Hi there,

It's 4:30 on a Friday and your rep has time for one more call. Who gets it?

That test came up at our October 20th dinner in New York, and it captured the night well. More than 25 GTM Operating Partners, two questions: where is AI moving the P&L today, and what are the highest-performing teams doing differently?

Here's what we heard.

1. The wins are boring, and that's the point.
Where AI has hit the bottom line, it has mostly been on the inbound side and in the repetitive work nobody misses. One portfolio company automated accounts payable, cutting work that used to take months, with higher accuracy and less need to hire. Another, in maritime, uses AI agents to file the certificates required every time a ship enters port. One table put the follow-up question plainly: what are we doing with the hours we just got back?

2. Better pipeline, not more pipeline.
That Friday call is where lead scoring earns its keep. With it, the rep calls the highest-potential ICP account. Without it, they're guessing, or calling a lead 15 times that was never going to convert. Many teams are still targeting too wide. The signals have always existed, but combining them was too manual. AI finally lets teams see them together in real time.

3. The metric worth stealing.
One firm moved from pipeline coverage to the percentage of reps at or above 80% of quota, against their prior baseline. It's a forcing function. If an AI initiative won't help a rep close more deals, don't do it. Attribution is clear on cost and still murky on bookings, so this is the most useful proxy I've heard.

4. Build versus buy got real.
One founder went from 39 SaaS tools to four, with all of his data now in a single central system. Another table went straight to new revenue: services firms productizing their own IP, methodologies and data into recurring revenue. Those firms typically trade at 5.5 to 9x EBITDA. With the product carved out, the group is seeing 18 to 20x, and one recently sold at 22.5x.

5. And still, it comes back to leadership.
One operator put it best: the leadership of the executive team matters more right now than it ever has. This moment is spotlighting weaknesses and accelerating strengths. AI is an accelerant to whatever vision you already have, and you can sprint in the wrong direction faster than ever. What has to be true: give people real time to build and share what they learn (not on weekends), resist cognitive offloading, and invest in growing your executive teams into this new way of doing business.

The common thread: AI is rewarding the teams that already know what they're trying to do.

What's new at Winning by Design

A few things that map closely to what we heard at the table:

→ **The 3X Seller**: If the 80% attainment metric resonated, this is a great opportunity to go deeper. In this webinar, Jacco and team will make the case that the middle of your sales team holds the biggest growth opportunity, and map the path from skills to agents to workflows.
→ **Applying Compounding Growth Loops to Awareness**: A new working paper on replacing the funnel with an awareness loop, for a world where growth comes from your user base, not your lead database.
→ **AI for GTM Course**: Now accepting enrollments, for portfolio teams sitting on AI licenses they barely touch.

As always, I'd love to hear where this lands across your portfolio. Reply anytime.

To continued growth,

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