



The AI-Native Sales Organization Playbook

Leveraging AI Tools for Revenue Growth

43%

of companies use
AI to improve sales
forecasts.

7%

use AI for pricing
strategies.

4%

use AI for competitive
intelligence.

Introduction

AI is rapidly changing how businesses operate, but the real challenge is figuring out how to use it to grow revenue. You’re likely feeling the pressure to reduce costs, increase productivity, and stay ahead of the competition. That’s where this playbook comes in.

What you'll get

This ebook gives you a clear, practical path to using AI in your revenue-generating workflows. It’s based on TSIA’s in-depth Research Journey and designed to help you:

-  Identify key challenges in revenue operations.
-  Understand the risks of standing still.
-  Find practical ways to implement AI across your sales processes.

By the end, you’ll have a better grasp of how AI can improve your sales performance—and what steps you can take today toward becoming an AI-native sales organization.

TSIA Research Journey “Explainer Page”

TSIA Research Journeys is our initiative to solve today's top problems plaguing the tech industry. We launch discovery research, build practical theories, and deliver industry-validated insights designed to empower every tech company.

How do TSIA Research Journeys work?



Define the Problem

By clearly identifying the business challenge, we can start tackling it.



Launch Discovery

With polls, interviews, and more, here's where we dig deep into the facts and contributing factors.



Develop the Theory

With data in hand, our researchers and analysts can start building frameworks.



Guide the Industry

Correlations to financial results lead to conclusions. We're ready to present our findings!



AI. For Technology Services.



What it is

[TSIA Intelligence](#) is TSIA's new AI-powered assistant. It delivers instant, actionable insights from TSIA's exclusive, industry-validated research. Built only for Technology Services, it helps you make smarter decisions.



Why it matters

Trusted Answers, Not Generic AI: Based on TSIA's proprietary data—not the open web.

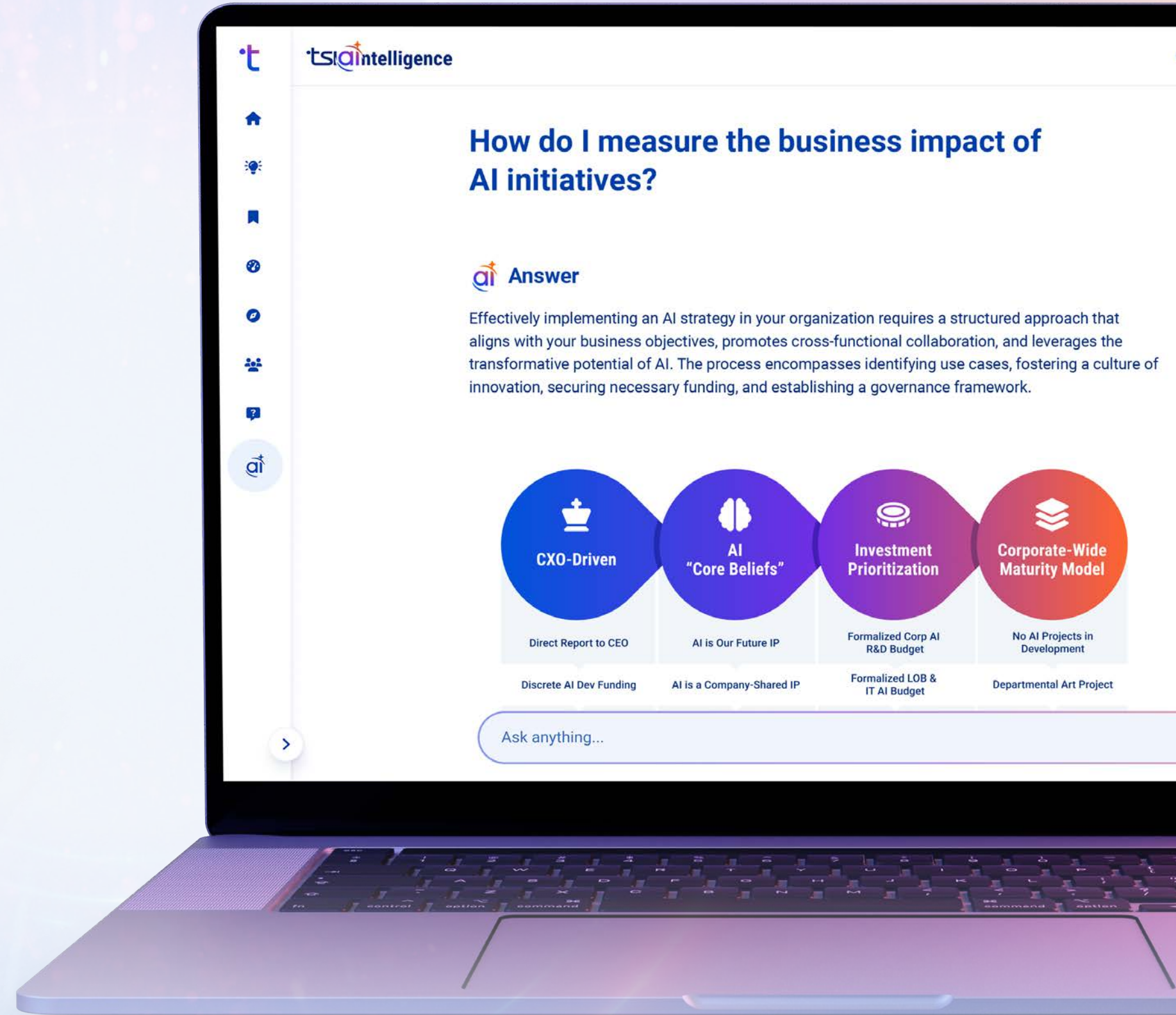
Instant Value: Summarizes reports, answers questions, and visualizes data in seconds.

Built for Tech Services: Specialized insights tailored to your industry challenges.

**[Experience TSIA Intelligence today—
for free—in the TSIA Portal.](#)**

Generic AI gives general answers. TSIA's AI gives the right ones.

Ask a question ➤





The End of Services or the *ERA* of Services?

AI isn't eliminating services-it's launching the most service-intensive era tech has ever seen

Why? The last mile of AI adoption—vertical requirements, messy data, legacy systems, security—demands a powerful services layer.

The three truths

1 Serviceless AI is a myth

2 Pricing must shift
to value and outcomes

3 Incumbents have an advantage
over startups if they retool existing services

Download the
AI Economics Declaration

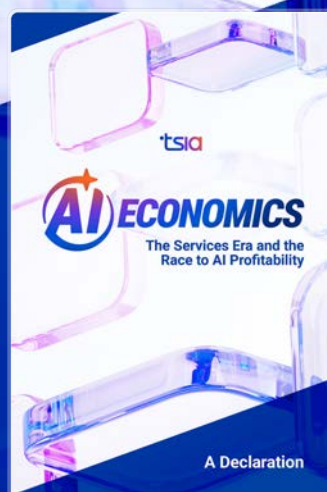


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Define the Problem

By clearly identifying the business challenge, we can start tackling it.

The Revenue Growth Problem You're Facing: Expectations To Do More With Less

Today's tech companies are being squeezed from both sides:



Budgets are shrinking and so are sales teams—meanwhile, expectations remain the same or higher. That's a tough ask.

Whether you're in sales, customer success, or a revenue leadership role, you're likely feeling the pressure to hit your numbers without the resources you used to rely on.

Why AI Is No Longer Optional

If you're not leveraging AI, you're already falling behind.

Take this scenario: Two companies respond to an RFP. One drafts a response manually over three days. The other uses AI to generate a high-quality draft in minutes. The faster, more efficient team wins the business. That's the reality AI brings to revenue teams.

Without AI, you risk:



Slower response times.



Higher operating costs.



Reduced customer satisfaction.



Missed growth opportunities.

The message is clear...

IF YOU DON'T ADAPT, YOU RISK BECOMING IRRELEVANT.



What This Research Journey Uncovered

To help you solve this challenge, [TSIA's completed Research Journey](#) explored how top-performing companies are using AI in real revenue workflows—not just theory.

TSIA studied:

1

The most common AI use cases in sales and revenue operations (via surveys and polls).

2

Real-world case studies of sales teams already using AI tools.

3

Firsthand insights from sales leaders and reps on what's working.

From there, we mapped out the habits, workflows, and tactics that define a successful AI-enabled sales rep.

Launch Discovery

Here's where we dig deep into the facts and contributing factors with polls, interviews, and more.

How Are Sales Reps Using AI?

You’ve heard the hype, but what’s happening in the field? [TSIA’s Research Journey](#) explored [real-world use cases](#) to understand how sales reps are actively using AI to drive results. Here’s what we found.

The Discovery Phase: What We Explored

We kicked off this phase with:

A poll to capture current AI usage in sales workflows.

Interviews with AI-driven sales organizations.

A look at emerging tools and practical use cases.

The goal? To separate theory from action and uncover what’s working.

Why GenAI Is Changing the Game

Unlike earlier machine learning models, GenAI doesn’t just analyze data—it transforms workflows and can:

Identify competitor activity in real-time.

Distill insights into actionable resources for sales (like battle cards).

Empower reps to respond faster and smarter in deals.

For sales teams, this means no more walking into meetings unprepared. Your reps get what they need, when they need it—no extra work required.

Competitive Intelligence at AI Speed

One standout [example](#) came from Klue, an AI platform helping sales teams surface and act on competitive insights faster than ever.

Klue’s AI gathers internal and external data to:

A poll to capture current AI usage in sales workflows.

Interviews with AI-driven sales organizations.

A look at emerging tools and practical use cases.

With generative AI, data isn’t just analyzed—it’s curated, packaged, and pushed to reps in a way they can use.

Adoption Tip: Make It Easy To Win

AI adoption won’t happen if it slows reps down. The key?

Don’t ask for change.

Deliver immediate value.

Feed answers into your rep’s existing tools. Help them win more deals, faster. Once they see the results, they’ll keep coming back.

Develop the Theory

With data in hand, our researchers and analysts can start building frameworks.

Where AI Adoption Lags—and Why It Matters

Your Sales Reps Aren't Using the Tools That Could Help Most

[TSIA's polling revealed a surprising gap](#): while AI tools like predictive forecasting are widely used, others—like AI-driven pricing models and competitive intelligence platforms—are barely touched.

Here's what we found:



Those are missed opportunities; these underused tools have proven potential to boost revenue and margins, but many companies are still holding back.

What's Holding Sales Teams Back?

Despite the promise, adoption remains slow in key areas. **Why?**

- 

Pricing Feels Too Risky
Pricing involves nuance—like bulk discounts, seasonality, and human behavior. Many companies hesitate to trust AI with decisions that could impact margins or customer trust. A quick poll highlighted that few respondents are using AI for things like pricing strategies (7% of respondents) and competitive intelligence (4% of respondents). Despite their high potential, these models are barely used.
- 

There's a Fear of Losing Control
For many leaders, the concern isn't about AI's ability—it's about handing over strategic decisions to an algorithm. Pricing and competitive strategy are high-stakes areas traditionally shaped by human expertise. Letting go is hard.

What Leading Companies Are Doing Differently

While many hesitate, some companies are moving forward—and seeing results.

Case Study

Dell Technologies

Dell developed AIDO, an AI-powered tool that optimizes warranty pricing after the sale. The result?

- 1 Higher revenue productivity.
- 2 Increased margin gains.
- 3 Scalable operations worldwide.

Case Study

Case Study: Klue

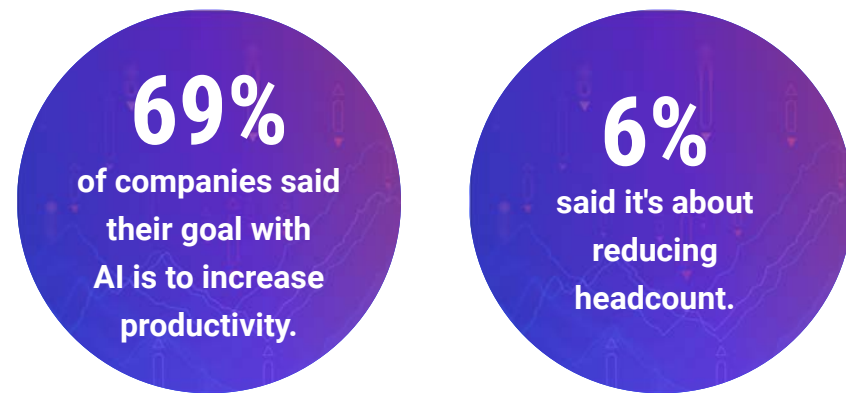
Klue uses AI to turn massive amounts of competitive data into battle-ready insights for sellers. The outcome?

- 1 Faster decision-making.
- 2 Increased win rates.
- 3 Smarter, data-driven sales motions.

AI's Role in Workforce Shifts

AI Is Changing More Than Sales Tools—It's Changing Teams.

[TSIA's additional polling uncovered a disconnect:](#)



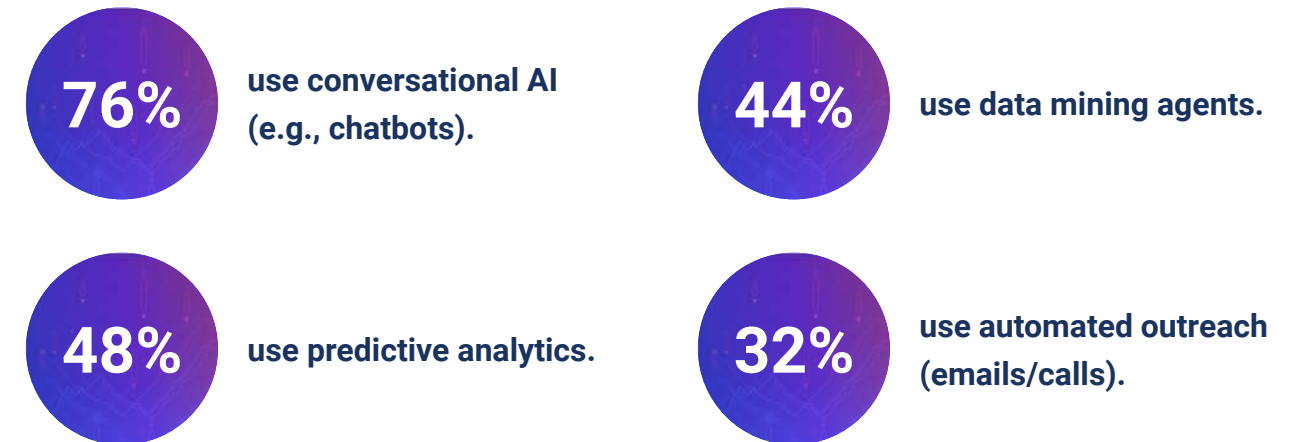
But layoffs at major companies suggest otherwise. AI is reshaping teams—automating roles, accelerating workflows, and forcing companies to rethink how people and technology work together.

AI = Retention + Revenue Growth

Companies using AI saw a 14-point boost in Net Revenue Retention (NRR) compared to those that didn't. That's not just a performance gain—it's a competitive edge.

Which AI Tools Are Getting Traction?

Most-used [AI agents](#) in sales and business development:



Industry Spotlight: Hardware Companies

Hardware orgs lead in automation, relying more heavily on AI to support service dispatches, remote support, and follow-ups—often in real time.

It's Not Just About Tools—It's About Trust

Your team's hesitation may not stem from technology gaps. It might be about letting go of control, trusting new systems, and adapting to a new rhythm of decision-making.

AI is here. The question is: *will your sales strategy evolve with it?*

Guide the Industry

Correlations to financial results lead to conclusions.
We're ready to present our findings!

Your Guide to Leading in the AI-Native Sales Era

Over six months, TSIA explored how real sales organizations are integrating AI to improve performance. The result? A practical, research-backed playbook for sales leaders like you—designed to help you adapt, compete, and grow in a new era of selling.

What TSIA Learned

The research is clear: AI isn't just a tool. It's a strategy. [Key insights from TSIA's Research Journey](#) show:

- 1 Efficiency is the top driver behind AI adoption, not headcount reduction.
- 2 AI improves customer retention, helping companies grow existing relationships.
- 3 Adoption is still early, meaning the competitive advantage is real for those who act now.
- 4 AI is reshaping the workforce, even as companies position it as a productivity tool.

Why Traditional Sales Models Are Breaking Down

You're facing shrinking bandwidth, rising targets, and increasing complexity. Meanwhile, reps spend too much time on administrative work and not enough time with customers. This disconnect makes room for AI to step in—not to replace your team, but to empower them.

The AI-Native Sales Organization Playbook

You don't need to be an AI expert to lead your team through this transformation. You just need a clear set of principles—and a playbook that's built on fundamental research and proven results. This section provides both.

Here's how to think—and operate—like an AI-native sales organization.

1. Lead With Data, Not Gut Instinct

AI gives you something sales have long needed: clarity.

- ☐ Use AI-generated insights to guide territory planning, forecast accuracy, and rep performance.
- ☐ Trust the patterns, not just your experience; data often reveals what instincts miss.
- ☐ Make strategic decisions based on trends in customer behavior, win/loss analysis, and deal velocity.

2. Prioritize the Right AI Use Cases

Not every tool is right for your team. Start with use cases that offer fast time-to-value:

- ☐ **Conversational AI:** Free up reps from repetitive outreach.
- ☐ **Predictive lead scoring:** Focus attention where it's most likely to convert.
- ☐ **AI-driven battle cards:** Give reps real-time competitive insight during live calls.
- ☐ **Dynamic pricing models:** Deliver smarter offers based on market and buyer signals.

3. Enable, Don't Just Implement

AI won't work if no one uses it. The best sales leaders invest in adoption, not just tools.

- ☐ Provide contextual training—teach reps how AI makes them better, not busier.
- ☐ Integrate AI into daily workflows so it feels like help, not a new process.
- ☐ Share early wins to build confidence and momentum.

4. Champion Data Readiness

No AI system can function well with broken or siloed data.

- ☐ Audit your CRM and key systems for data quality.
- ☐ Align with marketing and product teams to unify sources.
- ☐ Establish a single source of truth so AI recommendations are trustworthy.

5. Automate To Amplify, Not Replace

AI should make reps more impactful, not obsolete. Use automation to remove barriers, not relationships.

- ☐ Automate lead follow-up, meeting prep, and call summaries.
- ☐ Give reps more time to sell by reducing administrative tasks.
- ☐ Use AI as a coach—suggesting next steps, not taking them.

6. Measure, Iterate, and Scale

You can't manage what you don't measure.

- ☐ Set KPIs for every AI initiative (e.g., time-to-close, win rate, NRR).
- ☐ Review performance regularly and make adjustments.
- ☐ When you see what works, scale it across teams, regions, or verticals.

You're Not Just Managing Sales—You're Leading the Future

Being an AI-native sales organization means more than adopting new tech. It means rethinking how your team works, how value is created, and what success looks like in a world where AI is part of every workflow.

This playbook gives you the foundation. Now, it's up to you to lead the change.

TSIA's Complete Ecosystem

Benchmarking

Proprietary, data-driven comparisons against peer companies.

-  **Performance Optimizer (self-serve or researcher-led):** Measures maturity, identifies gaps, and compares against industry averages.
-  **DataViews & Key Metrics:** Bite-sized benchmarks (e.g., renewal rates, adoption ratios) available in the TSIA Portal.

Expert Inquiry

An Expert Inquiry is a direct engagement with a TSIA Research Executive to answer a specific business question or validate a strategy. Inquiries are addressed via a curated email response or a 30-minute call, depending on the complexity of the issue.



TSIA Intelligence (AI)

The first AI built exclusively for technology services. Provides trusted answers in seconds, complementing the expertise of human researchers.



Advisory Services

Advisory Blocks:
1–4 hour hyper-focused, virtual sessions solving a specific challenge.

Interactive Strategy Reviews (ISRs):
Researcher reviews strategy docs and hosts a 2-hour interactive session with recommendations.

Workshops:
Half-to full-day engagements for team enablement and transformation planning.

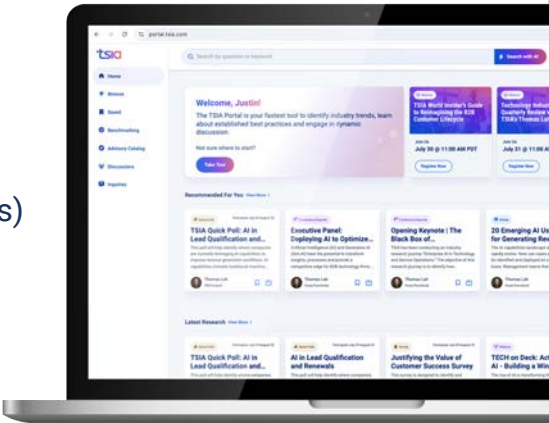
Speaking Engagements:
Keynotes, executive briefings, or panels delivered by TSIA experts.



TSIA Portal: Research & Insights

A rich library of proprietary research and tools.

- Formats include:**
- Research Reports (deep analysis)
 - State of the Industry Reports (annual, free)
 - Framework Papers (visual best-practice models)
 - Articles (thought leadership)
 - DataViews (benchmark stats, always paid)
 - Webinars & Podcasts (free, expert-led)
 - Industry Stories (real-world applications)



Community & Peer Learning

 **Advisory Boards:**
Peer councils by Research Area.

 **TSIA World Conferences:**
Keynotes, breakouts, and networking with thousands of executives.

 **STAR Awards:**
Recognition of member success stories.

TSIA BOARD SUMMIT

Executive-Hosted Forum:
An invite-only experience for TSIA Advisory Board executives to think deeply, connect meaningfully, and act decisively on the future of technology services.

Role of TSIA Researchers & Experts

Content Creators:
Develop all research, frameworks, and models.

Inquiry Responders:
Deliver fast, curated answers and benchmark validation.

Advisory Partners:
Lead Advisory Blocks, ISRs, workshops, and speaking engagements.

Conference Leaders:
Present keynotes, facilitate boards, and run panels.

Community Anchors:
Contribute to boards and discussions, shaping peer learning.

AI + Human Synergy (TSIA Intelligence):
Provides instant answers, while researchers add context, nuance, and strategic guidance

Contact Us

Free

Explore TSIA's ecosystem with limited access to research and AI tools—ideal for getting familiar before you commit.

-  **Limited TSIA Intelligence**
- ✓ **3 AI Inquiries:** Specialized AI Q&A for technology services.
 - ✓ **3 AI Content Assistant Uses:** Instant summaries and deep dives into reports, videos, and more.
 - ✓ **Limited Access** to TSIA research
 - ✓ **Performance Optimizer Benchmarks** free version

Best for you

Individual

Get full, self-serve access to all research areas, TSIA Intelligence, and benchmarking—built for SMB leaders and solo professionals ready to level up.

 Single User

-  **Unlimited TSIA Intelligence**
- ✓ **AI Inquiry:** Specialized AI Q&A for technology services.
 - ✓ **AI Content Assistant:** Instant summaries and deep dives into reports, videos, and more.
 - ✓ **Access to all TSIA Research Areas Content** including reports, on-demand content, webinars, data, and personalized study results
 - ✓ **TSIA World Industry Conference** discounts

Best for your company

Enterprise

Access organization-wide research, expert advice, and advanced benchmarking to drive large-scale service transformation.

 Unlimited Users

-  **Unlimited TSIA Intelligence**
- ✓ **AI Inquiry:** Specialized AI Q&A for technology services.
 - ✓ **AI Content Assistant:** Instant summaries and deep dives into reports, videos, and more.
 - ✓ **Everything in Individual plus:**
 - ✓ **Expert Inquiry:** Personalized 1-on-1 guidance calls with TSIA researchers
 - ✓ **Full Expert-led Benchmarking** with Performance Optimizer
 - ✓ **Advisory Services**
 - ✓ **Annual Industry Briefings**
 - ✓ **Speaking Engagements**
 - ✓ **Interactive Strategy Reviews**
 - ✓ **TSIA World Industry Conference** vouchers
 - ✓ **TSIA Board Summit Executive Event** invites
 - ✓ **Be recognized among peers and customers** with STAR Awards
 - ✓ **Member Success Planning**



Contact Us

Questions? Our team is here to guide you toward the right TSIA solution for your needs.

Get in touch



Make smart decisions.™

TSIA (Technology & Services Industry Association) is dedicated to helping technology and services organizations large and small grow and advance in the technology industry. Find out how you can achieve success, too.

Have questions? [Let us know.](#)

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