

Ask Docebo AI

The future of AI Intelligence at Docebo



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**The way we do business
“ is changing...**

**We either embrace the change, or be
left behind.**

**Over the last month, we have
met with GTM leaders about AI
initiatives...**

This is what we heard.

Preliminary Analysis

Initial discovery was done across all customer-facing roles (BDs, AEs, SCs, CSMs, AMs, PS) analyzing workflows, pain points, and system interactions.

Every process scored for impact against organizational OKRs, ease to implement, ability to measurable success, and common themes and trends.

Emerging Themes/Trends

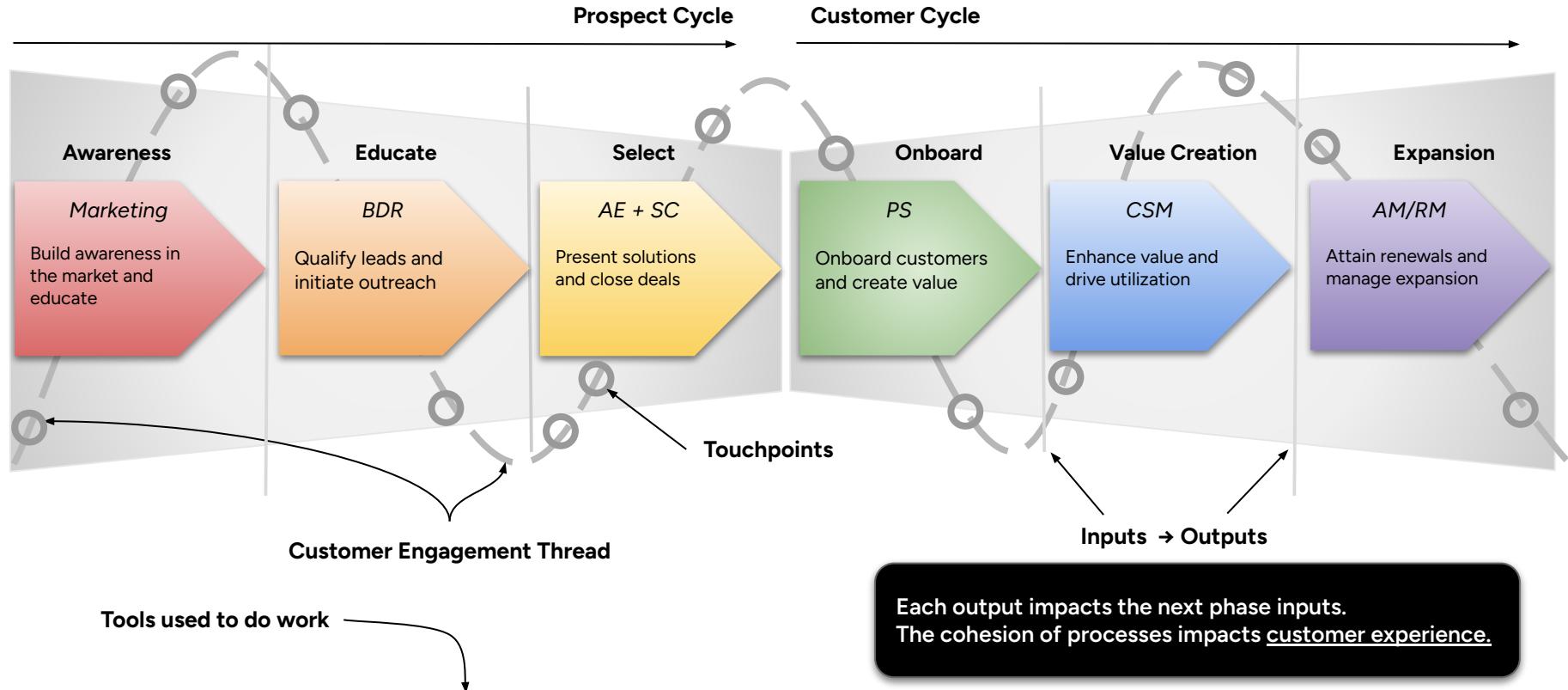
Fragmented systems & handoffs causing lost context and duplicated work

No unified customer view across the lifecycle

Inconsistency in data recording based on human error or lack of input

Manual processes are stealing time from high-value activities

Today's Landscape



Tech
Stack
(sample)



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Our Thesis

Revenue teams are hindered by fragmented information and manual processes

- **Splintered views:** Recreating customer context at different points with varying consistency
- **App sprawl:** Switching between tools to piece together account context and history
- **Knowledge gaps:** Repeating discovery due to inconsistent info handoff between stages
- **Menial tasks:** Significant time on data entry and documents creation, rather than strategic activities

This isn't just inefficiency:

- employee burnout
- lost revenue
- broken customer experience

All putting Docebo at a **competitive disadvantage**.



The Reality Today

From Q4 2024-Q3 2025:

\$152k

CAC

Customer Acquisition Cost

Expense amount incurred to acquire an additional customer (AMs expenses excluded)

\$1.70

Cost of ARR Add

Gross calculation

Ratio showing how much is spent (S&M, with AM) to attain an additional \$1 in ARR (new bookings + expansions)

97.9%

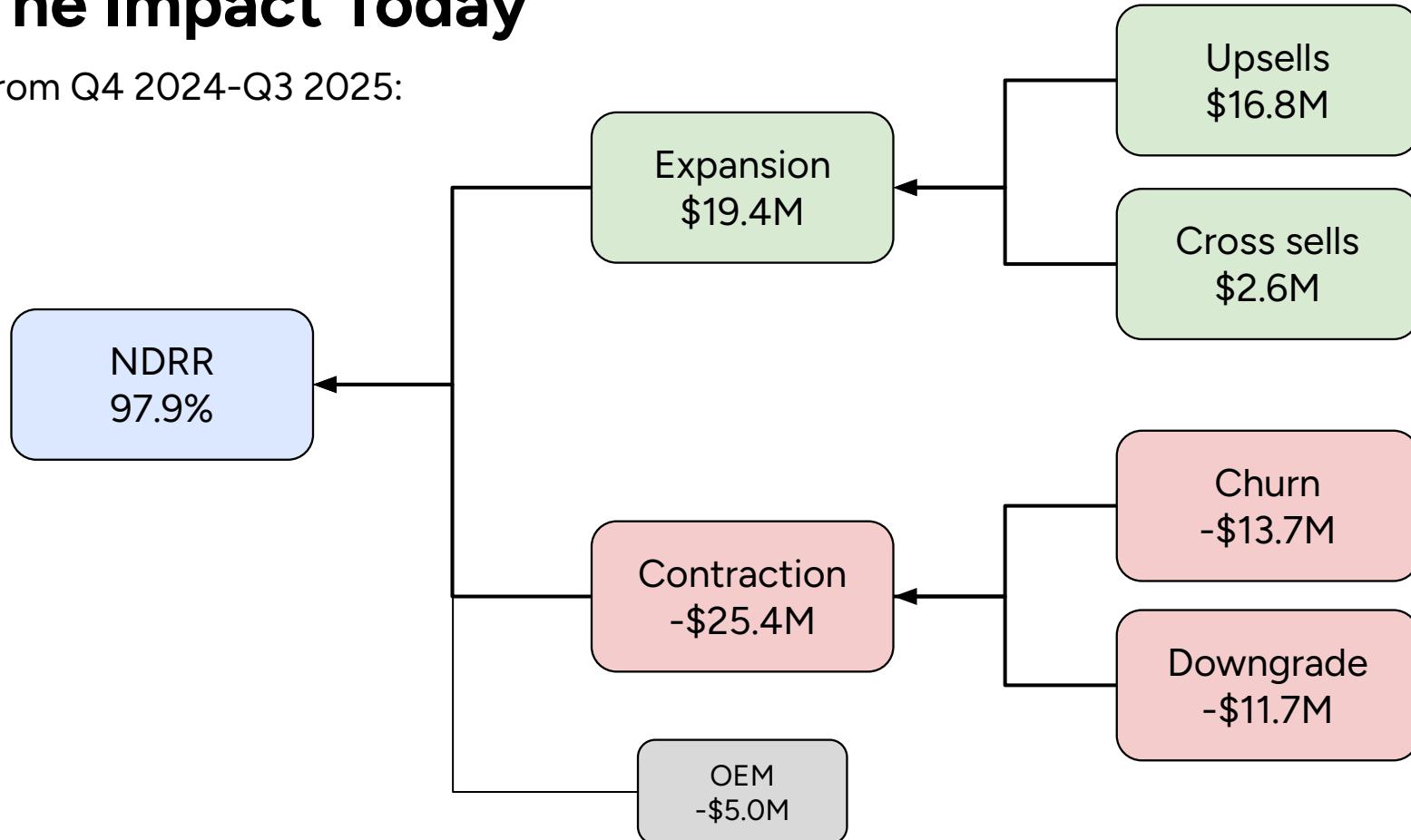
NDRR

Net Dollar Retention Rate

Metric which reflects how ARR has grown or shrunk on existing customer base.

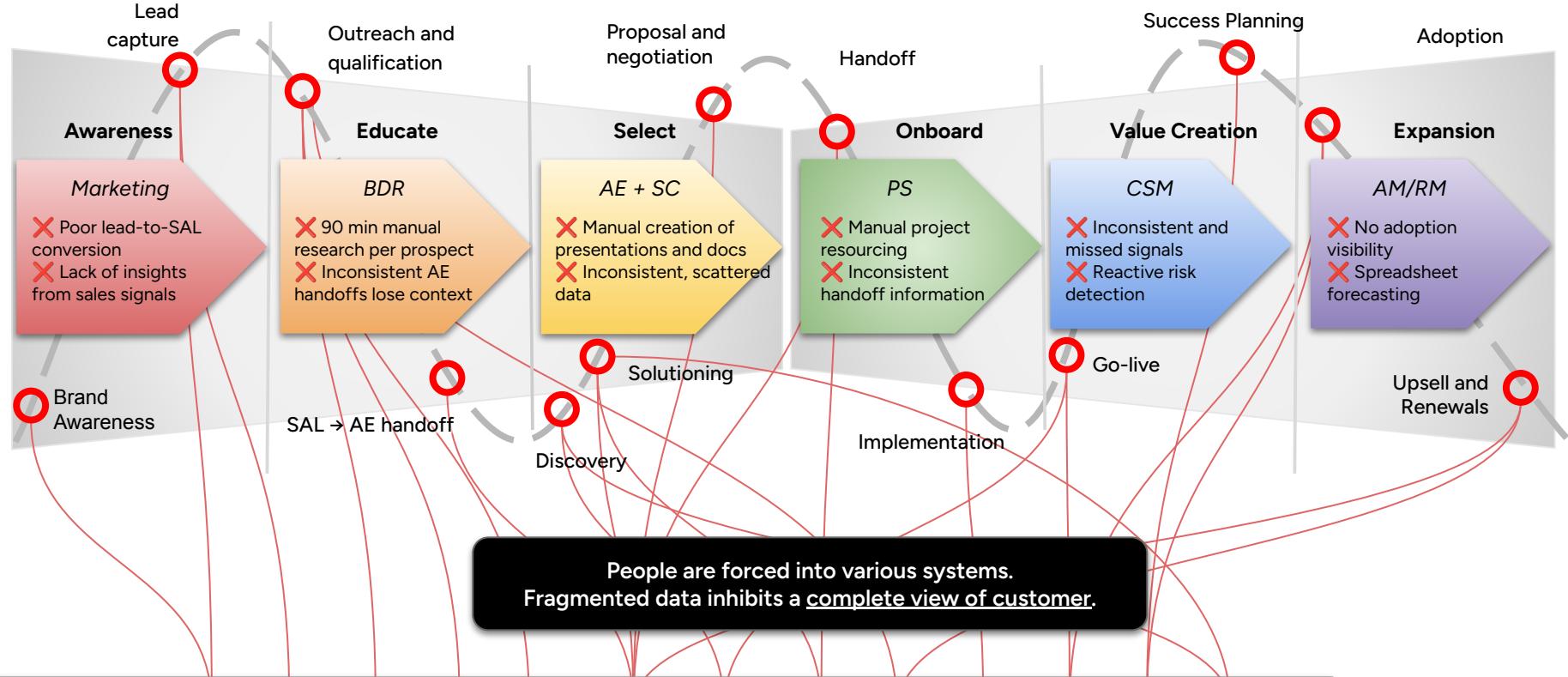
The Impact Today

From Q4 2024-Q3 2025:





Touchpoints + Pain Points

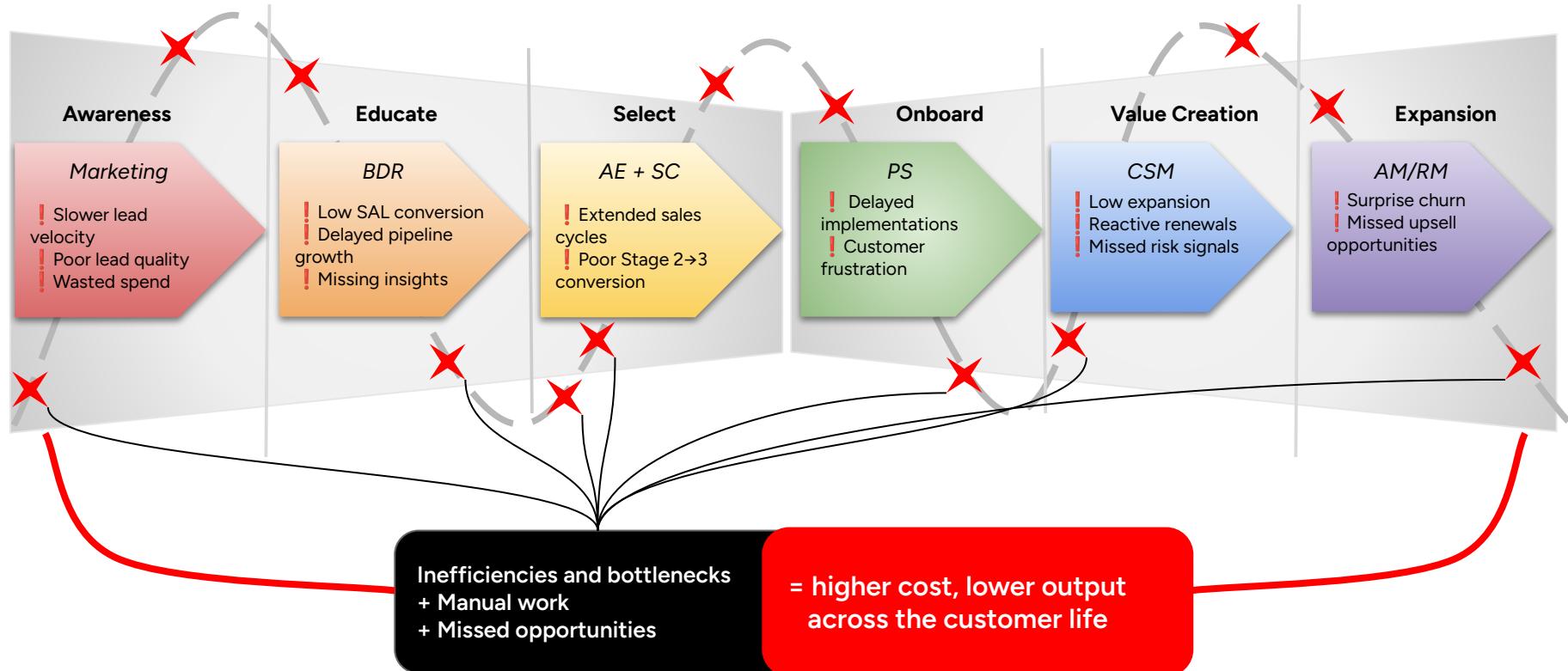


Tech
Stack
(sample)



Integrations

Business Impact



Our Opportunity

An AI intelligence layer to transform how our revenue teams work.

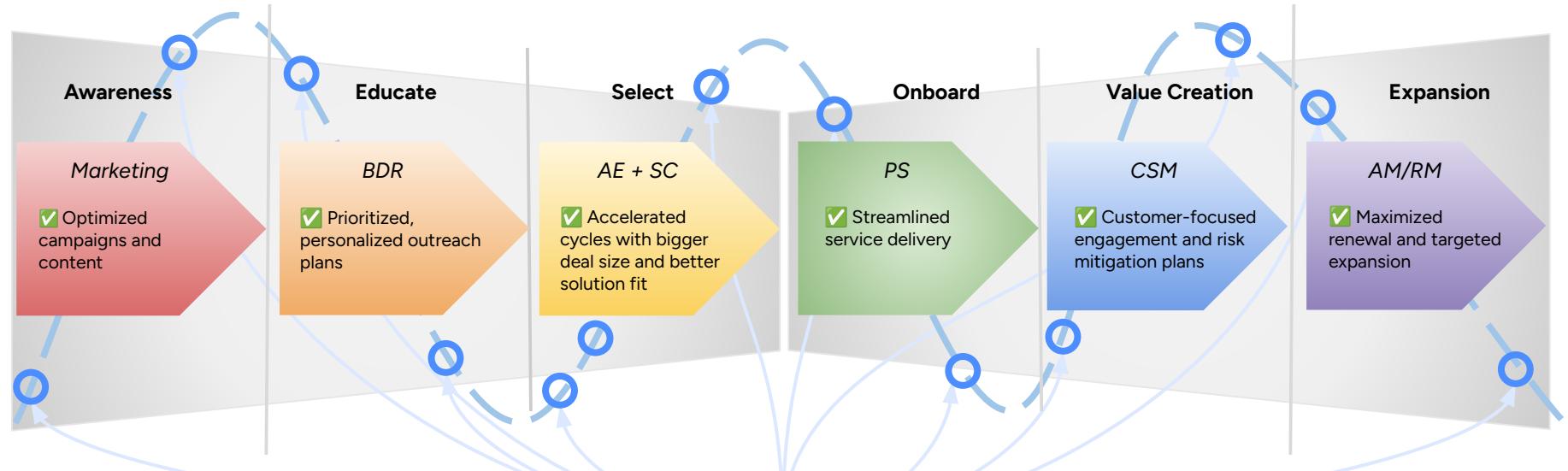
Instead of the daily grind, imagine:

- Insights surfaced proactively and just-in-time
- An intelligent layer connecting all Docebo's tools seamlessly
- Consistent customer context that is automatically updated and never stuck in silos
- Documents and data entry that are automatically generated from various signals

This is much more than just automating work:

- adding net new capacity for strategic activities (productivity)
- reclaimed revenue time (automation)
- a customer experience that becomes our competitive advantage

Phase 1 (Year 0-1)



Central Data Layer

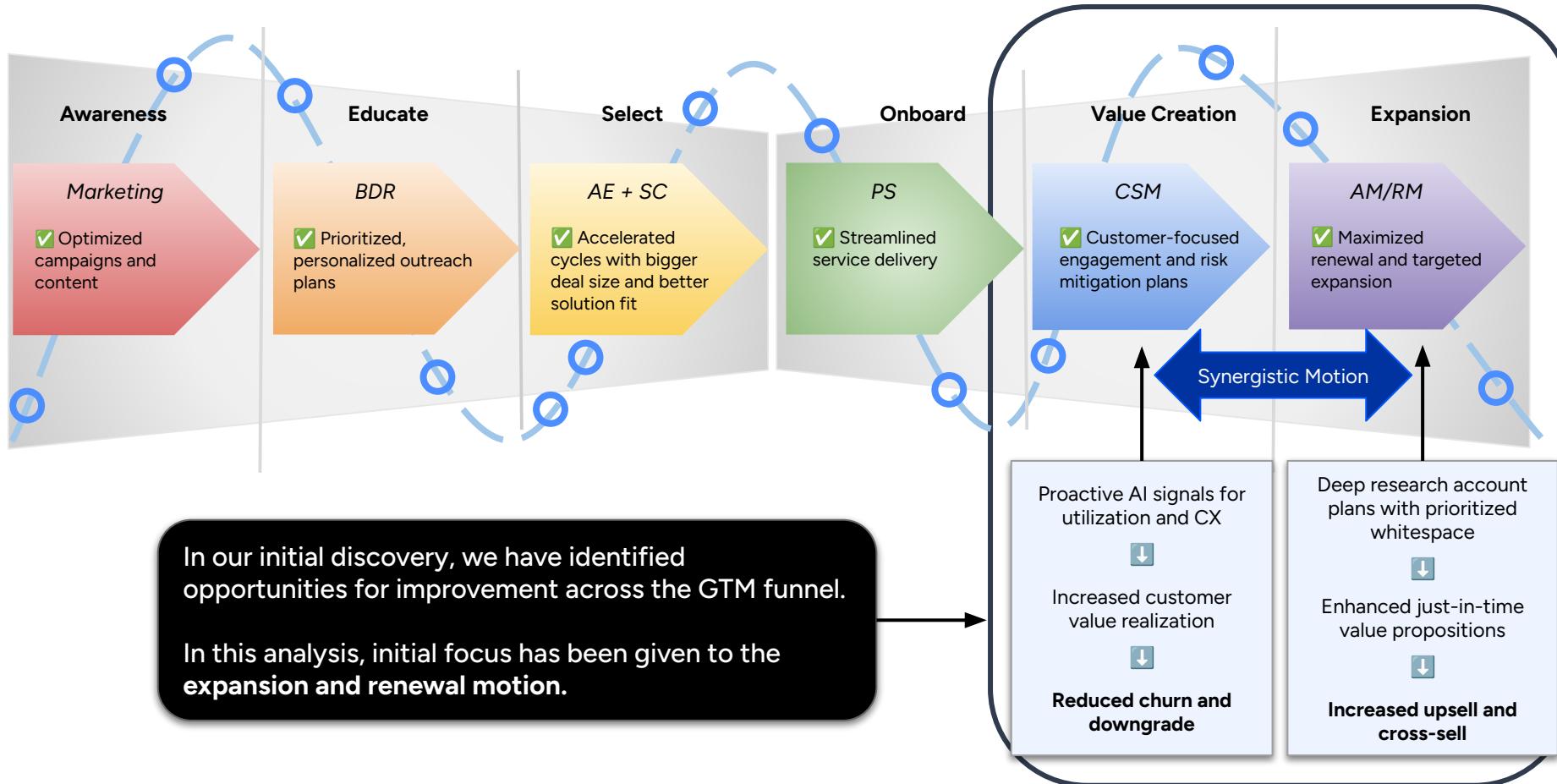


Vendor Applications (sample)

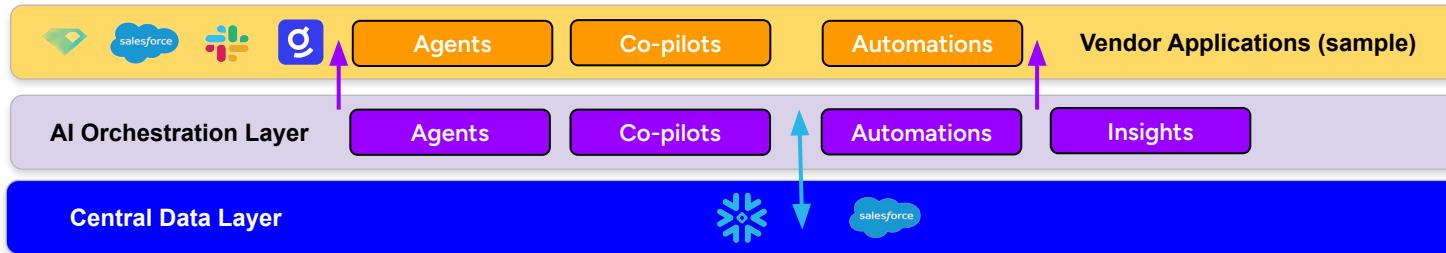
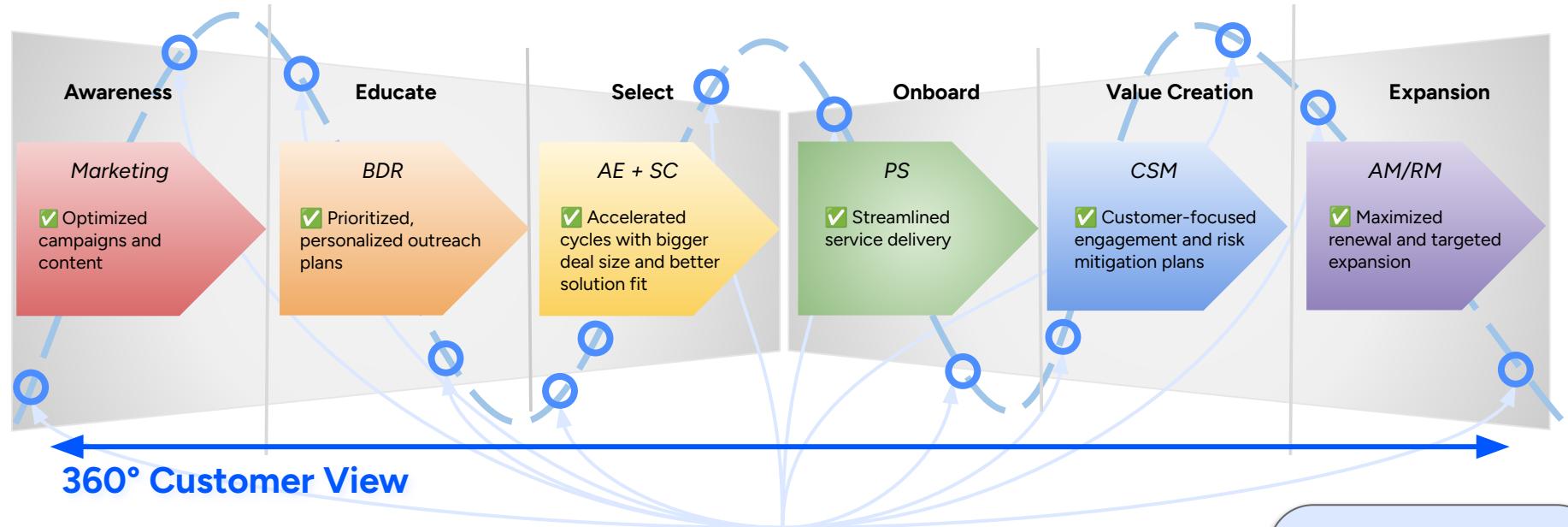
Deliver early value through available OOTB solutions.

Establish the data foundation for the future.

Impact across Funnel



Phase 2 (Year 1+)



Adopt ready-made solutions as needed.

Transversal intelligence and automation layer operating on unified data context. Unlocks data insights through customer lifecycle.

The Impact Tomorrow

For contraction/expansion,
if we assume equal improvement
powered by process+tech project,
what result would we see in NDRR?

Conservative



Aggressive

Scenario	Contraction Δ	Expansion Δ	Resulting NDRR (Q4'26)	ROI
Baseline	–	–	97.9%	–
A	-2%	+2%	98.2%	\$0.90M
B	-5%	+5%	98.7%	\$2.24M
C	-10%	+10%	99.5%	\$4.48M
D	-20%	+20%	101%	\$8.96M

For completely illustrative purposes only. This calculation assumes static NDRR for future period, which may not reflect true or expected conditions.

Timeline/Project Plan

Iterative Solution Development Cycle

Phase 1

Q4'25

Vision Alignment

- Agree upon core business drivers and desired areas of capability development
- Define major components of the solution aligned to specific business opportunities
- Establish strategic scope for project within Docebo

Phase 2

Q4'25 → Q1'26*

Architecture Validation

- Map out specific target architecture components aligned to the desired operational model, guided by business goals and strategic drivers
- Define and validate target solutions for individual business segments

Phase 3

H1'26 → Ongoing

Roadmap Development

- Identify solution dependencies and group major work packages
- Generate the initial version of the prioritized roadmap, based on validated opportunities
- Finalize solution delivery decisions and transitional phases

Phase 4

H1'26 → Ongoing

Build and Deployment

- Develop and implement solution components
- Realize continuous stakeholder value through iterative deployment
- Coordinate with business teams for enablement and utilization

Ongoing Requirements Monitoring

Continuous analysis and alignment of uncertainty and change (e.g. new technology opportunities, shifting stakeholder priorities, etc.)

Total Budget Request

GTM Transformation

<i>Item</i>	<i>Cost USD</i>
Contractors	\$100k
Software	\$270-370k
Infrastructure	\$100k
Data	\$50k
Headcount (1 FTE)	\$94k
Full Total	\$614 - \$714k
Skinny Version Total	\$385k

Baseline

<i>Item</i>	<i>Cost USD</i>
Enterprise AI <ul style="list-style-type: none">- Glean license- Glean hosting (AWS)	\$200k \$120k
ChatGPT	\$35k
AI Pilots	\$50k
Headcount (1 FTE)	\$94k
Total	\$499k

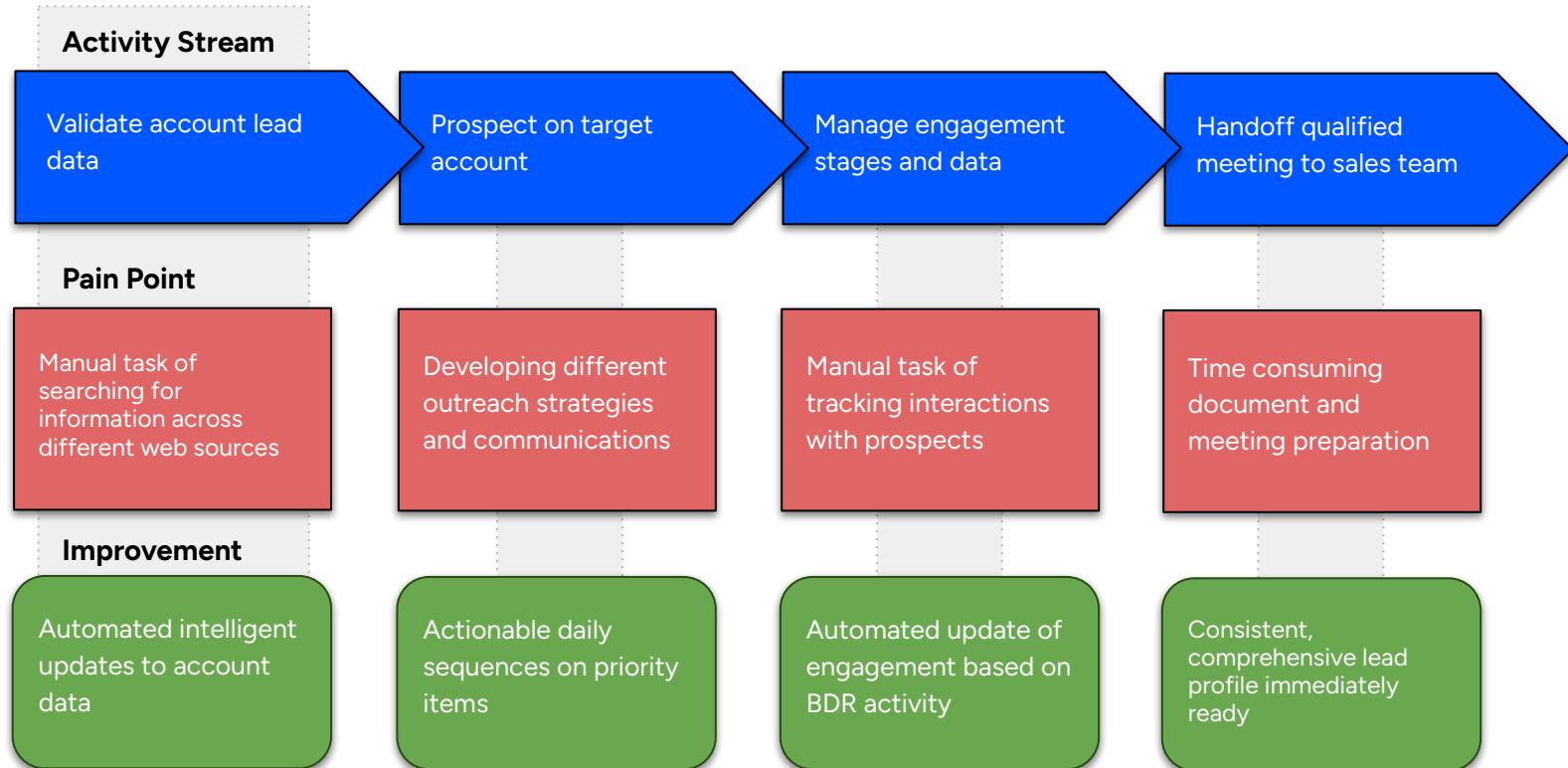
Appendix:

*"Day in the Life" Activity Streams**

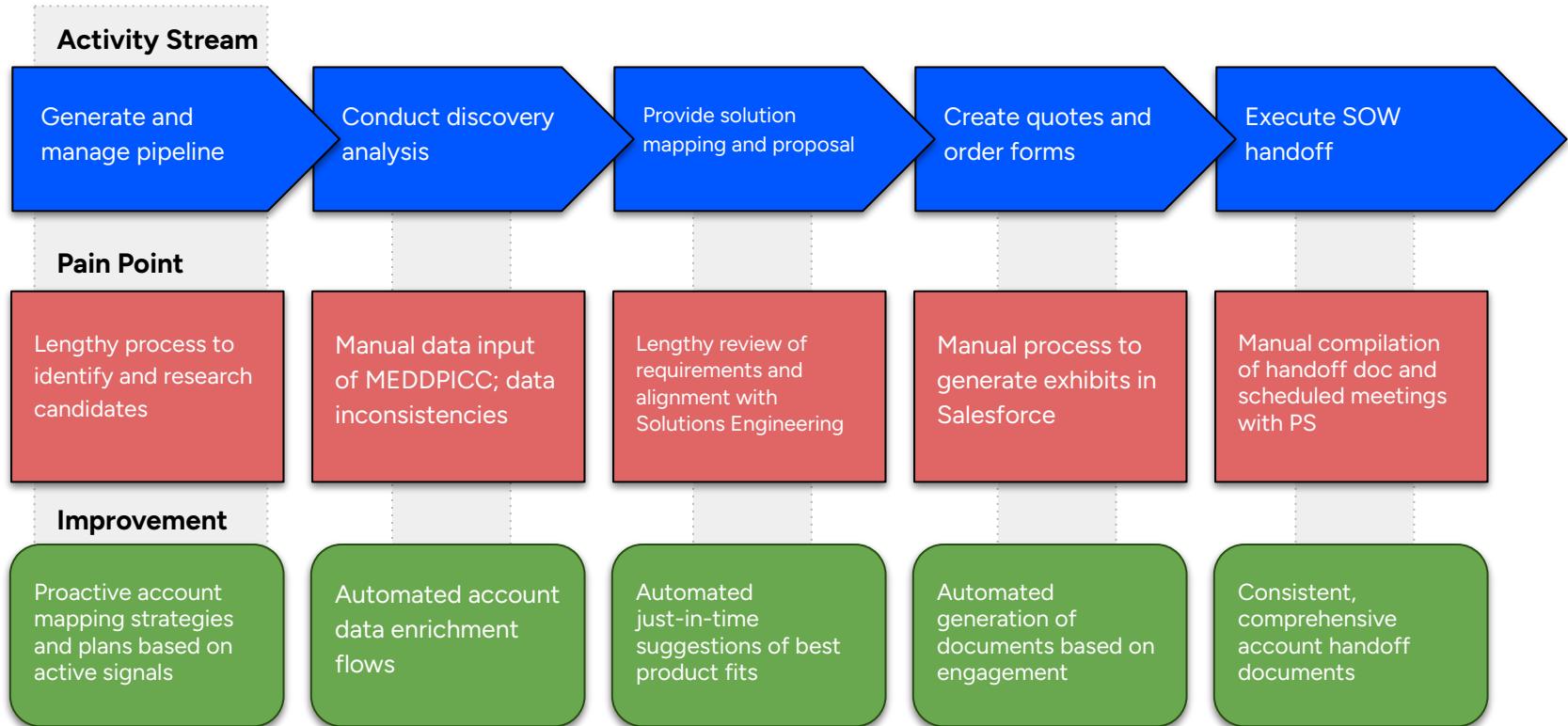
This section highlights various role-specific activities which are part of the GTM bowtie. This provides a high-level example of what issues exist today and the potential technology-powered (AI + Automation) solutions to enhance outcomes.

** The following activity streams are intended to be purely illustrative, and do not comprehensively capture all core responsibilities of each role.*

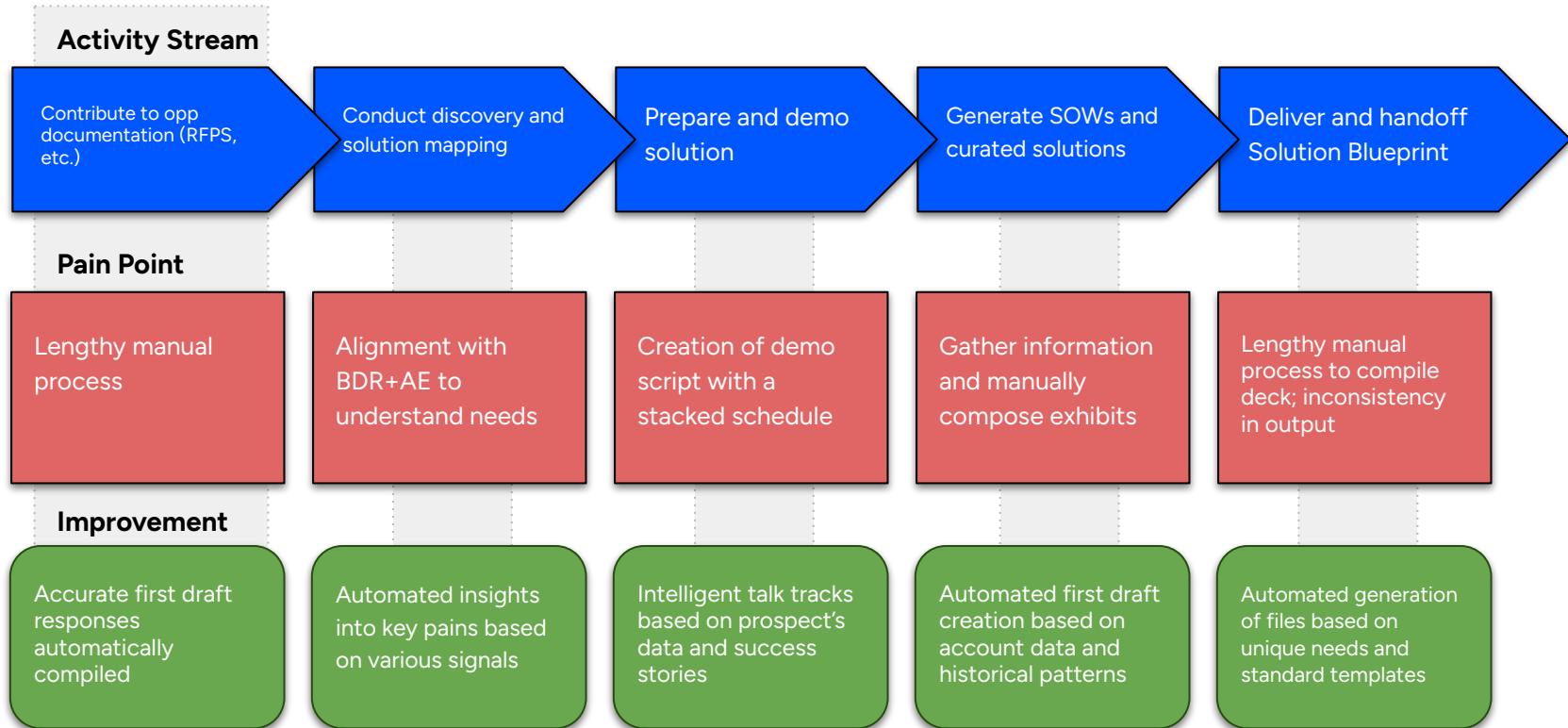
Day in the Life of Business Development (BDR)



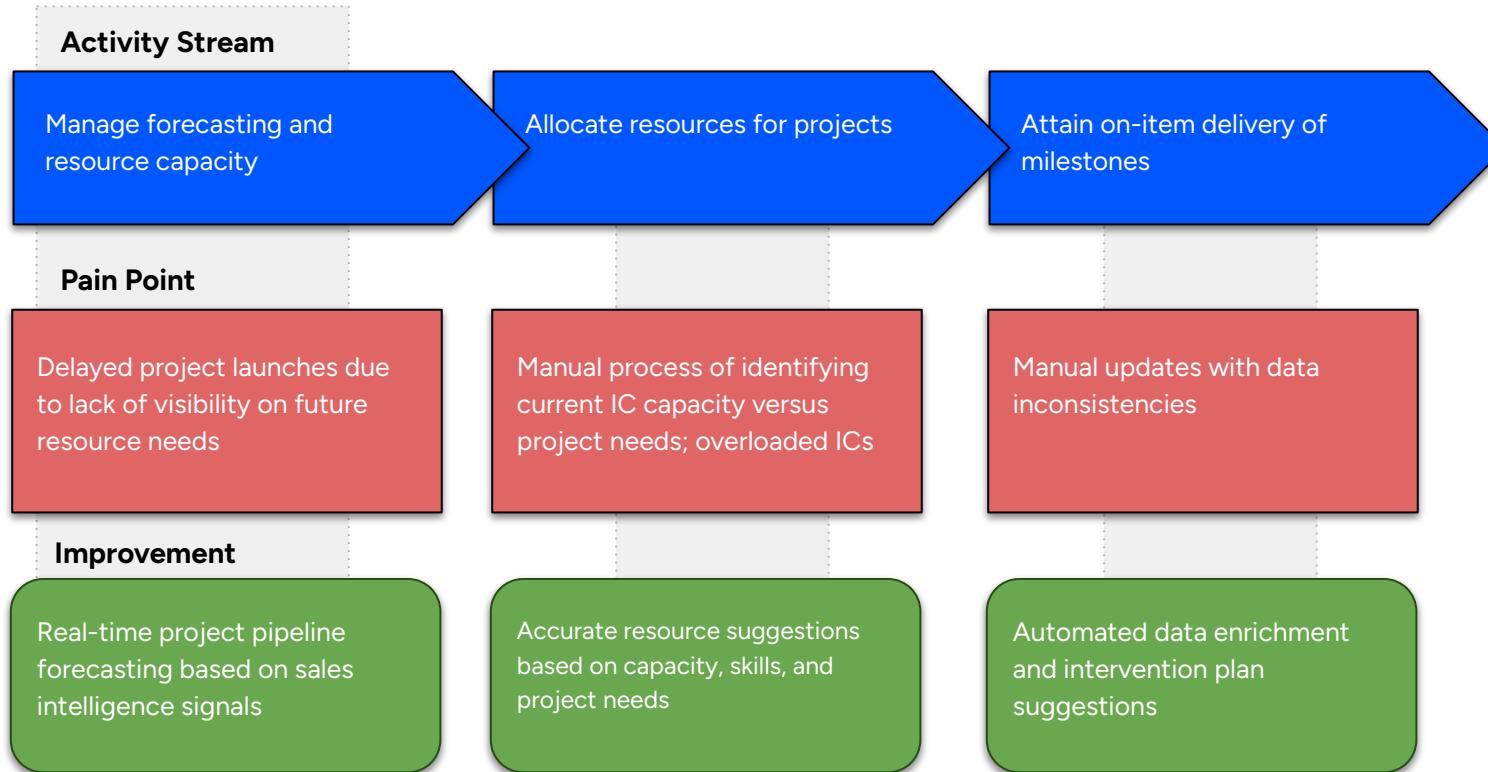
Day in the Life of Sales (AE)



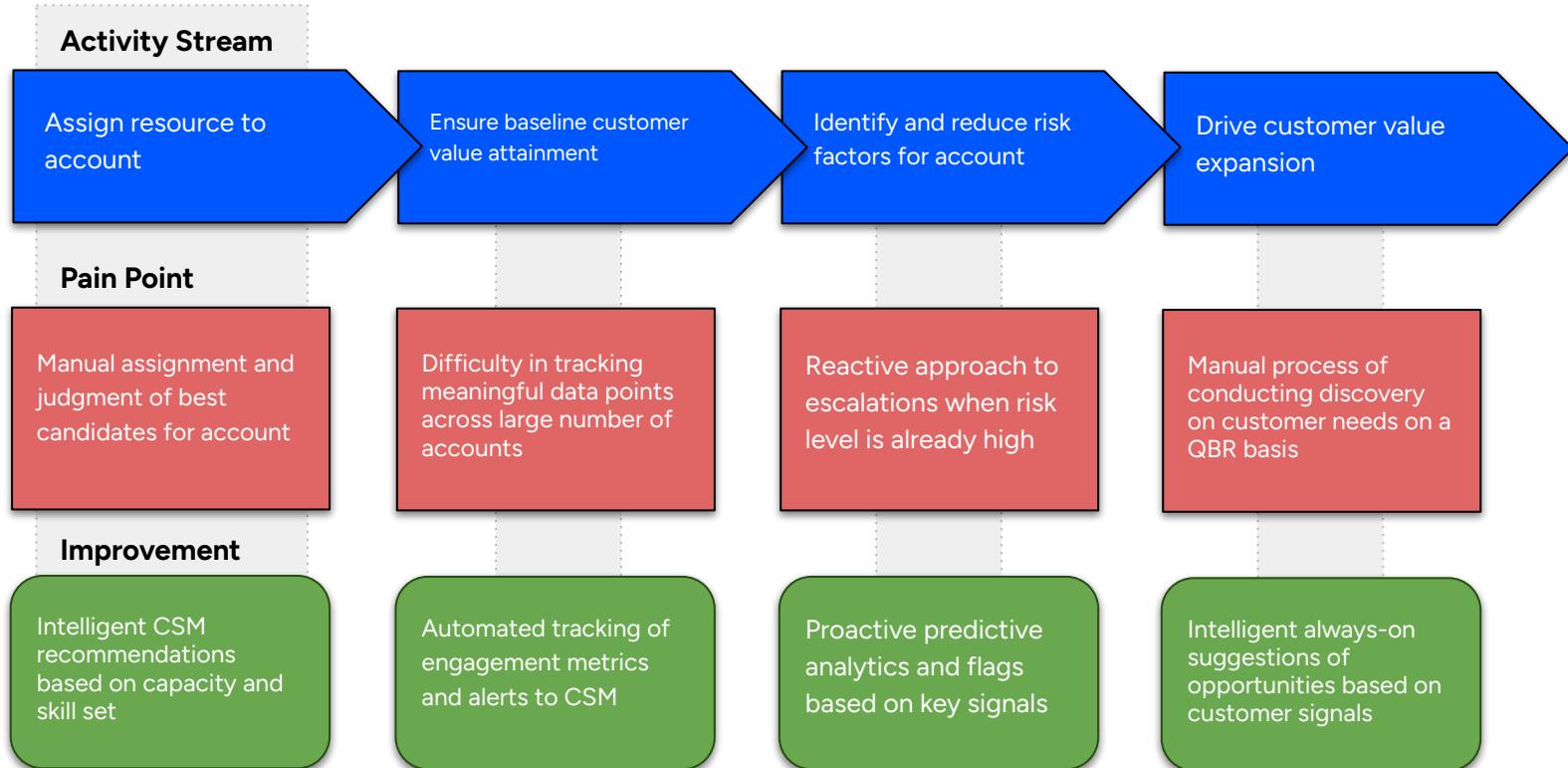
Day in the Life of Solutions Engineering (SE)



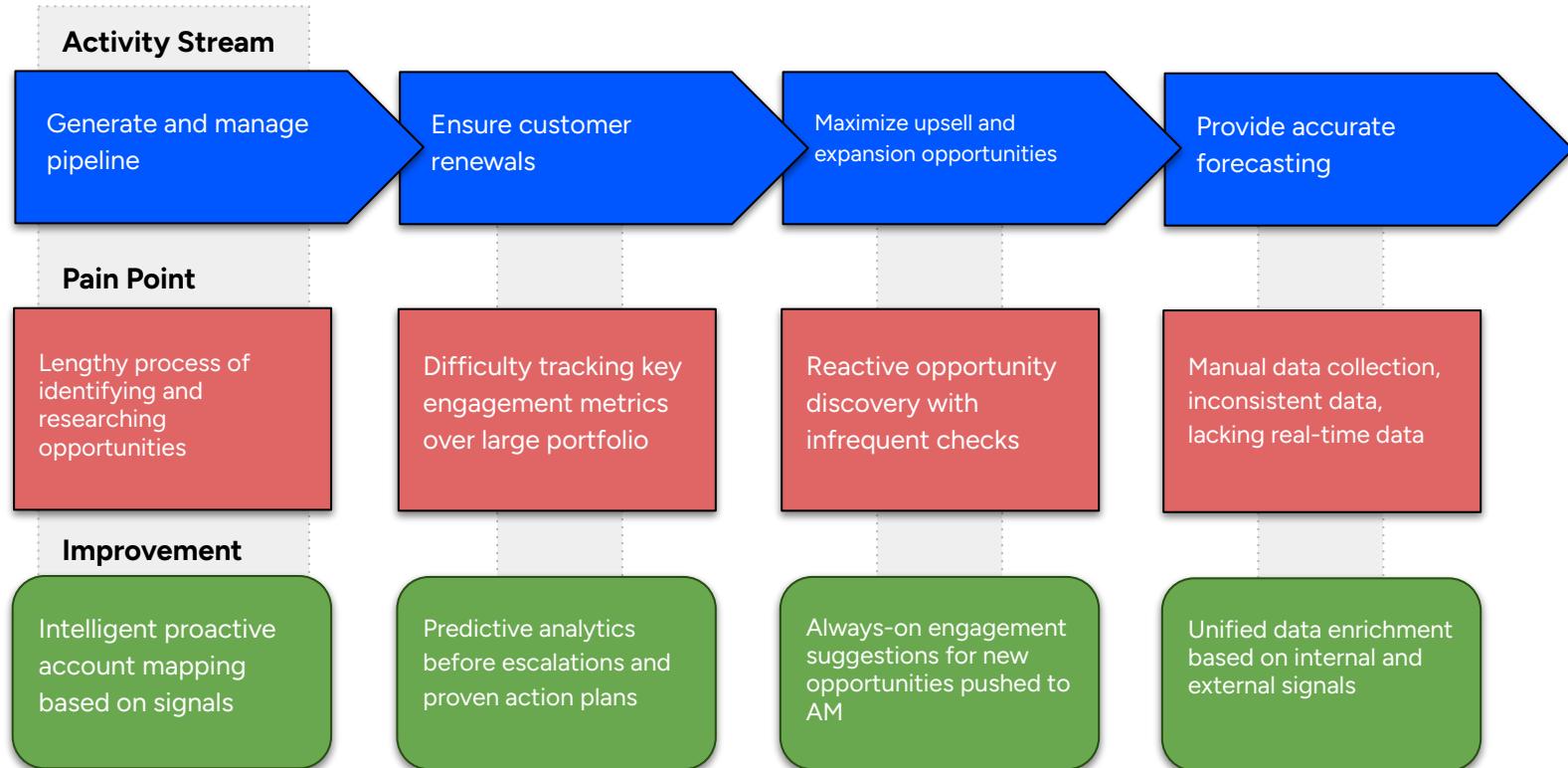
Day in the Life of Professional Services (PS)



Day in the Life of Customer Success (CSM)



Day in the Life of Account Management (AM)



Appendix:

Unified Platform UX

This section contains vision designs of a unified platform experience of a selection of GTM roles. This is intended to demonstrate a one-stop-shop UX that brings together various data points, signals, and call-to-action items that are prioritized and relevant for each role.

A Vision of Tomorrow: Just-in-time Alerts

Docebo ▾

- Threads
- Direct messages**
- # Channels

DIRECT MESSAGES

- Docebo AI Assistant**
- MJ Maria Johnson
- SK Sarah Kim
- JC James Chen

AI **Docebo AI Assistant** • Active • AI-powered customer insights

AI **Docebo AI Assistant** 10:34 AM
Hi Maria! I've detected a **high-risk alert** for one of your key accounts that needs immediate attention.

MegaCorp Industries **HIGH RISK**
Account Health Score: 42/100 (Critical)

KEY RISK INDICATORS

Support Tickets +5 new ↑ 250% increase	Platform Usage -30% ↓ Last 14 days
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RECOMMENDED INTERVENTION STEPS

- 1 Immediate Outreach:** Schedule an urgent check-in call with their CSM (John Davis) to understand ticket root causes and usage decline
- 2 Executive Engagement:** Loop in their C-level sponsor (Lisa Martinez, VP Learning) to discuss strategic alignment and address concerns at leadership level
- 3 Technical Review:** Coordinate with Support team to expedite resolution of open tickets and conduct system health audit
- 4 Adoption Workshop:** Propose complimentary training session to re-engage users and showcase underutilized features that address their needs
- 5 Success Planning:** Develop refreshed 90-day success plan with clear milestones, success metrics, and stakeholder touchpoints

View Complete Action Plan & Stakeholder Engagement Strategy

I've created a detailed action plan document with talk tracks, email templates, and stakeholder mapping

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A Vision of the Future: Account Executive

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AI PORTAL



Sarah Chen
Account Executive

Ask Docebo AI anything about your deals, training, or sales enablement...

Ask AI >

"What deals need attention today?"

"Recommend training for enterprise sales"

"Generate email for TechCorp follow-up"

"How to handle pricing objections?"

\$2.4M ↑12%
Pipeline Value

87% ↑5%
Training Completion

124% ↑Top 10%
Quota Attainment

42 On track
Activities Today

17 Today's Meetings

4 meetings

9:00 AM - 9:30 AM

Discovery Call

TechCorp Solutions • First meeting

View Prep Doc

11:00 AM - 12:00 PM

Platform Demo

Global Retail Inc • Stage 3

Open Agenda

2:00 PM - 2:45 PM

Quarterly Business Review

DataFlow Systems • QBR

Create QBR Deck

4:00 PM - 4:30 PM

Contract Review

FinanceFlow • Closing

Review Contract

AI-Powered Actions



Research Account



Draft Email



Create Proposal



Handle Objections



Analyze Deal



Next Action

Improve Your Skills

AI-curated

Enterprise Sales Methodology

15 min • For TechCorp deal

Continue

Handling Price Objections

8 min • Trending topic

Start

Integration & APIs Overview

20 min • For Global Retail

Resume

A Vision of the Future: Business Development

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AI PORTAL



Alex Kim

Business Development Representative

Ask Docebo AI about prospect research, account intelligence, or outreach strategies... Ask AI >

"Research TechVentures Inc" "Show high-intent prospects" "Best outreach for healthcare" "Companies expanding L&D"

I need to research TechVentures Inc before my call tomorrow. What should I know about them?

TechVentures Inc Overview:

Company Profile: Series B SaaS company, 250 employees, focusing on HR tech solutions. Recently raised \$32M in funding.

Key Signals:

- Posted 15 new job openings in last 30 days (40% growth trajectory)
- Announced partnership with Microsoft last week
- CEO mentioned "scaling our team" in recent LinkedIn post

L&D Context: Currently using a legacy LMS (outdated platform). Their HR Director has been researching modern learning solutions based on recent content engagement.

What pain points should I focus on in my outreach?

Your Prospect Sequences 8 active

Initial Outreach - Email
TechVentures Inc • Sarah Chen
 Send personalized email about scaling L&D Due Today

Follow-up Call
DataCore Solutions • Mike Thompson
 Discovery call scheduled Tomorrow 2pm

Recent Prospect Activity Live feed

Funding Announcement
TechVentures Inc
Raised \$32M Series B led by Sequoia Capital. Plans to double headcount and expand to European markets.
2 hours ago

Hiring Spree Detected
DataCore Solutions
Posted 10 new job openings including Head of Learning, R&D, Development, and IT Training. Coordinated all roles.

A Vision of the Future: Customer Success

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AI PORTAL



Maria Johnson

Customer Success Manager

Ask Docebo AI about customer health, adoption metrics, or renewal strategies...

Ask AI >

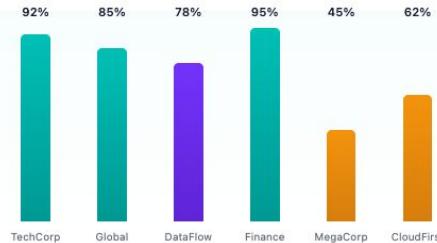
"Which accounts need attention?"

"Show at-risk renewals"

"Best practices for adoption"

"How to increase utilization?"

Top Accounts Utilization



Account Health Distribution



Predictive Risk Factors

MegaCorp Industries High Risk

5 new tickets logged • 30% drop in usage

CloudFirst Solutions Medium Risk

Change in management team • Contract expires in 60 days

Innovate LLC Medium Risk

No executive engagement • Low feature adoption

Today's Customer Meetings

4 meetings

9:00 AM - 9:30 AM

Quarterly Business Review

TechCorp Solutions • 92% adoption

✓ Healthy account

↗ Usage trending up

📅 Renewal in Q2

[View Health Score](#)

11:00 AM - 12:00 PM

Adoption Workshop

CloudFirst Solutions • At risk

⚠ New leadership

⬇️ Usage declining

👤 Training needed

[Open Action Plan](#)

AI-Powered Actions



Health Analysis



Renewal Forecast



Success Plan



Engagement Tips



Draft Check-in



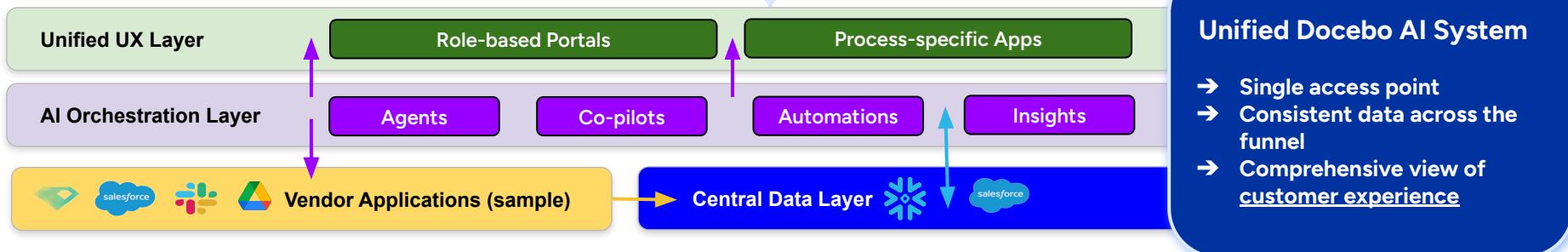
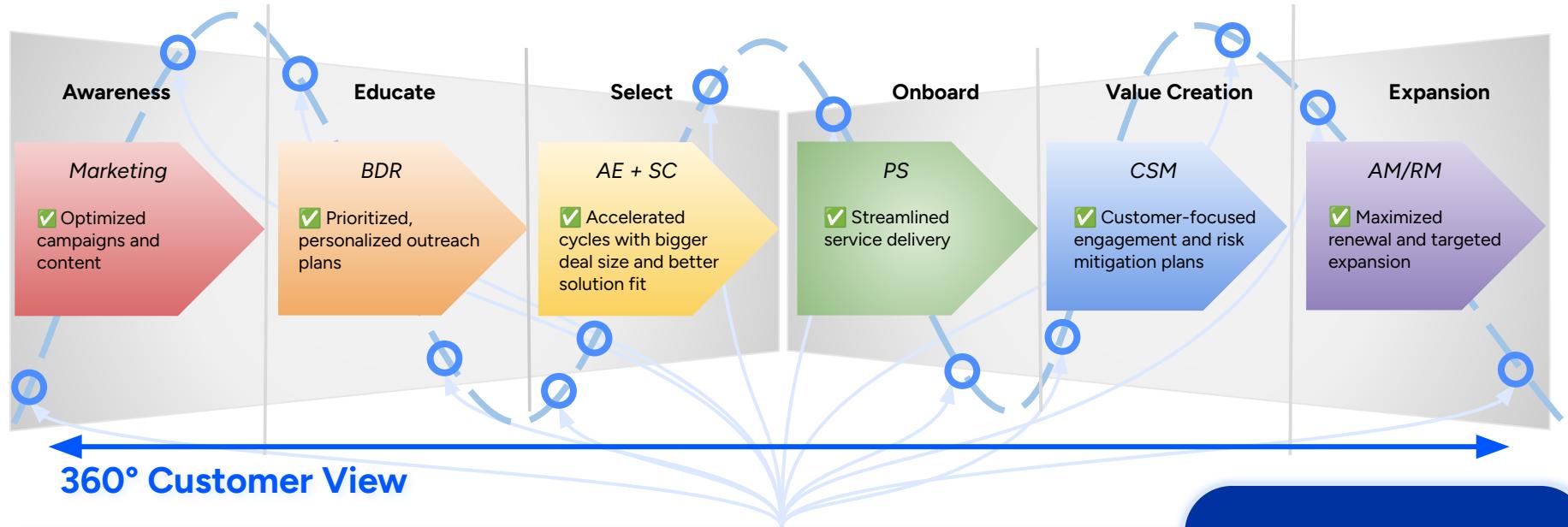
Risk Mitigation

New Product Updates

This week



Unified Platform Experience



END