

# 2027 Revenue Planning Quick Start Playbook.

Six considerations to strengthen your 2027 revenue plan

Salesloft



## 2026 was the year AI became part of everyday revenue work. **2027 will be the year leaders redesign how work gets done with it.**

AI is now part of the revenue process at virtually every organization,[1] but the payoff has been uneven. Adoption has moved faster than results, and as Salesloft CEO Steve Cox points out, most teams have used AI to make individual steps faster without asking whether the process itself should still work that way. In his words, “The business moves continuously, but our systems still rely on people to connect what changed to what happens next.”

**The six considerations that follow are meant to help your team close that gap in 2027.**

01

### Close the gap between strategy and execution.

Are sellers doing what the strategy requires?

02

### Redesign how sellers and AI work together.

Which work belongs to people, and which belongs to agents?

03

### Fix the context your AI depends on.

What information do sellers and agents need to make good decisions?

04

### Decide what AI can do on its own.

Which decisions can AI make without a person?

05

### Build what makes you different.

Where does custom development create an advantage?

06

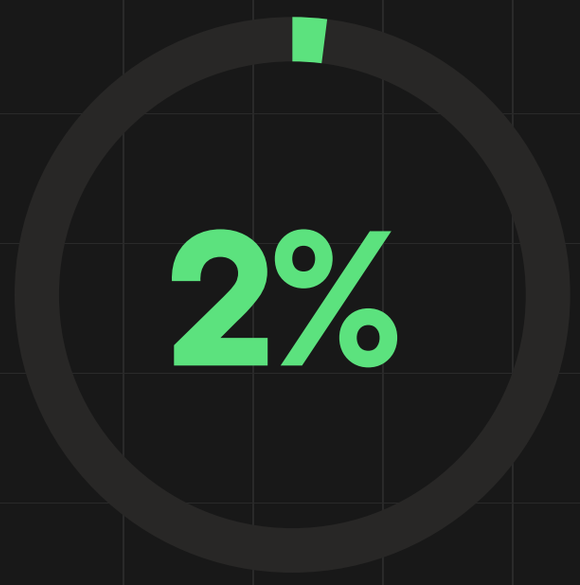
### Make RevOps accountable for AI performance.

Is AI producing measurable value, and who is responsible for improving it?

01

# Close the gap between strategy and execution.

Most 2027 plans will look strong in the planning deck, and the hard part is getting the strategy to survive the trip to the deal. The majority of revenue leaders say half or less of theirs makes it through VPs and managers to reps.




**Only 2% of U.S. revenue leaders say their strategy reaches frontline sellers fully intact.[1]**

## KEY CONSIDERATIONS FOR 2027

01 **Standardize what matters, and let teams flex the rest.** Lock in the deal stages, forecast categories, and risk definitions leadership needs, and let each team run its own motion inside them.

02 **Name what matters most for each role.** As AI takes on more of the job, break your 2027 number into the few weekly activities that drive it for each role, like meetings booked, opportunities created or deals advanced, so every rep knows which numbers they own.

03 **Make the metrics roll up.** As Forrester's Rick Bradberry puts it, "Teams optimize for their own outcomes, and individual employee metrics rarely roll up to customer or enterprise success."[2] Check that every team's 2027 targets trace back to a priority in your plan, and have leaders from each function review them together.

## HOW SALESLOFT CAN HELP CLOSE THE GAP

Put the strategy where the work happens. Look for technology that builds your product, brand, process, and enablement information into the tools sellers already use.

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**One of the things leaders recognized right away with Salesloft was this is a way to actually hold our reps accountable. Our leaders started to feel more confident that their strategy and playbook was being executed."**

**Drew Moldenhauer**
Global Sales Technology Leader

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**Your First 90 Days as CRO**

Even if you're not a CRO, you can get value from the Morning Revenue Read and 13-Week Operating Calendar worksheets.

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02

# Redesign how sellers and AI work together.

Sales organizations that give sellers AI-enabled next best actions are 2.6x more likely to achieve commercial growth, according to Gartner.[3] Cox sets the bar a little higher: “Faster is useful, but better is transformative.”

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### KEY CONSIDERATIONS FOR 2027

01 **Keep the seller at the center.** The seller still owns the relationship, shapes the story, and closes the deal. Plan for agents to take on the work around those moments, like researching the account, sorting priorities, drafting outbound, and watching for risk, so sellers get better context and more time for the conversations that move the deal.

02 **Choose the work agents will own first.** Pick one recurring workflow and define what an agent completes on its own, what it recommends, and where the seller steps in. Start where mistakes are easy to catch and fix, like follow-ups, account research, and data cleanup.

03 **Give the reclaimed time a job.** Decide which deal work and buyer conversations each role should spend the recovered time on, and coach to them.

04 **Build a library of winning moments.** Capture the behaviors and tactics your top reps use, build the best ones into the workflows reps already follow, and show new reps what has already worked in the territory they’re inheriting.

### HOW SALESLOFT CAN HELP CLOSE THE GAP

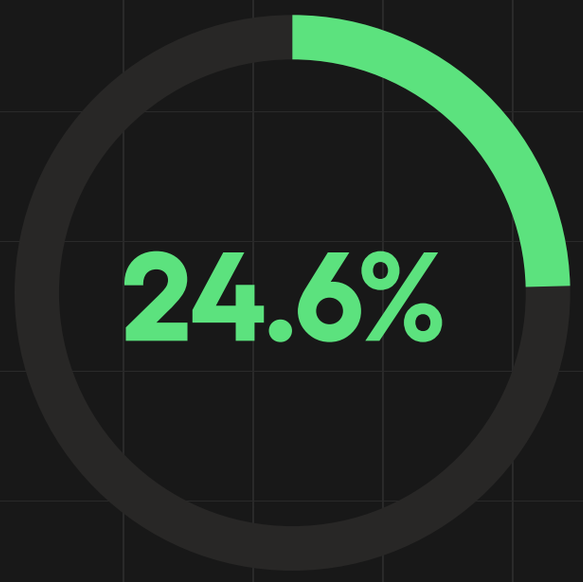
Feedback that lives in a separate tool rarely reaches the next deal. Put account research, deal prep, and risk alerts inside sellers’ daily workflow, and bring conversation insights straight into the next action.

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**Before Salesloft, I didn’t have any guidance. I was doing everything on my own.”**

**Latoya Johnson**
Account Executive




**24.6% of U.S. revenue leaders say AI gives sellers real-time guidance on what to do next in active deals.[1]**

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**A Visual Guide to AI Agents in the Sales Cycle**

See how responsibilities change across the sales cycle, from prospecting and meeting prep through deal management, forecasting, and coaching.

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03

# Fix the context your AI depends on.

AI is only as useful as what it knows. In Salesloft's CIO Research Study, 48% of revenue leaders doubt their data is AI-ready.[4] Conversations are the richest signal in your revenue system because they capture what buyers actually say, and that puts conversation data near the top of the 2027 planning list.

## KEY CONSIDERATIONS FOR 2027

01 **Clean up the data your agents learn from.** Make sure the information your agents rely on is accurate, so sellers and agents work from the same current view of every account. That depends on adoption, since a seller who works outside the system leaves no data behind, and the fastest way to bring them in is to take one task they dislike off their plate.

02 **Test your context for three things.** It has to be complete, up-to-date, and connected, because the real insight lives in how a sentiment shift, a stalled deal, and a missing stakeholder relate to each other.

03 **Audit the signal-to-action path.** Check that each priority signal is captured, reaches reps with full context, is triaged for urgency, and triggers a defined response.

04 **Build plays for the signals tied to revenue.** Separate the signals that can be measurably correlated to revenue from the ones that can't, then build a defined response for the ones that matter.

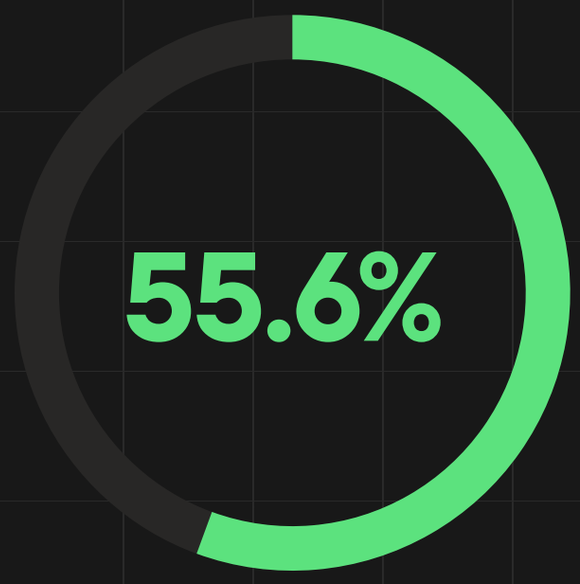
## HOW SALESLOFT CAN HELP CLOSE THE GAP

Bring buyer activity, call insights and deal history together, and surface urgent signals in the seller's workflow before they lose their value.

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**Now AI agents can help us leverage that data to identify where we should be focused and what we should be doing."**

**Adelle B.**
Senior Director of Global Strategy & Execution




**55.6% of U.S. revenue leaders say CRM information is based mostly on subjective seller reporting.[1]**

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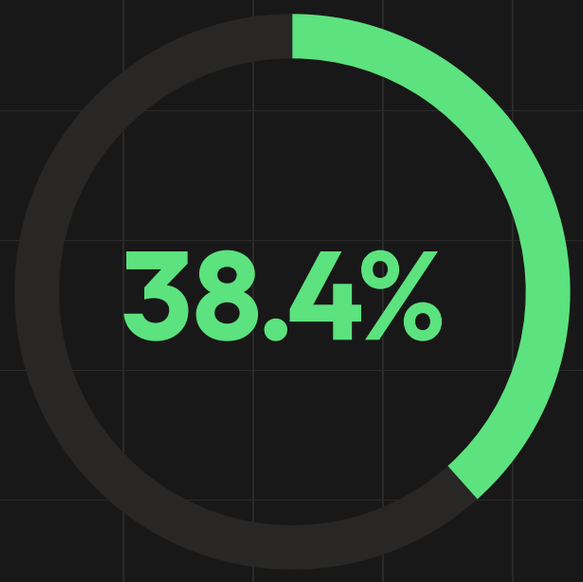
**Your Field Guide to Using Revenue Signals the Right Way**

Use the signal audit and signal-decay framework.

04

# Decide what AI can do on its own.

Revenue leaders are comfortable giving AI a bigger role as long as a person can still step in. The gap is in the rules behind that comfort, since 42% of organizations lack formal governance frameworks for revenue AI, according to Salesloft's CIO Research Study.[4]




**38.4% of U.S. revenue leaders favor guided autonomy, where AI drafts and a person approves.[1]**

## KEY CONSIDERATIONS FOR 2027

01 **Pick an autonomy level for each workflow.** Decide whether AI handles research and summaries only, drafts work for a person to approve, or acts on its own, and set the guardrails and metrics you'll use to check it.

02 **Check AI's work before you widen its role.** Before giving an agent more freedom, make sure you can see why it made a recommendation and who approved it. As Forrester's Anthony McPartlin puts it, "In revenue, trust scales before autonomy."[5] Name who checks agent output in each workflow, and put a regular review of accuracy and outcomes on the calendar.

03 **Form an AI council that includes reps.** Give a cross-functional group the job of steering adoption, gathering feedback, and evolving best practices based on how agents are actually used.

## HOW SALESLOFT CAN HELP CLOSE THE GAP

Look for permissioned data access, audit logging, and oversight you can configure by workflow, and confirm which actions support human review or approval.



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**CIO Research Study: Building the Foundation for AI-Ready GTM Data**

See how revenue and IT leaders are preparing their data and governance for AI.

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05

# Build what makes you different.

AI makes it easy to build a working prototype in an afternoon, so the pull to build everything yourself is stronger than ever. The real cost shows up later, when that prototype has to be integrated, secured, and maintained for years. Save your build capacity for the work that sets your business apart, and run everything else on a platform.

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### KEY CONSIDERATIONS FOR 2027

01 **Start with the problem.** Name what's underperforming and how you'll measure success before anyone picks a tool or a model.

02 **Build only what no one else can.** Custom work earns its cost when it runs on proprietary data or supports a go-to-market motion that doesn't fit the standard sales-led model. Rebuilding what a platform already does adds cost without adding an advantage.

03 **Budget for the life of the build.** A pilot costs a fraction of what production does, and a prototype that works in a demo still needs integration, security, change management, and an owner before reps will trust it, so plan for steady-state cost from the start.

04 **Keep your data portable.** Make sure you own your revenue data and can move it, so you can switch models or tools as they change.

### HOW SALESLOFT CAN HELP CLOSE THE GAP

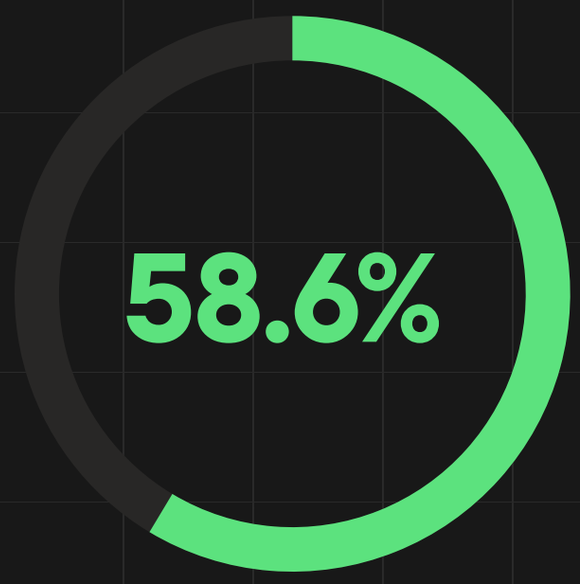
Every team has access to the same models, so your advantage comes from the revenue context you connect to them. Run the work every revenue team shares on a connected platform, and use open interfaces like MCP so the AI you build can draw on that same context.

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**Even if you're successful, you have to maintain it, you have to scale it, you have to transfer it to other people, and you have to govern it."**

**Erik Hagen**
Director of Field Technology & Systems Strategy




**58.6% of U.S. revenue leaders are consolidating or evaluating consolidation of revenue technology.[1]**

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**Build vs. Buy Is the Wrong Question**

Use the full decision framework and production cost model.

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06

# Make RevOps accountable for AI performance.

Gartner found that companies that constantly track AI ROI, treat AI as a portfolio, and cut underperforming initiatives reported positive returns on 81% of their AI initiatives.[6] That discipline needs an owner, and RevOps is the team best placed to run it across the revenue engine.

## KEY CONSIDERATIONS FOR 2027

01 **Manage AI as an investment portfolio.** Give every initiative an owner, one business outcome, a baseline, its total cost including token spend, the business rules built into it, and a review date, so the whole portfolio works toward shared business goals.

02 **Watch adoption as closely as results.** An agent sellers don't trust becomes an agent they stop using, so measure adoption and seller confidence for each agent alongside its business outcome. A good sign is when teams start asking to join without being pushed.

03 **Balance quick wins with lasting ones.** Pair efficiency agents like account research and conversation summaries with skill-development agents like seller coaching and objection handling, which take longer to pay off and connect more directly to revenue growth.

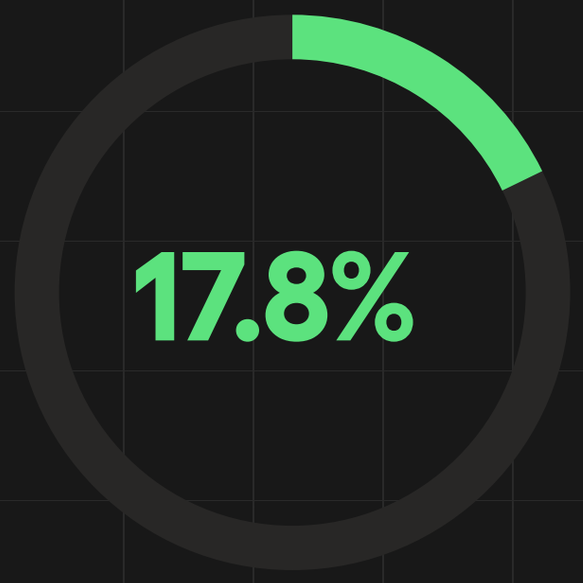
04 **Close the loop on every initiative.** Steve Cox's loop is simple: "What did we do? What happened because of it? What did we learn? What should we do differently next time?"

## HOW SALESLOFT CAN HELP CLOSE THE GAP

Track execution, pipeline, and forecast results in one view. Use impact calculators to plan, then hold each initiative to what actually changed.

"When I've used the tool, my forecast is incredibly precise. Usually within 3% of my first week's call is where my forecast lands."

**Dave S.**
Chief Revenue Officer




**17.8% of U.S. revenue leaders say the true business value of AI isn't clear yet.[1]**

"Predictability matters because credibility is based on doing what you say you're going to do."

**David Schloss**
Chief Revenue Officer

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**AI Agent Impact Calculator**

Model potential impact, then validate against actual results.

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# Your 2027 checklist

- [ ] **Strategy to execution:** Leadership has locked in the standards every team runs inside, each role knows the deals, accounts, and activities they own, and every team's targets roll up to a priority in the plan, with leaders from each function reviewing them together.

OWNER: _____ FIRST REVIEW: _____

- [ ] **People and agents:** Each key workflow has a defined starting point for agents and clear agent and seller responsibilities, each role knows where its reclaimed time should go, and your library of winning moments is started.

OWNER: _____ FIRST REVIEW: _____

- [ ] **Revenue context:** The information your agents rely on is accurate, complete, up-to-date, and connected, and the signals tied to revenue have a defined response.

OWNER: _____ FIRST REVIEW: _____

- [ ] **AI decision rules:** Each workflow has an autonomy level with guardrails and metrics, someone owns checking agent output on a regular review cadence, and an AI council that includes reps is in place.

OWNER: _____ FIRST REVIEW: _____

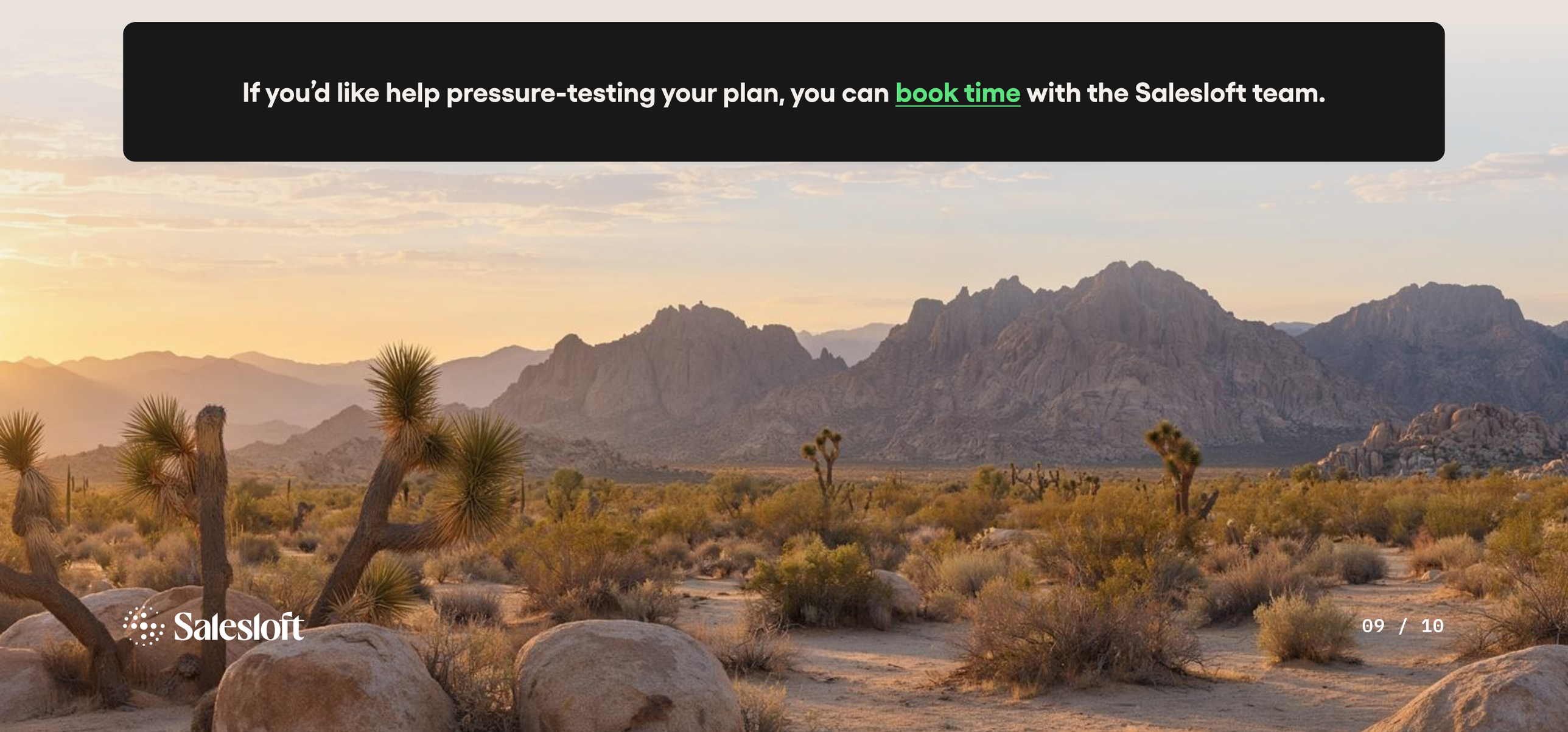
- [ ] **Build vs. buy:** Every custom build starts with a defined business problem, runs on something only you have, is budgeted at steady-state cost, and keeps your revenue data portable if tools change.

OWNER: _____ FIRST REVIEW: _____

- [ ] **RevOps accountability:** Every AI initiative has an owner, one business outcome, a baseline, its total cost and a review date, with seller adoption tracked alongside results.

OWNER: _____ FIRST REVIEW: _____

**If you'd like help pressure-testing your plan, you can book time with the Salesloft team.**





## SOURCES


1. Salesloft, 2026 Revenue Benchmark Report: U.S. Edition. Survey of 500 U.S. sales and revenue decision-makers at organizations with 200 or more employees, conducted by Censuswide, May 28–June 10, 2026.

2. Rick Bradberry and Katie Fabiszak, "It's Time To End Disconnected GTM Efforts," Forrester blog, Forrester Research, Inc., April 14, 2026.

3. "Gartner Survey Finds Sales Organizations That Provide AI-Enabled Next Best Actions Are 2.6x More Likely to Achieve Commercial Growth," Gartner press release, May 20, 2026. Survey of 227 chief sales officers, August–September 2025.

4. Salesloft, CIO Research Study: Building the Foundation for AI-Ready GTM Data, January 15, 2026. Clari + Salesloft research conducted with Censuswide among 400 enterprise CIOs, CROs, and VPs of Sales, RevOps, and IT, excluding Clari and Salesloft customers.

5. Anthony McPartlin, "Agentish Vs. Agentic In GTM: Choose Control Over Autonomy," Forrester blog, Forrester Research, Inc., March 31, 2026.

6. "Gartner Survey Finds Only 22% of Organizations Have Successfully Scaled AI Across Multiple Business Units," Gartner press release, September 1, 2026. Survey of 1,303 respondents, January–April 2026.



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