COMPARING 7 REPORTS ON THE STATE OF GTM IN 2025

WHAT 7 INDUSTRY REPORTS REVEAL ABOUT REVENUE GROWTH, AI ADOPTION, AND THE EXECUTION GAP

Based on findings from Scale Venture Partners, Crossbeam/Pavilion, Fullcast, Ebsta/Pavilion, ICONIQ Growth, Clari/Salesloft, and Clari Labs

UNION SQUARE CONSULTING

KEY FINDINGS

87%
MISSED REVENUE TARGETS
87% of enterprises missed their revenue targets by >5%

64.6%
TOP REP CONCENTRATION
64.6% of all revenue generated by the top 10% of reps

52%
EXPANSION REVENUE
52% of new revenue came from existing customer expansion

-12.7%
SALES EFFICIENCY DECLINE
-12.7% decline in overall sales efficiency, despite rising deal values

48%
DATA NOT AI-READY
48% of enterprises say their revenue data is not AI-ready

67%
LIFT FROM GTM ALIGNMENT
67% more likely to hit revenue targets when GTM teams are fully aligned

3-5X
AI IMPACT MULTIPLIER
3-5x more likely to see increased pipeline and conversion when using AI for coaching, scoring, campaign analysis

8X
SALES EFFICIENCY WITH ICP FIT
8x higher sales efficiency when selling to high-ICP-fit accounts, yet 63% of CROs have little or no confidence in their ICP definition

71%
AI FOR TOP-OF-FUNNEL
71% use AI for call transcription, but only 25% for churn prediction

METHODOLOGY: ABOUT THE REPORTS

The seven reports span a wide range of data collection methods, company sizes, and sample sizes.
Understanding the differences in methodology matters, because the conclusions each report depend on what was measured and how.

Report Name	Published By	Data Source	Company Focus
State of GTM AI	Scale Venture Partners	Survey of 278 GTM Leaders and dozens of interviews	\$1M–\$1B+ revenue; horizontal/vertical SaaS, security, infrastructure; 69% sales-led
The Future of Revenue	Crossbeam & Pavilion	Survey of 400+ GTM leaders	B2B SaaS; avg. 250–499 employees; 96.9% Director+
State of GTM H1 2025	Fullcast	Pipeline data + CRO survey	B2B SaaS; seller performance and ICP discipline
GTM Benchmarks 2025	Ebsta & Pavilion	Pipeline data + survey + call analysis	IT services, media, professional services, healthcare; 0–1,000+ employees
State of GTM in 2025	ICONIQ Growth	Survey + portfolio operating data	\$10M–\$250M+ ARR; horizontal/vertical SaaS, fintech, infrastructure
Building the Foundation for AI-Ready GTM Data	Clari & Salesloft	Survey of enterprise leaders	North American enterprises; CIOs, CROs, VPs of Sales/RevOps/IT
State of Enterprise Revenue 2025	Clari Labs	Anonymized opportunity data	US enterprises, \$100M–\$5.5B+ revenue

Collectively, these reports represent data from well over 11 million pipeline opportunities worth more than \$91 billion, survey responses from over 3,100 GTM executives, and analysis of 240,000+ minutes of seller discovery calls. The companies studied range from early-stage startups under \$1M ARR to Fortune 500 enterprises with over \$5.5B in revenue.

1. THE AI ADOPTION AND IMPACT LANDSCAPE

AI in GTM has become tablestakes.
Scale VP found 2/3rds of teams use it regularly, with adoption highest in marketing (81%) and lowest in customer success (42%).

GTM SCIENCE Listen to our podcast with Craig Rosenburg where we dig deeper into Scale VP's report.

ICONIQ found most companies have at least moderately embedded AI into GTM. Ebsta/Pavilion found 88% of CROs cite automating manual tasks as their top AI application. Even among non-adopters, 80% say the barrier is experience, not skepticism.
But here's the thing: **adoption and impact are two very different conversations.**

PRODUCTIVITY GAINS ARE COMMON. REVENUE GAINS ARE ELUSIVE.

Scale VP draws a useful distinction between the different levels of AI implementation.

PHASE 1 AI

Productivity-focused implementation such as drafting, research, call summaries.

- These AI use cases are everywhere (87–90% of SDR teams, 84–88% of sales teams).
- About 85% of adopters see productivity gains.
- ICONIQ confirms this: the most common use cases are still top-of-funnel (call transcription at 71%, lead gen at 61%, content creation at 58%), and 69% of companies measure AI ROI through productivity alone.

But companies stuck in phase 1 AI are less likely to see measurable ROI impact

PHASE 2 AI

Implementation focused on driving business outcomes is where the revenue impact shows up. For example:

- Marketing teams using AI for campaign analysis and account scoring are 3-5x more likely to see increased pipeline and conversion.
- SDR teams using AI for prospect engagement are 3x more likely to increase qualified meetings.
- Sales teams using AI for coaching and next-best-action guidance are 3x more likely to lift win rates.

But only about half of adopters have started experimenting here, and just ~40% report high overall impact.

NONE OF THIS WORKS WITHOUT CLEAN DATA

This is one finding every report agrees on.

48% — 48% of enterprises doubt their revenue data is AI-ready. Only one-third of RevOps leaders fully trust their forecast data.

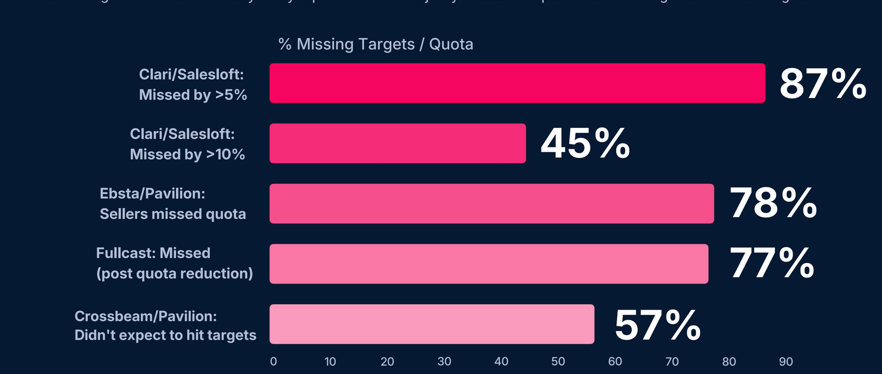
55% — 55% face conflicting pipeline signals from teams using different sources. 42% have no formal governance frameworks for revenue AI.

44% — 44% of contacts that sellers interact with aren't even in the CRM, and 26% of those missing contacts are senior decision-makers.

98% — 98% of CIOs say their collaboration with the CRO directly impacts revenue, yet 28% of CIO-CRO syncs happen monthly or less.

2. TARGETS ARE BEING MISSED AT EVERY LEVEL

This finding echoes across nearly every report: the vast majority of B2B companies are missing their revenue targets.



QUOTA MISSES ARE BECOMING THE INDUSTRY DEFAULT.

One important nuance: ICONIQ offers a different angle. The percentage of ramped AEs achieving quota has held relatively steady at 58%, and individual AE performance hasn't deteriorated further. The problem may be less about rep capability and moreaboutpipeline coverage declining(3.9x to3.6x) andconversionrates weakening deeper inthe funnel.

3. SALES EFFICIENCY IS DECLINING DESPITE AI INVESTMENT

Here's the counterintuitive finding: sales efficiency is trending downward even as deal values rise and AI adoption accelerates.

-12.7%
Overall sales efficiency decline calculated by Fullcast

+1.8%
Deal values increased, but win rates dropped 8.3% and sales cycles stretched nearly 7%

3-4 WEEKS
New logo sales cycle increase across most sectors (ICONIQ)

92 → 125 DAYS
Expansion deal cycles grew from Q1 2023 to Q4 2024 (Clari Labs)

THE PIPELINE QUALITY PROBLEM

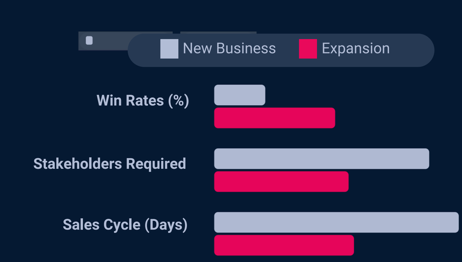
Pipeline quality is a major factor. Clari Labs found pipeline averages are **3x larger than closed-won numbers**, a critical execution gap. 65% of senior revenue leaders attribute hidden or incorrect forecast and pipeline details as a main driver of revenue leak, and Clari estimates **26% of company revenue is lost to it.**

4. EXPANSION REVENUE: THE PATH TO EFFICIENT GROWTH

Expansion still outperforms new business by nearly every metric **(and most companies are underinvesting in it)**.

EBSTA/PAVILLION'S REPORT FOUND: Selling to existing customers is 2.5x easier, with shorter sales cycles and requiring fewer stakeholders.

52%
52% of new revenue came from existing accounts in 2024



CLARI LABS' REPORT FOUND: Expansion accounts for 13% of won revenue per quarter, closing 20% faster with higher win rates, despite representing less than 5% of total pipeline.

Expansion · New Business

13% OF TOTAL WON REVENUE PER QUARTER

20% FASTER SALES CYCLES

5% OF TOTAL PIPELINE

Expansion ACV declined 50% year over year. While expansion is efficient, the average upsell is compressing for some companies. That compression matters. It means we need more expansion deals to generate the same revenue, making post-sales engagement, multi-threading, and CS-to-sales handoffs more critical than ever.

5. ICP DISCIPLINE SEPARATES WINNERS FROM LOSERS

Efficiency is declining, cycles are stretching, expansion ACV is compressing, and most teams are missing their number. Multiple reports point to the same root cause: too many teams are filling the pipeline with deals that aren't a good fit.

Fullcast found high-ICP-fit accounts are:

8X MORE SALES EFFICIENT

5.1X MORE VALUABLE OVER THEIR LIFETIME

4X MORE LIKELY TO EXPAND

2X LESS LIKELY TO CHURN

AND YET...

23% — HIGH-ICP-FIT ACCOUNTS MAKE UP ONLY 23% OF THE AVERAGE PIPELINE.

63% — 63% OF CROS HAVE LITTLE OR NO CONFIDENCE IN THEIR ICP DEFINITION.

56% — 56% STILL DEFINE ICP ON GUT FEELING.

64% — 64% REVIEW ICP DEFINITIONS ONCE A YEAR OR LESS.

QUALIFICATION TELLS THE SAME STORY

Well-qualified deals win 6.3x more often and close 21.6% faster, but only 36% of deals pass discovery with documented qualification. Top performers disqualify rigorously from discovery (34% more than average) and drive 75% win rates versus 22%.

And here's the compounding problem: Clari Labs found 98% of companies don't consistently track closed/lost reasons. We can't fix what we can't see, and most teams have no systematic way to identify why deals are dying.

6. CROSS-FUNCTIONAL ALIGNMENT IS A MEASURABLE REVENUE DRIVER

ICP discipline and qualification are team-level fundamentals. But even teams that get those right can lose deals at the handoff. The trend toward consolidating responsibility reflects a recognition that alignment gaps are too expensive to tolerate.

ALIGNED GTM TEAMS

67% More likely to hit revenue targets

38% Shorter sales cycles

2X More likely to succeed overall

MISALIGNED GTM TEAMS

48% More lost deals

70% Longer sales cycles

50% Higher acquisition costs

BROKEN HANDOFFS

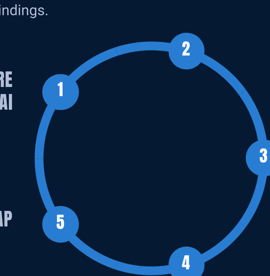
54% Teams lack functional handoffs between marketing and sales

46% Companies have shifted to full-cycle sales models (where sellers prospect, close, and grow accounts) partly to reduce handoff friction

The trend toward consolidating responsibility reflects a recognition that alignment gaps are too expensive to tolerate.

WHAT REVENUE LEADERS SHOULD DO NOW

These seven reports use different data sets, sample sizes, and methodologies, but they converge on the same patterns. Here's what we'd prioritize based on the findings.



1

FIX THE DATA FOUNDATION BEFORE ADDING MORE AI

Every report points to data quality as the primary bottleneck to AI ROI. 48% of enterprises doubt their data is AI-ready, 44% of seller contacts are missing from the CRM, and 55% of teams get conflicting pipeline signals. No amount of tooling will compensate. This is where we start with most of our clients, and it's consistently where we see the fastest ROI.

- **Audit CRM data completeness**, accuracy, and integration across platforms
- **Establish a governance framework.** The 42% of organizations operating without one are flying blind
- **Get CIO and CRO in the same room regularly.** 98% of enterprise leaders say this collaboration directly impacts revenue, yet 28% sync monthly or less

**All of this sits downstream from defining the GTM process clearly and driving the team to adopt and execute that process consistently. See our GTM Efficiency Pyramid for more details here.*

2

TIGHTEN ICP DISCIPLINE AND ENFORCE QUALIFICATION

High-ICP-fit accounts are 8x more efficient and 5.1x more valuable over their lifetime, yet they make up only 23% of the average pipeline. Well-qualified deals win 6.3x more often and close 21.6% faster. The math is clear: filling pipeline with low-fit, poorly qualified deals is the most expensive mistake a revenue team can make.

- **Move ICP from gut feeling** to data-driven analysis
- **Review it quarterly**, not annually. 64% review once a year or less
- **Enforce a written qualification standard** at discovery. Only 36% of deals currently have one
- **Start tracking closed/lost reasons** if you're among the 98% that don't

**This sits in the middle of two stages (Adoption/Optimization) of our GTM Efficiency Pyramid. Click here for more details.*

3

MOVE AI FROM PRODUCTIVITY GAINS TO REVENUE IMPACT

The data shows companies using AI to move department-level metrics (pipeline conversion, win rates, quota attainment) are 3-5x more likely to see measurable commercial impact. This is the kind of implementation work we do at USC, helping teams go from "we use AI" to "AI is helping us reach our numbers."

- **Pick Phase 2 use cases** where your data is cleanest (microsegmentation, campaign analysis, skills coaching, call scoring)
- **Scale those** before adding more tools
- **Measure revenue impact**, not just productivity. Only 43% of companies do this today

**This may be more correlation than causation. Teams with a finely-tuned GTM Engine are A) more likely to try Phase 2 use cases and B) more likely to succeed at them because they have the right GTM Ops team and foundation in place.*

4

INVEST IN EXPANSION LIKE THE GROWTH LEVER IT IS

Expansion deals close in 52 days vs. 91 for new logos, win at 45% vs. 19%, and require fewer stakeholders. Yet most organizations still over-resource new logo acquisition. With 52% of revenue already coming from existing accounts, the expansion motion needs investment, not leftovers.

- **Establish dedicated ownership** of the expansion motion
- **Build clear CS/sales alignment**
- **Sustain C-suite engagement.** It drives a 189% increase in expansion likelihood

5

CLOSE THE ALIGNMENT GAP

Aligned teams are 67% more likely to hit targets and report 38% shorter sales cycles. Misaligned teams see 70% longer cycles, 48% more lost deals, and 50% higher acquisition costs. This isn't a culture initiative. It's an operational one, and it's fixable.

- **Audit handoffs** between marketing and sales. 54% of teams lack functional ones
- **Consolidate ownership** where handoffs keep breaking. 46% of companies have moved to full-cycle models for this reason