technical Solutions at PubMatic

### First 30 Days:

#### Quick Wins

- Automate one repetitive documentation task
- Create templates for common email responses
- Test AI-assisted meeting summaries

### 60-90 Days:

#### Expand Application

- Develop customer prompts for your product/industry
- Integrate AI tools with existing workflows
- Measure time savings and quality improvements

### 90+ Days:

#### Strategic Integration

- Connect AI to internal knowledge bases
- Develop team-wide best practices
- Create governance frameworks

## Change Management

*"You need to embrace the technology — we're figuring it out together."*



**Stephen Morse**  
CEO and Founder, SELI

- Training and enablement for SE teams
- Addressing resistance and concerns about job security
- Measuring success: KPIs for AI-assisted Solutions Engineering

## The Future of AI in Solutions Engineering

**While today's implementations focus on efficiency, tomorrow's will transform how solutions are delivered.**

### Emerging Trends to Watch

#### Automated Demo Environments

- AI-generated, personalized demo instances
- Self-guided tours for early-stage prospects
- Intelligent adaptation based on user behavior

*"We're exploring demo automation for early-stage, non-qualified opps to place team resources where SEs can have the greatest impact."*



**Brian McHugh**  
VP, Technical Solutions at PubMatic

#### AI-Enhanced Discovery

- Real-time recommendation engines
- Automated follow-up question generation
- Sentiment analysis during customer conversations

#### Predictive Solution Design

- AI-suggested configurations based on similar customers
- Automated technical fit assessment
- Value calculation based on customer-specific valuables

## Preparing for What's Next: The AI-Augmented SE

#### Skills to Develop:

- **Prompt engineering:** The ability to structure requests to AI systems that produce accurate, useful outputs.
- **AI output verification:** Developing a systematic approach to validating AI-generated content for accuracy, completeness, and alignment with brand standards.
- **Integration of AI insights into storytelling:** The ability to take raw information generated by AI and weave it into compelling narratives that resonate with prospects.

#### Organizational Readiness:

- **Ethical guidelines for AI use:** Established principles for responsible AI implementation that align with company values and customer expectations.
- **Clear humans-in-the-loop processes:** Defined workflows that specify exactly where and how human oversight integrates with AI automation.
- **Knowledge management infrastructure:** Systems that capture, organize, and make accessible the collective expertise of your Solutions team.

*"We're still in the AI nascence — expect major improvements, but stay grounded in what works today."*



**Stephen Morse**  
CEO and Founder, SELI

# Your Path Forward: Pragmatic AI Adoption

Successful AI integration isn't about chasing every shiny new tool. It's about thoughtfully applying technology to:

- ✓ Reduce administrative burden
- ✓ Amplify human expertise
- ✓ Create more time for high-value customer interactions



Ready to implement AI effectively in your  
Solutions practice? Let us help.

[Schedule a demo](#)