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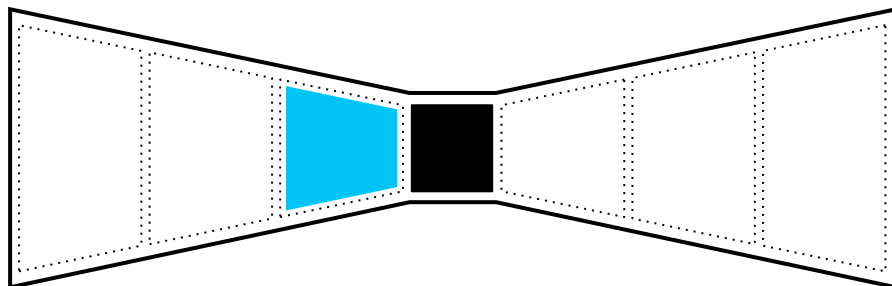
YOUR NEXT SOLUTION ENGINEER MAY BE AI - AND THAT'S A GOOD THING

HOW AI IS MASTERING TECHNICAL ASPECTS OF SELLING

By John Grispon, Revenue Architect at Winning by Design

Your Next Solution Engineer May Be AI - and That's a Good Thing: How AI is Mastering Technical Aspects of Selling

By John Grispon, Revenue Architect at Winning by Design

Research conducted Q2 2025

Research Abstract

As complex B2B sales demand faster and more scalable technical support, AI is stepping in to bridge the gap. This report uncovers how AI-driven presales solution engineering tools are both augmenting and replacing human teams.

CEO Take

Sales reps don't need to be solution engineers (SEs), but now every rep can operate like they have a technical expert in the room. That's the promise of AI presales SEs. Whereas GTM teams have typically been staffed with only one SE for every four Account Executives (AE), this limitation is lifting with the advent of AI. Today's AI presales SE solutions are viewed as assistants rather than replacements for human SEs, but as AI solutions become more capable, they will take over more routine tasks. This allows AEs and SEs to redirect their energy toward multithreading, solution design, stakeholder management, and relationship-building.

Today's AI SEs can assist human SEs with filling out RFPs, answering technical questions, and designing draft solutions for complex problems. This allows a single SE to do the work of many. And in the very near future, AI SEs will perform tasks independently—in direct support of AEs—enabling sellers to avoid the painful "can I get back to you on that?" delay.

AI presales SE solutions are ready to deploy across enterprise and mid-market segments spanning most industries. SaaS, technology, and IT Services are the most prevalent adopters today, while early adoption in regulated industries like healthcare and financial services is increasing. If you are a CEO of a SaaS company between $20M and $500M in revenue, we recommend an immediate initial launch of AI within your SE group. This will leverage your current motion, allowing SEs to support more deals with greater accuracy. It will also set you up to take advantage of advances as they develop. We expect AI Solution Engineering to be one of the most aggressive frontiers for agentic go-to-market over the next two years.

Strategic Insights

AI Presales SEs: Catalysts for Scalable Growth

Go-to-market (GTM) leaders are embracing AI presales SE technology not simply for efficiency, but also for growth. Adding technical expertise to more sales cycles increases win rates, and responding more quickly to technical inquiries speeds up sales cycles. Each of these levers—higher win rates and faster sales cycles—contributes substantially to overall growth, both in new customer acquisition as well as expansion opportunities.[1]

Scaling Technical Expertise Across More Deals

In enterprise and mid-market SaaS companies, presales teams are inundated with technical inquiries, solution design work, and administrative follow-ups. AI SEs augment human teams by taking on repeatable, time-consuming tasks—auto-answering product questions or drafting the initial solution design—allowing human SEs to focus on strategic engagement and complex solutioning. This unlocks the ability to support more opportunities without compromising quality.

Studies show presales engineers spend a significant portion of their time on manual activities.[2] AI solutions help SEs reclaim that time, multiplying capacity and enabling broader deal coverage without requiring linear team expansion.[3]

Accelerating Every Stage of the Sales Cycle

AI SEs reduce friction in presales workflows—whether in technical discovery, validation, or proposal development. By automating key moments and surfacing data-driven recommendations, they enable teams to move faster and more decisively. Customers integrating AI into presales are seeing meaningful gains in both pipeline velocity and conversion rates.[4]

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[1] Internal industry interviews and vendor product documentation on AI SE automation use cases, Vivun, State of PreSales Benchmark Report

[2] McKinsey & Company, "The State of AI in 2023," which notes over 50% of SE time spent on repeatable tasks

[3] Vivun, The State of PreSales Benchmark Report

[4] Vendor provided data (Docket, Vivun, HeySam)

Data from multiple sources support this trend, with AI adopters in presales reporting 15–30% reductions in average sales cycle time.[5] One survey found 86% of presales teams now integrating AI (45% using it daily) to drive gains. Speed-to-first-impact is quickly becoming a new competitive norm.[6]

Small gains in presales productivity compound across the sales process. AI SEs reduce time spent on achieving the "technical win," enabling faster deal cycles and giving SEs time back for more strategic efforts.
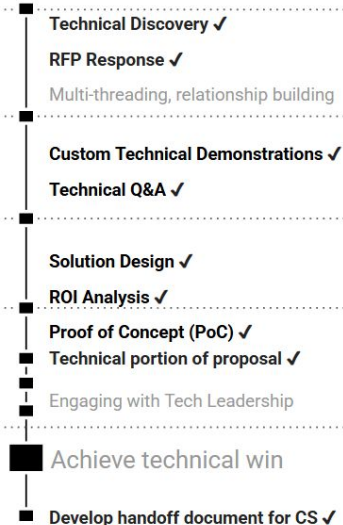
Sales Process
Example process based on 5 stages with 12 meetings.
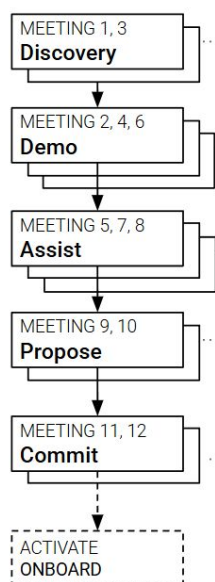
SE Role per Stage
Getting the "technical win" is a deep effort. The AI SE can reduce time spent on many common activities (**bold**)*

Sales Process	SE Role per Stage
MEETING 1, 3 — **Discovery**	Technical Discovery ✓ / RFP Response ✓ / Multi-threading, relationship building
MEETING 2, 4, 6 — **Demo**	Custom Technical Demonstrations ✓ / Technical Q&A ✓
MEETING 5, 7, 8 — **Assist**	Solution Design ✓ / ROI Analysis ✓
MEETING 9, 10 — **Propose**	Proof of Concept (PoC) ✓ / Technical portion of proposal ✓ / Engaging with Tech Leadership
MEETING 11, 12 — **Commit**	Achieve technical win
ACTIVATE ONBOARD	Develop handoff document for CS ✓

*Does not include prep or follow up time

A marginal improvement across multiple meetings causes a disproportionate outcome.

AI SEs help reduce the burden of technical validation, shortening cycle times, and free up time for relationship development and broader account coverage.

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[5] Consensus, Docket, Vivun

[6] The State of PreSales 2024 Report: AI Edition

Improve Win Rates Through Precision and Alignment

AI SEs empower sales teams to deliver more precise and aligned solutions by generating deeper discovery insights and producing prospect-specific recommendations. This leads to better solution fit, stronger impact delivery, and greater buyer confidence[7]—key contributors to improved win rates. In the long run, a stronger fit will[1] boost retention rates.

Early adopters have reported faster solution design cycles (reduced by up to 40%) and enhanced technical alignment with key stakeholders, resulting in measurable deal velocity gains.[8]

Ensure Consistency at Scale

One of the most significant advantages of AI SEs is their ability to deliver consistent, high-quality outputs across every engagement. Whether generating ROI analyses, technical summaries, or demo narratives, AI SEs maintain accuracy and compliance standards—ensuring every customer interaction meets the bar for professionalism and relevance.

Today's leading AI SE vendor solutions can meaningfully automate 40–60% of presales workflows — especially in repetitive tasks, structured documentation, and discovery support — while preserving trust, precision, and human oversight where it matters most.[9]

Empower Agility and Innovation

With routine tasks offloaded, SEs and sellers gain time and bandwidth to be more agile, creative, and consultative. This flexibility is essential in complex sales environments, where quick changes, tailored solutions, and internal collaboration often define success. AI SEs serve as a force multiplier, enabling the human side of sales to thrive where it matters most.

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[8] Vendor provided benchmarks from early adopters (Storylane, Reprise, Vivun SiftHub)

[9] Estimate based on interviews and research performed with 1mind, Docket, HeySam, SiftHub, Storylane, and Vivun.

Category	Before AI SE Adoption	After AI SE Adoption
Technical Coverage	Limited by SE headcount; many deals underserved	Expanded coverage across more deals with fewer bottlenecks
Sales Cycle Duration	Slower cycles due to manual discovery and validation	20-30% faster cycles via automation of core presales tasks
Win Rate Performance	Inconsistent win rates tied to SE availability and experience	Higher win rates due to faster, better-aligned solutioning
Quality of Deliverables	Variable quality; dependent on individual SE output	Consistently high-quality content generated by AI tools
SE Productivity	SEs overloaded with repetitive tasks and admin work	SEs focused on strategic work, improving impact per deal
Consistency Across Deals	Difficult to maintain standardization at scale	Standardized proposals, ROI models, and messaging
Scalability of Presales Effort	Linear scaling tied to human resource growth	Scalable infrastructure supporting nonlinear growth

Key Drivers: Scarcity & Cost

Solutions have emerged because the SE role is essential to complex selling but remains expensive and scarce. The average SE salary in the US today ranges between $150K - $230K.[10] Sales and presales teams grapple with a number of related challenges:

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[10] Glassdoor. Salary estimate is for large SaaS/cloud platform companies . OTE can be $220K - $450K (base + commission/bonus + equity).

- Typical AE-to-SE ratios average around 4:1, putting SEs in high demand, often causing delays and longer sales cycles. Ratios are even higher in mid-market segments, or where resources are scarce.[11]

- Managing numerous opportunities makes it challenging for SEs to stay current on deal stages and technical criteria.

- SEs spend significant time on meeting preparation, follow-up, and repetitive tasks like demos, RFPs, and answering common technical questions.

- Measuring SE impact on key metrics—such as win rates and revenue—can be difficult.

- SEs must stay up-to-date on product changes and industry trends.They often contribute to product development and sales enablement.

AI Presales SE Spectrum: From Tools to Teammates

The landscape of AI Presales SE solutions can be understood along a spectrum that reflects their depth of impact on the sales motion. Rather than ranking individual vendors, this model illustrates four categories of solutions, each delivering value in different ways depending on a team's needs, complexity, and sales process maturity.

Task-Specific Tools: These are narrow, purpose-built solutions that solve a specific pain point—like technical demo creation. They typically serve as plug-ins to existing workflows, leverage AI, but don't influence the broader sales motion or reasoning.

Best For: Teams with a discrete pain point with minimal change management.

Content Assistants: These tools go a step further by generating presales content (i.e. RFPs, proposal response, technical discovery questions) using AI trained on company knowledge. While helpful, these outputs are typically *static* and require human review or workflow placement.

Best For: GTM teams that want to free up bandwidth for AEs and SEs by reducing content-heavy tasks.

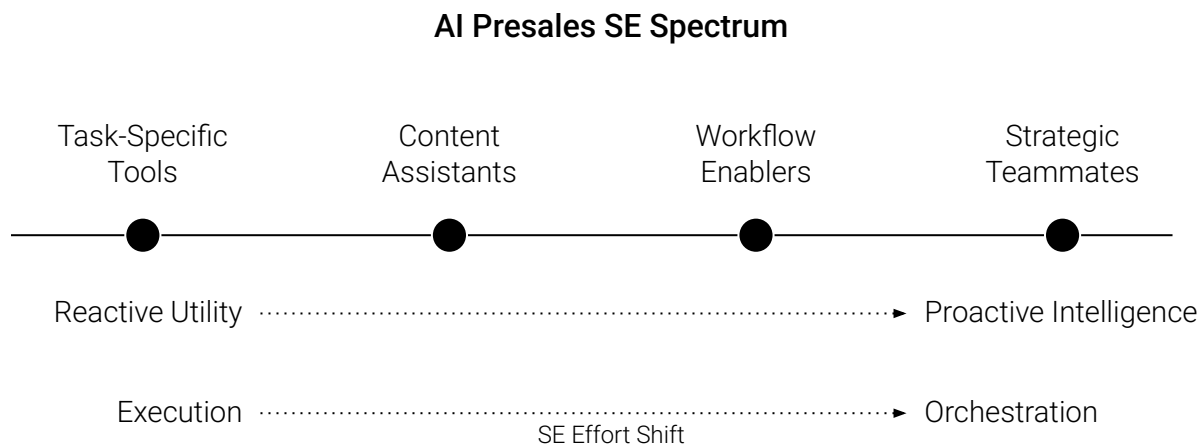[11] Consensus — 2024 Sales Engineering Compensation & Workload Report

Workflow Enablers: These platforms are integrated into the presales process and automate multi-step tasks like technical discovery, validation responses, and proposal workflows. They are *dynamic,* process-integrated functions for collaboration and consistency across deals.

Example: Automatically generating a first-draft solution design or architecture diagram based on notes from a technical workshop.

Best For: Organizations with growing deal volume and a need to scale technical coverage without expanding headcount linearly.

Strategic Teammates: These are the most mature solutions—AI agents that act as always-on SEs. They reason like a presales expert, navigate complex decision flows, and often tap into knowledge graphs or structured logic to drive personalized and accurate outputs across the entire sales motion.

Best For: GTM teams seeking to fundamentally transform presales operations, reduce technical friction, and equip every AE with SE-grade guidance.

AI Presales SE Spectrum

Task-Specific Tools	Content Assistants	Workflow Enablers	Strategic Teammates

Reactive Utility ┈┈┈┈┈┈┈► Proactive Intelligence

Execution ┈┈┈┈┈┈┈► Orchestration

SE Effort Shift

The key difference between categories often lies not in *what* the AI does—but *how* and *where* it fits into your revenue architecture. Technical discovery questions can be generated by any tier, but only some tools can deliver them in real-time, customized, and tied to account context.

Note: For each category, vendor solutions can be internally facing, externally facing prospects, or both.

Diverse AI Presales SE Capabilities

Today's AI presales SE solutions promise a wide range of capabilities that solve many presales team frustrations. Common use cases include:

- **Prep Assist:** Tools to suggest custom discovery questions or talking points before a technical discovery call

- **Custom Demo:** Automation that tailors demo scripts, presentations, product demos, or environments on-the-fly

- **Answer Bot:** Technical Q&A bots that deliver instant, precise answers from a company's knowledge base

- **Call Insights:** Conversation intelligence that transcribes and analyzes technical calls for insights and follow-ups

- **Live Avatar**: Interactive avatar in a live call with a prospect to answer technical questions

- **Proposal Builder:** Automated proposal document generation based on client requirements

- **Handoff Generator:** Auto-generated handoff docs summarizing customer requirements for post-sales

- **RFP Assistant:** RFP and security questionnaire assistants that draft responses

- **Design Development**: Preliminary solution designs or architectures based on workshop meeting notes

- **Proof-of-Concept (PoC) Manager:** Current solutions focus on the project management aspect of PoCs with AI that summarizes and surfaces signals like delays, sentiment, and risk factors.

Because these tools are designed for presales workflows, teams can target specific friction points—like repetitive technical Q&A, time-consuming proposal creation, or complex demo setup—and remove them from the critical path of the sales cycle.[12]

AI SEs and Human SEs – Collaboration vs. Replacement

Today's AI presales SE solutions are viewed as assistants rather than replacements for human SEs – at least for now. They excel at quick data retrieval, document drafting, and pattern analysis, but they lack the nuanced judgment, relationship-building, and creativity of a seasoned human SE. In fact, many solutions position themselves as "technical co-pilots" to augment human sellers.

Presales leaders are embracing AI to increase capacity without sacrificing quality, often by having AI handle low-level tasks while humans focus on complex solutioning and customer interaction. Still, there is some anxiety in the field: in one benchmark report, 38% of SEs believed AI could eventually replace their role.[13]

Our view is that AI will evolve the SE role rather than eliminate it – shifting presales SEs toward oversight, strategy, and creative consulting, with AI SEs doing the heavy lifting of repetitive tasks and providing data-driven insights. This synergy reduces burnout, improves efficiency, and expands presales coverage. Early evidence supports a collaborative future. In one case, an AI SE became the repository of "tribal knowledge" so effectively that when a top human SE left the company, the team still ran smoothly using the AI's retained expertise.[14] This kind of human-AI synergy is likely the model going forward.

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[12] Infosys. (2023). AI in Presales: Shaping the Future of Sales Enablement.
Consensus. (2024). Presales Solutions – Demo Automation for Presales and Sales Teams.
CDK Global. (2024). How AI Can Remove Friction from Your Sales Process.
Destination CRM. (2023). AI Can Help Eliminate Friction in the Customer Buying Journey.
Vivun. (2024). Ava: The World's First AI Sales Engineer.

[13] State of Presales Benchmark Report

[14] HeySam

Practical Insights

When deploying new GTM strategies, WbD uses a process-first framework. Similarly, when implementing an AI-driven presales solution, we recommend the team develop initial processes in order to align teams and form a stable foundation, follow with systems that reinforce the processes, and train your people to leverage the systems and the process to deliver maximum impact.

The below diagram illustrates how a typical startup begins with individual, high performers at the base of its culture, which can become unstable as it grows. Alternatively, building a robust set of processes as a base creates lasting cultural stability. This recommended approach holds true as we deploy automated GTM solutions like AI SEs.
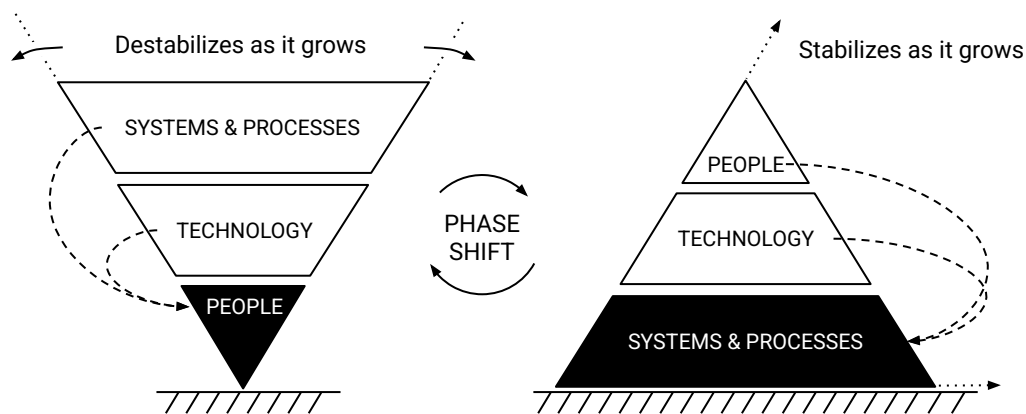
Based on best practices from Winning By Design and thorough interviews with leading vendors, we recommend the following approach as teams evaluate, design, and deploy AI SE solutions.

Process

1. **Document Existing Workflows & Validation Steps**
   - Clearly outline your current sales and technical-validation workflows (who approves what, how handoffs happen, etc.).
   - Decide where AI can alleviate bottlenecks (automating RFPs, generating discovery questions) without disrupting proven best practices.

2. **Embed Feedback Loops**
   - Ensure there's a structured approach for human experts (SEs, managers) to review AI outputs, provide corrections, and continuously improve accuracy.
   - Regularly test for consistency in technical answers and verify that content is up-to-date.

3. **Define Success Metrics**
   - Align on key metrics and track each to measure impact. Define what success looks like (i.e. reduced SE hours per deal, faster response times, shorter sales cycles) before launching. This focuses the AI SE solution on delivering tangible results.
   - Track usage, like which reps or SEs use the tool most and which content is used the most. Celebrate positive trends (signals buy-in) and fill gaps where needed with additional training where questions are most prevalent.

Systems

1. **Reinforce Processes with Technology**
   - Select an AI SE platform that naturally aligns with your processes (example: automates a known RFP process rather than introducing entirely new steps).
   - Incorporate vendor best practices for AI SE "training", personalization, and performance evaluation tools.

2. **Data Integration & Access**
    - Provide the AI SE solution with access to all relevant data sources (CRM, cloud storage, LMS, call recordings, etc.) so it can learn quickly and generate accurate responses.

    - Maintain data governance (encryption, role-based access) to protect sensitive information.

3. **Scalable Architecture**
    - Choose systems that won't break as usage grows—look for secure APIs, proven vendor partnerships, and robust configurations.

    - Continuously refine capabilities (i.e. advanced analytics, additional language support) only after the foundational processes are stable.

People

1. **Train & Involve SEs from the Start**
    - Position the AI as a "teammate," not a replacement. Engage top SEs to validate responses and share domain expertise.

    - Encourage user feedback so the AI "learns" from real customer scenarios, building trust and buy-in.

    - Take care to avoid over-burdening the human SE team. Don't assume the presence of AI SE deployments will immediately allow for greater AE to SE ratios right away.[15]

2. **Enable High Performers**
    - To encourage ownership, leverage the SE team to contribute and potentially own core process design, training, and systems decisions, as part of the deployment.

    - Incorporate skilled SEs in early phased deployment that can push the solution's capabilities further and offer sophisticated feedback and insights.

    - Leverage human SE account-specific knowledge to validate customized content for specific accounts or use cases, ensuring nuanced details aren't lost in AI SE automation.

- Get your best AEs involved to see which use cases are best suited for their personal adoption as well as where and when the new teammate can help the SEs that support them. Their opinions and support are necessary for broad adoption.

3. **Ongoing Change Management**
   - Set realistic expectations: the AI SE won't be perfect initially. Provide training intervals and highlight wins (i.e. faster response times) to sustain momentum.

   - Align rewards and recognition so that sharing knowledge with the AI SE solution becomes part of the team's success metrics and culture.

By focusing first on an aligned set of processes, deploying systems that reinforce those processes, and finally activating your best people to guide and refine the AI SE, GTM teams can create a stable, repeatable model of AI-driven presales excellence. This approach helps teams avoid the pitfalls of simply layering technology onto "rockstar" individuals and ensures long-term scalability.

More On Managing Change

Introducing AI into presales' efforts is as much about change management as technology. Executive leadership should clearly communicate to the sales and presales org why you're doing this – e.g., "We want to free you from low-value tasks so you can spend more time with customers and on complex problems." Address the "will this replace us?" question honestly – show that the intent is to augment the team, not replace.

We recommend managers be trained prior to the individual contributors (ICs), as they will be encouraging sellers and SEs on when and where to use and will be inspecting for proper usage throughout the process.

When IC training sessions begin, highlight time saved or frustrations eliminated (like "remember when you had to dig through a 50-page PDF for an answer? Now just ask the AI SE!"). As previously stated, remind ICs that the AI SE won't be perfect. Encourage the team to treat it like a junior team member that needs onboarding – their involvement to correct and improve it is key to long-term success. By positioning it as a collaborative helper and involving the team in its evolution, you'll foster a culture of humans and AI working hand-in-hand.

Leading Vendor Offerings

Below is an overview of each notable vendor that contributed to this research brief. Each is focused on enterprise and mid-market customers today.

- **1mind (1mind.com), Bay Area, CA:** AI-powered "Superhuman" avatars that act as virtual Sales Engineers, capable of handling complex product questions, qualifying prospects, and engaging with multiple buyers simultaneously.
- **Docket (docketai.com), Palo Alto, CA:** AI-powered Sales Engineer platform that delivers instant sales answers, automates RFP responses, provides real-time in-meeting knowledge support, and unifies sales knowledge to enhance presales productivity.
- **HeySam (heysam.ai), San Mateo, CA:** AI-powered sales copilot that assists AEs and SEs by providing real-time support during live calls, answering technical questions, and automating RFP responses.
- **SiftHub (sifthub.io), San Francisco, CA:** AI-powered sales engineer platform that enables sales and presales teams by automating response generation for RFPs and security questionnaires, streamlining project collaboration, personalizing client narratives, and centralizing knowledge access.
- **Storylane (storylane.io), San Francisco, CA:** AI-powered demo automation platform that now includes presales intelligence to streamline sales processes and enhance customer engagement.
- **Vivun (vivun.com), Oakland, CA:** AI Sales Agent that empowers sales teams by proactively generating contextually aware assets, work products and insights that accelerate sales cycles through the mid-funnel.

Future Trajectory

We're approaching a future where AI agents will become embedded across both SE and AE roles—replacing routine tasks and acting as highly-leveraged extensions of the team. As the technology matures, we won't just see automation of independent tasks, but true augmentation of how presales and sales work together to qualify, design, and deliver solutions.

- **More Autonomy:** Agents will handle entire segments of the presales process.

- **Tighter Integrations:** Deeper CRM integration, advanced analytics, expanded global language support, and product telemetry to surface common feature gaps.

- **Further Personalization:** Tailored responses and dynamic demos that adjust in real-time based on conversation cues.

- **Multimodal**: next-gen systems will integrate multimodal capabilities. For example, generating solution diagrams or interactive prototypes on the fly to illustrate a proposed architecture.

- **Low-Touch Deployment**: As AI SE tech improves, expect AI SE functionality to support most mid-market and SMB sellers at scale, becoming an "always available SE" in live calls where there has been little to no technical support available.

Final Word: The Time to Act Is Now

AI presales SEs aren't a future consideration—they're a present-day advantage. The companies winning today are not the ones asking if they should deploy AI in presales—they're deciding where it will create the most immediate impact. Those who lead will equip every seller with instant technical muscle, shorten cycles, and scale expertise across the funnel. Those who wait will struggle to keep up in a world where speed, precision, and consistency are the new standard. Start small, align around proven processes, and let AI shoulder the routine so your teams can focus on what matters most: winning deals and building trust. As we've seen time and again—those who adopt early don't just move faster. They change the game.

Want to make this happen?

[**Book Time with an Advisor**](#)

SUPPLEMENTARY MATERIALS

The following supplementary materials are available in the full version of this report, available to subscribers in the reference library. For more information on subscribing, see winningbydesign.com/access-pass.

01 **Vendor Descriptions**

02 **Vendor Comparison**

03 **RFP Template**

04 **Systems and Processes**

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