2025 SBI SPRING REGIONAL SUMMIT   MAY 13-14, 2025 ATLANTA, GEORGIA

BLUEPRINT
for Sustainable Growth

SBI | Driven by Insights Delivered from Experience
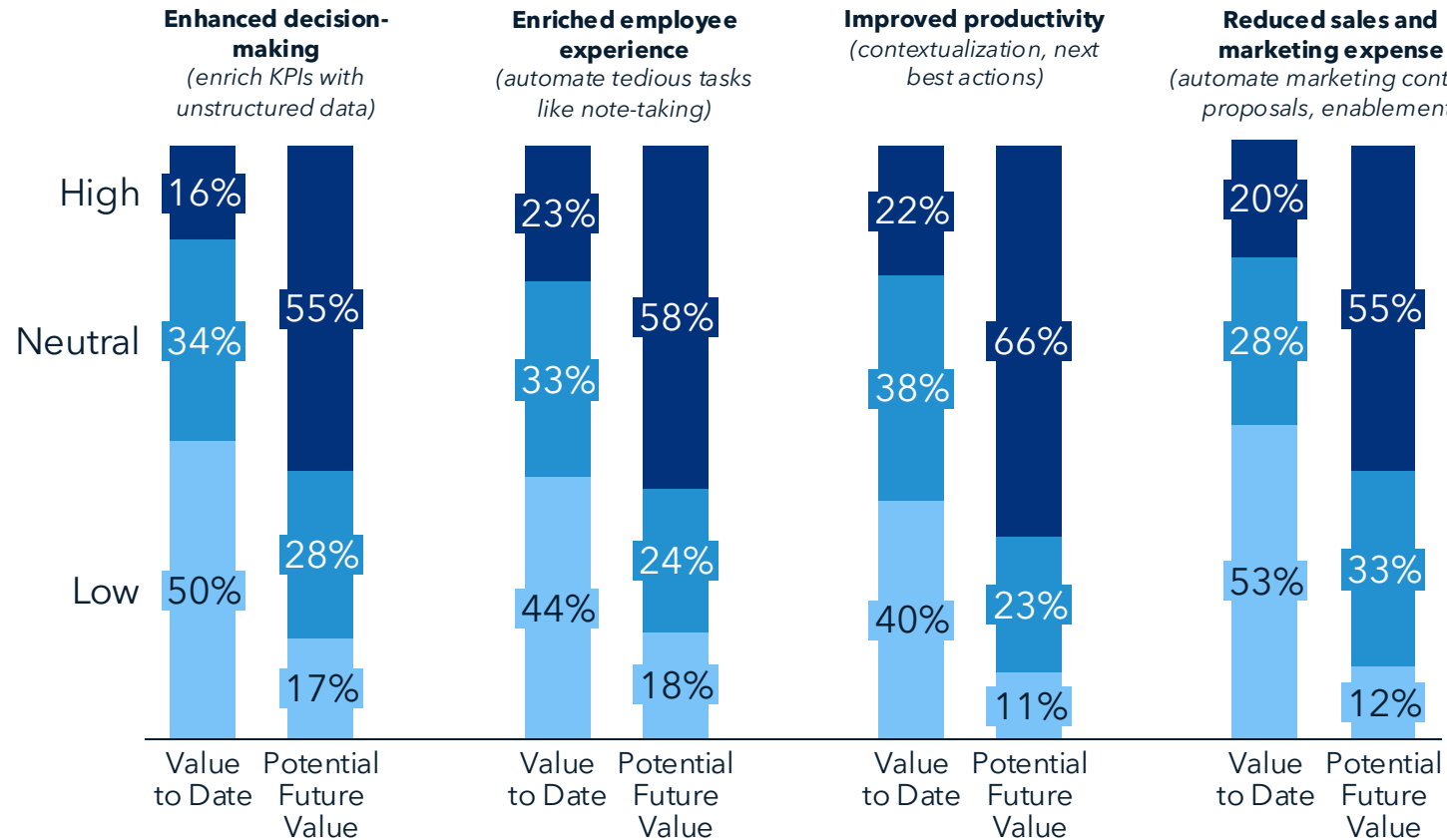Growth Advisory

1

Driving Frontline AI Adoption to Improve Sales Performance

Ray Makela (SBI) and Brian Quinn (Restaurant Technologies)

Most see potential for AI, but few are currently realizing it

CEO Ratings of the Value Creation Potential, and Performance so Far, for Artificial Intelligence
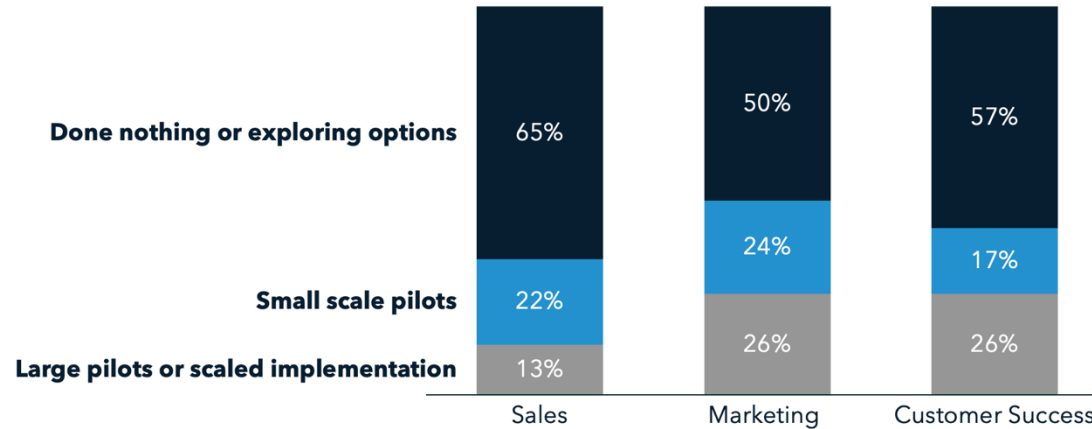

Enhanced decision-making
(enrich KPIs with unstructured data)

Enriched employee experience
(automate tedious tasks like note-taking)

Improved productivity
(contextualization, next best actions)

Reduced sales and marketing expense
(automate marketing content, proposals, enablement)

High — Neutral — Low

Enhanced decision-making:
- Value to Date: High 16%, Neutral 34%, Low 50%
- Potential Future Value: High 55%, Neutral 28%, Low 17%

Enriched employee experience:
- Value to Date: High 23%, Neutral 33%, Low 44%
- Potential Future Value: High 58%, Neutral 24%, Low 18%

Improved productivity:
- Value to Date: High 22%, Neutral 38%, Low 40%
- Potential Future Value: High 66%, Neutral 23%, Low 11%

Reduced sales and marketing expense:
- Value to Date: High 20%, Neutral 28%, Low 53%
- Potential Future Value: High 55%, Neutral 33%, Low 12%

N = 120
Source: SBI Q4 2024 CEO Survey

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3

# AI progress in go-to-market has been limited, but scaling happens fast

Generative AI Utilization
Across the GTM organization

Done nothing or exploring options
Small scale pilots
Large pilots or scaled implementation

	Sales	Marketing	Customer Success
Done nothing or exploring options	65%	50%	57%
Small scale pilots	22%	24%	17%
Large pilots or scaled implementation	13%	26%	26%

N = 120
Source: SBI Q4 2024 CEO Survey

CEOs Reporting Large-Scale Pilots or Scaled Implementation of Generative AI
Q1 2024 vs Q4 2024

Q1 2024 ■ Q4 2024 ■

	Sales	Marketing	Customer Success
Q1 2024	6%	15%	0%
Q4 2024	13%	26%	26%
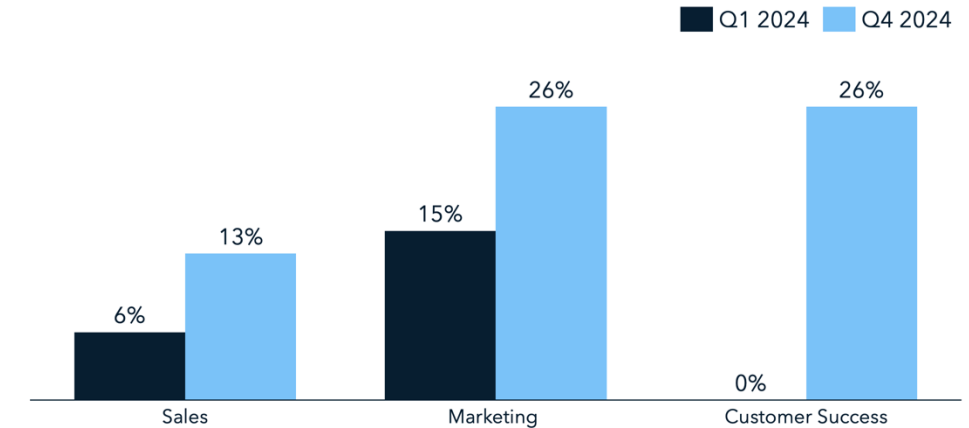
N = 120
Source: SBI Q4 2024 CEO Survey

01 **AI Strategy at Restaurant Technologies**

AI across the customer lifecycle: driving value and culture

VCR

| Strategic Pricing |
| Forecasting |
| Lead & Opportunity Scoring |
| Remote Troubleshooting |

Awareness & Interest → **Discover & Build Value** → **Prove Value** → **Review Contract** → **Customer Onboarding** → **Support**

AI-First Culture

| Sales Playbook |
| Sales Assistant |
| Enhanced Prospecting |
| Case & Survey Summaries |

Targeted AI use cases, aligned with our core pillars, impact every stage of the customer lifecycle

02 AI Charters

Predictable layers of growth AI charter (forecasting)

Strategic Priorities	AI Contribution	Rollout	Outcomes
Strategic Objective	**How AI Will Help Solve the Problem**	**Where/ How We Will Pilot**	**Anticipated Timeline**
Predictive growth from sales funnel to anticipate resource demands and align supply channels	Train AI on attributes within Sales Pipeline to better predict wins based on Sales Segment, Seller Win Rates, Customer Activity etc.	Configure Einstein Forecasting in SF Sales Cloud	• Configure & Deploy v1 in Q3 • Refine in 1H 2026 as needed
Desired End State	**Tools/ Applications to Use**	**Markers of Success**	**Value Created**
Longer-Range, More Accurate Ink Forecast to better Inform S&OP 6 month and 12 month Install model	Salesforce Einstein Forecasting	• Improve 3-month Ink Forecast Accuracy to 90% & • Improve 6-month Ink Forecast Accuracy to 80%	Accurate sales forecasting that will feed S&OP distribution

03

AI Use Cases through Sales Assistant Charter

02   Build an AI First Culture

AI-first culture: guiding principle and strategic pillars

Guiding Principle = Connect Learning to Earning

Leadership Commitment

- Alignment with Overall Business Goals & Objectives
- Establish Communication Routines

Education & Training

- AI E-Learning & Cert & Instructor Workshops
- Persona Based – No One Size Fits All

Experiment & Evolve

- Early Adopter Focus Groups
- Social Learning through Grass-Roots Engagements
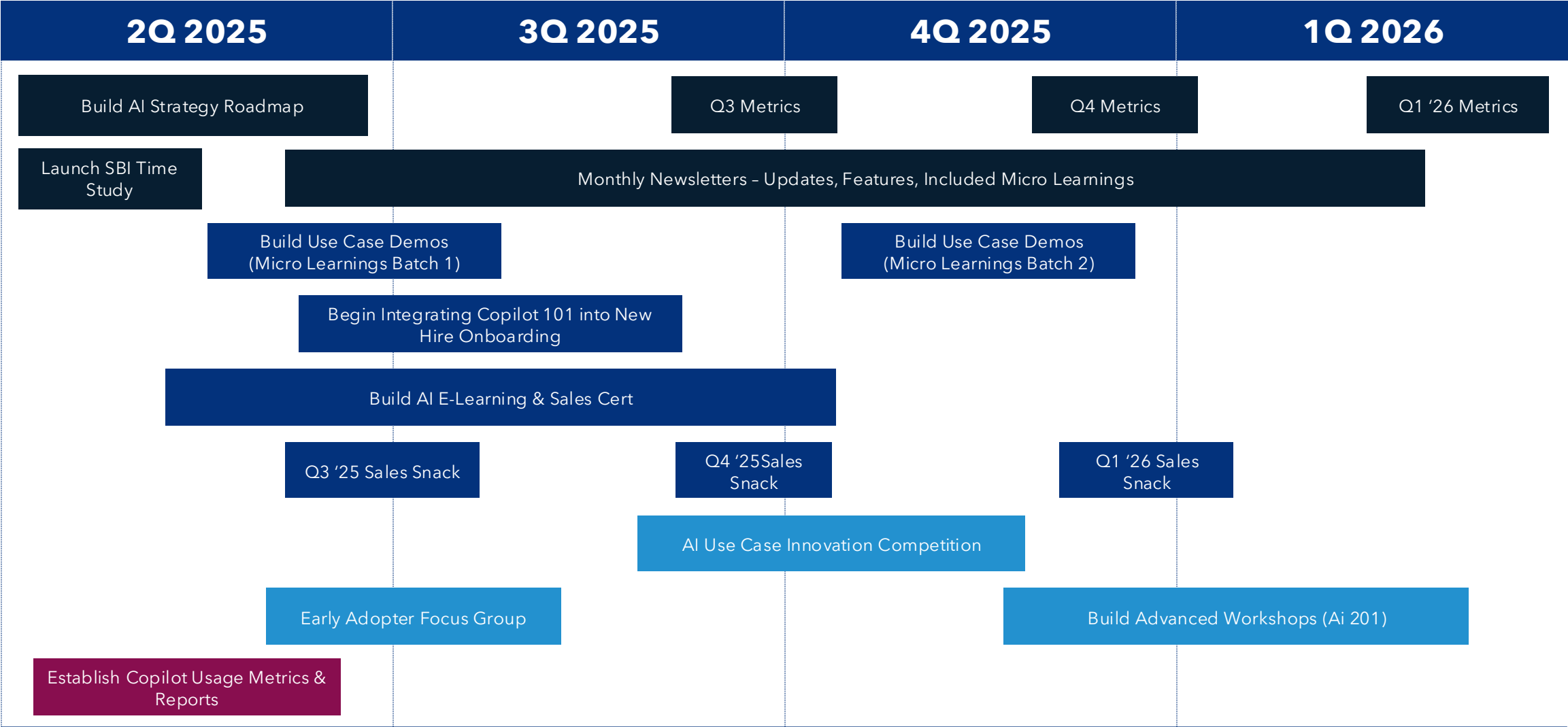- New Feature/Capability Research & Testing
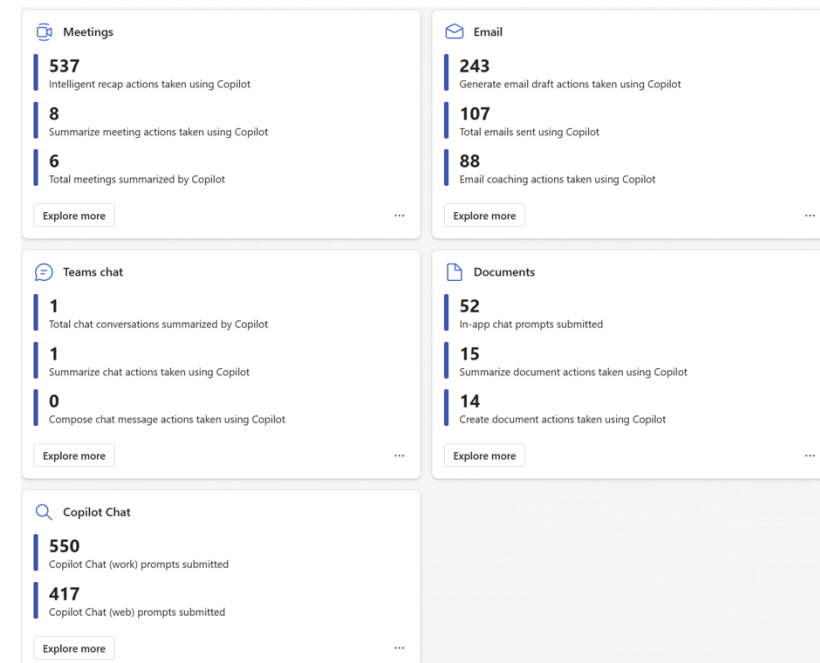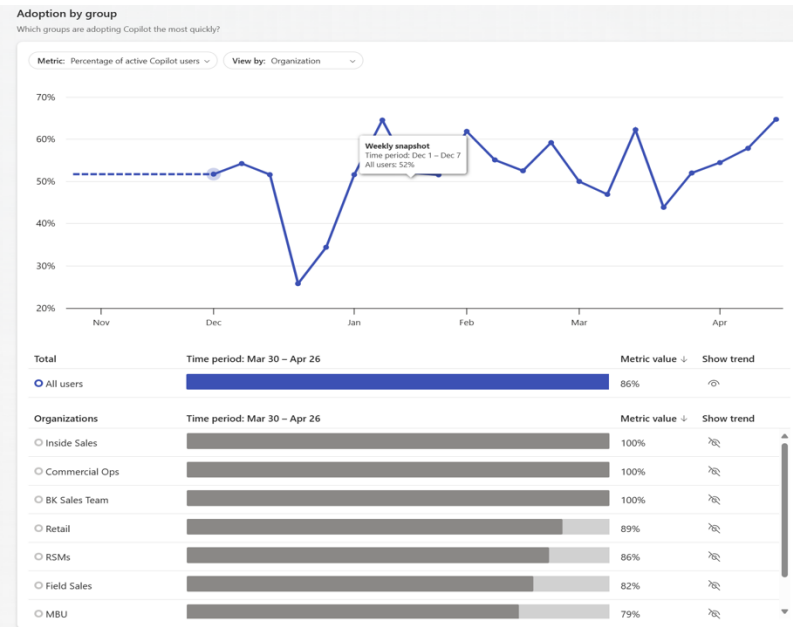
Measure & Govern

- Data-Driven Adoption Metrics
- Access Controls, Usage Standards & Data Governance

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AI roadmap and tactics

Key	
Leadership Commitment	Education
Experiment & Evolve	Measure Impact

2Q 2025	3Q 2025	4Q 2025	1Q 2026
Build AI Strategy Roadmap	Q3 Metrics	Q4 Metrics	Q1 '26 Metrics

Launch SBI Time Study

Monthly Newsletters – Updates, Features, Included Micro Learnings

Build Use Case Demos (Micro Learnings Batch 1)

Build Use Case Demos (Micro Learnings Batch 2)

Begin Integrating Copilot 101 into New Hire Onboarding

Build AI E-Learning & Sales Cert

Q3 '25 Sales Snack

Q4 '25 Sales Snack

Q1 '26 Sales Snack

AI Use Case Innovation Competition

Early Adopter Focus Group

Build Advanced Workshops (Ai 201)

Establish Copilot Usage Metrics & Reports

Lessons learned to date

- **Dual AI Focus (i.e. "Two Sides of the Coin"):** To effectively navigate the complexities of AI, address it from two distinct yet interconnected perspectives: Value Creation (building outcome driven organizational capabilities and use cases) and Culture Building (fostering an AI-first mindset and company-wide literacy for sustained impact)

- **Integrate, Don't Isolate, AI Strategy:** The most effective path to executive alignment and resource allocation is to position AI as an accelerator of your existing business strategy and core priorities, rather than a separate, standalone initiative.

- **Adoption Doesn't Just Happen:** Launching beneficial AI use cases is only the first step; dedicated effort is required to build an AI-first culture, overcome mental barriers, and drive adoption beyond early enthusiasts to the broader team.

- **Business Ownership Drives AI Success:** For AI initiatives to truly gain traction and deliver results, they must be championed by dedicated business leaders who actively collaborate with technical and sales teams to guide implementation and ensure alignment with real-world needs. At RT we now have one owner over the Value Creation pillar and another over AI-First Culture.