Sales Discovery Script: AI Modernization Campaign

Phase 1: Uncovering the "Dashboard Dead End"

Goal: Identify the pain of static reporting and the desire for AI.

1. "How many dashboards does your team currently maintain? Do you feel like you're constantly building new ones just to answer simple follow-up questions?"

2. "When your executives ask a question that isn't in the dashboard, how long does it take to get an answer? Hours? Days?"

3. "You mentioned you're moving to [Snowflake/Databricks]. What is your strategy for ensuring business logic (metrics) is consistent across all your consumption tools?"

Phase 2: The AI Gap

Goal: Expose the risk of connecting AI directly to the warehouse.

1. "Are you currently experimenting with Generative AI or 'Chat with Data' initiatives?"

2. "How are you planning to feed data to these AI agents? Are you pointing them at raw tables, or do you have a semantic layer in place?"

3. "If an AI agent queries your warehouse for 'Churn Rate,' how does it know which table and calculation to use? Are you worried about it 'hallucinating' the wrong number?"

Phase 3: Positioning the Solution

Goal: Introduce the Semantic Layer as the bridge.

1. "What if you could define 'Gross Margin' once, and have it be available to Tableau, your custom apps, and your AI agents simultaneously?"

2. "Would it be valuable to have a 'Headless' metrics store that governs all your AI interactions, ensuring security and accuracy?"

3. "If we could show you a way to make your [Snowflake/Databricks] data AI-ready in under 4 weeks without moving data, would you be open to a 30-minute technical deep dive?"

Objection Handling

- **"We use dbt."** -> "dbt is great for transformation, but it doesn't provide the API layer for AI agents to query metrics dynamically. We sit on top of dbt to expose that logic."

- **"We have a semantic layer in PowerBI."** -> "That locks your logic inside PowerBI. Your AI agents and custom apps can't access it. GoodData makes it open and reusable everywhere."