Category

Commercial Excellence

Digital & AI-Enabled Commercial Transformation Playbook

A staged maturity model and use-case prioritization method for embedding AI and digital tools into the commercial engine without disrupting the number the business runs on.

- Executive
- Advanced
- Template Included

- Mithun A. Sridharan

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Overview

A practical roadmap for AI-enabled commercial transformation: a maturity model, an impact-versus-feasibility use-case matrix, and a rollout sequence that avoids the pilot-purgatory most AI sales initiatives get stuck in.

Where should we start if we haven't done any AI initiatives yet?

Start with the data readiness audit, not a tool evaluation. Most organizations discover the highest-leverage first move is actually a CRM hygiene project, which sounds unglamorous but is the prerequisite that determines whether any subsequent AI use case can succeed.

How do we choose between building custom AI capability and buying a vendor tool?

For most commercial use cases, buying is the right default — the data and integration work is the hard part, not the model itself, and few commercial organizations have a durable reason to own that infrastructure. Consider building only for a genuinely differentiating use case tied to proprietary data no vendor tool can access.

What's a realistic pilot length?

Ninety days is a practical default — long enough to see a real trend in the target metric, short enough to keep organizational attention and to kill it quickly if it's not working. Extend only with a specific, agreed reason, not because the result was ambiguous and no one wants to make the call.

How do we know if a use case is ready for Stage 3 (Augmented) versus stuck at Stage 2 (Assisted)?

Move to Stage 3 only once Stage 2 has run long enough to show the AI's suggestions are consistently accurate and trusted by the humans using them — usually evidenced by high acceptance rates of its recommendations. Moving to draft-and-approve before that trust is established just adds review friction without saving real time.

How do we handle rep concerns that AI tools are being used to monitor or replace them?

Address it directly and early, before the pilot launches — explain specifically what the tool does and doesn't decide, and who does and doesn't see its outputs. Silence on this question is what generates the workaround behavior that quietly kills adoption, far more than the technology itself.

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Author

Mithun A. Sridharan Thought Leader

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