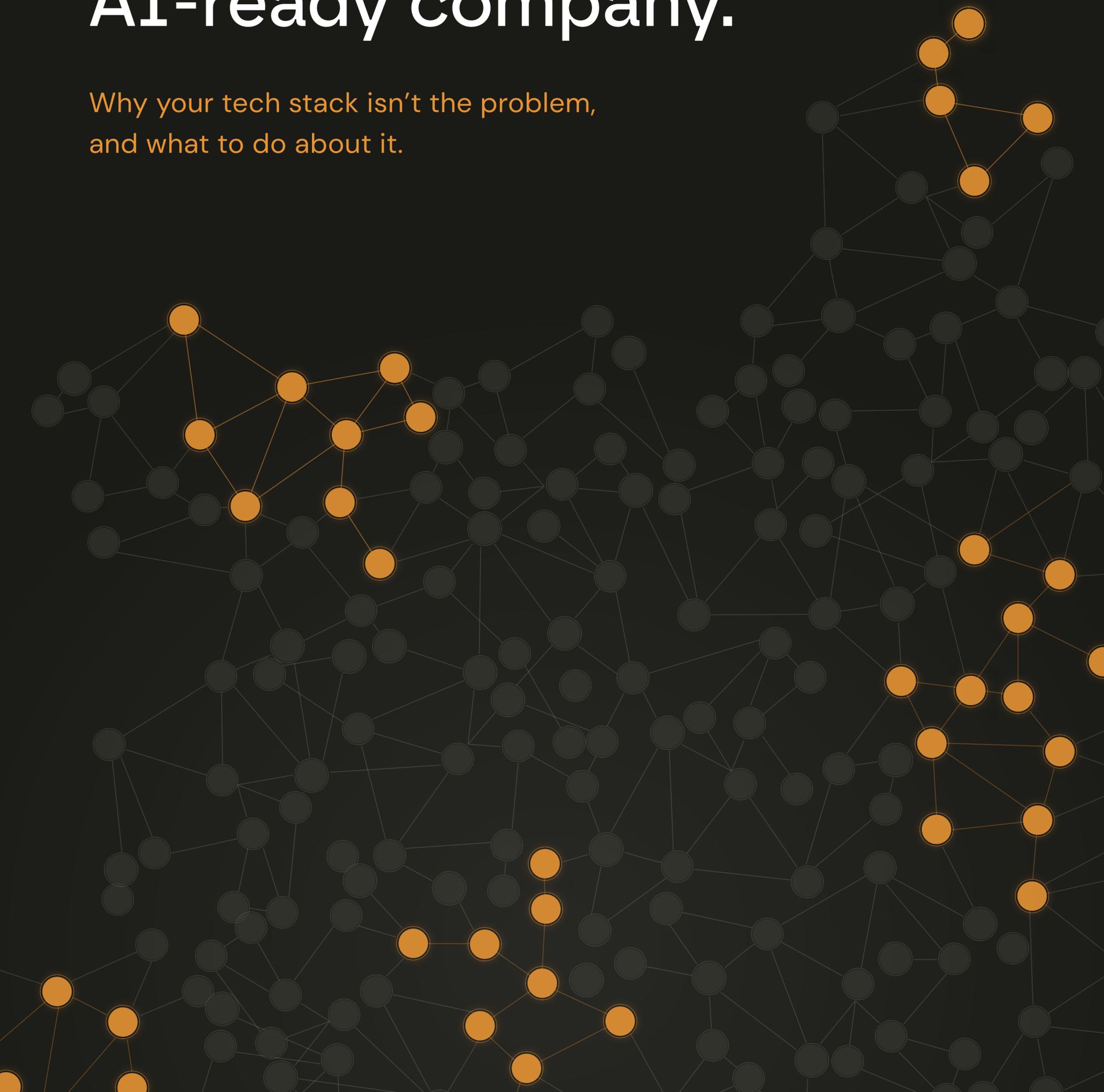[WHITEPAPER]

Stop buying tools. Start building an AI-ready company.

Why your tech stack isn't the problem, and what to do about it.

Foreword.

We started Dragonfly because we lived the problem.

As operators in fast-scaling companies, we watched teams waste months and budgets evaluating tools through gut feel, making software decisions in spreadsheets that were outdated the moment they were shared, and adopting AI at the surface without the strategy, structure, or skills to turn it into impact.

The tools were out there. The clarity wasn't.

Today, employees in over 90% of companies are using AI tools for work[1]. But using AI and being AI-ready are very different things. Most companies have bought the tools. They haven't changed the process.

This paper lays out our answer: the Dragonfly AI-Readiness Framework. It evaluates businesses not by how many tools they own, but by how much human effort is still required to move work from one step to the next.

We've applied it across hundreds of tech stacks and found the same pattern: most scaling companies are stuck between levels two and three, digitised and automated on the surface, but nowhere near ready to unlock what AI can actually do for them.

That gap is what Dragonfly exists to close.

SEAN KING AND SVEN SABAS
CO-FOUNDERS, DRAGONFLY

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1. Challapally, A., Pease, C., Raskar, R. and Chari, P. (2025) *The GenAI divide: State of AI in business 2025*. MIT NANDA.

Everyone is talking about AI.
Most aren't ready for it.

Everyone is talking about AI, copilots, agents, autonomous workflows. But when we sit down with companies, founders, CTOs, ops leaders, the reality looks nothing like the LinkedIn posts we read every day. Most aren't blocked by a lack of tools.

They're blocked by the way their business is built. At Dragonfly, we've spent the last year mapping hundreds of tech stacks across sales, support, engineering, HR, finance, marketing and beyond. What we've learned is clear:

> " *You don't become AI-ready by buying AI tools. You become AI-ready by changing how work flows through your company.*

Put differently: AI-readiness is a stance, not a purchase. What is your organisation's posture towards this shift? What have you actually put in place, or changed, to enable this transition?

If the answer is "we bought some new tools but nothing else is fundamentally different," you have the wrong stance.

The tools will underperform, the investment will stall, and six months from now you'll be wondering why the AI revolution passed you by.

That's why we built the Dragonfly AI-Readiness Framework: a new way to measure where your business actually is today, and what it will really take to move forward.

The Dragonfly AI-Readiness framework.

The framework measures readiness across three pillars, not just the tools you own, but the strategy behind them and the people using them.


[THE THREE CORE PILLARS]

Technology
Are you using the right tools for each stage of your core processes, or are you running yesterday's stack and expecting tomorrow's results?

Strategy
Do you have clear direction on what AI should be doing for your business? Do you have policies for data use, risk mitigation, and fair use, or are your teams experimenting in the dark?

People
Are your teams equipped to work alongside AI? Are you building literacy, sharing knowledge, and creating a culture that actually adopts what you're investing in?
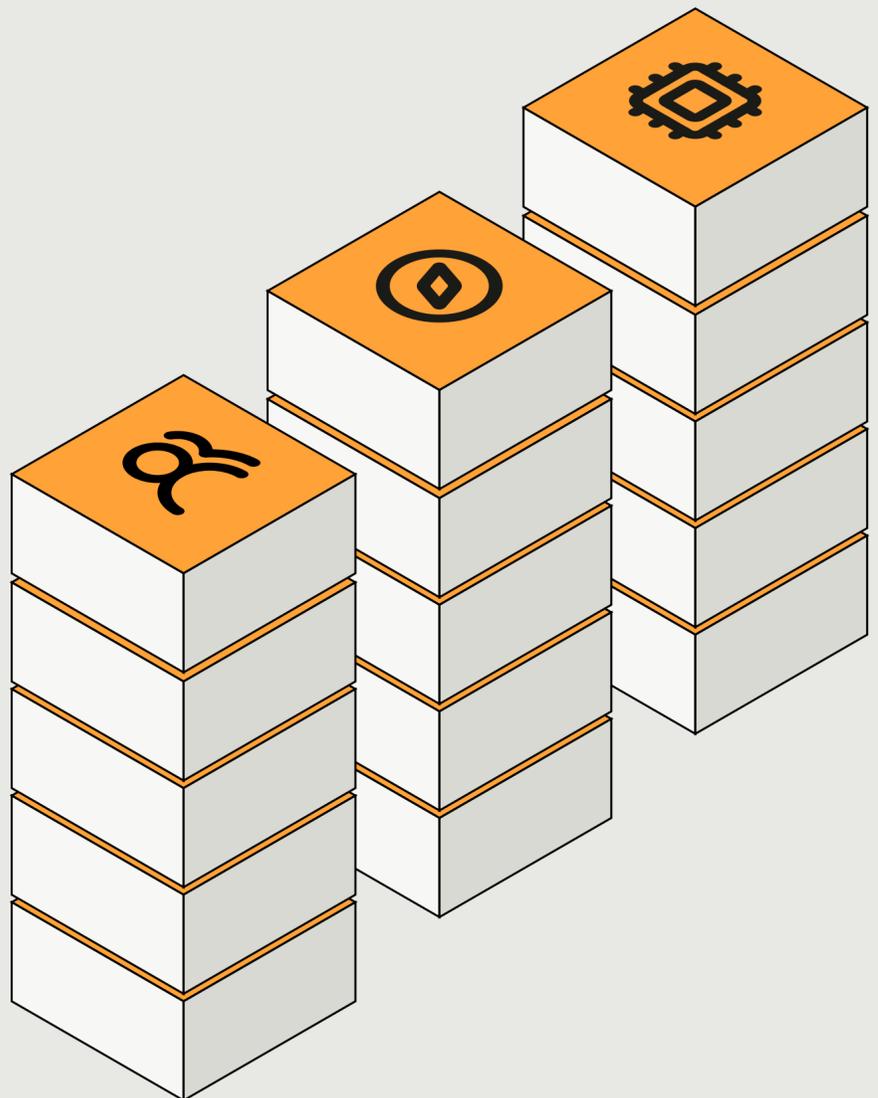
Today we're launching the first pillar of that framework: a technology benchmark that scores your tooling stack against the best in the market, department by department.

# Your software is not a set of tools. It's how your business runs.

Before we get into the framework, we need to reframe how you think about your tech stack.

Across every team in every company, the same basic pattern exists. A customer is found. A task is created. Someone takes action. A result is delivered.

We call that pattern a **process,** the fundamental sequence of steps required to turn intent into outcome. Your software stack is simply how you choose to implement that process.

This distinction matters because most companies treat software as a utility, a tool you buy to do a job. But software isn't a utility. It's the implementation of a process. And if you don't understand the process underneath, you can't evaluate whether the tools on top are helping or hiding the problem.
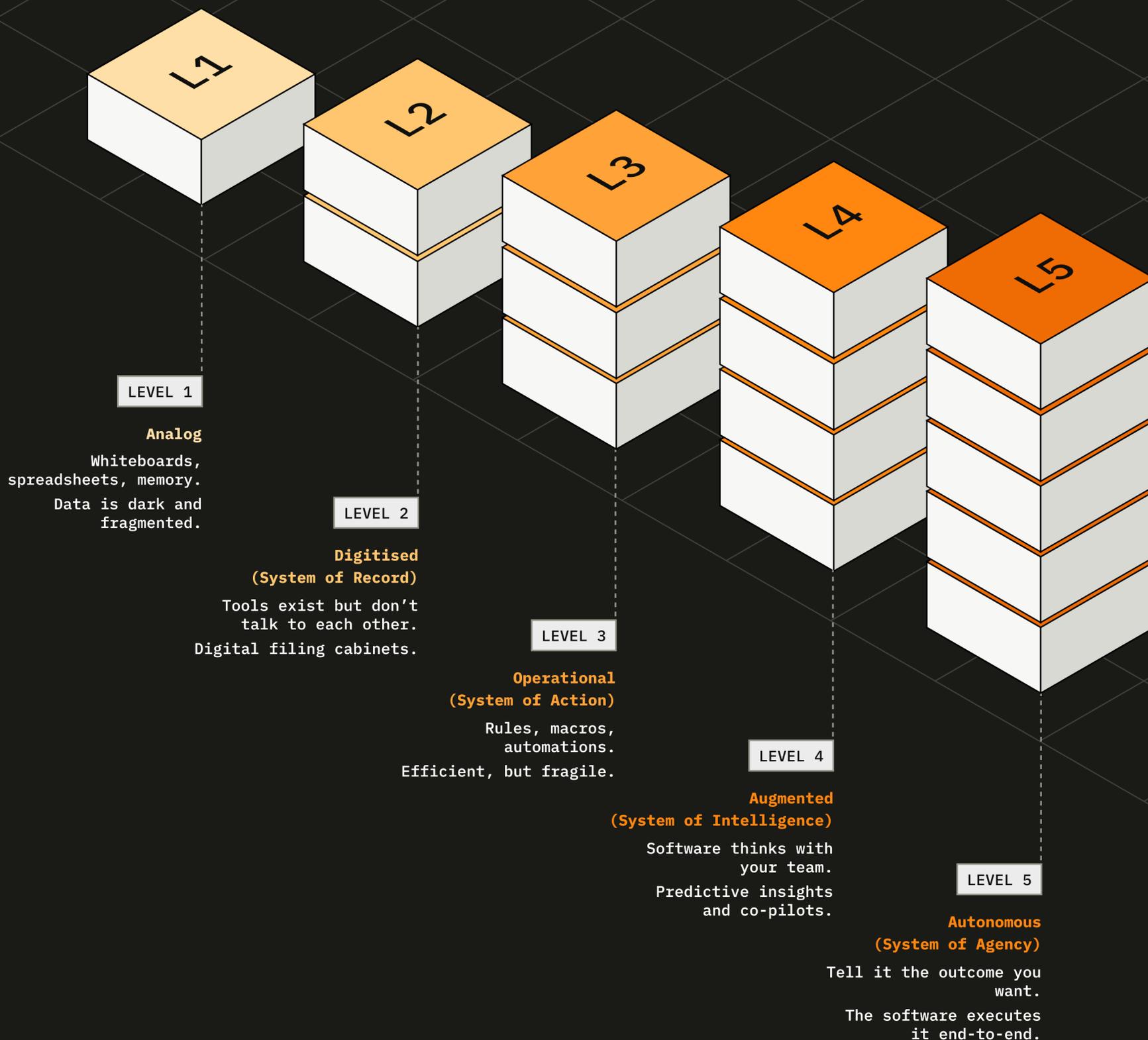
You don't become AI-ready by dropping AI into this flow. You become AI-ready by understanding how these processes really operate today, where humans are compensating for broken systems, where data gets lost, and where automation is pretending to be intelligent.
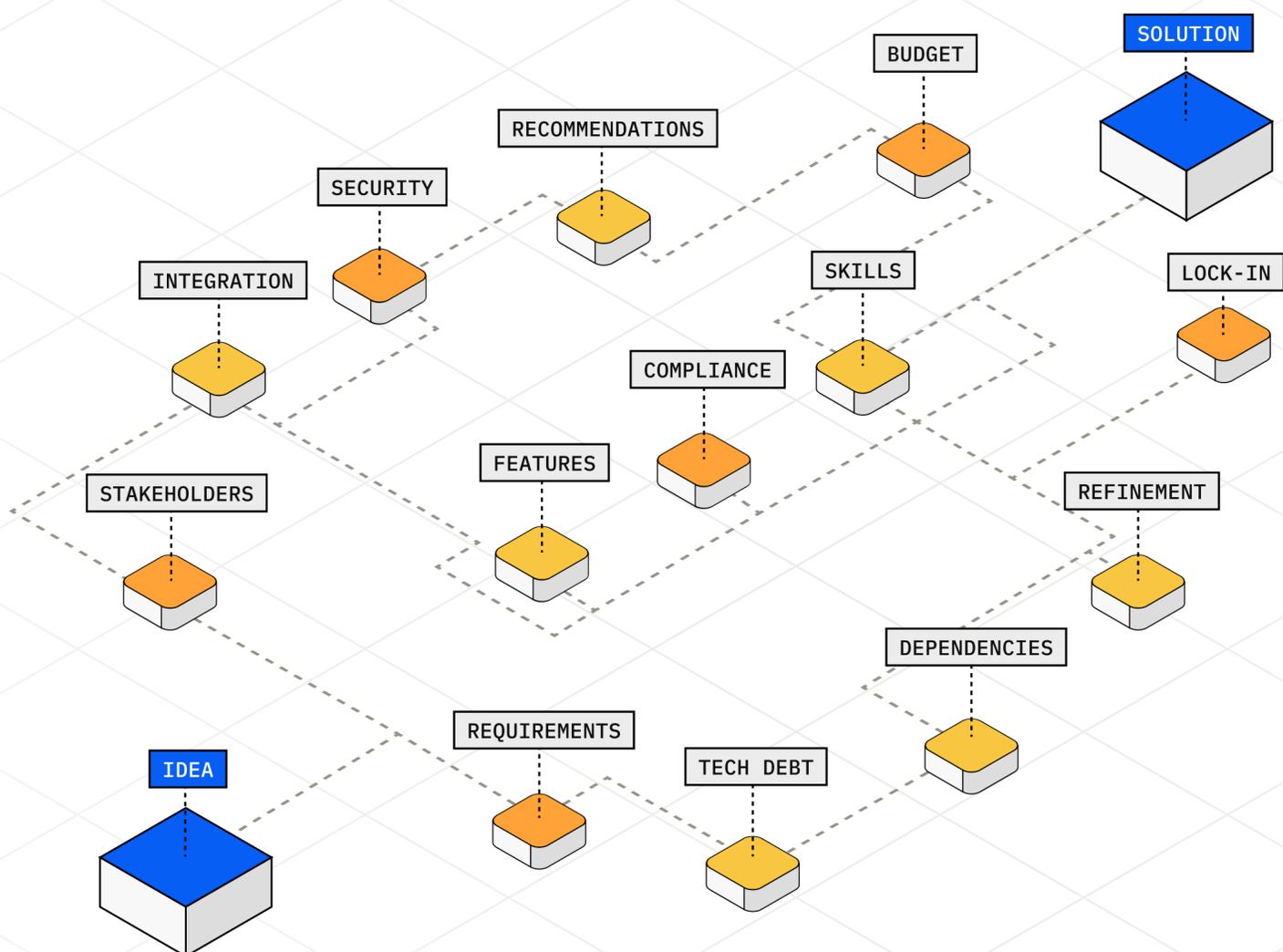
Introducing the 5 levels: From survival to autonomy.

The Dragonfly AI–Readiness Framework doesn't measure how many tools you own. It measures how much human effort is required to move work from one step to the next within your core processes.

Each process can be implemented at one of five levels. These aren't marketing tiers; they represent a fundamental evolution in what you're asking your software to do. And critically, they determine the ceiling of what AI can do for you. At every level, AI can add value, but the nature and scale of that value changes dramatically as you progress.

LEVEL 1

Analog
Whiteboards, spreadsheets, memory. Data is dark and fragmented.

LEVEL 2

Digitised (System of Record)
Tools exist but don't talk to each other. Digital filing cabinets.

LEVEL 3

Operational (System of Action)
Rules, macros, automations. Efficient, but fragile.

LEVEL 4

Augmented (System of Intelligence)
Software thinks with your team. Predictive insights and co-pilots.

LEVEL 5

Autonomous (System of Agency)
Tell it the outcome you want. The software executes it end-to-end.

LEVEL 1

Analog (Survival)

Whiteboards. Spreadsheets. People remembering things in their heads. Data exists, but it's dark, fragmented and disconnected. The intent is simply to survive.
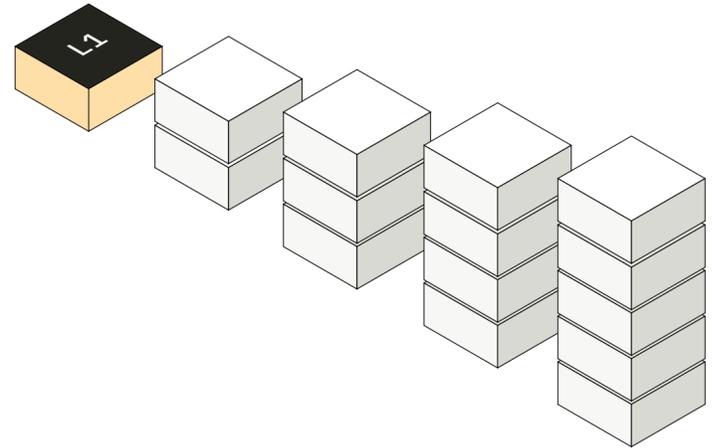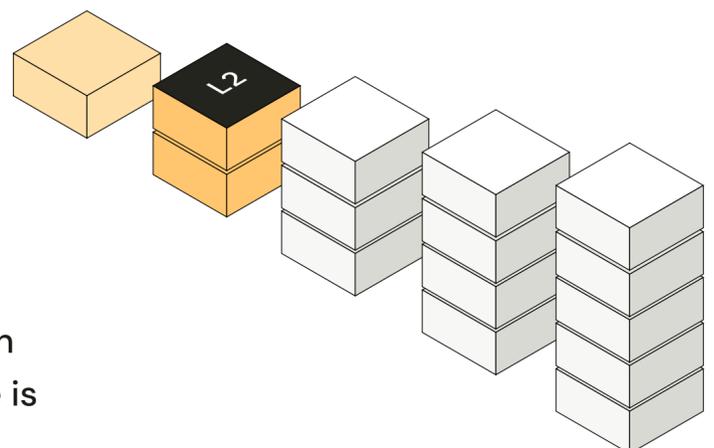
✨ WHAT AI CAN DO HERE

Very little at the systems level. The best you can hope for is point improvements: a smarter spreadsheet, a better template, an AI assistant helping an individual draft an email. The impact is real but isolated. There's no connected data for AI to reason over, so it can only help one person with one task at a time.

LEVEL 2

Digitised
(System of record)

You have a CRM, an ERP, a helpdesk. But they don't talk to each other. Work still moves manually between them. Your software is a filing cabinet: it stores information, but it doesn't move it.
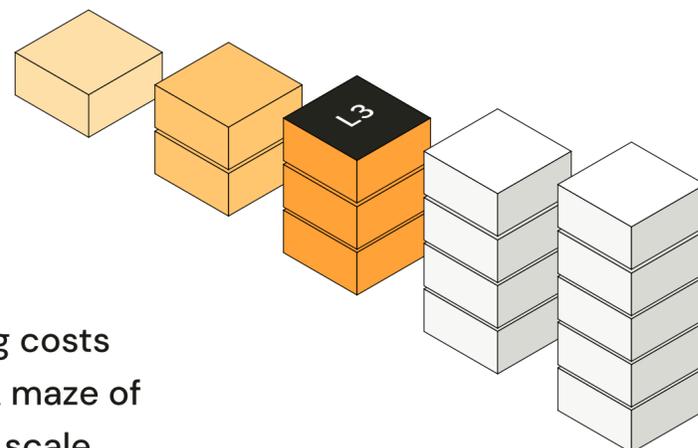
✨ WHAT AI CAN DO HERE

It can work within individual tools, summarising records, drafting responses, flagging anomalies inside a single system. But because your tools are siloed, AI is siloed too. It can make you faster inside one application, but it can't see across your business.

LEVEL 3

Operational
(System of Action)

Rules. Macros. Automations. "If X happens, do Y." You're cutting costs by reducing clicks and admin hours. It's efficient, but fragile. A maze of rules holding together processes that were never designed to scale.
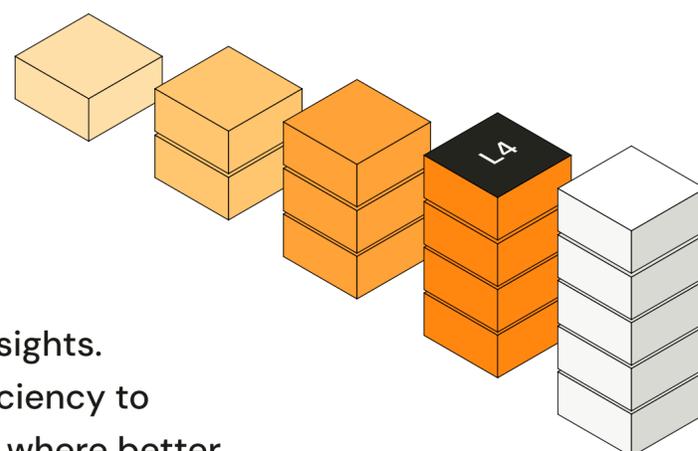
✧ WHAT AI CAN DO HERE

Now it gets interesting. Because your systems are connected, even if only through brittle rules, AI can start operating across them. It can trigger workflows, enrich data between platforms, and automate multi-step tasks. The ceiling lifts from individual productivity to process-level efficiency. But the logic is still rigid: AI is following your rules, not making its own judgements.

LEVEL 4

Augmented
(System of Intelligence)

Now the software starts thinking with your team. Predictive insights. Copilots. Context-aware workflows. The intent shifts from efficiency to effectiveness, from cutting costs to unlocking revenue. This is where better decisions start compounding.
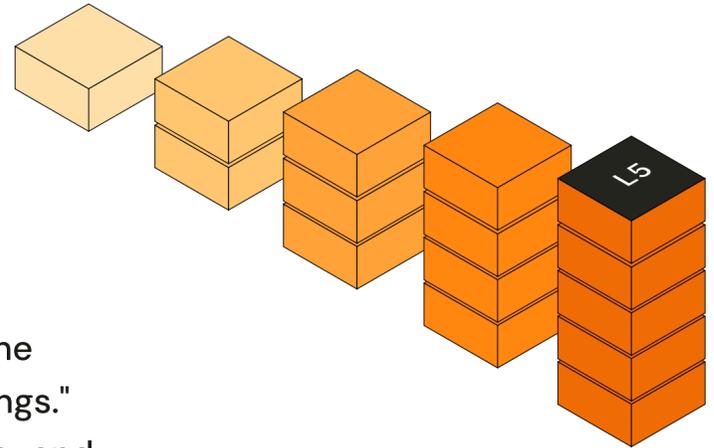
✧ WHAT AI CAN DO HERE

This is where the ROI equation flips. AI isn't just saving time, it's improving outcomes. It can score leads by intent, predict churn before it happens, draft responses informed by the full customer history, and surface insights that no human would have time to find. The ceiling lifts again: from process efficiency to decision quality.

LEVEL 5

Autonomous (System of Agency)

The real leap. You don't tell the system what to do, you tell it the outcome you want. "Resolve this ticket." "Book qualified meetings." "Ship this feature." The software executes the workflow end-to-end, only looping in humans when it genuinely needs judgement.

> ✦ **WHAT AI CAN DO HERE**
>
> Everything. The entire process runs autonomously, AI plans, acts, evaluates, and adjusts. Humans set goals and handle edge cases. The ceiling isn't efficiency or even decision quality, it's capacity. Your business can operate at a scale that was previously impossible without proportional headcount.

The point isn't that Level 5 is the only place where AI matters.

AI adds value at every level. But the *magnitude* of that value compounds as you move up. A company stuck at Level 2 is leaving the majority of AI's potential on the table; not because they lack ambition, but because their infrastructure can't support it.

Everyone thinks they're Level 4.

Almost every leadership team we speak to believes they're already operating at an advanced level. They have a CRM. They have dashboards. They've rolled out a copilot, maybe experimented with agents.

So they assume they're "AI-ready."

But when we map their real workflows, the picture changes fast. Data is still being copied between systems by hand. Decisions still live in people's heads.

Automation exists, but it's brittle, a patchwork of if/then rules duct-taped across tools that were never designed to work together. That's Level 2 and Level 3 behaviour wearing a Level 4 badge.

This is exactly where most AI projects quietly fail. You can't layer intelligence on top of fragmentation and expect transformation. You just end up with chaos, a lot more noise and more surface-level automation masking deeper structural problems.

AI doesn't fix broken processes. It exposes them.

Level 5 isn't the destination.
It's a choice.

The framework isn't a leaderboard. Moving every process to Level 5 isn't the goal, and pursuing that would be as misguided as buying tools without a strategy.

L5 makes sense when a process is defined by high data complexity, multiple competing inputs, and decisions that need to be made faster or more accurately than any human team can manage.

A weekly internal report doesn't need to be L5. Neither does a low-volume, high-touch enterprise sales process where relationship and judgment matter more than throughput.

The mark of a genuinely AI-mature company isn't the number of L5 processes it runs. It's the clarity with which it has decided which ones deserve to be there, and the discipline to leave the others alone.

> **"**
> *The mark of a genuinely AI-mature company isn't the number of L5 processes it runs.*

Account targeting, where you're triangulating intent signals, firmographic data, product usage, and market timing across thousands of accounts simultaneously. Supply chain optimisation, where variables shift in real time and the cost of a wrong call compounds quickly.

These are processes where autonomous execution doesn't just save time, it changes the quality of the outcome entirely.

Moving from L3 to L5 shouldn't mean adding more vendors. Look at the customer support chain, the jump to L5 is less about stacking new platforms and more about changing the intent behind how the process is designed. Who's in the loop? Where does human judgment still matter?
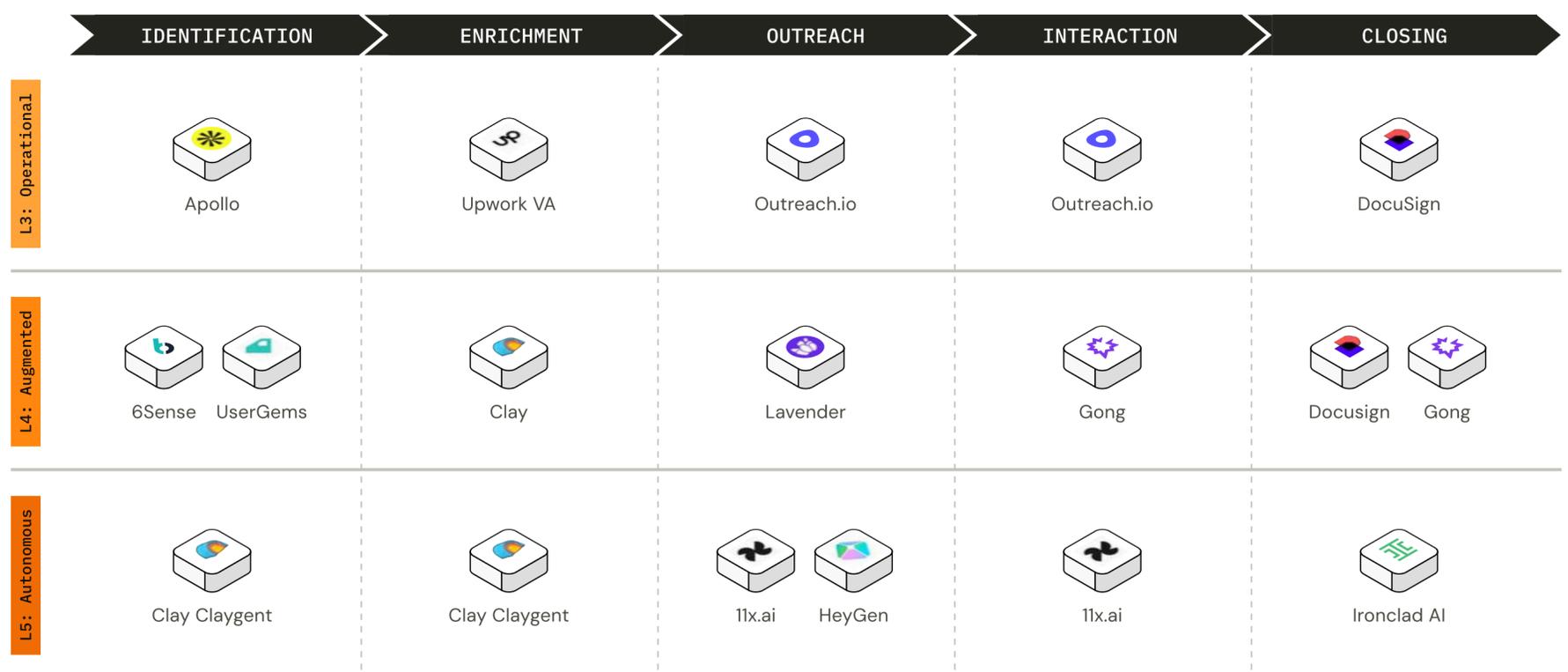
The tools should follow that thinking, not the other way around.

The first step isn't buying AI tools.
It's understanding what you're building upon.

Where do your workflows sit?

The framework isn't theoretical. We've mapped concrete processes for every major business function, the exact sequence of stages, the specific tools at each readiness level, and the metrics that shift as you move up. Here are two examples:

Outbound Sales: The Pipeline Chain

	IDENTIFICATION	ENRICHMENT	OUTREACH	INTERACTION	CLOSING
L3: Operational	Apollo	Upwork VA	Outreach.io	Outreach.io	DocuSign
L4: Augmented	6Sense UserGems	Clay	Lavender	Gong	Docusign Gong
L5: Autonomous	Clay Claygent	Clay Claygent	11x.ai HeyGen	11x.ai	Ironclad AI

Note: These are illustrative stacks, not prescriptions. The right tools depend on your team, your processes, and your stage. That's exactly what Dragonfly helps you figure out.

L3: Operational

At Level 3, the goal is volume.

High volume, low cost per touch. You're running Apollo for bulk lead export, a virtual assistant from Upwork doing manual research, Outreach.io firing static email sequences, and DocuSign closing deals with standard templates.

The metric you care about is cost per meeting. It works, until it doesn't.

L4: Augmented

At Level 4, the goal shifts to conversion.

You're using 6sense or UserGems for intent signals, Clay to orchestrate enrichment from 50+ data sources, Gong for revenue intelligence and deal health analysis. The metric shifts to average contract value.

You're not sending more emails, you're sending better ones to better people.
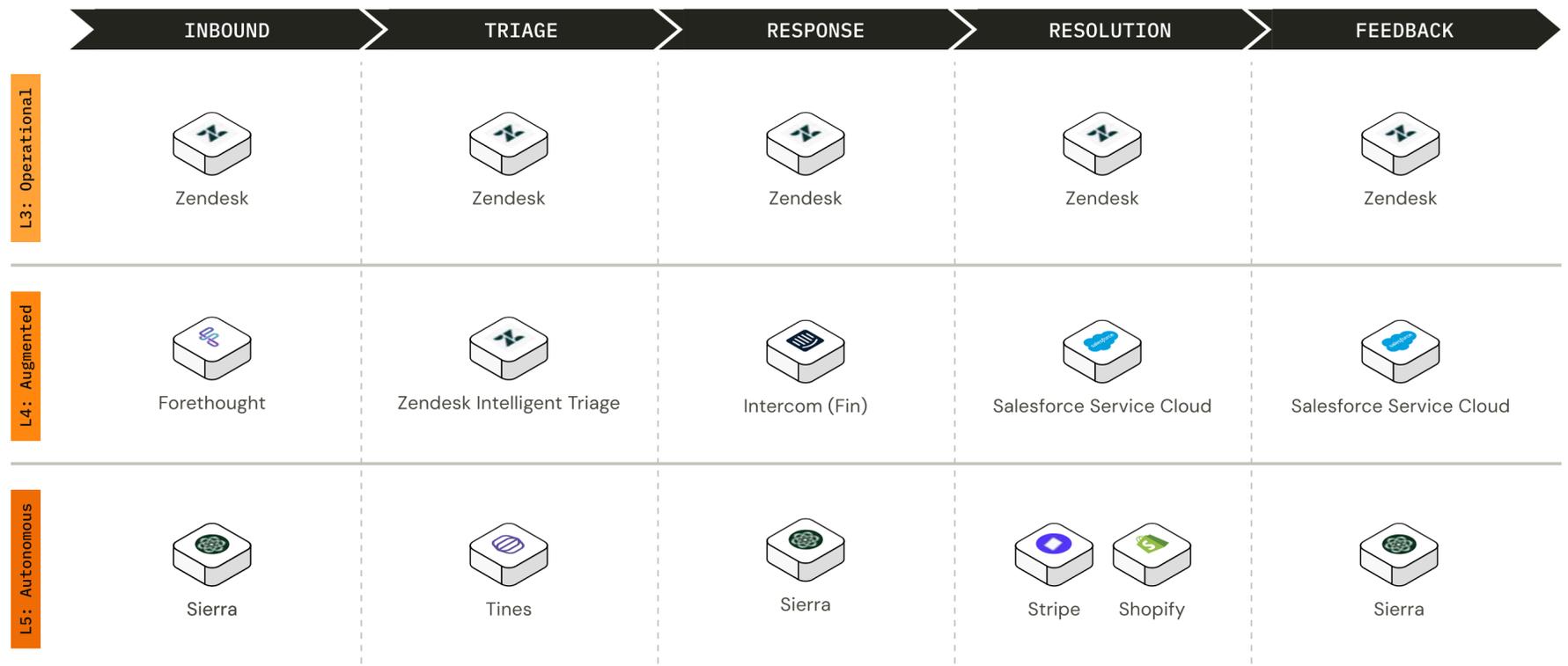
L5: Autonomous

At Level 5, the pipeline builds itself.

Clay's Claygent autonomously scrapes websites to qualify fit. 11x.ai or Artisan's Ava sends, replies, and books meetings without human involvement. HeyGen generates personalised video outreach on the fly. Ironclad AI auto-redlines buyer contract changes against your company playbook.

The system runs while you sleep.

The gap between Level 3 and Level 5 isn't just about better tools.
It's a fundamentally different relationship between your team and your software.

Customer Support: The Resolution Chain

	INBOUND	TRIAGE	RESPONSE	RESOLUTION	FEEDBACK
L3: Operational	Zendesk	Zendesk	Zendesk	Zendesk	Zendesk
L4: Augmented	Forethought	Zendesk Intelligent Triage	Intercom (Fin)	Salesforce Service Cloud	Salesforce Service Cloud
L5: Autonomous	Sierra	Tines	Sierra	Stripe · Shopify	Sierra

Note: These are illustrative stacks, not prescriptions. The right tools depend on your team, your processes, and your stage. That's exactly what Dragonfly helps you figure out.

L3: Operational

At Level 3, you've consolidated onto Zendesk with keyword routing rules, canned macros for responses, and an automated CSAT survey after ticket close.

The metric is deflection rate. How many tickets can you prevent from reaching a human?

It's cost-cutting through consolidation.

L4: Augmented

At Level 4, support becomes a retention engine.

Forethought surfaces knowledge base articles before a ticket is even created. Zendesk Intelligent Triage detects sentiment and intent. Fin from Intercom drafts replies based on support history for agent approval. Salesforce Service Cloud gives your agent a single-pane view of customer lifetime value.

The metric shifts to net revenue retention.

L5: Autonomous

At Level 5, issues are resolved without a human touching them.

Sierra or Decagon handles the conversational dialogue. Tines connects the AI to your database and systems of record. Stripe or Shopify gets updated automatically. Sierra monitors the LLM in real time for hallucinations.

The customer's problem is solved 'end-to-end' by the system.

The motto at Level 5 is simple:
let AI work for your customers, not just for your employees.

Where Dragonfly comes in.

Dragonfly isn't another AI feature you bolt onto an already overloaded stack. We're building the AI-Readiness Platform; the intelligence layer between businesses and the software they need to thrive. Our platform doesn't start with vendors. It starts with your processes.

From there, Dragonfly's Automated Solutions Architect takes over, recommending the exact tools, integrations and architectural shifts required to move from record-keeping, to intelligence, to genuine agency. And we're not guessing.
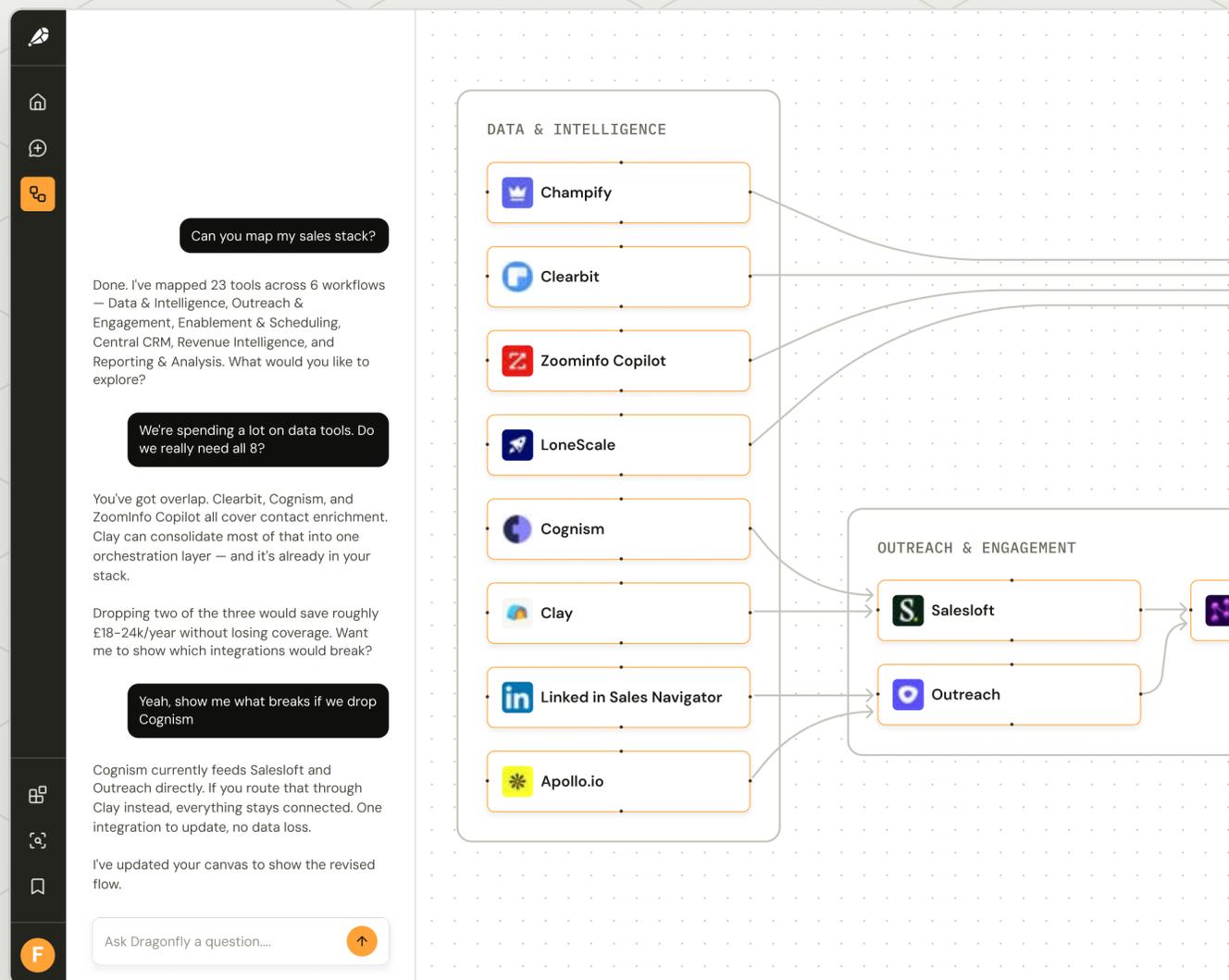
> " *Context is everything. AI without context is just fast guessing.*

We map the real flow of work across your teams, score how your current stack implements those processes today, and surface the gaps holding you back.

Dragonfly has mapped over 250,000 software vendors; from the health of the organisation behind them, to the capabilities and functionality their products provide, to how advanced their AI features are today. That catalogue is what powers our recommendations.

Crucially, we capture the context that most audits miss, not just which tools you use, but how they connect, where information drops out between them, and what your people are doing to fill the gaps. That context is everything. AI without context is just fast guessing. AI with context is decision-making.

Can you map my sales stack?

Done. I've mapped 23 tools across 6 workflows — Data & Intelligence, Outreach & Engagement, Enablement & Scheduling, Central CRM, Revenue Intelligence, and Reporting & Analysis. What would you like to explore?

We're spending a lot on data tools. Do we really need all 8?

You've got overlap. Clearbit, Cognism, and ZoomInfo Copilot all cover contact enrichment. Clay can consolidate most of that into one orchestration layer — and it's already in your stack.

Dropping two of the three would save roughly £18–24k/year without losing coverage. Want me to show which integrations would break?

Yeah, show me what breaks if we drop Cognism

Cognism currently feeds Salesloft and Outreach directly. If you route that through Clay instead, everything stays connected. One integration to update, no data loss.

I've updated your canvas to show the revised flow.

Ask Dragonfly a question....

DATA & INTELLIGENCE

Champify
Clearbit
Zoominfo Copilot
LoneScale
Cognism
Clay
Linked in Sales Navigator
Apollo.io

OUTREACH & ENGAGEMENT

Salesloft
Outreach

One thing we're deliberate about is independence. Vendors can't pay to influence our recommendations. Our evaluations aren't weighted by who has the biggest marketing budget or the loudest presence at conferences.

When we recommend that a tool is the right fit for a stage in your process, it's because we've benchmarked it against every credible alternative for your specific situation, your team size, your existing stack, your stage of growth.

That specificity matters. The right answer at L4 for a 20-person sales team is rarely the same as it is for a 300-person one. Legacy platforms built for enterprise scale can be the wrong call for a company at Series B, just as lightweight point solutions become a liability once complexity grows.

Our job isn't to validate passed decisions or push you toward whatever is newest. It's to tell you what's actually right for where you are today, and what you'll need to get to where you're going.

Start with a template

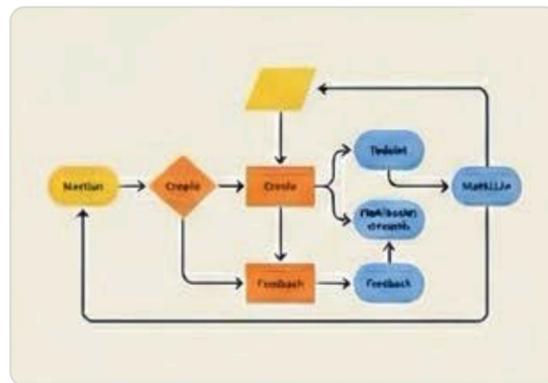Select a template or describe your own workflow.

Dragonfly maps your existing stack against it, highlights gaps and overlaps, and suggests tools that actually integrate with what you've already got.
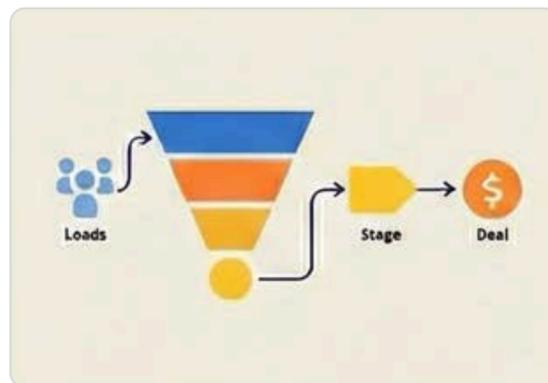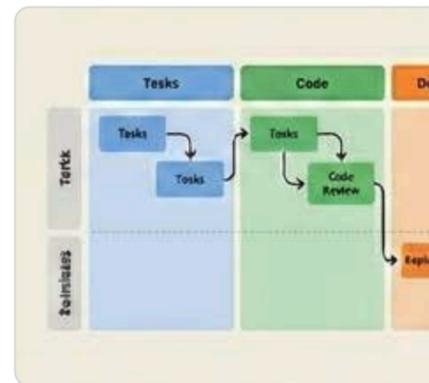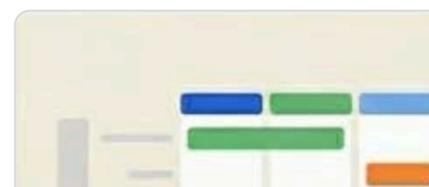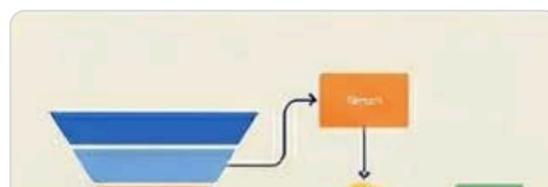

Sales pipeline setup
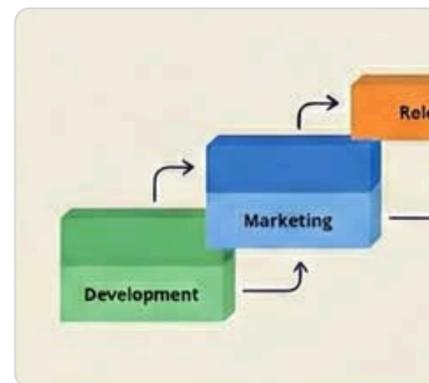
Customer suppor infrastructure

Content marketing workflow


Engineering workf

Three pillars. One framework.

The Technology pillar we're launching this month is the first step. It benchmarks your tooling stack against the best available in the market for your use case, department by department, stage by stage. It tells you whether you're running Level 3 tools while your competitors are operating at Level 4, and most importantly exactly what to do about it.
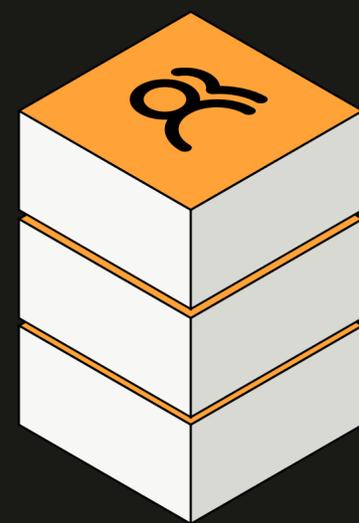
But technology is only one of three pillars. A company can only go so far by optimising its tech stack alone. Without a clear AI strategy, guidelines on data use, risk mitigation or fair use policies you get data leaks, overspending, and AI slop. Without investing in your people, coaching, upskilling, building a culture that shares knowledge and celebrates AI wins even the best tools sit unused and we see this everyday.
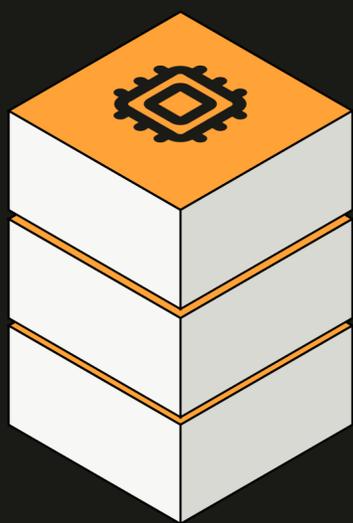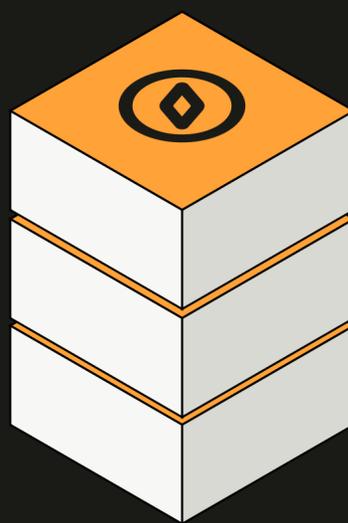
[TECHNOLOGY]   [STRATEGY]   [PEOPLE]

What connects all three pillars is context. Your tools need context to work together. Your strategy needs context about what's actually happening on the ground. Your people need context about what AI can do and where it fits. Dragonfly captures and connects that context across all three, so that every recommendation we make is grounded in how your business actually runs, not how it looks on a slide deck.

We'll be launching the Strategy and People pillars later this year. Together, the three form the full picture of what it takes to move from where you are today to a business that can continuously evolve.

This is just the beginning.

We didn't build this framework to create another analytics product or to sell prettier dashboards. There are enough tools telling you what happened yesterday. And trust us, we've mapped them.

We built it because the next generation of companies won't win by owning more software. They'll win by evolving faster than their market.

> **"**
>
> **The next generation of companies won't win by owning more software. They'll win by evolving faster.**

The organisations that survive won't be the ones with the biggest tech stacks. They'll be the ones that can continuously redesign how work flows through their business, reshaping teams, rethinking processes, reimplementing their tooling as the world changes around them, and **empowers their employees to move fast.**

That journey doesn't start with AI agents or autonomous workflows. It starts with brutal clarity about how your business really runs today.

That's the layer Dragonfly exists to unlock.

Stop guessing,
start building.

Map your processes. Score your stack.
See exactly where to invest next, tailored to your
industry, your team, your goals.

Get started today with your AI-Readiness score.

askdragonfly.com