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Enterprise Accounts AI User Story Validation

UC Berkeley Consulting Engagement
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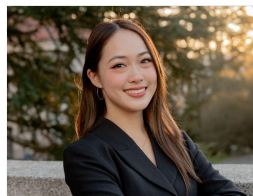
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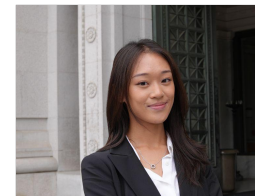
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Executive Summary

Problem Scope

Integrating AI in the sales process unlocks time and insight needed to shift from administrative work to revenue-generating activity within **[Company]'s Enterprise Accounts**



Sales reps are responsible for managing large, multi-stakeholder accounts across a broad medical device portfolio



Fragmented workflows, limited system integration, and manual processes contribute to significant administrative burden



Inefficiencies reduce the time sales reps can dedicate to revenue-generating and customer facing activities

Our Approach AI User Story Validation



Identifying high-friction administrative tasks

Within the Enterprise Accounts workflow that represent the greatest opportunity for AI-driven efficiency



Assessing gaps in system integration

Across the tools and platforms that create redundant work or limit real-time visibility into sales processes



Validating AI user stories

Against operational realities and prioritizing use cases based on feasibility, impact, and implementation readiness



Our Research Design

Interview-Heavy, Survey-Light

Research Design — User Story Validation

Interview-Led Approach

Our Focus: Enterprise Accounts

The core challenge for EA reps lies in orchestrating multiple business units selling into the same customer and making more time for customer-facing interactions.

~80

Person Population

Sample size of EA Leaders
and Sales Reps

15

Interviews Conducted

Primary Data Source across DEA,
Distributor, and Sales Roles

Key Takeaway

Across 15 interviews and 4 process phases, we identified 12 critical pain points concentrated in contract execution and post-deal growth, where AI integration could reclaim significant time currently lost to manual, fragmented workflows



Primary Research Questions

The Big Deal Process

How does the surveyed process compare to the lived reality of sales reps across the 4 phases?

Cross-BU Coordination

What is the friction between business units, and what are sellers' biggest pain points?

Integration of AI

Where are the opportunities for AI Integration in the sales process?

Identifying Friction — The Big Deal Process

The EA Selling Motion

The most structured and cross-functional selling motion in the organization

Account Review

Account Planning

Contract Execution

Post-Deal Growth

Process Validation

Time Taken

“Tell me about a deal that took longer than expected. What next steps did you take?”

Biggest Areas of Frustration

“What are the top 3 most frustrating parts of your workflow today?”

Potential AI Tools

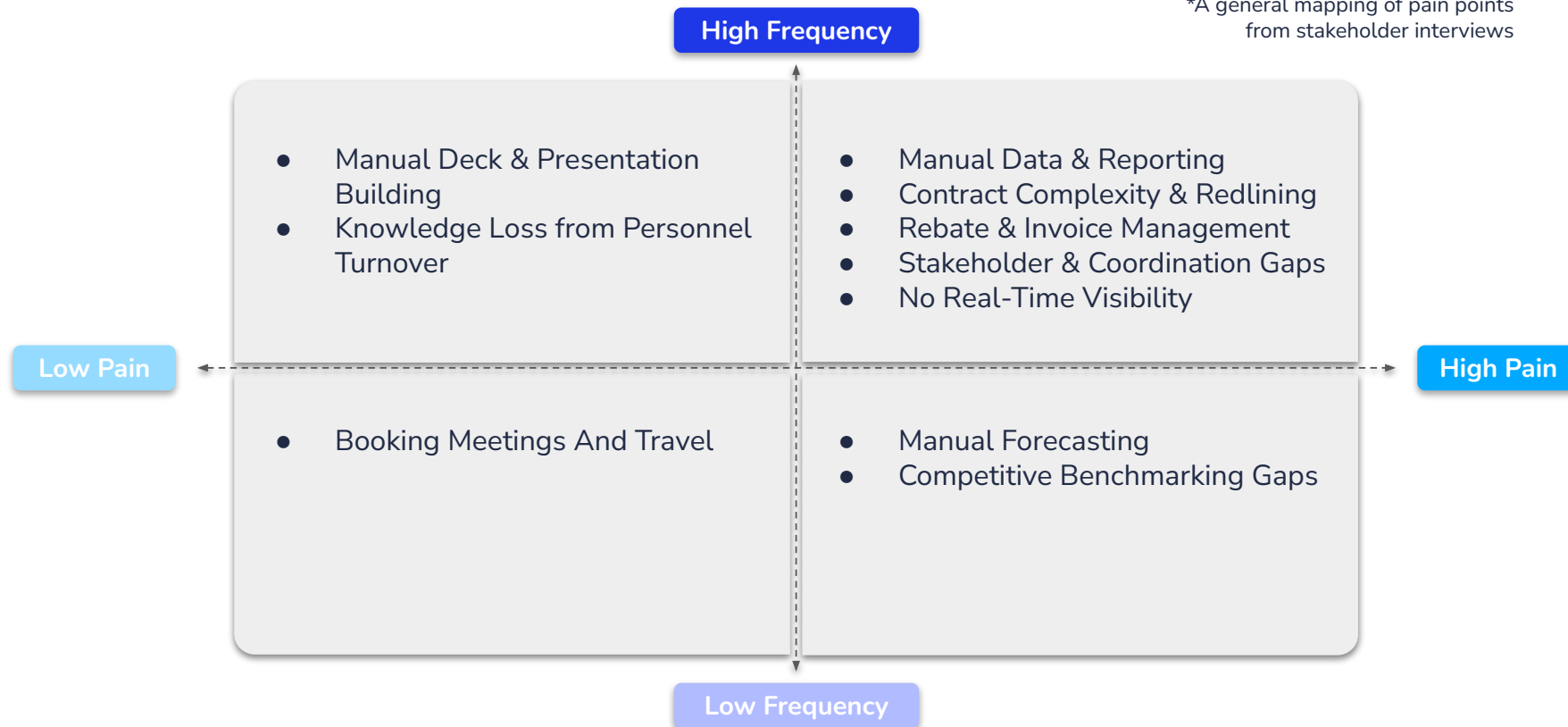
“What kinds of tools (AI or other) do you currently use in your day-to-day work? ”

Methodology

Across the four phases of the EA selling motion, our stakeholder interviews examined the timeline of a deal cycle, core areas of operational friction, and current or prospective AI tool adoption

Interview Findings — Pain Point Matrix

*A general mapping of pain points
from stakeholder interviews



Interview Highlights — The Structural Problem

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1

The Data Exists, But It Isn't Accessible

"The data exists, someone is calculating it — if that could be automated ahead of quarter closure, that would change everything."

— Director, Enterprise Accounts

Key Takeaway:

The data is difficult and time-consuming to access, making every insight harder to reach than it should be

2

Administrative Work Is Crowding Out Customer Time

"The end goal is to unburden the time we spend doing analysis so we can spend that time chasing opportunities with the customer."

— Director, Enterprise Accounts

Key Takeaway:

Too many hours go to manual data gathering and internal admin duties. Not enough go to actual selling

3

Existing Tools Are Being Used Below Their Potential

"AI should be able to do this today — we're just not there yet."

— Director, Enterprise Accounts

Key Takeaway:

Every major tool is underused or misconfigured, meaning technology that could transform workflows is largely unexplored

Phase-by-Phase Findings
**High Frequency, Interview-Validated
Pain Points**

Phase 1 — Account Review

Evaluate the existing account portfolio to identify where growth opportunities, contract gaps, and competitive risks exist

Top Pain Points

Number of validated interviews*

“The challenge is putting those data sources together and feeding it to the sales team in a way they can actually use.”

— Director, Enterprise Accounts

1

Fragmented Data Sources & Manual Aggregation 12/15*

No single system gives the EA team a complete view of any account

2

Static & delayed reporting from analysts 10/15*

Analysts create static reports in form of bulk excel spreadsheets

3

No contract expiration monitoring 5/15*

Limited visibility into renewals creates missed opportunities

Account review and prioritization is a highly manual process, when it should be a data-driven process that sets the strategic agenda for the quarter → lack of visibility narrows the window of opportunity for selling

Opportunity for AI Usage

A **unified data intelligence layer** that synthesizes internal sales data, contract performance, and market signals into a real-time, on-demand insights feed. This intelligence layer would also include proactive alerts surfacing expiring contracts and underperforming accounts before they become urgent.

Phase 2 — Account Planning

Build the strategic plan for priority accounts by mapping stakeholders, aligning internal teams, and defining the commercial approach

Top Pain Points

“ Connecting those stakeholders and keeping traction with where things are in the process — time and connectivity are the largest challenges. — *Distributor Sales & Operations* ”

Number of validated interviews*

1

Manual stakeholder & account mapping 11/15*

Stakeholder knowledge scattered across spreadsheets and histories

2

Multi-stakeholder coordination delays 10/15*

Cross-functional approvals and disconnected workflows slow planning

3

No unified CRM across EA and OU teams 9/15*

Separate CRM systems, limiting visibility and coordination

Scattered stakeholder knowledge + fragmented cross-team planning processes → slow planning cycles and inconsistent outcomes that depend heavily on individual expertise

Opportunity for AI Usage

An AI-maintained **stakeholder directory** that auto-updates as personnel changes occur, combined with an intelligent project tracking layer that maps stakeholder inputs, deadlines, and decision status across the planning cycle. This gives every team member a real-time view of where things stand and what's needed next.

Phase 3 — Contract Execution & RFP

Respond to RFP's, develop pricing proposals, negotiate contract terms, and navigate internal approvals to get a signed agreement in place

Top Pain Points

“ Someone who wasn't part of any of the conversations writes the contract based on what the form says. There's so much redundancy and errors. — Director, Enterprise Accounts ”

Number of validated interviews*

1

Contract handoff errors & redundancy 11/15*

Manual handoffs create duplicate work and downstream errors

2

RFP data gathering is slow & error-prone 10/15*

Fragmented data slows proposals and increases inaccuracies

3

Manual redlining & inconsistent negotiation 9/15*

Manual reviews create inconsistent contract terms across portfolios

Manual and inconsistent contract execution, combined with low-visibility handoffs and error-prone tracking processes → delays, operational inefficiencies, and costly downstream issues for both internal teams and customers

Opportunity for AI Usage

AI that **drafts contract language** from deal discussion notes, scans incoming redlines for deviations from standard terms, suggests consistent counter-positions based on established playbooks, and auto-generates accurate RFP data packages. This compresses what currently takes months into days while dramatically reducing the error rate.

Phase 4 — Post Deal Growth & QBR

Manage the account after close through tracking contract performance, monitoring rebate attainment, and preparing QBR's

Top Pain Points

Number of validated interviews*

“ I'm reaching out to finance and distribution until 9pm to find out if the revenue came in yet. I shouldn't have to do that. — Director, Enterprise Accounts ”

1

Rebate tracking is entirely manual 11/15*

Spreadsheet-based tracking creates delays, errors, and limited visibility

2

No contract performance dashboard 10/15*

Limited visibility into contract health drives reactive account management

3

Quarter-end process is manual & reactive 10/15*

Teams spend quarter-end fixing issues instead of driving growth

Manual rebate tracking, Excel-based pricing management, and reactive workflows → limited visibility into contract performance, frequent pricing discrepancies, and teams focused more on fixing issues than driving proactive growth.

Opportunity for AI Usage

A **unified data intelligence layer** that synthesizes internal sales data, contract performance, and market signals into a real-time, on-demand insights feed. This intelligence layer would also include proactive alerts surfacing expiring contracts and underperforming accounts before they become urgent.

Data-Driven Insights
**Validating 2023 DEA Survey Data
Against Interviews**

89 Use Cases Narrowed to the Top 25 – Validated Against Field Interviews

94

Hours of friction, per person, per month

This data, cross-referenced with **Deloitte, ZS, and UC Berkeley studies**, highlights a massive productivity leak.

89

Commercial pain points

Initial commercial catalog identifying broad organizational friction and inefficiencies across functions.

Top 25 Use Cases from GCO Sales AI Use Catalog

Rank	ID	Name	EA Weighted Priority Score (0-3)	Quadrant	Hrs Saved/Mo	Interview Validated?
1	SP-11/SA-09	Order Visibility & Allocation Assistant	2.3	Q2: Strategic Bet	3	No
2	CPQ-01	Intelligent Quote Generator	2.9	Q2: Strategic Bet	3	Partial
3	CPQ-03/10	Discount Guardrail, Approval & Tracking Engine	2.8	Q2: Strategic Bet	3.2	Partial
4	SP-07	Pipeline Review Prep	2.6	Q1: Quick Win	1.32	Partial
5	SA-06	Sales Reporting & Analytics Copilot	1.6	Q1: Quick Win	1.1	Validated
6	SP-01	Intelligent CRM Capture	1.6	Q1: Quick Win	0.88	Validated
7	CPQ-05	RFP/RFI Response Accelerator	2.7	Q2: Strategic Bet	3	Validated
8	SA-10	Rebate & Invoice Status Copilot	2.0	Q1: Quick Win	1.2	Validated
9	SP-04	Meeting Prep Briefing	2.0	Q1: Quick Win	1.2	Validated
10	SP-14	Multi-BU Deal Orchestration Dashboard	2.6	Q2: Strategic Bet	2.1	Validated
11	SA-01	Order Entry & Validation Automator	1.7	Q2: Strategic Bet	3	No
12	CPQ-11	Deal Desk Intake & Triage Automator	1.9	Q2: Strategic Bet	2.4	Partial
13	CPQ-04	Contract Clause Advisor	1.9	Q2: Strategic Bet	3.2	Validated
14	SA-04	Rebate & Chargeback Calculator	2.1	Q2: Strategic Bet	1.75	Validated
15	CPQ-08	Renewal & Upgrade Offer Engine	2.0	Q2: Strategic Bet	2.4	Partial
16	CPQ-07	GPO & IDN Contract Compliance Checker	1.9	Q2: Strategic Bet	1.2	Validated
17	SP-13	QBR Deck Prep	1.7	Q1: Quick Win	4.9	Validated
18	AT-05	Account Growth Planner	1.8	Q1: Quick Win	2.8	Validated
19	PS-06	Contract Renewal Risk Scorer	1.2	Q1: Quick Win	1.6	Partial
20	SC-04	Clinical Evidence Recommender	1.3	Q1: Quick Win	2	No
21	PS-07	Installed Base Intelligence Dashboard	1.7	Q1: Quick Win	1.2	Validated
22	LQ-05	White Space Identifier	1.8	Q1: Quick Win	1.4	Partial
23	AT-08	Customer Health Score	1.7	Q1: Quick Win	2.1	Validated
24	SP-12	Knowledge Search & Ask-Anything Bot	1.3	Q1: Quick Win	1.5	Validated
25	PS-05	Service-to-Sales Opportunity Spotter	1.1	Q1: Quick Win	0	No

15

Qualitative interviews used to validate the 25 ranked use cases;

13

Directly validated

7

Partially validated

4

Had no alignment

Key Takeaway

The qualitative interview findings confirm that **13 out of the top 25** ranked use cases align with the top self-reported pain points from EA representatives. This confirms that the **highest-priority EA challenges are heavily represented**.

Reframing the Data Through an EA Lens – Q1

Quick Wins by EA Priority



Strategic Isolation

Focusing on the **20 Q1 Quick Wins** re-sorted by **EA Weighted Priority Score**—the most critical dimension for EA sales organizations.



Defined Core Criteria

Quick Wins: High-value, high-feasibility opportunities for near-term deployment *without major infrastructure changes*.

20 Q1 Quick Wins, re-sorted by EA Weighted Priority Score

Original Rank	ID	Name	EA Weighted Priority Score (0-3)	Quadrant	Hrs Saved/Mo	Interview Validated?
4	SP-07	Pipeline Review Prep	2.6	Q1: Quick Win	1.32	Partial
8	SA-10	Rebate & Invoice Status Copilot	2.0	Q1: Quick Win	2	Validated
9	SP-04	Meeting Prep Briefing	2.0	Q1: Quick Win	1.2	Validated
18	AT-05	Account Growth Planner	1.8	Q1: Quick Win	2.8	Validated
22	LQ-05	White Space Identifier	1.8	Q1: Quick Win	1.4	Partial
28	SA-12	Price Governance & Administration Copilot	1.8	Q1: Quick Win	1.25	Partial
23	AT-08	Customer Health Score	1.7	Q1: Quick Win	2.1	Validated
21	PS-07	Installed Base Intelligence Dashboard	1.7	Q1: Quick Win	1.2	Validated
17	SP-13	QBR Deck Prep	1.7	Q1: Quick Win	4.9	Validated
26	SC-10	Stakeholder Mapping & Buying Committee Navigator	1.6	Q1: Quick Win	1.8	Validated
5	SA-06	Sales Reporting & Analytics Copilot	1.6	Q1: Quick Win	1.1	Validated
6	SP-01	Intelligent CRM Capture	1.6	Q1: Quick Win	0.88	Validated
20	SC-04	Clinical Evidence Recommender	1.3	Q1: Quick Win	2	No
24	SP-12	Knowledge Search & Ask-Anything Bot	1.3	Q1: Quick Win	1.5	Validated
19	PS-06	Contract Renewal Risk Scorer	1.2	Q1: Quick Win	1.6	Partial
25	PS-05	Service-to-Sales Opportunity Spotter	1.1	Q1: Quick Win	0	No
37	RS-01	AI-Guided Remote Selling Workflow	0.6	Q1: Quick Win	0.36	No
50	SC-09	In-Procedure Support Assistant	0.5	Q1: Quick Win	1	No
46	SP-08	Commission & Incentive Tracker	0.4	Q1: Quick Win	2.1	Partial
35	SA-08	Master Data Quality & Hygiene Monitor	0.4	Q1: Quick Win	1	Validated

While the full catalog ranks use cases *across all nine seller personas*, this re-sorted, filtered view allows us to capture the most **EA-relevant opportunities**.

Reframing the Data Through an EA Lens – Q1

Quick Wins by EA Priority

EA Field-Validation – Refined Insights

	Original Rank	ID	Name	EA Weighted Priority Score (0-3)	Hours Saved	Interview Validated (out of 15)
⏏	17	SP-13	QBR Deck Prep	1.7	4.9	N/A
⏏	26	SC-10	Stakeholder Mapping	1.6	1.8	11 / 15

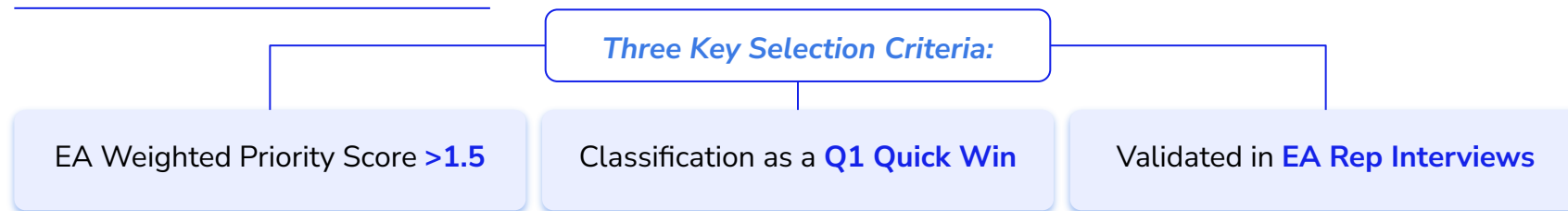
Quarter-end manual processes were cited in 10 of 15 interviews as a critical-tier pain point.

Key Takeaway

When **filtered specifically for EA reps**, items ranking lower in composite scoring *rose significantly*. These items—such as SP-13 and SC-10—were identified as critical-tier pain points and a foundational prerequisite for almost every other workflow improvement.

Q1 Quick Wins Deep Dive – 8 Use Cases Validated by Data, EA Scoring, & Field Interviews

Significance of Shortlist



ID	Name	EA Weighted Priority Score (0-3)	Quadrant	Hrs Saved/Mo	Interview Validated?
SA-10	Rebate & Invoice Status Copilot	2.0	Q1: Quick Win	2	Validated
SP-04	Meeting Prep Briefing	2.0	Q1: Quick Win	1.2	Validated
AT-05	Account Growth Planner	1.8	Q1: Quick Win	2.8	Validated
AT-08	Customer Health Score	1.7	Q1: Quick Win	2.1	Validated
PS-07	Installed Base Intelligence Dashboard	1.7	Q1: Quick Win	1.2	Validated
SP-13	QBR Deck Prep	1.7	Q1: Quick Win	4.9	Validated
SC-10	Stakeholder Mapping & Buying Committee Navigator	1.6	Q1: Quick Win	1.8	Validated
SA-06	Sales Reporting & Analytics Copilot	1.6	Q1: Quick Win	1.1	Validated
SP-01	Intelligent CRM Capture	1.6	Q1: Quick Win	0.88	Validated

Q1 Quick Wins Deep Dive – 8 Use Cases Validated by Data, EA Scoring, & Field Interviews

Significance of Shortlist

High-consensus pain points:

SA-10

Rebate Tracking

11 / 15
interviews

SC-10

Stakeholder Mapping

11 / 15
interviews

Most-common time drain:

SA-06

Data & Analyst
Report Delays

15 / 15
interviews

Highest measurable time saving:

10 / 15
interviews

QBR Deck Prep

SP-13

ID	Name	EA Weighted Priority Score (0-3)	Quadrant	Hrs Saved/Mo	Interview Validated?
SA-10	Rebate & Invoice Status Copilot	2.0	Q1: Quick Win	2	Validated
SP-04	Meeting Prep Briefing	2.0	Q1: Quick Win	1.2	Validated
AT-05	Account Growth Planner	1.8	Q1: Quick Win	2.8	Validated
AT-08	Customer Health Score	1.7	Q1: Quick Win	2.1	Validated
PS-07	Installed Base Intelligence Dashboard	1.7	Q1: Quick Win	1.2	Validated
SP-13	QBR Deck Prep	1.7	Q1: Quick Win	4.9	Validated
SC-10	Stakeholder Mapping & Buying Committee Navigator	1.6	Q1: Quick Win	1.8	Validated
SA-06	Sales Reporting & Analytics Copilot	1.6	Q1: Quick Win	1.1	Validated
SP-01	Intelligent CRM Capture	1.6	Q1: Quick Win	0.88	Validated



AI Integration Opportunities **For High Priority, Validated Use Cases**

AI Integration Opportunity — Top 12 Use Cases

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12 Validated Use Cases Mapped Across the EA Sales Process

ID	Name	Quadrant	Hrs Saved/Mo	Interview Validated?	Sales Phase
SP-04	Meeting Prep Briefing	Q1: Quick Win	1.2	Validated	Account Planning
SA-06	Sales Reporting & Analytics Copilot	Q1: Quick Win	1.1	Validated	Account Planning
SP-01	Intelligent CRM Capture	Q1: Quick Win	0.88	Validated	Account Planning
AT-08	Customer Health Score	Q1: Quick Win	2.1	Validated	Account Review
PS-07	Installed Base Intelligence Dashboard	Q1: Quick Win	1.2	Validated	Account Review
SC-10	Stakeholder Mapping & Buying Committee Navigator	Q1: Quick Win	1.8	Validated	Account Review
AT-05	Account Growth Planner	Q1: Quick Win	2.8	Validated	Account Review
SA-10	Rebate & Invoice Status Copilot	Q1: Quick Win	2	Validated	Contract Execution
CPQ-05	RFP/RFI Response Accelerator	Q2: Strategic Bet	3	Validated	Contract Execution
SP-14	Multi-BU Deal Orchestration Dashboard	Q2: Strategic Bet	2.1	Validated	Contract Execution
CPQ-04	Contract Clause Advisor	Q2: Strategic Bet	3.2	Validated	Contract Execution
SP-13	QBR Deck Prep	Q1: Quick Win	4.9	Validated	Post-Deal & QBR

Tiered Strategy

9
Q1 Quick Wins

Validated use cases that are **immediately deployable** given their high feasibility scores

3
Q2 Strategic Bets

Cases that address the deepest structural pain points, but are **best suited for Phase 2 implementation**

Total estimated time savings across all 12 recommendations: ~26.3 hrs/month/EA rep

AI Integration Opportunity — Top 4 Picks

Account Planning

Use Cases: Meeting Prep Briefing · Sales Reporting & Analytics Copilot · Intelligent CRM Capture

Top Pick: SP-04 | Meeting Prep Briefing →

Automatically generates a personalized pre-meeting brief so reps walk in prepared without manually gathering information

Account Review

Use Cases: Customer Health Score · Installed Base Dashboard · Stakeholder Mapping & Buying Committee Navigator · Account Growth Planner

Top Pick: AT-05 | Account Growth Planner →

Identifies untapped revenue opportunities within an account using data-driven analysis instead of gut instinct

Contract Execution

Use Cases: RFP/RFI Accelerator · Rebate & Invoice Status Copilot · Multi-BU Deal Orchestration Dashboard · Contract Clause Advisor

Top Pick: CPQ-04 | Contract Clause Advisor →

Flags risky contract terms and recommends negotiation language to reduce manual legal review time

Post Deal & OBR

Use Case: QBR Deck Prep

Top Pick: SP-13 | QBR Deck Prep →

Automatically builds a pitch-ready QBR deck from data so EA leaders stop rebuilding it from scratch every quarter

Expected Benefit — Top 4 Picks

DEA Interviewees expressed a common end state: **less time in spreadsheets**, more time chasing opportunities

Meeting Prep Briefing

Currently spend hours manually pulling data from disconnected systems before customer meetings

Handle more accounts
Show up more informed
Spend meeting time on strategy rather than catch up

Stronger customer relationships and faster deal velocity

Account Growth Planner

Relies heavily on intuition and incomplete data because manual process takes too long

Surfaces untapped revenue within existing accounts
Shift towards proactive growth

Time and attention directed toward highest-value opportunities

Contract Clause Advisor

Legal review and red-lining is one of the most resource-intensive parts of contracting

Reduces burden on legal
Accelerates deal closure
Ensures consistency in negotiations across OUs

Revenue can be recognized sooner, with fewer errors and costly remediation cycles

QBR Deck Prep

Repetitive quarterly process that requires pulling data across OU's and inconsistent formatting

Reclaim roughly 12 days per director per year
Redirect time toward customer conversations

High quality QBR storytelling to strengthen customer relationship and support contract renewal

Key Takeaway

When directors spend less time on administrative work, they spend more time in front of customers — in enterprise medical device sales, customer time is where revenue is won and relationships are protected, adding benefits beyond just efficiency gains

Validated AI User Journey — DEA Sales Process

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SP-04

Meeting Prep Briefing

I have a call in 90 minutes and I need account history / open opps / recent service issues / talking points – from 5 different systems

AT-05

Account Growth Planner

Account planning cycle – I need a data-backed growth plan for my top 10 accounts that I can actually defend

CPQ-04

Contract Clause Advisor

Legal sent back redlines on my on my contract and I don't know which ones I can accept vs. escalate

SP-13

QBR Deck Prep

QBR is next week – I need to pull performance data from 6 systems and build a deck that tells a story

Account Review

"There are multiple platforms with different companies under their own respective platforms which might have different data which is hard to integrate, and information is inconsistent."

— Director, Enterprise Accounts

Account Planning

"AI is probably to the point where we should be able to get high-level summaries of the accounts...AI can help do a lot of the legwork, maybe even do stakeholder mapping... There's a lot of information out there that sometimes we have visibility to because we come across it, and other times we don't."

— Director, Enterprise Accounts

Contract Execution

"It would be great to put AI through redlines to improve the speed of negotiation, so the attorney doesn't have to go line by line through the agreement. AI can level up negotiations across the team."

— Director, Enterprise Accounts

Post-Deal Growth

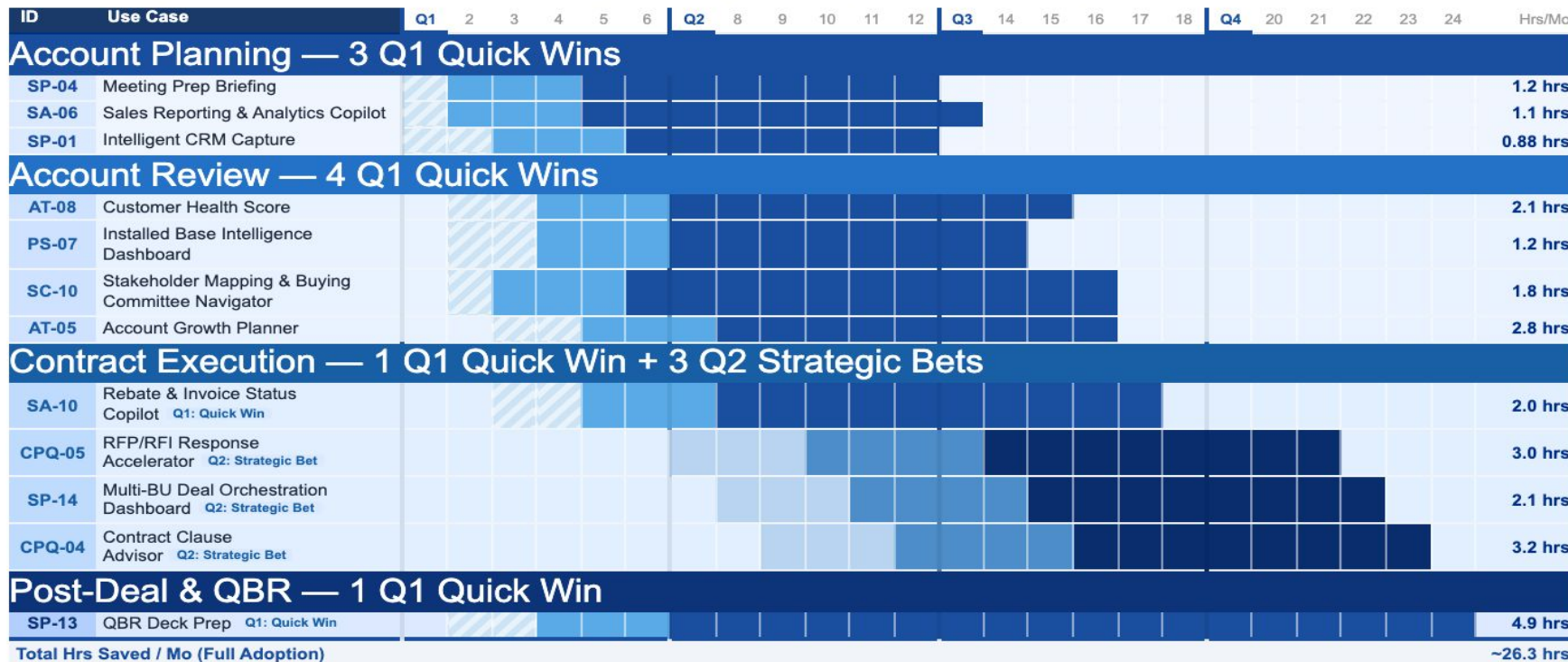
"Informing customer presentations and communications takes time. It would be nice to put all the data into AI and use it to help build a deck, giving more time to work on the customer facing components"

— Director, Enterprise Accounts

Final Insights
**Proposed Implementation Timeline
& Next Steps**

Implementation Timeline — 24-Month Proposal

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Intensity: Prep / ramp-up Active deployment Peak adoption Active — strategic Peak — strategic

~26.3 hrs/mo
total saved per rep · full adoption

Risks & Mitigations

Risks



Change Management & Adoption →

Organizational resistance to AI tools driven by job displacement fears among analysts and sales reps whose core responsibilities overlap with proposed automation



Implementation Sequencing →

Attempting to deploy multiple recommendations simultaneously risks resource overextension, incomplete execution, and erosion of stakeholder confidence if early tools underperform



Executive Sponsorship & Internal Ownership →

Without a designated senior champion within the EA organization, recommendations risk stalling post-delivery



Mitigations

Enhancing Your Team With AI

Reframe all tool rollouts around productivity augmentation rather than role replacement; leverage existing company-wide AI training as a foundation for targeted adoption workshops per team

Build Foundation First

Adopt a phased two-layer rollout → deploy foundational tools first before layering high-ROI applications; establish clear success criteria before advancing to the next phase

Lead From The Top

Identify and engage an EA leadership sponsor during the project and tie the business case directly to metrics they own and are accountable for

Next Research Areas — AI Integration at Scale

1

Data Infrastructure Mapping

What does [Company]'s data infrastructure actually look like underneath the workflows observed?

Every pilot recommendation, identified AI opportunity, and pain point related to data access traces back to the same root cause: nobody has a clear picture of what data exists, where it lives, who can access it, and how clean it is.

2

Company-Wide AI Adoption

Our interview findings surfaced a tension where AI tools were available but underused (Copilot, Salesforce) due to skepticism and slow adoption.

Understanding AI literacy levels, resistance drivers, and change readiness across the organization can improve success and future company-wide AI implementations.

3

Competitive Benchmarking

Competitors like Boston Scientific were mentioned to be ahead of [Company] on contract reporting, rebate processing speed, and sales tooling.

Validating where that gap actually stands, and what competitors are doing differently gives [Company] a clearer sense of urgency and sharper strategic direction.

4

Customer-Side Validation

Every finding in this engagement looked inward, but several of the most compelling AI opportunities are customer experience improvements (real-time rebate visibility, contract performance, faster post-close communication).

A structured set of conversations with key IDN contact would confirm whether internal pain maps to external frustration.

Q&A

Appendix — High-Value Pain Points

We identified **critical** and **high priority** pain points based on the frequency mentioned across **15 conducted interviews**, then chose the **top 3 critical pain points** for deeper analysis and targeting for potential AI integration opportunities

Account Review		Account Planning		Contract Execution & RFP		Post-Deal Growth & QBR	
Fragmented data sources & manual aggregation	12/15	Manual stakeholder & account mapping	11/15	Contract handoff errors & redundancy	11/15	Rebate tracking is entirely manual	11/15
Static & delayed reporting from analysts	10/15	Multi-stakeholder coordination delays	10/15	RFP data gathering is slow & error-prone	10/15	No contract performance dashboard	10/15
Manual forecasting reliant on memory	8/15	No unified CRM across EA and OU teams	9/15	Manual redlining & inconsistent negotiation	9/15	Quarter-end process is manual & reactive	10/15
No competitive benchmarking at point of need	7/15	Manual deck & presentation building	8/15	Pricing exceptions & approvals are laborious	7/15	Pricing discrepancies & invoice errors	9/15
No contract expiration monitoring	5/15	Knowledge loss from personnel turnover	6/15	Fragmented contract terms across OUs	7/15	QBR preparation is time-consuming	7/15
				No compliance tier visibility	6/15	Contract announcement delays post-close	5/15

Pain Point Prioritization:



Critical – 9+ Interviews



High – 5-8 Interviews



Medium – 2-4 Interviews

Appendix — Additional Interview Quotes

“For example, he has **17 RFPs** going on right now at this exact moment...**how can we expect him to do that?** And still be. thorough, not make mistakes, and be timely.”

“The Rebates team is going to pull \$700,000 in rebates out of your number two days before the end of the quarter...**we had no visibility to it. Nothing was communicated.**”

“**5-10% of sales journey is obtaining data**, bottom of priority list which is why it would be good to integrate AI”

“I want to have **more time dedicated to pushing to customers** rather than doing manual work like creating dashboards, identifying data points, or going through logistical processes like contracts”

“There is no easy dashboard or way to view contract performance insights, or to currently track or measure performance reports on growth... **customers tell us we are behind on this process.**”

“I would love an AI soundboard of what we are seeing from the data itself and be able to extract my own opinions from the generated summary—I have been in scenarios where I’ve gotten back documents with wrong or missing information... **\$14M almost lost from a financial calculation error.**”

“**Pretty much all of it is frustrating.** The gap exists with how many contracts, opportunities, and RFP’s there are.”

“My end goal is to **unburden time doing data analysis** to spend more time chasing opportunities with the customer.”

**note: quotes may be paraphrased, shortened, or reworded for better readability and clarity*

Appendix — Additional Interview Quotes

Interview insights and pain points that surfaced a tension in relation to company-wide AI adoption

"I currently use AI (**Copilot, primarily, [Company] GPT, Snowflake**) to record and take notes for meetings, flag different emails with google calendar, cross check or analyze large data files."

"It would be nice to see an active project (tool) beyond like a Salesforce, which is super difficult to use to track opportunities. I mostly use **Copilot or ChatGPT** for personal use, but would like to use AI agents more to help with mundane tasks or improving workflows."

"Counterparts have been apprehensive to use AI. I use **Copilot** for summarizing meetings, analysis, customer search, competitive products search, meeting debriefs, and goals."

"**I don't currently use** any AI tools in my day-to-day, but I probably should. I've seen examples of colleagues using AI for different applications and how it helps them which is good to see."

"There are **no specific AI tools** for the problems I addressed. I feel like **[Company]'s** Ai implementation has been limited. **Copilot and ChatGPT** is available, but I believe that communication to customers is the extent to which these current tools can be used."

"We are still saving PDFs and excel sheets, I want something more shared through some cloud-based platform. We need a **modernized approach** to contract management, and a better way for storing PDF files."

"I use AI mostly on the language side to help build messaging/models, but the **biggest opportunity is on the data side**. We need AI to help understand and create awareness for opportunities to help with prioritization."

**note: quotes may be paraphrased, shortened, or reworded for better readability and clarity*