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Where AI drives value for revenue teams

A state-of-the-industry report from Talbot West

Talbot West configures AI capabilities inside corporate revenue teams. This report draws from our observations and synthesizes those with other market research.

Revenue teams often reap the largest gains from proprietary data and logic configured around commodity AI models.

Teams realize market-leading efficiencies when they wrap generic AI models with their own definitions, sales logic, data, and goals. This custom-configuration approach tends to drive higher ROI than the proliferation of point solutions.

01

Source and target

With roughly 95% of a market not in-market at any moment (Ehrenberg-Bass Institute; LinkedIn B2B Institute), outbound returns depend on accurate targeting much more than a spray-and-pray approach. A scoring harness that ranks a target list against a custom rubric produces outsize gains. A bare fit model returns the firmographic lookalikes every competitor already works.

Contact data is the rare lever worth buying rather than building. Several enrichment sources queried in sequence reach markedly higher contact accuracy than any single provider. The gain comes from the query sequence a team designs, not the data every competitor can buy.

Inbound routing repays automation but earns no edge. Rule-based assignment cuts misroutes and speeds first contact, but the rules are generic, so any tool matches a custom build.

In short: sharper sourcing and targeting wins. Leading teams configure their own logic and rules into an AI system and outperform competitors that rely on more generic tooling.

02

Engage

Teams that build their positioning, proof, and past wins into their drafting tools cut a large share of production time per asset. The same material closes the quality gap between reps. Strip it out and the output turns generic: fast to produce, no better at closing.

AI-drafted variants can extend coverage to dormant accounts and segments no rep could work by hand. Whether that coverage converts depends largely on the quality of a team's own configured logic, templating, and guardrails.

Pre-call briefs raise the floor, not the ceiling: a brief before every call means no rep walks in cold, and it counts most on teams that drop prep under quota pressure.

Intent-based triage cuts handling time by a quarter to a half. Like routing, it runs on volume and fixed rules that are fairly universal.

Rather than a 1-to-1 model (a SaaS subscription per function), leading revops teams tend toward a few-to-many paradigm in which minimal infrastructure enables advanced AI capabilities across many workflows and processes.

In-house configuration brings compounding effects, as functions leverage a common core and produce economies of scale

03

Convert

The largest category, conversation intelligence, coaches against call recordings. A system that tracks an open deal and prompts the rep's next move from the team's own methodology, not just a post-call scorecard, often lifts close rates 2 to 6 points. No off-the-shelf product can field the logic customization necessary for this type of lift; it is highly conditional on the team's unique positioning, competitive landscape, mandates, and many other variables.

A cluster of levers strips out admin without touching judgment. Auto-maintained battlecards stay current across the two-thirds of deals that are competitive, where reps otherwise rate their own prep as weak. Answers drawn from a vetted RFP library return in a fraction of the time. Auto-logging often returns hours per rep each week. These tasks are structured and repetitive, so the gains transfer to almost any team.

Forecast accuracy comes from the deal history behind the scoring. Informed by a team's own deals, rubrics, and logic, an AI forecast vastly outperforms a generic system.

04

Retention, expansion, and coaching

Coaching is the most starved stage in the cycle. Top teams coach several times as much as their underperforming counterparts, yet most managers underprioritize it. AI roleplay that drills reps against real buyer scenarios, graded on the team's own rubric, shortens time to competence, with the sharpest gains among new reps.

Onboarding built from a team's logic, priorities, and recorded calls often cuts new-rep ramp by a quarter to two-fifths.

After the sale, three scoring models defend and grow the base. Early-warning scoring surfaces accounts going quiet, white-space scoring finds expansion among existing customers, and churn scoring sizes the revenue at risk each renewal. All three run on a team's own account and usage data; generic health scores rarely transfer between businesses.

Specific revops functions where AI can add leverage

AI augments the following task types. In most cases, maximum value is realized with human-AI-teaming rather than pure AI automation.

LEVER	FUNCTION	EFFECT	CONDITIONAL ON
SOURCE AND TARGET			
Account scoring and targeting	Rank accounts against a fit rubric	Higher outbound hit rate	Defined rubric, product-market fit
Account research and intel	Mine data sources, assemble intelligence	Uniform research across reps	Public signals, other data sources
Buying-signal monitoring	Watch for intent signals in available data	Earlier engagement on active accounts	Signal set mapped to the team's plays
Lead routing and speed-to-lead	Match and route inbound leads	Faster first touch, fewer misroutes	Operational; tool-agnostic
Data enrichment	Fill contact and firmographic data	Markedly higher contact accuracy	Sequencing logic, not any one source
Deal sourcing	Scrub data sources, score by deal fit logic	More deals in pipe	Go / no-go rubric for deals
ENGAGE			
Collateral and content generation	Produce decks, teasers, other collateral	Shaves production time 40% - 80%	Brand guidelines encoded
Segment and variant messaging	Generate message variants by segment	Coverage of dormant and white-space pools	Team's segmentation and language
Pre-meeting research briefs	Prep reps on the company and stakeholder mapped to value propositions	Consistent preparation across reps	Defined sales logic
Market research and synthesis	Filter, capture, generate reports and research for target accounts	Catch current developments, generate collateral	Market thesis, awareness of account interests
Inbound filtering and triage	Sort and route inbound by intent	A quarter to a half less handling time	Operational; tool-agnostic

LEVER	FUNCTION	EFFECT	CONDITIONAL ON
CONVERT			
Encoded sales reasoning	Dynamic multidimensional analysis of live deals	2 to 6 close-rate points	Formalized logic and competitive positioning
Call analysis and coaching	Coach off call recordings, based on internal rubrics	All reps uplevel, best practices distributed	Mature; acts post-call, not live
Competitive battlecard upkeep	Maintain and enrich battlecards	Prepared for competitive deals	Team's competitive positioning
Quote and proposal generation	Draft quotes from deal data, generate proposals	Hours per proposal removed	Team's pricing logic and guardrails
RFP and questionnaire drafting	Draft documents and answers from templates	Far faster responses	Defined templates
CRM hygiene and auto-logging	Write call and deal data back	Hours returned per week	Operational, broadly consistent
Forecast and pipeline scoring	Score deals and roll up a forecast	More stable forecasts	Team's own deal definitions
RETENTION, EXPANSION, AND INTERNAL DEVELOPMENT			
Roleplay and certification	Simulate buyer scenarios for practice	Faster competence, largest for new reps	Scored on the team's own rubric
New-rep ramp	Onboard from defined rubrics and curricula	A quarter to two-fifths less ramp time	Defined learning objectives and curricula
Early warning and at-risk accounts	Flag accounts going quiet	Reactivation of dormant accounts	Team's account and usage data
White-space and expansion scoring	Score expansion opportunity	Revenue identified inside the base	Team's product and usage data
Churn and renewal risk detection	Score account health	At-risk revenue quantified	Data integrations, rubrics
Comp plan visibility and design	Develop a comp plan, communicate it, iterate on it	Better comp plans, more transparency	Comp logic encoded and made queryable
Executive strategy & planning	Sharpen strategy & tactics for go to market	Clarity, vision, alignment	Encoded goals, market realities, differentiators

Many ways to deploy revops AI, with 3 examples

Proprietary revops AI systems come with tradeoffs across cost, speed, convenience, integration, depth of proprietary logic, and other dimensions. The next page explores these considerations and the options available. The following three examples begin to showcase the types of tradeoffs and where teams can land.

A EXAMPLE A A standalone “revops brain” Low cost · fast · broad reach · high impact · proprietary reasoning · no integration	Revops teams benefit from a highly engineered Claude (or equivalent) environment. When the entire team has access to shared logic, differentiators, competitive landscape, decision rubrics, and go-to-market motions, the value curve rises sharply. Manual porting of data becomes a worthwhile tradeoff for immediate leverage in strategy, collateral creation, analysis, new-rep training and ramp, comp design, market research, sourcing, planning, and many other functions. Some teams stay with the standalone brain long-term, while others choose it as a proof of concept before committing to a more integrated version (see “integrated revops brain” below).
B EXAMPLE B An integrated revops brain Higher cost · slower deployment · broad reach · high impact · proprietary reasoning · integrated	When a team extends the standalone “revops brain” into an integrated system, the value grows exponentially as the cost and deploy timeline also expand. A common instance connects a central “brain” to a company CRM, ERP, and other data sources, with live pulls, a unified operational view, and custom dashboarding per company KPIs and mandates. This brings all the benefits of the standalone revops brain, minus the headache of manual data porting, plus the advantages of real-time intelligence and a broader range of insights and queryability.
C EXAMPLE C One configured workflow Low cost · quick · partly integrated · configured triage · narrow reach · high impact · proprietary reasoning	A thin automation layer with a proprietary reasoning harness can span several low-cost surfaces without any custom development. For example, an “early warning system” can alert a company to projects before they become RFPs. Custom logic layers parse data feeds with early signals and measure them against a rubric to surface projects that meet the firm's services. A human can review & signoff, and the ones that pass get forwarded via a routing layer to the person who needs to take action. There are thousands of workflows that can be similarly configured to drive high value for revops teams, all without point SaaS subscriptions or expensive custom development.

“Custom” doesn't always mean “expensive.”

In many cases, custom capabilities can cost less than out-of-the-box SaaS products, while vastly outperforming the latter.

Dimensions of consideration for AI deployment

As the previous page's examples show, custom capabilities don't necessarily require expensive builds. Nor do they preclude them. The following dimensionality graphic maps each example's location across the primary considerations that teams navigate. For instance, the standalone “revops brain” scores low on the cost axis, high on the breadth axis, and medium on the governance axis.

A Revops brain (standalone) **B** Revops brain (integrated)

C Lightweight workflow orchestration

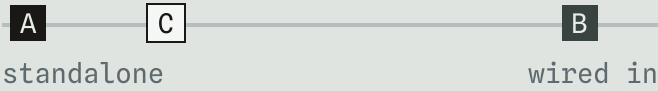
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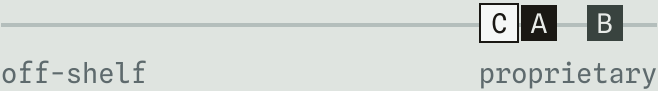
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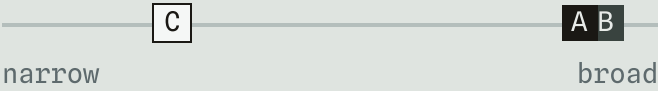
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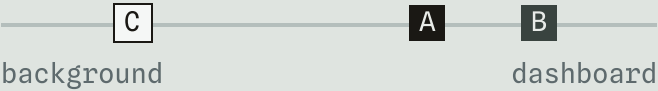
LOGIC & REASONING



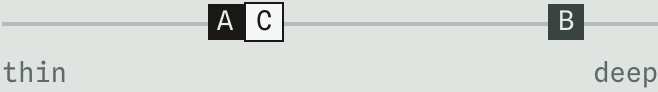
REACH



VISIBILITY



DATA DEPTH



GOVERNANCE



Dynamic systems thinking serves revops teams well

The “right answer” varies by company, and it varies for the same company over time. To make things even more dynamic, any action taken (or, for that matter, action deferred), moves the system and changes the variables for other decisions.

Teams that embrace this dynamic complexity thrive, while those clinging to a simplistic model tend to reap lower gains from technology. They tend to deploy technologies from a more naive posture, relying on vendor promises, and face disillusionment when the promised gains don't materialize.

Winning teams aren't looking for the correct solution. They're looking for a sequenced roadmap: what's the best set of tradeoffs today, and how does that serve as a launchpad to a future set of tradeoffs that's even more optimal?

AI saturates revenue work, yet most teams still report thin returns.

The revops SaaS market is large and growing, and AI adoption is near-universal. On average, efficiency and revenue gains are low. Our experience tells us that investment in proprietary configurations (a team's leveraging its own rubrics, logic, routines, and understanding) separates the champions from the teams picking up sub-5% returns.

\$52.68B AI sales & marketing market by 2030, from \$25.63B in 2025 (15.38% CAGR) ResearchAndMarkets, 2025	88% Organizations reporting regular AI use in at least one function, up from 78% McKinsey, 2025	9 in 10 Sales teams using AI agents, or expecting to within two years Salesforce, 2025
3 to 5% Modeled sales-productivity lift, part of a \$0.8–1.2T upside McKinsey, 2023	71% Teams reporting revenue gains from AI, though the most common lift is under 5% Stanford HAI, 2025	>30% Win-rate improvement from early AI deployments in sales Bain, 2025

Traditional SaaS promises an easy button. The software designer has studied a problem and designed a solution. You switch it on, and the problem is handled.

Geography, market conditions, technology shifts, competitor actions, and hundreds of other variables combine uniquely in every company. What is real, effective, and decisive for one team is beside the point for another, even when the two look identical on paper. And the same company has a different set of decisive variables at a different point in time.

In-house customization calibrates to the reality of one team's goals, rubrics, challenges, and logic. It captures the variables that actually decide the outcome, and adjusts to them as they shift. That fit is leverage. The tighter the calibration to a team's actual situation, the greater the performance, in general.

The SaaS conundrum, and why customization wins

CONCLUSION

A trend toward customization and away from tech sprawl.

Revops reality is messy and complex, yet there is a clear throughline. In general, revops teams get more value from AI when they leverage foundational platform technologies and build proprietary capabilities over them. These teams leverage a compounding “few-to-many” snowball effect that contrasts sharply with the sprawl and diffusion of the 1-to-1 SaaS paradigm. Investments into infrastructure such as foundational AI, context engineering, workflow integrations, and configurable logic are durable and can spawn dozens or even hundreds of distinct capabilities that capture the nuance of a team's unique needs and reasoning.

CAVEATS

CLAIMS ARE DIRECTIONAL & PROVISIONAL

These claims come from Talbot West working with corporate revenue teams and are synthesized with market insights from external sources. They are not claims about what's right for any specific company, nor do they claim to speak for the industry as a whole.

DATA ADVANTAGES TAKE TIME / “DATA” IS VARIED

Most companies sit on less than a year of usable proprietary data; few reach five. The advantage accrues with data depth, so it rewards early starts and often returns nothing overnight. Additionally, what qualifies as “data” is much larger than many companies realize; formalized logic, rubrics, and blueprints are highly useful data in their own right.

SOME FUNCTIONS ARE CORRECTLY BOUGHT OFF-THE-SHELF

Commodity data, telephony, deliverability, e-signature, and compliance infrastructure are usually best purchased or rented than developed. There's a cost-benefit analysis for every capability, and it leans hardest to in-house when it involves reasoning, logic, rubrics, decisionmaking, and insider knowledge.

THE IMPORTANCE OF ARCHITECTURE, PLANNING, AND GOVERNANCE

While outside the scope of this report, a focus on governance, long-term planning & sequencing, and solutions architecture sets companies up for long-term success.

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TALBOT WEST FIELD WORK	The report's assessment of where AI drives value in revenue teams draws on Talbot West's direct field work. Published sources above are cited only for market-level perspective and metrics.