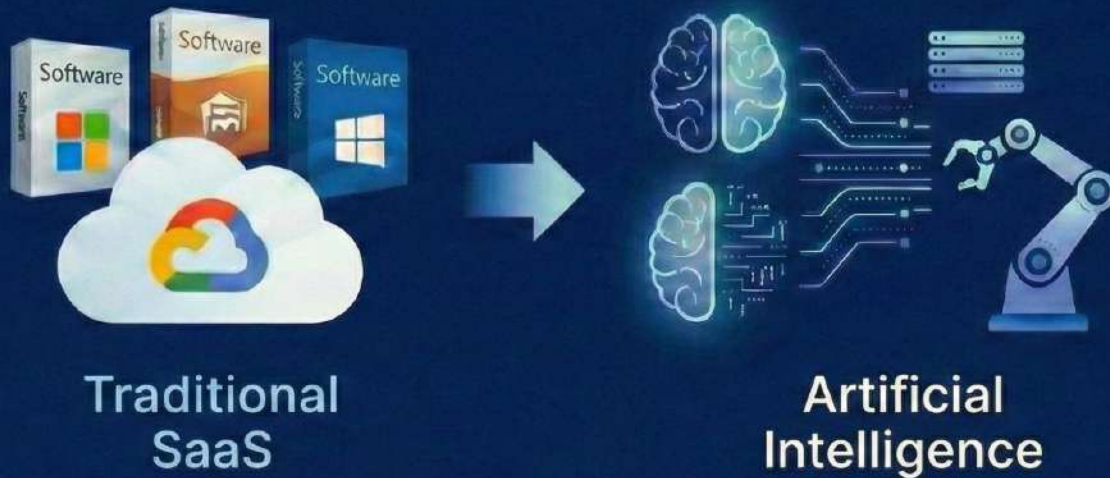




# THE SAAS AI PLAYBOOK

How SaaS Companies Can Deliver Better Results for Customers and Run Faster Internally Using AI

Victor Cheng

[victor@SaasCEO.com](mailto:victor@SaasCEO.com)



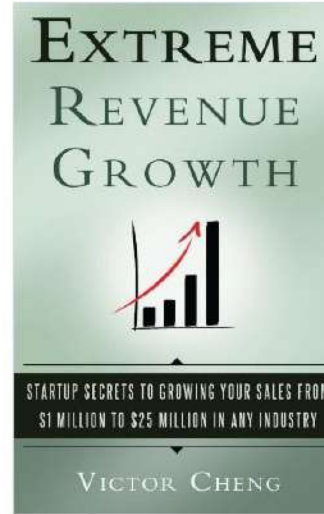
# THE SAAS AI PLAYBOOK

## AGENDA

- 1 The Big Picture
- 2 AI in Products
- 3 AI for Operations

# VICTOR CHENG

- \* SaaS Independent Board Member, CEO Advisor & Coach
- \* \$3M-\$25M ARR -> Scale -> Institutional Capital Exit
- \* \$225M in Exits since 2021
- \* CEO Advisor since 1995
- \* SaaS since 1999
- \* Former McKinsey Consultant
- \* Stanford Alumni
- \* Guest Speaker: Harvard, Oxford, MIT



WALL STREET JOURNAL

Entrepreneur

TIME

# SECTION 1: THE BIG PICTURE



## AI HEADLINES...





**WHAT'S THE  
RIGHT WAY TO  
THINK ABOUT AI  
FOR A SAAS  
COMPANY?**

# MENTAL MODEL

- Traditional SaaS
- AI Native

# MENTAL MODEL

- ~~Traditional SaaS~~
- ~~AI Native~~
- Results (as a Service)



# TRADITIONAL SAAS VALUATION DRIVERS

Mostly Lagging Indicators

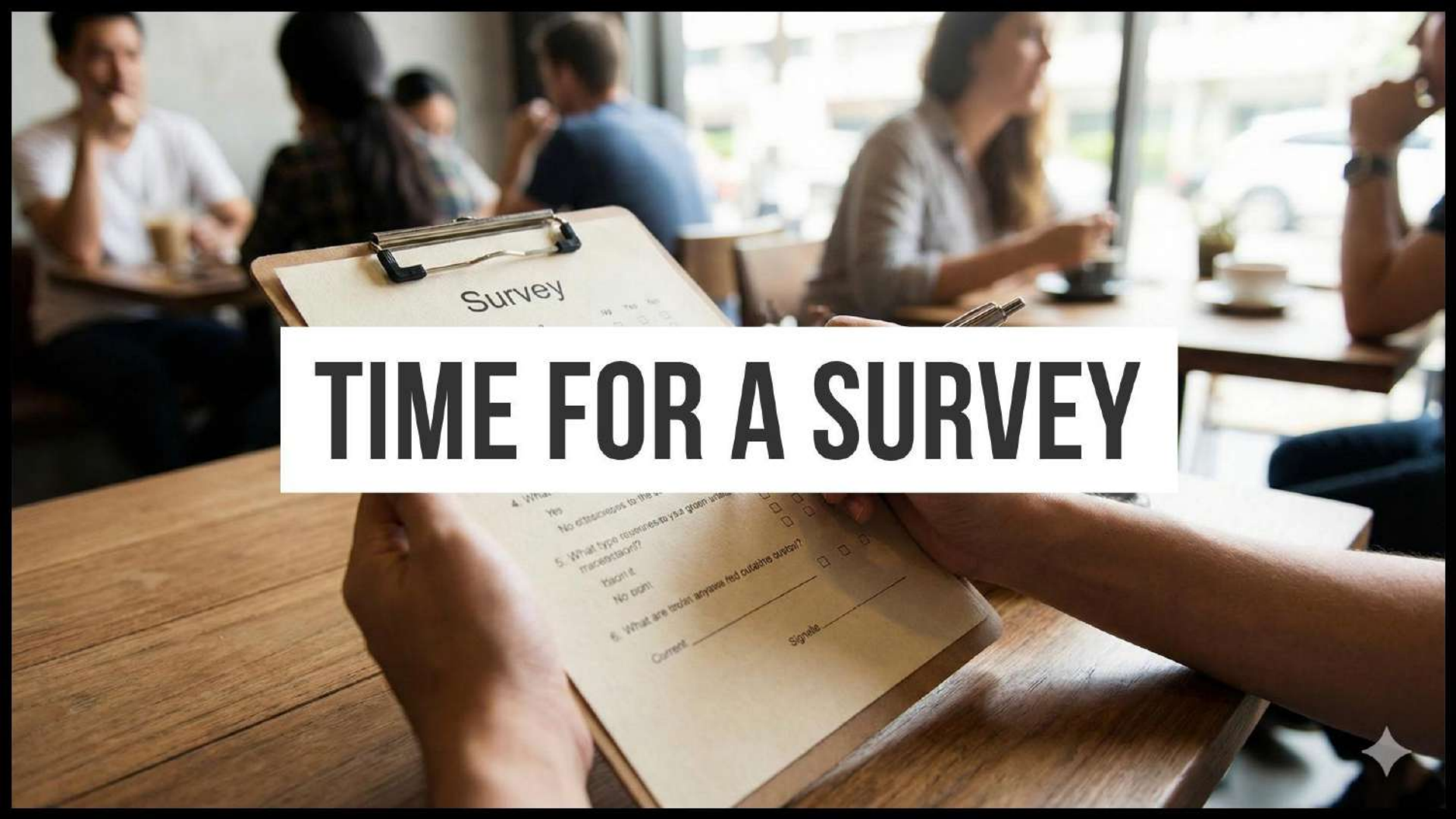
- 1 \$ Annual Recurring Revenue
- 2 Top Line Growth Rate
- 3 Gross Margin %
- 4 Rule of 40
- 5 Gross/Net Revenue Retention
- 6 Total Addressable Market
- 7 Sustainable Competitive Advantage



# LEADING INDICATORS OF VALUATION IN AN AI-FORWARD WORLD

- 1 % of Customers that Achieve Promised Results
- 2 Magnitude of Results Achieved



A person's hands are holding a clipboard with a survey form in a cafe. The survey form has the word "Survey" at the top and several questions. In the background, other people are sitting at tables, and a window shows a car outside.

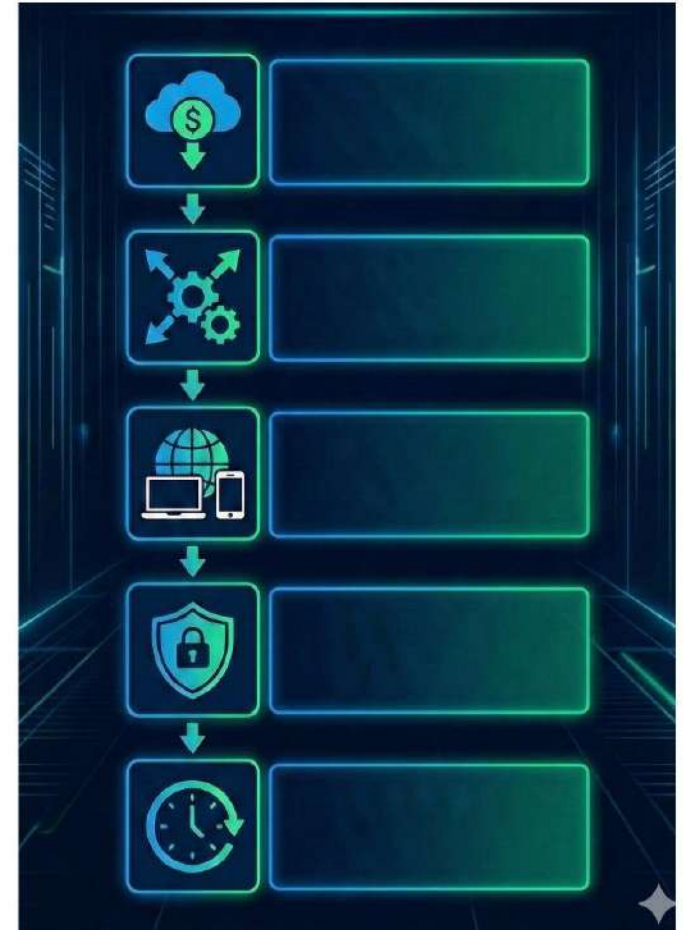
Survey

**TIME FOR A SURVEY**

4. What  
Yes  
No (discusses to the w  
5. What type responses to you given un  
reaction?  
No point  
6. What are brain anyone fed outside oven?  
Current \_\_\_\_\_  
Signale \_\_\_\_\_

# The *Temporary* Advantages of Traditional SaaS Companies

- 1 System of Record (often)
- 2 Domain Expertise
- 3 Go-To-Market Distribution
- 4 Trusted Relationship
- 5 Advantaged Position to Deliver "Results"





## Downsides of Traditional SaaS

- 1 Complacency
- 2 Stuck in Traditional SaaS Paradigm

# EXAMPLES OF TRADITIONAL SAAS VS. AI THINKING

|                     | SaaS Paradigm           | AI Paradigm                                 |
|---------------------|-------------------------|---------------------------------------------|
| User Experience     | Good User Interface     | Best User Experience is "No" User Interface |
| Customer Engagement | Logs into App Regularly | Never Needs to Log into App                 |

# ADVANTAGES OF AI NATIVE STARTUPS

- 1 No Tech Debt
- 2 Unburdened by Legacy Customer Commitments
- 3 AI App Development -> Lower Cost / Higher Speed



# DOWNSIDERS OF AI NATIVE STARTUPS

- 1 No/Limited Access to System of Record
- 2 Limited Domain Expertise Needed to Generate Bottom Line Results (as Opposed to Just Cool Demos)
- 3 Limited Go-To-Market Distribution
- 4 Low Trust Factor



An hourglass with red sand is the central focus, sitting on a rustic wooden desk. The hourglass is made of brass and glass, with the sand flowing from the top bulb to the bottom. In the background, there are several old books and some papers, suggesting a study or library. The lighting is soft and warm, coming from a window on the left. A white text box is overlaid in the center of the image.

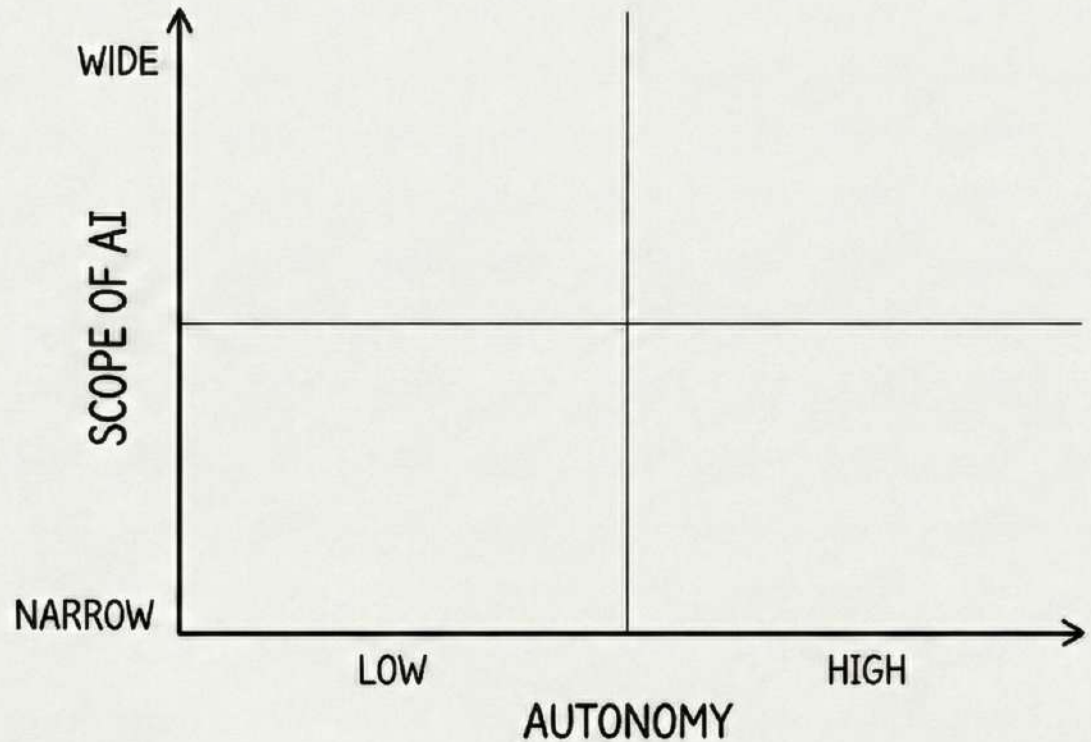
**All Traditional SaaS Advantages and AI  
Native Obstacles are Temporary**



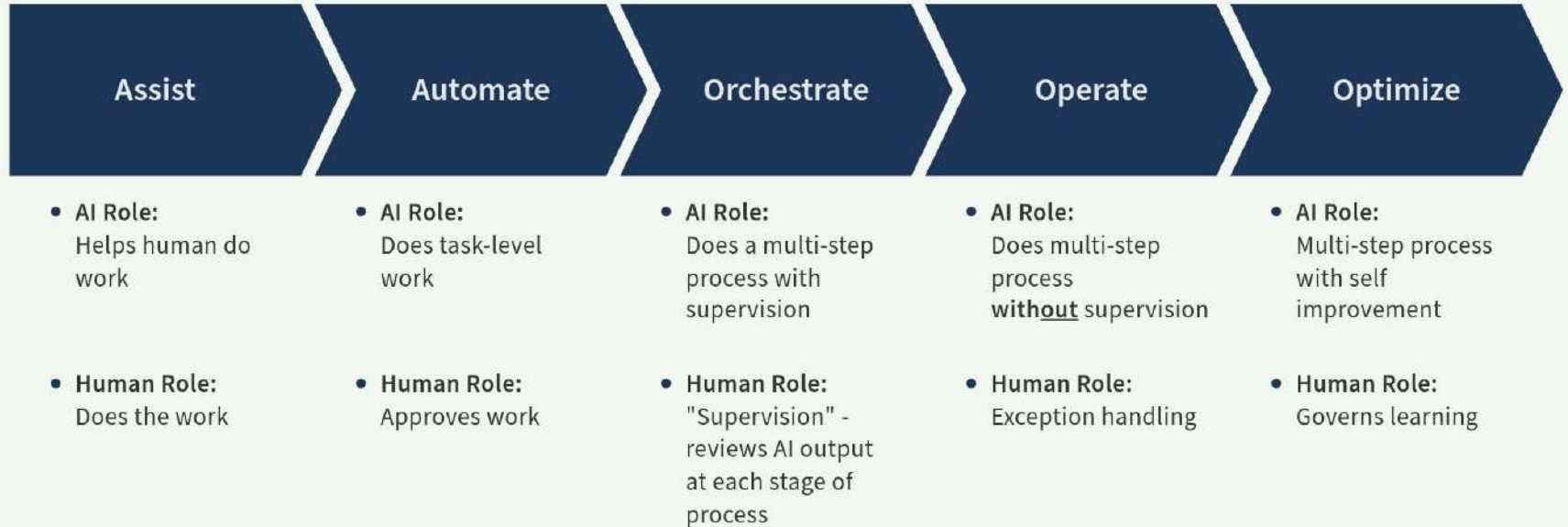
# SECTION 2: AI IN PRODUCTS



# HOW TO THINK ABOUT IMPLEMENTING AI IN PRODUCTS



# AI AUTONOMY





# AI SCOPE

Results

Operating Cadence

Process

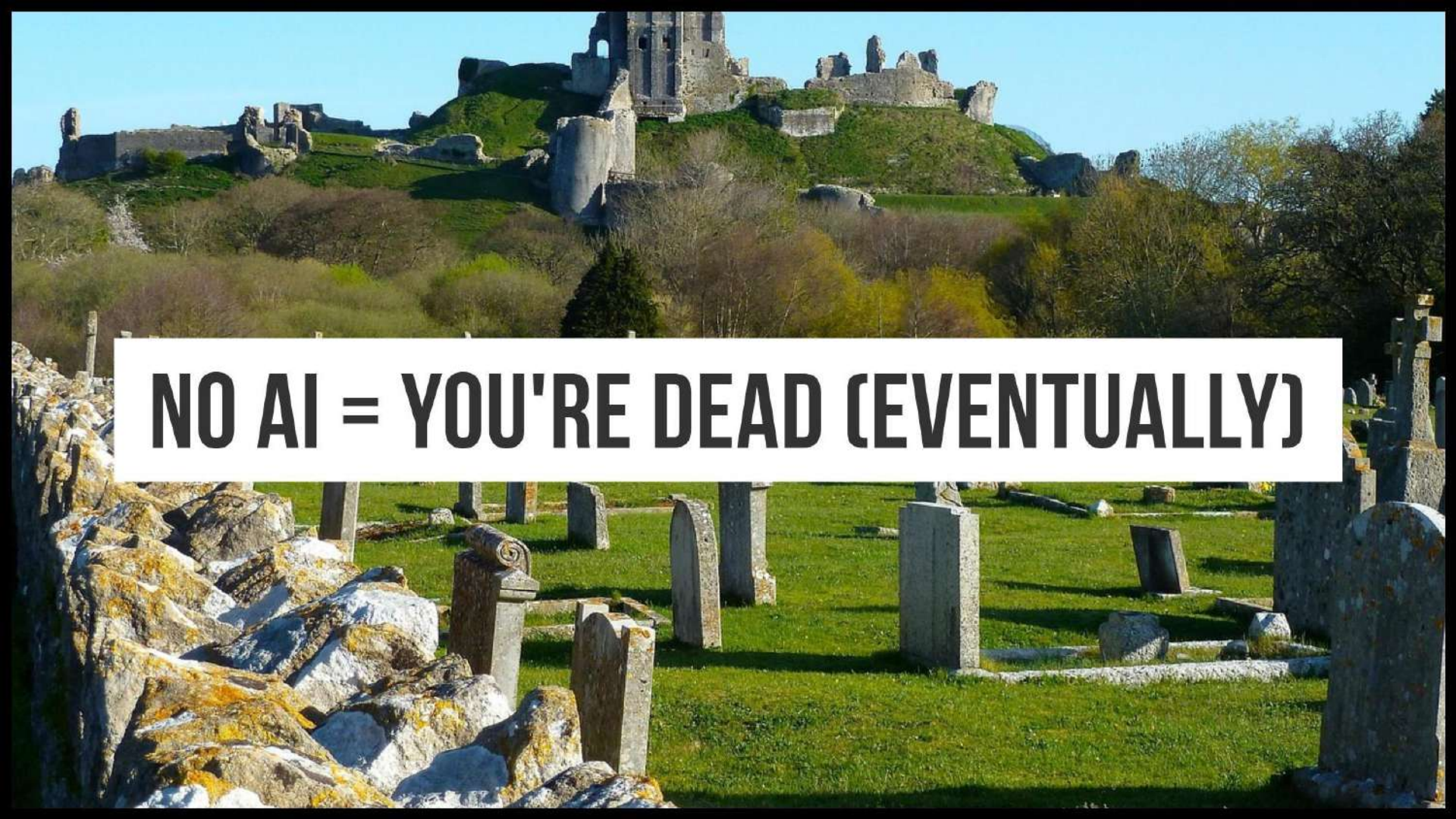
Workflow

Task



# AI SCOPE - SALES EXAMPLE



The image shows a scenic landscape under a clear blue sky. In the background, a hill is topped with the ruins of a large, ancient stone structure, possibly a castle or monastery, with several towers and walls. The hillside is covered in green grass and some trees. In the foreground, there is a cemetery with numerous stone grave markers of various shapes and sizes, some of which are weathered and covered in moss. The overall scene suggests a place of historical significance and quiet reflection.

**NO AI = YOU'RE DEAD (EVENTUALLY)**

# FOUR KEY DECISIONS REGARDING AI PRODUCT STRATEGY

1) Specific Measurable Result

2) Scope of AI Work

3) Level of AI Autonomy (and Human Involvement)

4) Timing



# THE AI STRATEGIC "CHESSBOARD"

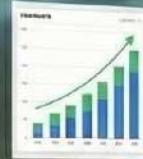
|                     | DEGREE OF AI AUTONOMY |          |             |         |          |
|---------------------|-----------------------|----------|-------------|---------|----------|
| SCOPE               | Assist                | Automate | Orchestrate | Operate | Optimize |
| Results             |                       |          |             |         |          |
| Operational Cadence |                       |          |             |         |          |
| Process             |                       |          |             |         |          |
| Workflow            |                       |          |             |         |          |
| Tasks               |                       |          |             |         |          |

# THE AI STRATEGIC "CHESSBOARD"

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|---------------------|-----------------------|----------|-------------|---------|----------|
| SCOPE               | Assist                | Automate | Orchestrate | Operate | Optimize |
| Results             |                       |          |             |         |          |
| Operational Cadence |                       |          |             |         |          |
| Process             |                       |          | 2028-1H     | 2028-2H | 2029-1H  |
| Workflow            | 2026-Q3               | 2027-1H  | 2027-2H     |         |          |
| Tasks               | 2026-Q1               |          |             |         |          |

# CASE STUDY EXAMPLES

## CASE STUDIES:



**PROBLEM:**  
Legacy Systems

**SOLUTION:**  
Cloud Migration

**IMPLEMENTATION:**  
Agile Dev & CI/CD

**RESULTS:**  
Scalability &  
Savings



# THE AI STRATEGIC "CHESSBOARD"

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| Operational Cadence |                       |           |                             | Samsara.com |          |
| Process             |                       |           | ServiceTitan.com<br>"Atlas" | Samsara.com |          |
| Workflow            |                       | Vanta.com |                             |             |          |
| Tasks               | HelpScout.com         |           |                             |             |          |

# *AI clears the way.* **Your support team creates the impact.**

Help Scout gives teams the right blend of AI and people-powered tools to scale support without losing the personal touch customers love.

[Start for Free](#)
[See Pricing](#)


## Automation where it helps

Your always-on AI assistant resolves 70% of routine requests on average.



## People at the heart

Hands-on conversations go to the right teammate in your shared Inbox.



## Insights to improve

Help Scout learns from every interaction to sharpen all your future replies.



# The personal touch, delivered at scale

The screenshot displays a CRM dashboard with a dark blue header. The header contains navigation links: Inboxes, Docs, Messages, Reports, Customers, and Manage. On the right side of the header are icons for notifications, help, search, and a user profile. The main content area is titled "Invoice billing details" and features a green "Active" status button. A sidebar on the left lists various CRM functions. The central focus is a message thread with Julie Martinez, dated Mar 18. The message is a draft created with AI, starting with "Hi Julie!" and providing a detailed response to her email request, mentioning a fix being shipped tomorrow. It concludes with a promise of an updated invoice and an "Insert" button. The right sidebar shows Julie Martinez's profile, including her email, title as Board Member, and location. Below the profile is a "Properties" section with fields for Account ID (15550), Beacon Installed (Yes), and Last Seen (2025-02-01). A "Conversations" section is partially visible at the bottom.

**Header:** Inboxes, Docs, Messages, Reports, Customers, Manage

**Message Thread:**

- From:** Julie Martinez (Mar 18)
- Subject:** Invoice billing details
- Status:** Active

**Draft with AI:**

Hi Julie!

Thank you very much for your email, we can definitely assist with this request! I've gone ahead and made the appropriate changes, but you'll be happy to know we're shipping a fix tomorrow where you'll be able to make these changes via your account in the future!

You should receive an updated invoice with the updated details momentarily.

**Insert**

**Right Sidebar:**

- Profile:** Julie Martinez, jules@stellartech.com, StellarTech Solutions Board Member, Blueville, United States
- Properties:**
  - Account ID: 15550
  - Beacon Installed: Yes
  - Last Seen: 2025-02-01
- Conversations:**



Draft with AI

Hi Julie!

Thank you very much for your email, we can definitely assist with this request! I've gone ahead and made the appropriate changes, but you'll be happy to know we're shipping a fix tomorrow where you'll be able to make changes via your account in the future!

You should receive an updated invoice with the updated details momentarily. ●

Insert

e.g. Translate to Spanish



✦ Draft with AI



Saved reply



Docs link

# THE AI STRATEGIC "CHESSBOARD"

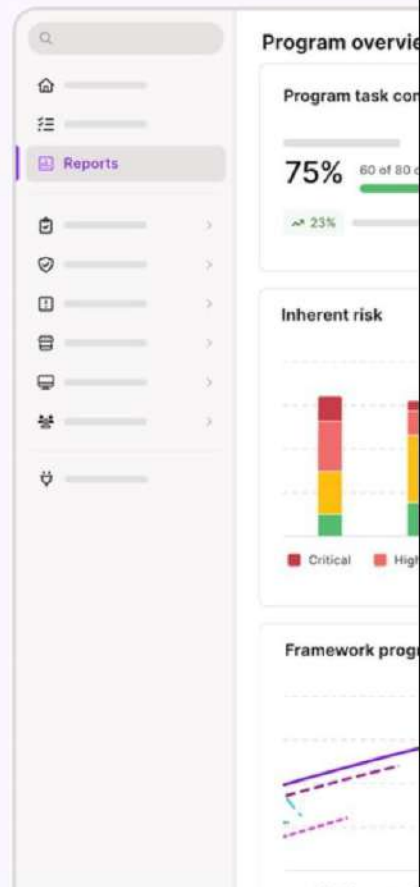
|                     | DEGREE OF AI AUTONOMY |           |                             |             |          |
|---------------------|-----------------------|-----------|-----------------------------|-------------|----------|
| SCOPE               | Assist                | Automate  | Orchestrate                 | Operate     | Optimize |
| Results             |                       |           |                             | Samsara.com |          |
| Operational Cadence |                       |           |                             | Samsara.com |          |
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| Workflow            |                       | Vanta.com |                             |             |          |
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| Workflow            |                       | Vanta.com |                             |             |          |
| Tasks               | HelpScout.com         |           |                             |             |          |

# Automate compliance, manage risk, and accelerate trust with AI

Vanta helps you get compliant *fast*. And we don't stop there. Our AI and automation power everything—from evidence collection and continuous monitoring to security reviews and vendor risk—whether you're starting up or scaling.

[Get started](#)



## Leading security and privacy frameworks

Vanta offers support for over 35+ industry leading [compliance](#) frameworks plus the ability to customize your own.



## Vanta AI

Vanta AI works across your security and compliance workflows, helping you instantly pull data from vendor security reports, automate high-confidence answers to security questionnaires, and more.



## Access Reviews

Vanta's solution automates and accelerates your access review process, saving time and money while reducing the risk of misused credentials.



## Workspaces

Vanta Workspaces lets you customize and manage compliance for multiple business units within a single Vanta account.

# THE AI STRATEGIC "CHESSBOARD"

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Commercial ▾

Residential ▾

Products ▾

Resources ▾

[Get Demo](#)

# The #1 software for commercial and residential trades

Email



[Get Started](#)



Capterra  
4.5 ★★★★★



Software Advice  
4.5 ★★★★★



**FLOW**  
SERVICE PARTNERS

**DEL-AIR**  
HEATING-AIR CONDITIONING-APPLIANCES

**ENCON**

**INTERSTATE** **AC SERVICE**

**Southland**

**ROTO-ROOTER**

**COBA**  
SERVICE PAY



# Just Ask Atlas

Interact with ServiceTitan by simply talking to Atlas.

Who was the last tech to service this location?

How many visits do they have left on their service agreement?

Can you adjust capacity rules to deprioritize tuneups?

What are the compatible replacements for this OEM part?

When did the customer call this in?

Get immediate answers to questions about performance  
and consumer trends simply by asking Atlas.

# THE AI STRATEGIC "CHESSBOARD"

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|---------------------|-----------------------|-----------|-----------------------------|-------------|----------|
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| Workflow            |                       | Vanta.com |                             |             |          |
| Tasks               | HelpScout.com         |           |                             |             |          |



[Solutions](#) ▸ Safety and Risk

# The most trusted and reliable safety platform

Reduce accident risk, lower insurance costs, and improve driver retention with the industry's most complete AI-powered safety platform

[See a Demo](#)



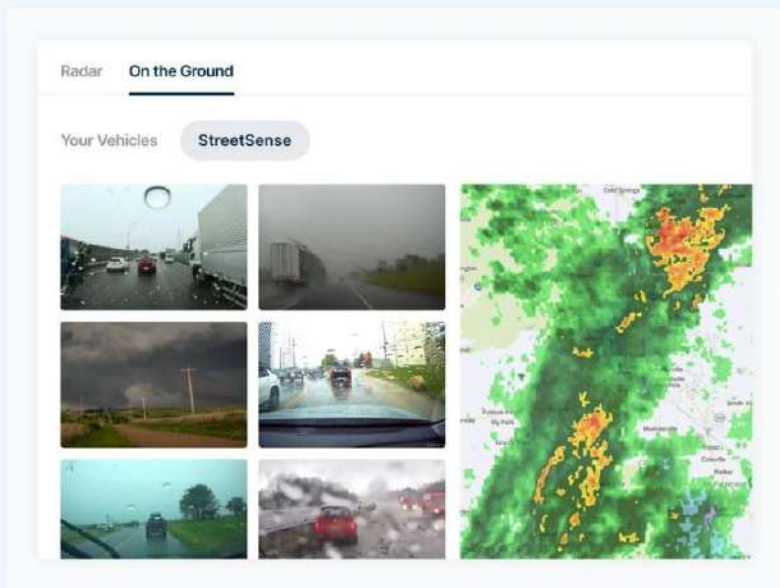
## Stay ahead of severe weather

Get a real-time view of weather risks and impacted drivers, see conditions on the ground through the Samsara Network, and instantly alert drivers in severe weather zones.

### Real-time visibility

## Ground-level insights

### Actionable alerts



### Get a street-level view

Go beyond radar with real-time, on-the-ground views. See dash cam footage from your vehicles in severe weather zones, or access anonymized stills from nearby connected vehicles in the Samsara community via Samsara StreetSense. Get eyes on real-time road conditions so you can act quickly with the most accurate picture of what's happening on the ground.



Comprehensive Visibility

# Detect 30+ safety risks on the road

Move beyond single-event detections. Samsara's industry-leading AI sees 30+ driver and road risks—from unsafe behaviors to road hazards to blind spots and patterns—and automatically delivers insights to managers, helping fleets act faster and operate more safely.

Explore AI dash cams



## Performance Overview

### Safety Score

92 ↑ 17%

Your Safety Score increased slightly due to reduction in speeding events.

### Driver Efficiency Score

52 ↑ 2%

Your Efficiency Score improved, driven mainly by improvements in the High Torque and Coasting factors.

### Drivers to Recognize



[Maria Lopez](#)



Safe Speed for 20h

Milestone

Times reached: 10

### Drivers to Review



[Josh Levitz](#)



Inattentive Driving (4)



Mobile Usage (3)

## Scalable Coaching

# AI-powered coaching at scale

Give every driver consistent, daily feedback without overwhelming your team. Samsara's AI reviews every event, flags high-risk situations for managers, and automatically gives feedback to drivers for lower-risk moments. The result: focused coaching where it matters most, safer drivers, and a world-class safety program—no matter your team size.

[Learn more](#) →

# Our customers see real results

Learn how organizations are reducing accident rates, improving worker safety, and retaining drivers.

[Read more stories](#) →



50%

Fewer accidents



50%

Decrease in driver attrition



\$4.4M

Saved in insurance costs



86%

Decrease in accident costs



75%

Reduction in drowsy driving



81%

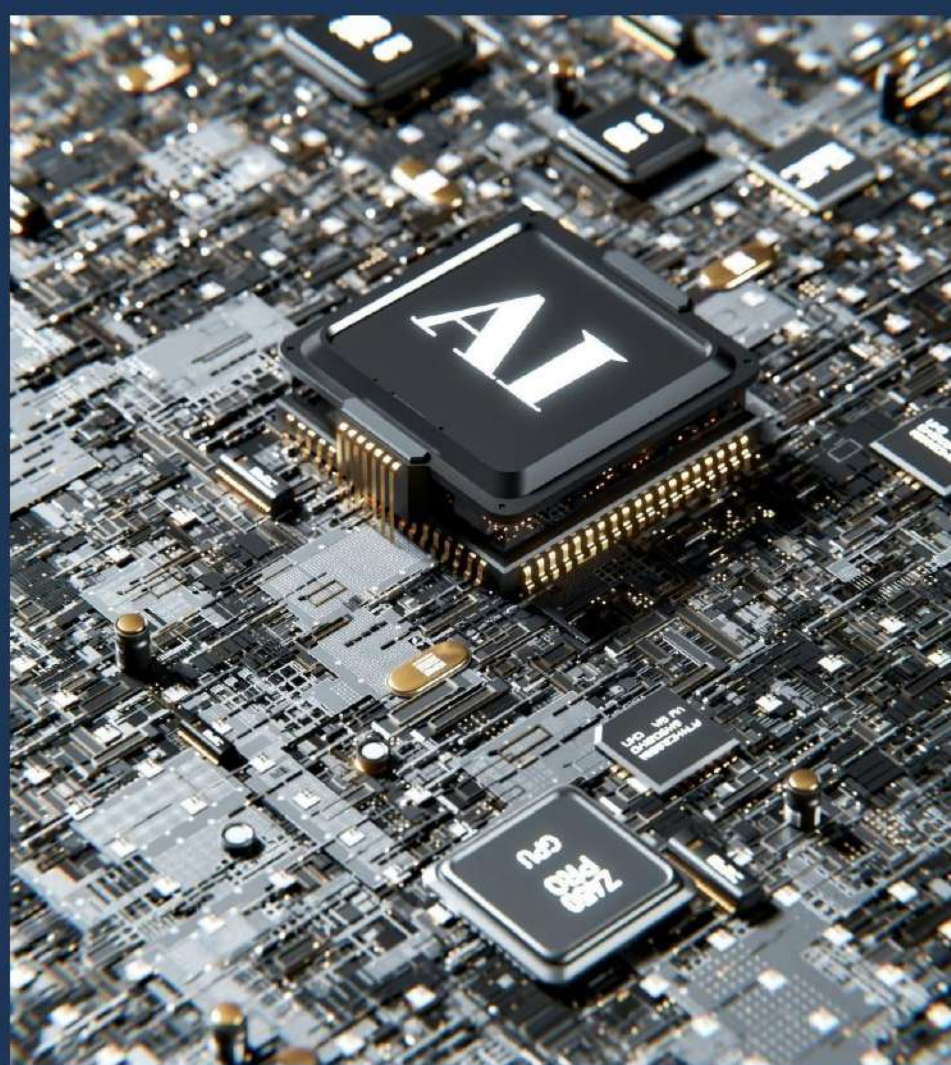
Decrease in cell phone use



# THE AI STRATEGIC "CHESSBOARD"

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# SECTION 3: AI FOR OPERATIONS



# AI FOR OPERATIONS

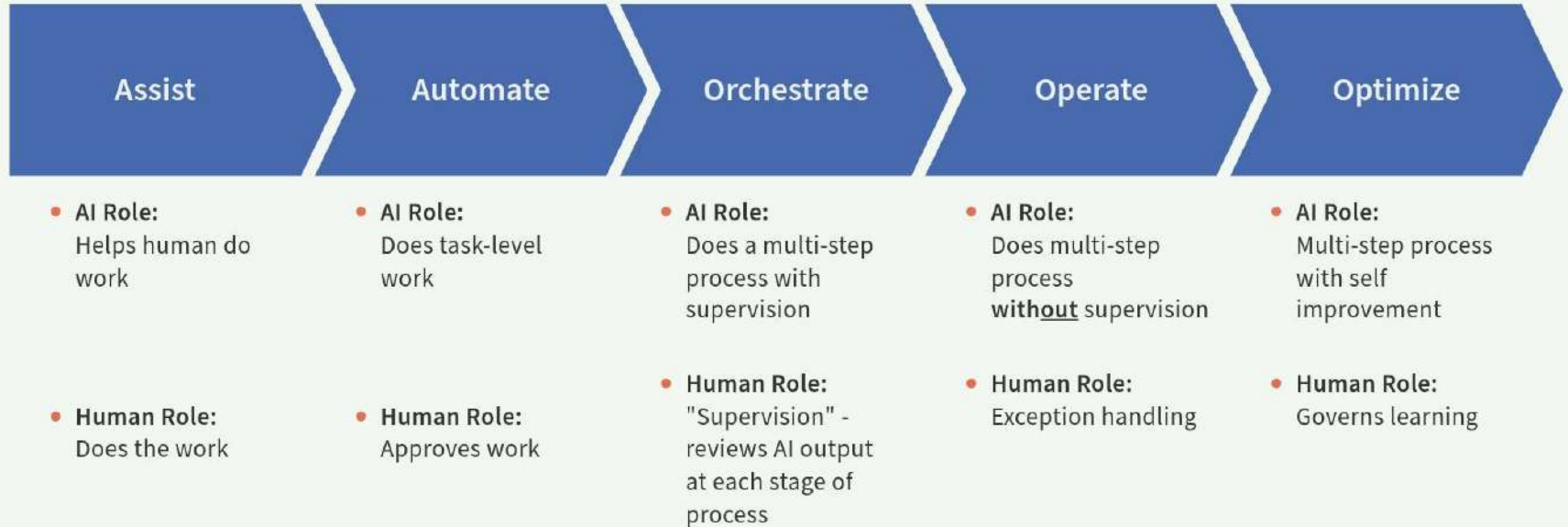
- 1 AI Maturity for Internal Operations
- 2 AI Insights for CEOs
- 3 Training vs. Using AI Models
- 4 AI Training Best Practices
- 5 Using AI Best Practices
- 6 Skills Needed in an AI-Ready Organization
- 7 AI Demo



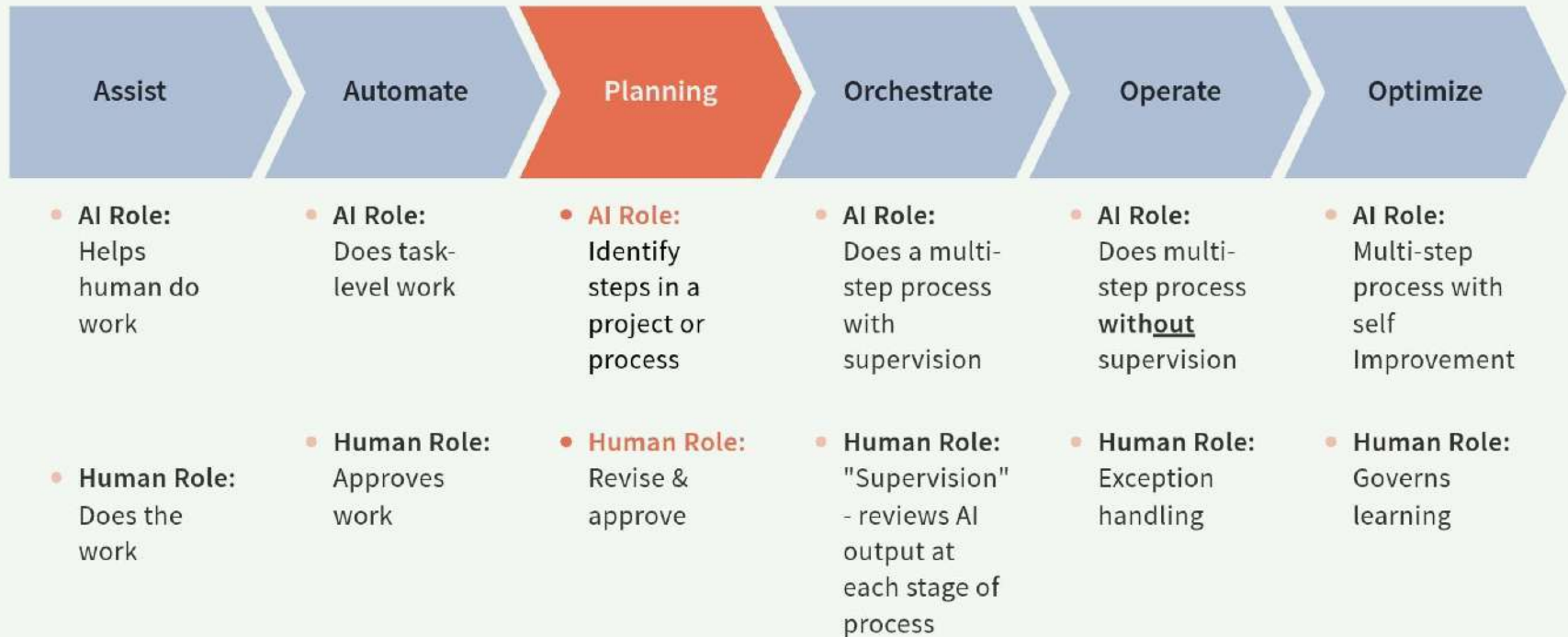
The background image shows a vast industrial facility, likely a semiconductor manufacturing plant. The upper portion of the image captures the high ceiling with a complex network of white steel trusses and numerous industrial lights. The lower portion shows a clean, brightly lit floor with various pieces of machinery, including what appears to be a large automated assembly or testing station. Two workers in light-colored uniforms are visible in the distance, providing a sense of scale to the massive space.

# AI Maturity for Internal Operations

# AI AUTONOMY



# AI AUTONOMY - INTERNAL OPERATIONS



# AI AUTONOMY - INTERNAL OPERATIONS





# AI SCOPE - INTERNAL OPERATIONS

Results

Operating Cadence

Process

Workflow

Task



# **Top 5 AI Insights for CEOs**



## **INSIGHT #1**

**CEOS MUST USE AI PERSONALLY AT  
MODERATE -> ADVANCED LEVEL.**

## INSIGHT #2

AI IS VIABLE AND PRACTICALLY  
USEFUL IN EVERY FUNCTIONAL  
AREA.





## INSIGHT #3

**BIGGEST CONSTRAINT TO AI  
ADOPTION = PSYCHOLOGICAL  
(NOT TECHNICAL).**

## INSIGHT #4

**AI IS NOW PRIMARILY A CEO  
LEADERSHIP / CHANGE  
MANAGEMENT ISSUE.**





## **INSIGHT #5**

**MOST UNDER-RATED AI USE  
CASE (ESPECIALLY FOR CEOS):**

**USE AI TO MENTOR YOU IN AI.**



# Training vs. Using AI Models





# AI BEST PRACTICES

Train AI

Use AI

A photograph of a rugged, snow-capped mountain peak against a soft, pastel sky of pink and blue. The foreground shows dark, rocky slopes with patches of snow. A white rectangular box is centered over the middle of the image, containing bold black text.

**TRAINING AN AI MODEL MAKES A  
DRAMATIC IMPACT ON RESULTS**



# **AI Training Best Practices**



# AI TRAINING BEST PRACTICE #1

## DOCUMENT SEEMINGLY OBVIOUS THINGS IN .PDF OR .MD FORMAT

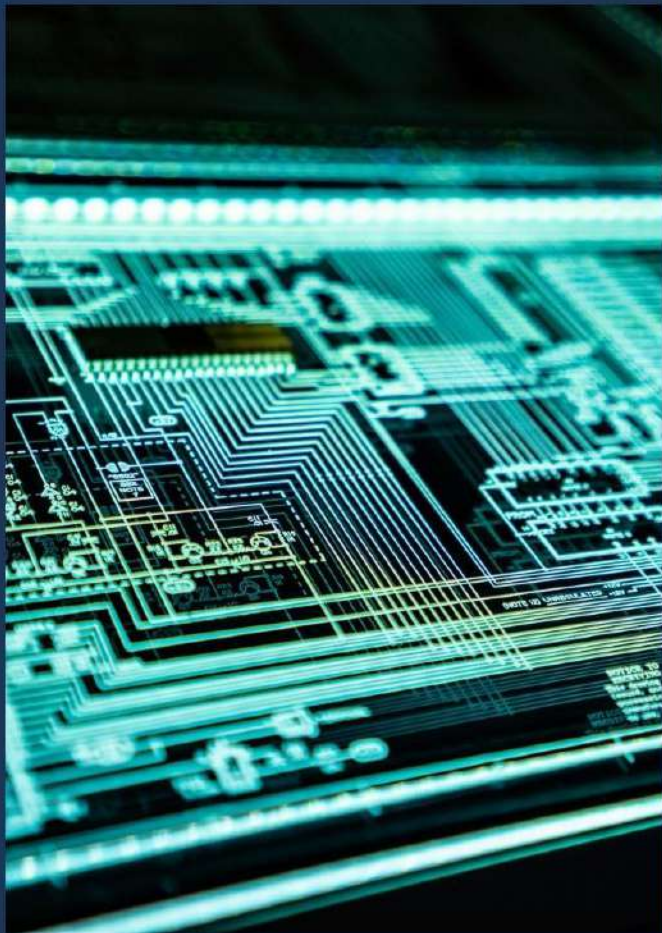
- Company Background
- Ideal Customer Profile Dossier
- List & Description of Company Products
- Employee Directory with Titles + Employee Bios/Profiles

# AI TRAINING BEST PRACTICE #2

**MAKE UNSTRUCTURED  
DATA ACCESSIBLE TO AI**

**.PDF, .TXT, .MD, CHATGPT  
CONNECTORS, VECTOR DB**





# AI TRAINING BEST PRACTICE #3

## DATA SETS OF GOOD OUTCOMES ARE PRICELESS!

Data Sets Are the New Intellectual Property

### Examples:

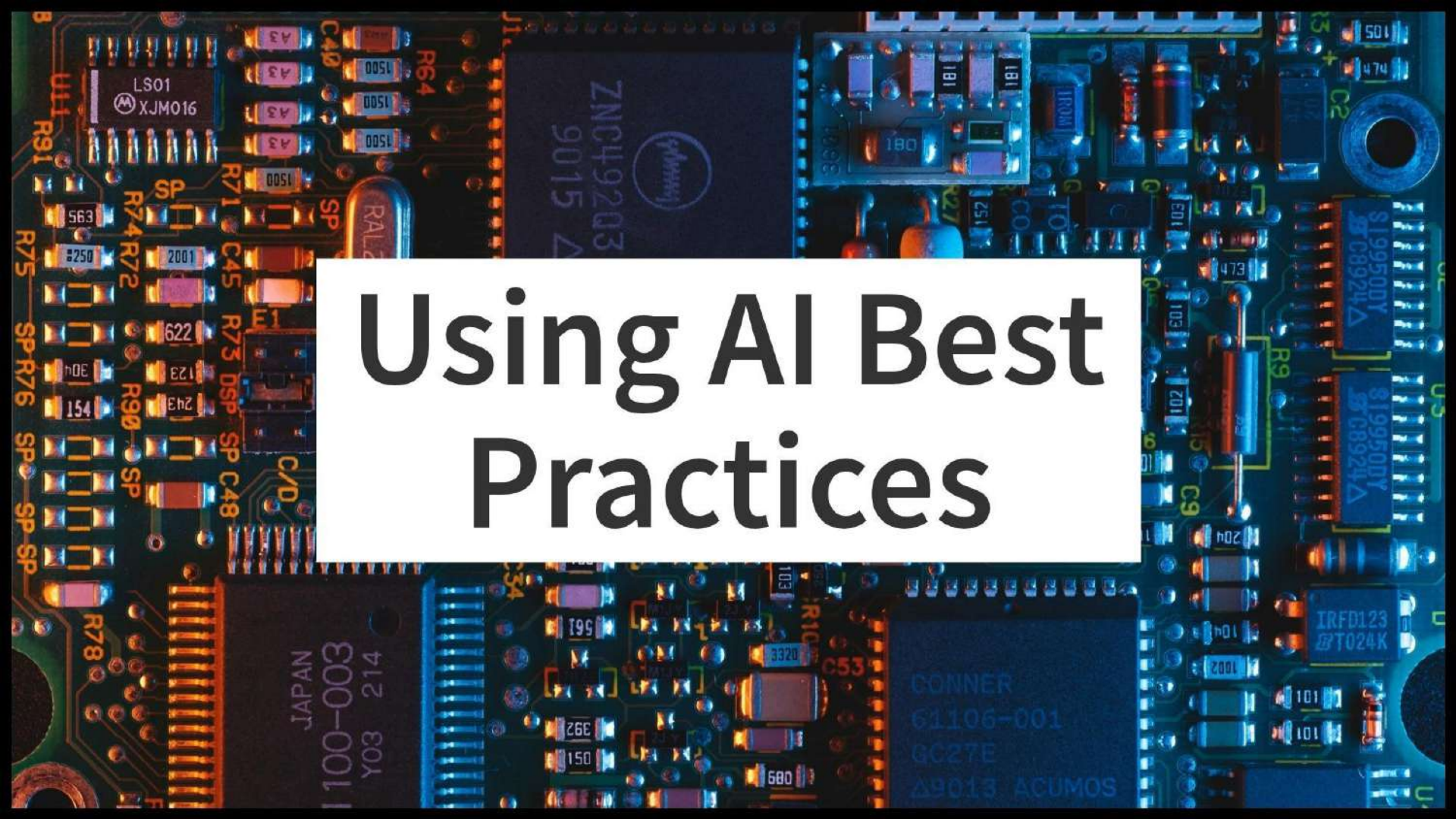
- PDF transcript of every closing sales call this year
- PDF of last 180 days of emails from top performing SDR
- PDF transcript of onboarding calls from #1 onboarding rep
- PDF transcript of all calls with our top 10% LTV customers

# AI TRAINING BEST PRACTICE #4

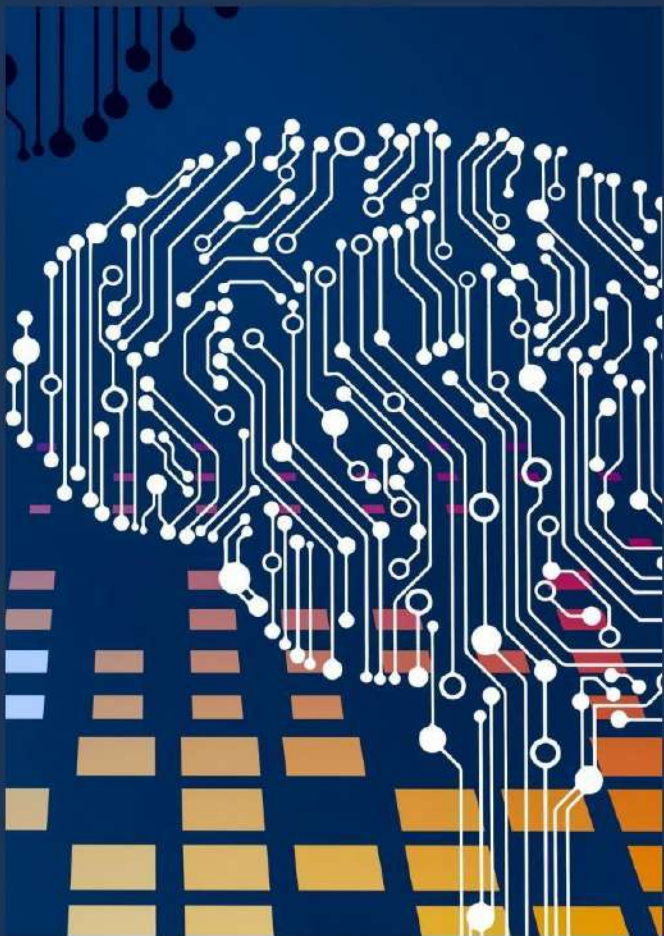
Document Procedures, Protocols, Best Practices, Company Preferences/Conventions in .PDF or .MD Format

If needed, use AI to create these from unstructured data.





# Using AI Best Practices



# USING AI BEST PRACTICE #1

Feed AI Training Data BEFORE Asking It to Do Work

What can I help with?

+ |Ask anything



## What can I help with?

+ Ask anything



 Add photos & files 

 Company knowledge

 Create image

 Deep research

 Web search

... More

 Company knowledge

## What can I help with?

+ Ask anything



📎 Add photos & files

🧠 Company knowledge

🖼️ Create image

🔍 Deep research

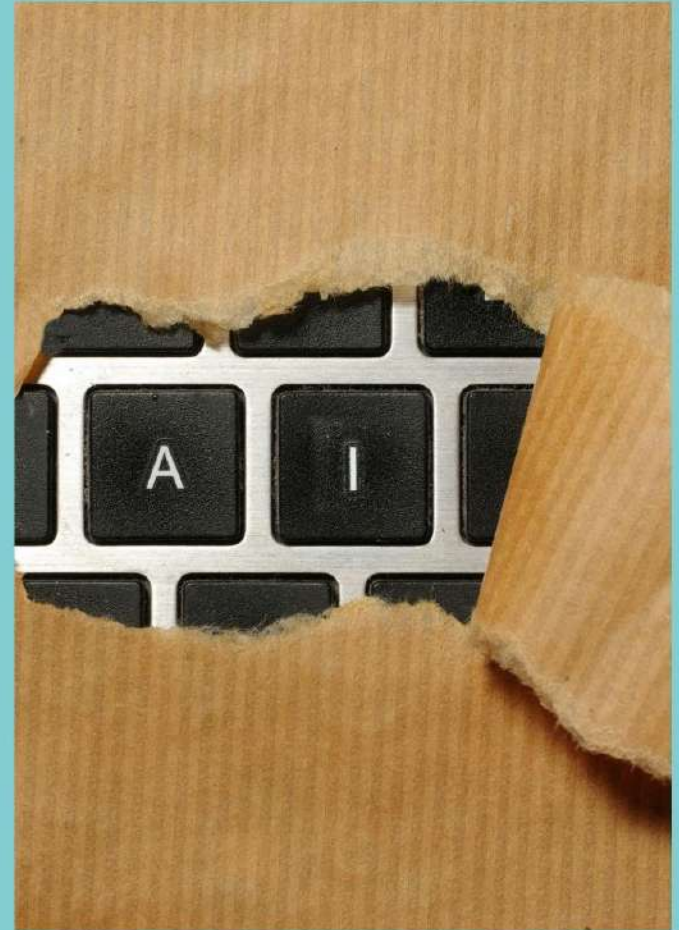
🌐 Web search

⋮ More

🧠 Company knowledge

# USING AI BEST PRACTICE #2

Break Up Big "Asks" Into Multiple Small Requests ---  
And (This Is Key) Check Results of Each Step





## USING AI BEST PRACTICE #3

Ask AI to develop a project plan (with many small tasks) that you review BEFORE you have AI do any one task.

Have AI do one task, then check results before assigning it the next task in the plan.

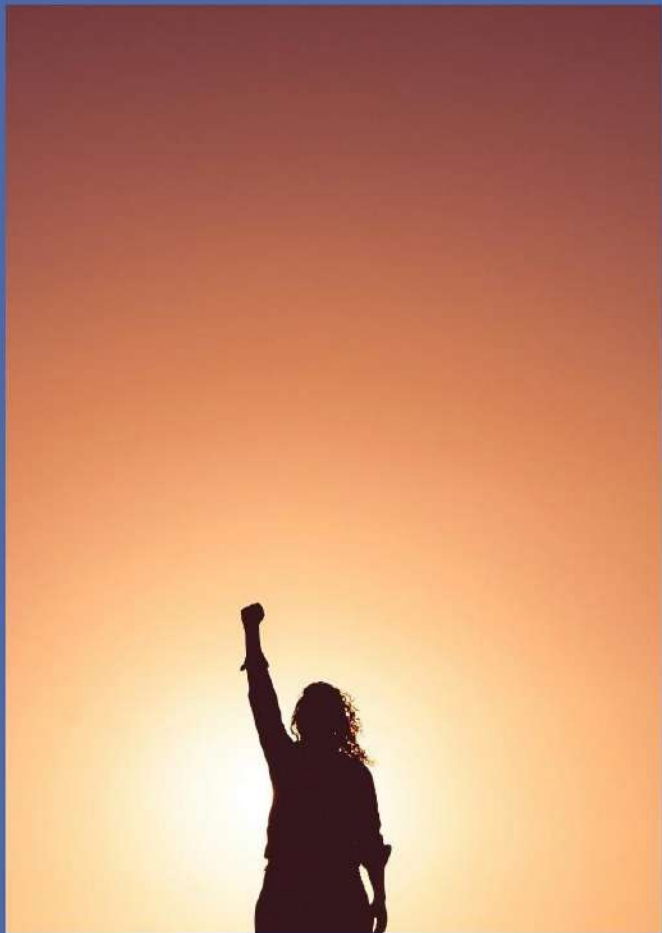
# USING AI BEST PRACTICE #4

Create and SAVE New Documentation as You Go



# SKILLS NEEDED IN AN AI-READY ORGANIZATION





# AI-READY ORGANIZATION SKILL #1

## AI (Business) Leadership

# AI-READY ORGANIZATION SKILL #2

Gathering AI Training  
Data + Data Hygiene +  
Data Infrastructure





## AI-READY ORGANIZATION SKILL #3

### Subject Matter Expertise

Examples:

- Top Salesperson
- Top Customer Success Manager

# AI-READY ORGANIZATION SKILL #4

## Process Design & Choreography





## **AI-READY ORGANIZATION SKILL #5**

### **Quality Control for AI Results**

# AI Demo





# THE SAAS AI PLAYBOOK SUMMARY

- 1 The Big Picture
- 2 AI in Products
- 3 AI for Operations

# THANK YOU

Victor Cheng  
victor@SaasCEO.com

Additional Free Resources:

- Book: Extreme Revenue Growth
- Internal Operations AI Prompts Playbook

