

Top 36 AI Value Creation Plays

Aggregated from the AI plays OneGuide is seeing across the PE and VC firms we support, and from our network of 200+ consultants.

10 Plays

→ Drive Revenue

7 Plays

→ Drive
EBITDA

6 Plays

→ Prevent Value Leakage
& Downside Risk

9 Plays

→ Drive Employee
Productivity

4 Plays

→ Evolve Software
for the AI Age

Top 36 AI Value Creation Plays

→ Drive Revenue

AI plays that drive revenue by generating leads, accelerating conversion, and unlocking new monetization opportunities.

- 1 TAM mapping, list building & contact enrichment
- 2 Outbound sales outreach & sequence automation
- 3 Inbound routing, qualification & speed-to-lead optimization
- 4 Paid media campaign building, targeting, optimization & testing
- 5 SEO & generative engine optimization (GEO)
- 6 Marketing content creation & personalization
- 7 Revenue intelligence & forecasting
- 8 Upsell & cross-sell opportunity identification
- 9 Pricing & monetization of AI products/features
- 10 Ecosystem-led sales & partnership enablement

→ Drive EBITDA

AI plays that drive EBITDA by cutting costs and headcount, automating workflows, and finding hidden margin.

- 11 Custom workflow automation for headcount reduction / reallocation
- 12 Customer support automation & deflection
- 13 Accounts payable automation & spend control
- 14 Procurement optimization & vendor cost reduction
- 15 Workforce planning & labor optimization
- 16 Inventory optimization & working capital reduction
- 17 Pricing optimization for margin across SKUs

→ Prevent Value Leakage & Downside Risk

AI plays that protect revenue, reduce risk, and ensure the business fully captures value.

- 18 Customer health monitoring for churn prediction & prevention
- 19 Revenue leakage detection & recovery
- 20 Fraud, abuse & anomaly detection
- 21 Contract & compliance monitoring
- 22 Cybersecurity & threat detection
- 23 AI governance & vendor risk management

→ Drive Employee Productivity

AI plays that drive productivity by speeding up routine tasks, accelerating decisions, and making more employees perform like A-players.

- 24 Company AI adoption, fluency training, & change management
- 25 Personal AI chief of staff & executive productivity
- 26 Self-serve analytics & real-time KPI access
- 27 AI-assisted project & program management
- 28 Call intelligence, during-meeting guidance & rep coaching
- 29 Code generation, review & documentation
- 30 AI in Excel & spreadsheet automation
- 31 Job spec creation & candidate screening
- 32 Function-specific workflow transformation

→ Evolve Software for the AI Age

Plays that embed AI into the product, re-architect systems and data, and enable agents.

- 33 Modernize data & architecture for AI
- 34 Make proprietary data usable & defensible for AI applications
- 35 Rebuild the product experience around AI
- 36 Position the product for agent ecosystems

The OneGuide Network has single-shingle and boutique consultants to help run all of these plays.

For more info, email sales@askoneguide.com.

Drive Revenue

1. TAM Mapping, List Building & Contact Enrichment

The Play:

Using AI to define your total addressable market, generate targeted prospect lists from scratch, segment your target market, and automatically enrich contact records with accurate firmographic and demographic data. With AI, TAM can be mapped via search, social, and AI platforms (through expressed user interest, topical volume, etc.).

Who's it for:

B2B Sales, Marketing, and RevOps teams

What's changed:

AI compresses what used to take days of manual research or expensive data vendors into minutes. Teams using AI can continuously refine their TAM, build highly targeted lists, and keep data fresh.

TIP FROM OUR EXPERT NETWORK

Use TAM cycling as an ongoing process; rather than one-time targeting, you refresh your Clay table on a defined interval (weekly or monthly), re-score every contact, and surface the top-tier contacts to reps for that cycle.

— AI Outbound Expert,
Smartlead and Clay Partner

Relevant Tools



2. Outbound Sales Outreach & Sequence Automation

The Play:

Building AI-powered, multi-touch outbound campaigns that personalize messaging at scale; combining email, LinkedIn, and phone touchpoints with AI-generated copy that adapts to each prospect's role, company context, and real-time signals.

Who's it for:

B2B Sales, Business Development, and RevOps teams

What's changed:

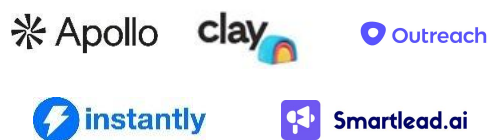
AI has collapsed the gap between a lean team and a full SDR function. Reply rates have gone down, so teams need both scale and personalization. AI can research prospects, write personalized first lines, and run multi-touch sequences automatically. A single operator can run outbound at a scale that used to require a team.

TIP FROM OUR EXPERT NETWORK

More AI targeting outperforms more AI personalization in most campaigns. The insight is in the segmentation, not the writing. Teams that nail the targeting layer and write plain, one-to-one emails consistently outperform teams with sophisticated AI copy and generic lists.

— Cold Outbound Expert
sending millions of emails per month

Relevant Tools



Drive Revenue

3. Inbound Routing, Qualification & Speed-to-Lead Optimization

The Play:

Using AI to instantly score and route inbound leads based on fit, intent, and urgency, reducing response time from hours to seconds and ensuring the right rep gets the lead before the prospect goes cold.

Who's it for:

RevOps, Sales, Marketing, and SDR leaders at companies with high inbound volume

What's changed:

AI has eliminated the lag that used to define inbound response, routing and qualifying leads in real time based on fit, intent, and urgency before a human ever gets involved. Teams with AI-powered routing act on inbound signals the moment they arrive, while others lose deals to slower competitors in the window between form fill and first contact.

TIP FROM OUR EXPERT NETWORK

Speed-to-lead is still one of the highest-leverage variables in conversion. AI lets you act on that insight at scale by routing in real time rather than waiting for a human to triage.

— AI Outbound Expert,
Smartlead and Clay Partner

Relevant Tools



4. Paid Media Campaign Building, Targeting, Optimization & Testing

The Play:

Using AI to build, launch, and continuously optimize paid media campaigns across Google, Meta, and LinkedIn, including automated creative testing, bid management, and audience segmentation.

Who's it for:

Performance marketing and demand gen teams at companies with active paid media budgets

What's changed:

AI has made real-time bid management, audience segmentation, and creative testing accessible to lean teams that previously required agency support or dedicated specialists. Teams running AI-powered paid media can test 10x more creative variants, adjust bids continuously, and surface what's working in hours rather than weeks.

TIP FROM OUR EXPERT NETWORK

Try AI Max in Google Ads: giving Google's AI more signals and more room to operate can unlock double-digit ROAS gains without adding operational complexity. **The simplest move is to turn on the one-click AI Max setting built to find incremental demand inside Search.**

— Paid Ads Expert,
worked with Disney, Lyft, Amazon

Relevant Tools



Drive Revenue

5. SEO & Generative Engine Optimization (GEO)

The Play:

Using AI to scale content production, optimize existing pages for search, and adapt strategies for generative AI answer engines like ChatGPT, Claude, and Perplexity, where buyers are increasingly looking and the rules of discoverability are being rewritten. LLMs are increasingly making recommendations, not just serving links, and informing buying decisions before prospects ever hit a company's site.

Who's it for:

Marketing teams at companies where search matters

What's changed:

AI now writes, audits, and optimizes content at a pace no human team can match. Additionally, GEO has introduced an entirely new discoverability layer where users get not just listings, but recommendations.

TIP FROM OUR EXPERT NETWORK

GEO is about becoming part of the conversation picked up by a generative search engine. **Being included early in a user's conversation with an AI system is key:** each session typically starts broad and narrows down. If you're not present in the early stages, the chances of appearing later decrease significantly.

— AEO/GEO Expert

Relevant Tools

 Profound  SEMRUSH  SURFER

 ChatGPT

 Claude

6. Marketing Content Creation & Personalization

The Play:

Using AI to generate, localize, and personalize marketing content at scale, from landing pages and email campaigns to case studies and sales enablement materials, without proportionally scaling the marketing team.

Who's it for:

Marketing, content, and demand gen teams

What's changed:

AI has made content personalization economically viable at a scale that previously required enterprise-level budgets or large content teams. Marketing teams using AI can produce persona-specific messaging, localized landing pages, and tailored nurture sequences without proportionally scaling headcount.

TIP FROM OUR EXPERT NETWORK

Upload all relevant company assets as context. Include your website content, marketing collateral, and any non-proprietary materials. If you're a sales rep, upload emails you've personally written so the AI can mimic your specific writing style.

— GTM Content Expert

Relevant Tools

WRITER  HubSpot  jasper

 [PERSADO]  copy.ai  Claude

Drive Revenue

7. Revenue Intelligence & Forecasting

The Play:

Using AI to improve forecast accuracy, attribute revenue to the right channels, inspect pipeline health, and plan territory and quota allocation, replacing spreadsheet-driven guesswork with data-driven insight.

Who's it for:

Sales, RevOps, and Finance leaders

What's changed:

AI has replaced the spreadsheet-driven forecast with a continuously updated model that ingests CRM data, call recordings, email engagement, and historical patterns to produce risk-adjusted pipeline views in real time. AI-powered revenue intelligence closes the gap between what reps report and what closes, giving leadership a defensible forecast.

TIP FROM OUR EXPERT NETWORK

AI can analyze call transcripts to flag and re-rate deals that are at risk according to signals from meetings.

This can lead to more accurate forecasts and live intelligence on deals that need saving.

— AI in RevOps Expert

Relevant Tools



einstein



8. Upsell & Cross-Sell Opportunity Identification

The Play:

Using AI to surface expansion opportunities within the existing customer base by analyzing usage patterns, contract data, and engagement signals to identify which customers are ready to buy.

Who's it for:

Customer Success, Account Management, and RevOps teams

What's changed:

AI has made expansion revenue proactive, surfacing customers ready to buy more before a CS rep asks. Teams using AI can score the entire customer base for expansion signals based on CRM, product, and contract data continuously.

TIP FROM OUR EXPERT NETWORK

Track data around **deal context** (e.g. size, stage, owner, and forecasted amount), **CSM context** (executive summary, risk factors, closed lost/won reasons, and reasons for purchase) and **customer health** (score and usage), to surface opportunities.

— 2x CS Leader and Strategist

Relevant Tools



Drive Revenue

9. Pricing & Monetization of AI Products/Features

The Play:

Optimizing pricing models for AI-powered products and features, including usage-based pricing, value metric selection, and willingness-to-pay research at scale.

Who's it for:

Product, strategy, and finance teams at software and AI-native companies building AI features

What's changed:

AI products deliver value in proportion to how much they are used and how well they work, not how many users they have. A per-seat model almost always leaves money on the table. The teams that figure it out build advantages in expansion revenue, feature attach rates, and gross margin that compound over time.

TIP FROM OUR EXPERT NETWORK

Willingness-to-pay, not the marginal cost of AI, should be the most important factor in your pricing strategy. SaaS companies are overreacting to margin compression and switching to cost-plus pricing, which creates a less efficient strategy. Price to the value you deliver, not to what it costs you to deliver it.

— AI Monetization Expert,
ex-Simon-Kucher

Relevant Tools



10. Ecosystem-Led Sales & Partnership Enablement

The Play:

Using AI to identify and onboard partners, systematically mine your partner ecosystem for warm introductions, account overlap, and buying signals, and orchestrate co-sell motions at scale instead of relying on ad hoc partner manager relationships.

Who's it for:

B2B Sales, Partnerships, and RevOps teams at companies with partner ecosystems or channel networks

What's changed:

The partner motion has historically been bottlenecked by manual partner manager bandwidth. AI now automates account overlap analysis across CRMs, surfaces warm-intro paths through LinkedIn and partner data, and triggers co-sell plays based on real-time signals.

TIP FROM OUR EXPERT NETWORK

Use cases include partner acquisition research, joint value proposition development, market analysis, and business planning for new partnerships. More sophisticated teams are building agentic workflows that chain these tasks together and operationalize insights that used to require significant manual work.

— Partnership Advisory Leader

Relevant Tools



Drive EBITDA

11. Custom Workflow Automation to Enable Headcount Reduction/Reallocation

The Play:

Using AI to automate repetitive workflows that currently require human labor, enabling headcount reduction, reallocation, or avoidance as the business scales.

Who’s it for:

Business unit leaders with high-volume manual workflows

Relevant Tools

What’s changed:

AI has made it viable to automate high-volume workflows that previously required human judgment to navigate exceptions and edge cases. Operations teams using AI are reallocating headcount from process execution to process design, while others are hiring into functions that will be automated within 12 to 18 months.

Workflow Automation examples across industries:

Business Services	• BPO workflow automation • Report and deliverable drafting • Timesheet and utilization tracking • Billing reconciliation
Healthcare	• Prior authorization processing and status tracking • Medical coding and charge capture • Clinical documentation and ambient note-taking • Claims denial management and resubmission • Patient scheduling, reminders, and intake automation • Benefits verification and eligibility checks
Software	• Cloud and infrastructure cost optimization • Customer onboarding workflows (setup, configuration, data migration)
Manufacturing & Industrials	• Purchase order and procurement workflow automation • Production scheduling and capacity planning • Inventory reconciliation across ERP and shop-floor systems
Consumer Products & Services	• Order processing exception handling (fraud flags, shipping issues, cancellations) • Demand forecasting and inventory replenishment planning

Drive EBITDA

12. Customer Support Automation & Deflection

The Play:

Using AI to resolve customer inquiries automatically through intelligent chatbots and self-serve tools, deflecting tickets that would otherwise require human agents without degrading customer satisfaction.

Who's it for:

CS, support, and ops leaders at companies with high inbound support volume

What's changed:

AI has raised the ceiling on what self-serve support can resolve, moving well beyond FAQ bots into agents capable of handling complex, multi-step inquiries without escalation. Support teams with AI deflection handle significantly more volume at lower cost per ticket, while others scale support headcount in line with customer growth.

TIP FROM OUR EXPERT NETWORK

Implement an external classification model to augment your tool's built-in AI triage. This improves efficiency at scale, as correct categorization reduces time to resolution and keeps your most important customers happy.

— Post-Sales Expert,
ex-Digitas and Vistaprint

Relevant Tools



zendesk



Agentforce

kustomer



INTERCOM



Fin



Claude

13. Accounts Payable Automation & Spend Control

The Play:

Using AI to automate invoice processing, catch duplicates, enforce approval workflows, and surface anomalies in vendor spend, reducing AP headcount and leakage simultaneously.

Who's it for:

Finance, accounting, and procurement teams processing high invoice volumes

What's changed:

AI has transformed AP from a data entry and reconciliation function into an intelligent control layer that catches duplicates, flags anomalies, and enforces policy before invoices are approved. Finance teams using AI reduce error rates, cut processing costs, and surface spend patterns that would be invisible in manual workflows.

TIP FROM OUR EXPERT NETWORK

For processes like AR/AP coding, it is best practice to provide the AI with rule-based guidance for enforcing workflows, because AP/AR requires deterministic outcomes, whereas AI without this guidance will give probabilistic answers.

— AI in Finance Implementation Partner

Relevant Tools



coupa



SAP Concur



ramp



bill.com



Brex



Claude

Drive EBITDA

14. Procurement Optimization & Vendor Cost Reduction

The Play:

Using AI to analyze vendor contracts, benchmark pricing, identify consolidation opportunities, and surface negotiating leverage across the supplier base to reduce input costs without disrupting operations.

Who’s it for:

Procurement, supply chain, and CFO teams at companies with significant external spend

What’s changed:

AI has made it possible to analyze vendor contracts, benchmark pricing, and identify consolidation opportunities across a large supplier base in hours rather than quarters. Procurement teams using AI find savings that would never surface in manual reviews and negotiate from a position of data-backed leverage.

TIP FROM OUR EXPERT NETWORK

Look beyond unit pricing to all relevant costs like shipping, payment terms, rework, etc. Figure out all the relevant costs, and then do an assessment based on that holistic view of total cost of ownership.

— Sourcing & Procurement Expert who’s helped 100+ companies

Relevant Tools



15. Workforce Planning & Labor Optimization

The Play:

Using AI to optimize staffing, skills mapping, and headcount planning across functions, matching labor supply to demand more precisely and reducing overstaffing, overtime, and attrition costs.

Who’s it for:

HR/People, Operations, and Finance leaders

What’s changed:

AI has replaced headcount spreadsheets with dynamic models that incorporate demand signals, skills data, attrition risk, and scenario planning in real time. Leaders using AI-powered workforce planning make staffing decisions based on actual demand patterns rather than historical ratios and institutional memory.

TIP FROM OUR EXPERT NETWORK

Use AI to create a dynamically updating current, 30, 60, and 90 day snapshot of your organization; this can typically be done using the data found in your HRIS and ATS.

— Data-driven Headcount Planning Advisor

Relevant Tools



Drive EBITDA

16. Inventory Optimization & Working Capital Reduction

The Play:

Using AI to improve demand forecasting, reduce excess inventory, optimize reorder points, and free up working capital trapped in stock, without increasing stockout risk.

Who's it for:

Supply chain, operations, and finance leaders at industrial and CPG businesses

What's changed:

AI has made demand forecasting continuous and multi-variable, incorporating weather, promotions, supplier lead times, and market signals that manual planning cycles miss entirely. Supply chain teams using AI hold less inventory, experience fewer stockouts, and free up working capital that was previously locked in safety stock.

TIP FROM OUR EXPERT NETWORK

AI is particularly effective at identifying hidden correlations between external variables and demand. Statistical analysis has historically been used to identify these correlations, but AI systems identify them faster, across more variables, and with greater precision.

— Supply Chain and Logistics Advisor,
ex-Vizient

Relevant Tools

NETSTOCK

RELEX

ORACLE

inventoro

KINAXIS

Claude

17. Pricing Optimization for Margin across SKUs

The Play:

Using AI to set and dynamically adjust prices across large SKU catalogs based on demand signals, competitive pricing, margin targets, and customer segments, improving gross margin without sacrificing volume.

Who's it for:

Pricing, revenue, and finance leaders at companies managing hundreds or thousands of SKUs

What's changed:

AI has made dynamic pricing across large SKU catalogs operationally feasible, updating prices in response to demand signals, competitive moves, and margin targets without manual review. Pricing teams using AI capture more available margin across their portfolio while maintaining competitive positioning.

TIP FROM OUR EXPERT NETWORK

The first gain is in detection speed for pricing opportunities. An agent monitoring invoice data can flag a pricing deviation in near real time, e.g. margin has declined in the coatings segment in Southern Europe, here is the magnitude, here are the candidate causes.

— AI Advisor for Industrial Companies

Relevant Tools

zilliant

VENDAVO

PROS

pricefx

omniaretail

Claude

Prevent Value Leakage & Downside Risk

18. Customer Health Monitoring for Churn Prediction & Prevention

The Play:

Using AI to continuously monitor product usage, support interactions, engagement signals, and relationship health to identify at-risk accounts before they churn, enabling proactive intervention.

Who's it for:

Customer Success and Account Management teams at subscription or recurring revenue businesses

What's changed:

Customer Success teams have used health scores for years, but most were static, manually maintained, and backward-looking. AI changes this by turning account monitoring into a continuously learning, multi-signal system that can detect subtle churn patterns humans and rules-based scoring models miss.

TIP FROM OUR EXPERT NETWORK

The quality of your preparation directly determines your save rate, and this is determined by speed of risk identification. Most of your time should be spent preparing compelling talk tracks and developing irresistible save plans before the renewal conversation.

— Customer Retention Expert,
2x CS Leader

Relevant Tools



TOTANGO



mixpanel

Amplitude

Gainsight

19. Revenue Leakage Detection & Recovery

The Play:

Using AI to identify missed billing events, unbilled usage, contract non-compliance, and uncaptured revenue buried in claims data and spend patterns.

Who's it for:

Finance and revenue operations teams at subscription, usage-based, or services businesses

What's changed:

AI has made it possible to systematically compare what should have been billed against what actually was, at a scale and frequency no finance team can match manually. Teams using AI find leakage across billing cycles, usage overages, and contract non-compliance that would never surface in standard close processes.

TIP FROM OUR EXPERT NETWORK

Leakage detection can be a core offer part of pre-acquisition diligence. Using diligence data room analysis, **AI can help identify and quantify lost revenue and secure a post-acquisition contract to recover the value.**

— AI Finance Implementation Partner

Relevant Tools



Maxio

conga

chargebee

RightRev

ZUORA

Prevent Value Leakage & Downside Risk

20. Fraud, Abuse & Anomaly Detection

The Play:

Using AI to identify fraudulent payments, refund abuse, vendor overbilling, and anomalous transactions in real time, before they become losses, by learning normal patterns and flagging deviations.

Who's it for:

Finance, risk, and operations teams at companies processing high transaction volumes or managing complex vendor relationships

What's changed:

AI has made real-time fraud detection at scale accessible to companies that previously relied on rule-based filters or retrospective analysis. Teams using AI models detect anomalous patterns across thousands of transactions simultaneously, catching fraud before losses are booked rather than after.

TIP FROM OUR EXPERT NETWORK

The best ways to detect fraud and anomalies are often counterintuitive. For example, one company generated heat maps of how users moved their cursors on the screen. AI analysis of these images detected fraud better than any fancy algorithm or "obvious" set of business rules.

— Applied AI Expert,
Founding Engineer at Clay

Relevant Tools



sift



Kount

stripe

apexanalytix



DATAVISOR

21. Contract & Compliance Monitoring

The Play:

Using AI to monitor vendor and customer contracts for pricing compliance, obligation fulfillment, renewal timing, and regulatory requirements, surfacing issues before they become disputes, penalties, or missed revenue.

Who's it for:

Legal, Procurement, Finance, and Compliance teams managing large contract portfolios

What's changed:

AI has made it feasible to monitor the full contract portfolio continuously. Legal and finance teams using AI know what every contract says, when it expires, and whether obligations are being met across hundreds or thousands of agreements simultaneously.

TIP FROM OUR EXPERT NETWORK

Mandate human spot-checks on anything dollar, date, or termination-related. This can be built into your AI system and given its own UI if needed (though an approval button in your CRM usually works just fine). Otherwise, you'll just trade "we missed a clause" for "we acted on a clause that wasn't there."

— AI in Revenue & Sales Ops Expert,
ex-Dropbox and PandaDoc

Relevant Tools

docusign



Icertis

conga



Evisort



LINKSQUARES

Prevent Value Leakage & Downside Risk

22. Cybersecurity & Threat Detection

The Play:

Using AI to detect threats, anomalous access patterns, and potential breaches in real time across the enterprise, reducing the window of exposure and the cost of incident response.

Who's it for:

IT, security, and risk leaders

What's changed:

AI presents new cyber threats, but it has also compressed threat detection and response times from days to minutes, identifying anomalous behavior across the enterprise before it escalates to a breach. Security teams using AI can monitor the entire environment continuously, correlating signals that would take a human analyst hours to connect.

TIP FROM OUR EXPERT NETWORK

When setting up AI for security scanning, **give it context about your project's goals, past security issues you've encountered, and anticipated future vulnerabilities.** This helps the AI focus on what matters to your environment.

— Expert in AI for Remedying Tech Debt and Vulnerabilities

Relevant Tools



23. AI Governance & Vendor Risk Management

The Play:

Using AI to inventory every third-party AI vendor, embedded model, and AI-enabled feature across your company, then continuously assess each vendor's data handling practices, security posture, and regulatory compliance to enforce third-party AI risk policies.

Who's it for:

Legal, compliance, IT, procurement, and security leaders at companies adopting AI broadly or operating in regulated industries

What's changed:

AI has opened a threat vector: every vendor shipping models, agents, and AI-enabled features expands your data exposure, regulatory surface, and security risk. Often, this happens without disclosure. Companies need to evaluate vendor AI practices at the pace they're being deployed.

TIP FROM OUR EXPERT NETWORK

Portfolio companies already have AI running in their SaaS and employee browsers. **Inventory these systems first; then develop policy.** Skip the inventory step and you're writing rules without a full view of your AI vendor landscape.

— AI Governance & GRC Expert

Relevant Tools



Drive Employee Productivity

24. Company AI Adoption, Fluency Training, & Change Management

The Play:

Building the internal infrastructure, training, and governance to drive real AI adoption across the workforce, moving from individual trailblazing experiments to organization-wide productivity gains.

Who's it for:

People, Operations, and AI transformation leaders at companies serious about enterprise-wide AI

What's changed:

AI adoption has moved from a technology initiative to an organizational change problem, and the companies winning are the ones treating it that way. Leaders who invest in workflow redesign, role-specific training, and clear governance are seeing significant and widespread productivity and adoption gains.

TIP FROM OUR EXPERT NETWORK

The real play at the portfolio level is getting managers to lead AI-enabled teams, not just handing them a tool.

— HR Advisor who's worked with Bridgewater, Magnetar Capital, and Lexington Partners

Relevant Tools



25. Personal AI Chief of Staff & Executive Productivity

The Play:

Using AI as a personal productivity layer for executives and knowledge workers, handling research synthesis, meeting prep, communication drafts, calendar triage, and decision support.

Who's it for:

Executives and high-output employees across functions

What's changed:

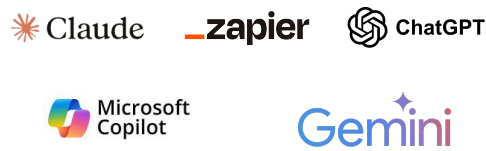
AI has given every executive and knowledge worker access to a force multiplier that handles the research, drafting, and synthesis work that used to sit in a queue or simply not get done. Leaders using AI as a daily productivity layer are making faster, better-prepared decisions while reclaiming hours previously spent on tasks that don't require their judgment.

TIP FROM OUR EXPERT NETWORK

Record yourself describing your role, objectives, tech stack, and pain points. Feed that raw transcript into Claude Code and have it interview you further. It will extract the context from your own words, then generate your initial Claude.md, skills, and folder structure automatically.

— Claude Code and Cowork Expert

Relevant Tools



Drive Employee Productivity

26. Self-Serve Analytics & Real-Time KPI Access

The Play:

Using AI to make business intelligence self-serve, allowing any employee to query data in plain language, surface insights, and build dashboards without waiting for a data analyst.

Who's it for:

Operations, finance, and business unit leaders who need data to make decisions but lack dedicated analyst support

What's changed:

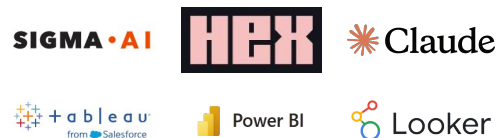
AI has made business intelligence genuinely self-serve, allowing any team member to query data in plain language and get answers without waiting for a data analyst. Analytics is shifting away from the traditional dashboard-centric model, and the role of traditional BI platforms is evolving.

TIP FROM OUR EXPERT NETWORK

Don't wait for a dedicated data hire to start. Tools like Claude Code now let non-data folks handle the basics, building metrics, framing questions, even running causal experiments, without a data person in the org.

— AI Analytics Expert

Relevant Tools



27. AI-Assisted Project & Program Management

The Play:

Using AI to draft project plans, track dependencies, surface risks, generate status updates, and manage stakeholder communication across complex initiatives.

Who's it for:

Project managers, PMOs, and cross-functional team leads managing multi-workstream initiatives

What's changed:

AI has made proactive risk management in complex projects achievable without a dedicated PMO analyst, surfacing dependency risks and status gaps before they cause delays. Project leaders using AI spend less time gathering status and more time resolving the issues the data surfaces.

TIP FROM OUR EXPERT NETWORK

Automate tracking and reduce manual overhead. Instead of project managers manually chasing down 100+ tasks across spreadsheets, use AI to ingest all your data, organize it, flag risks, and generate status updates automatically.

— Project Management and Project Rescue Expert

Relevant Tools



Drive Employee Productivity

28. Call Intelligence, During-Meeting Guidance & Rep Coaching

The Play:

Using AI to analyze sales and customer calls in real time and post-call, delivering coaching feedback, identifying deal risks, surfacing competitor mentions, and guiding reps during live conversations.

Who's it for:

Sales and Business Development leaders

What's changed:

AI has made scalable, individualized sales coaching possible for the first time. Previously, only a small share of calls were reviewed by managers; AI can enable complete visibility into every conversation. Sales teams using AI surface deal risks earlier, coach reps faster, and act on competitive intelligence in the same week it surfaces on calls.

TIP FROM OUR EXPERT NETWORK

Run AI assessments of your sales processes at the company level, not just the individual level. Consolidate all responses under one company entity so you get a unified AI recommendation strategy.

— AI in Sales Expert,
7x Sales Leader

Relevant Tools



29. Code Generation, Review & Documentation

The Play:

Using AI to write, review, and document code, accelerating development cycles, reducing review bottlenecks, and enabling less experienced developers to produce higher-quality output faster.

Who's it for:

Engineering, Technology, and Product teams at software companies

What's changed:

AI has changed the economics of software development by enabling developers to produce higher-quality code faster, spend less time on boilerplate, and document systems that previously had no documentation. Engineering teams using AI move faster through sprint cycles, reduce review bottlenecks, and extend their productive reach.

TIP FROM OUR EXPERT NETWORK

Decomposition and delegation become key skills; **the engineers who get the most out of AI tools are those who can reliably break down large chunks of work into well-scoped, incremental tasks** and then delegate them effectively, whether to a human teammate or an AI agent.

— AI-enabled Engineer

Relevant Tools



Drive Employee Productivity

30. AI in Excel & Spreadsheet Automation

The Play:

Using AI to automate complex spreadsheet tasks, build formulas, clean data, generate analyses, and create financial models faster without manual manipulation or specialized expertise.

Who's it for:

Finance, operations, and business leaders who live in Excel

What's changed:

AI has made spreadsheet work faster and less dependent on specialized Excel expertise, turning complex formula work and data manipulation into tasks any analyst can execute in minutes. Finance and operations teams using AI spend less time building models and more time interpreting them, and catch errors that manual review misses.

TIP FROM OUR EXPERT NETWORK

AI is excellent at playing devil's advocate. After you finish a model (whether AI-assisted or not), run it through an AI tool and ask it to find flaws, hard-coded values, and structural issues. This catches problems you'd miss. But for complex, mission-critical modeling, don't rely on AI to build it end-to-end.

— AI in Excel Trainer

Relevant Tools



ChatGPT



Claude



Numerous.ai



Microsoft Copilot

31. Job Spec Creation & Candidate Screening

The Play:

Using AI to write job descriptions, screen resumes at scale, score candidate fit against role requirements, and surface top candidates faster, reducing time-to-hire and recruiter workload.

Who's it for:

People, HR, and Talent Acquisition leaders and hiring managers

What's changed:

AI has made rapid role opening and high-volume candidate screening viable without proportionally growing the recruiting team. It can score applicants against defined criteria before a recruiter reviews a single resume. Teams using AI reduce time-to-hire, increase consistency in screening standards, and free recruiters to focus on assessment and closing rather than triage.

TIP FROM OUR EXPERT NETWORK

Build an agent to enforce business cases before opening roles. Have managers submit a business case for new roles, the case passes through logic checks, then auto-populates a page shared with FP&A/CPO/CEO and triggers a Slack notification.

— AI in TA Expert,
3x People Leader

Relevant Tools

Ashby

hirevue

greenhouse



Claude

LinkedIn
RECRUITER



Findem

Drive Employee Productivity

32. Function-Specific Workflow Transformation

The Play:

Using AI tools and building AI workflows tailored to each function to help every employee multiply their current output by automating the lower-value portions of their role and accelerating the high-value ones.

Who’s it for:

Functional leaders

What’s changed:

AI has made it possible to systematically raise output across every function without adding headcount, by automating the repetitive, document-heavy work that consumes most workers' time. Teams that have deployed function-specific AI tools are producing more with the same headcount, while others are hiring to fill capacity that AI has already made available.

Productivity use cases by function:

Sales	• CRM hygiene and data entry • Proposal drafting • Deal prep and pre-call research • Competitive battlecards • Partner onboarding workflows
Customer Success	• Meeting prep and QBR deck creation • Health score monitoring • Renewal risk flagging • EBR summaries
Marketing	• Marketing ops automation • Performance reporting • Campaign brief generation • Content repurposing
Finance	• Automated variance commentary • Management reporting • Audit prep • Budget vs. actual analysis
Technology / Product	• Documentation • PRD drafting • Test case generation • Sprint planning • Code review summaries
People / HR	• HR chatbot for policy questions • Performance review drafting • Job spec creation • Onboarding workflows

Evolve Software for the AI Age

33. Modernize Data & Architecture for AI

The Play:

Assessing and rebuilding data infrastructure, including vector databases, hybrid search, and real-time data pipelines, to make it AI-ready, ensuring AI applications have the data quality and accessibility they need to perform.

Who's it for:

CTOs, data engineering, and platform leaders building AI-powered workflows

What's changed:

AI application performance depends heavily on data quality and structure. Most companies build AI features on infrastructure that was never designed for it. Teams that have invested in AI-ready data architecture ship features faster, see fewer hallucinations in production, and can iterate on model behavior without rebuilding the plumbing.

TIP FROM OUR EXPERT NETWORK

Start with vanilla data infrastructure, then enrich as needed. Pump data through a basic LLM call first to see what you get, then layer in vector embeddings and evals only where response quality demands it.

— AI Architecture Expert

Relevant Tools



34. Make Proprietary Data Usable & Defensible for AI Applications

The Play:

Structuring, labeling, and securing proprietary data assets to become the core competitive moat for AI products, ensuring they cannot be easily replicated by competitors relying on third-party models alone.

Who's it for:

Product, data science, analytics, and strategy leaders

What's changed:

AI has elevated proprietary data from a business asset to a product moat, but only for companies that have invested in making it structured, labeled, and accessible to models. Teams that have done this work build AI features that competitors using third-party models alone cannot replicate, and position themselves for success as the AI transition continues.

TIP FROM OUR EXPERT NETWORK

Keep it simple: basic file formats often work best with AI. For example, consider taking complex database records and turning them into text files that frame the data points in a narrative. Agents are great at using pure text. Agent harnesses like Claude Code are optimized for efficient search and context assembly across text like this.

— Applied AI Developer

Relevant Tools



Evolve Software for the AI Age

35. Rebuild the Product Experience Around AI

The Play:

Redesigning core product workflows around AI, embedding copilots, agentic automation, and dynamic outputs that replace or augment manual user actions rather than bolting AI onto existing interfaces.

Who’s it for:

Product, design, and engineering leaders

What’s changed:

AI has raised user expectations for what software should do automatically, creating a widening gap between products that eliminate manual steps and products that have simply added an AI button. Product teams rebuilding core workflows around AI are compressing user effort on high-frequency tasks and differentiating from incumbents who are layering AI onto legacy UX.

TIP FROM OUR EXPERT NETWORK

The biggest mistake in AI product design is treating AI as a feature to add rather than a new paradigm to design around. The best redesigns start with: if a user never had to do this step manually, what would the experience look like?

— AI Design Expert

Relevant Tools



36. Position the Product for Agent Ecosystems

The Play:

Building APIs, MCP servers, and interoperability layers that allow your product to participate in agent-driven workflows, where AI systems orchestrate actions across tools on behalf of users.

Who’s it for:

CTOs and platform leaders at technology companies

What’s changed:

As AI agents become more common, users are looking to build multi-step workflows across tools without direct human input. The products built to participate in those workflows have a distribution advantage that compounds as agent usage grows. Teams investing in MCP servers and agent-ready APIs today are building toward a future where their product is critical infrastructure for AI systems, not just used by humans.

TIP FROM OUR EXPERT NETWORK

Whether using MCP, API, or CLI, help the agent discover the product and use it correctly. Every fetch or tool call must include instructions that tell the agent how to use the tool and how to recover from error states. This often means building new agent-friendly endpoints or commands that provide lists of resources and verbose explanations to the agent.

— Applied AI Expert

Relevant Tools

