

LeanData



THE 2026 STATE OF AI GO-TO-MARKET READINESS REPORT

FINDINGS FROM 157 REVENUE LEADERS ON THE GAP BETWEEN
AI AMBITION AND OPERATIONAL READINESS

THE AI RECKONING NOBODY ANTICIPATED

For the last two years, the AI mandate in B2B go-to-market was simple: Move fast, try everything, and worry about the cleanup later.

That era is rapidly coming to an end. Teams that raced to deploy agents are now running them through AI councils, security reviews, and an even harder question: *where's the actual impact?*

To better understand how that shift is impacting the people who run go-to-market operations every day, LeanData surveyed 157 practitioners across revenue, marketing, and sales operations.

The results describe a striking gap.

Nearly every team has put AI agents into production. Almost none believe their infrastructure is truly ready to support them.

HERE'S WHAT THAT GAP LOOKS LIKE:

- » Teams deploy agents from five or more different sources, and a third cannot say how many agents touch their records
- » Data hygiene is actively degrading execution for most respondents
- » Business processes still live in people's heads, not in documented systems
- » Agents act on records with no audit trail and no shared view of the customer

When AI underperforms in go-to-market, it is rarely the model's fault. It's a data, business process, and customer context problem.

This report examines what revenue leaders revealed about their AI maturity, where execution breaks down, what they fear most, and what they want to build instead.

KEY TAKEAWAY



have deployed at least one AI agent, but only 31% say their GTM infrastructure is fully ready for AI

Source: LeanData AI GTM Customer Survey, May 2026



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KEY FINDINGS

» GTM LEADERS ARE DEEP IN AI, BUT GOVERNANCE IS BROKEN

79% are scaling or deploying agents, yet 70% have data quality degrading GTM execution, and 30% have agents with no audit trails.

» DATA QUALITY IS THE UNIVERSAL BLOCKER

55% cite data quality as AI challenge number one. 94% say GTM infrastructure isn't fully ready.

» PRACTITIONERS WANT CONTROL, NOT MORE AGENTS

The top desired outcome: 31% want a complete audit trail of every action taken on every record across all systems. Top fear: 60% are concerned about agents acting on the wrong records.

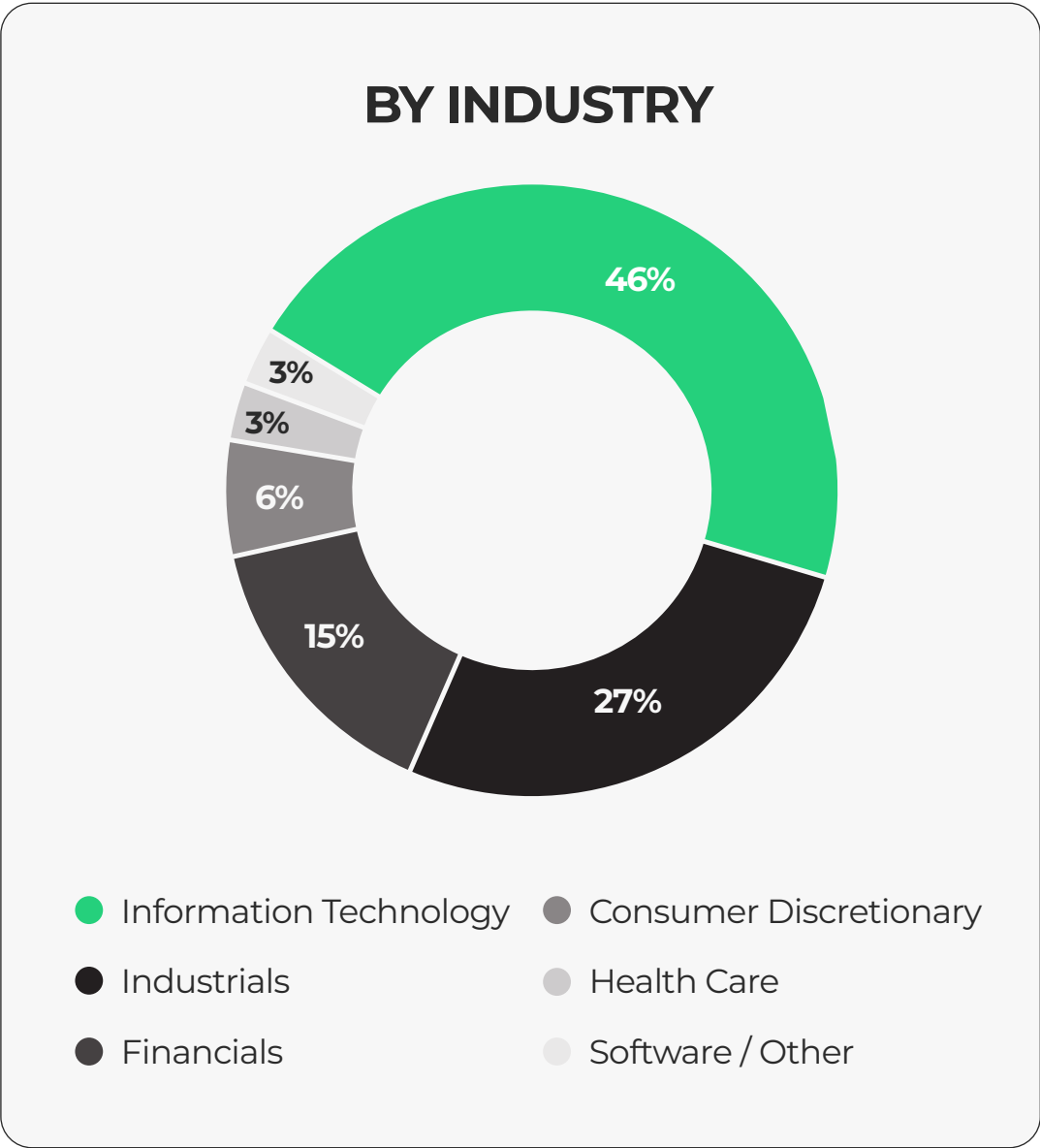
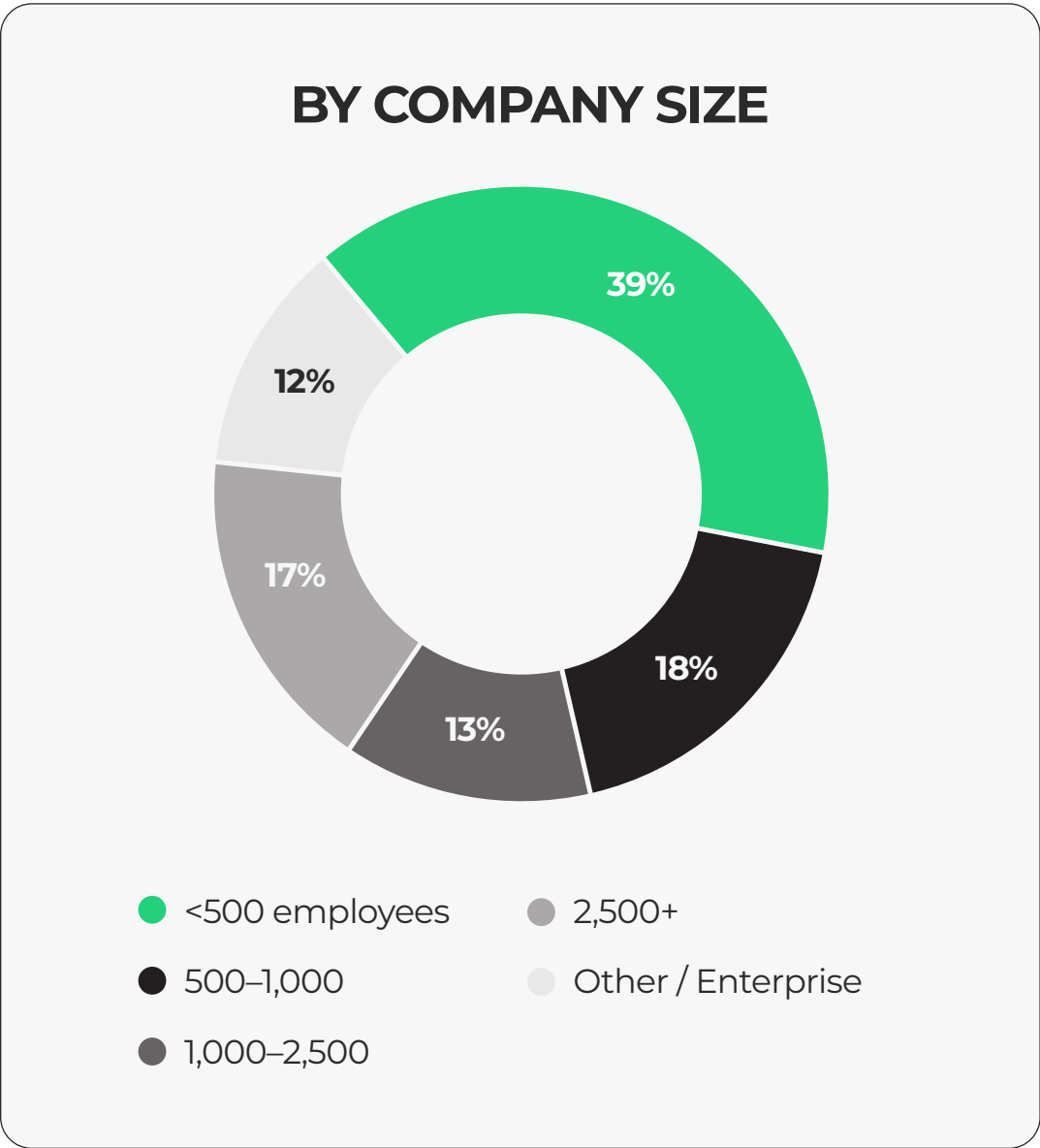
» WHEN AI STALLS, THE MODEL IS RARELY THE REASON

45% blame bad data, 37% undocumented processes, and 32% siloed teams. These top three root causes point to orchestration and infrastructure, not AI capability.

KEY FINDINGS (CONT.)

A LOOK AT THE SURVEY PARTICIPANTS

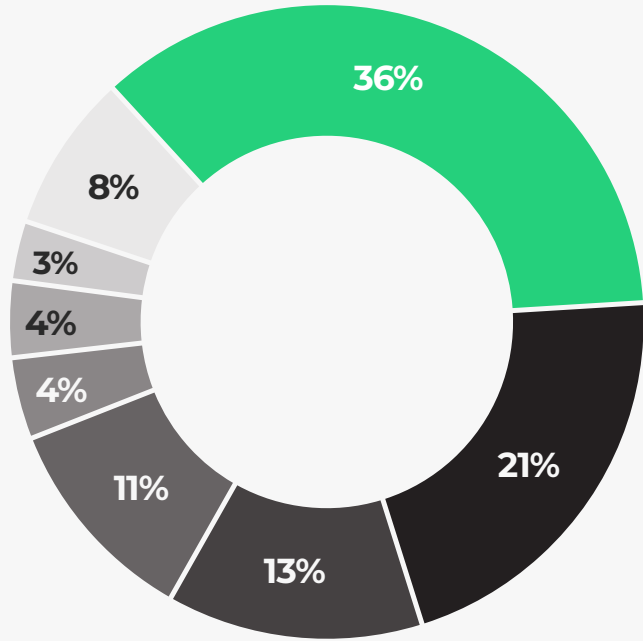
Survey participants consist of 157 B2B GTM practitioners across a range of operations roles and seniority levels. The majority work in revenue operations and marketing operations, with the rest spread across sales, marketing, IT, and sales operations.



Source: LeanData AI GTM Customer Survey, May 2026

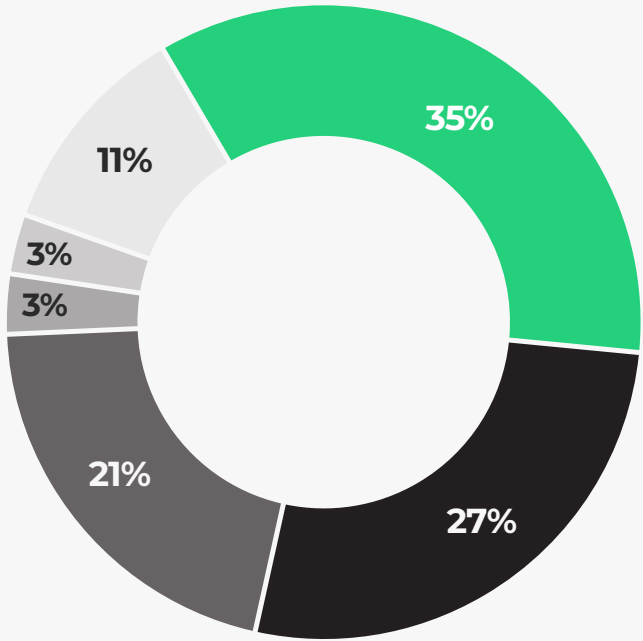
KEY FINDINGS (CONT.)

BY FUNCTION



- Revenue Operations
- Marketing Operations
- Sales
- Marketing
- IT / Information Technology
- Sales Operations
- Engineering / Other
- Other / Unspecified

BY SENIORITY



- IC / Specialist / Associate
- Manager
- Director
- VP
- C-Level
- Other / Unspecified

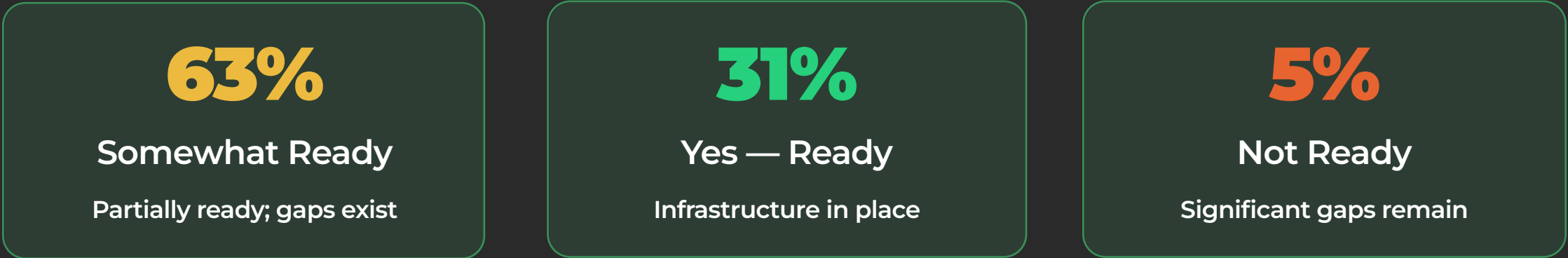
Source: LeanData AI GTM Customer Survey, May 2026

THE AMBITION-READINESS GAP

Most GTM teams are further along with AI than you might expect. When asked about AI maturity, 79% said they are already scaling agents across go-to-market or actively deploying their first use cases. Only 8% called themselves fully optimized. The rest sit in the messy middle, live in production but still figuring out the rules.

Confidence in the foundation tells a different story.

GTM INFRASTRUCTURE READINESS



Source: LeanData AI GTM Customer Survey, May 2026

WHAT NEEDS TO CHANGE TO BECOME AI-READY?

The answers clustered around four themes:

- 1. Data quality and hygiene
- 2. Governance and process documentation
- 3. System integration and standardization
- 4. Clearer ownership across functions

One respondent stated, “Our data needs to improve before we can automate, specifically around enrichment and hierarchy structure.”

“AI is going to amplify what you have there, whether it’s good or bad.”



Jessi White
Head of Web & Marketing Operations, Korn Ferry

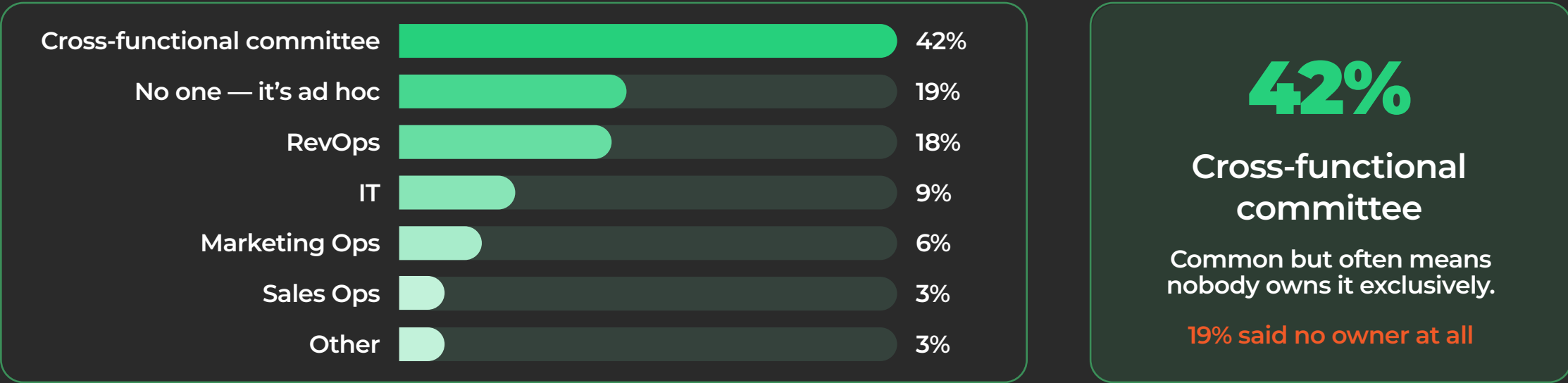


WHO OWNS AI FOR GTM?

Someone has to be accountable for AI in go-to-market. According to the survey, that someone is often no one.

When asked who owns AI strategy for their GTM organization, 42% pointed to a cross-functional committee. Another 19% admitted no one owns it at all. The remainder split across RevOps (18%), IT (9%), Marketing Ops (6%), and Sales Ops (3%).

WHO OWNS AI STRATEGY FOR GTM?



Source: LeanData AI GTM Customer Survey, May 2026

A committee sounds like coverage, but in practice, shared ownership can mean nobody holds the pen. When AI touches data, process, and revenue all at once, diffuse accountability becomes its own risk.

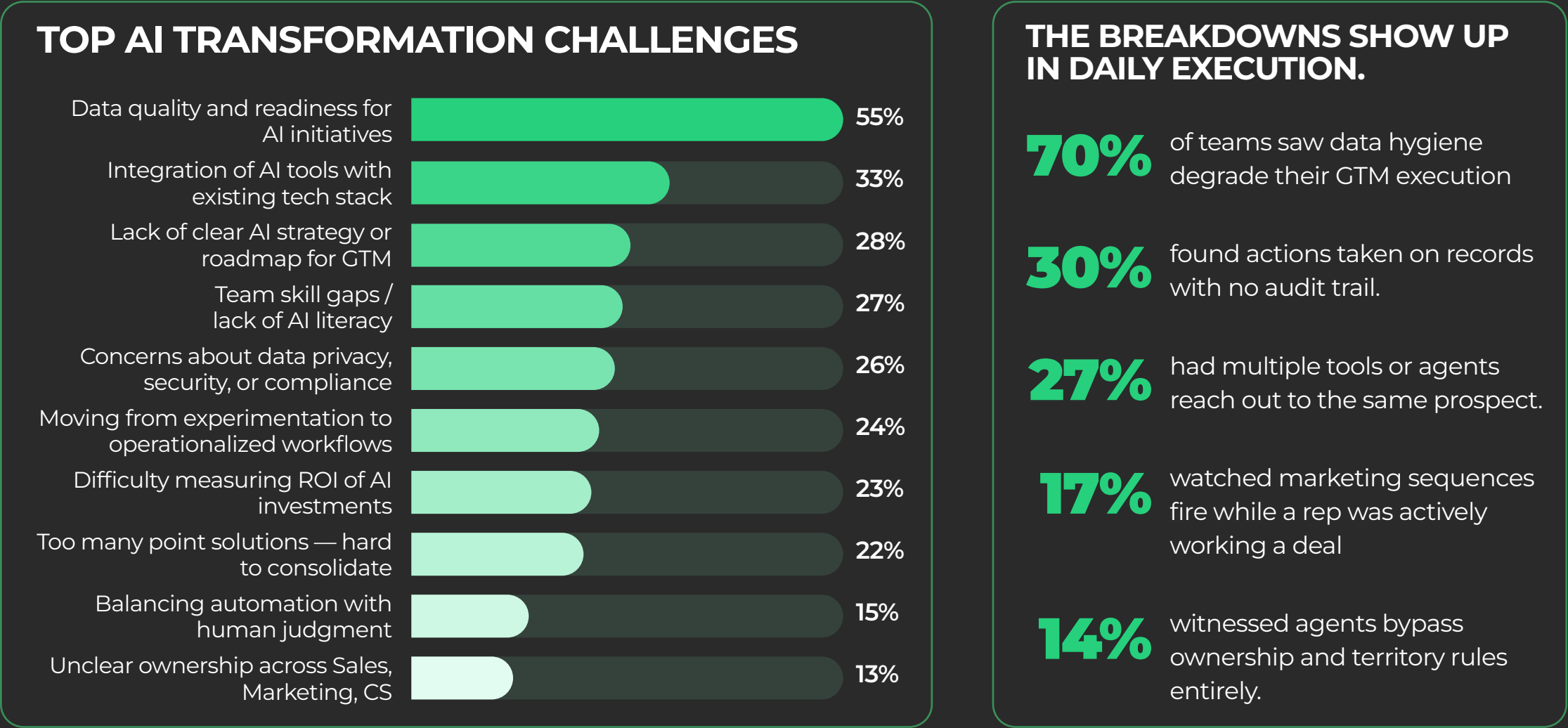
Brooke Bartos, Senior Director of Marketing Operations at Checkmarx, shared, “I think gone are the days of ‘bring your own tech stack.’ The wild, wild West days have passed.” Her organization now runs a data governance council with a rigorous review process.

Jessi White, Head of Web and Marketing Operations at Korn Ferry, described a similar structure: “We have an AI working group,” staffed by IT, security, and privacy, that evaluates every new AI use case before it goes live.

The ownership question is not going away. As agents multiply, someone has to connect the work.

WHAT'S ACTUALLY BREAKING

Ask GTM teams what stands between them and AI, and one answer towers over the rest: 55% named data quality and readiness as their top transformation challenge. Tool integration, unclear strategy, and skill gaps followed. Look closely, and those three are symptoms of the first.



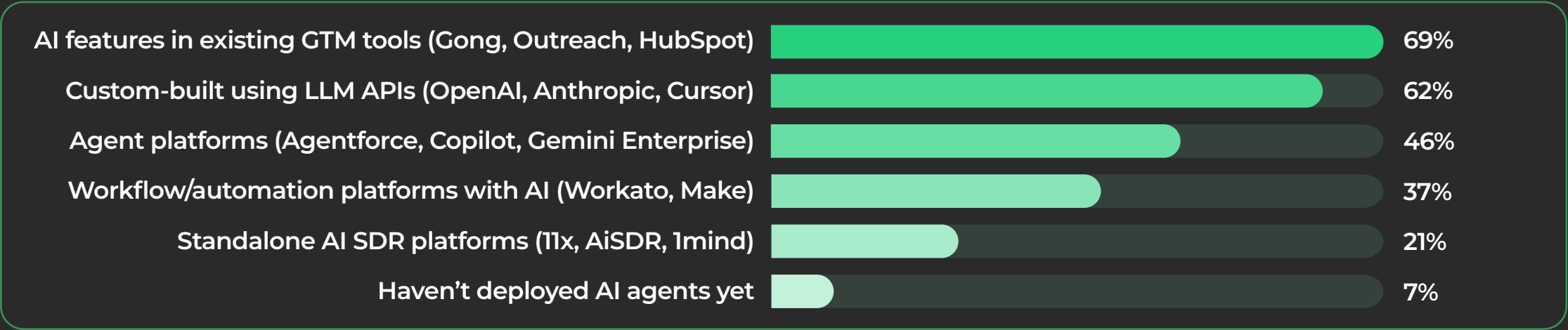
Source: LeanData AI GTM Customer Survey, May 2026

When AI initiatives stall, the root causes repeat: inconsistent CRM data, undocumented processes that live in people’s heads, and siloed teams. These are coordination failures, not capability failures.

HOW FAR ADOPTION HAS GONE

Agents are everywhere across go-to-market. Ninety-three percent of teams have deployed at least one AI agent. They source them from all directions: AI features baked into existing tools like Gong and Outreach, custom builds on LLM APIs, agent platforms like Agentforce and Copilot, workflow automation tools, and standalone AI SDR products.

WHERE AI AGENTS ARE BEING SOURCED



Source: LeanData AI GTM Customer Survey, May 2026

Agents now touch the entire revenue lifecycle. Teams have deployed them for data enrichment, outbound prospecting, inbound qualification and routing, reporting, scheduling, forecasting, renewals, territory management, and case routing.

THE COORDINATION MATH

The most common answer to “how many agents take actions on your records” was three to four. Nearly one in three respondents could not say how many agents were acting at all. Even a handful of agents, each optimizing on its own, creates a growing number of ways their actions collide.

Brooke Bartos of Checkmarx suggests treating an AI SDR like a member of the team: “We’ve talked about giving our AI SDR a similar KPI set to what our human SDRs have.”

The ambition is right. What agents need is the coordination layer that lets them work together.

“We try to really figure out: okay, what is one small problem that we think that AI can help solve for us? And then we’ll build that out.”

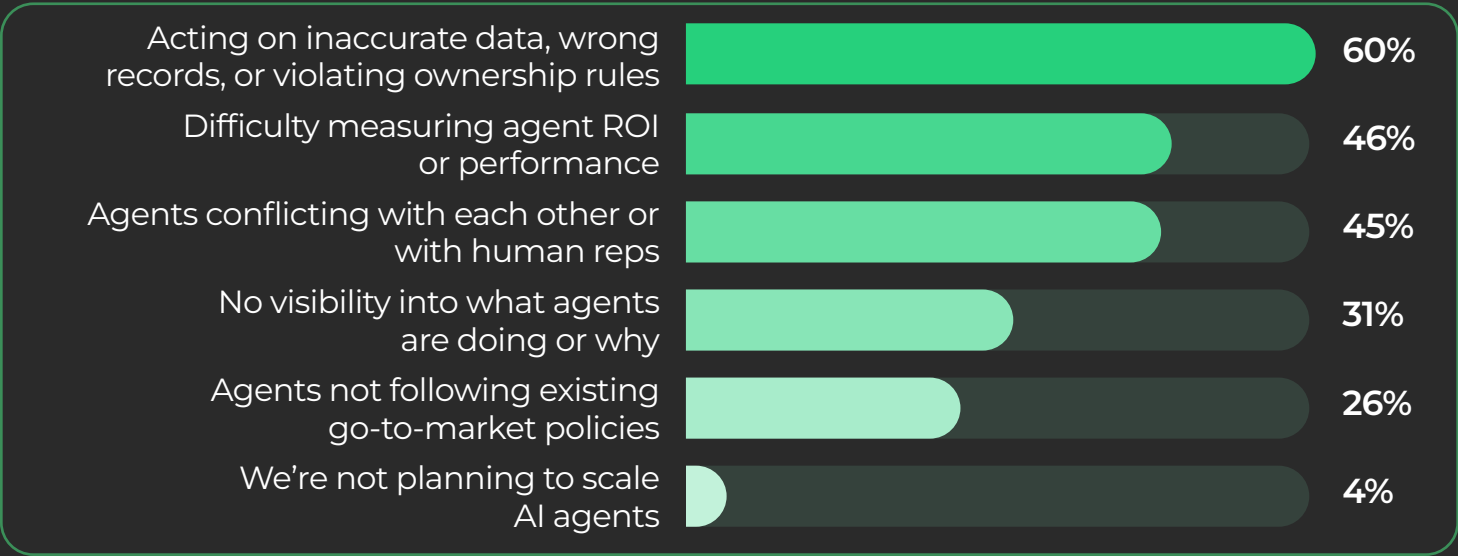
Linzy Cote
Revenue Operations Manager
Trilant



WHAT GTM TEAMS FEAR, AND WHAT THEY REALLY WANT

For all the enthusiasm around AI, the survey reveals a cautious undertone. The biggest fear is not that agents will underperform. It's that they will act on the wrong things.

BIGGEST CONCERNS ABOUT SCALING AI AGENTS



60%

#1 Fear:

Agents acting on the wrong records

A control problem, not a capability problem.

Source: LeanData AI GTM Customer Survey, May 2026

When asked which outcome would matter most if a product could coordinate every GTM action, the top three answers were:

- 1. A complete audit trail of every action taken on every record across all systems (31%)
- 2. Ensuring agents follow the same rules as human teams (21%)
- 3. Measuring whether coordination improves pipeline (20%)

Speed did not top the list. Governance and visibility did.

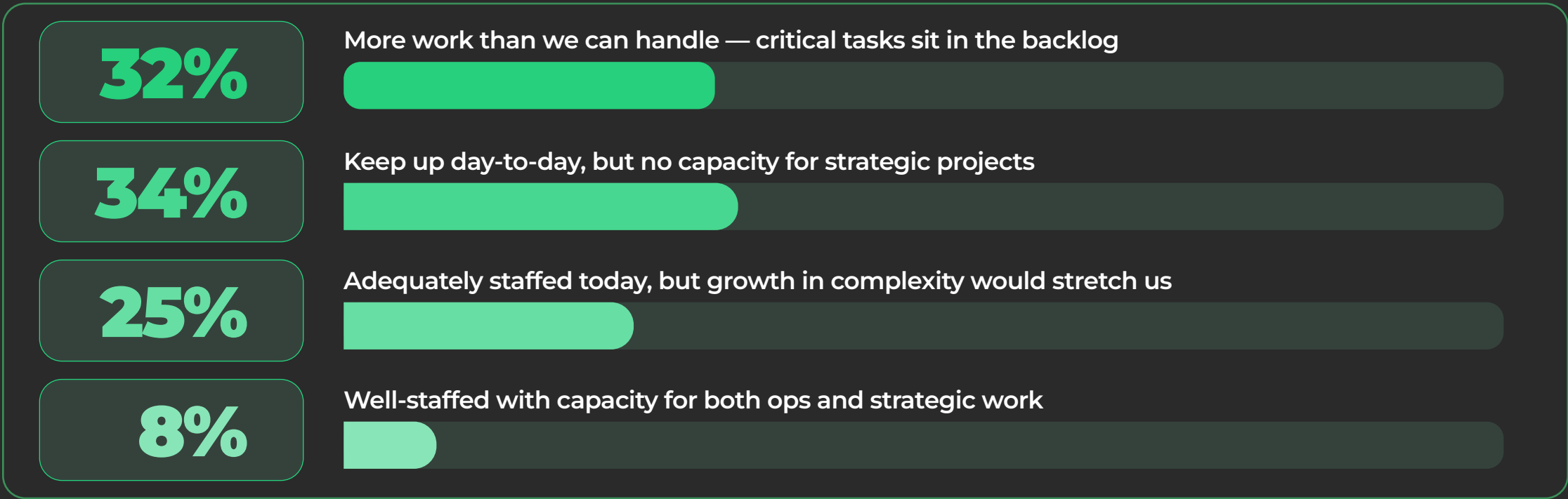
The pattern points to an industry direction taking shape: probabilistic agents need deterministic guardrails around them. Rules and reasoning will coexist, one for repeatable execution, the other for judgment in complexity.

When guardrails come first, confidence follows. Then teams are able to expand AI into more of what they do.

THE CAPACITY SQUEEZE

Here's the pressure behind every finding so far: The teams responsible for governing AI have no time to do it.

GTM OPS TEAM CAPACITY



Source: LeanData AI GTM Customer Survey, May 2026

Sixty-six percent of GTM Ops teams reported they are at or over capacity, with no bandwidth for strategic work. Only 8% said they are staffed to handle both daily operations and strategic projects. AI keeps adding complexity, and it's arriving faster than teams can absorb it.

That collision matters. GTM teams fear agents acting on the wrong records and want a complete audit trail of every action.

Neither wish survives if the answer is to hand-govern a growing population of agents one record at a time. There simply are not enough hours.

Orchestration offers a way through, by absorbing the complexity instead of adding headcount.

When capacity is the constraint, coordination is how teams beat it.



STRAIGHT FROM THE PRACTITIONERS

Numbers describe the shape of a problem, but practitioners know how it feels to live inside it. When asked how the rise of AI agents has changed their operations, respondents kept returning to the same tension: more power, more complexity, and a heavier dependence on the fundamentals.

HOW AI HAS CHANGED GTM COMPLEXITY

“AI agents have increased both the speed and complexity of GTM operations — more powerful automation, but more dependent on clean data, clear ownership, and documented processes.”

— RevOps Manager

“The hardest part was to actually introduce and let AI analyze our data because the quality wasn’t there. It’s highlighted the need for structured, consistent data even more.”

— Systems Administrator, GTM

“There are more ‘builders’ than ever. Keeping up with what others are building, documenting it, and not duplicating work can be difficult.”

— Marketing Operations

Asked what they would most want AI agents to handle, the wish list pointed at the same foundations. Respondents named AI routing capabilities, dynamic data cleanup and enrichment, and better diagnostics. One wanted the ability to ask “why did this lead route here?” and get a real answer.

Another wanted dashboarding to confirm the right leads reach the right people without duplicate assignments.

The theme underneath every answer is control. Teams want AI to strengthen the foundation, not stress it further.



FROM RECKONING TO READINESS

The AI story in go-to-market has turned a corner.

The first chapter told teams to do everything at once, move fast, experiment freely, and prove the technology could work. It did. The next chapter asks a harder question: where is the impact, and can the foundation carry the ambition?

The survey answers plainly. Vision is racing ahead of infrastructure. Teams are building something impressive on ground that has not been reinforced.

THREE THINGS ARE MISSING ACROSS MOST ORGANIZATIONS:

- 1 A data foundation they can trust
- 2 Business process that lives in the system instead of in someone's head
- 3 A shared view of the customer that every team works from

None of this signals a retreat from AI. The goal is right. The structure to reach it is what needs to catch up.

The teams that win will not be the ones running the most agents. They will be the ones whose agents operate on trusted data, encoded process, and shared context.

The bottom line runs through every finding in this report: When AI underperforms in go-to-market, it is a data and process problem.

Orchestration is the fix. Build the foundation first, and the ambition finally has something to stand on.

See what AI-ready orchestration looks like

Build the foundation your agents can trust.

REQUEST A DEMO

HOW LEANDATA SUPPORTS AI GTM ORCHESTRATION

THE PLATFORM BEHIND THE MOTION

LeanData operates as the intelligent orchestration layer between your existing systems: CRM, marketing automation, intent platforms, sales engagement tools, data warehouses, and customer success platforms. It pulls in signals, normalizes data, automates actions, and surfaces insights across the full revenue lifecycle.

The platform is built natively inside Salesforce and connects to the wider stack your teams already use every day, from Databricks and Snowflake to enrichment tools, call recordings, and CDPs.

Two ideas define how LeanData applies AI. Admin velocity accelerates the operations team, simplifying tasks, answering hard questions, and refining workflows. Intelligent execution extends AI into the go-to-market motion, pairing the judgment of probabilistic reasoning with the reliability of deterministic action.

WHAT MAKES LEANDATA DIFFERENT:



DEPTH OF GTM EXPERTISE

LeanData was built for the complexity of enterprise B2B revenue operations. The platform and the team behind it understand multi-product organizations, global territories, partner channels, and buying groups in a way general-purpose automation tools do not.



NO-CODE FLEXIBILITY

LeanData's drag-and-drop FlowBuilder lets operations teams design and update go-to-market processes without writing code or filing IT tickets. When your strategy changes, your orchestration changes with it, in hours.



ENTERPRISE-GRADE GOVERNANCE

Every routing decision, workflow action, and AI-generated output is fully auditable. Business-unit separation, automated data governance, and transparent audit logs give enterprise teams the control and visibility they need to run AI on live revenue processes.

KEY CAPABILITIES

THE TOOLS THAT POWER THE AI GTM MOTIONS



INTELLIGENT MATCHING:

LeanData's matching engine uncovers hidden relationships between CRM objects, connecting leads to accounts, contacts to opportunities, and individuals to buying groups. The engine reaches 95% accuracy, so signals reach the right destination.



ROUTING AND ASSIGNMENT:

LeanData supports the most complex assignment models in enterprise B2B: round robin, territory-based, explicit user assignment, partner routing, weighted distribution, and best-fit assignment. Automated re-routing handles time off, capacity constraints, and territory changes without manual work.



WORKFLOW AUTOMATION (FLOWBUILDER):

LeanData's no-code FlowBuilder lets operations teams design, test, and deploy go-to-market workflows visually. Conditional branching, multi-system triggers, and automated actions handle the most complex processes without a single line of code.



AI INFERENCE NODE:

The AI Inference Node embeds an LLM at any decision point in your routing graph, so agents can read messy or unstructured data and act on it during routing. It classifies inbound requests by product fit, validates company and URL data, scores leads with account context, and flags at-risk accounts through sentiment analysis.



AI ASSISTANT:

The AI Assistant is a conversational experience embedded across LeanData products. An admin can ask "why did this lead route here?" in plain language and get an answer in seconds, with no manual tracing through audit logs. The assistant reads graph and log context to help teams troubleshoot integration errors, report on volume, and find gaps in how workflows are built.



MEETING SCHEDULING (BOOKIT):

LeanData BookIt connects buyers to the right rep or expert immediately, from a web form, an email, a chatbot, or an AI SDR. BookIt handles distribution rules, time zones, and rep availability with no manual coordination. Native MCP support connects any AI SDR to BookIt's deterministic scheduling and routing.



BUYING GROUPS JOURNEYS:

LeanData Journeys identifies, tracks, and orchestrates the full buying committee. It connects individuals to opportunities, alerts sales when key roles are missing, and gives marketing the visibility to engage the entire group, not only the champion.



SLA AUTOMATION AND TRACKING:

LeanData surfaces buying signals to reps in real time and enforces response SLAs automatically, alerting managers when follow-up thresholds are missed and triggering escalation paths when needed.



NOTIFICATIONS AND COLLABORATION:

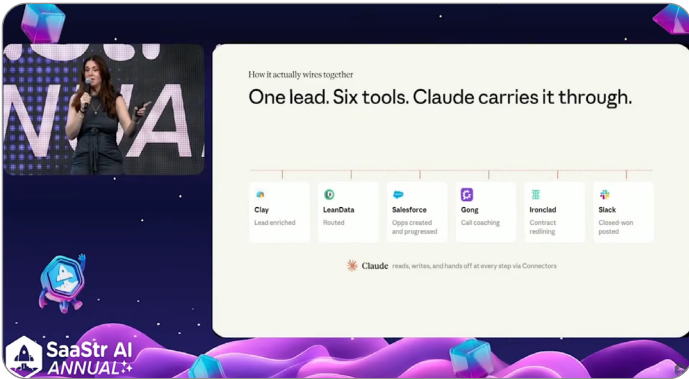
LeanData sends real-time notifications via Slack, Microsoft Teams, and email, giving reps the context they need to act immediately without logging into a separate dashboard.

RECOMMENDED RESOURCES



RESEARCH STUDY

[Harvard Business Review: Aligning Go-to-Market Execution with Strategy](#)



BLOG

[Why Leading AI Companies Run Their Go-to-Market on LeanData](#)



CUSTOMER STORY

[How Uber Bridges the AI-to-Sales Gap with Agentforce + BookIt](#)

GET STARTED TODAY

Visit [LeanData.com](#) to learn more about LeanData's Intelligent GTM Orchestration solutions for automated Scheduling, Matching, Routing, and Buying Groups, or visit us on the Salesforce [AppExchange](#).

REQUEST A DEMO



The 2026 State of AI Go-to-Market Readiness Report

Why LeanData?

LeanData is the backbone and leading platform for Intelligent GTM Orchestration. Sitting at the intersection of AI agents, human sellers, and the systems they share, LeanData helps B2B enterprises fuel efficient revenue growth by orchestrating every signal, whether human, system, or AI-driven, across the entire revenue lifecycle. Our platform turns buyer signals into coordinated action from lead acquisition through retention and expansion, making AI a first-class participant in your go-to-market strategy rather than an ungoverned black box. Built for enterprise complexity, LeanData handles any-object routing, buying group orchestration, and scheduling, with full auditability and no code required. More than 1,000 companies, including Anthropic, OpenAI, Databricks, Snowflake, and Palo Alto Networks rely on LeanData for AI GTM orchestration.