Pre Study

AI Use Cases in Enterprise Sales Process

SprintlyWorks©

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About SprintlyWorks

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About

SprintlyWorks©

SPRINTS-AS-A-SERVICE

Answer Big Questions &
Deliver Sustainable Impact

Visit Our Website

- Established in 2018
- Headquartered in Helsinki
- 15 members strong:
  - Knowledge Analysts
  - Senior Consultants
  - Experienced Managers
  - Sales, HR, and Finance

We advise top management across industries...

Industrial Equipment
Metals & Mining
Pulp & Paper
Chemicals

...on most pressing & complex problems in:

Business Development
Sustainability
Corporate Strategy
AI & Digital

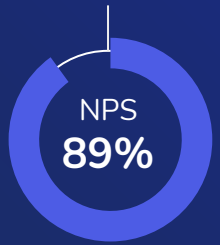
Recognition & Awards

Featured on World Economic Forum for being a trailblazer in Future of Work

One of The Top 8% Achievers in 2024 ranked by Kauppalehti – Finland's largest economic publication

Customers appreciate our impact

Consistent NPS over 5 years



ABB

> “***The work of the team was important*** *in increasing the level of awareness and urgency on the selected subject internally.*
>
> ***Director, ABB***

kemira

> “*I have to say that from quality perspective team exceeded all targets.* ***Fast, intense – “Sprint Manner”*** *way of working showed well its power.*
>
> ***Senior Vice President, Kemira***

TOYOTA

> “*I have completed 23 years in the industry and I’m not that easily impressed but I must* ***say astonished by the result*** *you have here.*
>
> ***Director Strategic Innovation, Toyota - Material Handling***

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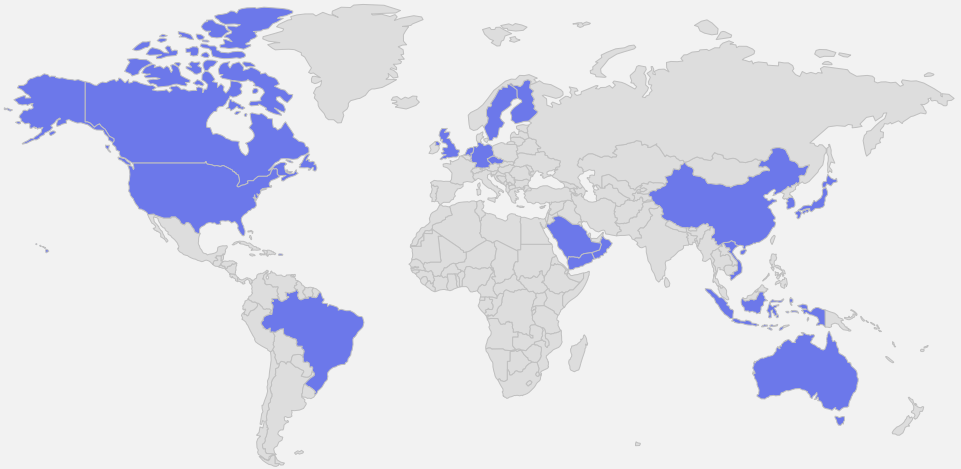
We have successfully served 40+ clients locally rooted in Finland with a global ambition

SprintlyWorks has been trusted by more than 40+ Finnish companies to conduct research spanning 20+ countries, namely

- **Americas** – US, Canada, Brazil
- **Asia** – India, UA, Qatar, Vietnam, China
- **EMEA** – Sweden, UK, Germany



Finland

NOKIA, Fazer, Stora Enso, UPM, elisa, NESTE, KONECRANES, Kemira, Outokumpu, FINNAIR, Metsä, Alko, PAULIG, st1, L&T, Valmet, Huhtamaki, Fortum, VAISALA, posti

Nordics

SANDVIK, Danfoss, VATTENFALL, essity, Orkla

Global

ANDRITZ, TOYOTA, GE, ABB

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Executive Summary

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Situation

- Enterprise sales have grown more complex and strategic, with **senior management now playing a central role in designing and delivering phases** including crafting tailored proposals, ensuring value delivery under increasing scrutiny, etc.
- The challenges stem from fragmented data, siloed functions, rising compliance demands, etc.; all of which make it **difficult to maintain alignment, speed, & precision across the process**
- There is growing urgency to **embed AI into sales workflows**, not only to manage complexity but to enable smarter decision-making that meets both internal performance goals and evolving client expectations

Objectives

1. **Identify the core challenges** leadership face in complex enterprise sales
2. Explore how **AI adoption augment decision-making** in sales workflow
3. Examine **real-world AI application case studies** to drive measurable outcomes

SprintlyWorks aimed to answer the following questions in the research report:

1. What are the **primary challenges** leadership encounter during enterprise sales?
2. In what ways can **AI be effectively integrated** into current sales workflows?
3. How has AI been **successfully applied in real-world** sales scenarios?

Executive Summary

SALES CHALLENGES

Key challenges in the RFQ[1] & Delivery phases of the sales process

- Generic RFQ response
- Failed technical validation
- Unclear business cases
- Confusing scope
- Low deliverable adoption
- Abandoned deals
- Non-compliance

AI MODEL SOLUTIONS

High-impact AI-powered solutions

- Call summary using NLP
- AI-driven feedback clustering
- Ai-powered value calculators
- Auto-generated sows
- Personalized onboarding flows
- Buyer intent scoring
- Auto-generated audit documentation

EXEMPLARY CASE STUDIES[2]

workforce

- AI-powered platform to **streamline the workflow of time-consuming RFP**[3]
- **50%** cut in proposal preparation time

savills

- AI proprietary platform to **automate analysis of lease documents**
- **70%** fewer errors in extracted data

usbank

- AI application to **improve financial wellness offerings**
- **10%** increase in savings account deposits

Capgemini

- AI-powered buyer intent tools to **seek opportunities**
- **40%** increase in sales-ready leads

Note: 1. RFQ = Request for Quotation; 2. Full 7 case studies will be deep-dived in the next chapters; 3. RFP = Request for Proposals

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Our Perspectives

Sales Challenges & AI Model Solutions

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Limitations in current sales process to be addressed by AI solutions

Phase	Desired Outcome	Suboptimal Practices in Current Sales Process		
Discovery	• High-fit leads • Clean & segmented account list • Qualified engagement	63% of leads requesting demos won't purchase[1]	50% of initial outreach targets the wrong person[2]	70% of B2B sales emails remain generic[3]
Diagnosis	• Needs understanding • Stakeholders identified • Aligned action plan	77% of complex purchases due to misaligned needs[4]	64% of sales rep. struggle to identify decision makers[2]	60% of sales teams lack training to uncover nuanced needs[5]
RFQ[6]	• Tailor RFQ response • Technical validation • Clear business cases	64% of sales rep. struggle to deliver resonated insights[6]	58% of sellers fail to prime cust. during presentations[6]	50% tech. challenges drive 50% projects overruns budget[7]
Delivery	• Scope clarity • Deliverable adoption • Signed contract • Compliance	30% of late-stage deals fail due to unforeseen objections[8]	60% of deals stall at closing due to lack of alignment[2]	76% of leaders said compliance become more complex[9]
After Sales	• Health visibility • Opportunity signals	45% of enterprise deals face post-sale disputes[3]	40% of non-renewal from lack of proactive support [2]	30% higher churn rates in the due to overpromising[5]

High-level Executive's Major Concerns

(Deep Dive in Next Slides)

Source & Note: 1. Will not purchase for at least 3 months; Laire; 2. Rep. = Representatives. LinkedIn; 3. Hubspot; 4. Gartner; 5. Close; 6. RFQ = Request for Quotations; Rep. = Representatives; Cust. = Customer. Richardson Sales Performance; 7. ERP Software Blog; 8 .Revenue Grid; 9. PwC

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Key challenges in the RFQ & delivery phases of sales process

RFQ

GENERIC RFQ RESPONSE[1]

- Generic value proposition
- Misaligned message
- Poor client insight

FAILED TECHNICAL VALIDATION[2]

- No proof of performance
- Slow feedback cycles
- Mis-comm. between different functions

UNCLEAR BUSINESS CASES[2]

- Vague assumptions
- Weak linkage to goals
- Unclear value realization
- Lack of urgency to act

Delivery

CONFUSING SCOPE[3]

- Overpromising risks
- Ambiguous deliverables
- Unclear responsibilities
- Shifting client's needs

LOW DELIVERABLE ADOPTION[4]

- Unclear enablement plan
- Lack of trainings or proper guidance
- Disconnection with users

ABANDONED DEALS[5]

- Client's ghosting
- Unclear buying signals
- Pricing mismatch

NON-COMPLIANCE[6]

- Regulatory violations
- Security risks
- Incomplete documentation

Source & Note: 1. Harvard Business Review; Gartner; McKinsey; 2. Harvard Business Review; Gartner; McKinsey; Winning by Design; Forrester; 3. McKinsey; Gartner; Forbes; 4. Juniper; Gartner; McKinsey; 5. Harvard Business Review; LinkedIn; McKinsey; 6. Research Gate; Gartner; McKinsey

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AI model solutions to drive the shift toward next-gen sales practices

RFQ

TAILORED RFQ RESPONSE[1]

- **Call summary using NLP** to obtain client's insights
- **Pain-point to solution mapping** using semantic search & LLM reasoning

TECHNICAL VALIDATION[2]

- **AI-driven feedback clustering** using unsupervised learning
- **Spec translation** using transformer model

CLEAR BUSINESS CASES[3]

- AI-powered **value calculators**
- **Strategic goal alignment models** via fine-tuned LLMs on industry data

Delivery

SCOPE CLARITY[4]

- **Auto-generated SoWs**[4] using LLM trained
- **Scope change detection** via AI-powered tracking

DELIVERABLE ADOPTION[5]

- **Personalized onboarding flows** using LLM-based content adaptation
- AI-powered **adoption risk alerts**

SIGNED CONTRACT[6]

- **Buyer intent scoring** with ML models analysis
- **AI-powered ghosting detection** & auto-nurture campaigns

COMPLIANCE[7]

- **Auto-generated audit documentation** via LLM summarization
- **Policy compliance checks** using AI engines

Source & Note: LLM = Large Language Model. 1. Gartner; LinkedIn; Bain; 2. Accenture; Google; 3. McKinsey; Gartner; Salesforce; 4. SoW = Statements of Work. Accenture; PwC; LinkedIn; 5. McKinsey; Salesforce; 6. Salesforce; Hubspot; 7. Deloitte; IBM

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Illustrations of high-impact AI core models to be adopted

01 Knowledge Representation & Reasoning

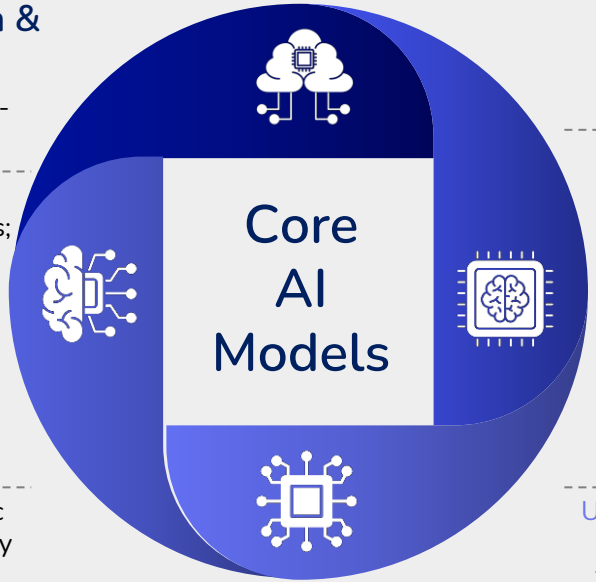
Encode domain knowledge in machine-readable form & apply logics over it

Use-cases: Model contractual relationships, obligations, & exceptions; supports automated rule-based compliance checking

02 NLP[2]

Enables machines to read, interpret, and understand text and speech

Use-cases: Identify and extract specific legal or regulatory terms; automatically classify content as compliant, etc.



Machine Learning[3] 03

Enable systems to learn from data without explicit programming

Use-cases: Detect deviations from expected behavior that may indicate potential non-compliance; predict risk areas in policy violation, etc.

LLMs[4] 04

Understands & generates human-like text based on large datasets

Use-cases: Create concise summaries of complex audit reports; classify large volumes of compliance documents into predefined categories, etc.

Source & Note: 1. KRR = Knowledge Representation & Reasoning. Ordfox; Telnyx; 2. NLP = Natural Language Processing. Endevsols; Spacy; Stanford; 3. Google Cloud; Research Gate; 4. LLMs = Large Language Models. Cornell University; Skim AI; World Journal of IT

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Our Perspectives

AI Adoption Case Studies

1. Tailored RFQ Response

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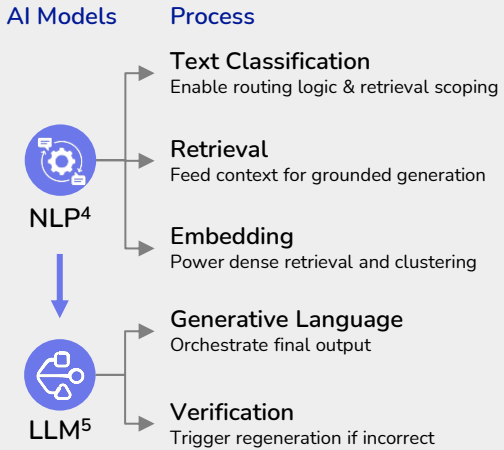
AI Use Cases in Tailored RFQ Response[1]

Issues	Complications	AI Solutions
Content Overload	Managing vast amounts of content results in difficulty in crafting cohesive proposals	AI-Powered Content Management
Time-Consuming Processes	Proposal creation involves repetitive tasks, consuming time on strategic thinking tasks	AI Automation by ML[2] Algorithms
Lack of Personalization at Scale	Generic responses to proposals that may not resonate with specific client needs	Generative AI customizes RFP[3]
Difficulty in Maintaining Compliance	Ensuring that proposals adhere to regulatory standards & policies is prone to human error	AI-Powered Compliance Check

Source & Notes: 1. Procurespark.ai; AutoRFP.ai; Inventive; Procure Insights; 2. ML = Machine Learning; 3. RFP = Request for Proposals; 4. NLP = Natural Language Processing; 5. LLM = Large Language Models

GenAI customizes RFP[1]

How it works



Value delivered

1. Automates repetitive content creation
2. Dynamically adapts tone & content to client's needs
3. Ensures responses align with policies

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Tailored RFQ Response

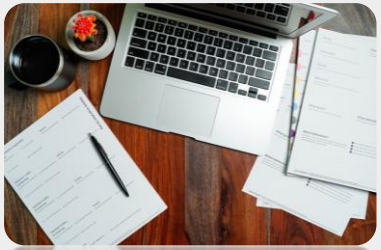
Workforce.com

Workforce.com is a global provider of workforce management software, specializing in solutions for scheduling, time tracking, payroll, HR, and compliance

Executive Summary

Workforce.com adopted AutoRFP.ai's AI-powered platform to streamline the workflow of time-consuming RFP[1] response processes and focus on strategic aspects and personalized content

Challenge



Inefficient RFP Response Process

Product Complexity

Complexity & long time spent on each proposal due to diverse products

Time Constraints

Manual proposal preparation was time-consuming

Multilingual Expansion

RFPs in multiple languages was resource-intensive

Strategic Focus

Repetitive tasks prevent teams from focusing on value-based responses

Sources & Notes: 1. RFP = Request for Proposal. Workforce.com; AutoRFP.ai

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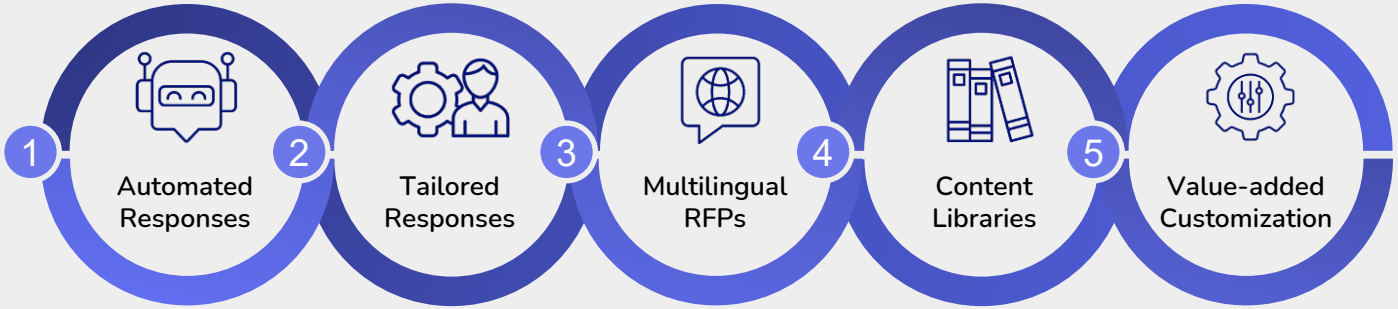
Solution

AutoRFP.ai

Generative AI instantly draft initial proposal responses

Transformer-based translation enables response accurately in 50+ languages

By offloading admin tasks to AI, executives focus valuable tasks



NLP[2] matched RFP questions with the most relevant previous answers

AI-powered semantic search and tagging algorithms classified content by topic

- Cut proposal preparation time
- Increase RFP response rate
- More tailored & compelling responses
- Enter new markets
- Improve RFP win rate

which resulted in...

Sources & Notes: 1. RFP = Request for Proposal. Workforce.com; AutoRFP.ai; 2. NLP = Natural Language Processing

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Impact

50%
Cut in proposal preparation time

2x
RFP[1] response rate

80%
Content match rate

1 Week
Time to integrate with current system

Sources & Notes: 1. RFP = Request for Proposal. Workforce.com; AutoRFP.ai

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Our Perspectives

AI Adoption Case Studies

2 Technical Validation

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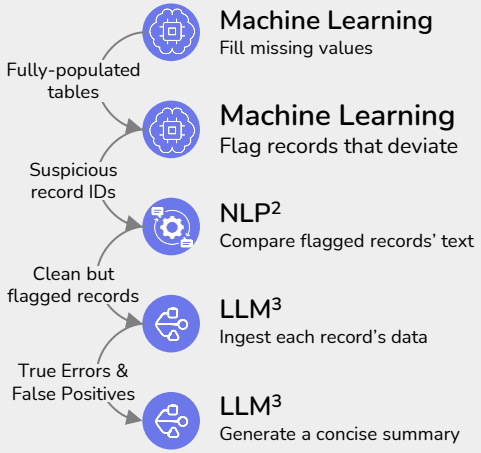
AI Use Cases in Technical Validation[1]

Issues	Complications	AI Solutions
Data Accuracy and Integrity	Inconsistent data from multiple sources leads to duplicate records, missing values, etc.	AI-Powered Anomaly Detection
Complexity of Underlying Systems	Sales reporting relies on complex tech stacks might lead to misconfigured pipelines, etc.	Conversational AI and Abstraction
Timeliness vs. Accuracy Trade-Off	Rigorous validation & real-time insights to respond to market shifts might delay report delivery	Real-Time Validation Models
Lack of Technical Literacy	Executives lack the technical background to data pipelines, BI tool configurations, etc.	Explainable AI and Dashboards

Source & Notes: 1. Springer Nature; Science Direct; Coralogix; Thematic; 2. NLP = Natural Language Processing; 3. LLM = Large Language Model

AI-Powered Anomaly Detection[1]

How it works



Value delivered

1. Improved data accuracy and integrity
2. Automated anomaly detection & compliance
3. Efficiency through continuous learning

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Technical Validation

Savills

Savills is a global real estate services firm that provides services in transaction advisory, consultancy, property management, and investment management

Executive Summary

Savills partnered with Leverton, a legal AI and PropTech company, to enhance proprietary platform “Knowledge”, enabling automated extraction & analysis of key property metrics from lease documents & providing reliable insights for clients

Challenge

Inefficient Lease Validation At Scale

Time-Consuming Data Entry

Manual data entry is labor-intensive, especially for portfolio managers

Inconsistent Data Extraction

Leases have complicated clauses, leading to difficulty in ensuring terms compliance

High Risk of Human Error

Human error is costly in lease admin & financial reporting

Limited Analytical Capabilities

Traditional methods lacked advanced analytics to process lease data effectively

Source: Savills; Artificial Lawyer; IPE Real Assets; Bisnow; Trellis; MRI

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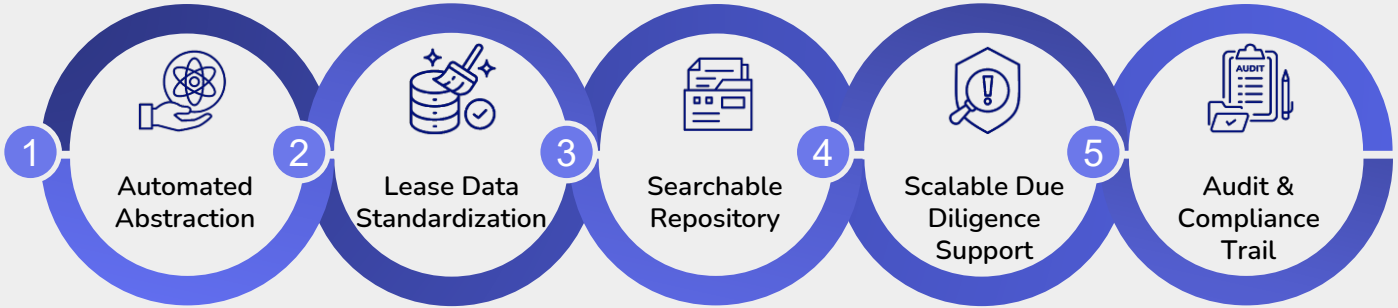
Solution

LEVERTON | Knowledge

Use OCR[1] & NLP[2] to digitize and extract key commercial & legal terms

Index extracted data into a semantic search engine

AI-based document control & meta-data tracking to create an audit trail



Recognize and normalize varied lease formats & terminology via ML[3]

Accelerate lease analysis with AI-driven bulk document processing

- Reduced lease abstraction review time
- Increased scalability in due diligence and client reporting
- Higher data accuracy and consistency

which resulted in...

Source: 1. OCR = Optical Character Recognition; 2. NLP = Natural Language Processing; 3. ML = Machine Learning. Savills; Artificial Lawyer; IPE Real Assets; Bisnow; Trellis; MRI

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Impact

30%
Reductions in time spent per lease document

70%
Fewer errors in extracted data

20%
Cost reduction in due diligence

1 Year
Time for piloting AI-powered platform

Source: Savills; Artificial Lawyer; IPE Real Assets; Bisnow; Trellis; MRI; PR Newswire; Cre Tech

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Our Perspectives

AI Adoption Case Studies

3 Clear Business Cases

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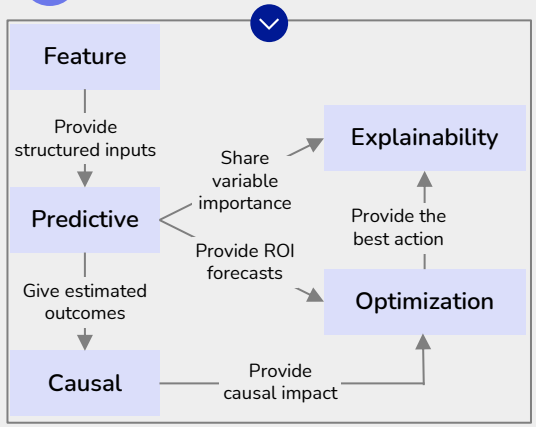
AI Use Cases in Clear Business Cases[1]

Issues	Complications	AI Solutions
Uncertain ROI Quantification	AI projects often have high upfront costs & uncertain returns due to variable adoption, data quality, or market dynamics	AI-Powered Predictive Analytics
Misalignment with Strategic Goals	Misalignment occurs when AI capabilities are not translated into strategic value	NLP-based Customer Interaction
Execution Risks and Complexity	AI adoption faces risks like data privacy breaches, integration failures with legacy systems, etc.	AI-Powered Reinforcement Learning
Stakeholder Skepticism and Resistance	Executives and employees doubt AI's reliability or fear cultural shifts (e.g., job displacement)	Computer Vision Models

Predictive Analytics[2]

How it works

LLMs[3]
Translate into understandable language



Value delivered

1. Enhanced data-driven decision-making
2. Improved operational efficiency & productivity
3. Increased customer satisfaction

Source & Notes: 1. McKinsey; IBM; Forbes; Deloitte; 2. Intellicus; True Project; 3. LLMs = Large Language Model

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Clear Business Cases

U.S. Bank

U.S. Bank is the large commercial bank known for strong risk management, digital innovation, and a customer-first approach; offering a full range of financial services across retail, corporate, etc.

Executive Summary

U.S. Bank's "Pay Yourself First" (PYF) initiative, developed in collaboration with fintech company Personetics, exemplifies the application of AI to improve financial wellness offerings and deliver measurable ROI through customer behavior changes[1]

Challenge

Customer Financial Uncertainty

Difficulty in Quantifying ROI[2]

Struggle to define tangible financial ROI[2] from exiting tools

Fragmented Customer Data

Siloed customer transaction data made it hard to build a unified business case

Competitive Pressure to Innovate

Justify investments in innovation to keep up with fintech

Misalignment on Value

Not all stakeholders were aligned on the commercial value of personalization

Source: 1. Personetics; Finextra; PR Newswire; U.S. Bank; FinTech News; 2. ROI = Return on Investment

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Solution

personetics® | Pay Yourself First

1. **Utilized Engage Platform** — Uses ML to analyze transactional data and deliver savings recommendations
2. **In-App Integrated AI** — AI feature was embedded into the mobile app for easy access
3. **Cash Flow Analysis** — AI analyzes transactional data to predict cash flow patterns
4. **Automated Savings Transfers** — Automatically transfers funds to savings accounts based on AI recommendations
5. **Added User Customization** — Customers adjust savings balancing automation with self-control

which resulted in...

- Enhanced customer engagement & satisfaction
- Improved customer savings habits
- Enhanced position in digital banking

Source: 1. Personetics; Finextra; PR Newswire; U.S. Bank; FinTech News

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Impact

10%
Increase in savings account deposits

15%
Increase in app usage

10%
Increase in cross-selling of saving products

4 Years
Length of time since adopting AI solution

Source: 1. Personetics; Finextra; PR Newswire; U.S. Bank; FinTech News

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Our Perspectives

AI Adoption Case Studies

4 Scope Clarity

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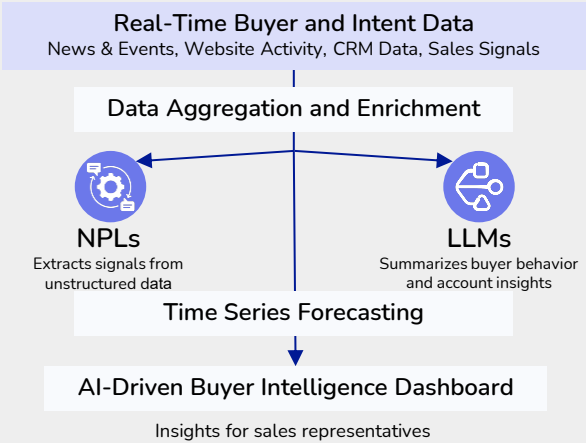
AI Use Cases in Scope Clarity

Issues	Complications	AI Solutions
One-size-fits-all Outreach And Discovery	Sellers miss the real scope, leading to mismatched solutions and stalled deals	LLMs-based Smart Outreach Generator
Poor Segmentation & Customer Profiling	Sales ends up chasing leads that aren't a good fit, wasting time and resources	LLMs-powered Dynamic ICP Builder
Misalignment Between Marketing & Sales	Sales receives leads that aren't ready or aligned with solution scope, leading to vague sales conversations	AI-based Lead Qualification Scoring Model
Lack of Contextual Buyer Insights	Makes it hard to tailor messaging or define project scope early in the funnel	AI-driven Buyer Intelligence Dashboard

Source: Sales Xceleration; HubSpot; Zbrain

Buyer Intelligence Dashboard

How it works



Value delivered

1. Real-time buyer insights
2. Smarter sales targeting
3. Faster deal progression

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Scope Clarity

Capgemini

Capgemini is a global leader in consulting, technology services, and digital transformation, operating in over 50 countries, with a focus on innovation and digital platforms

Executive Summary

Capgemini partnered with Aptivio to overcome scope clarity issues in sales, leveraging AI-powered buyer intent tools to identify hidden opportunities, enhance lead quality, and increase sales velocity globally

Challenge

Undefined Sales Targeting, Buyer Intent

Unclear Sales Scope

Struggled to define sales opportunities across vast product lines & markets

Fragmented Data Signals

Difficulty detecting meaningful buying signals due to scattered data sources

Low Tool Adoption

Existing tools lacked usability & integration, hindering widespread adoption

High Sales Costs

Manual lead qualification and inconsistent targeting inflated cost of customer acquisition

Source: Aptivio

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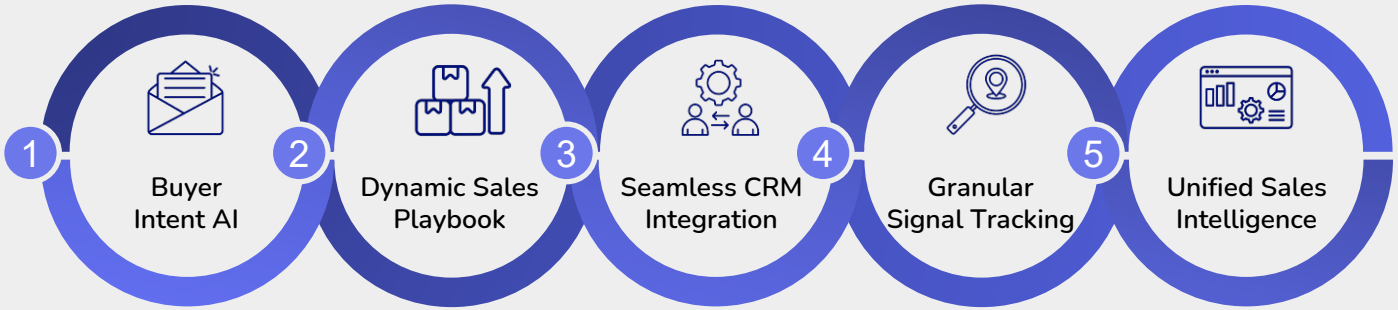
Solution

aptivio

Detected hidden buyer signals and prioritized high-intent leads

Integrated with Salesforce, Pardot, & digital ad tools for smooth workflow

All-in-one solution eliminated tool sprawl



Enabled AI-driven playbooks tailored to 39 product lines & 122 offerings

Provided deep visibility into keyword behavior, buying signals, & digital intent

- Clearer sales targeting scope and buyer journey visibility
- Streamlined internal adoption
- Enhanced collaboration between marketing and sales teams

which resulted in...

Source: Aptivio

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Scope Clarity

Capgemini

Capgemini is a global leader in consulting, technology services, and digital transformation, operating in over 50 countries, with a focus on innovation and digital platforms

Executive Summary

Capgemini partnered with Aptivio to overcome scope clarity issues in sales, leveraging AI-powered buyer intent tools to identify hidden opportunities, enhance lead quality, and increase sales velocity globally

Impact

40%
Increase in sales-ready leads

40%
More high-intent leads

4.8x
Increase in marketing-qualified leads

28,000
Pre-qualified opportunities detected

Source: Aptivio

Our Perspectives

AI Adoption Case Studies

5 Deliverable Adoption

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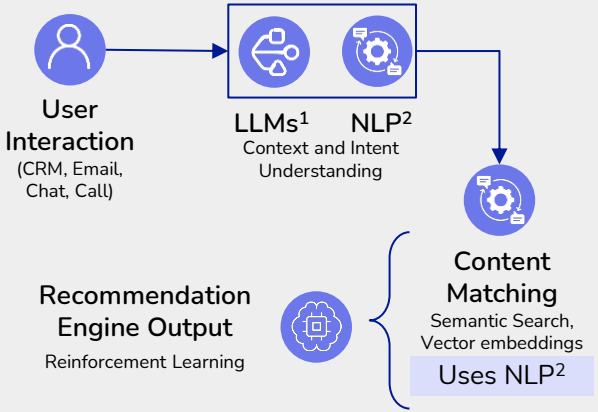
AI Use Cases in Deliverable Adoption

Issues	Complications	AI Solutions
Unclear Enablement Plan And Ownership	No defined owner or rollout strategy for deliverables like playbooks, pitch decks, etc.	AI-powered Content Recommendation Engine
Inconsistent or One-time Training	Teams are trained once (often during onboarding) but not as a recurring task that is essential	AI-driven Microlearning Coach
Poor Integration Into Daily Sales Tools	Deliverables aren't embedded in tools like CRM, email, or call platforms	LLM-based Copilot Extension
Lack Of Usage Visibility And Accountability	No tracking of which sales representatives are using what, when, or how	AI-powered Usage Tracker

Source & Note: Subex; TrackoBIT; CSA. 1. LLM = Large Language Model; 2. Natural Language Processing

AI-Powered Content Recommendation Engine

How it works



Value delivered

1. Faster content discovery
2. Personalized sales enablement
3. Improved deliverable adoption

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Deliverable Adoption

Meiji Yasuda

Meiji Yasuda Life Insurance Company is one of Japan's largest life insurers, committed to providing wellness & vitality across communities. It aims to transform into digitally-integrated insurer by 2030

Executive Summary

Meiji Yasuda partnered with Accenture to drive AI-led business reinvention, enhancing workforce productivity through AI-enabled digital assistants, advanced training & a data-driven platform to meet dynamic customer needs

Challenge

Personalization Adoption Bottleneck

Manual Workflows

Inefficient, manual processes limited speed and consistency in delivery

Low Digital Enablement

Employees lacked tools and training to fully adopt digital solutions

Limited Personalization at Scale

Struggled to deliver tailored customer experiences across a large salesforce

Slow Adaptation

Legacy systems hindered agility in addressing evolving business and community needs

Source: Accenture

Deliverable Adoption

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Executive Summary

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Solution

accenture

MY Palette – Agent

Personalized agents analyze customer data and local context to guide sales interactions

Upskilling initiative to build AI fluency, targeting 300 digital leaders

Flexible, data-driven system to adapt quickly to market needs

Simplifies real-time data entry during customer visits, reducing workload

Used for product development and proactive employee support

The core of this initiative is

- Improved service delivery and satisfaction
- Personalized recommendation to the customers
- Focusing on deliverable adoption

which resulted in...

Source: Accenture

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Deliverable Adoption

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Executive Summary

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Impact

36,000
Salespeople are currently using My Palette

300
Development of AI-fluent future leaders

5 Years
Engagement focused on AI transformation

Source: Accenture

Our Perspectives

AI Adoption Case Studies

6 Signed Contract

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AI Use Cases in Signed Contract[1]

Issues	Complications	AI Solutions
Legal Review Bottlenecks	Manual review and negotiation cycles delay contract closure, especially in complex deals	NLP-based Contract Analysis
Commercial Misalignment	Final contracts often diverge from negotiation, leading to revenue leakage, delivery conflicts, etc.	AI Clause Reconciliation
Risk vs. Speed Trade-Off	Pressure to close deals fast may lead to unfavorable or risky clauses being approved without thorough scrutiny	AI Risk Scoring Engine
Obligation Management Failure	Key contractual obligations are missed post-signature due to poor tracking, risking legal, etc.	AI-Driven Contract Lifecycle Management

Source & Notes: 1. Maruti Techlabs; Gartner; Forbes; World Economic Forum; 2. NLP = Natural Language Processing; 3. LLMs = Large Language Model

NLP-based Contract Analysis[1]

How it works

Rule-based NLP[2]
Prepares clean input for downstream models

Pretrained LLMs[3]
Provides embeddings & context for classification

Clause Classification
Works on top of embeddings from LLMs

Sequence Labelling
Stacked after LLM

Risk Scoring
Ingests structured output from NLP models

Value delivered

1. Accelerated deal velocity
2. Risk mitigation & compliance assurance
3. Improved strategic visibility & control

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Signed Contract

JPMorgan Chase

JPMorgan Chase & Co. is a leading American multinational financial services firm with operations in over 100 countries, offering a wide array of services across consumer & community banking, corporate & investment bank, etc.

Executive Summary

JPMorgan Chase implemented an AI-powered platform called COiN (Contract Intelligence) to automate the analysis of complex legal documents using machine learning and natural language processing, dramatically reducing the need for manual legal review

Challenge

Barriers to Fast and Trustworthy Contract Signing

Manual Contract Review

Time-consuming commercial agreements review is prone to delays

High Error & Compliance Risks

Manual review was susceptible to inconsistency in interpreting complex clauses

Stakeholder Resistance & Pushback

Stakeholder fears of integration challenges with legacy systems

Scalability & Competitive Pressure

Pressure to scale contract processing & be competitive in a data-rich financial sector

Source: LinkedIn; Britannica; McKinsey; Digital Defynd; SDS; IJSRET; CTO Magazine; Welflab

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Executive Summary

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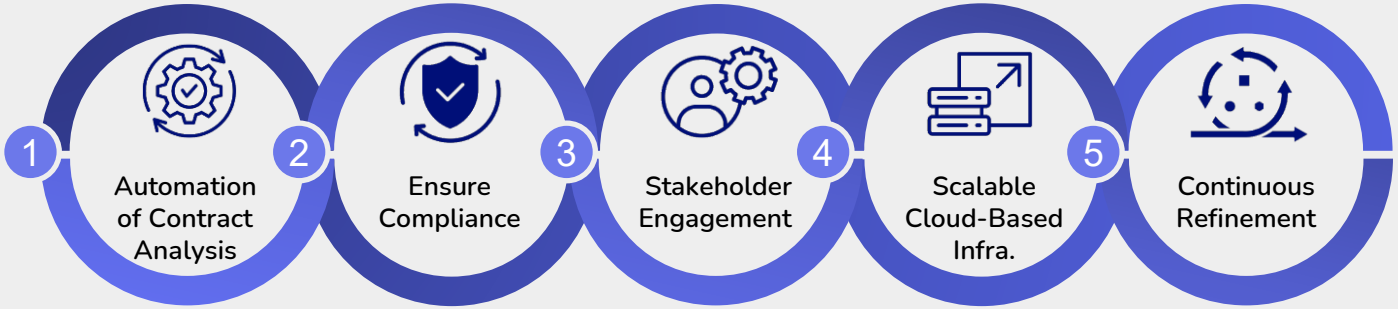
Solution

JPMorganChase | Contract Intelligence

Uses NLP[2] and unsupervised ML[3] to extract 150 attributes from complex documents

CoE[4] for Intelligent Solutions to foster adoption among teams

Continuously use new data to maintain accuracy & adaptation



Use image recognition and ML[3] to categorize contract attributes

Deploy on AI-based cloud infra., scaling processing of contracts

- Time and cost savings
- Improved contract accuracy and compliance
- Enhanced stakeholder alignment and productivity

which resulted in...

Source: LinkedIn; Britannica; McKinsey; Digital Defynd; SDS; IJSRET; CTO Magazine; Welflab; 2. Natural Language Processing; 3. ML = Machine Learning; 4. CoE = Center of Excellence

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Impact

5%
Inconsistency detected in loan agreements

360K
Hours of manual review reduced to seconds

12K
Commercial agreements analyzed p.a.[1]

8 Years
Length of time since adopting AI solution

Source: LinkedIn; Britannica; McKinsey; Digital Defynd; SDS; IJSRET; CTO Magazine; Welflab; 1. p.a. = per annum

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Our Perspectives

AI Adoption Case Studies

7 Compliance

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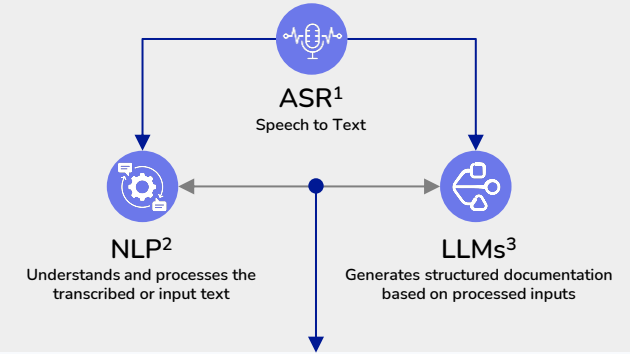
AI Use Cases in Compliance

Issues	Complications	AI Solutions
Fragmented Regulatory Understanding	Teams implement compliance standards differently, leading to increasing non-compliance	LLM-Based Compliance Knowledge Assistant
Manual & Incomplete Documentation Processes	Policies, audits, and logs are manually maintained or inconsistent	AI-Powered Auto-Documentation Tool
Inconsistent Policy Enforcement Across Regions	Global orgs may apply different levels of rigor in compliance, leading to wrong understanding	AI-Driven Compliance Monitoring Dashboard
Lack Of Real-time Incident Detection And Escalation	Many issues are identified after damage is done (e.g., data leaks, misuse of confidential info)	AI-Based Real-Time Threat Detection

Source: Overloop AI , Argenti , AllianceTek; 1. ASR = Automatic Speech Recognition; 2. Natural Language Processing; 3. LLM = Large Language Model

AI-Powered Auto-Documentation Tools

How it works



Augments documentation by pulling relevant data from knowledge bases

Value delivered

1. Consistent, high-quality documents
2. Massive time and cost savings
3. Real-time knowledge capture

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Compliance

Fintech Co.[1]

The client is a US-based fintech startup focused on building compliance-driven solutions that streamline legal document management by automating regulatory checks

Executive Summary

A US-based fintech startup partnered with Innowise to develop an AI-powered compliance system that automates document checks, improving regulatory adherence, reducing manual errors

Challenge

Manual Compliance Bottlenecks

Manual Review

Legal teams spent excessive time manually scanning large volumes of contracts

Compliance Risks

Human error & evolving regulations increased the risk of non-compliance

Inefficient Editing

Manually identifying & correcting compliance issues slowed down finalization

Lack of Auditability

Limited traceability & version control reduced accountability and complicated audits

Source & Note: 1. The company name is undisclosed. innowise

Compliance

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Executive Summary

A US-based fintech startup partnered with Innowise to develop an AI-powered compliance system that automates document checks, improving regulatory adherence, reducing manual errors

Solution

innowise

1. **AI-Contract Processing** — AI scans and validates contracts against current regulations, reducing manual effort
2. **Compliance Optimization** — Generates and edits contracts based on dynamic templates aligned with current standards
3. **Smart Template Management** — Standardizes contract structures to reduce inconsistencies and simplify
4. **Critical Clause Identification** — AI identifies risky clauses and deal-breakers, allowing legal teams to act proactively
5. **Blockchain Transparency** — Blockchain-based architecture ensures auditability, traceability, and secure document handling

- Reduced manual workload for legal teams
- Enhanced document accuracy and compliance
- Improved auditability and data traceability

which resulted in...

Source & Note: 1. The company name is undisclosed. innowise

Compliance

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Executive Summary

A US-based fintech startup partnered with Innowise to develop an AI-powered compliance system that automates document checks, improving regulatory adherence, reducing manual errors

Impact

58%
Increase in document management speed

71%
Improvement in compliance transparency

7 months
Project duration for impact delivery

Source & Note: 1. The company name is undisclosed. innowise

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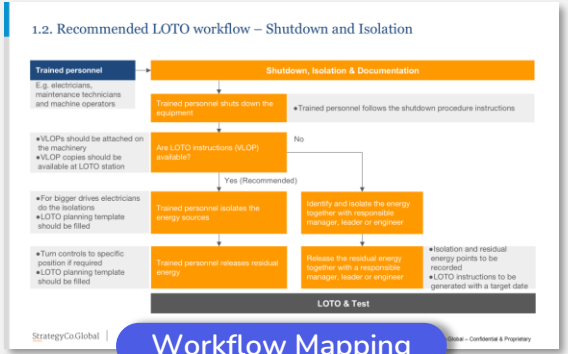
How SprintlyWorks Can Help

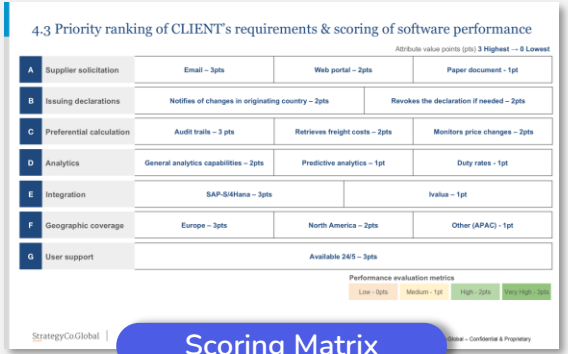
Methodologies

1. Understand	2. Scout	3. Evaluate	4. Shortlist	5. Implement
• Identify use-cases of AI to automate workflow • Gather business requirements and evaluation criteria	• Conduct a market scan to compile a long list of suitable AI solutions • Conduct a high-level analysis of the product capability & usability	• Perform detailed analysis of all identified solutions • Compute scoring matrix based on business requirements	• Conduct workshop to shortlist most potential solutions • Support in writing RFIs document • Design pilot program	• Design detailed implementation and change management plan • Provide PMO support to monitor implementation and address bottlenecks

Tools & Enablers



Workflow Mapping



Scoring Matrix

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We helped ManufacturingCo. build processes for sales team to sell transformation projects to customers in a consultative way

ABOUT OUR CLIENT

- Manufacturing Co.,is a solution provider for energy management to paper machine operations.
- Until now, they have not actively sold enterprise wide digital transformation sales due to its product oriented way of selling.

OUR CLIENT NEEDS

REDEFINE SALES PROCESS FOR TRANSFORMATION SOLUTIONS

- They aim to renew their sales process to become a digital transformation partner for its customers.
- Include & evolve into a consultative-based selling in the process.

BUILD KNOWLEDGE OF SALES TEAM FOR NEW SALES PROCESS

- Manufacturing Co. wanted to understand how they should engage with customers for digital transformation projects.
- Identify requirements to enable transformation services sales.
- Identifying key components of the preparation material for the sales team.

OUR APPROACH

Hypothesis creation for proactive sales process

The team **conducted interviews with senior executives of Manufacturing Co.** to understand customer decision making criteria for their sales experience. List best practices used for a consultative-based sales process & hypothesis for each profile.

Map customer decision journey

The **team mapped customer's current digital journey with a focus on ongoing digital initiatives**. This brought awareness about the customer's current digital environment to sales team. Created a pre-sales meeting, research methodology for sales.

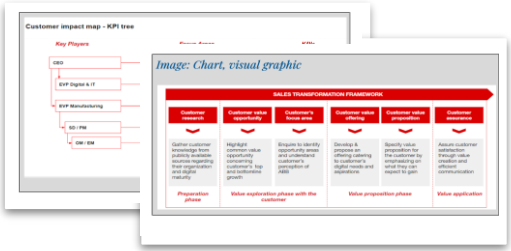
Validate new process with sales team on customer cases

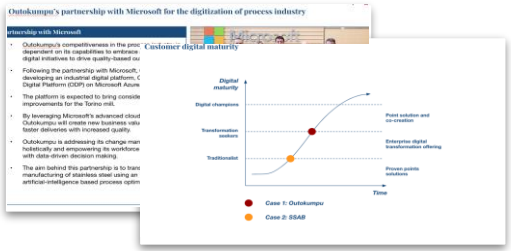
We **developed a sales framework for enterprise transformation scenarios**. The framework was designed to work as a preparation guide for Manufacturing Co. sales team to aid in customer meetings..

OUR DELIVERED VALUE

1 **3X more effective pre-sales** research process

2 **25% higher engagement** in customer meetings





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We helped Heavy EquipmentCo review and optimize their internal sales process to better meet customer needs

ABOUT OUR CLIENT

- Large industrial equipment manufacturer is reviewing their service sales processes .
- Client wants to understand how the process of their account managers can be better matched to the purchase process of their customers to improve customer retention.

OUR CLIENT NEEDS

A THOROUGH REVIEW OF THEIR INTERNAL SALES PROCESSES

- Client seeks to identify and relieve bottlenecks hindering account managers in their daily work, causing disruptions in the service they are able to provide to their customers.

IMPROVED UNDERSTANDING OF THE CUSTOMER PURCHASING PROCESS

- In order to better target the account manager sales efforts, the client needs a better view of what stakeholders are involved in the purchasing process, what their interests are and what they miss in the service provided by the client

OUR APPROACH

Internal review

Through 30+ account manager interviews, we mapped the account manager sales process to the highest possible degree of granularity, ¨detailing each step with information on support systems, stakeholders and decision-tree outcomes

External review

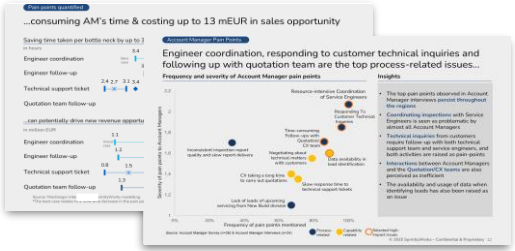
By interviewing 10+ customers, we collected detailed information about their purchasing & decision making process, detailing approval hierarchies, stakeholders & their KPIs, as well as the bottlenecks the customers percieve

Synthesis

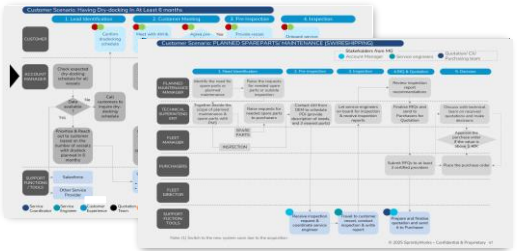
By comparing the internal and external perspectives, we were able to identify frictions that cause gaps in the service provided to customers. We recommended improvements in the current sales process, but also in the current account manager training, in order to improve service.

OUR DELIVERED VALUE

1 Identified bottlenecks costing the client up to **13m € annually.**



2 Detailed insight into customer decision-making process



We helped Power Co. create its sales process & customize CRM for the new market

ABOUT OUR CLIENT

- Power Co. is a green energy production company.
- Power Co. had begun the sales of its solar products but faced a challenge of low customer adoption rate.
- It utilized external telesales agency for the sales & product installations.

OUR CLIENT NEEDS

DEFINE SALES PROCESS FOR NEW SOLAR PANEL SALES

- Power Co. sought to define the sales process to identify early in the customer journey if a potential customer will purchase the product or not & to contextualized for local needs.

IDENTIFY CUSTOMIZATION REQUIREMENTS FOR CRM

- PowerCo. aims to customize their existing CRM system to meet the requirements of the new market as they expand their product offering.
- Create list of requirement for CRM software customization.

OUR APPROACH

Current state analysis of existing sales process

The team conducted stakeholder interviews to **map the local market sales process from Lead-to-Order, extracted high-level sales stages,** data-flow document in which all the important data points in each sales stage are documented.

Build CRM customization requirements

The team then created a **high-level layout of the CRM environment**, with automation plans to accelerate the sales process from lead-to-order. Created a list of customization requirements for the CRM, which was transferred to backlog.

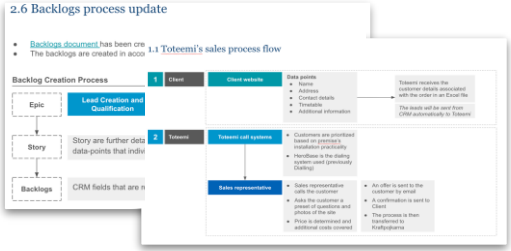
Provide improvements to the CRM structure

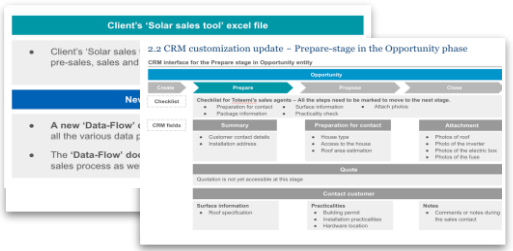
The team **conducted pilot of the customized CRM environment, enabling faster lead-to-order processing** and increased sales efficiency. Implemented an agile working method to ensure that the questions were answered.

OUR DELIVERED VALUE

1 **3X faster sales process** from lead-to-offer

2 **+4 months** of team time saved





We helped Factory Co. identify value to stakeholder & use-cases of their new customer portal and build vision for the customer adoption

ABOUT OUR CLIENT

- FactoryCo. aimed to launch a self-service customer portal for its customers worldwide to achieve prompt customer services and improve customer satisfaction.
- SprintlyWorks goal was to create a comprehensive list of use-cases and a proposed vision and roadmap for portal.

OUR CLIENT NEEDS

UNDERSTAND STAKEHOLDERS FACTORS OF PORTAL ADOPTION

- Factory Co. aims to understand concerns stakeholders have in the change & adoption of self-service portal.
- Understand the use-case of the portal and mapping it in customer journey

BUILD SHARED VISION, MISSION, PURPOSE OF THE NEW PORTAL

- Factory Co, wanted to build vision of the product to communicate it to the internal stakeholders & customers.
- Identify value proposition that can ease the organization wide adoption of the portal.

OUR APPROACH

Build customer journey map & identify use-cases

The team **conducted internal stakeholder & customer interviews to** list use cases of the customer portal and hindrance factors for the adoption by each stakeholder. We detailed customer journey to identify needs of new features in the portal.

List demand driving factors for the adoption

The team **listed challenges of stakeholders which drives the need of the self-service portal** along with potential solution that the new portal can address. Built 2x2 matrix to understand solution impact on customer vs ease of implementation.

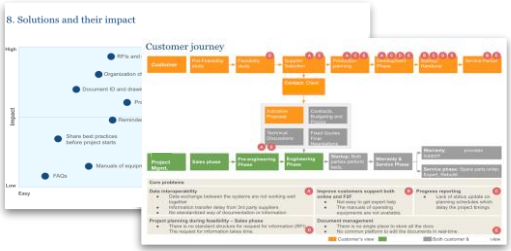
Identify vision & value proposition, prioritize features

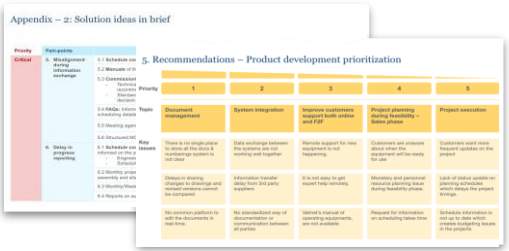
We **built a shared vision, strategy & key actions** for the portal to ease the adoption. Some key strategy such as 'Transform teams work with one communication' Provided recommendations on the product development & prioritization of customer issues.

OUR DELIVERED VALUE

1 Analyzed **20+ customer journey** interactions for the tool

2 Recommended **5 strategies for the customer adoption** & product development





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We helped Tissue Co. reduce safety risk at its plants by creating a risk assessment tool and implemented LOTO

ABOUT OUR CLIENT

- Tissue Co. experienced fatal accidents and high worker safety incidents, with a high Lost Time Accident Frequency (LTAF) score
- The existing risk assessment process was inadequate in preventing these incidents

OUR CLIENT NEEDS

DEVELOP RISK ASSESSMENT TEMPLATE TO IMPROVE SAFETY

- TissueCo. aimed to enhance worker safety by developing a user-friendly risk assessment template for paper machine hazards
- They aim to implement lockout and Tagout (LOTO) in its factories

BENCHMARK INDUSTRY BEST PRACTICES FOR LTAF

- Hygiene Co. wanted to understand how companies with low LTAF implemented risk assessment tools and Lock-out-tag-out
- Best practices and learnings from assessment tools and LOTO implementation
- Identify new digital solutions for LOTO

OUR APPROACH

Benchmark occupational health & safety standards

The team **benchmarked three different widely used occupational health & safety standards and extracted the relevant safety features from them.** These standards provided the 3 steps of risk assessment.

Create risk assessment process for Tissue Co.

To determine the best practices in risk assessment, **the team compared the current standards of Tissue Co., against other companies with lower LTAF**. This analysis helped optimize risk categories for template.

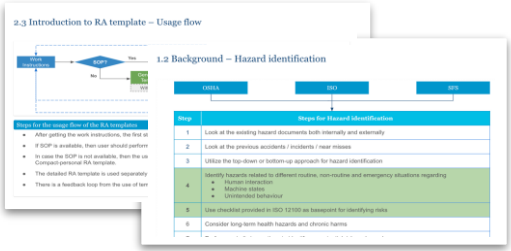
Pilot risk assessment template

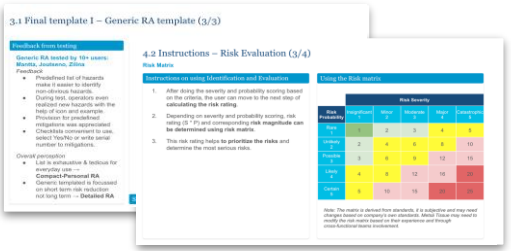
The team conducted interviews and in-depth analysis. **Provided key features and components of the risk assessment template.** Risk assessment template was user-tested in two manufacturing locations.

OUR DELIVERED VALUE

1 Identified **root causes for LTAF**

2 Piloted risk assessment tool at **2 manufacturing locations**





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We helped Chemical Co. digitalize the logistics tendering process by identifying digital solution and reduce manual process

ABOUT OUR CLIENT

- ChemicalCo. imports goods from multiple geographies & tenders it to transportation providers
- It rolls out tenders for logistics and performs data analysis on the received bids
- Entire exercise is currently done manually

OUR CLIENT NEEDS

UNDERSTAND TYPES OF TOOLS AVAILABLE IN THE MARKET

- Chemical Co. sought a digital solution to streamline logistics service tendering process and perform advanced analytics
- It wanted the tool to be able to handle all its requirements and integrate with IT systems

ASSESS TOOL'S CAPABILITIES TO SIMPLIFY THE PROCESS

- ChemicalCo. wanted to assess the complexity, implementation timeline, and costs associated with tool
- Additionally, it sought to understand features in the tool meant for logistics tendering and number of users that can utilize the tool globally

OUR APPROACH

Define solution requirements from Chemical Co.

Created comprehensive **list of must-have and nice-to-have** for the solution by conducting stakeholder interviews. Analyzed current Excel data to understand the data structure that the tool will be processing.

Conduct digital solution scout based on needs

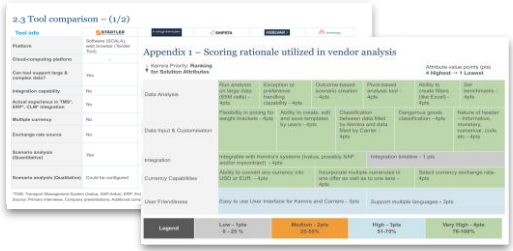
Scouted 40 available digital solutions in the selected market. The team conducted in-depth demos with 20 vendors to understand tool features. Shortlisted suitable fits on the basis of client requirements.

List final tools & guide for implementation

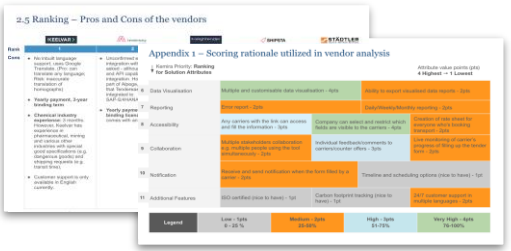
We finalized **5 potentially fit tools on the basis of systematic evaluation** & scoring of the vendors. Conducted further vendor demo sessions with clients and provided recommendations on the guidelines to implement the solution with current supply chain.

OUR DELIVERED VALUE

1 Scouted **40+ tendering solution** as potential softwares



2 Ranked **5 softwares** on the basis of cost, timeline, pros & cons



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We helped Water Co. identify a digital solution for inventory optimization to balance supply demand needs and reduce manual data input work

ABOUT OUR CLIENT

- Water Co., a leading provider of sustainable freshwater tech, sought to identify a digital inventory tool to optimize order sizes and reorder levels
- This initiative aimed to enhance inventory mgmt. by utilizing historical & forecasted demand data

OUR CLIENT NEEDS

UNDERSTAND TYPES OF TOOLS AVAILABLE IN THE MARKET

- Food Co. faced a disconnect between supply and demand, specifically between sales orders and purchase orders. Manual processes were time-consuming, and there was a lack of visibility in batch management

ASSESS TOOL'S CAPABILITIES TO SIMPLIFY THE PROCESS

- Water Co. aimed to assess the complexity, implementation timeline, and costs associated with a new digital inventory tool
- It sought to reduce the current manual tasks (e.g., update inventory details in ERP, create purchase orders in Excel) by leveraging new tool

OUR APPROACH

Define solution requirements from Water Co.

Created comprehensive **list of must-have and nice-to-have** for the solution by conducting stakeholder interviews. Understand challenges such as lack of visibility in batch management, inventory age, soft/hard stock allocation, lack of demand forecast.

Conduct digital solution scout based on needs

Scouted 32 available digital solutions in the selected market. The team conducted in-depth demos with the vendors and shortlisted suitable fits on the basis of cost, timeline, pros & cons, ability to cover client's maximum requirements.

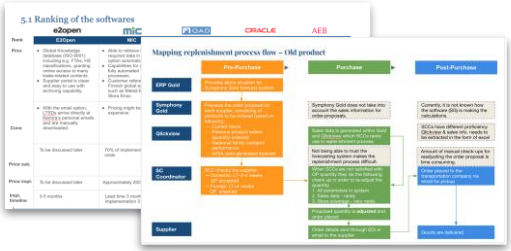
List final tools & guide for implementation

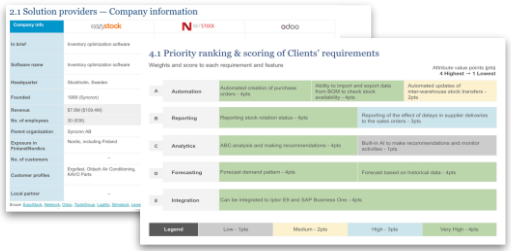
We finalized **6 potentially fit tools on the basis of systematic evaluation** & scoring of the vendors. Conducted further vendor demo sessions with clients and provided recommendations on the guidelines to implement the solution with current ERP.

OUR DELIVERED VALUE

1 Scouted **32+ inventory optimization tools** as potential softwares

2 Ranked **6 softwares** on the basis of cost, timeline, pros & cons





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We helped Chemical Co. identify digital solution for preferential trade and free trade agreement (FTA) process to reduce manual time and several excel files

ABOUT OUR CLIENT

- Chemical Co. aims to identify potential preferential trade software to support preferential trade & FTA process. Minimizing human errors & manual work
- The scope of the project was primarily two regions namely EMEA and North America

OUR CLIENT NEEDS

UNDERSTAND TYPES OF TOOLS AVAILABLE IN THE MARKET

- Identify the digital tools available in the selected market for automating FTA process
- Understand tool's interface, ability to meet Chemical Co.'s requirements, CS needs

ASSESS TOOL'S CAPABILITIES TO SIMPLIFY THE FTA PROCESS

- Chemical Co. wanted to assess the complexity, implementation timeline, and costs associated with tool
- Additionally, it sought to rank the potential vendors on their automation capability in simplifying the manual processes

OUR APPROACH

Define solution requirements from Chemical Co.

Created comprehensive **list of must-have and nice-to-have** for the solution by conducting stakeholder interviews. Understand challenges for the FTA process. The team identified that current process is manual with extensive reliance on excel records.

Conduct digital solution scout based on needs

Scouted 30 available digital solutions in the selected market. The team conducted in-depth demos with the vendors and shortlisted suitable fits on the basis of cost, timeline, pros & cons, ability to cover client's maximum requirements.

List final tools & guide for implementation

We finalized 5 potentially fit tools on the basis of systematic evaluation & scoring of the vendors. Conducted further vendor demo sessions with **clients and provided recommendations, and** guiding the Global Trade Operations team in FTA process.

OUR DELIVERED VALUE

1 Scouted **30+ preferential trade solutions** as potential softwares

2 Ranked **5 softwares** on the basis of cost, timeline, pros & cons

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Answer Big Questions & Deliver Sustainable Impact

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Let’s connect.

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