

Hi there,

The hardest-hitting line from Impact Summit in San Francisco wasn't a prediction. It was a diagnosis:

**“Your GTM system is running on 25-year-old infrastructure. By the time the gap shows in the numbers, it has already been compounding long enough to matter.”**

Three things from May are worth your attention. They all connect around one idea: **growth can be modeled from the top down, but it lives or dies at the system level. And AI is making both the math and the execution faster, sharper, and less forgiving.**

## **1. What We Learned from Winning by Design's Impact Summit PE & VC Panel**

**“Playing to Win Together”** was the highest-rated session of the day, cited in nearly 80% of attendees' top-three lists. Hilary Headlee from Insight Partners, Erik Kristjanson from Vista Equity, Amy Kramer from Level Equity, and Scott Allen Graham from Diversis Capital joined me to work through what is actually happening inside portfolios right now.

### **AI value creation is moving from hype to operating discipline.**

The funds and portfolio companies making real progress are not starting with shiny tools. They are starting with internal data: pipeline, deal intelligence, customer health, success scoring, ticket deflection, and workflow automation. The lesson is clear: clean the people, process, and data before expecting AI to create leverage.

### **The GTM operating model is changing fast.**

AI is not just making teams more efficient. It is reshaping how GTM teams are structured. New roles are emerging around AI governance, output quality, enablement, and GTM systems design. Sellers are also being asked to work differently, managing AI agents and automated workflows rather than waiting for IT to deliver the perfect stack.

### **The fundamentals still decide who compounds.**

The companies that win are still the ones with strong ICP discipline, clear RevOps infrastructure, sharp product marketing, and a board-level narrative that explains what is really happening in the business. AI may remove busywork, but it does not replace judgment, curiosity, customer understanding, or relationships. And when asked what separates companies that compound from companies that stall, the answers came down to four words:

**Intentionality. Speed. Architecture. Focus.**

## 2. Additional Impact Summit Takeaways: Three Sessions, One Thread

Dan Patterson, Dan Smith, and our CEO, Jacco van der Kooij, each took a different angle on the same problem: **why well-resourced teams still miss.**

### **Funnelism gave the room a word for a problem they were already feeling.**

Jacco's diagnosis: companies that over-invest in acquisition while the right side of the Bowtie atrophies are not running a growth strategy. They are running a leaky bucket faster. Moving from funnels to loops is the redesign.

### **Growth failure is a design flaw, not an effort gap.**

Dan Patterson opened with a principle that landed: "We don't need bigger ambition. We need higher confidence in our ability to execute." The choice every leadership team faces is the same: govern the system before the miss, or manage the number after it.

### **AI amplifies what is already there.**

Dan Smith presented findings from a study of 52,000 sales opportunities. Teams with clean systems and a shared operating language showed a 2.1x close rate and 2x ACV when AI was layered in. AI does not fix broken systems. It multiplies them.

## 3. Missed Impact Summit? Start with the May Issue of the Growth Journal

The May issue focuses squarely on **Growth Governance**. Three pieces are especially relevant to portfolio work:

### **The signal is when acceleration slows, not when growth stops.**

Jacco's opening essay tracks SaaS growth rates declining from 38% to 15% across 72 public companies since 2022. The compounding that created hypergrowth runs in both directions. By the time deceleration appears in the board deck, the system that caused it has already been running for a while.

### **Single-outcome forecasting is a governance risk.**

Dan Patterson's framework piece makes the case for probability-based growth planning. Executive teams often align around the same target number while operating from completely different assumptions about how it will be hit. Probability ranges expose the constraint underneath the forecast before scaling turns it into a miss.

### **CAC does not disappear in AI-native models. It moves.**

The journal's closing essay tracks customer acquisition cost as it migrates from S&M into COGS, R&D, and infrastructure spend. A board reviewing only S&M ratios may see apparent efficiency gains while total

acquisition cost quietly rises across the P&L. That is not a marketing win. It is a governance blind spot.

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## Upcoming Operating Partner Dinner

We are also hosting an upcoming Operating Partner Dinner in **Napa Valley on June 24, 2026**. [RSVP here](#).

If any of these topics are showing up inside your portfolio, from AI value creation to GTM operating model redesign to growth governance, I'd welcome the chance to compare notes and dive deeper.

**To continued growth,**

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