AI Adoption Workshop for a B2B SaaS Company

How Instinctools helped a data intensive enterprise software provider turn ambitious AI ideas into a structured transformation roadmap using workshops, discovery sessions, and prototyping.

Key AI adoption challenges for a B2B SaaS company include fragmented data across systems, limited cross-functional alignment, and lack of governance. A successful AI adoption workshop should work in practice and governance foundations needed to scale AI securely.

Business challenge

For many B2B SaaS companies, the main barrier to AI adoption is turning scattered fundamentals into structured, executable roadmaps.

Without a clear adoption strategy, AI initiatives can easily fragment into isolated experiments that never reach production. Teams may launch pilots without the data, product teams lack the capacity to translate AI capabilities into customer value, and customer success teams try to adopt tools that don't integrate with their workflows. The result is costly spend, low user engagement, data protection, and proof that their investments will create measurable business value.

The organization had not yet agreed on what it should mean for the business to become AI-driven, which processes should be prioritized for acceleration, or what risks it was willing to accept in exchange for moving too fast in many directions at the same time.

That was the point our client, a SaaS company providing data management and analytics tools for financial institutions, reached. From our early conversations with the client, it became clear that the company was eager - urgent, even - to adopt AI. The pressure was real: competitors were moving, customers were asking, and the organization was already rolling out AI-powered features and every month spent experimenting without a plan increased the risk of wasted effort and missed opportunity. The challenge was not whether to begin adopting AI but how to do it in a way that actually mattered, and that avoided creating more fragmentation in the process.

There were four critical questions hanging in the air:

- What are the highest-value AI opportunities for our business?
- Which initiatives should we start with and why?
- Which foundational capabilities must be in place before we can scale AI safely?
- How do we move quickly without creating duplicated pilots, governance gaps, or rework later?

Struggling to find a way through these challenges and strengthen the client's foundations for AI, Instinctools suggested:

Solution

To help the client move from an open-ended AI exploration to a structured, actionable roadmap, Instinctools ran a custom AI adoption workshop, designed as a paired engagement: workshops for business and product leaders, followed by hands-on prototyping. **The outcome: clear priorities, ownership per area, feedback-driven prototyping, and a final team roadmap.**

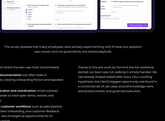
By the end of the workshop, the client received high-value deliverables:

- Strategic recommendations
- AI opportunity map
- Prioritized initiative shortlist
- Reusable prototype in action mode
- Examples of usage scenarios
- Delivery adoption plan
- A policy guidance
- AI training and best practice framework

01 Using a tailored survey as the entry point instead of a generic AI agenda

Instinctools kicked off the engagement with a tailored survey designed to surface the client's current state, their mapped the opportunity landscape, and identify which teams were most ready to participate in a signature internal pilot. Starting with a structured survey rather than a generic workshop made this a deliberate, data-informed decision.

The engagement was structured as a paired workshop and discovery sessions with business and product leaders, followed by hands-on prototyping. The survey was designed to surface the client's current state, map the opportunity landscape, and identify which teams were most ready to participate in a signature internal pilot. Starting with a structured survey rather than a generic workshop made this a deliberate, data-informed decision.



The survey revealed that many employees were actively experimenting with AI tools, but adoption was uneven and not governed by one shared priority.

It also showed where the pain was most concentrated:

- **Product development** was the strongest candidate for AI-assisted prototyping, shortening friction and repeated rework in early delivery.
- **Customer enablement and onboarding** was a recurring bottleneck made it harder to track open items, owners, and next steps.
- **Sales and customer workflows** such as pipeline tracking, client onboarding, and customer feedback synthesis, also emerged as opportunities for AI-assisted support.

Thanks to this pre-work, by the time the live workshop began, participants had already shared their views, the data had already shaped expectation about where AI could matter, and the conversation could start from a shared baseline rather than from scratch. The survey also helped surface which teams were most ready to participate in a pilot, and which parts of the business were most exposed to risk, duplication, and governance gaps.

02 Mapping AI opportunities across the business on Day 1

The first day of the two-day workshop session started with us presenting the survey findings back to the client's teams. We used it as a way to ground the discussion in what participants had already signaled, where opinions diverged, and which operational pains had the strongest signal.

From there, we moved into the AI opportunity map.

During the session, Instinctools AI experts introduced a set of potential initiatives grouped into four families.

Important AI accelerators (potential initiatives)
AI general access to relevant models via platform
AI initiative scoring
AI assisted data quality checks
AI-assisted prototyping for product teams
AI-assisted documentation and knowledge capture
AI-assisted onboarding
AI-assisted customer feedback synthesis
AI-assisted pipeline tracking
AI-assisted customer support
Intelligent support routing
Intelligent support knowledge
Intelligent support insights
Intelligent support automation
Intelligent support quality
Intelligent support governance
Intelligent support integration
Intelligent support adoption
Intelligent support scale
Intelligent support value
Intelligent support risk