

Momentum.io Research:

# The great disconnect & bifurcation

## Market hype vs Operational reality

A Comparative Analysis of Analyst Sentiment vs. Buyer Behavior (H1 & H2 2025)  
Data Sources: McKinsey, Deloitte, OpenAI, PwC vs. VOM Proprietary Opportunity  
Dataset (2,000+ Sales opportunities)



This analysis is based on 2000+ active B2B technology opportunities captured through Momentum's proprietary AI Revenue Data Orchestration technology, which can be customized to analyze any angle or data point found in customer conversations. The dataset spans 150 industries, all company sizes ranging from 10 to 10,000+ employees, in pipeline from January through December (H1 first half and H2 second half) of 2025. (*No customer data was used in this analysis*). We have done this to show what kind of data anyone using the Momentum technology can use as a result of using the new **Deep Research and Autopilot Batch** products. The design has been changed for marketing purposes in this report.

# Introduction

In this report we used the data to extract and analyzes pain points, stakeholder dynamics, sentiment analysis, and maturity indicators from real conversations between revenue leaders and the Momentum team discussing AI, AI agents, data orchestration, and automation solutions. Unlike traditional survey-based research that captures aspirational responses, our methodology analyzes actual pain articulations from live sales discovery calls, providing ground-truth data about what truly drives buying decisions and the pains that buyers are feeling in the market current state.

**Momentum is a leading AI Revenue Data Orchestration technology. We extract data from customer calls, clean and validate it, and send it into systems of record for analysis such as this report.**



Editorial Intelligence

# Survey Sentiment vs. Sales Reality

Why the data tells two different stories



## Methodology: **The Survey**

- **Sources:** McKinsey, Deloitte, OpenAI, PWC pwc
- **Input:** Interviews with Executives & IT Leaders
- **Measures:** Intent & Aspiration
- **Question Asked:** "What do you WANT to do?"
- **Result:** Optimism Bias



## Methodology: **Real Conversations**

- **Sources:** VOM Momentum Analysis
- **Input:** ~2,000 Real-World Sales Opportunities (H1 & H2 2025)
- **Measures:** Pain Points, Blockers, & Budget
- **Question Asked:** "What is BROKEN right now?"
- **Result:** Operational Friction

**CRITICAL FINDING:** In H1, 92.4% of companies were too busy with manual process failure to even mention "AI" in their pain points.



# Survey Methodology

2000+ sales conversations

Company Size	%	Industry Segment	%
1000+	33.23%	IT Services	22.32%
501-1000	16.35%	Security Software	13.28%
251-500	17.73%	Analytics & BI	6.91%
101-250	16.88%	Digital Marketing	3.93%
1-100	15.82%	Fintech	18.60%
Titles	%	Software Development	29.22%
C-Suite	35.15%	Cloud Computing	2.34%
VP	20.18%	Customer Management	2.02%
Director	5.22%	Sales Enablement	1.38%
Manager	4.76%		
Head/Lead	21.41%		
Executive	13.28%		



## How we analyzed the data

We analyzed 2,000+ discovery calls using Momentum's AI platform. Not surveys, but actual buyer conversations where people tell you what's really broken.

We tracked:

- 47 distinct pain points that kept showing up
- When buyers shifted from "we're exploring AI" to "our CRM is a disaster and we need help now"
- Which problems correlated with deals that actually closed

The insight: when a VP of Sales says "our CRM is a mess" in discovery, that's not a throwaway comment. It showed up in 41.3% of calls. That's operational reality, not the aspirational story they'd tell a survey.

We cross-validated everything against deal outcomes. If a pain point didn't correlate with closed business, we filtered it out.



# Two Parallel Realities Defined 2025

## The Analyst View (External)

- ➔ Adoption Rate: **78% – 88%**
- ➔ Theme: **The Agentic Pivot**
- ➔ Narrative: **Seamless transformation with rapid ROI (\$3.70 per dollar). The "Flywheel Effect" is in motion.**

Source citations: McKinsey, Aloa, Fullview

## The Ground Truth (Voice of the Market)

- ➔ Operational Rate: **7.6% (H1) rising to ~24% (H2)**
- ➔ Theme: **The Digital Reckoning**
- ➔ Reality: **The "Maturity Trap." 64.4% of companies are stuck in the Emerging tier. Operational maturity is rare.**

Source citation: VOM Opportunity Dataset (2000+ conversations only prospect conversations, no customer conversations were used in this analysis)



## What Changed

In H1, 92.4% of buyers couldn't articulate AI as a need. They were drowning in manual processes and didn't have the bandwidth to think beyond survival mode.

By H2, something shifted. Enterprises with structured RevOps teams started systematizing their AI approach. They moved from "interesting idea" to "we need this to hit our number."

But here's the split: companies with clean operations accelerated. Companies with messy CRMs hit a wall. The gap between survey responses (78% say they use AI) and operational reality (24% actually have it working) is the story.

The tolerance for AI pilots is over. If you can't show forecast accuracy improvement or rep efficiency gains, budgets will dry up in 2026.

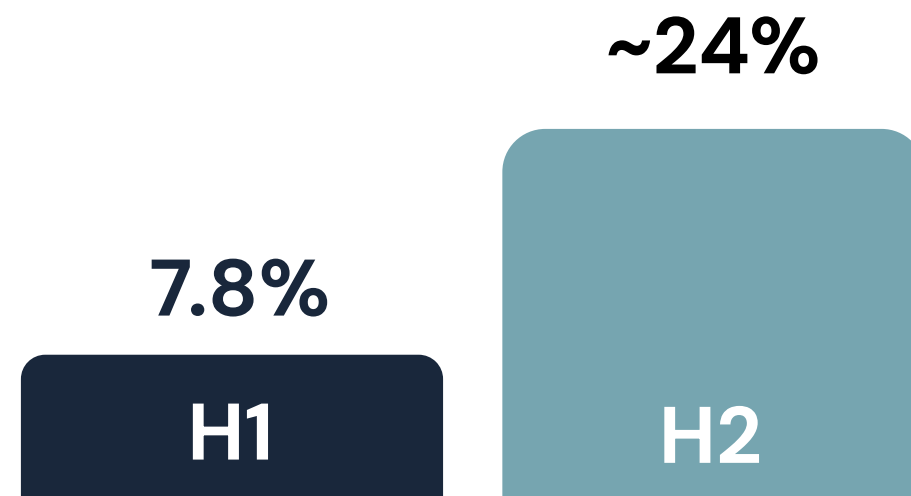


Executive Summary

# Survey Sentiment vs. Sales Reality

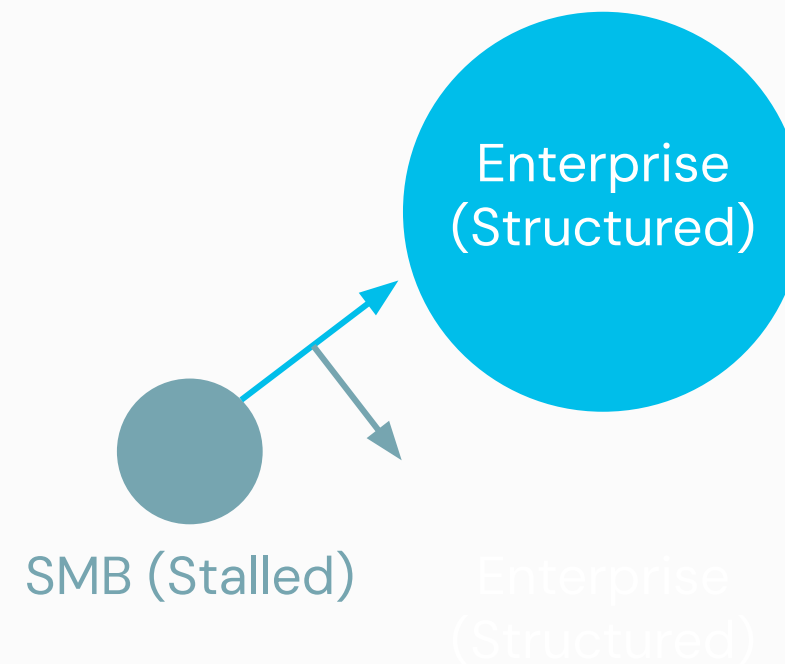
Why the data tells two different stories

## Adoption is Real but Fragile



AI embedded in workflows has jumped 3x, but the majority of the market remains stuck in pilot purgatory.

## The market has Bifurcated



Enterprise organizations have pulled ahead with 15–20% stronger maturity signals; SMBs have hit the "ChatGPT Ceiling".

## Infrastructure is the Bottleneck

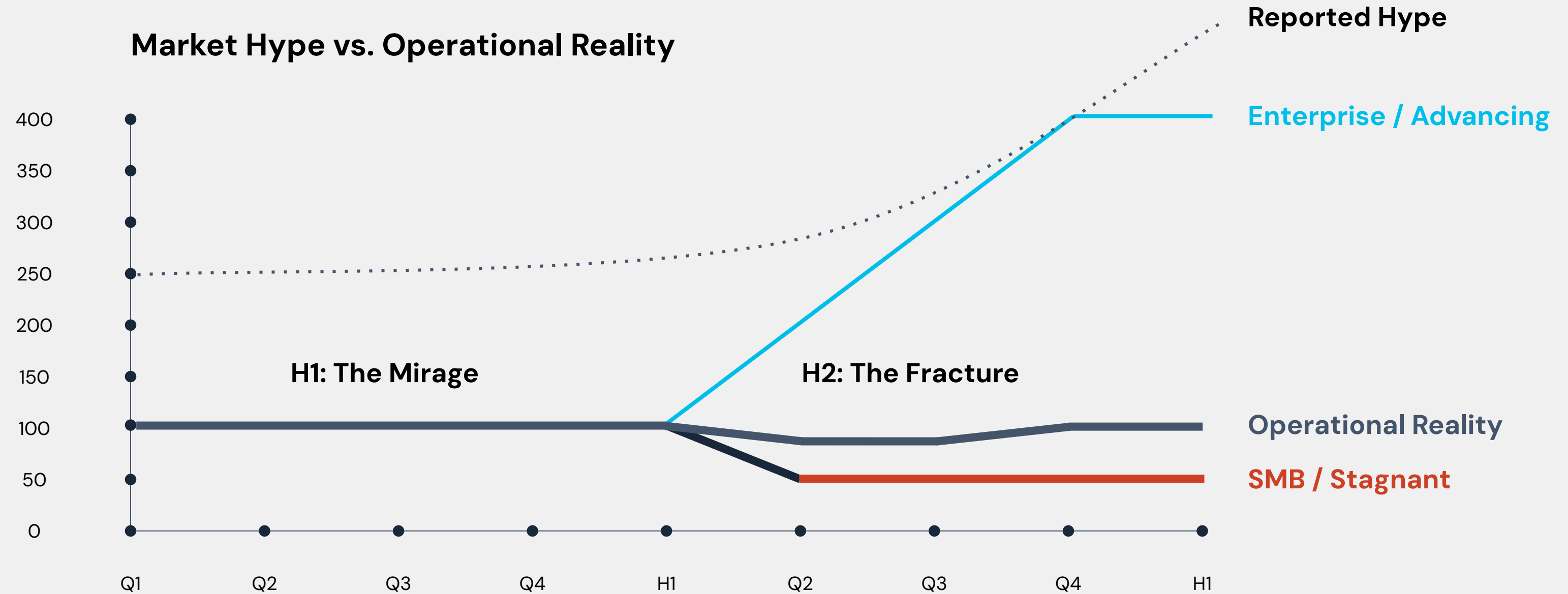
**41%**  
3.4 tools / Pain point

Tool sprawl and CRM dysfunction are the primary blockers to ROI. You cannot build AI on broken plumbing.



# The Great B2B Technology Reality Gap

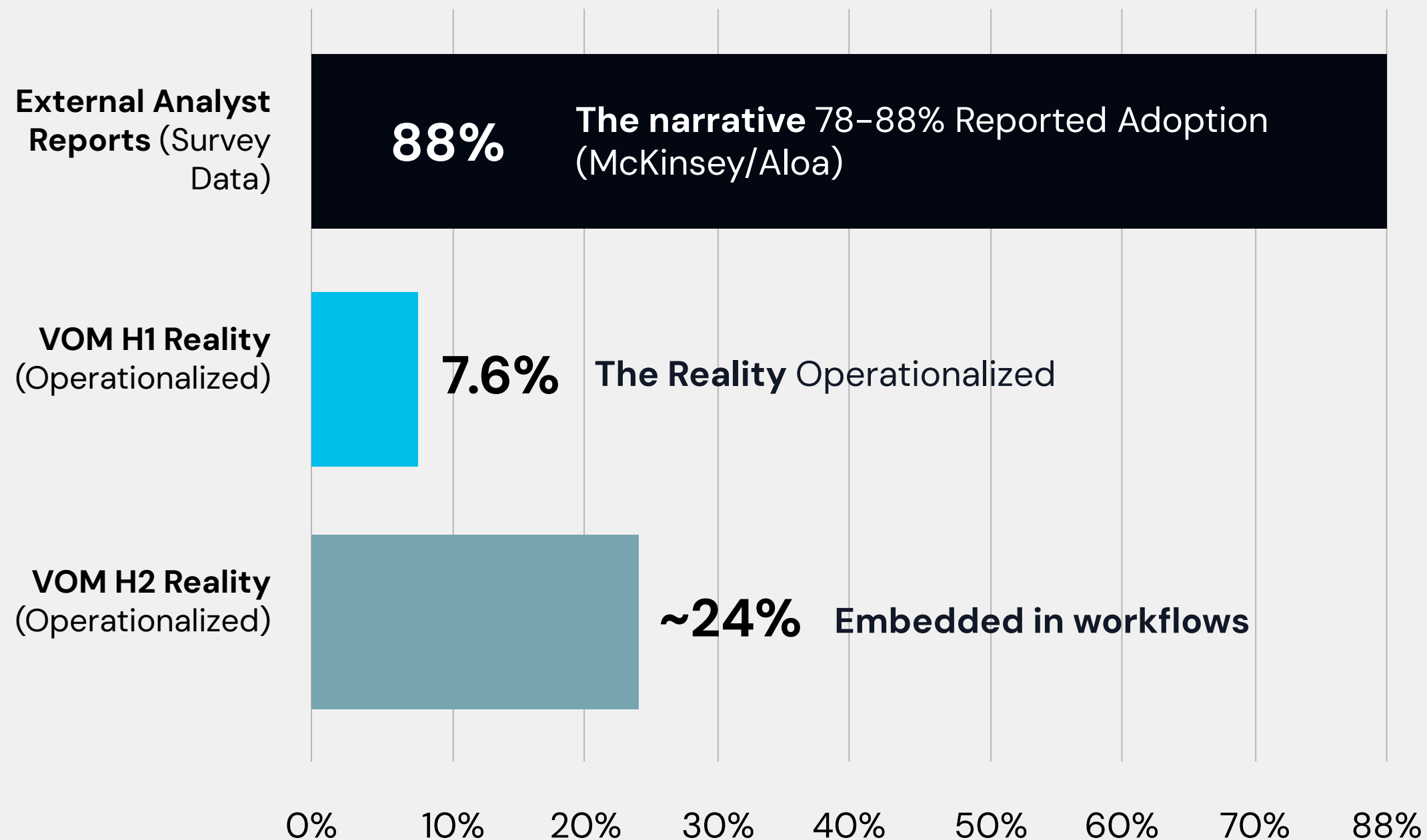
An Analysis of 2,012 Sales Opportunities: From the H1 "Maturity Mirage" to the H2 Market Bifurcation and 2026 Outlook.



Based on ground-truth of 1,860 H1 opportunities and 943 H2 opportunities representing \$15.7 H+ in active Pipeline



# The Adoption Mirage: Usage Does Not Equal Transformation



## Insight: The Definition Gap

The market confuses "Chatting with GPT" with "Systematized Workflows".

## External View:

"Widespread conviction that AI represents fundamental change" (Fullview).

## Ground Truth:

in H2 over 75% of companies still describe AI only as basic usage (ChatGPT/Copilot), not a systemized layer.



## 3 Levels of AI Adoption

The 10x gap (88% survey response vs. ~24% operational reality) isn't confusion—it's three different definitions:

Level 1: Individual Tool Use (63% of organizations in H1, 51% in H2)

Your reps use ChatGPT to write emails. Nothing syncs to your CRM. No measurable business impact.

Level 2: Department Experiments (29% in H1, 25% in H2)

Marketing bought a content tool. Sales has an email generator. None of them talk to each other. Data lives in 4 places. This is where tool sprawl happens.

Level 3: Actual Infrastructure (7.6% in H1, ~24% in H2)

AI is embedded in your revenue workflow. It writes to your CRM automatically. You can measure forecast accuracy improvement. Your CFO trusts the data.

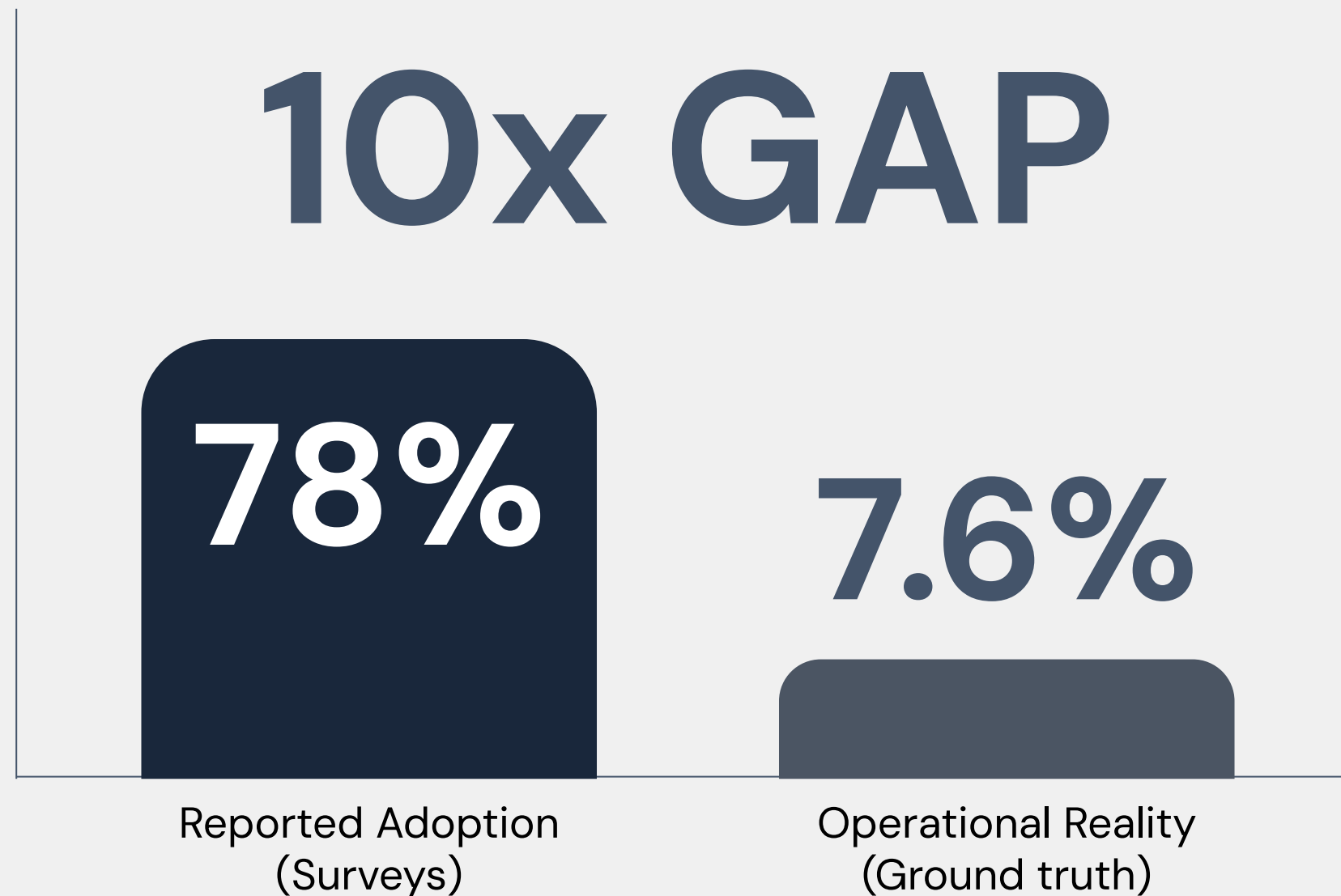
When analysts ask "Do you use AI?", they count all three levels. When you ask "Is AI actually helping us hit our number?", you're only measuring Level 3.

This is why 88% claim adoption while 92.4% still have massive manual process problems.



# H1 2025 : The Shocking Truth — AI Adoption was 90% Fiction

Executive Summary & Core findings



In H1, the market suffered from "Universal We're Behind Syndrome." Everyone felt behind, but statistically, everyone was stuck at the same starting line.

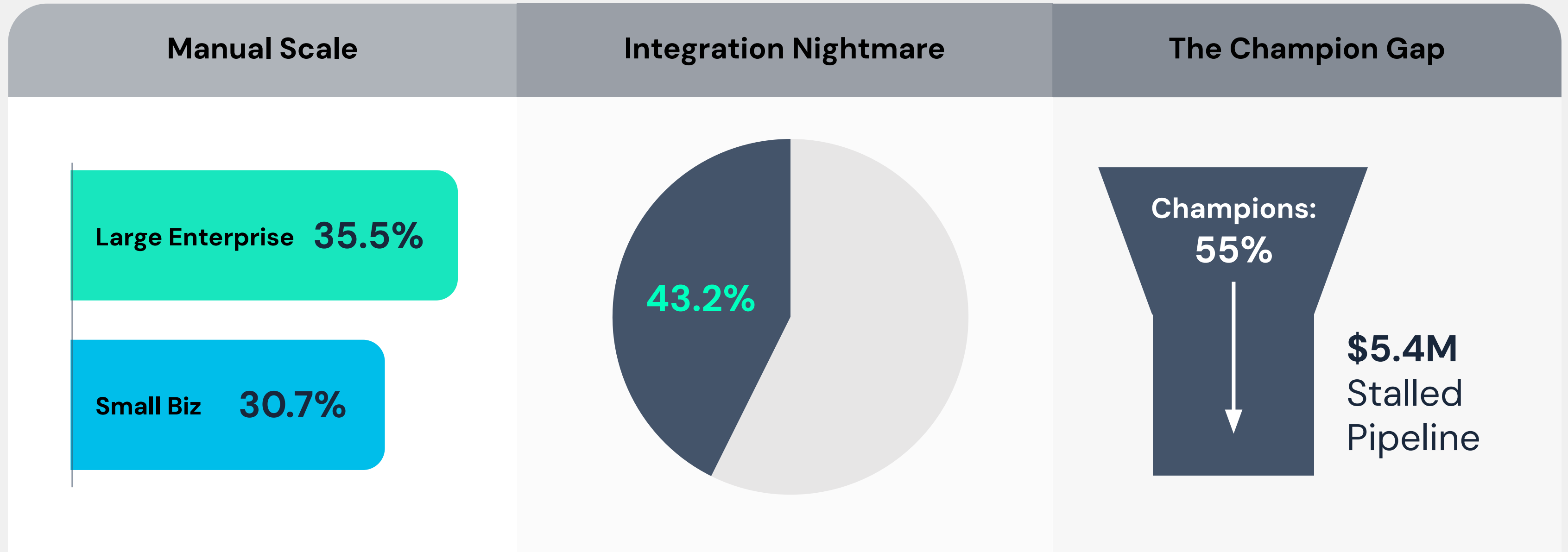
- **7.6%** of orgs mentioned AI in actual operational pain.
- **31.1%** relied on manual processes for core functions.
- **64.4%** trapped in "Emerging" status
- Maturity Score: **60-61/100** (Identical across all company sizes)

Operational Maturity vs. 90% Reported Hype. Universal struggle regardless of company size. The "We are behind" syndrome was actually a "We are all stuck" reality.



# The Manual Process Trap defined H1

Scale amplified complexity, it did not solve it.



Large enterprises had MORE manual pain than small businesses.

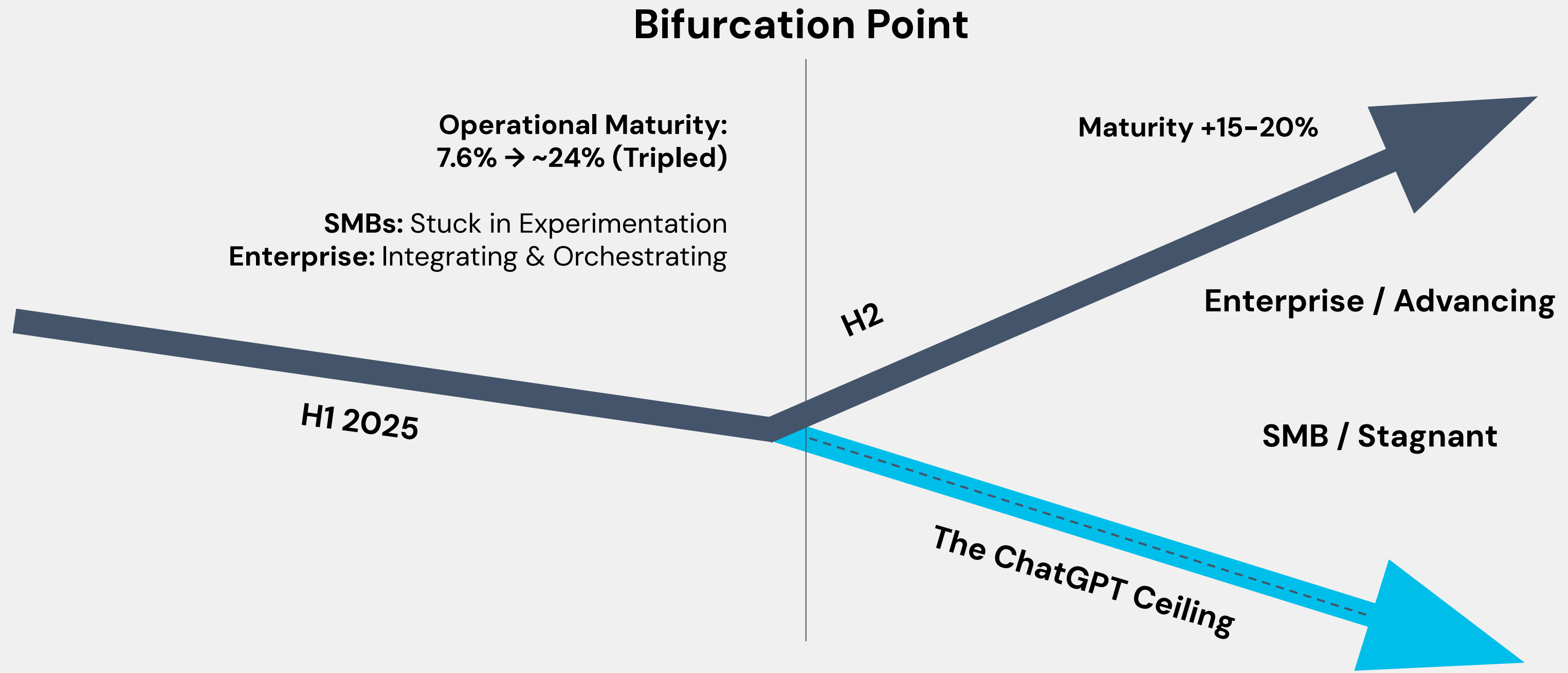
43.2% of compound pains involved integration failures.

Economic Buyers: 39%



# H2 2025: The Signal emerges and the Market Fractures

In H2, the floor didn't move, but the ceiling rose. A specific segment began to operationalize.





# H1 vs. H2: From curiosity to Early Implementation

In H1, the market was "trying" AI. In H2, the market began "integrating" AI.

**Embedded in Workflows**  
Inter (Slate Grey)

7.6%

▲ ~ 24%

The shift from trying to integrating.

**AI in Pain Language**  
Inter (Slate Grey)

7.6%

▲ ~ 24%

Buyers citing AI as a solution to specific pain points.

**Passive Usage (ChatGPT/Copilot)**  
Inter (Slate Grey)

63%

▼ 51%

Unintegrated usage is declining as formalized workflows take over.



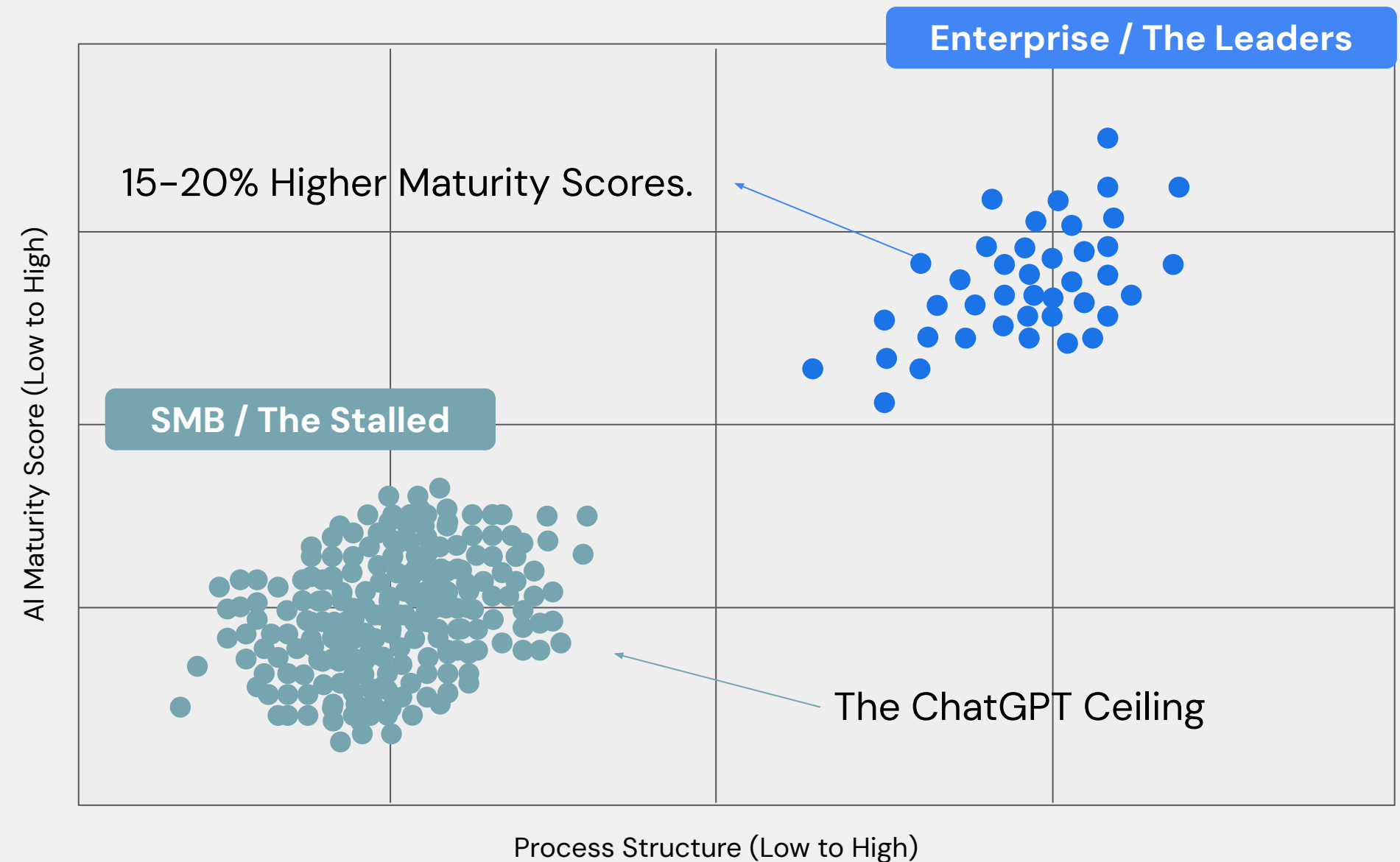
# Maturity is No Longer About Intent. It's About Structure

## Enterprise Characteristics

- 10x greater presence of executive champions.
- Structured next steps.
- 31% using explicit implementation language.

## SMB Characteristics

- Language remains exploratory.
- Lacking RevOps orchestration.
- 71% of generic "AI/ML" titles (no budget).



Enterprise teams are transitioning from idea to execution.  
SMBs are stuck navigating AI without clear operational levers.



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# H1 2025: The Plateau of Mediocrity

**Lagging (31.1%)**  
Relied on manual processes.

**The Maturity Trap (64.4%)**  
Clustered in the Emerging Tier.  
Suspended in perpetual  
transition.

**Advancing (<5%)**

## The Reality of H1:

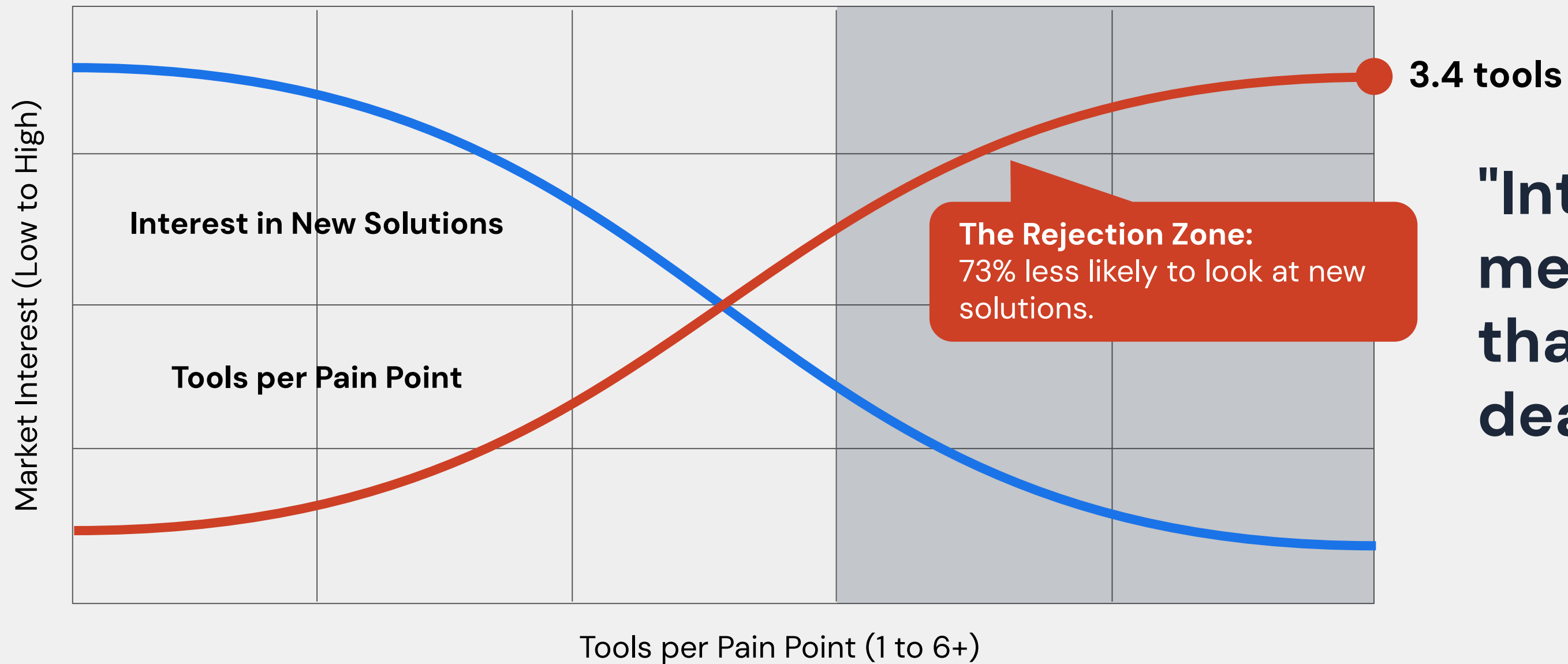
**94.4%** of organizations described their state in static terms, seeking incremental improvement rather than the "transformation" promised by analysts.  
**Insight:** The market wasn't moving forward; it was stuck between manual chaos and automated promise.



# The Stack is Saturated

Tool fatigue has turned into rejection.

### Market Saturation & Tool Fatigue



**"Integration" is mentioned more than "AI" in 57% of deals.**



## Decisions to Make

You need to answer one question: Can your current infrastructure support AI that actually works?

If your CRM data is clean and your tools integrate:

Look for AI solutions that automate workflows, not just provide insights. Require native CRM sync. Demand to see forecast accuracy metrics from their existing customers, not case studies, actual performance data.

If your CRM is a mess and you have 4+ disconnected tools:

Stop buying new solutions. You're adding chaos to chaos. Fix your data orchestration first by consolidating tools, validate data, automate capture. Get to Level 3 before you add another intelligence layer.

The reality: Once you hit 4 tools, buyers mentally shift from "evaluate new vendors" to "consolidate this disaster." Integration capability now beats AI features 57% of the time in vendor selection.



# H2 2025: The Market Splits Apart

The 'Universal Struggle' of H1 fractured into two distinct paths.

## H1: the Universal Struggle



Maturity is no longer about intent; it is about infrastructure. Enterprise firms are building systems; SMBs are just buying licenses.



### Path A: The Enterprise

- 15–20% Higher Maturity Scores
- 10x Greater Executive Champion Presence
- Focus: Integration & Infrastructure

### Path B: SMB / Mid-Market

- The 'ChatGPT Ceiling'
- Stuck in Experimentation
- Fragmented Tech Stacks
- No path to orchestration



# The Barrier Isn't "Trust" – It's Broken Data



## Analyst Narrative (Deloitte/IBM)

- "Trust"
- "Hallucinations"
- "Workforce Readiness"
- "AI Ethics"

"77% of businesses express concern about AI hallucinations." (Fullview)



## VOM Ground Truth

- CRM Failure (41%)
- Data Dysfunction (69.9%)

"Our data isn't broken—it's misleading."

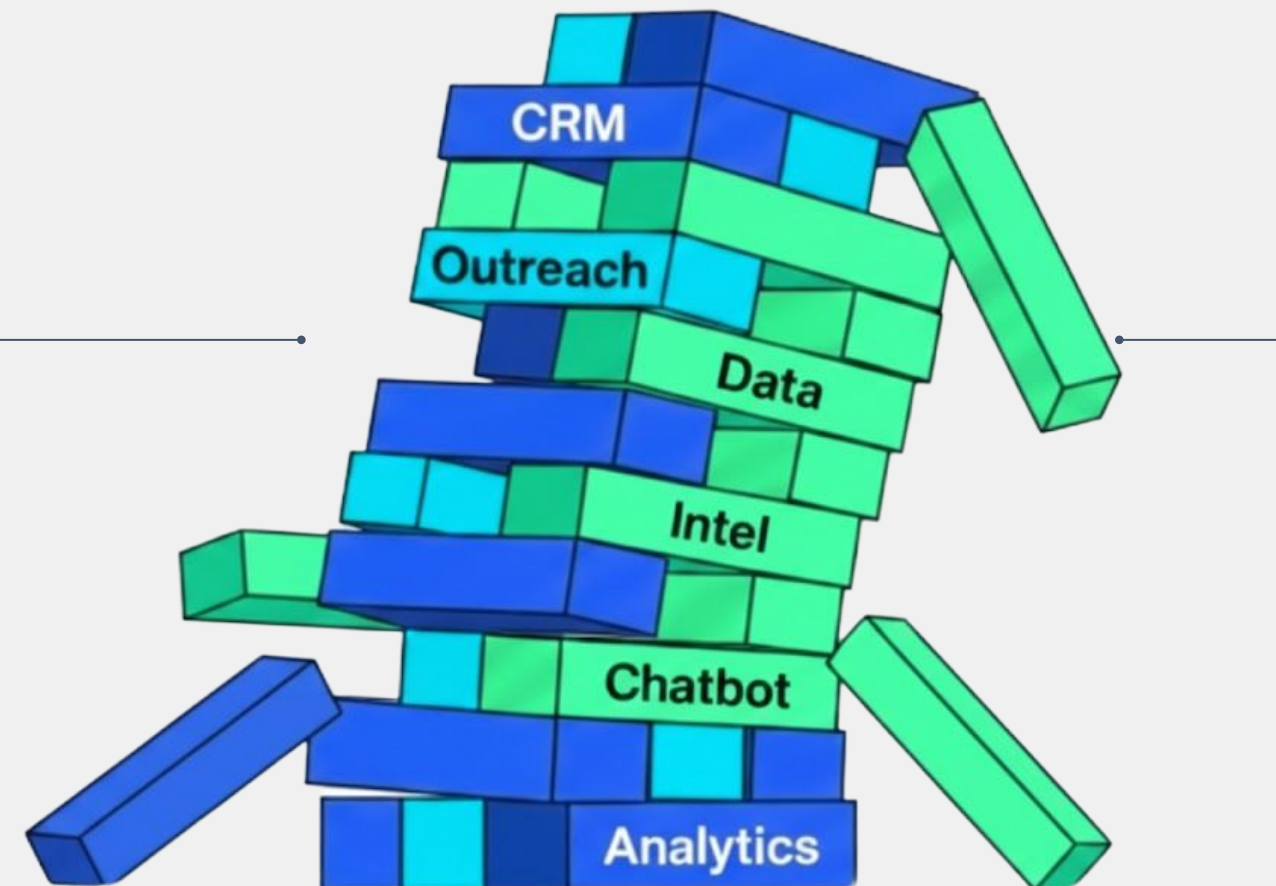


**Insight:** You cannot build AI agents on top of broken CV files. The barrier is technical debt, not AI ethics



# Drowning in Point Solutions

Tech Stack Tower



## Tool Sprawl Trend:

Rose from 3.2 to 3.4 tools per pain point (H1 to H2).

## The Fatigue Factor:

Companies with 4+ tools are 73% LESS likely to buy new solutions.

'Integration' was mentioned more frequently than 'AI' in **57% of mid-market opportunities.**



The GTM stack is saturated. The opportunity is no longer adding value—it's consolidating it.



# The 'Agentic' Pivot vs. The Operational Ceiling

The Promise

# 2025

The Year of the Agent (IBM/Deloitte).  
Autonomous workflows transforming work.

The Reality

# 75%

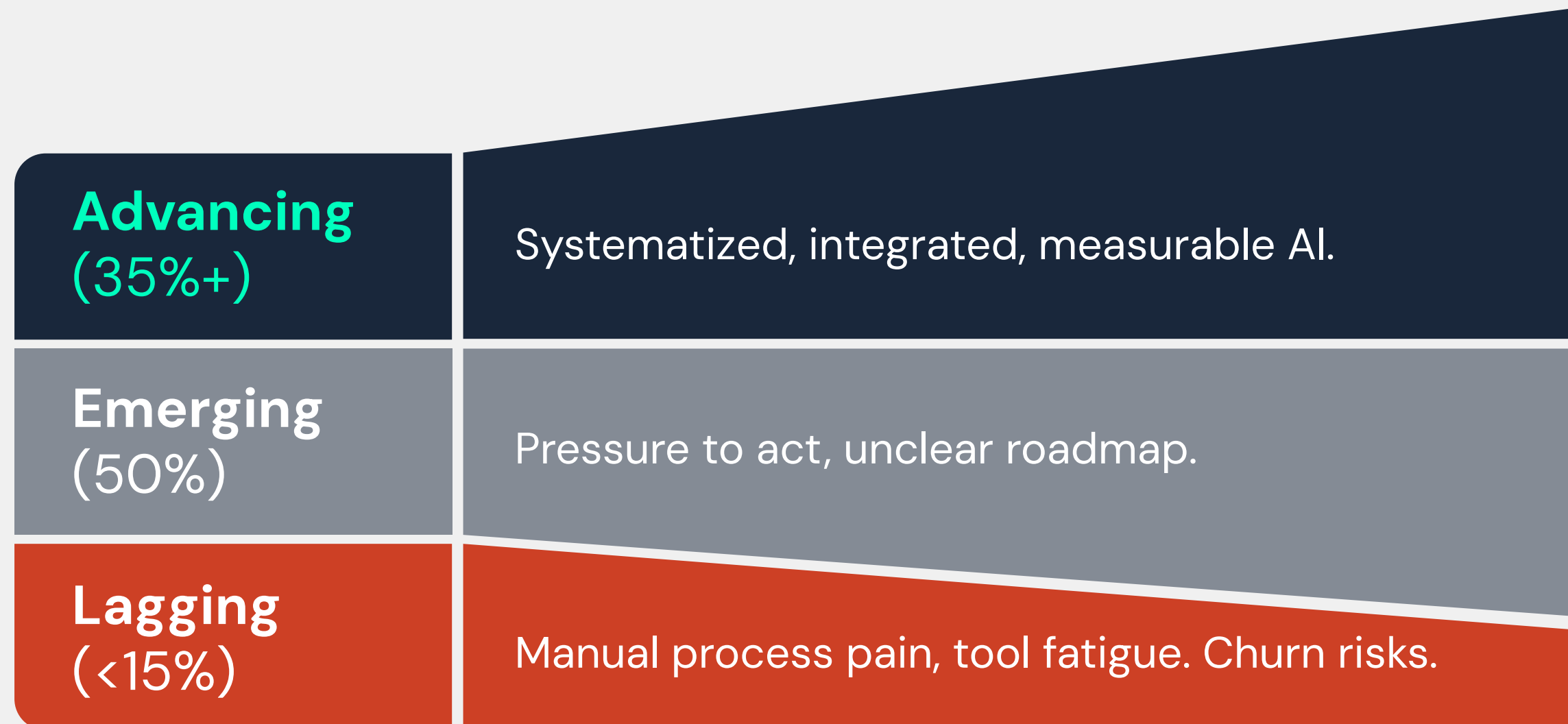
Of companies still describe AI as basic usage  
(Copilot/ChatGPT)

VOM

True 'Agentic' workflows require system interoperability that most companies simply do not possess yet.



# The New Competitive Divide (2026 Projection)

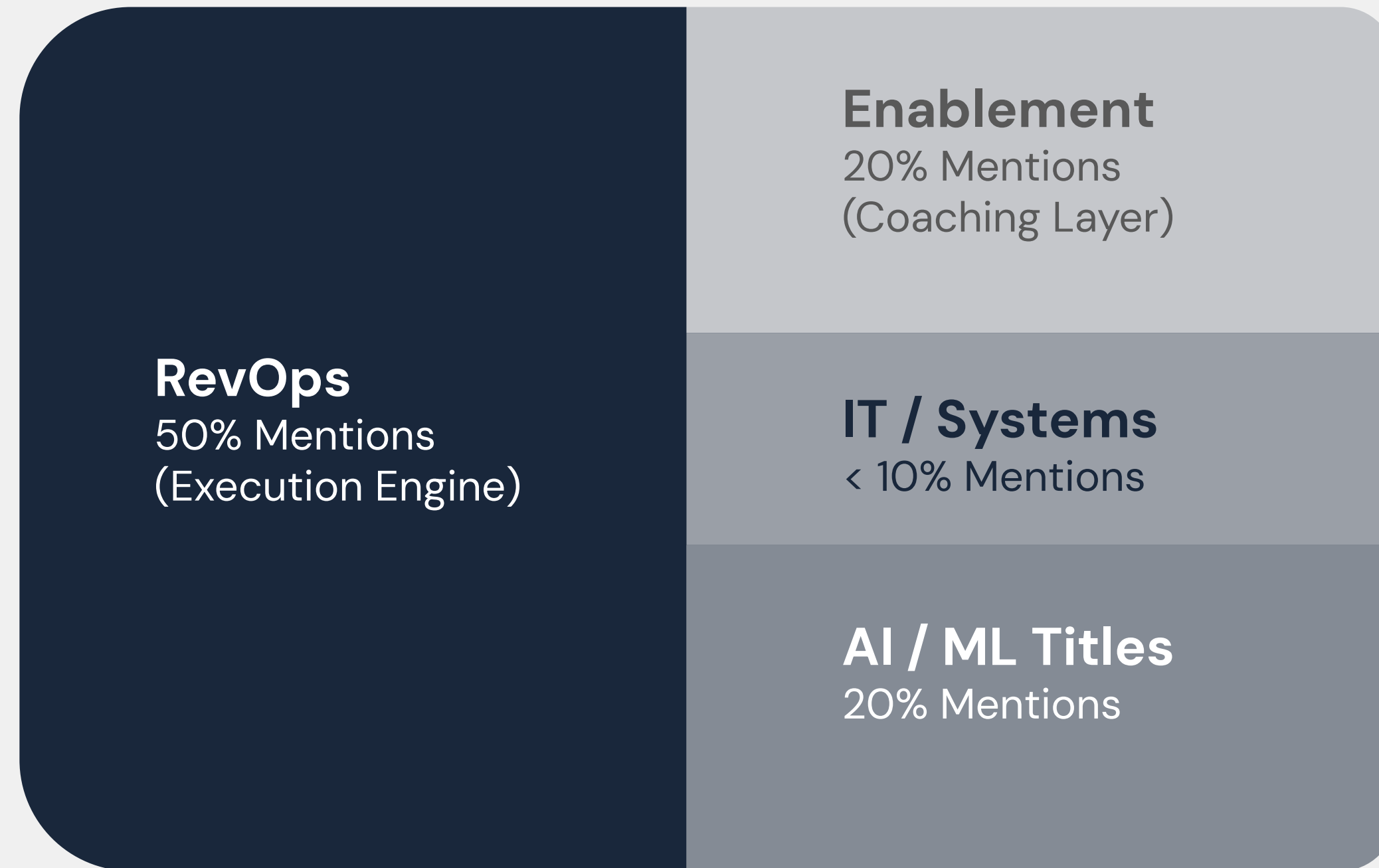


## Winning Traits of Advancing Orgs

- System thinking
- Architecture over acceleration
- Proof over aspiration



# Who Owns the Transformation? RevOps is the Gatekeeper



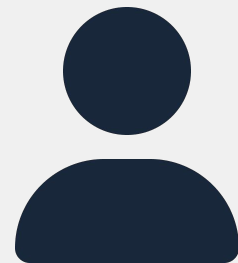
AI adoption is being driven by commercial functions, not IT. RevOps owns the workflow, the data, and the integration making them the primary architect.

AI specific titles has increased since H1 2025.



# The Shift from "Innovation Theater" to "Infrastructure Budget"

H1 2025



## Innovation Champion

Broad interest, shallow execution.  
Pilot-focused.

H2 2025



RevOps Champion      CFO / CRO  
(Budget)

Infrastructure - Focused.  
Execution

## Winning Combination

Deals with this combination  
are **2.8X MORE LIKELY**  
to close

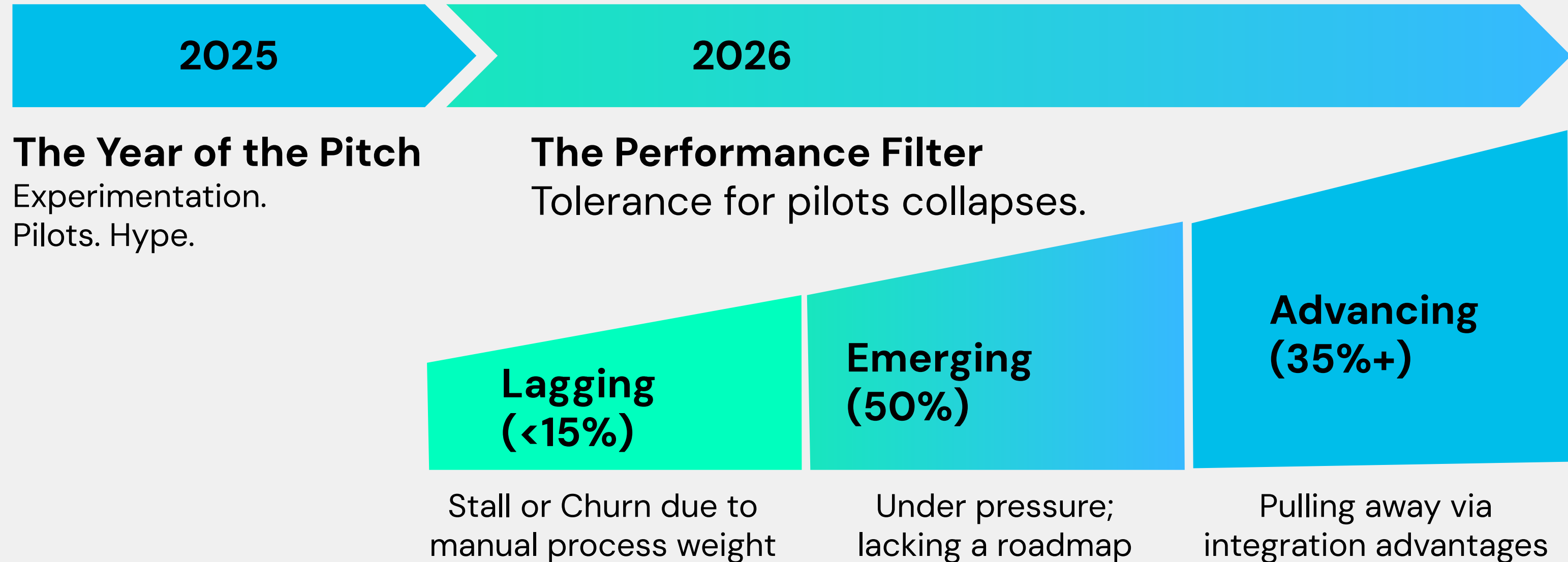
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Single-threaded champions struggle to drive urgency.  
AI is now core infrastructure requiring budget-holder sign-off.



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# 2026 Outlook: **Accountability Replaces Aspiration**



By 2026, organizations without demonstrable performance impact will see their funding and support rapidly evaporate. The market will demand evidence, not promises.



# Strategic Implication: **Stop Buying Tools; Start Building Systems**

Tool Buying



System Thinking



## **Prioritize Integration**

If it doesn't talk to your CRM, don't buy it. Integration is the new innovation.

## **Fix the Data Layer**

Address the 41% CRM failure rate before layering on Agents. You cannot automate chaos.

## **Beware the Maturity Trap**

Do not layer AI on top of manual process failure.



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# Strategic Implication: The Era of Point Solutions is Over

### Advice for vendors



#### Value Prop Shift:

Integration is now a more powerful value prop than AI.



#### The Resistance Factor:

If you require the buyer to rewire their stack, you will lose **(73% rejection rate for complex stacks)**.



#### The Gatekeeper:

Align with RevOps. They are the new guardians of the infrastructure budget.



#### Ecosystem Nodes:

Winners will function as nodes in an ecosystem, not islands.



VOM

- Shift from 'Feature-based' to 'Integration-based' value proposition is the new reality. AI is a feature; integration is the product.
- High rejection rate (73%) for solutions requiring complex stack re-architecting. The market is demanding seamless, low-friction adoption.
- RevOps is now the primary decision-maker for budget allocation, prioritizing solutions that demonstrate measurable efficiency and immediate value in the ecosystem.

You can't AI your way out of a CRM  
you've ignored for years. Fix the  
plumbing or waste the budget.

**Intelligence built on bad data isn't intelligence. It's just expensive noise with a  
dashboard**



Map every tool in your stack to a specific outcome. Instead of "adoption rate" use actual pipeline impact. If a tool doesn't improve forecast accuracy, rep efficiency, or conversion rates, it's on the chopping block.

Survey your reps: do they trust the data in your CRM? If fewer than 70% say yes, you have a foundational problem. Don't buy AI solutions until you fix it.

Make RevOps the gatekeeper for all new tools. No exceptions. If they can't explain the integration plan and data flow, the vendor doesn't get a meeting.

### ***For RevOps Leaders:***

Use this diagnostic:

**Data quality:** Less than 10% CRM error rate, automated capture from customer interactions

**Integration:** Fewer than 2 tools per workflow, bi-directional CRM sync for everything

**Executive alignment:** Your CFO and CRO jointly own AI ROI targets

### **Budget allocation for 2026:**

60% on data orchestration (the plumbing), 40% on AI intelligence. Not the other way around.

If you don't have clean pipes, adding intelligence just gives you faster garbage.



# 2026 Trend 1 – **Accountability Replaces Aspiration**

**The Era of Experiments is Over.**

- **The Prediction:** RevOps and CFOs will demand clear ROI pre-purchase

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- **The Shift:** Tolerance for "pilot programs" will collapse.

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- **The Metric:** Success = Forecast Accuracy & Rep Efficiency (Not "Content Creation").



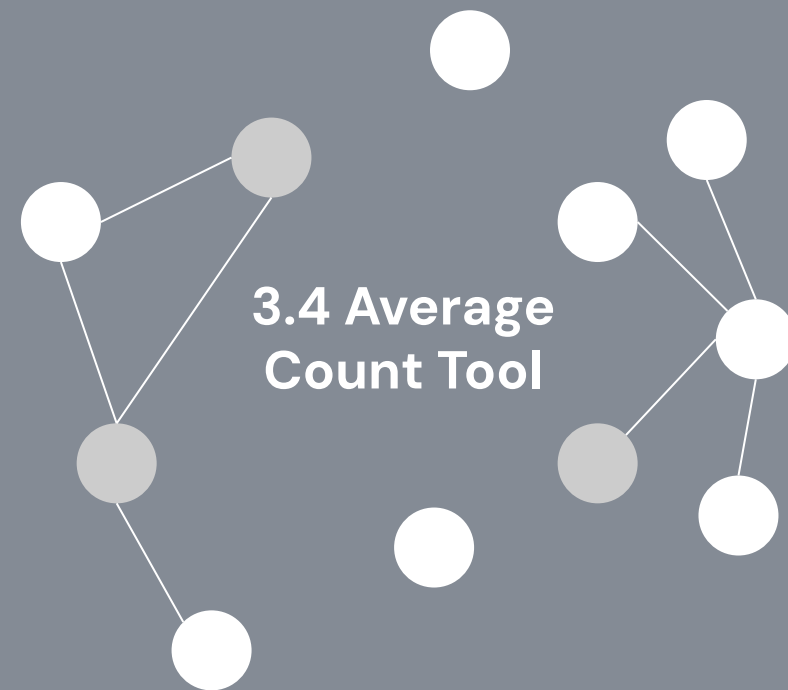
**Insight:** The era of unaccountable tech spending is over; the new mandate is clear:  
Prove Value or Perish



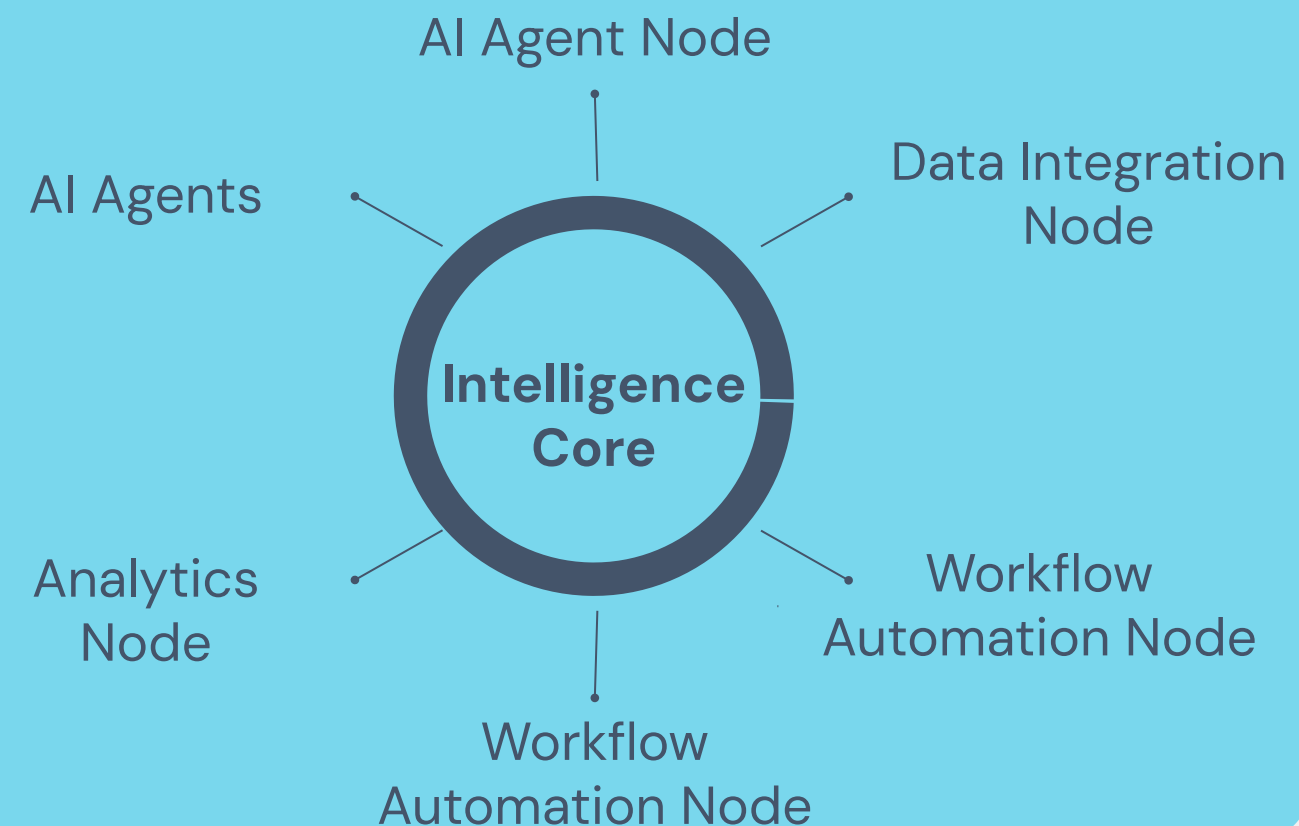
# 2026 Trend 2 – Infrastructure as the Battlefield

## Consolidation or Death

### 2025: Point Solutions



### 2026: Ecosystem Nodes



**The Great Consolidation:**  
Buyers will cut point solutions that don't integrate

**Operational Leverage:**  
AI bought as "Nodes", not apps.

**Hierarchy:**  
Integration > Intelligence

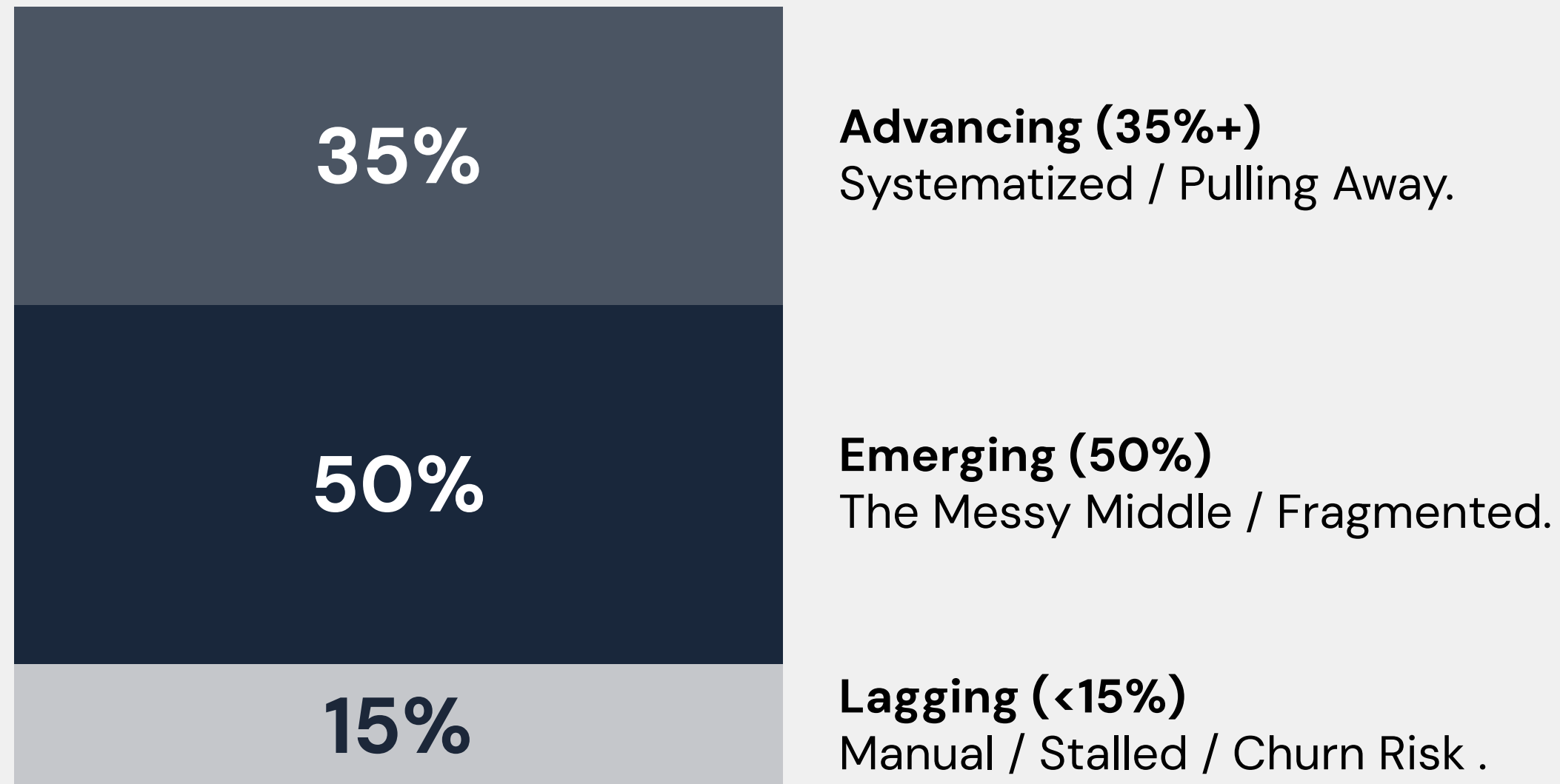


**Insight:** The battleground has shifted from feature sets to foundational infrastructure; fragmentation is the new failure mode



# 2026 Trend 3 – The Survival Gap

The Maturity Gap Becomes a Performance Chasm



**Warning:**  
Companies without clean data and integration will stall regardless count.

**VOM** **Insight:** The gap is now existential; only the systematized will survive the performance chasm.



# The Reckoning is Here

2026 belongs to those who stop pretending they've adopted AI and start engineering its success.

1. **STOP** selling or buying 'transformation'.
2. **START** fixing the plumbing (Data, Integration, CRM).
3. **SEQUENCE** your maturity: Architecture over Acceleration.

The question is no longer 'Are you using AI?' It is 'Is your AI working?'

# Ready to supercharge your team, AI Strategy, and business?

Come talk to us



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