

GUIDE

What AI Exposes About Your Sales Team:

A GUIDE TO WHAT HELPS, WHAT HURTS, AND WHAT WINS

A Decision Framework for CROs To Future-Proof Their Revenue Strategies.



Who We Interviewed

CROs at the top of their game



Tara Clever
CRO, Margin Edge



Mike Head
CRO, PartnerStack



Petar Iliev
CRO, TaxDome



Andrew Mahr
CRO, Wpromote



Cassie Fields
CRO, Hostaway



Michael Maimone
CRO, LucidLink



What This Is

An honest look at where AI is earning its place in high-performing sales organizations.

The insights come from six CROs who have spent the last 12 to 24 months building the infrastructure to make AI work in practice.



What This Isn't

A tool guide. A vendor comparison. A list of AI use cases to copy and paste into your next planning cycle.

This isn't a piece about which AI tools to buy or how fast to deploy them. It's about whether your organization is built to make them matter, and what to do if it isn't.



AI Puts Pressure on Human Judgment (And That's a Good Thing)

If you're a sales leader who has sat through an AI vendor demo in the last 12-18 months and thought, "this is impressive, but I'm not sure what problem it's actually solving for my team," you're not alone, and you're not wrong to hesitate.

This happens because nearly all the conversations around AI tools up until this point have been almost entirely about throughput, and almost nothing about the harder question underneath:

what does your team actually need to do differently with this technology to win?

We spoke with six CROs who have spent the last year doing exactly that.

And what we heard was that AI doesn't just make sales organizations faster. It makes them more honest by:

Forcing clarity on what you actually believe

You can't let AI score deals without defining what "good" looks like first.

Exposing the gaps you could previously paper over

Inconsistent data, fuzzy qualification processes, undefined priorities, and managers who coach from gut feeling.

Compressing decision timelines

So the cost of bad judgment arrives faster, and raises the stakes on where you deploy humans.



To truly benefit from AI today, sales teams need the decision-making clarity, operational discipline, and coaching infrastructure to make AI insight land in actual behavior change.

True AI readiness isn't a single investment.

It's a sequence — and most organizations are trying to skip steps.

STEPS

DATA LAYER

Structured, governed, and reliable enough to build on.

DECISION LAYER

Defined criteria for what gets automated, escalated, or protected.

EXECUTION LAYER

The systems where AI insight lands in actual rep behavior.

AI LAYER

The compounding return on everything underneath it.

The teams pulling ahead got the order right. They fixed their data before they built their decision logic. They built their decision logic before they automated execution. And they let AI compound on top of a foundation that was actually ready for it.

The sections that follow examine each layer: where the CROs we spoke with are seeing returns, where they're drawing hard lines, and what separates the organizations that turn AI insight into behavior change from the ones still waiting for the tools to do that work for them.

Where AI Earns Its Seat at the (Coveted) Sales Table

Walk into any sales technology conversation right now, and you'll encounter a dizzying taxonomy: AI-native tools built from the ground up on large language models, legacy platforms retrofitting AI layers onto existing products, custom-built internal agents, and enough acronyms to fill a glossary.

So with all of these options, what are CROs deploying in the field today?

» Smart Prioritization

Putting Your Team at the Right Place at the Right Time

The CROs we spoke with aren't using AI to do more. They're using it to do better.

Petar Iliev, CRO of TaxDome, put it directly:

"The cool thing with AI is that it's not just about how much activity you do. It puts you in the position to be at the right place at the right time."

Mike Head

at PartnerStack

Routes intent signals differently based on account value, so lower-value accounts get fully automated outbound while high-value accounts trigger AE notifications with pre-built research already loaded.

Michael Maimone

at LucidLink

Takes a similar approach, using intent data to surface which accounts need immediate attention and which are ready to engage.

» In both cases, **AI is deciding when and where human judgment is warranted.**

Michael Maimone also rightfully pointed out that the prioritization challenge gets more complex when you factor in territory equity. When your total addressable market is concentrated on the coasts, but your reps are distributed nationally, "right place, right time" becomes a structural question before it's ever a technology question.

AI can't define what a high-value account looks like for your business, where coverage gaps exist in your territory, or how to route the right opportunity to the right rep. **That logic lives in territory design.**

* **Territory Planner** is built for exactly this work: modeling coverage, balancing opportunity distribution across reps, and giving leaders the visibility to find and fix misalignment before it compounds.

» How CROs can use AI for prioritization this quarter:



Audit and fix the territory structure first. If your coverage model doesn't reflect where your TAM lives, AI will route signals efficiently to the wrong places.



Define what a high-value account looks like in writing. If that definition isn't documented, every prioritization output inherits the ambiguity.



Audit whether rep activity is driven by a system or individual instinct. If it's the latter, you don't have a prioritization infrastructure yet.

Strategic Guidance: Coaching at Scale

No matter which CRO we spoke with, one AI use case came up more than any other: **coaching**.

And that's likely because it's where operational gaps are most exposed (and paved over).

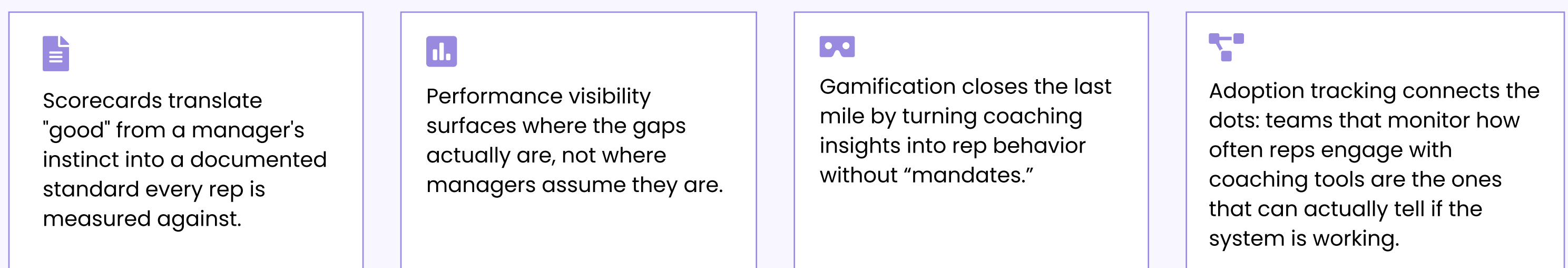
The biggest one is coaching consistency.

Historically, coaching quality has been a function of which manager you report to, which calls they happened to observe, and how well their instincts mapped to your deals. AI breaks that dependency.



These are genuinely impressive builds. But here's what makes them work: every one of them sits on top of a defined system.

The AI doesn't generate coaching recommendations from thin air. Instead, it generates a **coaching plan against a pre-defined standard**:



* That receiving infrastructure is what **LevelEleven** is built to provide, connecting coaching cadences, real-time scorecards, and performance engagement into the system where AI insight has somewhere strong to land.

» What to do this quarter:



Define what "good" looks like before you automate anything, including scorecards, discovery criteria, and qualification standards, so AI has something to coach against.



Audit your coaching infrastructure. Ensure you have the performance visibility, rep accountability systems, and manager workflows to act on what AI surfaces.



Calculate your actual coaching-to-rep ratio. If managers are reviewing fewer than two deals per rep per month, you likely have a coverage gap, and no AI coaching tool will fix it if the management layer isn't there to receive and act on the signals.

→ EXECUTION LAYER

Data-Driven Predictions: Forecasting and Risk Signals

AI can flag a deal at risk, identify a churning account, or surface an expansion candidate weeks before CS would have found it. What it can't do is decide what happens next.

Those decisions—who gets notified, what action is triggered, how quickly the signal reaches the right person—live in your process infrastructure.

That's what you need to operationalize to get the most from AI forecasting.

Petar Iliev

Customer success team, for instance, uses AI to monitor for behavioral signals that indicate an account is starting to evaluate alternatives—competitor research, searches for "[Tool] alternative," changes in product engagement patterns. These signals arrive early enough to enable proactive intervention rather than defensive retention conversations.

Mike Head

Is building toward AI-powered forecasting by applying closed-lost versus closed-won analysis to open pipeline, essentially asking, "Which of these active deals look like the ones that historically ended badly?"

Cassie Fields

Is approaching the forecasting gap by building a proprietary forecasting application, connected directly to her CRM, to provide richer, more action-oriented data and workflows.

But none of this works without the operational layer underneath it.

The CROs who are seeing real returns named the same prerequisites:



Clean CRM data with consistent stage management and closed-lost discipline, so historical patterns are reliable.



Defined ownership for every signal. This ensures a risk flag reaches the right rep and triggers the right action.

That's the role [LevelEleven](#) plays: connecting AI-surfaced signals to rep accountability and manager visibility in real time.



Process clarity about what AI is expected to produce at each step and how you'll measure whether it's working.

Point it at a pipeline full of vapor opportunities and inconsistent stage data, and it will produce confident predictions built on a foundation that doesn't reflect reality. Fix the process first, and it compounds from there.

» How CROs can use AI for forecasting this quarter:



Identify your most predictable churn signals and build a structure to systematically monitor them.



Run a triangulation exercise on your current forecast. Take your bottoms-up number, your tops-down target, and one external data point (historical close rates by stage, pipeline coverage ratio, or a planning tool output) and see where they diverge. That divergence is usually where the forecast risk lives.



Start with a clear hypothesis about what you're trying to predict, then find (or build) the tools to test it.

Feeling inspired to dig into where AI can make meaningful changes in your sales process? Determine where your organization is on the readiness scale and tips to prioritize new initiatives.

[Get AI-Ready](#)

Where Sales Teams Should Be Skeptical About AI

Every CRO we spoke with was optimistic about AI. They shared wins, use cases, and plans to go deeper.

But they also drew a line—sometimes a really hard line.

Sometimes it was explicit, like a formal policy, a tool turned off, a "no AI zone" written into the workflow.



Sometimes it was learned the hard way, after watching a promising experiment backfire.



What we heard surprised us. **The risks aren't where most people expect them to be.**

→ DECISION LAYER

The Productivity vs. Proficiency Trap

We want AI to make our teams more productive. No one argues with that.

But what do we lose when productivity becomes the primary goal?

Here's a story that illustrates the tension.

Mike Head implemented AI to auto-fill MEDDIC qualification fields after every call. The output was excellent—accurate, thorough, consistently formatted. Reps saved hours every week. Managers got better data.

He called it a win.



Andrew Mahr tried the exact same use case. Same initial results. But then something troubling emerged: reps stopped thinking about their own deals. They couldn't articulate where opportunities stood without checking the AI-generated notes. The muscle memory that comes from doing the translation work yourself was gone.

So he turned it off.

Same tool. Same use case. Opposite conclusions.

🗨️ **Andrew** articulated the tension precisely:

"Yes, AI makes the reps faster, it makes them more productive, but it can also make them less proficient. And for AI to succeed, it needs to make people more productive AND more proficient."

But there's no universal answer. Some CROs define explicit "no AI zones" for tasks where the thinking is the work. Others lean in and trust their teams to stay sharp.

A third path, methodical validation, is what Cassie Fields is building. She's not flipping the switch on CRM field automation all at once. Her plan is to "Continue to have our reps fill out this information and run the AI alongside it for a period to validate how accurate the AI is versus rep-led, and then completely automate."

🗨️ And **Petar Iliev** cuts to the root of it:

"If someone was not a good executor before, then they're not going to become a better executor with AI. If their mindset is not 'get it done,' there's not much you can do."

AI doesn't fix weak fundamentals. It reveals them faster.

» The Risk of Automation Fatigue

AI-powered outreach is everywhere right now, from automated sequences to AI-written emails and chatbot-first support experiences. In some cases, it's working. But tolerance has a ceiling.

🗨️ **Tara Clever** sees it clearly:

"The pendulum is swinging to this over-saturation of AI automation and customer tolerance for some of that is going to go down."

Her framework is a question every sales leader should be asking right now: "What can you automate versus what should you automate?"

The answer at MarginEdge is shaped by their customer-base. Tara said:

🗨️ *"We can train you on our CRM, but we can't train you on your lived experience. That spark is what we're calling 'proof of human.' And we're using that policy to answer the critical question of how to show 'proof of human' in an AI-saturated marketplace."*

This is where the operational maturity argument cuts both ways.

Teams without a clear framework for where humans belong will over-automate by default.

The teams that get this right have made the "stay human" decision explicit: which accounts, which moments, and which conversations require a person and have built that logic into their territory structure and account assignments.

That might look like a decision matrix, policy document, or a defined escalation path.

→ DECISION LAYER

» Before you automate, ask yourself:

1. Is the cost of failure low?

A misrouted low-value lead is recoverable. A botched enterprise renewal conversation isn't.

2. Does this task require human judgment?

If empathy, context, or lived experience is what makes the output good, automation won't replicate it—it'll just make the gap invisible.

3. Will automation cause reps to stop thinking?

If the thinking is the work, removing the friction removes the skill.

4. Can we detect mistakes quickly?

Fast sales cycles give you a short feedback loop. Long-cycle enterprise deals can absorb months of bad AI output before the damage surfaces.

If the answer to questions 2 or 3 is yes, stop. The automation isn't worth the risk. Everything else requires a judgment call, which, as it turns out, is exactly what AI can't make for you.



→ DATA LAYER

The Roadblocks Sales Teams Face With Broad AI Adoption

AI generates a lot of insights, but most of them die in dashboards.

The teams pulling ahead built a system to make AI insight land in frontline behavior. And you need these three things to do it.

» Data Quality

We have to say it: AI is brutally honest about bad data.

Every CRO we interviewed learned this firsthand.

 **Mike Head** put it plainly:

"If we didn't have our data in order, it was really hard to make those tools usable." His team spent months on data hygiene before any AI investment delivered returns.

Data quality also has a structural dimension that goes beyond CRM hygiene. AI needs to know which accounts belong to which territories, which reps own which opportunities, and how performance connects to activity. Without that structure, even clean data produces the wrong outputs.

* [Geopointe](#) addresses exactly this layer by giving revenue teams geographic visibility into account ownership, territory boundaries, and coverage distribution so that the structural data AI depends on is accurate before any signal gets processed, and saves teams valuable time.

Learn how Rogers improved sales performance by aligning goals, simplifying execution, and motivating the right behaviors.

[Discover Tangible Business Impact](#)

» Data Governance and Compliance

But data quality isn't just about clean records. For organizations operating across multiple geographies with customer PII, compliance obligations, and data-sharing agreements, the problem is structural.

Michael Maimone had to build an AI governance policy before deploying a single tool. His team works under DPAs for essentially every customer engagement, with significant presence in the UK, EU, and California, and each jurisdiction carries its own requirements for how customer data can interact with AI systems.

He said:

"If you don't widely adopt a specific AI tool, everybody goes on their phone and uses their own version, and you don't know what is actually going out into the ether."

To get ahead of this, you can provide enterprise-grade, compliant tooling so reps aren't making their own security decisions in the background.

» Process Clarity

For AI to be effective, it needs to operate from a strong base, and processes are one of the most important components of that.

Andrew Mahr said it directly:

"AI is an accelerant and an improvement on process, but it's not a replacement for process."

Petar Iliev is equally unambiguous:

"If you don't have playbooks, AI is not going to generate those for you. At least not well."

Without clear workflows and defined expectations, AI automates confusion at scale. The CROs seeing results knew exactly what output they expected from AI at each step, how to measure whether it was working, and when to pull the plug if it wasn't.

What Separates the Teams That Win with AI?

Twelve months from now, the gap won't be between teams using AI and teams that aren't.

It'll be between teams that turned AI into a system and teams still treating it like a standalone science experiment.

The CROs we spoke to have already crossed that line. Here's what they did differently.

» They Build Decision Frameworks, Not Tool Stacks

Most teams evaluate AI tools based on features, deploy them based on vendor promises, and then wonder why nothing sticks. The problem is that there's no system underneath to make the outputs useful.

Michael Maimone is thinking about this at an architectural scale. His view is that the future of AI is agentic workflows drawing from a single centralized data repository.

"All of our agentic workflows, customer scoring, lead scoring, account scoring, account prioritization, win-loss analysis, pipeline coverage metrics—we'll be able to them through agentic workflows and pump them back into our CRM... giving us one nexus of ownership."

What makes this architectural vision meaningful is what it enables at the decision layer. When all of that data flows through a single system, the framework for acting on that data becomes dramatically cleaner.

Additionally, he sees how AI can give you the data to make the right decision guideposts.

"AI can trace a high-LTV customer back to their very first marketing touchpoint and pattern-match what made them different: what they attended, what they engaged with, how they progressed."

Once you know that high-LTV customers tend to arrive through executive roundtable dinners, engage with a specific sequence of content, and convert after a certain type of discovery conversation, you have the raw material for a decision framework, not just a retrospective insight.



You can encode those patterns into your scoring models.



You can build routing logic that moves accounts matching that profile into a different workflow.



You can set up alerts when a prospect's behavior starts resembling your best customers at the top of the funnel.

» They Treat RevOps Maturity as a Competitive Advantage

For the CROs we spoke with, RevOps maturity is the variable that determines how much leverage every AI investment delivers.

Mike Head thinks that the teams that are winning with AI today largely built the infrastructure before they needed it. "Companies that are going to be most successful are going to have heavier RevOps investments."

What makes that observation pointed is the timing. The advantage isn't just that they're ahead, it's that teams playing catch-up now have to:

Fix their foundation



Build on top of it simultaneously

This comes down to building a revenue infrastructure built to receive and act on signals. Doing so gives you the foundation to extract compounding leverage from every AI investment.

But as **Tara** points out, the timing of your investment and deployment is imperative. She's thinking about risk management in terms of introducing AI into an organization where the data ingestion, normalization, and governance aren't stable enough to make outputs trustworthy.

As she puts it, "A merge onto a fast-moving highway is fine if your car is ready. It's catastrophic if it isn't."

RevOps maturity is what makes the merge possible at all and what determines whether you accelerate once you're in traffic or immediately become an obstacle.

» They Bias Toward Action

Build an AI Structure that Drives Your Team Forward

Top-performing teams are methodical. They're also decisive.

The infrastructure they built—territory models, coaching systems, clean data—gives them permission to move fast.

And movement, even imperfect movement, beats standing still.

Petar Iliev runs his team on this principle:

"A top-performing team with AI is simply a culture of action. They don't just analyze things—they trust the data they have built and make smart decisions based on that."

When the underlying foundation is sound, the cost of an imperfect decision is recoverable. The cost of standing still isn't.

» Their Leaders Model AI Usage

The early wave of AI adoption was bound by grass-roots style experimentation.

Petar Iliev runs his team on this principle:

"A top-performing team with AI is simply a culture of action. They don't just analyze things—they trust the data they have built and make smart decisions based on that."

When a CRO references the same AI-generated coaching scorecard in a 1:1 that reps are being asked to trust, adoption follows. When a VP pulls up the same territory view that reps are expected to work from, the signal is clear: this is real, and the logic is sound. When leaders stake decisions on the system, reps stop resisting and start leaning in.

Build an AI Structure that Drives Your Team Forward

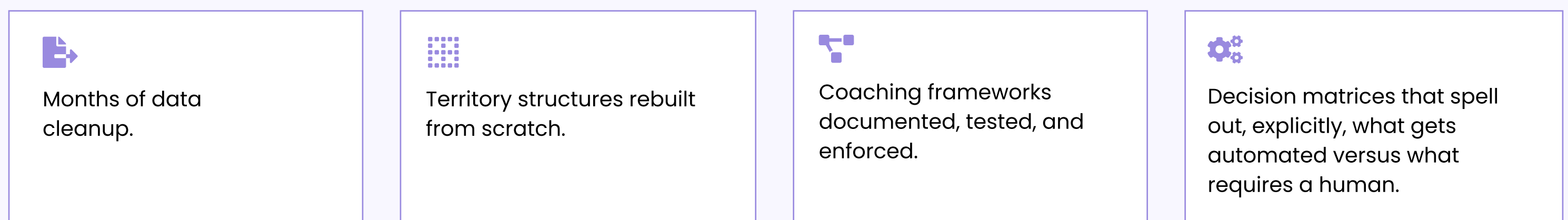
Here's what we know: AI isn't going away.

The tools will keep getting better. Models will get smarter. Every vendor will arrive in your inbox promising faster insights, cleaner predictions, and easier workflows than whatever you're running today.

None of that matters if there's nowhere for the insight to land.

The CROs we spoke with aren't waiting for the perfect tool. They're building the system that makes any tool useful, and they started that work before they knew exactly which AI investments would pay off.

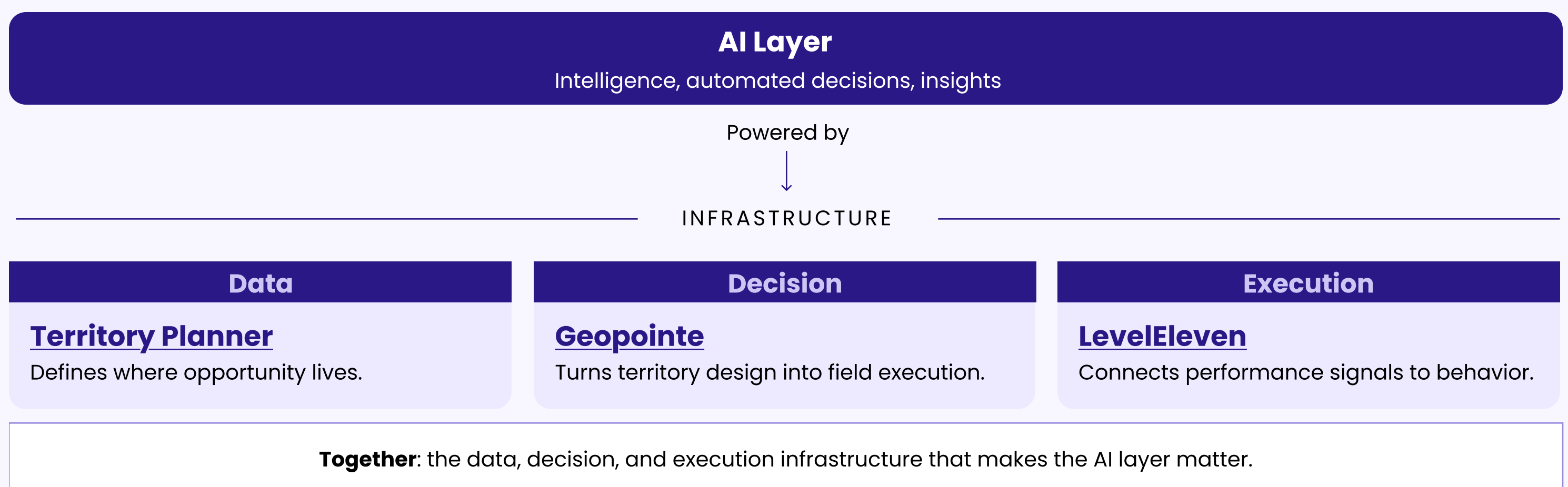
That looked like:



They did the unglamorous work first, and now they're pulling away.

And this gap—between one-dimensional technology investments and enterprise-wide AI-ready systems— is widening faster than most sales organizations realize, because infrastructure compounds.

The question worth sitting with is whether your organization is built to make your AI investments matter.



To be the team that wins, you need to build systems that make AI matter.

AI isn't your advantage. The system around it is.

[Build your AI-Ready Revenue System](#)

Get your working session today.