

LeanData

THE PLAYBOOK FOR AN AI-READY GTM INFRASTRUCTURE

THREE THINGS REVOPS LEADERS MUST ADDRESS BEFORE AI
CAN DELIVER REAL RESULTS



THE AI RECKONING

When AI arrived, companies pushed their go-to-market (GTM) leaders to grow fast, do more with less, and empower their teams.

So GTM teams quickly put automation to work. They experimented with copilots, research agents, new scoring models, and added AI SDRs and support agents. But many of those efforts often floundered.

Fragmented pilots often acted on inaccurate data, workflow rules, and views of the customer. The result: more AI activity, but not more business value.

Experimentation time is over. Leadership wants to see real results. Teams are putting agents through AI councils and security checks. These groups are asking tough questions, including “Where is the actual impact?”

The problem isn’t with AI itself. The real issue is that the foundation often isn’t ready to support AI at scale. That’s why the focus is moving from experimentation to readiness.

This shift directly impacts GTM strategy. Revenue operations (RevOps) and GTM leaders need to set up a strong foundation so they can use AI quickly and confidently.

This playbook explains the three elements that an AI-ready foundation requires: reliable data, business process truth, and shared customer context. It shows why each matters and how RevOps and GTM leaders can put them in place to get more value from AI-powered automation.

AI TRANSFORMATION PRESSURE

61%

of CEOs believe their boards are too impatient with the pace of AI transformation.

– [BCG’s 2026 survey](#)

FOUNDATION FIRST

“Realizing AI’s value requires foundational fixes in data governance and infrastructure.”

– [Forrester](#)



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AI AT SCALE STARTS WITH THE RIGHT FOUNDATION

AI can process more signals, handle more tasks, and make more recommendations than any human team.

But AI can't tell which data is correct. It doesn't know what lives in people's heads, like exceptions to routing rules. It can't understand context when teams have different views of the customer.

WITHOUT A SOLID FOUNDATION, FAST-MOVING AI CAN CREATE MORE OPERATIONAL PROBLEMS, LIKE:

- » Acting on incomplete, inaccurate, or duplicate data
- » Triggering conflicting outreach across marketing, sales, and customer service
- » Most importantly, creating a bad customer experience

TO BE READY FOR AI, A GTM MOTION NEEDS THREE KEY ELEMENTS:

- » A reliable data foundation
- » Business process truth
- » Shared customer context

95%

of enterprise generative AI pilots delivered no measurable P&L impact within six months, largely because organizations lacked the underlying data readiness, workflow integration, and ownership needed to scale AI beyond experimentation.

Source: MIT Project NANDA, The GenAI Divide, 2025

21%

of organizations report mature governance for agentic AI.

Source: Deloitte, 2026

94%

of GTM leaders say their infrastructure isn't fully ready for AI.

Source: LeanData, The 2026 State of AI Go-to-Market Readiness Report



THE AI TRANSFORMATION JOURNEY

WHAT'S REQUIRED FOR AI TRANSFORMATION?

TO BE READY FOR AI, A GTM MOTION NEEDS THREE KEY ELEMENTS:

PILLAR 1



DATA FOUNDATION

Clean, resolved, continuously governed GTM data that agents - and people - can trust

PILLAR 2



BUSINESS PROCESS TRUTH

Documented, encoded business rules so agents know what to do and when

PILLAR 3



SHARED CUSTOMER CONTEXT

Marketing, Sales, and CS operating from one shared source of customer truth

PILLAR 1

DATA FOUNDATION GIVES AI SOMETHING IT CAN TRUST

A data foundation gives AI clean, complete, and connected GTM information that stays current.

Agents need reliable inputs to identify the right people and accounts, interpret signals, and take action.

A STRONG DATA FOUNDATION SHOULD CONSISTENTLY ANSWER BASIC QUESTIONS, LIKE:

- What do we know about this person?
- Which account do they belong to?
- Who else is on the buying committee?
- What signals have we received?
- Which record is the source of truth?
- How do records relate to one another?

Through 2026, organizations will abandon 60% of AI projects that aren't supported by AI-ready data.
– Gartner

AT SCALE, BAD DATA CREATES BAD OUTCOMES

AI SCALES DATA PROBLEMS:

- » Duplicate records
- » Incomplete account data
- » Incorrect ownership



CREATING LARGE OPERATIONAL CONSEQUENCES:

- » Multiple outreach to the same person
- » Inaccurate prospecting messages
- » Contacts and opportunities routed to the wrong rep go cold

PILLAR 1

DATA FOUNDATION GIVES AI SOMETHING IT CAN TRUST (CONT.)

Imagine a company uses AI SDRs across thousands of accounts. But its data doesn't reliably distinguish between active opportunities, current customers, strategic accounts, and accounts being actively worked. So, GTM automation sends messages that aren't relevant. It misroutes opportunities. It also buries high-potential contacts in low-value tasks. Company reputation gets damaged. The GTM organization increases its efficiency, but not its effectiveness.

Consistently clean, complete, connected data helps AI focus work where it can have the most impact. That can improve pipeline generation by helping teams identify and act on the right buying signals. It can also improve operational efficiency by reducing manual cleanup, misrouted work, and other costly data-driven errors.

For RevOps, data quality determines whether AI boosts productivity or speeds up bad choices.



WHAT SHOULD REVOPS DO?

Build and maintain the data foundation.

- 1 Connect the data sources.**
Bring together CRM, marketing, intent, data warehouse, and other signal sources so agents can work from a consistent set of information.
- 2 Establish reliable relationships.**
Match people, accounts, and buying-group relationships correctly and define the source of truth for each data type.
- 3 Keep data clean.**
Continuously monitor and improve data quality rather than treating cleanup as an occasional project.
- 4 Keep AI current.**
Make sure agents are trained or prompted with relevant data and updates so they can account for changes as they occur.

BUSINESS PROCESS TRUTH GIVES AI RULES IT CAN FOLLOW

Business process truth gives AI clear, documented rules for how your GTM motion works.

Just as a new hire needs to know how to do their job effectively - what tasks to do and when, who to partner with, role objectives - an AI agent needs clear rules for executing a business process.

DEPENDING ON YOUR GTM PROCESS, YOUR AGENT MAY NEED TO KNOW:	
» Who and what to act on	Which accounts, leads, contacts, opportunities, or customers qualify for action
» What information to use	Account data, engagement signals, enrichment, customer health, opportunity stage
» What rules to follow	Assignment criteria, service level agreements, engagement rules, approval requirements
» What to do next	Personalize outreach, assign an owner, trigger a handoff, escalate, or wait
» When to stop or hand off	When a human needs to approve an action or another team or agent takes over
» How to handle exceptions	Different treatment for strategic accounts, existing customers, partners, or other special cases

AT SCALE, UNDOCUMENTED RULES BECOME INCONSISTENT ACTION



PILLAR 2

BUSINESS PROCESS TRUTH GIVES AI RULES IT CAN FOLLOW (CONT.)

For example, a potential customer asks for a demo, but the account churned seven months ago. Your business process requires returning customers to enter a different sales motion, with different qualification, routing, and follow-up rules. Without clearly defined and codified criteria, the AI agent may send the lead down the wrong path. With those rules in place, the agent knows how to handle the opportunity differently from a brand-new prospect, including where to route it and what should happen next.

Clear business rules give AI a framework for consistent action. Codified business logic bridges the gap between probabilistic AI insights and deterministic execution. It also makes automation easier to trace and improve. When an agent takes an action, teams can see which rules and inputs drove the decision and adjust the process as needed.



WHAT SHOULD REVOPS DO?

Document and formalize rules and workflows.

- 1 Map the customer journey.**
Document in detail the end-to-end customer journey, from first touch through post sales, expansion, and upsell.
- 2 Codify critical business logic.**
Document the critical enrichment, assignment, engagement, routing, handoff, and escalation logic.
- 3 Standardize exceptions.**
Define how exceptions should be handled across the customer journey.
- 4 Make rules traceable.**
Ensure rules are easy to review and audit so teams can see why AI made the decision.

Why AI Needs Guardrails

AI is probabilistic, meaning it uses patterns and probabilities to make decisions. In contrast, a deterministic approach has clear, fixed rules that ensure consistent outcomes. Together, they allow you to operate agents at full speed and trust their output.

PILLAR 3

SHARED CUSTOMER CONTEXT GIVES AI THE FULL PICTURE

Shared customer context gives AI a full view of what's happened with an account, what's changed, and how those changes affect next steps.

Customer relationships are constantly evolving. A new stakeholder may join the buying group. An expansion opportunity may emerge. An account's priorities may shift. Agents need the latest context to recognize those changes and stay aligned with the GTM team. Shared, up-to-date context enables automation to make the right call.

ONE CUSTOMER. ONE CONTEXT.

Marketing, sales, and customer service connect with the same account. Yet, each team knows a different part of the story.

Without shared context:

Different teams
+ Different views
= Conflicting actions

With shared context:

Shared information
+ Shared understanding
= Orchestrated action at scale

AT SCALE, MISSING CONTEXT BECOMES MISALIGNED ACTION

WHAT CHANGED:

- » Account history
- » Customer relationships
- » Customer champion departs
- » New buying group member
- » Expansion opportunity



AGENTS ACT WITHOUT THE FULL PICTURE:

- » Churn risk missed
- » Outreach misaligned
- » Account context overlooked

PILLAR 3

SHARED CUSTOMER CONTEXT GIVES AI THE FULL PICTURE (CONT.)

Say an AI agent spots an upsell opportunity and sends an expansion message to a customer. But it doesn't know that the customer is currently implementing. Their health score is falling, and they have three open support tickets. The GTM team prohibits commercial outreach during implementation. However, no one added this rule to the system. Automation happened according to instructions, but it lacked the business context needed to make the right decision.

Shared customer context creates the foundation for Intelligent GTM Orchestration. By bringing historical, current, and future account insights together, teams can coordinate signals, decisions, and actions across the customer lifecycle. People and AI can work from the same context, helping teams deliver a more consistent customer experience.



WHAT SHOULD REVOPS DO?

Build shared context and define how changes should affect actions.

- 1 Define the triggers that tie changes to action.**
Map the “if this, then that” logic across the customer journey so agents know which changes should trigger a different action, status, owner, or next step.
- 2 Connect signals across the customer lifecycle.**
Rationalize data across MAP and CRM, connect pre- and post opportunity account details, and integrate signals from across the customer journey.
- 3 Give GTM teams and agents a shared view of accounts.**
Ensure that marketing, sales, and customer service can all see the same account details, whether in CRM or elsewhere.
- 4 Coordinate agentic and human activities.**
Make sure agents account for what other agents and the rest of the GTM team are doing, avoiding conflicting messages, duplicate work, or actions that work at cross purposes.

THE THREE PILLARS WORK TOGETHER AS A SYSTEM

Data tells AI what it should work on. Process tells it when to start, what steps to take, and when to stop. Context gives AI the bigger picture so its actions align with the GTM motion and team.

LEAVE OUT ANY OF THESE, AND ORGANIZATIONS ARE AUTOMATING THE MESS FASTER:

- » Incomplete data can send AI in the wrong direction.
- » Unclear processes can lead to inconsistent actions.
- » Missing context can put AI at odds with the GTM team.

Organizations need all three to move fast and with confidence.



DATA FOUNDATION

WHAT IS TRUE?

Clean, connected, complete information that stays up to date. The ground truth AI uses to understand people, accounts, and signals.



BUSINESS PROCESS TRUTH

WHAT SHOULD HAPPEN?

Clear rules and guardrails that guide actions. The logic AI uses to make consistent decisions, take the right steps, and handle exceptions.



SHARED CUSTOMER CONTEXT

WHAT ELSE SHOULD AI CONSIDER?

The broader account, customer, and business context. AI needs to understand what has changed and how that affects what it should do.

WHERE DO YOU STAND?

Answer these questions to see if your GTM foundation is ready for AI. The goal is to find and fix weaknesses before scaling automation so your GTM performance doesn't suffer.

A QUICK AI-READINESS CHECK:



CONCLUSION: BUILD THE FOUNDATION TO SCALE AI WITH SPEED AND CONFIDENCE

AI can help GTM teams move faster. But speed only matters if your organization trusts AI to make good decisions and take the right actions. The organizations that succeed will run AI on a trusted foundation:

-  **Reliable data**
-  **Clear business processes**
-  **Shared customer context**

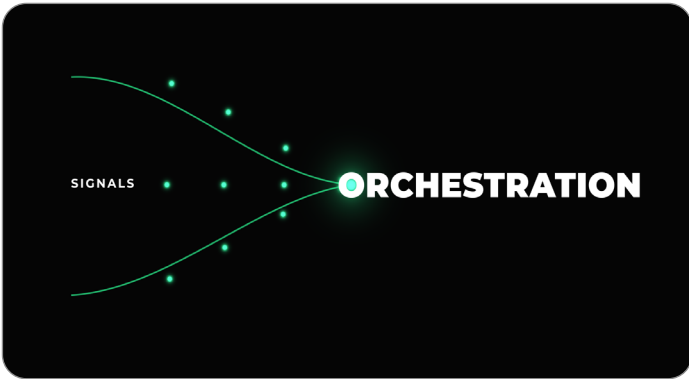
With this foundation in place, RevOps can go from testing AI to scaling it quickly and confidently.

RECOMMENDED RESOURCES



EBOOK

[The 2026 State of AI Go-to-Market Readiness Report](#)



VIDEO

[LeanData, the Foundation for AI-Powered Go-to-Market](#)



CUSTOMER STORY

[How Uber Increased Deal Velocity by 68% with LeanData](#)

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

About LeanData

LeanData provides the backbone for AI-ready go-to-market infrastructure. More than 1,000 leading B2B companies and a community of 5,000-plus OpsStars rely on LeanData to fuel efficient growth by aligning marketing, sales and customer service execution with the entire AI-enabled customer journey. LeanData’s Intelligent GTM Orchestration platform acts as the connective tissue across the revenue lifecycle, integrating and normalizing buyer data, automating signal-driven workflows and delivering AI-powered insights. LeanData is a 2027 Salesforce Partner of the Year Award Winner for Customer Value and a #1 G2 Crowd Provider.

