

AI for Revenue Leaders

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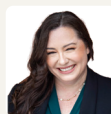


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"Hyperbound has fundamentally changed the math within our organization and allowed us to scale."

– Stevie Case, CRO at Vanta

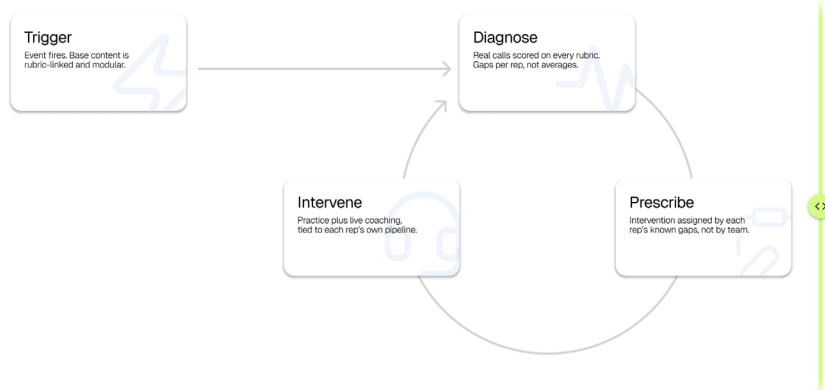


"We definitely cannot imagine going back to the way we were doing things before."

– Michael O'Brien, Senior Director of Sales Strategy at ALKU

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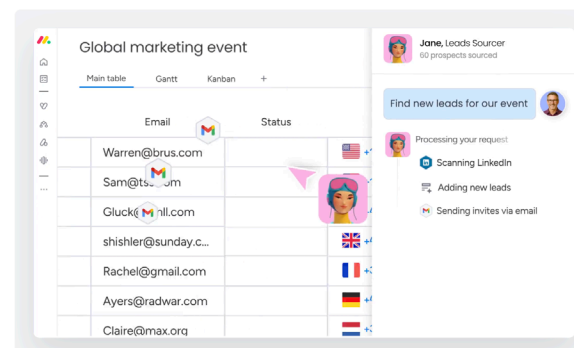
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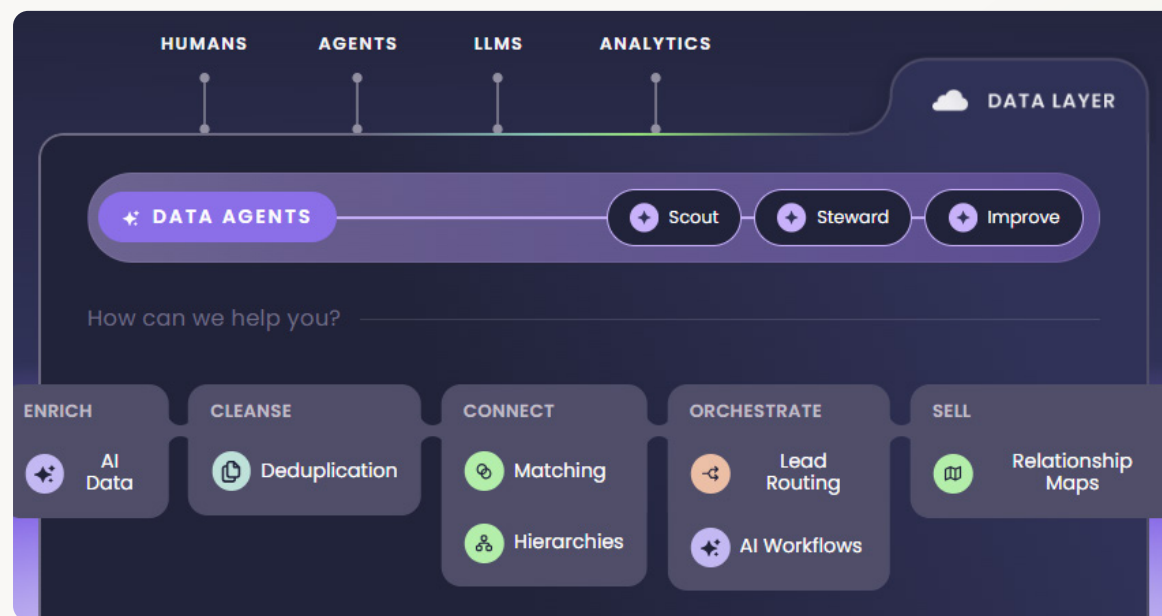
The logo for Traction Complete, featuring the word "TRACTION" in a small, sans-serif font above the word "complete" in a larger, bold, sans-serif font. A green checkmark is integrated into the letter 'c' of "complete".

TRACTION
complete

Traction Complete helps revenue teams at high-growth and enterprise companies rebuild trust in the data layer.

Its agentic data management suite brings enrichment, cleansing, lead routing, and account hierarchy management together, with transparent data agents that keep every record accurate as it changes. That's why revenue teams at businesses like Asana, GitHub, and Zoom never second-guess their data or the decisions built on it.

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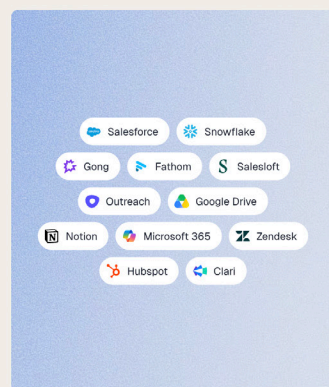


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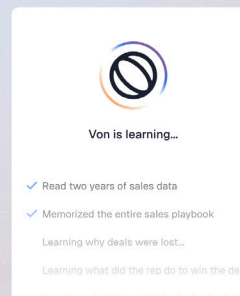
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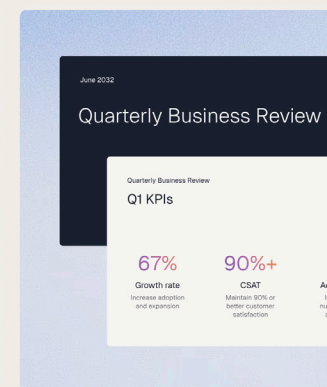
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Introduction

The hype era is over. Now bring receipts.

AI is no longer the thing revenue leaders are figuring out.

It's the thing their boards are auditing. For two years, a revenue leader could walk into a board meeting, say the word "AI," describe a pilot, and buy a quarter of goodwill. That era is over.

Across every Chief Revenue Officer Summit stage in 2026 – New York, Amsterdam, Boston, Silicon Valley – the same message landed again and again. Boards and CFOs no longer want to hear about transformation. They want receipts. Not adoption rates. Not seats deployed. Not a slide showing hours saved. They want to know whether the money spent on AI is showing up where revenue leaders are paid to make it show up: in the pipeline, in win rates, in forecast accuracy, and in the number on the board deck.

The shift is subtle but total. The question in 2024 was "are we using AI?" The question in 2025 was "how much are we using it?" The question in 2026 is the only one that ever mattered: "What did it earn?" And most revenue organizations do not have a good answer.

This is not a report about whether to adopt AI in the revenue organization. That question is settled.

This is a report about the gap that opens after adoption, the distance between having AI and getting paid for it.

That gap is wider than the industry admits, and our survey puts a hard number on it. Just 5% of revenue leaders can point to significant, quantified impact on revenue metrics. Over half report productivity gains they cannot tie to revenue at all.

Read that again, because it's the thesis of this report in one line: most of the organizations that adopted AI can't prove it moved a single dollar. That's not a technology problem. The tools work. It's an operating-model problem, and operating models are a leadership choice.

This report examines that choice from every angle.

- **Chapter 1** establishes the baseline — where revenue teams actually stand, past the LinkedIn theater.
- **Chapter 2** confronts the performance question head-on: what impact AI has delivered and whether teams are measuring it in a way that would pass a CFO review.
- **Chapter 3** makes the structural argument at the heart of the report: the shift from a system of record to a system of context.
- **Chapter 4** asks who owns this and why the answer is usually "no one."
- **Chapter 5** turns to people and org design, including the one talent question no leader has solved.
- **Chapter 6** examines what AI can't replace and where leaders draw the line.
- **Chapter 7** closes with the barriers, the investment outlook, and a 90-day plan to start.

The argument runs in one direction throughout. The leaders pulling ahead aren't the ones with the most sophisticated stack. They're the ones who own AI personally, measure it by revenue rather than hours, connect their data before adding intelligence, and rebuild their teams around leverage rather than headcount. Everyone has the tools. Very few have the operating model. That difference is the whole report, and the window to act on it is roughly the next 12 months, while most of your peers are still reporting adoption rather than outcomes.

Chapter 1

Where revenue *teams stand in 2026*

Before any argument about architecture, ownership, or org design can hold, one question has to be answered honestly: where are revenue teams actually standing right now? Not where they say they are on LinkedIn. Not where the loudest vendor case study suggests. Where the median revenue leader, looking at their own team's Monday morning, would have to admit they are. This chapter sets that baseline. Every later finding is measured against it.

The state of AI adoption

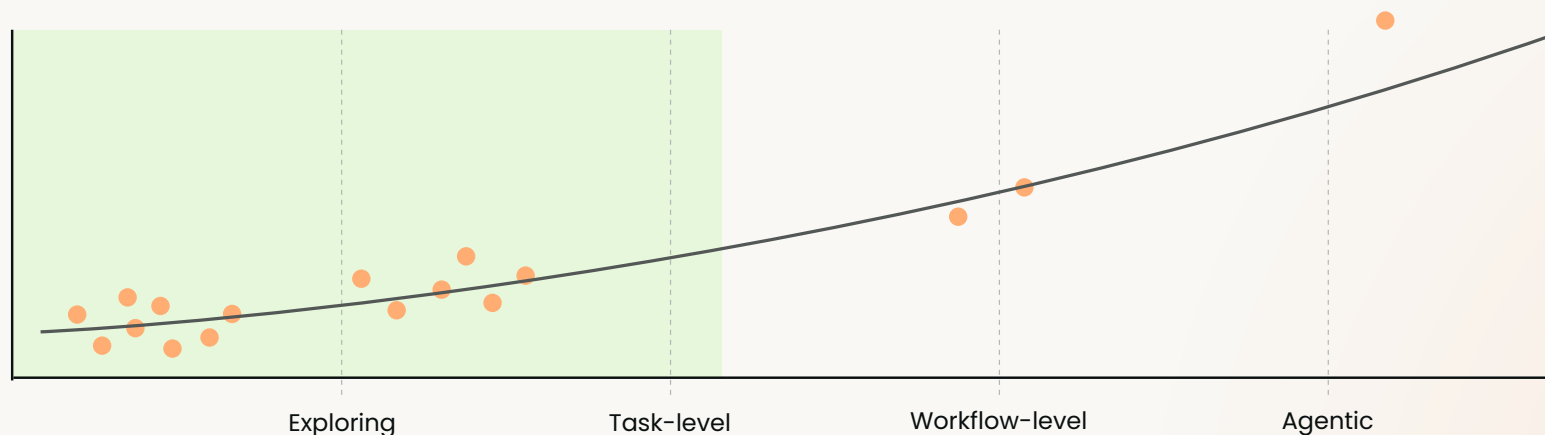
Ask a room of revenue leaders whether they've adopted AI and most hands go up. Ask which stage they're at and the picture fragments, because "we use AI" now spans everything from a few reps pasting emails into a chatbot to autonomous agents researching accounts on their own. The phrase has become so elastic it's stopped meaning anything. It's worth being precise about what the stages actually look like on the ground:

Exploring is individual curiosity without a program. A few reps have found ChatGPT useful. Nobody has decided anything. There is no budget line, no owner, and no way to tell you what any of it produced.

Task-level is AI applied to discrete jobs: drafting an email, summarizing a call, and cleaning a list. The work gets faster. The surrounding workflow is unchanged. This is where the tool helps a person do a task they were already doing.

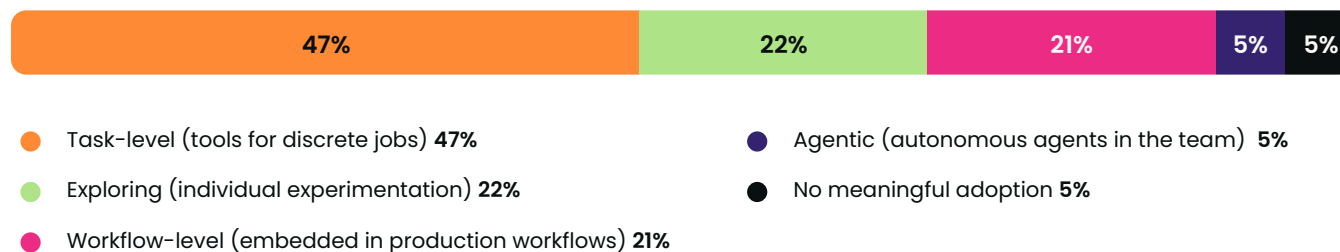
Workflow-level is different in kind, not degree. AI is embedded inside a repeatable revenue process of prospecting, forecasting, and deal execution so the process itself runs differently, not just faster. This is the first stage where AI can touch a revenue metric rather than a time sheet.

Agentic is a model in which autonomous or semi-autonomous agents operate as part of the team, taking action within workflows rather than waiting to be prompted.



Where revenue teams stand in 2026

Wanting to better understand the nature of AI use in revenue leadership in 2026, we surveyed revenue leaders across the globe. Placed on that curve, their teams cluster hard in the shallow end:



Nearly half sit at the task level, and only a sliver describe agentic deployment. Read generously, four in five have started. Read honestly, only about a quarter have pushed AI past discrete tasks into the workflows where revenue is actually made.

What the shallow end actually looks like from the inside is less a strategy than a scramble. Sam Sutton, who runs sales operations across Xero's UK and emerging markets, described the texture of it precisely:



"We've got loads of people doing loads of stuff on AI across our sales, revenue, marketing and customer success teams — and they're doing it with great intent, but very ad hoc, and it's not coherent. There's a bit too much chaos going on that I'd really like to get a hold of."

– Sam Sutton, Head of Sales Operations, UK & Emerging Markets, Xero,
RevOps Summit London 2025

That's task-level adoption in one sentence: real energy, genuine intent, and no coherence — a hundred individual experiments that never add up to a capability. It's the honest description behind the tidy 47% presented in our data, and it previews the ownership vacuum of Chapter 4, because "getting a hold of it" is precisely what no one has been assigned to do.

The distribution matters less than what it hides. Maturity stage tells you what a team is doing. It says nothing about whether any of it is working. This is the trap the chapter exists to expose: adoption and impact are not the same axis, and most reporting collapses them into one.

Consider two revenue leaders, both of whom would tell you they're at "workflow-level," both running AI inside their prospecting and forecasting motions, both reasonably proud of it.

Bolted-on

VS

Rebuilt

The first has bolted AI onto the same process the team ran in 2023. The agents draft more outreach, faster. Reps send more emails. Dashboards light up green, showing more activity, more touches, more meetings booked. But the win rate hasn't moved, cycle time hasn't moved, and when the CFO asks what the AI spend bought, the honest answer is "volume."

The second rebuilt the process around what AI made newly possible. Their agents don't just draft outreach. They research each account against a shared context layer, surface the two accounts most likely to close this quarter, and draft messaging grounded in that specific situation. Reps send fewer emails to better-qualified accounts. The win rate moved. When the CFO asks, they have a number.

Same stage. Same tools. Completely different years. The maturity label captured none of the difference.

A team at "agentic" that can't point to a per-rep gain isn't ahead of a "workflow" team that can. It's just further from the receipts — and possibly deeper into the trap, because sophistication is a very effective disguise for the absence of impact.

 Hyperbound

“Every org moves through the same four stages, roughly in order: core stack, call capture, real practice, then a redesign around agents. According to Gartner’s 2026 C-suite survey, a quarter of sales orgs are seeing a 50%+ positive return on AI spend and a fifth are seeing a 50%+ negative one. The winners systematized how they act on the data. They get it to frontline managers, they use a rep’s own history to show them why one behavior needs to change, and they check the live calls afterward to see whether it did. Without that last part you have insight, not impact.”

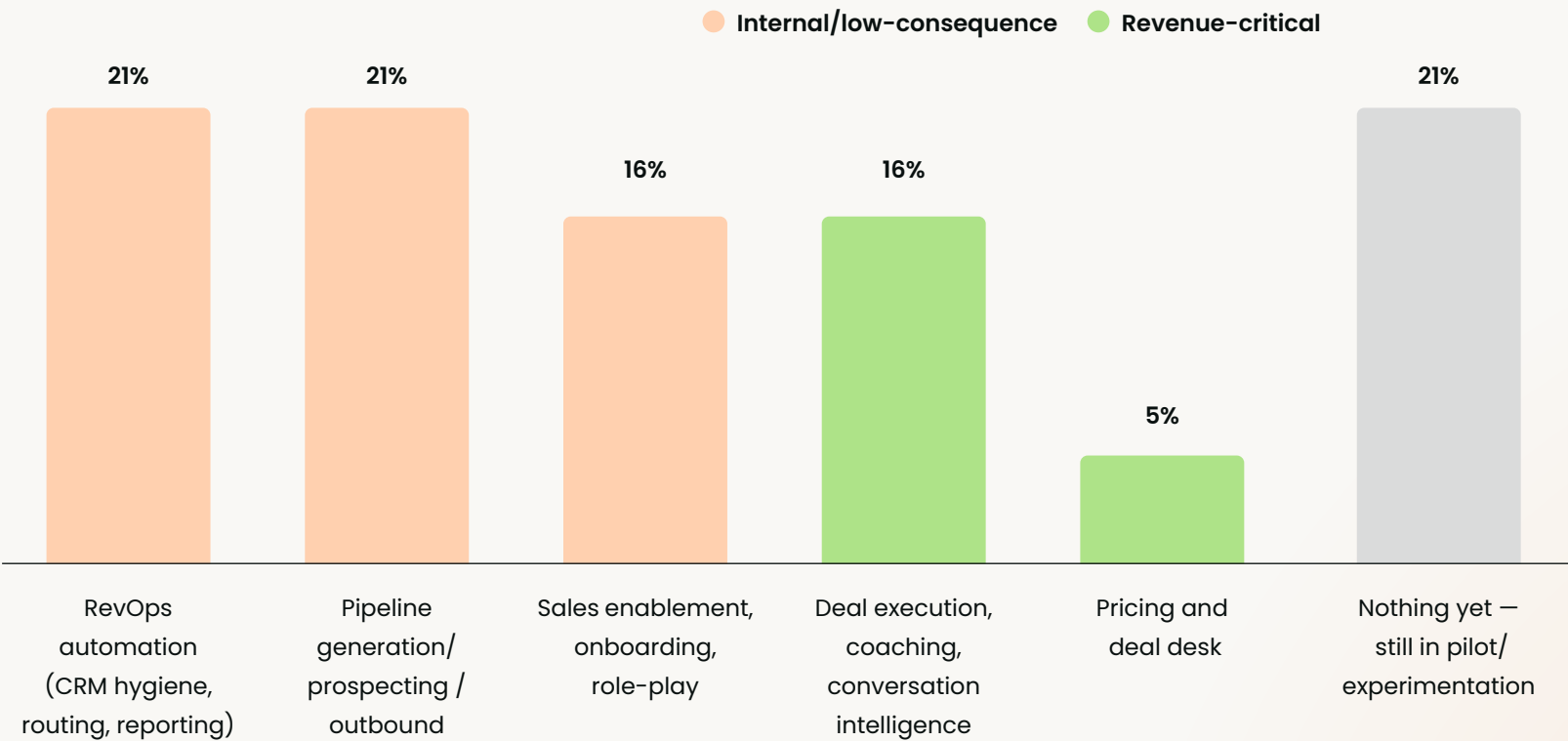
– Atul Raghunathan, Co-CEO at Hyperbound

One cut is worth flagging because it runs counter to the intuitive story. Task-level adoption is evident across all revenue bands, including the largest companies surveyed. If size bought maturity, the biggest organizations would sit furthest along. They don’t — the largest firms in the sample are as likely to be stuck at the task level as the smallest.

Directionally, this points to what the rest of the report argues: the constraint on AI progress is organizational, not budgetary. A billion-dollar company has the money to buy any platform on the market, yet it still runs its AI through the same siloed process a ten-person team does. Resources don’t move you up the curve. Decisions do.

Use cases in production

“We use AI” also hides where. A team automating internal CRM hygiene and a team running agentic prospecting against live accounts are having completely different years, even if both check the same box. So we asked our surveyed revenue leaders to name what’s genuinely in production — not in pilot, not in a slide, actually running — across the revenue motion.



Where revenue teams stand in 2026

The signal is in the shape, not the ranking. Production clusters in internal, low-consequence territory — cleaning the CRM, drafting outbound, and building enablement content.

These are the areas where a mistake is cheap and reversible: a mis-routed lead gets rerouted, a clumsy draft gets edited, a bad enablement asset gets ignored. The work that touches the number directly and irreversibly — live deal execution, the price you put in front of a customer — barely registers. Pricing and deal desk, the highest-stakes and highest-leverage use case in the list, is where the fewest teams have dared to put AI into production.

There's nothing wrong with starting in the safe territory. It's exactly where the 90-day plan in Chapter 7 tells you to begin.

The problem is stopping there and calling it transformation.

Internal automation returns hours. It doesn't, on its own, move win rates or cycle time. A team whose entire AI footprint consists of CRM hygiene and outbound drafting has adopted AI while leaving the revenue-critical part of the motion untouched.

And more than one in five have nothing in production at all — their AI lives entirely in pilot. This is the pilot graveyard, and it isn't where the hard problems go to die. It's where the unaccountable ones do. A pilot that never had to survive contact with a real quota, a real forecast, or a real customer is a pilot no one was ever going to ship. It looked good in the demo, it generated a nice internal buzz, and then it sat — because "it works in the demo" was quietly allowed to stand in for "it moves the number," and no one forced the question.

The architecture argument in Chapter 3 explains the deeper mechanism — why so many of these pilots die in the graveyard rather than a step later. For now, the baseline is set: a market that is broadly adopting AI and narrowly converting it. High adoption, low conversion. Everyone is in. Almost no one is paid yet.

Chapter 2

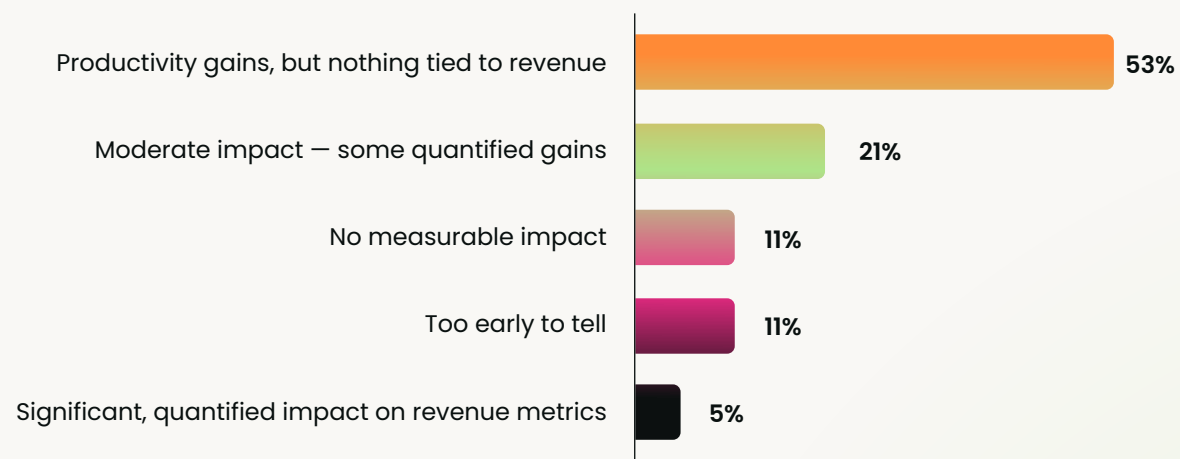
Performance, *metrics, and ROI*

Chapter 1 showed where teams stand. This chapter asks the only question a board cares about: is any of it working, and can you prove it in a way that survives a CFO?

Performance, metrics, and ROI

The impact gap

Here's the headline finding of the entire report, and it's stark. When asked what measurable business impact AI has delivered so far, this is what our surveyed revenue leaders revealed:



Over half have made their teams busier without being able to connect it to any dollar amount. Just one in twenty can stand in front of a board and demonstrate a significant, quantifiable revenue impact. Adoption is nearly universal; conversion is a rounding error.

Picture the disconnect as it actually plays out. A revenue leader walks into the quarterly board meeting with a strong AI story: the team saved hundreds of hours, adoption is high, everyone's using it. The dashboard is green. Then the CFO asks the only question that matters — "so what did it do to the number?" — and the room goes quiet. The team is faster at the things it was already doing, and the pipeline looks about the same. That's the productivity-only result, and it's the majority experience. It's not a failure of effort. It's a failure of design.

Performance, metrics, and ROI

Because the instinct is to read the productivity-only majority as “on their way” — a waypoint on the road to revenue impact — some are. But for most, productivity that never converts isn’t a waypoint at all. It’s a destination they get stranded at because nothing in their operating model translates saved hours into revenue.

The hours get reabsorbed into more of the same kind of activity, and the number never changes. What the escape from that trap looks like was described by Danny Lenz, who leads revenue operations at Dell:



“Once the AI agent was connected to our data, it augmented our sales force. Our productivity skyrocketed, and our close rate skyrocketed — because by the time a customer engaged with a human, that human was ready to close immediately.”

– **Danny Lenz, Senior Director of Revenue Operations, Dell, RevOps Summit Austin 2026**

Notice the two words that do the work: close rate. Not logins, not hours — a revenue metric a board recognizes on sight. And notice the precondition that made it possible: the agent was “connected to our data.” That is the difference between the 5% and the 53% in one sentence.

Rather than opting to deploy AI faster, Danny’s team chose to wire it into their data so it could sharpen the moment that actually decides revenue — the human conversation — rather than just generating more activity around it. The productivity gain and the close-rate gain arrived together precisely because the AI was connected to something real, which is the whole argument of Chapter 3 arriving early.

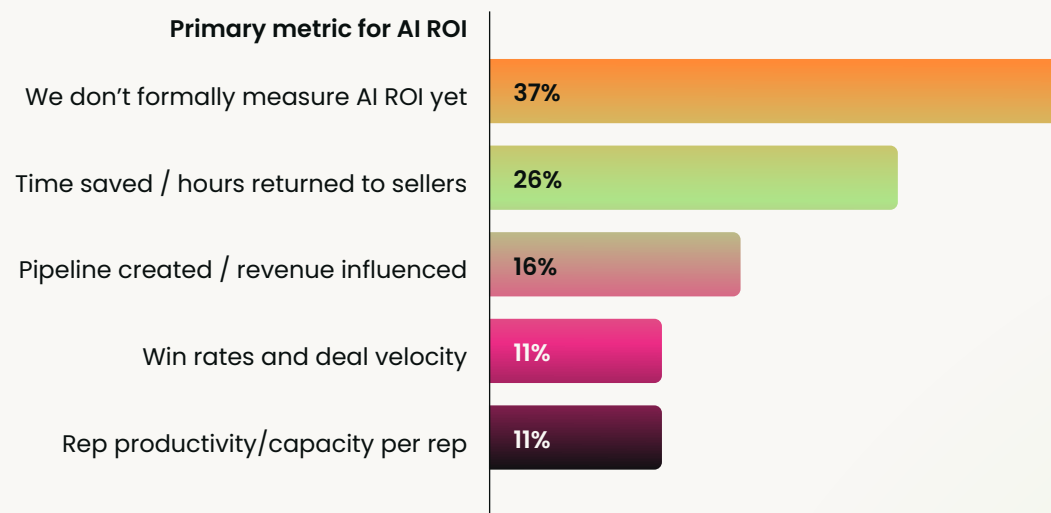
The directional cut in our data points the same way. The leaders reporting moderate-or-better impact are disproportionately the ones who named a revenue-linked metric and who have a clear owner for AI; the productivity-only and no-impact group skews toward teams with no owner and no revenue metric at all.

These are directional signals rather than definitive splits, but they align with Danny’s experience. What you measure determines what you can see, and what you can’t measure, you can’t defend.

Performance, metrics, and ROI

How teams are measuring AI

Ask a revenue leader which metric proves their AI is working, and the answers scatter:



More than a third measure nothing at all. Of those who measure anything, the single most common metric is hours saved, the metric that looks like ROI without ever connecting to it. A little more than a third track a metric that touches revenue.

Performance, metrics, and ROI

Hours are not worthless. They're just not the point, and the discipline that separates the two is less about sophistication than about choosing the metric that serves the decision.

Jiaxi Zhu, who leads analytics and insights at Google, put the principle sharply:



"Complexity doesn't always translate into decisions. About eighty percent of the time, people disagree not on the decision but on the data. So we intentionally chose the simpler model — the one that served the decision we actually needed to make."

– Jiaxi Zhu, Head, Analytics & Insights, Google, RevOps Summit Silicon Valley 2026

Jiaxi's point cuts directly at the measurement trap. A more elaborate metric isn't a better one; the right metric is the one that resolves the decision in front of you, and the decision a revenue leader faces is always "did this move the number?" Everything else is complexity that doesn't translate.

Her second observation is just as important: most disagreement is about the data, not the decision. Teams argue endlessly about whether the AI "worked" precisely because they're each pointing at a different, unagreed metric. Settle on the decision-serving number first, and the argument dissolves.

There’s a ladder between an hour saved and a dollar earned, and most teams instrument the bottom rung and stop:



← Most teams stop here

Teams measuring hours count the first rung and call it the climb. That’s precisely why so many can report “productivity gains” and “nothing tied to revenue” in the same breath: they instrumented the input and never instrumented the outcome, so they can see the hours leave and never see whether anything arrives.

The fix inverts the whole exercise. Instead of deploying AI and then hunting for a metric to justify it, you name the revenue outcome you’re trying to move before you deploy, then choose the use case and the instrumentation that will demonstrate it.

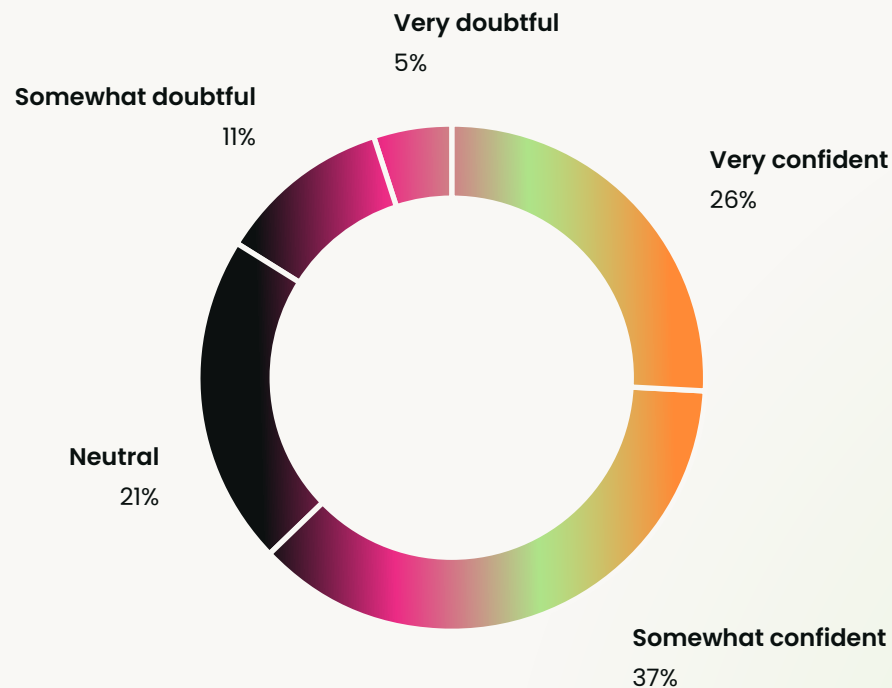
If the outcome is cycle time, you baseline cycle time first. If it’s win rate, you baseline win rate first. The metric isn’t an afterthought you reach for at the board meeting. It’s the design constraint, the decision-serving number, in Jiaxi’s terms, that you start from.

Performance, metrics, and ROI

Proving ROI to leadership

The measurement gap becomes a leadership problem the moment you walk into a board meeting. And here, the survey surfaces the tension that defines 2026 for revenue leaders: a **proof gap** sitting beneath a wall of confidence.

Asked how confident they are that AI investments will deliver measurable revenue impact in the next 12 months:



Nearly two-thirds are confident. Recall that only one in twenty can currently show significant revenue impact. Confidence is running an order of magnitude ahead of proof.

Performance, metrics, and ROI



One directional pattern worth naming because it points to where that confidence is earned rather than borrowed: the doubt in these numbers sits almost entirely with teams that have no owner for AI. Leaders with a named owner — themselves or RevOps — land on confident or neutral, effectively never on doubtful.

The reading is intuitive. A leader who owns AI knows what's deployed, what it's producing, and what's coming next, so their confidence rests on visibility. A leader in an ownership vacuum is either optimistic on faith or openly unsure, because no one in the org can tell them where things actually stand. Confidence, in other words, tracks ownership — which makes the ownership vacuum of Chapter 4 a proof problem as much as an execution one.

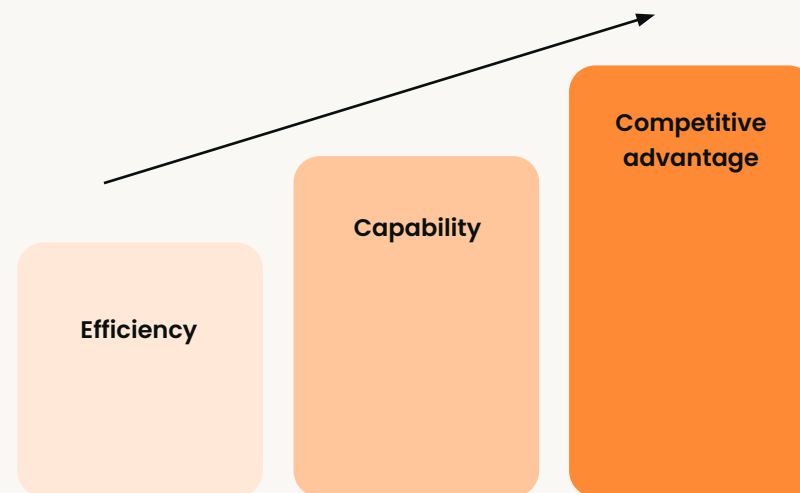
That gap is survivable if you close it deliberately and dangerous if you don't. A board will extend patience once, based on a credible plan. It will not extend it twice against a track record of confident forecasts that never materialized in the numbers. The way to spend the patience wisely is to stop making a single vague promise ("AI will drive growth") and instead match your claim to your situation. There are three honest conversations a revenue leader can have with a board, and the mistake is having the wrong one.

"If a rep gets time back because AI is handling their admin, their research, and reminding them of the deal context to date, their pipeline and quota should increase. Otherwise, AI gave them a break, not a result. The teams that get this right are the ones asking what a seller should be able to carry once the busywork is gone, and building toward that number with the help of AI."

– Sahil Aggarwal, CEO & Co-founder, Von

The three claims you can defend

- **If you're targeting efficiency**, you tell the board plainly that AI is buying time and leanness, not competitive separation. The commitment is to return meaningful selling hours per rep each month and redeploy them into pipeline coverage so the team can hold output while spend tightens, with no promise that win rate moves this year. This is a legitimate, defensible claim. The failure mode is dressing it up as competitive transformation and then being unable to show the transformation.
- **If you're targeting capability**, the promise is more ambitious but still bounded. You commit to doing what was previously impossible by hand — account research and prospecting at real depth — and you expect it to surface first as improved conversion on targeted accounts over the next two to three quarters, measured against a control. This claim buys more time and demands more proof. Set the baseline and the control before you deploy, or you'll have a capability and no way to prove it earned anything.
- **If you're targeting a competitive advantage**, you make the largest promise of all: a rebuild of the revenue operating model to move faster than competitors can. It is a twelve-to-eighteen-month effort, it involves real organizational change, and the payoff is win rates and cycle times peers can't match. This is the highest-stakes framing. Make it only if your ownership, data, and appetite for change can actually support it and expect the board to hold you to it.



The common thread across all three is to name the outcome you're buying, set the metric before you deploy, and report against a baseline. The leaders who keep their budget are the ones who make the honest trade explicit. The ones who lose it are the ones who kept promising revenue impact while reporting login rates.

Chapter 3

Architecture: *from system of record to system of context*

Architecture: from system of record to system of context



TRACTION
complete

This is the structural argument at the center of the report. Every finding so far — the pilot graveyard, the impact gap, the productivity that won't convert — has the same root cause. Revenue organizations have spent fifteen years building systems of record: places to store data.

The CRM, the marketing automation platform, and the data warehouse. These systems are very good at holding information and almost useless at making it mean anything. They stated that an account downloaded three assets and attended a webinar. They don't know what that account is trying to accomplish, where it is in its decision, or what would move it.

AI needs the thing those systems were never built to provide: a system of context, a shared, continuously updated layer of business meaning that sits above the records. It holds the things a good rep carries in their head and a CRM never captures: what your ideal customer actually looks like, who the personas in a buying group are and what each one cares about, the history and current state of each account, and the live signals that indicate movement.

Crucially, it is consumed by both humans and agents. The rep and the agent work from the same understanding of the account, rather than each reconstructing it from scattered records.

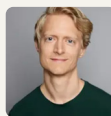
"No agent is smarter than the data it runs on. Every company we talk to is under pressure to deploy AI, and most are aware their CRM data can't support it."

— David Nelson, CEO, Traction Complete

Architecture: from system of record to system of context

Bolt AI onto the system of record without building the system of context, and you don't get intelligence. You get faster chaos. An agent querying siloed, context-free data produces confident output built on a partial picture, and it produces it at scale.

The teams that avoided this got the foundation right first, while others chased the flashiest capability. Andreas Madum, who runs commercial operations globally at Uber, makes the point directly:



“The real change of AI isn't all the flashy stuff — it's doing the basics exceptionally well. The real money is in setting yourself up to do things the way you want to for the long term. Getting that foundation right becomes the differentiator between companies that can scale and companies that can't.”

– **Andreas Madum, Director, Global Head of Commercial Operations, Uber,
RevOps Summit New York 2026**

Sit with the last line: the foundation is the differentiator. Not the model, which everyone can rent; not the flashy demo, which everyone can run. The teams that scale AI are the ones who built the context layer that lets it work, and the teams that can't are the ones who bought the agent and skipped the architecture.

This is the deeper mechanism behind the pilot graveyard from Chapter 1: pilots built on top of silos produce plausible-looking output that falls apart the moment it meets a real account, because the underlying context was never there. The pilot doesn't fail loudly. It just never gets trusted enough to ship — and, as Andreas says, the money was never in the pilot anyway. It was in the foundation the pilot was supposed to prove out.

Architecture: from system of record to system of context



 Hyperbound

Where teams are on the architecture curve

If the context layer is the prerequisite for impact, almost no one has built it. The adoption curve from Chapter 1 doubles as an architecture curve. The task-level and exploring teams — roughly two-thirds of the field — are working directly on top of systems of record, with AI reaching into siloed data, one query at a time, with no shared context to ground it.

The workflow-level teams have begun stitching context into specific repeatable processes, even if they haven't built a general layer. Only a sliver describes anything approaching an agentic architecture, in which agents operate continuously against a shared context.

The directional read that matters: the leaders reporting significant revenue impact skew to the workflow level and above, while the productivity-only and no-impact teams sit overwhelmingly at the task level and explore. This is a directional signal, not a verdict.

But it's the same signal Andreas names from the stage — the foundation is the differentiator — and it is internally consistent: the teams that built context are the teams seeing outcomes, because context is what lets AI touch a decision rather than just a task. Teams that put agents on top of silos get amplified noise. Teams that build the context layer first get leverage. The architecture is upstream of the outcome, which means no amount of better tooling rescues a team that skipped it.

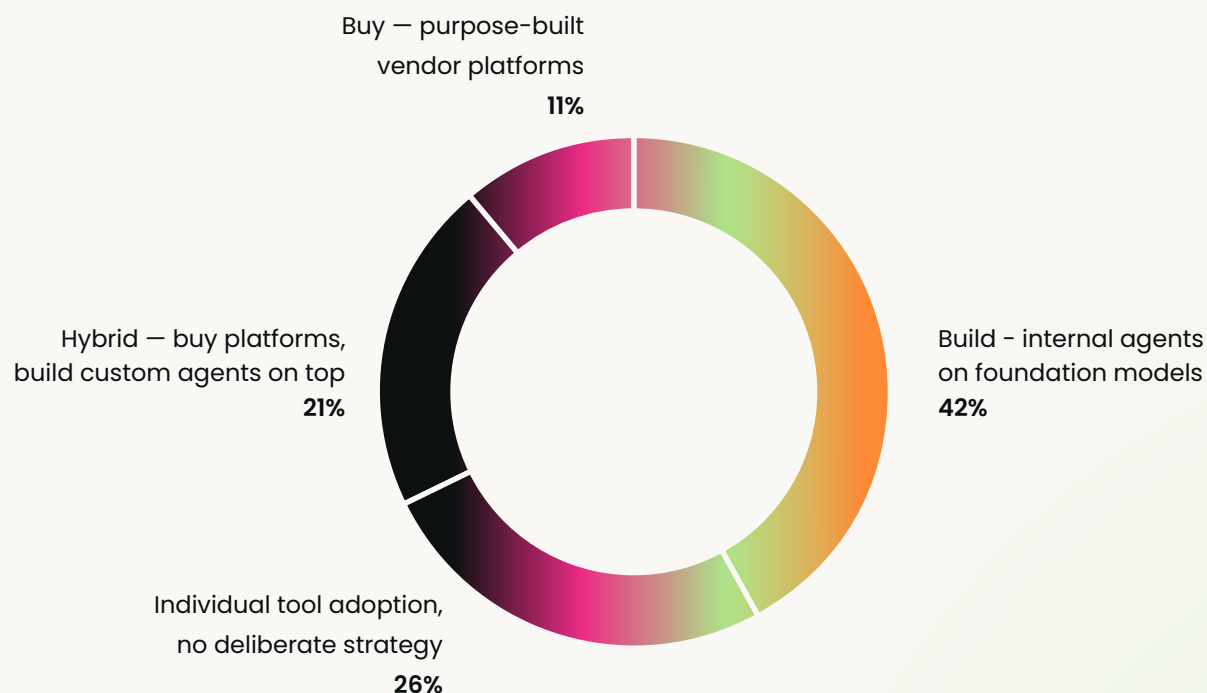
“The customers who’ve stuck with this longest aren’t the ones who talk about ‘AI transformation.’ They’re the ones who can tell you exactly how many reps closed a specific coaching gap this quarter, because they measured the before and after. That specificity gets them a bigger budget for the next year. If you can’t name the metric before you deploy, you won’t be able to defend it after and that’s the difference between a revenue leader who keeps their board’s trust and one who’s explaining, a year from now, why the confidence never turned into numbers.”

– Sriharsha Guduguntla, Co-CEO, Hyperbound

Architecture: from system of record to system of context

How teams are acquiring AI capability

Where a team chooses to source its AI tells you where it believes the defensible advantage lives:



The headline is both encouraging and misleading. Build leads decisively – nearly two-thirds are building or hybrid – which reflects a correct instinct that the durable advantage is in what you construct on top of the models, not in the models themselves. Everyone can rent the same foundation model. Only you can build the context layer and the agents that run on your specific ICP, your specific playbook, your proprietary win/loss history.

There's a useful way to think about which posture fits which situation.

Architecture: from system of record to system of context



 Hyperbound

Buy: Makes sense where the problem is common and well-solved — conversation intelligence, forecasting hygiene, and where you have no appetite or capacity to build.

Build: Makes sense where the advantage is proprietary agents trained on your context that a competitor couldn't replicate by buying the same tool.

Hybrid: Buy the commodity layer and build the differentiated layer on top; this is where most sophisticated teams land because it lets them move fast on the generic and slow on the defensible.

The data hints at why hybrid is the sophisticated choice. Cross the acquisition approach against reported impact and one directional pattern emerges: the only team pointing to significant revenue impact took a hybrid path, while teams pursuing pure build skew heavily toward productivity-only. That fits the logic.

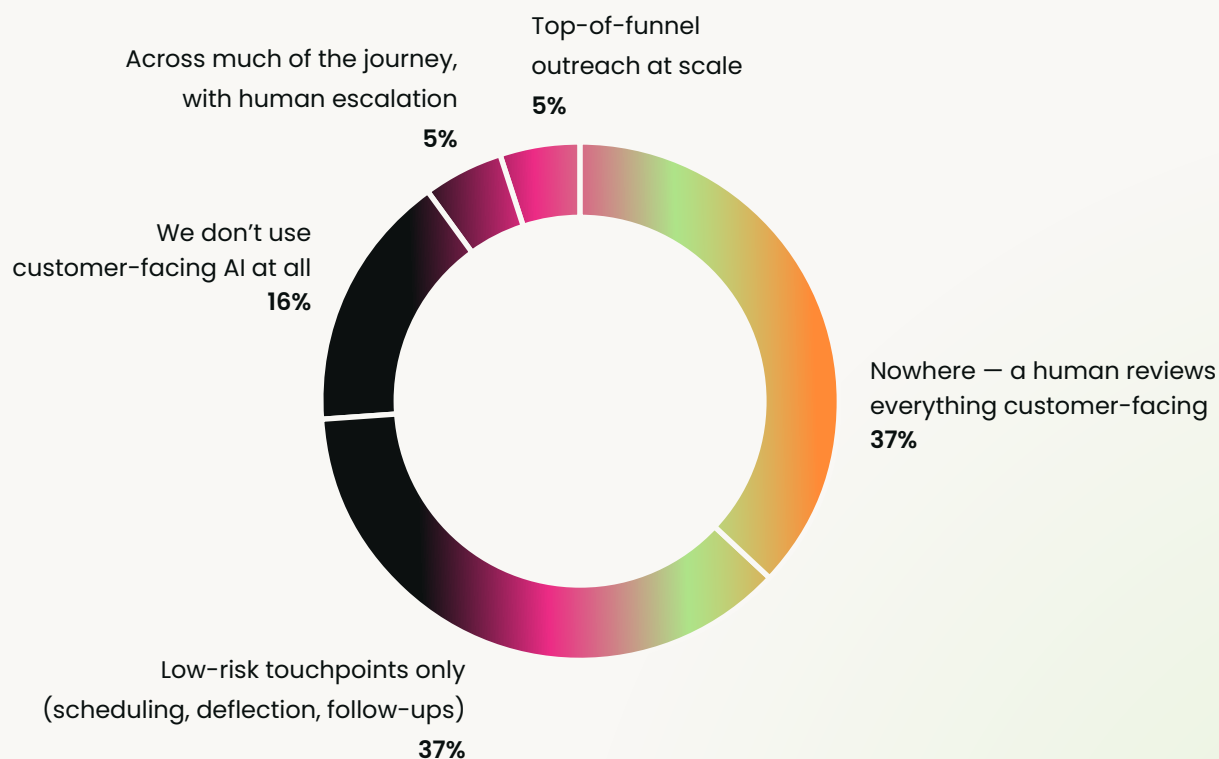
“The sophisticated teams aren't debating build versus buy. They're segmenting the stack. Own the unified interface. Buy the annoying commodity layers like enrichment and engagement. Buy Revenue Activation where the problem generalizes across customers. Build the agents that are specific to your business context: your content layer, your product usage signals, the stuff only you can train. The 26% with no strategy aren't choosing wrong. They're not choosing at all. And that's how you end up with a dozen AI tools, zero integration, and no measurable impact on the number.”

- Atul Raghunathan, Co-CEO at Hyperbound

Architecture: from system of record to system of context

Trust, safety, and where leaders draw the line

The clearest signal of how much leaders actually trust AI is where they'll let it act autonomously. Our surveyed revenue leaders tell us that means almost nowhere near a customer:



Nearly three-quarters keep AI at “nowhere” or “low-risk only.” Only a small pool of leaders extend it meaningfully into the customer journey. That conservatism is rational, trust in autonomous action should be earned on evidence, not assumed on enthusiasm, but it is also, mathematically, the ceiling on impact.

AI confined to scheduling links and follow-up emails can only ever return hours. It is structurally incapable of touching win rates or cycle time, because it never gets near the moments when deals are won or lost. This is a large part of why so many teams are stranded in productivity-only: they've drawn the trust boundary so tightly that AI can only reach the low-value, low-risk edges of the motion.

The survey bears this out in the most striking cross-tab in the report. The handful of teams that have extended autonomy beyond low-risk touchpoints are disproportionately the ones reporting moderate-to-significant impact.

The teams holding AI at “nowhere” or “low-risk only” cluster almost entirely in productivity-only.

Given how few teams have crossed that line, this is a directional signal rather than a proven law — but it's the clearest evidence in the data for the chapter's central claim: impact lives on the far side of the trust boundary, and teams that never move the boundary never reach it. Autonomy also tracks maturity, as you'd expect — the teams extending it are the ones already at workflow level, because they're the ones who built enough context to trust the AI with more.

There is no contradiction between “be careful” and “extend the boundary.” The two reconcile in a single principle, which Chapter 6 develops in full: you extend autonomy exactly as fast as the context layer earns it, and not one step faster. A team with a mature context layer and a track record of reliable agent output has earned the right to let AI handle more of the journey. A team running agents on top of silos hasn't, and its conservatism is correct.

The trust boundary is where the impact gap and the architecture argument meet — you can't safely widen it until you've built the context that makes AI trustworthy, which is one more reason the architecture comes first.

Chapter 4

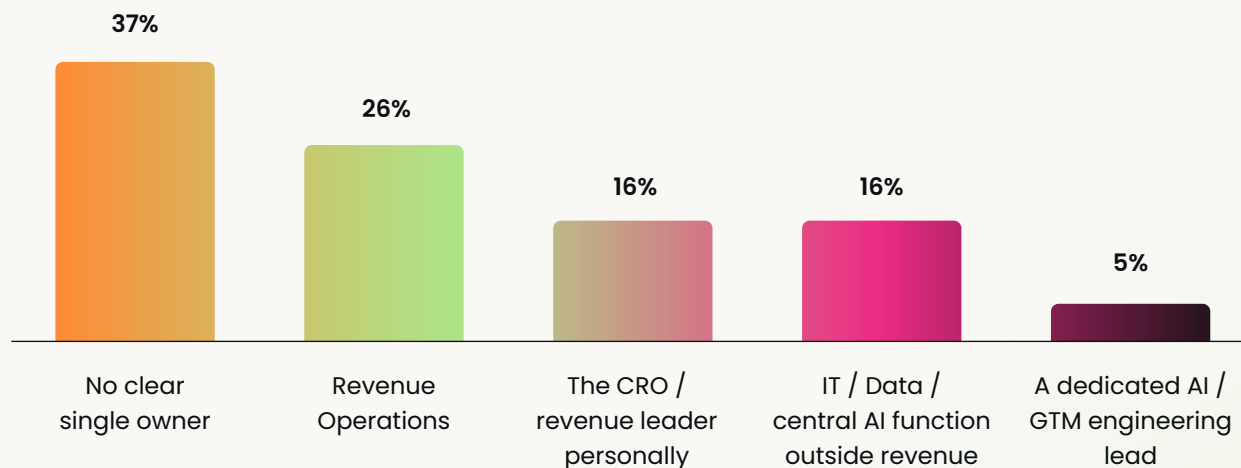
Who owns AI? *The revenue leader's new mandate*

Every thread so far – the ownerless teams stuck at task-level, the missing revenue metrics, the unbuilt context layer – points back to one variable. Someone has to own this. In most revenue organizations, no one does.

Who owns AI? The revenue leader's new mandate

Ownership in practice

The single most common answer to “who owns AI strategy for the revenue org” is nobody:



More than a third of revenue organizations have an ownership vacuum. And the vacuum is not neutral.

In our data, the no-owner teams cluster at task-level adoption and at productivity-only-or-worse impact, while the teams where the revenue leader or RevOps owns it reach higher up the maturity curve and achieve measurable impact. This is directional, but it is the most consistent signal in the survey, and it is not difficult to see why.

AI in the revenue org doesn't fail lacking enthusiasm. It fails to have a person whose job it is to decide which workflows to rewire, in what order, against which revenue metric, and to defend the answer to the CFO.

Absent that person, AI defaults to what the ownerless teams have: scattered tool adoption, no context layer, no revenue metric, and no story for the board.

Duane Dufault refuses to delegate it, and the specificity of his example is the point:



"When it comes to revenue, we as CROs own AI for revenue. We've gotta get our hands dirty... I took it off their plate and then went and bought a MacBook and figured it out."

– Duane Dufault, Chief Revenue Officer at Time Doctor,
CRO Summit Silicon Valley 2026

"Bought a MacBook and figured it out" is not a throwaway line.

It's a description of the mandate. Owning AI for revenue is not sponsoring an initiative from a distance or approving a budget.

It's getting hands-on with the tools, building the first agent yourself, understanding viscerally what they can and can't do, so that when you set the strategy, you're setting it from knowledge rather than from a vendor deck.

The leaders seeing impact treat AI fluency as a core part of the job, the way an earlier generation of revenue leaders learned to read a forecast or run a pipeline review.

The common instinct to route AI to IT or a central data function is understandable and, for the revenue org specifically, usually wrong. IT can and should own the infrastructure, the security, and the model access.

What IT cannot own is the judgment that actually creates value:

which revenue workflow is worth rewiring, what "better" looks like in pipeline terms, and how to sequence deployment so that trust builds before the stakes rise.

That judgment is inseparable from running a revenue number, which means it is the revenue leader's job, and it does not survive being handed off to a function that doesn't carry the quota.

The competitive framing

Ownership becomes urgent the moment you frame the stakes correctly — and most leaders frame them wrongly. The reflexive fear is that a competitor will buy a tool you don't have.

But the tools are commodities; your competitor can buy the same platforms you can, from the same vendors, tomorrow. The real threat is quieter and more dangerous: a peer who learned to use the tools and pulled ahead of the peers who didn't. Gaytri Khandelwal names it exactly:



"Our competition here is not the other company. It's the CROs who are AI-aware versus those who still use the playbook we used in 2021. The onus is on us to stay abreast of the technology and be ready to drive adoption."

– **Gaytri Khandelwal, Chief Revenue Officer, Crest Data, CRO Summit Silicon Valley 2026**

The "2021 playbook" is the sharp end of the observation. A revenue leader running today's motion on 2021 assumptions — more reps equal more pipeline, activity equals progress, tools are something you buy and forget — is not losing to a competitor's product. They're losing to a competitor who rebuilt their operating model while the first leader was still treating AI as a line item.

This reframes the ownership vacuum from an administrative gap into a compounding competitive liability.

When AI is genuinely commoditized — same models, same tools, available to everyone — the differentiator relocates entirely to the operating capability wrapped around it: whether a leader owns it personally, how fast they move from insight to action, whether they've built the context layer, whether they've rebuilt the team.

And that capability compounds. The leader who buys the MacBook and figures it out this quarter builds context, learns what works, trains the team, and starts the next quarter further ahead, while the leader still waiting for the ownership question to answer itself falls another quarter behind. The advantage isn't the tool.

It's the head start in learning how to use it, and head starts in a compounding system don't stay small.

Chapter 5

People, org design, *and the talent question*

 Hyperbound

If the revenue leader owns AI and builds the context layer, the team itself changes. The question is how — and the survey suggests the change is real but earlier and more uneven than the discourse implies.

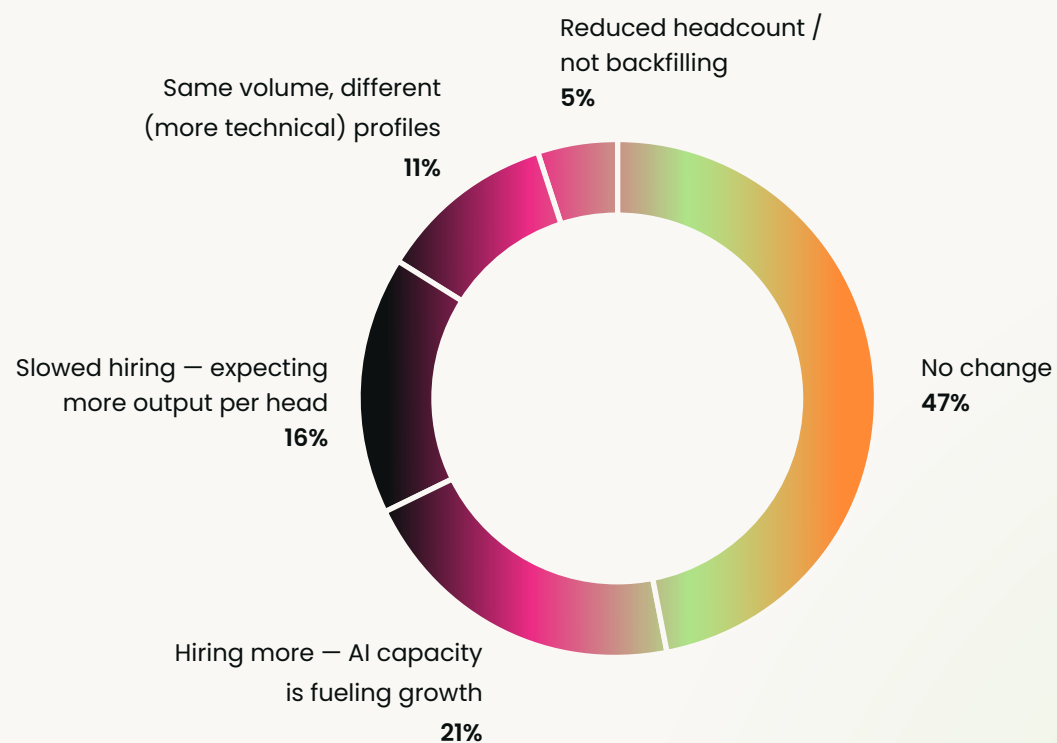
“The scarcest role in the revenue org right now isn’t the AI-native seller. It’s the GTM engineer. Someone who can build the context layer, train the agents, and own the technical architecture that turns commodity AI into proprietary advantage. You can buy platforms, but you can’t buy this person’s judgment about what agent to build for which part of your motion. The 47% who report no hiring changes? I’d bet most of them don’t have this role defined yet, and that’s why they’re not restructuring.”

– Atul Raghunathan, Co-CEO at Hyperbound

People, org design, and the talent question

How AI is changing the team

Most teams have not yet restructured. Asked how AI has changed hiring plans:

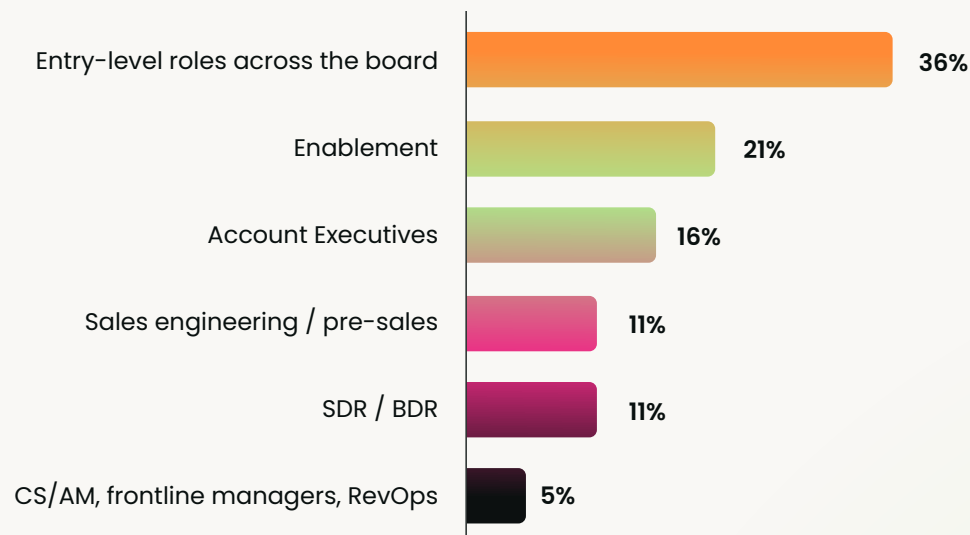


Nearly half report no change at all, a useful corrective to the louder narrative that AI has already gutted the revenue org. It hasn't, yet.

The restructuring of the summit stages described is, so far, the leading edge rather than the norm: a handful of slow hirings anticipating more output per head, a few shifting toward more technical profiles, and a small minority actually reducing headcount.

People, org design, and the talent question

But where change is happening, it points consistently in one direction, and the roles already absorbing the impact tell the story:



Entry-level roles and the SDR/BDR function absorb the most impact, precisely the rungs whose work (research, list-building, first-touch outreach, qualification) AI most easily replicates. This is not random. It's the leading edge of a structural change Gaytri describes bluntly:



"With AI, it's no longer about more reps — it's about more leverage. Gone are the days when we had BDRs, SDRs, inside sales, and someone running campaigns; many of these roles are being combined. We're looking for the full-stack salesperson."

– Gaytri Khandelwal, Chief Revenue Officer, Crest Data, CRO Summit
Silicon Valley 2026

Two new roles emerge from this consolidation.

Full-stack seller Makes agents more productive	VS	GTM engineer Makes the agents
The full-stack seller is the collapse of the old assembly line — research, prospecting, campaign execution, closing — into a single person who runs the whole motion with AI leverage across all of it. Where a pipeline used to require an SDR to prospect, a rep to close, and someone to run the campaigns behind them, one capable seller with a well-built agent stack now spans the lot.		The second role is quieter but arguably more important: the GTM engineer, who pairs go-to-market judgment with technical skill and builds, trains, QAs, and monitors the agents the rest of the team runs on.

The full-stack seller is the person who makes agents more productive. The GTM engineer is the person who makes the agents. A revenue org serious about AI needs both, and most don't yet have the second.

The survey says the majority of teams haven't made this move. The stage says the teams that have are the ones setting the pace. The direction of travel is clear even if the arrival is uneven: fewer, more capable people operating with far more leverage per head, supported by a technical role that didn't exist on the org chart three years ago.

The two-speed problem

There is a catch in this logic that no one in the room claimed to have solved, and honesty about it is what separates a serious leader from a hype merchant. If AI absorbs the entry-level work, where does the next generation of revenue talent come from? Andrea Marini puts his finger on it:



“The entry-level hiring is being changed right now. Roles where I would have hired entry-level marketing or early BDR, now I’m thinking twice, because I’m already getting those kinds of resources [from AI]. There’s a two-speed world that companies will need to figure out because you still need to get people in.”

– **Andrea Marini, Former Chief Revenue Office at Ferveret, CRO Summit Boston 2026**

This is the genuine open question of 2026, and it is a trap disguised as an efficiency win. The entry-level roles being automated — SDR, BDR, junior rep — are the same roles that historically produced senior sellers.

The BDR seat was never just a cost center; it was the apprenticeship where someone learned the product, the buyer, and the craft of the conversation before graduating into an AE seat.

Automate that seat out of existence entirely, and you win this quarter’s efficiency while quietly draining the pipeline of talent that fills the next five years of AE and management roles.

You will feel brilliant in 2026 and short-handed in 2029.

The survey didn’t surface an organization with a deliberate answer, which is itself worth noting; the industry is optimizing the near term without a settled plan for the long one. The honest position for a revenue leader is to hold two truths at once: automate the entry-level work without eliminating the entry-level apprenticeship.

In practice, that means treating “where does our next senior seller come from” as an explicit strategy question rather than an HR afterthought, whether that’s redesigning the junior role around judgment and customer time instead of grunt work, or using AI to compress the learning curve so juniors get good faster, or deliberately preserving a smaller cohort of entry seats as a talent pipeline even when the pure-efficiency math says cut them.

There is no consensus answer yet. There is only the choice between confronting the question now or paying for ignoring it later.

Chapter 6

What AI can't replace: *the human skills still winning deals*

What AI can't replace: the human skills still winning deals

For all the automation, the survey is emphatic about what leaders will not hand over.
Asked which human skills become more valuable as AI takes on more of the sales process:



What AI can't replace: the human skills still winning deals

The human premium

Relationship-building dominates, and together with trust and judgment, it accounts for the clear majority. Only a sliver believes AI erodes the value of selling skills. Evelina Petrova, who leads revenue operations at Adyen, explains why the premium rises rather than falls:



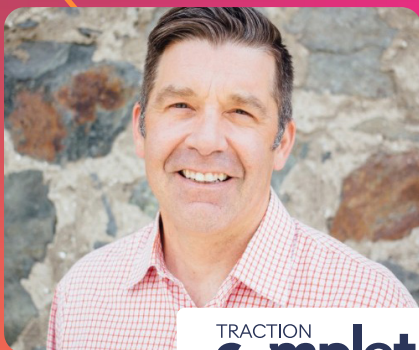
"Historically, revenue teams have spent too much time and cognitive energy on mundane manual tasks, and too little on what's truly important — strategy and relationship-building. For us, AI is a powerful amplifier of human intent and human capability; we don't see it as something that replaces entire categories of roles or people."

– Evelina Petrova, VP Revenue Operations at Adyen, CRO Summit
Amsterdam 2026

Amplifier, not replacement — and notice what it amplifies toward. Evelina's point is that revenue teams have always known relationship-building and strategy were valuable work; they just never had time for it, because the mundane tasks ate the day. AI doesn't create the human premium. It frees it by clearing away the manual work that was crowding it out.

That maps precisely onto what the survey's top skills have in common. Relationship-building, trust, judgment — notice that none of the three is a task. A task has inputs, a procedure, and an output, which is exactly what AI is built to do and exactly why it eats tasks so easily. These three are none of those things.

What AI can't replace: the human skills still winning deals



TRACTION
complete

They are relational and contextual: they depend on being a person a buyer chooses to believe, on weighing a high-stakes call where the “right” answer isn’t in the data, on navigating the politics and personalities of a buying group that no CRM captures.

AI, brilliant at procedure, doesn’t touch them because they aren’t procedural in the first place.

This is why the human premium isn’t nostalgia, and it’s why the survey respondents are right to expect it to rise. As AI compresses the procedural layer of selling toward zero cost — the research, the drafting, the qualification, and the follow-up — the relational layer stops being one part of the job. It becomes the entire differentiated part.

When every competitor’s agent can generate the same well-researched outreach, the deal is won by the human who earned the buyer’s trust, helped them make a hard call, and connected the right people across their organization.

“Today, AI can help fill calendars. But it’s still humans who build relationships and that’s where deals are won.”

– Jayme Smithers, CRO, Traction Complete

The margin migrates to the part machines can’t reach. Automate the bottom of the stack, and the top of the stack is where the whole contest moves.

The trust boundary

The practical version of this is a line every team draws, mostly without naming it: the **trust boundary** — the point beyond which AI is not permitted to act without a human.

Chapter 3 showed how tightly it's currently drawn, with nearly three-quarters of teams keeping AI at "nowhere" or "low-risk only." The useful question is where the boundary ultimately rests. Lauren Sandtorv answers it by running the thought experiment to its limit:

"In 10 years from now, AI does everything. What did we lose as sellers? I keep coming back to three tenets: we build trust with our customers, we help customers make judgment calls, and we connect people throughout the buying organization."

— Lauren Sandtorv, VP Sales at monday.com



 **monday.com**

Even in a world where "AI does everything," **Lauren's** three tenets — trust, judgment, connection — stay above the line.

That's the boundary's final resting place, and it tells you which way to push. The question isn't whether to have a boundary; you should. It's whether you treat it as a wall or a dial.

The mistake most teams make isn't drawing it too tightly at the start; that's prudent.

The mistake is drawing it once and never revisiting it, so a line that made sense when the context layer was immature stays frozen long after the AI has earned the right to more.



TRACTION
complete

Treating the boundary as a dial means having an actual process for moving it. In practice, that means: monitoring the reliability of AI output on the work it currently handles; identifying the next-lowest-stakes task just above the line; testing AI on it with a human reviewing every output; and relocating the boundary outward only once the evidence supports it, then repeating.

“How do you build trust? The humans have to be in the loop. And when the humans in the loop say, ‘why am I here? I’m no longer needed in this loop’ — that’s your insight that you’ve got enough trust.”

– Ernesto Valdes, CTO, Traction Complete

The leaders who extract the most from AI aren’t the ones with the loosest or the tightest. They’re the ones who move it deliberately, on evidence, as the context layer earns confidence, always toward Lauren’s three tenets and never past them. Automate below the line so your people can master above it, and keep moving the line as trust is earned.

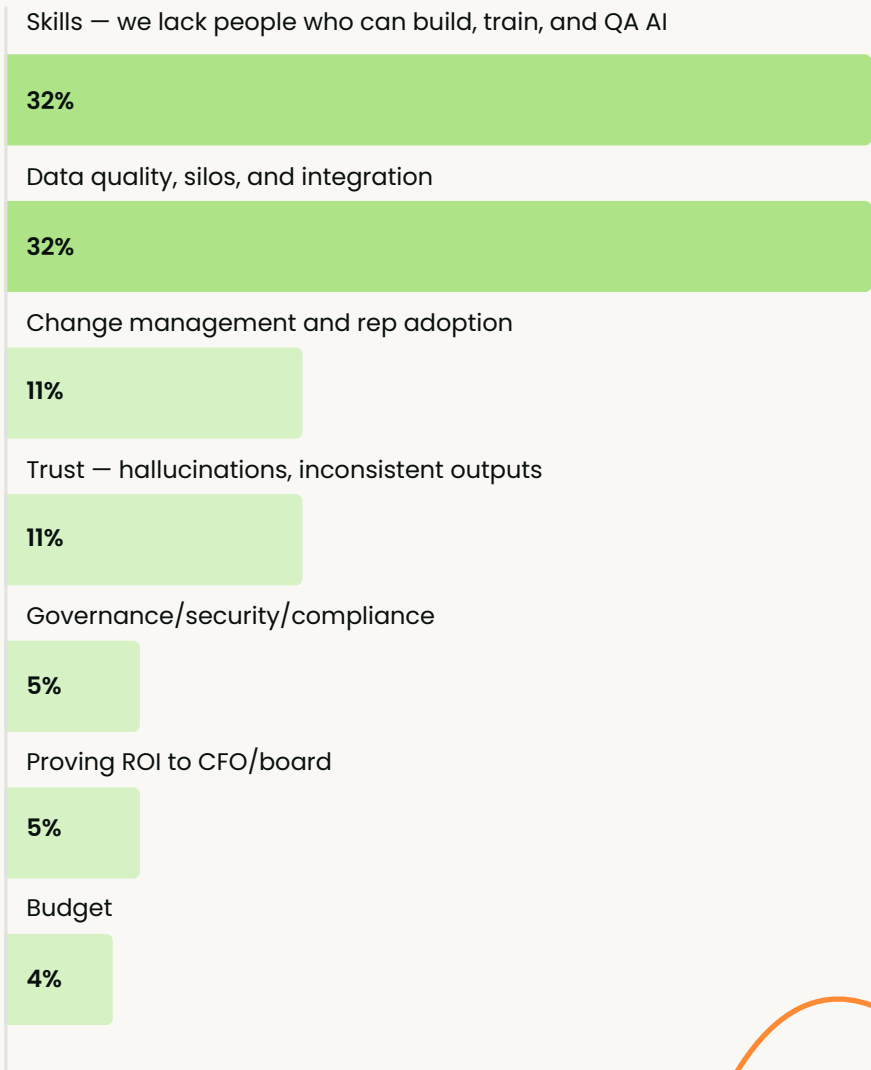
Chapter 7

Governance, the biggest barriers, *and the year ahead*

The final chapter turns from diagnosis to action: what's actually blocking teams, where the money is going, and how to start.

The biggest barriers

Asked for the single biggest barrier to getting more value from AI, leaders split evenly across two answers that turn out to be the same answer:



Skills and data tie for the top spot, and together they account for nearly two-thirds of responses. This is the whole report compressed into one table.

The data barrier is the missing system of context from Chapter 3; teams know their siloed, inconsistent data is what’s holding the AI back. The skills barrier is the lack of a GTM engineer in Chapter 5; teams know they don’t have the people to turn a model into a working, trusted agent.

Neither of these is a technology problem you can buy your way out of. Both are operating-model problems, and both are squarely inside the revenue leader’s power to fix: you can invest in the context layer, and you can hire or develop the GTM engineer.

The most telling entry is the one at the bottom. The budget comes dead last, tied with governance and ROI-proof at the lowest level of concern. Revenue teams are not saying “we would do more with AI if we had more money.”

They’re saying the money isn’t the constraint — clean, connected data and the people who can build on it are. That should reframe where a revenue leader spends their next dollar and, more importantly, their next hour of attention. Pouring budget into more tools while the data stays siloed and the skills stay absent is spending against the wrong barrier entirely.

 Hyperbound

“Teams don’t have the context layer that connects their siloed data, and they don’t have the GTM engineer who knows how to build agents on top of it. And neither is really a budget problem. It’s architecture and talent. You can’t buy the context layer off a shelf, and you can’t hire the GTM engineer from a standard sales recruiting pipeline. Both require deliberate investment in capabilities most orgs haven’t built yet.”

– Atul Raghunathan, Co-CEO at Hyperbound

The barrier also moves as teams mature, which tells you what “progress” actually looks like. Data quality dominates among the task-level teams, the ones still working on top of systems of record, feeling the silos directly. The more advanced teams have largely moved past data as their headline blocker, citing governance and change management instead.

That shift is the tell: you don’t graduate from the data problem by buying a better tool; you graduate by building the context layer, at which point your problems become the more mature ones of governing autonomous systems and bringing the team along. If data quality is still your top barrier, the survey’s own maturity gradient says you’re early — and the way forward is the architecture of Chapter 3, not another point solution.



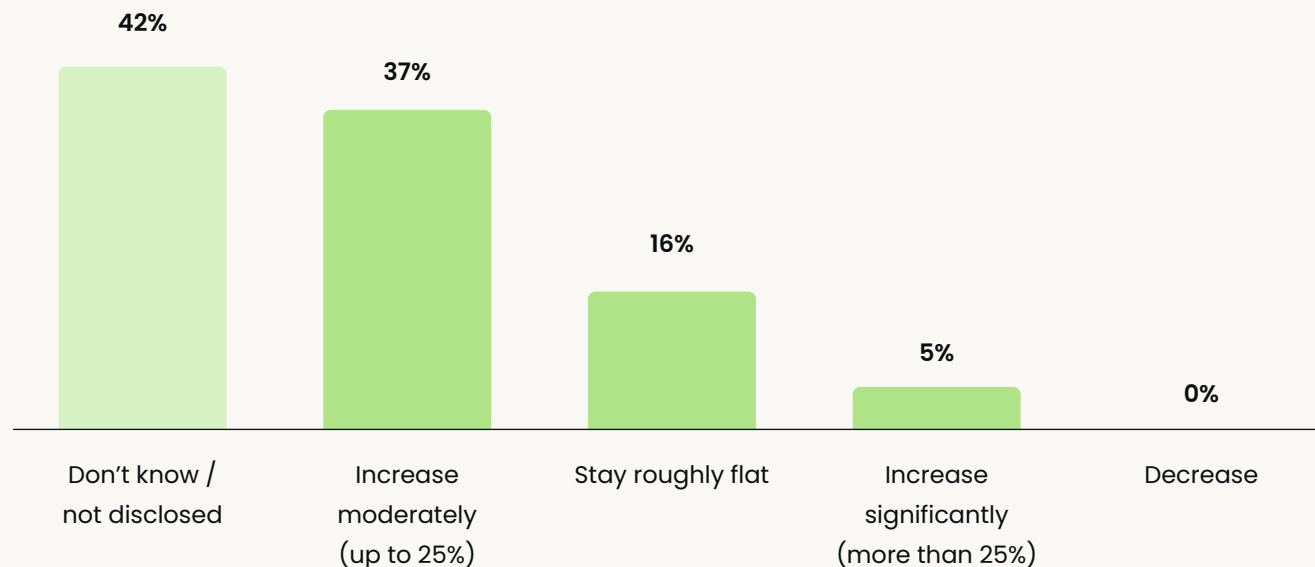
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Where teams are investing next

Spending intent confirms that no one is retreating, but also that the ownership vacuum has a budget shadow:



Not one leader plans to cut AI spend — a clear signal that whatever the disappointments of the impact gap, no one has concluded that AI is a dead end.

The commitment is real, and the direction is upward. But the largest single group doesn't know what will happen to their AI budget, and that is itself one of the more revealing findings in the survey. You cannot forecast spend on something no one owns.

The 42% “don't know” is the ownership vacuum from Chapter 4 showing up on the P&L: without a person who owns AI strategy for the revenue org, there is no one to hold the budget, plan the investment, or answer the question. The uncertainty is absence.

Governance, the biggest barriers, and the year ahead

Read alongside the barriers, the investment picture points to an obvious conclusion that most teams aren't acting on. The money is coming; the top barriers are data and skills, and budget is nobody's main concern — which means the highest-return use of the next twelve months of AI spend is not more tools. It's the context layer and the GTM engineer.

Teams that direct their increasing budget at the two things they themselves identified as the binding constraints will convert spend into impact. Teams that spend it on another point solution will add one more silo to the pile and wonder, a year from now, why they're still in the productivity-only majority.

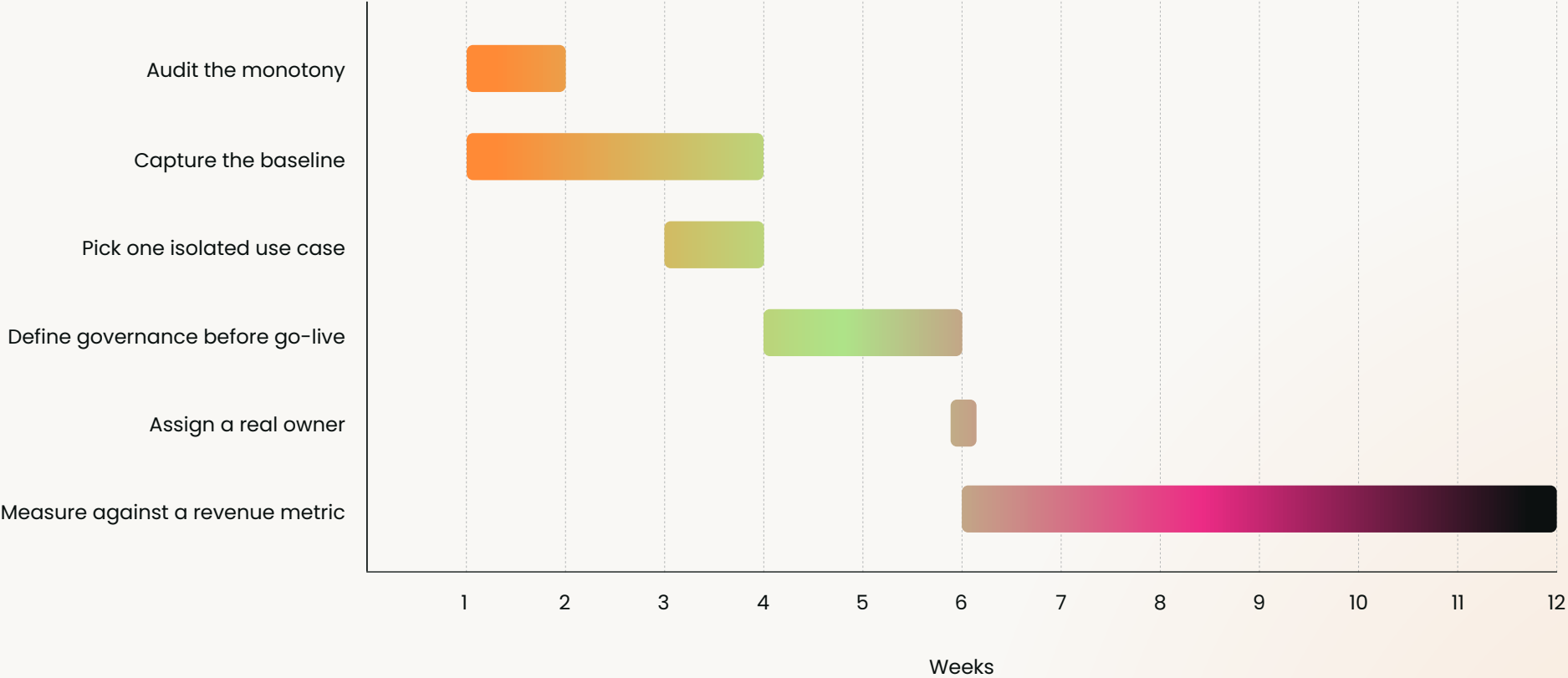
There's a coherence to who is spending, too: spend intent tracks confidence. The leaders increasing their AI budget are overwhelmingly the confident ones — almost none of the doubtful are opening their wallets wider — while the uncertainty concentrates among those who don't yet know what their budget will do. And critically, no one is cutting.

The pattern is the confident leaning in and the unsure standing still. That is a healthier signal than the impact gap alone would suggest — the money is flowing toward conviction — but it also means the teams most likely to widen their lead are the ones that already have the ownership and the proof to be confident in the first place. Advantage compounds here, as it does everywhere in this report.

The 90-day starter plan

The gap between diagnosis and action is where most AI programs stall, so the summit stages kept returning to the same question: what do you actually do on Monday?

Synthesized from sessions at CRO Summit Silicon Valley and Amsterdam 2026, here are six moves for a leader starting or restarting an AI program without blowing a quarter. The sequence is deliberate: it builds trust before stakes, and proof before scale.



**WEEKS 1–2****Audit the monotony**

Ask every revenue leader on your team: what is the most boring, repetitive thing you and your people do every week? That list is your use-case backlog, and it's already pre-ranked by trust-building potential — the most tedious, lowest-judgment tasks are exactly where AI wins early and safely.

**WEEKS 1–4****Capture the baseline**

Before deploying anything, record the current numbers for whatever you intend to move — hours on prep, pipeline per rep, cycle time, win rate. This is the single most-skipped step and the reason so many teams can't prove impact later. No baseline, no proof.

**WEEKS 3–4****Pick one isolated use case**

Internal, contained, and never customer-facing without a human in the loop. High feasibility beats high drama in round one. You are trying to earn a win you can point to, not to impress anyone with ambition.

**WEEKS 4–6****Define governance before go-live**

What data can the system see, and what can it not? Who has access? What requires human review? One page is enough to start — the goal is a clear boundary, not a policy binder.

**WEEK 6****Assign a real owner**

The revenue leader owns deployment and use-case selection; governance sits with security and compliance; and a named operator — ideally your first GTM engineer — monitors, trains, and QA the system day-to-day. If no one owns it, refer to Chapter 4 and fix that before going further.

**WEEKS 6–12****Measure against a revenue metric**

Report in the language of Chapter 2 — capacity, velocity, win rate, forecast accuracy — against the baseline you captured in step two. Then, and only then, pick use case number two. The compounding starts once you can prove the first one worked.

Governance, the biggest barriers, and the year ahead

The philosophy behind the sequence is captured in a single instruction from Duane Dufault:



"Go back to your revenue leaders and ask, What is the most monotonous, boring thing you do? Then do that with AI and give them back their time — because then you can build trust. You have to go the unsexy route first."

– Duane Dufault, Chief Revenue Officer at Time Doctor,
CRO Summit Silicon Valley 2026

The unsexy route is the fast route. Teams that chase the impressive, high-stakes use case first tend to produce a pilot that spooks the org and dies in the graveyard.

Teams that automate the boring thing first earn trust, build a track record, and buy the credibility to attempt the ambitious thing next. Start where it's safe, prove it in revenue terms, and let the wins compound.

Conclusion

The 2026 *revenue leader's mandate*

Every chapter of this report points to the same conclusion. The gap between AI's promise and AI's P&L impact – just one in twenty showing real revenue impact, nearly two-thirds confident it's coming – is not a technology gap.

The tools work. The models are capable. What's missing is the operating model wrapped around them, and operating models are not bought. They're chosen, built, and owned.

The revenue leaders pulling ahead in 2026 have made five commitments, and each one is a decision available to any leader reading this, starting this quarter.

1. **Own AI personally; don't delegate the learning curve.**

Buy the MacBook. Build the first agent. Break things on your own time before you spend anyone else's. The ownerless teams are the stuck teams, and no external function can make the judgment that only a person carrying the number can make.

2. **Measure in revenue terms, not hours.**

Productivity, velocity, win rate, consistency, and forecast accuracy. Pick the outcome first and reverse-engineer the use case from it. Hours saved are the raw material, not the product — and a board pays for the product.

3. **Connect the data before adding intelligence.**

AI on top of silos amplifies chaos. Build the system of context that humans and agents both work from. It is the prerequisite, not the upgrade, and it is the barrier your own peers named most.

4. **Redesign the team around leverage, not headcount.**

Challenge every open requisition. Hire full-stack sellers and the GTM engineers who build the agents they run on. Raise the revenue-per-rep expectation — while keeping an honest answer to where your next senior seller comes from, because the apprenticeship you automate away is the pipeline you'll miss in three years.

5. **Double down on the human skills that win deals.**

Automate everything below the trust boundary so your people can master everything above it: trust, judgment, and connection. Then keep moving the boundary outward as the evidence warrants it.

Conclusion

The window for “we’re still figuring out our AI strategy” has closed. Boards have stopped accepting it, and peers have stopped waiting.

The window for building a strategy that shows up in the numbers is wide open for roughly the next twelve months, while most of the field is still reporting adoption rates instead of outcomes, still stranded in the productivity-only majority, still waiting for the ownership question to answer itself. It won’t.

The receipts go to whoever, this quarter, decides to stop admiring the technology and start running the operating model.

If this report has got you thinking about your AI use, the Chief Revenue Officer Summit is where you need to be.

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Source sessions: Quotes in this report are drawn from practitioner sessions at CRO Summit New York, Amsterdam, Boston, and Silicon Valley 2026, and RevOps Summit New York, Silicon Valley, and Austin 2026, and RevOps Summit London 2025.



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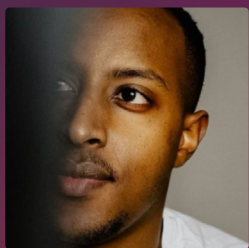



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Ivan produces content across the Alliance's communities. He's the person behind this report so if there's something you'd like to see changed or covered next, get in touch. Ivan is always glad to hear what the community wants more of.

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Rich is the founder of Revenue Operations Alliance. He's responsible for what happens next with the community, so if you'd like to have your say, don't hesitate to get in touch – Rich is always open to invaluable feedback and ideas.

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Ivana is our talented Artworker who specializes in fulfilling all our design needs. She's in charge of creating the layout and incorporating visual elements in this report and is always eager to hear your thoughts on her designs!

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