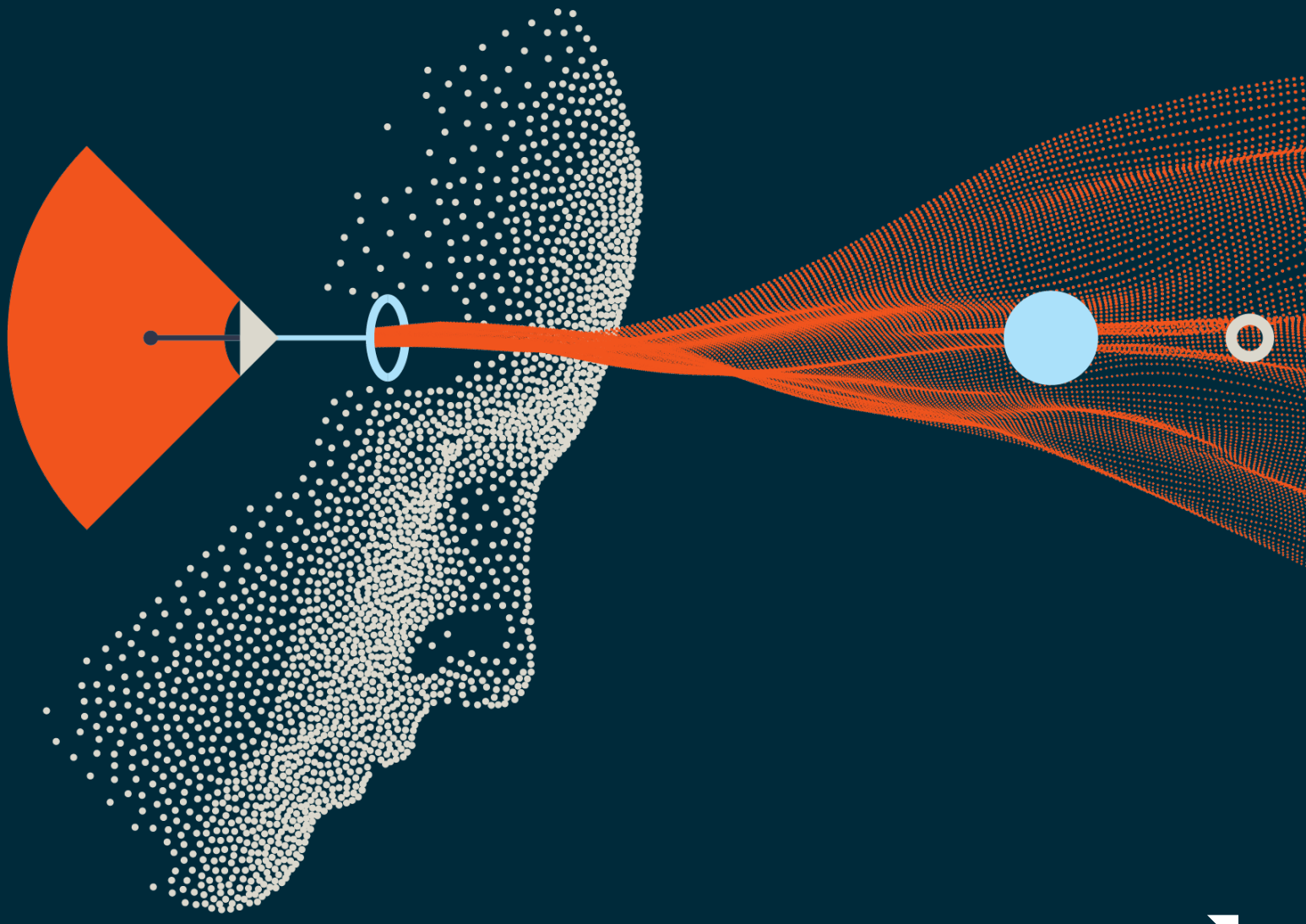
The CRO's Playbook for AI ROI in GTM



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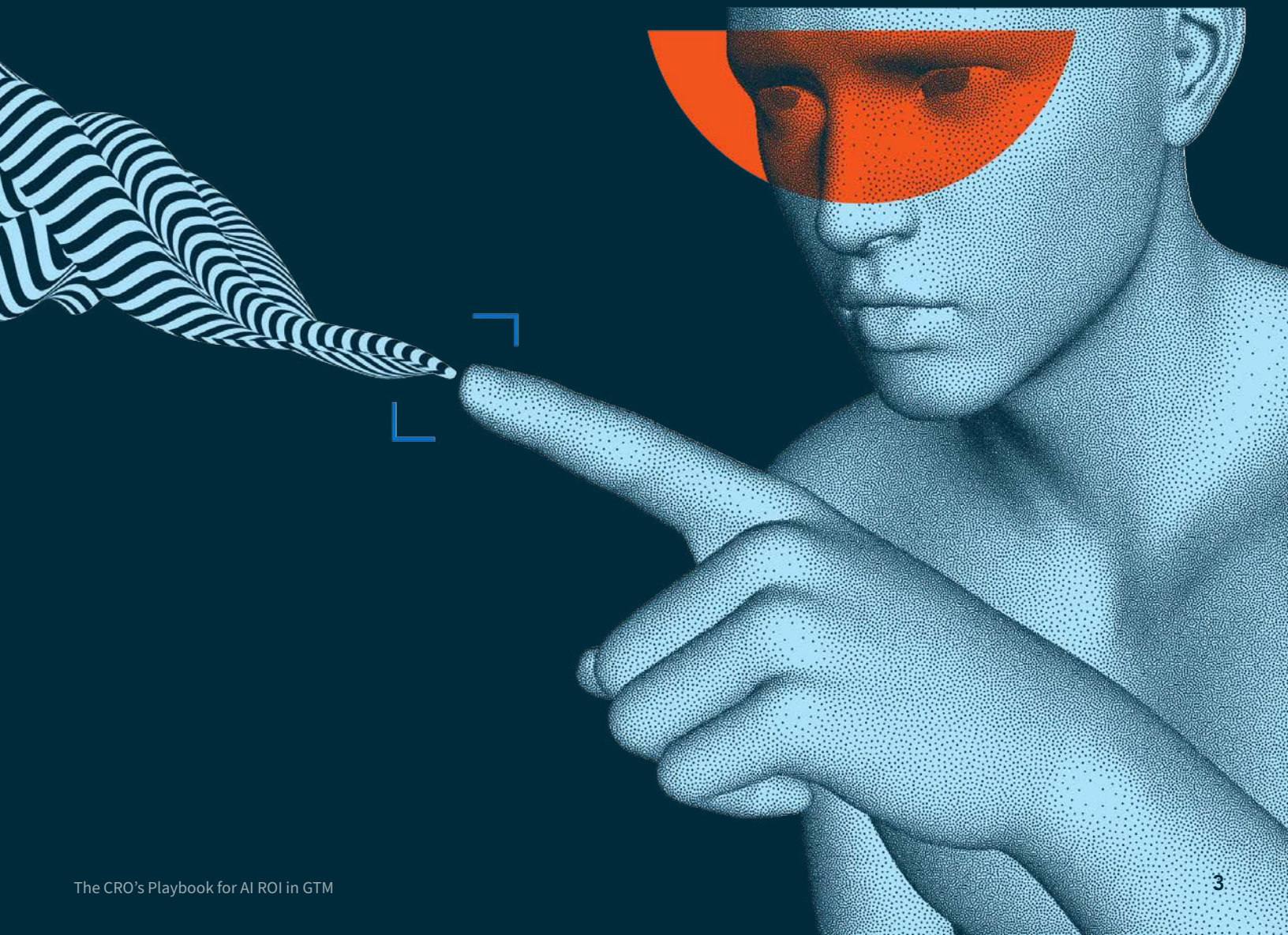
INTRODUCTION

Our firm's journey into exploring how artificial intelligence can deliver real business value for go-to-market (GTM) organizations started small.

Over the past 6 months, we organized a discussion around the topic at a dinner in London and invited ten chief revenue officers. We weren't sure we'd have that much to talk about, as so much of the AI discussion at that time was around specific, AI-native or -enabled software products—not how organizations can leverage AI to turbo-charge their sales and marketing operations. But what was originally scheduled as a 30-minute discussion about AI and GTM stretched into three hours, with plenty of insights flowing from the executives, who hailed from early-stage startups as well as larger, PE-backed companies with hundreds of millions in revenue.

THE REASON: It was clear that GTM leaders at all stages of company growth were still in the early innings of adopting AI into their organizations, and they are still struggling with understanding which AI tools and new processes deliver ROI. Since that first dinner, we've held a number of events with more than 50 CROs in New York, Boston, Austin and San Francisco to probe this ROI question further. It's a big issue inside organizations, as CFOs are hesitant to approve budget for untested tools that might promise increased productivity, but not necessarily increase revenue.

Based primarily on our recent CRO conversations, we put together this playbook to outline which AI products are actually delivering ROI right now. We start with an overview of the status quo, specifically AI's role in GTM currently. We'll also cover four domains within organizations where—according to the GTM leaders we convened over dinners—they found AI consistently delivers the highest returns. Then we move into a tool rationalization framework, to help GTM organizations rationalize the patchwork of AI tools most have—some inherited, some adopted by their teams, and a few they chose themselves. In section 5, the AI readiness checklist, CROs can assess their own company's readiness for AI adoption as well as identify areas to focus on before scaling AI investments. These assessments should reveal specific areas of the GTM stack as fertile ground for deploying AI tools. We round out the playbook with the top six use cases our CROs identified. The result? A prioritized, disciplined approach to AI that increases revenue and delivers ROI.



1 PUTTING AI INTO CONTEXT

Thirty years ago, chief revenue officers (CROs) faced a very different reality: Reps had neither the outbound automation nor inbound channels we take for granted today. They could not see intent signals from digital footprints, and there were no AI copilots to mentor them into top performers. Every lead was worked manually, every call was a shot in the dark, and every coaching session was anecdotal. Fast forward to today and GTM teams are swimming in tools. Many CROs report that their sellers juggle a dozen or more platforms. The question is no longer whether technology can help, but rather which tools actually deliver.

As a CRO at a software company you face a pivotal moment. Growth expectations remain high, budgets are scrutinized, and customer expectations are evolving rapidly. AI promises transformative benefits for GTM organizations—but only if it is deployed with a rigorous focus on ROI.

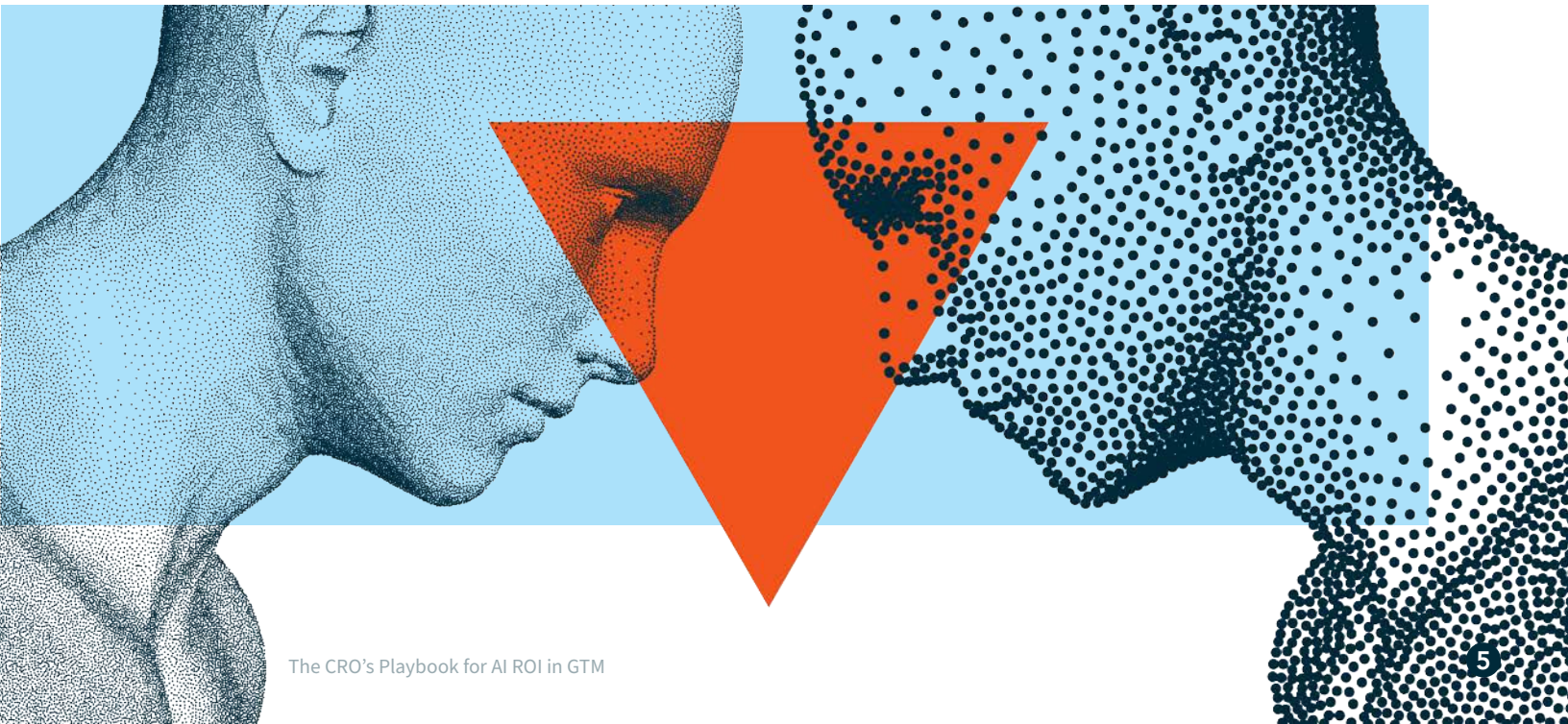
This playbook is designed as a comprehensive guide, with detailed frameworks, formulas, sensitivity analyses and a readiness checklist. It is intended to help you not only understand the ROI potential of AI but also communicate it effectively to your CEO, CFO and board.

2 | HOW AI IS ALREADY IMPACTING GTM TEAMS

AI's role in GTM is no longer hypothetical; integrations between leading platforms show what's possible. For example, Clay and Gong* recently announced an integration that connects prospecting intelligence with conversation intelligence. This enables sales development representatives (SDRs) and account executives (AEs) to identify and enrich the right accounts with Clay, while automatically feeding those insights into Gong for call tracking and coaching. The result is a tighter loop between top-of-funnel activity and mid-funnel deal execution, reducing manual effort and ensuring reps focus on the right opportunities.

One example comes from business communications software company GoTo, where Gong enabled sales leaders to coach at scale. By analyzing thousands of calls automatically, managers identified patterns in top-performer behaviors and scaled them across the team. Instead of listening to random snippets, leaders could zero in on the exact calls that mattered, improving coaching quality while freeing up hours of management time. The **impact** according to GoTo: higher win rates, more consistent methodology adherence and a stronger culture of data-driven selling.

These stories illustrate how AI is already amplifying GTM team performance by automating repetitive work, surfacing insights from conversations and scaling coaching and enablement. They provide a glimpse into how the ROI frameworks in the next section translate into daily practice.



3 | CRITICAL AREAS OF AI IN GTM

AI's impact on GTM is vast, but CROs must focus on the areas that consistently deliver the highest return. Without prioritization, teams risk layering tools that don't move the revenue needle. The four domains below—marketing, sales, customer success and revenue operations (RevOps)—represent areas where, in our experience, AI has shown the clearest ROI in practice. Each is interconnected: Better marketing pipeline inputs improve sales execution, stronger sales intelligence supports customer success, and RevOps underpins all of it with data quality and governance.

AI Use Cases	Primary Value	MEDDICC Framework	ROI Levers
MARKETING			
Lead scoring, personalization, campaign optimization, TAM identification, next-best prospect identification, multi-channel intent signals, automated SDR qualification	Marketing-generated pipeline that results in better pipeline quality and efficiency	AI quantifies pain through intent data, benchmarks measurable buyer signals and captures inbound through virtual SDRs.	More demos, higher lead to pipeline conversion, lower CAC, fewer SDRs needed
SALES			
Intent-driven prospecting, conversation intelligence, smart deal/pre 1:1 inspection, forecasting, AE onboarding	Improved rep productivity (measured in higher quotas, higher win rates, more buyer-facing time)	AI detects decision makers, extracts criteria from communication, validates champions and flags unqualified deals early	Increased sales attainment, higher SQ → Closed Won, reduced ramp time
CUSTOMER SUCCESS			
Churn prediction, upsell identification, AI support, fewer human touch resolutions	Stronger retention and net revenue retention (NRR)	AI identifies at-risk accounts (pain), quantifies business impact (metrics) and strengthens post-sale champions through proactive insights	Lower churn rate, higher expansion ARR, more accounts per customer success manager (CSM) with higher customer satisfaction (CSAT)
REVOPS			
Pricing optimization; territory planning; CRM hygiene, real time quota and capacity planning; fewer tools per AE; building of integrations, workflows, agents and applications	Structural efficiency and governance, moving from managing apps and workflows to owning/building them, fewer resources needed overall	AI creates real-time visibility into performance drivers, validates data quality and aligns systems to enforce consistent qualification and forecasting standards	Higher margins, more balanced coverage, cleaner data that's also real time

4 | TOOL RATIONALIZATION FRAMEWORK

When evaluating AI investments, CROs must also apply discipline to their technology stack. Tool overload is a common issue: Many GTM teams juggle a dozen or more platforms, leading to overlap, low adoption and CFO pushback. AI tools, while easier to pilot, magnify this risk.

Before introducing yet another solution, the first step is to take stock of what's already in the GTM team's hands today. This tool rationalization framework provides clarity on where existing tools deliver value, where redundancy exists and where gaps remain. It also provides insight on the build vs. buy question.

DECISION FACTOR	Keep	Replace/Sunset	Build Internally
Usage (adoption rate by seller)	>70% weekly active	<40% usage but business-critical	"Product" targets frequently used in a narrow or specialized use cases
Usage (agentic and/or automation)	Continuous running with little-to-no human involvement	Frequent human engagement for accuracy or other key metric demonstrating efficiency gain for sellers	Similar to above
ROI Evidence	Clear tie to SQLs, win rates, churn or hours saved	ROI exists but it's weak compared to alternatives	Build to target ROI gaps
Integration	Deeply embedded in CRM/stack	Poor integration of a necessary capability; creates silos/duplication of data or effort	Build if integration is core

5 | AI ROI READINESS CHECKLIST

CROs at GTM organizations are approaching AI from very different starting points. Some are working in rocket ships where revenue is accelerating past $100M ARR, while others face stalled growth in the $15-$50M range, and the mandate from management is to reignite momentum. In both cases AI promises leverage, but the path to realizing it depends heavily on organizational readiness.

The following checklist provides a structured way to evaluate that readiness. It helps CROs identify where to focus before scaling AI investments—whether that means improving data quality, strengthening RevOps foundations or aligning teams on adoption culture. The resulting score becomes more than a self-assessment. It's a conversation starter with your CEO/CFO and IT counterparts that ensures that future ROI discussions start from shared understanding, not assumptions.

Before we get deep into the checklist, it's worth highlighting a few overarching themes. AI's value for ROI depends on many factors. Consider how these factors apply to your organization as you dive into the checklist.

1

TEAM SIZE AND COMPOSITION

Larger teams amplify AI's ROI because improvements scale across more reps. Small teams may struggle to justify AI's costs.

2

REVENUE GROWTH RATE

Fast-growing companies need forecasting and productivity AI; slower-growth orgs benefit more from churn prevention.

3

SALES CYCLE LENGTH

Long cycles increase the value of AI forecasting and deal intelligence; short cycles reward investments in lead scoring and automation.

4

MARGIN PROFILE

Higher margins increase the profitability of retention and expansion, making churn AI tools more valuable.

5

COMPETITIVE INTENSITY

In crowded markets, even minor win-rate improvements will drive outsized ROI.

6

DATA QUALITY AND REVOPS MATURITY

Clean data enables accurate AI predictions; poor data will do the opposite and undermine AI's ROI.

7

GTM MOTION MIX

The dominant motion (sales-led, product-led, open-source-led) shapes which AI tools deliver the most value.

8

ADOPTION & CHANGE MANAGEMENT CULTURE

ROI depends on actually using the tools. Organizations with strong adoption cultures will realize AI's benefits faster.

9

AVERAGE CONTRACT VALUE (ACV)

Higher ACVs magnify the dollar impact of small win-rate lifts, whereas lower ACVs benefit more from automation and scale efficiency.

HOW TO SCORE THE CHECKLIST

Score each factor on a scale of 1–5 according to the scoring tables below. For table 2, you'll need to choose your org's predominant style of selling. Then combine your total score using both table 1 and table 2. Total possible score is 45.

SCORING TABLE #1

DIMENSION	1-2 (Low Readiness)	3 (Medium Readness)	4-5 (High Readiness)
Team Size and Composition	<10 reps; AI ROI is hard to justify	10–50 reps; ROI is possible in focused areas	>50 reps; ROI scales rapidly
Revenue Growth Rate	Flat or <10% YoY; AI should focus on churn	10–30% YoY; AI value is case-specific	>30% YoY; AI forecasting & productivity is critical
Sales Cyle Length	<2 months; pipeline automation is key	3–6 months; mix of tools valuable	>6 months; forecasting & coaching ROI dominate
Margin Profile	<40%; cost-to-serve AI matters most	40–70%; ROI from retention and efficiency	>70%; churn/expansion AI is very valuable
Competitive Intensity	Low; efficiency-driven	ROI Moderate; some fixes needed	High; small win-rate lifts = big impact
Data Quality and RevOps Maturity	Poor; AI underperforms	Moderate; some fixes needed	High; AI ROI fast and accurate
GTM Motion Mix	Motion misaligned with tools	Balanced mix; focus AI efforts on your predominant motion	Motion-aligned AI; ROI maximized
Adoption & Change Management	Low; shelfware risk	Pockets of adoption	High-adoption culture = ROI realized

In addition to the readiness factors outlined in scoring table #1, average contract value (ACV) is a critical—and more nuanced—consideration. Sales motions vary dramatically: On one end, product-led growth models rely on fully self-serve customer journeys; at the other end, complex enterprise sales require tight coordination across multiple people both within the GTM organization and inside the prospect's organization.

Because ACV fundamentally shapes which AI investments deliver meaningful ROI, CROs should reference the appropriate row in scoring table #2 and layer that assessment onto their score from the previous table. Together, these provide a more complete picture of organizational readiness and the expected return profile of AI across different GTM motions. Complete scoring table #2 below based on your organization's preferred motion (sales/enterprise or PLG) and add this value to your total readiness score.

SCORING TABLE #2

DIMENSION	1-2 (Low Readiness)	3 (Medium Readiness)	4-5 (High Readiness)
Average Contract Value *(Enterprise)*	<$10K automation required	$10K–$100K balanced ROI	>$100K even small percentage lifts create impact
Contract Value *(PLG)*	Heavy SDR reliance to qualify sign-ups or run early cycles; thin or inconsistent product telemetry	PLG motion functions but still relies on humans to fill gaps	PLG engine is fully instrumented and ≥60–70% of new ARR is self-serve

INTERPRETATION

Once you've completed both checklists, total your score to gauge your organization's readiness to capture real ROI from AI. The number itself isn't the goal. Rather, it's a directional signal of where to focus next. The following ranges outline what your score means and how to translate it into a practical next step for your GTM AI strategy.

Bottom line, no scoring methodology is perfect. It's quite possible to have both high readiness with a middling score. If that's you, don't hesitate! There's a whole new emerging role within traditional RevOps organizations: GTM engineers who can help you scale both fast and intelligently. Conversely, if your score indicates low readiness, focus on the basics first. Structure your data and get your house in order before scaling into AI. Use your best judgment and you'll be on your way.

35–45
HIGH READINESS
Scale AI

25–34
MEDIUM READINESS
Targeted proofs of concept (POCs)

<25
LOW READINESS
Fix foundations first

6 GTM MOTION STRATEGY

SALES-LED vs. PRODUCT-LED vs. OPEN SOURCE

Different GTM motions fundamentally shape where AI generates ROI, how you structure POCs, and what metrics you prioritize. A CRO must tailor AI strategy to the dominant motion in their business, and increasingly to hybrids where sales-led growth (SLG), product-led growth (PLG), and open-source system (OSS) growth coexist.

SALES-LED GROWTH

CORE DYNAMICS

Human-led enterprise selling means longer cycles, complex buying committees, large ACVs. Efficiency and forecast accuracy tools will deliver outsized value.

POC METRICS

Win rate: +5–10 pts
Ramp time: −20–30%
Forecast variance: ≥20% improvement

STRATEGIC IMPLICATION

In SLG-heavy orgs, AI is not optional; even a 1–2% win-rate shift can decide market share.

AI SWEET SPOTS

Intent prospecting & account prioritization:
Parse earnings calls, press releases, hiring signals to surface high-probability accounts.

Conversation intelligence & coaching:
Data-driven deal reviews compress AE ramp and lift win rates.

Forecasting & deal health:
Stage-progression and risk scoring reduce “happy ears” bias; double-digit forecast accuracy gains.

Pricing discipline:
Enforce discount guardrails; test packaging in real time.

PRODUCT-LED GROWTH

CORE DYNAMICS

Self-serve product drives top-of-funnel; sales lands expansions/enterprise. Funnel conversion and speed-to-value dominate.

POC METRICS

Activation → Paid conversion: +10–15%
Self-serve resolution rate: +20–30%
CAC payback: ≥1 quarter faster

STRATEGIC IMPLICATION

AI is the multiplier that scales from 50 to 500 customers without linear headcount; often the strongest CFO-cited ROI in PLG orgs.

AI SWEET SPOTS

Trial → paid conversion:
Predict converters from in-product behavior; trigger nudges/outreach.

Personalized onboarding:
Role/region/usage-aware flows compress time-to-first-value.

Support deflection:
Assistants resolve Tier-1 instantly, maintain CSAT, lower cost.

Expansion identification:
Telemetry-based cohoro scoring facilitates upsell/cross-sell.

OPEN SOURCE-LED (COMMUNITY → COMMERCIAL)

CORE DYNAMICS

Community adoption fuels top of funnel; monetization via support/hosted/licensing. CRO focus is to convert community users while protecting trust.

POC METRICS

OSS → MQL conversion: +15–20%
Enterprise attach rate: +10%
Support cost/OSS user: ≥15% reduction

STRATEGIC IMPLICATION

AI is both scalpel and shield—it enables precise conversion plays, but requires careful governance to avoid alienating the community.

AI SWEET SPOTS

Community intelligence:
Cluster GitHub issues, Slack/Discord, forums to find gaps/signals.

Lead enrichment:
Link contributors to corporate domains without heavy manual work.

License compliance:
Detect at-risk overuse or fair-use exceedance.

Conversion analytics:
Score OSS projects/users most likely to convert.

7 | THE ROI FRAMEWORK FOR AI IN GTM

The assessments above should reveal specific areas of the GTM stack as fertile ground for deploying AI tools. That said, calculating a precise ROI for a sale tool is a challenge for even the most sophisticated organizations. CROs, as with many peers across the organization, are still in learning mode on AI and agentic tools.

In practice, there are four areas where GTM organizations will likely gain leverage from AI:

REVENUE IMPACT

How much incremental revenue can AI drive by improving lead generation, conversion, upsell and renewal rates?

EFFICIENCY GAINS

How much time, effort or cost is saved by automating manual tasks, reducing admin burden or accelerating cycles?

CUSTOMER EXPERIENCE

How does AI improve customer retention, satisfaction (net promoter score) and lifetime value?

RISK MITIGATION

Does AI reduce forecast variance, improve compliance or mitigate the risk of missed opportunities?

Similarly, the cost of rolling out a new AI solution is equally challenging to quantify. A few key considerations include:

SOFTWARE COST

What will we pay for licenses or usage-based fees today, and how might those costs scale as adoption or data volume grows?

CHANGE MANAGEMENT

What resources will be needed to train teams, reinforce new behaviors and drive ongoing adoption so the tool actually gets used?

IMPLEMENTATION

How much RevOps, engineering and vendor support time will be required to integrate this tool, configure workflows and ensure data quality before it produces value?

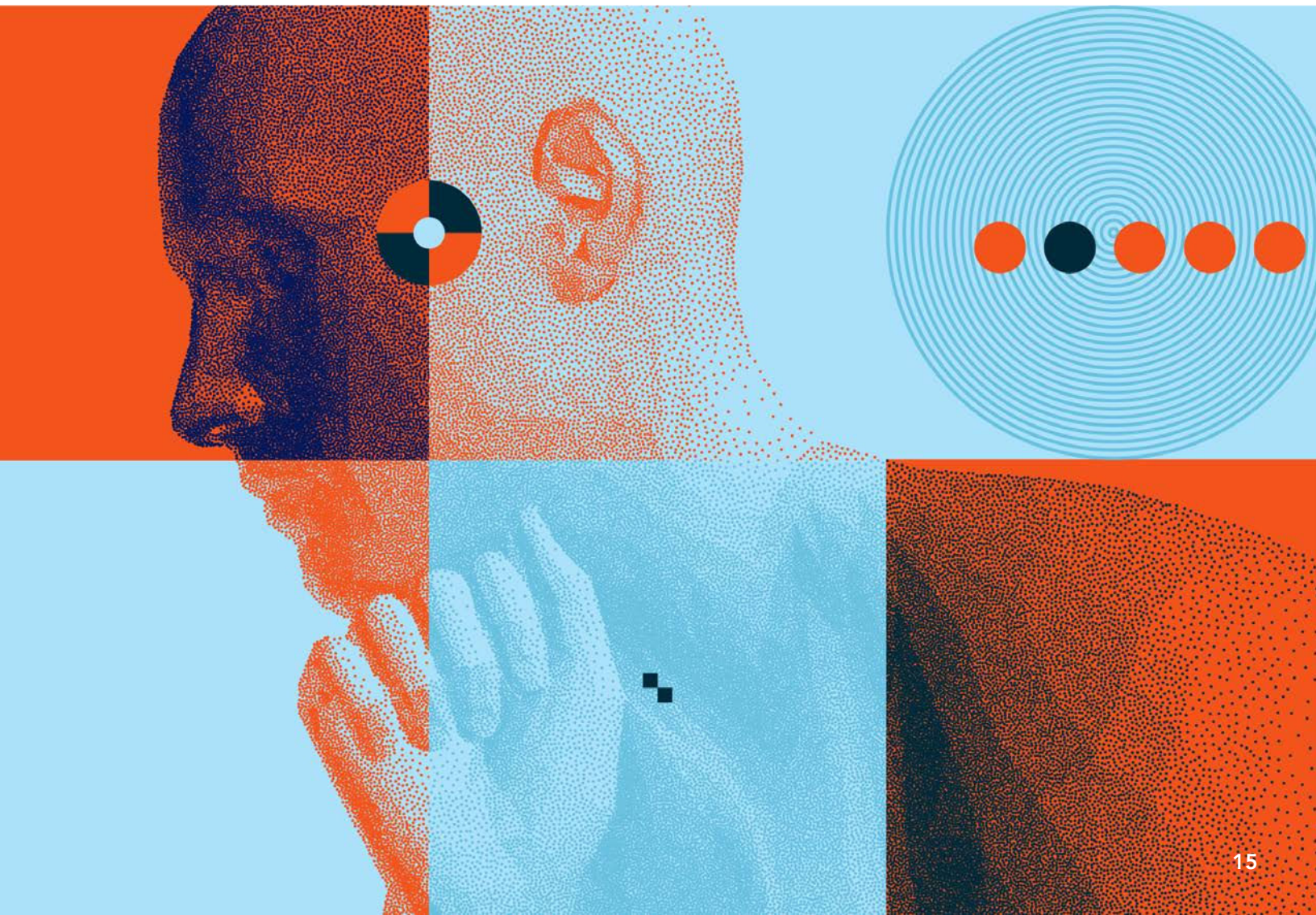
OVERSIGHT

How will we monitor and maintain the quality, accuracy and reliability of the AI's outputs over time? Who will own that governance as our data, workflows and GTM motions evolve?

If put into a Master ROI formula, the result would be:

$$ROI = \frac{(\text{Revenue Lift} + \text{Cost Savings} + \text{Risk Reduction}) - \text{AI Costs}}{\text{AI Costs}}$$

To further complicate the ROI discussion, CROs must resist the urge to view each tool in isolation. The true measure of value comes from how a platform contributes to the overall revenue engine. Every purchase should be assessed through a consistent lens that balances short-term productivity gains with long-term revenue impact.



8 CONCLUSION

AI is transforming GTM organizations by helping teams sell more efficiently and more effectively. With AI automating repetitive tasks, teams are running faster deal cycles, achieving more accurate forecasts and giving reps more time for high-value selling. The result is the ability to raise quotas, streamline SDR teams and reward the work that truly drives revenue—insight, coaching and customer impact. The future GTM org is leaner, smarter and more empowered.

The CRO playbook for AI is all about discipline and prioritization. We hope this guide will help you accomplish the following:

Turn AI from a vague priority into a concrete GTM roadmap

Our checklists and scoring tables should translate into a sequenced plan of which motions, use cases and teams to tackle with AI in the next 3-6 months.

Modernize your GTM stack to attract and retain top sellers

Use the tool rationalization framework and ROI lenses to cut low-value tools, embed AI that removes admin work and give high performers the copilots and data they need to excel.

Separate signal from noise in the GTM AI market

Map tools to your motion, ACV and AI readiness and say “no” to everything that doesn’t clearly move pipeline, win rates, retention or margin.

From that initial dinner in London to today, Battery has gathered the top six use cases for CROs to implement. Watch the Battery blog for this crucial follow-up read.

With the right approach, the CROs in our network believe AI can deliver **5–40x ROI** in GTM, while strengthening the CRO’s credibility with the board and positioning her as the growth architect of the company.

We also want to continue the spirit of our AI-focused dinners and the great conversations we had. What’s working for you as you scale AI? Get in touch!

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