

2025

Revenue Execution Report

The Hidden Revenue Execution Crisis

How B2B SaaS Teams Are Losing Millions





Why Revenue Teams Are Struggling And Don't Know It

In high-growth revenue organizations, success is often measured by bold strategy, ambitious targets, and investment in cutting-edge tools. Yet beneath the surface, a quieter force is eroding performance: an **execution crisis in go-to-market operations**.

This crisis is not dramatic or loud. It doesn't announce itself with a dashboard failure or missed forecast. At least not immediately. Instead, it builds quietly, accumulating friction in handoffs, time lost to manual tasks, and data that disappears before it can be acted on. Revenue teams feel the impact in their daily work, but rarely diagnose it as a systemic breakdown.



Executive Summary:

The Hidden Revenue Execution Crisis

B2B SaaS companies are facing a critical execution crisis in their Revenue strategies, leading to significant revenue leakage and operational inefficiency.

The Hidden Cost of Revenue Execution Failure

These execution gaps lead to **millions in hidden revenue** losses for B2B SaaS teams through missed opportunities, inefficient processes, and incomplete customer data. For a mid-market SaaS company, this can represent 15–25% of potential annual revenue—effectively hiding in plain sight due to execution inefficiency.

83%

of customer data never make it into systems

Source: Gartner Research, "B2B Revenue Operations Benchmark 2025"

45%

of customer insights never make it into systems

Source: Forrester, "The State of B2B GTM Excellence, Q1 2025"

28%

of companies have integrated tech stack data

Source: Boston Consulting Group, "Revenue Operations Transformation"



The Anatomy of the Crisis

This hidden crisis reveals itself in three distinct and persistent symptoms:

- **Customer interactions don't become structured, usable data.** Valuable insights from sales calls, QBRs, support conversations, and demos remain buried in recordings, notes, or individual inboxes, unstructured and inaccessible to the broader org.
- **Cross-functional communication is broken or delayed.** Critical information gets trapped in functional silos. Teams like Sales, CS, Product, and RevOps operate with partial context, leading to missed signals and dropped responsibilities.
- **Execution relies on manual workflows that don't scale.** Reps and managers spend too much time on swivel-chair tasks—updating systems, summarizing meetings, manually coordinating follow-ups—introducing inconsistency and slowing momentum.

Each symptom independently reduces efficiency. Together, they form a **systemic execution failure** that directly impacts revenue: slower sales cycles, inaccurate forecasts, lower conversion rates, and even increased churn.



The Three Core Issues of the Revenue Execution Crisis



83%

of customer data never reach systems

creating information black holes and preventing teams from making data-driven decisions. Only 28% of companies have integrated tech stack data, leaving critical information stranded in silos.



45%

of sales rep time is wasted on non-revenue tasks

like manual CRM updates, note-taking, and administrative work. This significantly reduces selling time and creates inconsistent data quality across systems.



72%

of teams operate in functional silos

preventing effective cross-team collaboration. This results in missed opportunities, inconsistent customer experiences, and inability to proactively address issues before they impact revenue.

These three systemic issues drive the Revenue Execution Crisis, creating a gap between strategy and execution that costs B2B SaaS companies millions in lost revenue opportunity.

 Data Sources

Gartner Research 2025: "B2B Revenue Operations Benchmark"

Forrester: "The State of B2B GTM Excellence, Q1 2025"

Boston Consulting Group: "Revenue Operations Transformation"

Every customer conversation and interaction is a data event.

Every interaction with a prospect or customer is a goldmine of data

From discovery calls to support interactions, these moments contain critical signals about buyer intent, deal risk, feature needs, and expansion potential.

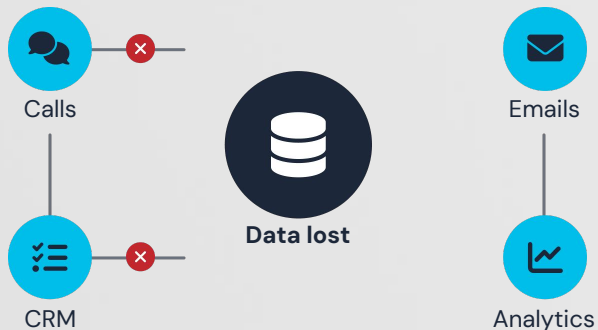
Yet most of that data and intelligence is lost, never structured, never shared, never used.

This is the first major symptom of the GTM execution crisis: **the failure to transform interactions into enterprise-ready data.**



Issue #1

Data Fragmentation & Poor Quality



28% of companies have integrated tech stack data

■ Boston Consulting Group, "Revenue Operations Transformation Report 2025"

Additional Data Sources

Forrester: "The State of B2B Revenue Excellence, Q1 2025"

McKinsey & Company: "Digital Transformation in Revenue Operations 2025"

⚠ Business impact

- ➔ **Missed Opportunities:** Crucial sales signals and customer feedback vanish before action can be taken.
- ➔ **Inaccurate Forecasting:** Without complete data, revenue predictions become unreliable guesswork.
- ➔ **Poor Decision-Making:** Teams make critical decisions based on incomplete or outdated information.
- ➔ **Revenue Leakage:** For a typical B2B SaaS company, this translates to 10-15% of potential revenue lost.

83% of customer insights never make it into systems

■ Gartner Research, "B2B Revenue Operations Benchmark 2025"

Even when data is captured,
it's not enough.

If insights remain locked in silos or fail to reach the right people in time, they might as well not exist.

This is the second major failure point in GTM execution:
communication of data or insights that's either broken or simply too slow to be useful and puts *administrative burden on humans to communicate*.

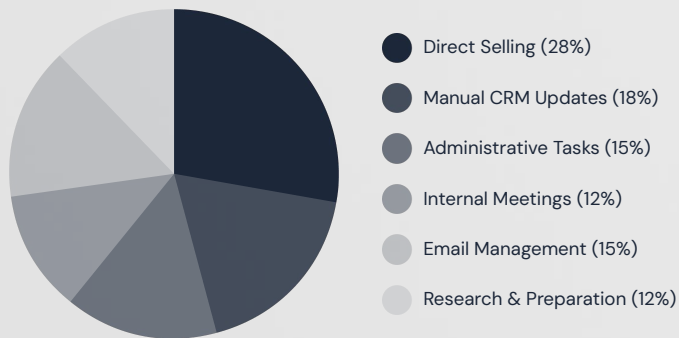
Execution in modern revenue teams isn't linear. It's collaborative, real-time, and cross-functional by design. Account executives, solutions engineers, customer success managers, product teams, and revenue leaders all share responsibility for moving a deal forward and delivering outcomes. But in too many organizations, vital information fails to travel across those seams.



Issue #2

Administrative Burden

45% of rep's time is wasted on non-revenue tasks



Data Sources

Gartner: "Sales Productivity in the Digital Era, 2025"

Forrester: "The State of B2B Revenue Operations, Q1 2025"

Boston Consulting Group: "Revenue Execution Benchmark, 2024"

⚠ Business impact

- ➔ **Reduced Selling Time:** Less time spent with customers means fewer deals and slower sales cycles.
- ➔ **Inconsistent Data Quality:** Manual updates lead to errors and incomplete CRM records.
- ➔ **Lower Productivity:** Higher-paid sales talent spending time on low-value administrative work.
- ➔ **Sales Burnout:** Administrative overload contributes to higher turnover rates in sales teams.

The hidden Revenue Cost

$$\begin{array}{ccccccc} \$120k & \times & 45\% & \times & 10 & = & \$540k \\ \text{Average AE} & & \text{Time on Admin} & & \text{Sales Reps} & & \text{Annual Cost} \\ \text{Compensation} & & \text{Tasks} & & & & \text{of Admin Work} \end{array}$$

Requiring Humans to be the data source and data entry machine IS the problem

GTM teams don't lose momentum (pun intended) because they lack strategy. They lose it in the grind: repetitive workflows, missed handoffs, manual updates, and follow-through that depends too heavily on memory or meetings.

This is the third and most operationally painful symptom of the execution crisis: **manual execution that slows you down, doesn't scale and affects your decision-making all caused by communication breakdowns.**

Execution becomes inconsistent, timelines drift, and rep capacity is artificially constrained, not by lack of talent, but by excessive administrative burden. The system depends on human follow-through for tasks that software should own.



Issue #3

Communication Breakdowns

72% of teams operate in functional silos, creating communication barriers

■ Boston Consulting Group, "Revenue Operations Transformation" (2025)



⚠ Business impact

- ➡ **Delayed Follow-Ups:** Critical customer issues and requests fall through the cracks between teams.
- ➡ **Conflicting Information:** Customers receive inconsistent messaging from different departments.
- ➡ **Lost Cross-Sell Opportunities:** Sales teams miss expansion opportunities identified by CS.
- ➡ **Product-Market Misalignment:** Product teams build features without real-time market feedback.
- ➡ **Revenue Impact:** B2B companies with siloed operations see 17-25% lower customer lifetime.

"In the average B2B organization, critical customer insights take 4-6 weeks to travel between departments—if they make it at all."

📌 Data Sources

Gartner CX Research (2025), "B2B Customer Experience Benchmark Study"
Forrester: "The State of B2B Revenue Excellence, Q1 2025"
McKinsey & Company: "Digital Transformation in Revenue Operations 2025"



Introducing Momentum: Enterprise Listening, Orchestrated

The Framework for Revenue Orchestration

Momentum is an AI-powered Revenue Orchestration platform that captures every customer interaction, transforms it into structured data, and drives real-time execution across your revenue systems. Unlike traditional point solutions, Momentum operates as an embedded task force, automating administrative tasks and surfacing critical insights without requiring rep intervention.



1st Party Structured Data Provider

Extract, structure, and move customer data automatically from every interaction to your key systems.

- ✓ **Auto-fill CRM fields** with conversation data.
- ✓ **Capture product feedback** and buyer sentiment.
- ✓ **Clean, complete data** for forecasts and dashboards.



Communication Velocity

Right signal, at the right time, to the right person that is clean, unbiased, and accurate.

- ✓ **Automatic deal rooms** spin up in Slack.
- ✓ **Risk summaries** for executives and sales leaders.
- ✓ **Cross-functional visibility** into customer needs.



Automation & Orchestration

Automate the process execution and move faster by streamlining workflows without requiring manual effort from your team.

- ✓ **Auto-move deal stages** when exit criteria is met.
- ✓ **Send follow-ups** for BDR handoffs.
- ✓ **Alert CS teams** on detected churn risks.



Momentum: Your Revenue Orchestration Platform





Momentum:

Your Revenue Orchestration Platform





1. Structured First-Party Data

Solving the data problem starts with rethinking how customer intelligence is captured and consumed.

Momentum addresses this through its first core pillar: **Structured 1st-Party Data**.

Here's how it works:

- **Deep Extraction, Not Just Transcription:** Momentum doesn't just log that a call occurred, it tags key statements like "budget discussed" or "CFO involved," linking them to CRM records automatically.
- **Semantic AI + CRM Context:** Using speaker attribution and CRM enrichment, Momentum understands that "John" on the call is the decision-maker at Acme Corp, not just a voice on a recording.
- **Traceable Insights:** Every insight is grounded in source material, whether it's a call snippet, email, or meeting, ensuring auditability and trust in data and metrics.
- **Frictionless for Reps:** Momentum works invisibly. No extra apps, no manual tagging. This zero-friction design ensures capture is complete and adoption is natural.

AEIOU Framework:

Internally, Momentum uses the AEIOU model to ensure no signal is left behind.

- **Aggregation:** Brings the full customer journey into view and able to be queried from any part of the organization.
- **Extraction:** Turns noise into patterns, sentiment, and signals.
- **Inputs:** Go beyond calls to include every touchpoint that matters and integrations
- **Outputs:** Drive actions and data across channels and systems, automatically.
- **Under-the-hood:** Momentum works without slowing teams down and does not require adoption.

By transforming fragmented conversations into clean, structured data, Momentum helps teams turn insight into a competitive asset. CRM stops being a graveyard of guesswork and becomes a living system of record: accurate, real-time, and ready for AI



2. Communication Velocity

The second pillar of Momentum's approach is built around **communication speed and reach**.

In other words, ensuring that the right signal hits the right person, in the right format, at exactly the right time.

Here's how Momentum makes that possible:

- **Contextual Alerts Where Teams Work:** Momentum plugs into Slack, Microsoft Teams, email, CRM, and support tools, so insights surface in the tools your teams already use.
- **Event-Driven Distribution:** A buying signal mentioned on a call can trigger a real-time Slack alert, a CRM field update, and a follow-up task, all orchestrated automatically.
- **Role-Based Communication:** Reps receive actionable nudges. Executives get high-level summaries. No information overload, just insight matched to each role's context.
- **Zero-Lag Execution:** Momentum listens in real time. No batch updates. No human bottlenecks. If a champion mentions CFO approval, the deal desk knows before the call ends.

Power of Communication Velocity

This is an organizational reflex. At Ramp, for example, reps receive post-call nudges in Slack with drafted follow-up emails.

At Alation, summaries route to leadership before an issue escalates.

At 1Password, cross-functional insight flows before the next sprint begins.

The result is frictionless collaboration: where every function has the context it needs to act confidently and quickly.

With the communication layer operationalized, GTM teams are aligned. Now, let's look at the third and final execution barrier: manual workflows that don't scale.



3. Automation & Orchestration

The third pillar of Momentum's platform is **Automation and Orchestration**

Designed to make GTM execution effortless, consistent, and scalable.

Here's how:

- **Trigger-Based Playbooks:** Define workflows like "If competitor mentioned → alert PMM + tag in CRM" or "If deal stalled → auto-draft revival email." Momentum executes instantly.
- **Prebuilt AI Agents:** Specialized AI Agents like Deal Execution and Customer Retention watch for conditions and carry out playbooks autonomously. They never forget, never fatigue, and always act on time.
- **Cross-System Execution:** Momentum doesn't just automate inside CRM—it routes insights between Gong, Slack, Salesforce, Zendesk, Notion, and more, creating one seamless GTM workflow.
- **Hands-Free Ops:** From follow-ups to reminders to executive updates, critical actions happen, whether or not a rep remembers to trigger them.

Orchestration

This is what scalable GTM execution looks like: reps focused on customers, managers focused on coaching, and operations focused on optimization, not micromanagement.

When you have all three, you begin to see the power behind different **types of signals**.

Deal Signals

Customer Signals

Risk Signals



Critical Revenue Execution Signals

Revenue execution success requires capturing, structuring, and acting on the right signals from every customer interaction. These signals provide critical insights that drive revenue growth and retention.

Data Sources

Gartner: "B2B Revenue Operations Benchmark 2025" and "Customer Insights Management Report" – Forrester: "The State of B2B Revenue Excellence, Q1 2025" and "Customer Success Signals" – Boston Consulting Group & McKinsey: "Revenue Operations Transformation" studies



Deal Signals

- ✓ **Pricing Discussions**
Budget thresholds, discount expectations, ROI requirements
- ✓ **Competitive Mentions**
Alternative solutions, competitive feature comparisons
- ✓ **Budget Timing**
Fiscal periods, approval cycles, implementation windows
- ✓ **Decision Process**
Key stakeholders, approval chain, evaluation criteria



Customer Signals

- ✓ **Product Feedback**
Pain points, enhancement requests, usability challenges
- ✓ **Feature Requests**
Specific needs, use cases, integration requirements
- ✓ **Sentiment Shifts**
Changes in enthusiasm, satisfaction ratings, vocal champions
- ✓ **Expansion Opportunities**
Growth indicators, cross-sell possibilities, new use cases



Risk Signals

- ✓ **Implementation Concerns**
Timeline issues, resource constraints, technical blockers
- ✓ **Stakeholder Changes**
Leadership transitions, champion departures, reorganizations
- ✓ **Competing Priorities**
Budget reallocations, strategic shifts, new initiatives
- ✓ **Usage Decline**
Adoption challenges, feature utilization drops, support escalations



Research Insights on Signal Importance

"Companies that effectively capture and act on deal signals can improve win rates by 23% and shorten sales cycles by up to 14 days on average."

 Gartner: B2B Revenue Operations Benchmark (2025)

"67% of customer churn could be prevented if businesses identified and addressed risk signals in the first 90 days after warning signs appear."

 Forrester: Customer Success Signals Report (2024)

"Organizations with structured approaches to capturing customer signals see a 34% higher product adoption rate and 28% greater expansion revenue."

 Boston Consulting Group: Revenue Operations Transformation (2024)

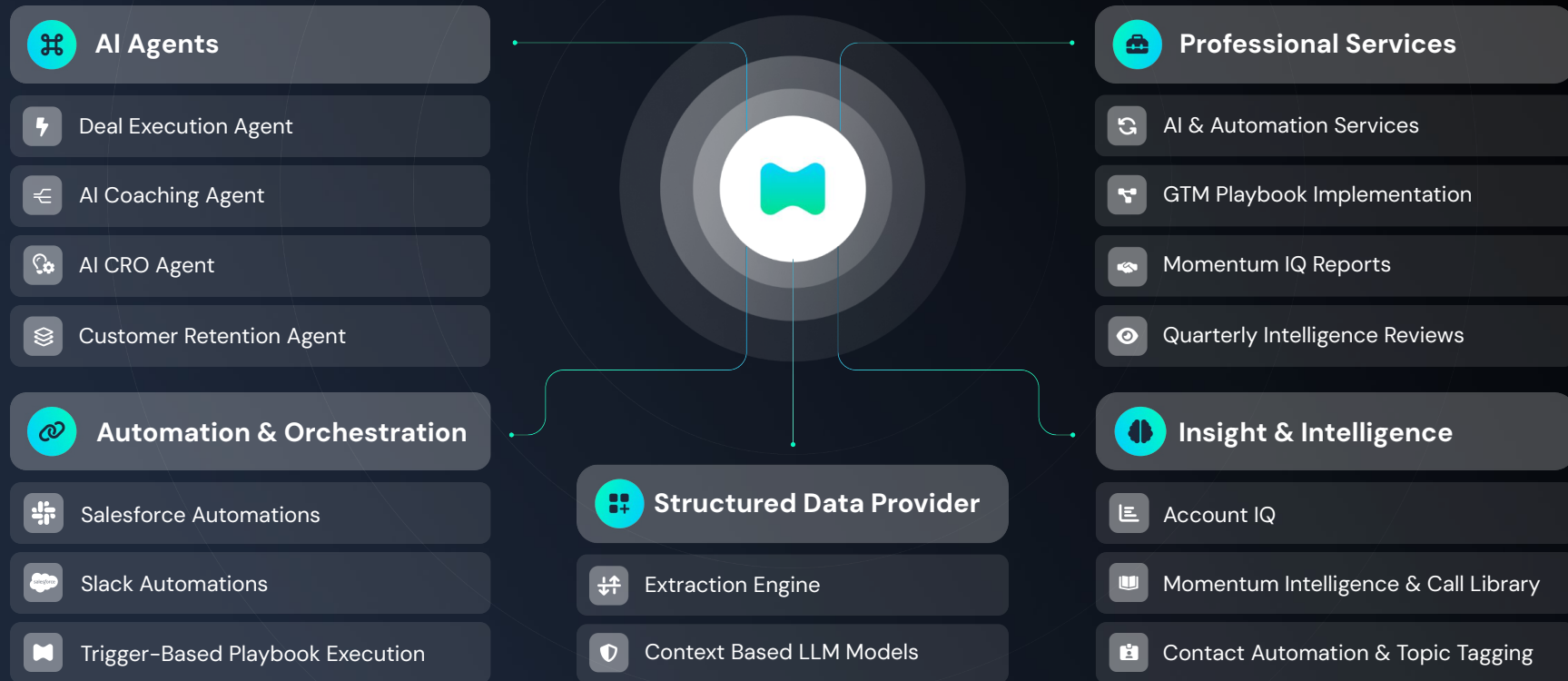
"The top-performing B2B companies now prioritize signal detection and automation over traditional CRM data management, yielding 3.8x higher revenue per employee."

 McKinsey: B2B Technology Revenue Excellence Report (2025)

**Momentum is a Revenue Orchestration
Platform with a suite of products to solve
this Hidden Crisis**



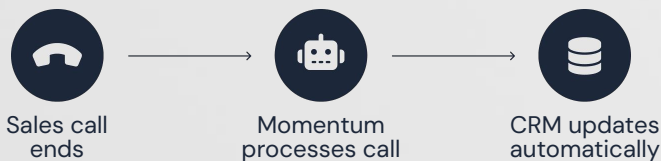
Your **AI Revenue** Execution Engine





Momentum's Deal Execution Agent

The Deal Execution Agent keeps your CRM clean, flags deal risks, and recommends next steps—eliminating administrative burden and allowing reps to focus exclusively on revenue-generating activities.



CRM Field Extraction on Autopilot

Automatically extract and update any field in Salesforce from conversation data, ensuring **100% data hygiene** without manual input.



AI Notes Saved Automatically to Salesforce

Transform conversations into structured, actionable notes saved directly to Salesforce—eliminating the **45% of time** reps spend on administrative tasks.

■ Forrester, "The State of B2B Revenue Excellence, Q1 2025"



Call Prep and Follow-up Assistance

Receive critical account details via Slack before calls and get **AI-crafted follow-up emails** to maintain momentum and ensure consistent execution.

With Momentum, progressing deals is faster and more streamlined. Our team has clarity and spends more time selling. Using Momentum has cut the time in half for sellers to progress their deals in Salesforce.



Nate Follen
Head of Revenue Systems
ramp ↗

ROI Impact

3-10

Hours Saved
Per Rep Weekly

100%

CRM Data
Accuracy

15%

Faster Sales
Cycles

For a team of 10 AEs with an average comp of \$120K, this translates to **\$250,000+** in annual productivity recapture.

■ McKinsey & Company, "Digital Transformation in Revenue Operations 2025"



Momentum's Customer Retention Agent

The Customer Retention Agent detects early churn signals, analyzes sentiment, and captures product feedback from customer conversations—enabling teams to act proactively before issues escalate to churn.



Churn Risk Detection

Automatically identify at-risk accounts **4–6 weeks earlier** than traditional methods by detecting subtle signals in customer conversations.



Automatic Case Creation

Create Salesforce cases without manual effort, ensuring **100% of customer issues** are tracked and resolved in a timely manner.



Sentiment Analysis

Track customer sentiment over time to **proactively identify** relationship changes before they impact renewal decisions.

Momentum flags risks in real time, enabling us to save critical accounts effortlessly. We use Momentum on a daily and hourly basis. Every call is recorded and analyzed to pull information out that drives our business forward.



Mark Turner
VP of RevOps
Demandbase

ROI Impact

23%

Reduction in
Customer Churn

4–6

Weeks Earlier
Risk Detection

18%

Increase in
Expansion Revenue

For a company with \$10M ARR, a 23% reduction in churn represents **\$575,000+** in preserved annual recurring revenue.

Gartner, "Customer Retention Report 2025" – Forrester, "SaaS Churn Prevention 2025" – Boston Consulting Group.

Momentum's AI CRO Agent

The AI CRO Agent delivers comprehensive executive insights, analyzing accounts, reps, and pipeline performance to help leadership make data-driven decisions without manual effort.

Executive Pipeline Overview

\$4.2M total pipeline value **67%** pipeline forecast accuracy **+18%** win rate vs. previous quarter

84%

66%

Operational impact



Risk Detection

8 high-value deals flagged for strategic intervention.



Velocity Improvement

23% faster pipeline movement with AI-guided next steps.



Closed/Lost Analysis

Pattern detection in lost deals enabling proactive strategy adjustments.



Executive CRO Briefs

High-level AI-powered insights on pipeline performance, rep activity, and account health to accelerate decision making.



Ask Momentum

Instant access to AI-driven insights on deals, reps, and accounts through natural language queries.

"Momentum gives us an order of magnitude better data than we've ever had before. We're making decisions with clarity and speed that simply weren't possible before."



Kyle Norton

VP of RevOps, Owner ramp ↗

Momentum's AI Coaching Agent

Provide real-time feedback, identify skill gaps, and enhance performance with AI-driven coaching that helps your team continuously improve without manual intervention from managers.



Call Analysis and Feedback

AI-powered call scoring assesses rep conversations in real-time, highlighting strengths, identifying improvement areas, and providing actionable recommendations for skill development.



Team Performance Reports

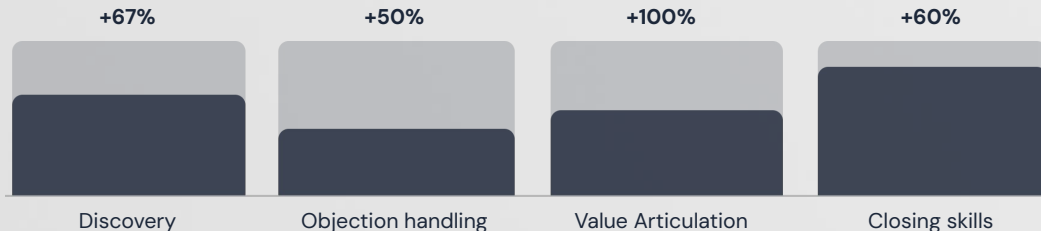
Generate comprehensive reports that identify patterns across your sales team, highlight best practices from top performers, and help managers focus coaching efforts where they'll have the greatest impact.



Competency Review

Track skill development over time with detailed competency scoring across key selling behaviors, enabling personalized coaching plans and trackable improvement metrics.

Competency Improvement over time



Research-backed Results

28% higher quota attainment with AI-enhanced sales coaching.

Gartner, "Sales Performance Research 2025"

32% reduction in ramp time for new reps using AI-driven coaching.

Forrester, "Sales Enablement Benchmark 2024"

46% increase in sales competency scores with automated coaching.

McKinsey & Company, "Revenue Operations Excellence 2025"

3.2x
more coaching
conversations

21%
Higher
win rates

94%
coaching
consistency

100%
call coverage

"It's like having a sales manager that works 24/7, providing insights we never thought possible. Our reps get immediate feedback, and our managers can focus on high impact coaching instead of call review."

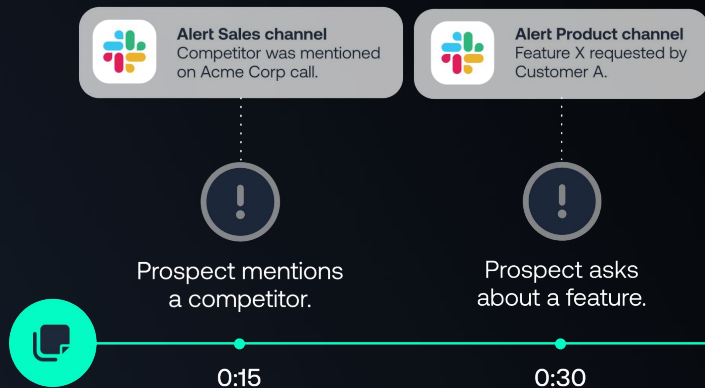


Steve Dinner
VP of RevOps
Owner



Powering Your Entire Revenue Team

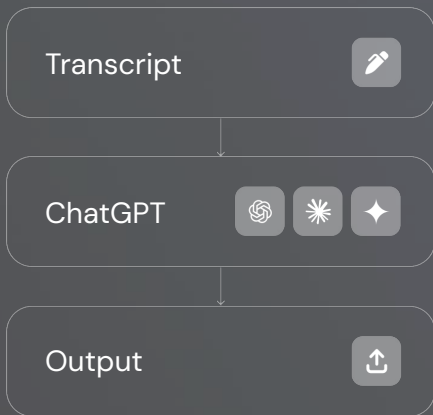
-  **BDRs**
Track discovery answers, route opps.
-  **AEs**
Flag risk, summarize deals, auto-update MEDDIC.
-  **CSMs**
Detect churn signals, log product issues.
-  **RevOps**
Extract data for dashboards, trigger workflows.
-  **Enablement**
Get call summaries, methodology adoption tracking, identify coaching moments.
-  **Execs**
Weekly AI briefs, real time Pipeline Visibility
-  **Marketing**
Buyer objections, ICP research, pitch and message resonance.
-  **Product**
Real-time feature feedback and pain points from live conversations.
-  **Finance**
Gain visibility into deal health, forecast accuracy, and risk trends without relying on rep-entered data.



Basic AI vs. Momentum

Basic AI

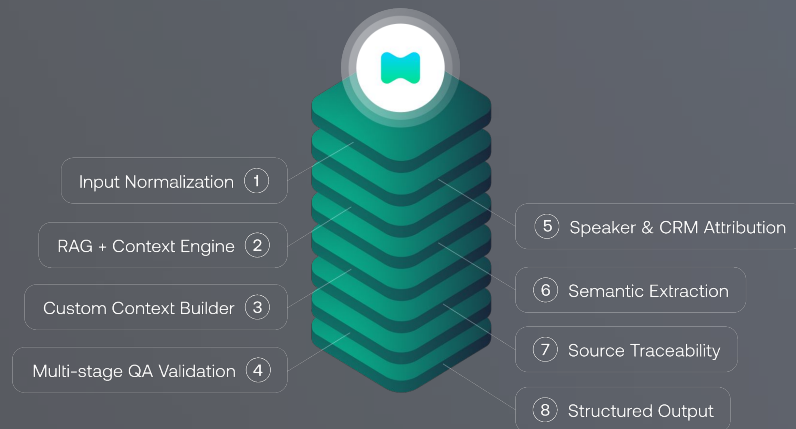
One-pass LLM call on raw transcript.
No speaker identification or CRM context.
No Salesforce metadata awareness.
No traceability or structure.



momentum

Momentum isn't a summarizer. It's a **GTM data refinery.**
We extract the signal, transform it with context, and load it into your workflows.

Extract → Structure → Accurate Entry



What Momentum Does

ETL Phase	Layer	Description
Extract	1. Input Normalization	Ingests and standardizes Zoom, Slack, emails, chat logs into unified schema.
	2. Speaker & CRM Attribution	Identifies speakers and maps them to Salesforce records.
Transform	3. RAG + Context Engine	Dynamically retrieves Salesforce + internal context to ground AI outputs.
	4. Extraction Engine	Tags and categorizes critical moments semantically.
	5. Custom Context Builder	Constructs task-specific context windows tailored to GTM workflows.
	6. Traceability & Source Anchoring	Every insight links back to original content (e.g., video snippet, email text)
Load	7. Multi-Stage QA & Validation	Applies sequential logic, heuristics, and feedback loops to ensure data.
	8. Structured Output Delivery	Pushes results into CRM, Slack, coaching workflows, and deal summaries.

The Power of First-Party Data

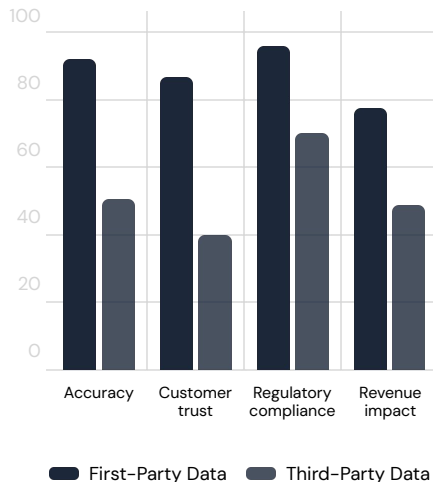
First-party data is information collected directly from your customers and prospects through owned channels and interactions. In revenue execution, this includes call recordings, emails, CRM inputs, support tickets, and product usage patterns.

🚀 How Momentum Leverages First-Party Data

Momentum transforms unstructured customer interactions into actionable first-party data, creating a foundation for AI-driven execution that drives predictable revenue growth.

- ✓ **Automated Data Extraction**
Captures critical information from calls, emails, and meetings without manual input.
- ✓ **Structured Signal Detection**
Identifies key buying signals, risks, and opportunities in real-time.
- ✓ **Intelligent Orchestration**
Routes insights to the right systems and people at the right time.
- ✓ **Continuous Optimization**
Learns from outcomes to improve prediction accuracy and execution.

Business Impact:
First-Party vs. Third-Party Data



3.2x Higher conversion rates when using structured first-party data vs. third party data.

■ Gartner, "B2B Data Strategy Report" (2025)

78% Of B2B buyers prefer companies that leverage first-party data for personalization.

■ Forrester, "B2B Buyer Experience Study" (2024)

61% Of revenue leaders cite first-party data orchestration as their top technology priority.

■ Boston Consulting Group (2025)

42% Increase in customer lifetime value through effective first-party data usage.

■ McKinsey & Company, "B2B Revenue Growth" (2024)

■ Gartner: "B2B Data Strategy Report" and "2025 CMO Data Management Survey" Forrester: "The B2B Buyer Experience Study" and "Revenue Operations Benchmark" McKinsey & Company: "B2B Revenue Growth Analytics: First-Party Data Revolution"

Conversation Intelligence vs. Revenue Orchestration

Conversation Intelligence



Analysis Without Action

Records and analyzes calls but requires manual intervention to extract insights and take action.



Unstructured Data

Creates transcripts and basic summaries that remain siloed, requiring manual transfer to systems of record.



Single-Team Focus

Primarily serves sales teams with limited visibility or value for other revenue functions.



Basic AI Analysis

Provides general insights but lacks orchestration capabilities to turn them into automated workflows.

Revenue Orchestration



Automated Execution

Transforms conversations into structured data that triggers automated workflows and system updates.



Orchestrated Data

Creates structured, usable data that automatically updates CRM fields, Slack, Snowflake, and other systems.



Cross-Functional Value

Serves entire revenue team with specialized workflows for sales, marketing, CS, and executives.



AI Agents & Automation

Deploys purpose-built AI agents that autonomously update systems and drive next-best actions.

Conversation Intelligence vs. Revenue Orchestration

Capability	Conversation Intelligence	Revenue Orchestration (Momentum)
CRM Field Updates	⚠ Limited to basic fields or via manual selection.	✅ Automatic updates to any field or object in realtime.
Cross-Platform Updates	❌ No native cross-system orchestration.	✅ Updates Slack, Salesforce, Snowflake, and more simultaneously.
Automated Task Creation	⚠ Basic reminder suggestions.	✅ Contextual task creation with automatic assignees and due dates.
Workflow Automation	❌ No native workflow capabilities.	✅ End-to-end process automation based on conversation signals.

“

"The move from Conversation Intelligence to Revenue Orchestration platforms represents a fundamental shift from passive insights to active execution. Platforms like Momentum don't just capture what was said—they transform conversations into structured data that drives synchronized action across the entire revenue engine."

Q Forrester: "A New Supergroup For Revenue Technology Emerges" (2025)

■ Forrester Research, "Revenue Orchestration Platforms vs. Conversation Intelligence Tools" (2025)

Common Solutions That Fail to Solve the Revenue Execution Crisis



Legacy Tools

What They Do

Conversation intelligence platforms that record calls, transcribe meetings, and provide basic summaries without actionable outcomes.

Why They Fall Short

- ✗ Fail to structure data for system integration.
- ✗ No automation to drive action from insights.
- ✗ Create more admin burden through review requirements.

73%

of insights captured by legacy tools never translate into executed actions

Gartner Research, 2025



DIY Integrations

What They Do

Custom workflow automations built with Zapier, Make, or other integration platforms to connect revenue systems.

Why They Fall Short

- ✗ Fragile connections that break with system updates.
- ✗ Significant technical debt and maintenance costs.
- ✗ Security risks from broad access permissions.

58%

of DIY revenue automation projects fail within 6 months of implementation.

Forrester, 2024

Common Solutions That Fail to Solve the Revenue Execution Crisis



Manual Processes

What They Do

Rep-driven data entry, note-taking, and manual handoffs between teams relying on human execution.

Why They Fall Short

- ✗ Inconsistent execution across team members
- ✗ Extreme time burden on highvalue sales resources
- ✗ Data quality issues from human error and bias

45%

of sales rep time spent on non-revenue generating administrative tasks

Boston Consulting Group, 2024



Point Solutions

What They Do

Single-purpose tools that solve individual problems without addressing the entire revenue execution lifecycle.

Why They Fall Short

- ✗ Create more data silos and tool sprawl
- ✗ Limited visibility across customer journey
- ✗ Inconsistent user experiences and adoption

82%

of companies report their tech stack is too fragmented to effectively orchestrate revenue execution

McKinsey & Company, 2025

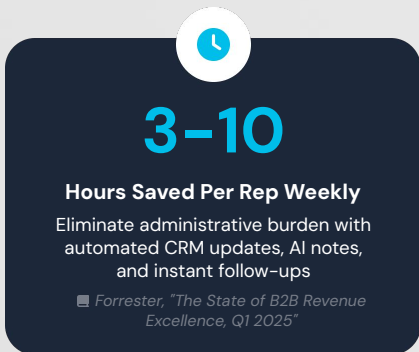
Why a Comprehensive Approach is Required

These approaches fail because they treat symptoms rather than addressing the root cause: **disconnected data, systems, and teams**. Revenue Orchestration Platforms like Momentum solve all three core issues by unifying data capture, automating administrative tasks, and creating seamless cross-functional visibility—transforming how revenue teams execute.

■ Gartner "B2B Revenue Operations" (2025), Forrester "Revenue Tech Stack" (2024), BCG & McKinsey Studies

ROI Impact: The Value of Revenue Execution & Orchestration

Implementing Momentum's Revenue Execution Orchestration platform delivers measurable business impact across three key dimensions:



Quantifying the ROI Impact

For a Mid-Market B2B SaaS Company

Annual Revenue: **\$10M**

Avg. AE Comp: **\$120K**

Productivity Value: **\$335,000**

Retention Value: **\$575,000**

Sales Team Size: **15 reps**

Gross Retention: **85%**

Revenue Impact: **\$2.1M**

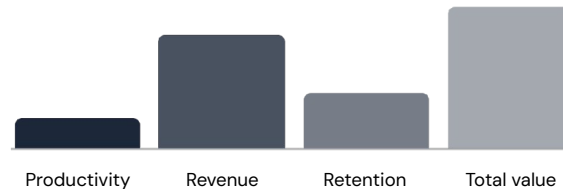
Total Annual Value: **\$3.01M**

■ Based on McKinsey & Company, "Digital Transformation in Revenue Operations 2025"

First year ROI



Momentum's Revenue Execution Orchestration platform delivers **\$3.01M in annual value** by addressing the three critical aspects of the Revenue Execution Crisis. For most mid-market B2B SaaS companies, this represents a **16.8x return** on their investment in the first year alone.



Customer Success Story: Ramp

Ramp is a finance automation platform helping thousands of businesses save time and money with corporate cards, expense management, bill payments, and accounting integrations.

Challenges before Momentum

- ✗ Sales reps spent **45% of their time** on manual CRM updates and administrative tasks.
- ✗ Critical customer insights from calls remained **trapped in silos** with no way to extract data.
- ✗ **Inconsistent deal progression** with varying Salesforce updating practices across the team.

Momentum implementation

- ✓ Deployed **Momentum's Deal Execution Agent** to automate CRM field updates and note-taking.
- ✓ Implemented **AI CRO Agent** to provide executive insights across the sales pipeline.
- ✓ Created automated Slack workflows for real-time deal visibility and cross-functional collaboration.

With Momentum, progressing deals is faster and more streamlined. Our team has clarity and spends more time selling. Using Momentum has cut the time in half for sellers to progress their deals in Salesforce.



Nate Follen
Head of Revenue Systems

Measurable business impact

50%

Reduction in Administrative Work

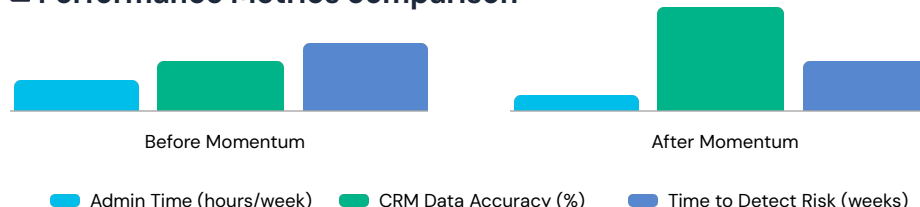
100%

of Calls Summarized to CRM

35%

Faster Sales Cycles

Performance Metrics comparison



Customer Success Story: Demandbase

Demandbase is the Smarter Revenue™ company for B2B brands. They help marketing and sales teams spot the most promising opportunities and close deals faster through their comprehensive, AI-driven account intelligence platform.

Challenges before Momentum

- ✗ **Delayed risk identification** in customer accounts leading to preventable churn.
- ✗ Analysts spent **hours manually curating data** from customer calls and interactions.
- ✗ **Lack of unified visibility** across customer accounts and interaction data.

Momentum implementation

- ✓ Deployed **Customer Retention Agent** to detect early risk signals in real-time.
- ✓ Implemented **AI CRO Agent** to deliver executive insights on pipeline health.
- ✓ Created automated workflows to route critical customer insights to the right teams instantly.

Momentum flags risks in real time, enabling us to save critical accounts effortlessly. We use Momentum on a daily and hourly basis. Every call is recorded and analyzed to pull information out that drives our business forward.



Mark Turner
VP of RevOps

Measurable business impact

4-6

Weeks Earlier Risk Detection

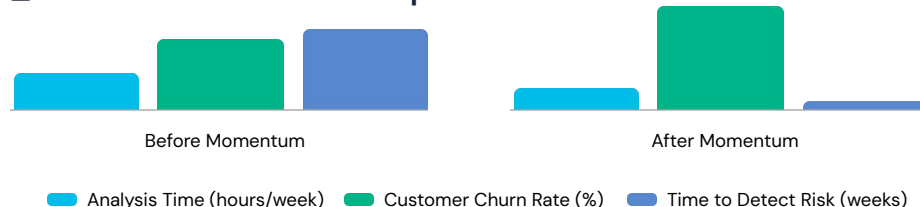
29%

Reduction in Customer Churn

85%

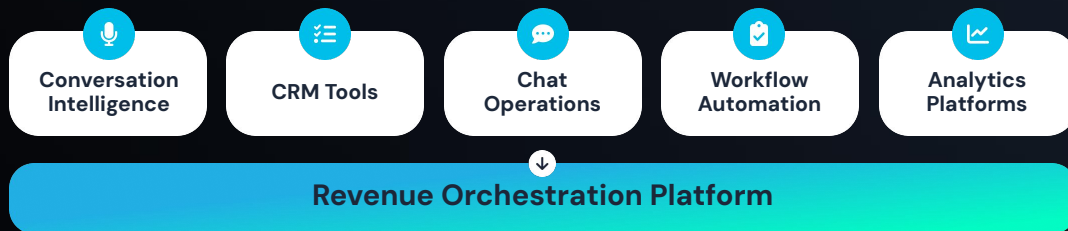
Less Time Spent on Analysis

Performance Metrics comparison

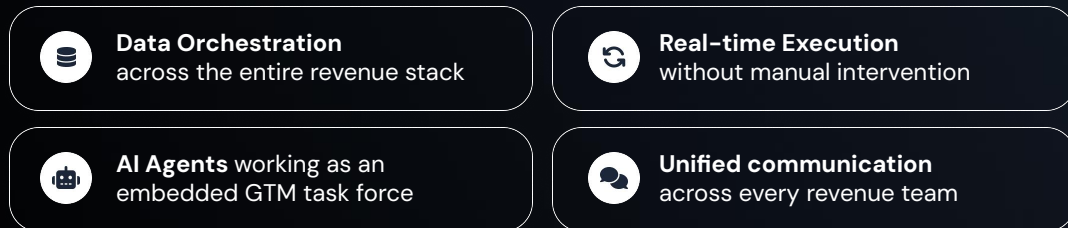


Revenue Orchestration: The New Tech Supergroup

Revenue Orchestration Platforms are emerging as a new category of technology that coordinates and optimizes the entire revenue process. These platforms unify previously siloed tools for sales, marketing, and customer success into a cohesive ecosystem that drives consistent execution.



Momentum as a Revenue Orchestration Leader



“

"Revenue Orchestration Platforms represent a fundamental shift from point solutions to integrated execution engines. They're not just connecting tools—they're creating a new operating model that turns customer interactions into structured, actionable data across the entire revenue lifecycle."

■ Forrester Research, 2025

“

"The most significant change in revenue tech is not just AI integration, but the emergence of platforms that transform unstructured interactions into structured workflows. Revenue Orchestration Platforms like Momentum exemplify this new supergroup—where conversation intelligence meets automation at scale."

■ Forrester: "A New Supergroup For Revenue Technology" (2025)

📄 **Data Sources**

Forrester Research: "A New Supergroup For Revenue Technology Emerges: Revenue Orchestration Platforms" (2025)

Transform your Revenue Execution today



Save 3-10 hours

Per rep weekly with
automated data entry and
admin tasks



Increase Win Rates

By 15-27% through better
data and execution



Reduce Churn

By 23% with early risk
detection and proactive
intervention

[Book an AI Transformation Session Today](#)

