

EasyVista AI Transformation

YELIN.IO

EasyVista AI Transformation

Q1 2026 Final Deliverable

Three Workstreams. One Quarter. Measurable Impact.

Prepared for Evan Carlson, COO & Patrice Barbedette, CEO

Engagement January -- March 2026

Team Henry Yelin, Mike Duncan, Russell Beggs

Classification Confidential

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PART 01

AI/GTM Executive Brief

Two Workstreams. One Quarter. Measurable Impact.

From January through March 2026, Yelin.io partnered with EasyVista to deploy two AI-powered GTM tools across 6 regions, training teams in multiple languages and establishing governance frameworks for sustainable adoption.

793

CONTACTS REACHED

Across 10+ campaigns

97.3%

DELIVERABILITY

252 of 259 emails delivered

2,040

KNOWLEDGE ENTRIES

EN + FR + OTRS

65.5%

AI-GENERATED

RFP responses

ENGAGEMENT TEAM

Mike Duncan (Lead) · **Henry Yelin** (Partner) · **Russell Beggs**
(Engineering)

Lemlist: From Zero to 793 Contacts in

21 Days

Enterprise-grade outbound automation deployed across US, France, DACH, UK, Spain, and Italy. AI-generated multichannel workflows combining email, LinkedIn, and SMS into intelligent sequences.

Lead Funnel Performance

Feb 18 -- Mar 26, 2026. All campaigns, all users.

STAGE	COUNT	RATE
Contacted	793	100%
Delivered	601	75.8%
Opened	123	15.5%
Clicked / Accepted	95	12.0%
Replied	19	2.4%

BDR Performance Breakdown

Individual campaign performance as of March 26, 2026.

BDR	LEADS	SENT	OPEN RATE	KEY RESULT
Britton Hudson	2,500	28	46.2%	LinkedIn-focused, 25% invite accept
Blaise Lutete	161	97	31.5%	Top email sender, 96.9% delivery
Lucas Klotz	252	80	55.6%	100% delivery rate, highest open rate
Eric Montaron	216	10	--	French market, Souverainete campaigns
Claudia Marcelos	42	44	--	97.7% delivery, fully ramped

Email Health & LinkedIn Performance

Lemwarm Deliverability Scores

4 mailboxes in strong range (80+). Claudia improving (77). Scores 80+ indicate strong inbox placement.

BDR	SCORE	STATUS
Blaise Lutete	90	Highest
Lucas Klotz	89	Strong
Britton Hudson	88	Strong
Eric Montaron	86	Strong
Claudia Marcelos	77	Improving (from 70)

Channel Reply Rates

LinkedIn outperforms email by 3x -- strongest engagement channel.

CHANNEL	REPLY RATE	NOTE
LinkedIn	12.4%	Top channel
Britton (All Channels)	10.1%	Top BDR
All Channels Combined	4.4%	Above industry
Industry Average	1-5%	Benchmark

LinkedIn Automation

447

PROFILE VISITS

Automated via AI workflow

280

INVITATIONS SENT

Across 6 campaigns

93

INVITATIONS ACCEPTED

Combined acceptance rate

145+

LINKEDIN DMS SENT

Personalized multichannel

LinkedIn Performance by BDR

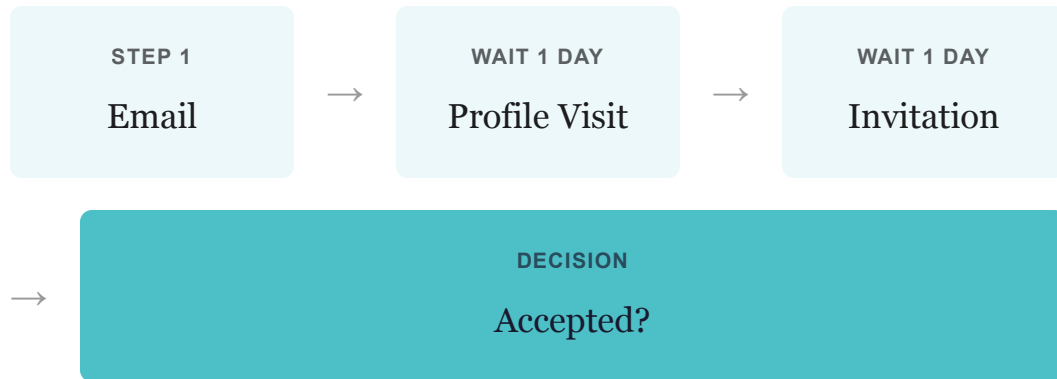
BDR	INVITATIONS	ACCEPTED	ACCEPT RATE	DMS SENT	KEY ACTIVITY
Britton Hudson	280	72	25.7%	130+	AI-generated workflow, enterprise US targets
Blaise Lutete	17+	17	15.9%	11	French market, voice messages, Royal Canin reply
Lucas Klotz	4+	4	8.2%	4	DACH market, Tesla/SoFi targets
Claudia Marcelos	--	--	--	--	3 campaigns active, Italy market
Eric Montaron	--	--	--	--	Souverainete campaign, French market

ENTERPRISE COMPANIES REACHED

LinkedIn outreach is reaching decision-makers at enterprise organizations including **Gartner, Johnson & Johnson, The Hartford, Tesla, SoFi, Royal Canin, Eurosport, Mount Sinai Health System, CACI International, and Elwyn** -- demonstrating the platform's ability to access high-value accounts at scale.

AI-Generated Multichannel Workflow

Britton Hudson's campaign -- fully generated by Lemlist AI in under 30 seconds. This intelligent sequence combines email, LinkedIn profile visits, connection requests, and direct messages into a single automated workflow with branching logic.



IF ACCEPTED

Chat Message (LinkedIn DM, Day 1), then wait 3 days, then follow-up DM. Closes with a final LinkedIn chat message after 5 days.

IF NOT ACCEPTED

AI-personalized email (Day 1), then wait 3 days, then final email follow-up. Closes with a final LinkedIn chat message after 5 days.

AI WORKFLOW RESULTS

This AI-driven workflow has now produced **447 LinkedIn profile visits**, **280 invitations sent**, and **72 accepted connections** for Britton Hudson alone -- validating the fully automated multichannel approach at scale.

Adoption Velocity

7.0x growth in 16 days since full deployment audit.

113

MAR 10 BASELINE

Post-audit starting point

793

MAR 26 TOTAL

+602% growth -- 7.0x increase

VOLUME OPPORTUNITY

With reply rates 2-3x above industry benchmarks, the primary lever for Q2 is **volume**: activating the remaining inactive BDRs, expanding LinkedIn-first sequences, and increasing campaign throughput across the active team. The data validates the platform -- now it needs scale.

Loopio: 2,040 Entries Powering 23 Active Projects

Restructured EasyVista's RFP response capability with a multilingual knowledge library, AI-first answer generation, and a new security review workflow -- reducing response time while improving consistency.

Knowledge Library

2,040 total entries across 3 languages.

LANGUAGE	ENTRIES	SHARE
English	907	44.5%
French	882	43.2%
OTRS (German)	251	12.3%

Active Projects

23 projects across 3 languages.

LANGUAGE	PROJECTS
French	12
English	9
Spanish	2

65.5%

AI-GENERATED

RFP responses --
trending upward
with each new
project

18

PIPELINE
OPPORTUNITIES

Using Loopio for
RFP stage

200+

DOCUMENTS

Images, Word,
PDF in library

*"I am very happy with the progress and can not wait to see
how good this can get!"*

Todd Russell, Solutions Consultant -- after completing 2 RFPs in the restructured
Loopio platform

Platform Adoption & Governance

Monitoring individual BDR adoption and establishing governance guardrails to ensure quality outreach at scale.

BDR Adoption Status

● Britton Hudson	Active	● Blaise Lutete	Active	● Lucas Klotz	Active
● Eric Montaron	Active	● Claudia Marcelos	Active	● Pablo Pavon	New seat (from Kareem)
● Olga Shonina	Inactive (UK)	● Khalil Bedioui	Inactive (France)	● Ismael Sabbagh	Inactive (Spain)
● Karim Senra Bensciri	Seat reassigned	● Stefano Marrucci	Seat reassigned		

GOVERNANCE INCIDENT -- MARCH 9

Eric Montaron created an unauthorized campaign outside the approved workflow. The campaign was identified and paused before any emails were sent. **Recommendation:** implement a formal campaign approval workflow before BDR launch to prevent unvetted outreach.

ONBOARDING GAP

8 BDRs were added to the platform without a formal onboarding process. A structured onboarding checklist (mailbox connection, warm-up activation, campaign review, approval) should be established for Q2 expansion.

The Results Speak for Themselves

Two enterprise platforms deployed in one quarter across 6 regions. The tools are live, the teams are trained, and the trajectory is accelerating -- all within 21 days of active deployment.

Lemlist Outbound

- **793** contacts reached in 21 days
- **97.3%** deliverability
- **99.9%** warm-up inbox rate
- **95** LinkedIn accepts
- **19** direct replies
- **14** active campaigns across 5 BDRs

Loopio RFP Platform

- **2,040** knowledge entries
- **65.5%** AI-generated responses
- **23** active projects
- **18** pipeline opportunities
- **200+** documents organized
- New AI-first security grid workflow

Investment vs. Impact

\$11K

TOOL INVESTMENT

Lemlist
Enterprise/yr
(~\$92/seat/month)

793

PIPELINE GENERATED

Contacts in
pipeline, 95
LinkedIn accepts

**1
deal**

BREAK-EVEN

From 793 contacts
covers full annual
cost

Engagement Timeline

Key interventions and milestones from January through March 2026.

JAN 21

Engagement Kickoff

Discovery calls across US, France, DACH, UK. Stakeholder mapping and regional requirements.

FEB 8-10

Platform Selection & Setup

Lemlist Enterprise signed (\$11,009/yr). Loopio library loaded -- 700-question translation completed 3 days early.

FEB 26-27

Bilingual Training Rollout

French session (Feb 26) and English session (Feb 27). Two tracks, six regions, zero translation gaps.

MAR 5

Full Deployment Go Decision

Evan sent org-wide launch email. All regions activated. CSM handoff to Esteban initiated.

MAR 9-10

Governance & Adoption Audit

Unauthorized campaign caught and paused (zero emails sent). Live dashboard audit identified adoption gaps. Escalation plan activated.

MAR 19

649 Contacts, 5.7x Growth

Executive brief delivered. Claudia Marcelos reactivated. 97.6% deliverability achieved. Platform running against enterprise targets.

MAR 26

793 Contacts, 7.0x Growth

Final data refresh. 97.3% email deliverability, 99.9% inbox rate, 19 direct replies. All warm-up scores trending up. HubSpot integration confirmed live.

Capabilities Delivered

Comprehensive consulting engagement across 6 regions.

STRATEGY & SELECTION

- Vendor evaluation and recommendation
- Enterprise plan negotiation
- Multi-region rollout strategy
- Stakeholder alignment across 6 countries

EXECUTION & MONITORING

- Bilingual training delivery (FR + EN)
- Live adoption monitoring via dashboard audits
- Crisis response (governance incident)
- CSM coordination and handoff

KNOWLEDGE INFRASTRUCTURE

- Loopio library restructuring (2,040+ entries)
- AI-first security grid workflow
- ESG expansion scoping
- 200+ documents organized

REGIONAL ENGAGEMENT

- DACH works council navigation
- France commercial team alignment
- OTRS integration coordination
- Spain and Italy BDR onboarding

"I am very happy with the progress and can not wait to see how good this can get!"

Todd Russell, Solutions Consultant -- after completing 2 RFPs in the restructured Loopio platform

THIS IS JUST THE BEGINNING

These results represent only **21 days of active Lemlist deployment** and the initial phase of Loopio restructuring. With 50% of BDR capacity still untapped, ESG expansion pending, and April AI prospection on the horizon -- the compounding returns are ahead, not behind.

Q2 Expansion & Project Handoff

The foundation is built. The next phase focuses on expanding AI-powered prospection capabilities, deepening Loopio adoption, and ensuring a clean handoff for sustainable operation.

APRIL

AI Prospection

Expansion

Deeper AI-powered lead generation and automated outreach systems. Market developing rapidly with daily AI improvements. Opportunity to expand Lemlist to field Account Executives beyond BDRs.

Q2

Lemlist Commitment

Q2 subscription commitment discussion active with Chris Hult. 10/10 seats utilized. Seat reassignments completed (Kareem to Pablo, Stefano to intern). SMS feature now live.

PENDING

ESG & Loopio

Douae (ESG/Sustainability) onboarding to Loopio for RFP sustainability forms. Evan requested March 6 -- scheduling in progress. Significant time savings potential.

APR 2

Final Readout & Handoff

Final read-out with Evan and Patrice. Documentation and handoff March 28-31. Esteban continues as Lemlist CSM. Yann maintains Loopio as product owner.

WHAT'S NEXT

Building on Q1's foundation, the April **AI/GTM Account Research** initiative will deepen EasyVista's competitive intelligence and prospecting capabilities -- applying the same data-driven approach that powered this quarter's results to the next phase of growth.

PART 02

Engineering AI Adoption Brief

From Exploration to Enterprise Adoption

In Q1 2026, EasyVista's engineering team transformed from early AI experimentation to enterprise-wide adoption -- growing from 33 active Copilot users in December 2025 to 50 daily users by March 2026. 89% of developers now use AI daily, with measurable gains in PR resolution time, onboarding speed, and code quality.



ENGAGEMENT TEAM

Russell Beggs -- Lead · **Henry Yelin** -- Partner · **Mike Duncan** -- GTM

89% of Developers Using AI Daily

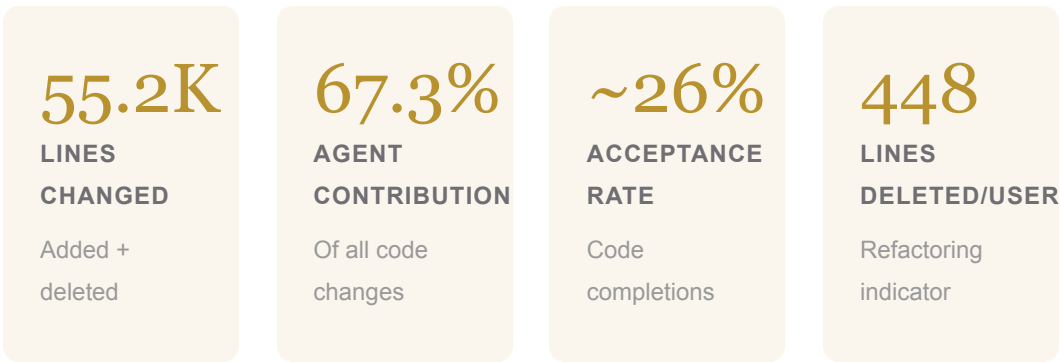
Adoption grew from approximately 40-50% to 89% over the quarter, with agentic AI usage reaching 86%.

Adoption Breakdown by Capability Tier

AI CAPABILITY	ADOPTION	STATUS
AI Code Completion	89%	50 of 56 developers
Agentic AI	86%	48 of 56 developers
AI Code Reviews	~75%	Active
AI Documentation	~70%	Growing
AI Chat	~65%	Established

From 33 to 50 Active Users

December 2025 GitHub Copilot statistics established the measurement baseline. In 28 days, 33 active users generated 55,200 lines of code changes with 67.3% contributed by AI agents.



Model Preferences

MODEL	USAGE
GPT-4.1	44.1%
Claude Sonnet 4.5	34.6%
GPT-5 mini	6.9%
GPT-5	3.9%
Other	10.5%

Language Distribution

LANGUAGE	SHARE
TypeScript	27.8%
PHP	10.4%
C++	9.5%
Python	8.1%
Other	44.2%

A 6-Week Rollout, Not a Mandate

AI adoption was driven through culture, not compliance. A structured 6-week change management program combined executive sponsorship with peer-driven champions.

WEEK 1 -- LAUNCH

CEO/CTO Relaunch & AI Hub

Executive email framing AI as capability shift. AI Hub v0 launched with quick-start guides, FAQ, known limitations. Champions introduced with office hours schedule.

WEEK 2 -- TRAINING

Getting Started & First Office Hours

Live training on setup, workflows, validation, do's and don'ts. First weekly office hours collecting blockers. Tips burst: 1 quick win + 1 validation example.

WEEK 3 -- STORIES

"Win of the Week" & Tap Survey #1

Practical peer stories shared (not marketing). First Tap outreach: 3-minute survey on sentiment, blockers, perceived value.

WEEK 4 -- MOMENTUM

Continued Office Hours & Peer Storytelling

Champions continue weekly sessions, gathering feedback and sharing wins across teams.

WEEK 5 -- ADVANCED

Advanced Workflows Training

Deep-dive sessions on refactors, tests, debugging, and documentation with AI tools. Champions lead hands-on workshops.

WEEK 6 -- TRANSITION

Leadership Snapshot & Claude Code Pilot

CTO presents DAU + enablement reach + top blockers to leadership. Claude Code pilot kicks off for technical debt remediation. Tap Survey #2 measures improvement.

CHAMPIONS PROGRAM

Voluntary, peer-driven initiative with ~1 hour/week commitment.

Champions are trusted engineers -- ICs, leads, QA, infra, full-stack, backend -- sharing tips, hosting office hours, gathering feedback, and contributing to the prompt library. Not compliance managers, but cultural catalysts.

"Copilot is working really well for speeding up repetitive coding tasks, especially boilerplate, small refactors, and suggesting implementations when the intent is already clear. It's also helpful for accelerating test scaffolding and reducing time spent on routine syntax or pattern recall."

Tap Survey Respondent

Measurable Gains Across the Board

AI tools delivered quantifiable improvements in PR cycle time, onboarding speed, and code quality -- with compounding benefits.

PR CYCLE TIME (PRS ARE PEER CODE REVIEWS)

AI-assisted pull requests resolve **47.7 hours faster** than non-AI PRs -- a **16% reduction** in cycle time. Based on active vs wait time using GitHub/DORA benchmarks.

Impact Across Engineering Practices

AREA	IMPACT
Unit Test Coverage	Dramatically improved across codebase
Documentation Quality	Transformed -- now rated "best ally" by developers
Defect Detection	Accelerated during release cycle
Problem Solving	Senior devs solving intractable problems in 3 hours vs 2 weeks
Model Exploration	20+ AI models actively explored -- teams self-optimizing tool selection

TAP Survey: 35 Conversations

Direct developer feedback reveals strong tactical adoption with emerging strategic use cases

STRONG -- TACTICAL ADOPTION

- Boilerplate generation
- Unit testing
- Code review assistance
- Refactoring

EMERGING -- STRATEGIC

EXPLORATION

- Ideation & brainstorming
- Architecture planning
- Design decisions

IMPROVING -- TRUST & QUALITY

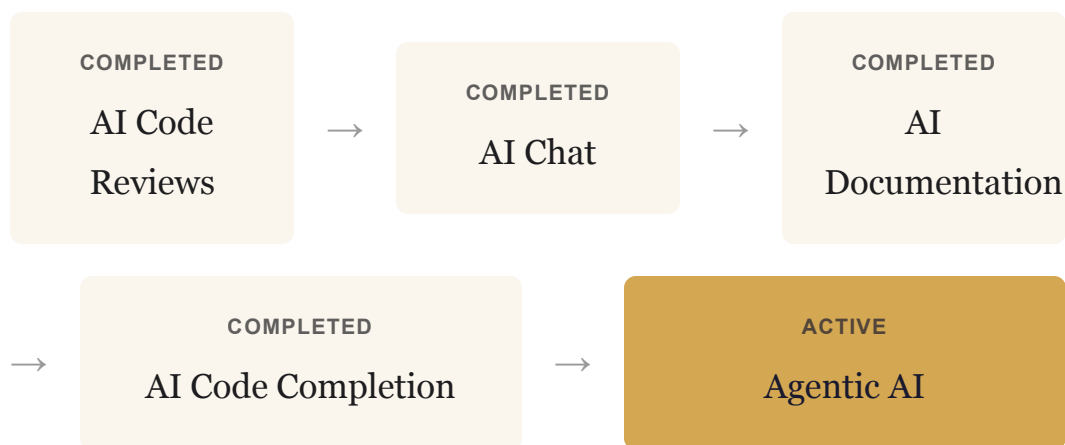
- 2-3 iterations to production-readiness
- Growing confidence in AI output
- Verification workflows established

TAP PLATFORM

- 4 targeted campaigns
- 35 respondents
- Weekly office hours evolving AI Evangelists from AI Champions

The AI Maturity Journey

EasyVista's engineering team has progressed through five stages of AI capability adoption.



EXEMPLAR ACHIEVEMENT

Senior developers now solving previously intractable problems using AI -- completing in **3 hours** what previously took **2 weeks**.

Sustaining Momentum

The foundation is built. The next phase focuses on deepening agentic AI practices, expanding tooling, and measuring long-term ROI.

ONGOING

AI Evangelists Program

Weekly office hours transitioning AI Champions into AI Evangelists across the organization.

Q2

Agentic AI Deepening

Expanding agentic workflows beyond code completion into architecture, testing, and deployment automation.

TRACKING

Model Optimization

20+ models explored -- teams continuing to self-optimize tool selection for specific use cases.

APR 2

Final Readout & Handoff

Final read-out with Evan and Patrice. Documentation and handoff. Engineering team fully self-sufficient.

WHAT'S NEXT

With 89% daily adoption and 86% agentic AI usage, EasyVista's engineering team has built a foundation for sustained AI-powered productivity. The compounding returns from these investments will continue to grow as practices mature and new capabilities emerge.

PART 03

Product AI Strategy Brief

AI Product Strategy & Market Opportunity

A comprehensive analysis of EasyVista's AI product capabilities, market positioning, and the untapped labor value opportunity across the European mid-market ITSM landscape.

€3.5B

COMBINED TAM

Software + labor value

530

SAAS CUSTOMERS

424 mid-market

€60K

VALUE PER CUSTOMER

Annual labor savings

3.35x

VALUE MULTIPLE

Created vs captured

ENGAGEMENT TEAM

Henry Yelin -- Lead **Mike Duncan** -- GTM **Russell Beggs** --
Engineering

Five AI Capabilities in Market

From intelligent ticket suggestions to conversational AI and developer tooling, EasyVista's AI portfolio spans the full support

lifecycle.

Product 1: EV Pulse AI Suggestions

GA -- INCLUDED IN BASE

Intelligent categorization, urgency scoring, similar ticket identification, knowledge base article identification. Reduces cognitive load and improves consistency for IT support agents.



13.3% DAU/WAU ratio -- strong engagement. 530 customers.

Product 2: EV Pulse AI Automations

GA -- PAID ADD-ON

Summarize, rephrase, title creation, translation, KB article generation. Time saved, fewer errors, faster resolution.

27 customers.

Product 3: EV Pulse AI Conversations

LAUNCHING APRIL 2026

LLM-based chatbot in EVSM portals. Multi-source knowledge access (EVSM, SharePoint, Google Drive). Ticket and service request creation.

1 early adopter. €2 per conversation.

Product 4: EasyVista for MS Teams

GA -- UNIVERSAL INTEGRATION

Conversational ticketing, smart request creation, integrated AI assistant, push notifications, knowledge access, approvals.



104ms average latency. €2.71/month inference cost. 99.9% SLA.

Product 5: GitHub Copilot (Internal)

INTERNAL ENGINEERING

GitHub Copilot rolled out to full engineering team. Claude Code pilot underway for technical debt remediation.



GPT-4.1 (44%) + Claude Sonnet (35%). TypeScript-dominant codebase.

Five Levels of AI Maturity

EasyVista's AI capabilities map to a five-level maturity model, from basic interpretation to fully autonomous operations.

LEVEL	NAME	DESCRIPTION	IMPACT
1	Explain	AI understands and interprets	30-50% productivity gain
2	Recommend	AI suggests next action	Higher first-time resolution
3	Assist (Current)	AI drafts with confirmation	Faster resolution
4	Operate	AI executes within guardrails	40-70% MTTR reduction
5	Autonomous	Closed-loop operations	Radical overhead reduction

PATH TO LEVEL 4

EasyVista currently operates at Levels 1-3 with a clear path to Level 4 through EV Pulse AI Operations -- 15-hour night-time forecast horizon, threshold recommendations, and automated remediation.

€3.5B Combined TAM

The European mid-market ITSM opportunity doubles when you account for the labor value AI unlocks.

TAM Composition

SEGMENT	VALUE	SHARE
Software TAM	€1.68B	47.3%
Labor Value TAM	€1.87B	52.7%

Market Sizing Funnel

STAGE	COUNT
EU Enterprises	33,000,000
Large (>249 employees)	66,000
Mid-Market (2K-20K)	41,250
Running ITSM	30,938

MARKET POSITION

530 customers. 1.71% market share (mid-tier). ServiceNow leads at 44.4%. Top 10 vendors hold 83.3%.

€60,375 Value Pool Per Customer

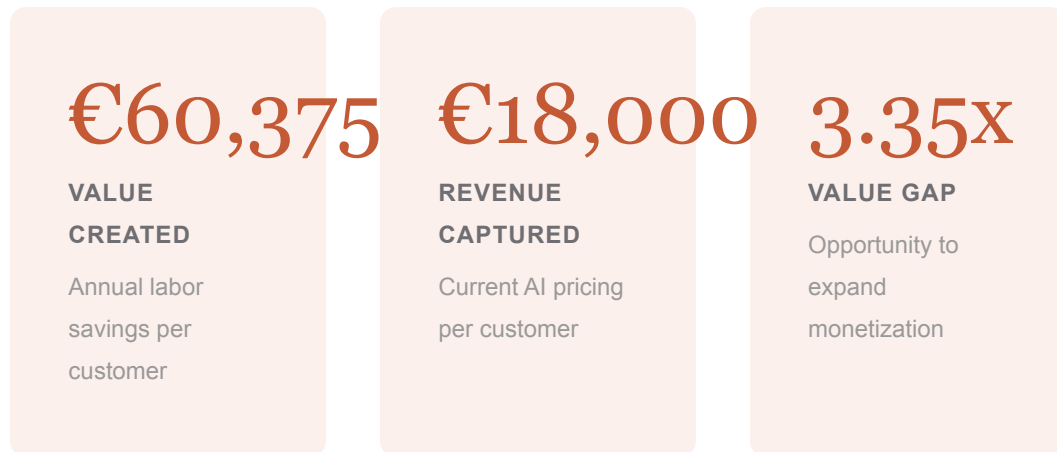
Each mid-market customer (30,000 tickets/year) generates significant labor savings through four AI-powered workflows.

WORKFLOW	TOOL	TICKETS	EFFORT	REDUCTION	HOURS SAVED	VALUE
Knowledge Resolution	Suggestions	18,000	6 min	30%	540h	€18,900
Ticket Categorization	Suggestions	30,000	6 min	20%	600h	€21,000
Status Checks	Conv./Teams	9,000	3 min	50%	225h	€7,875
Ticket Deflection	Conversations	9,000	12 min	20%	360h	€12,600
Total					1,725h	€60,375

SANITY CHECK

Combined hours saved (1,725/year) equals less than 1 FTE -- a conservative, defensible estimate.

Value Gap



From Level 3 to Level 5

The path forward combines product maturation, market expansion, and strategic reframing.

APRIL 2026

AI Conversations Launch

First early adopter live. Scaling to GA with €2/conversation pricing. Multi-source knowledge access.

Q2 2026

Level 4: Operate

Autonomous remediations via Reach/Orchestrate. Event-driven ticket creation and routing. 40-70% MTTR reduction target.

STRATEGIC

European Compliance

France AI Act readiness. Data sovereignty requirements. Position compliance as competitive advantage in mid-market.

SALES

Reframe the Conversation

Vertical AI pilots with measurable outcomes. Bridge the 3.35x value gap between labor value created and revenue captured.

REVENUE OPPORTUNITY

With €60,375 in annual labor value per customer and only €18,000 captured at current pricing, there is a significant opportunity to expand AI monetization while still delivering clear customer ROI.