



**POLARIS**

**AI in GTM Study**



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# 01 | Executive Summary



# Executive Summary

The AI GTM market is generating real, measurable results. Organizations deploying AI sales engagement tools are seeing 32% gains in SDR productivity, 28% higher prospect-to-opportunity conversion rates, and 59% reporting revenue increases. The ROI is no longer theoretical, it's consistent across use cases and company sizes. But the market is fragmented, immature in key areas, and far more complex to navigate than the vendor landscape suggests.

Polaris assessed 42 AI-powered GTM vendors across five categories: Core AI technology, data management & rights, technical architecture, business impact, and enterprise readiness, using a consistent scoring methodology on a 5-point scale. Scores ranged from 2.67 to 4.25. Only three vendors reached the "Excellent" tier. Nearly half the market sits in a competitive mid-tier where marketing outpaces actual capability.



# Executive Summary

The research surfaces four risks most organizations underestimate.

Stack bloat from 5-15 overlapping point solutions with no orchestration layer. Data governance blind spots where ownership terms go unscrutinized until compliance risk and vendor lock-in have already set in. Enterprise readiness gaps show that only ~40% of vendors have proven scalability beyond 1,000 users. And hidden TCO, where stated pricing rarely reflects actual spend once implementation, integration, and unused licenses are factored in.

Vendor selection at this stage is a strategic architecture decision, not a procurement task. Organizations that treat it as such are recovering 15-25% of wasted budget and consolidating 30-40% of redundant vendors.



## 02 | The Momentum in AI GTM




# The Momentum in AI GTM

 **32% SDR Productivity Gain**

Organizations deploying AI sales engagement tools (Regie.ai, AmpleMarket, Smartlead) see average 32% improvement in SDR output

 **28% Higher Conversion**


AI-augmented prospecting drives 28% higher prospect-to-opportunity conversion rates

 **42% Report Cost Reduction**

Latest McKinsey survey (2025) shows 42% of organizations achieving cost reductions from AI implementation

 **59% Report Revenue Increases**

Same cohort reports revenue uplift, suggesting ROI is credible and quantifiable

 **3.5x Content Velocity**

Organizations using AI content platforms (Conversion, Jasper) produce 3.5x more assets with only 15% incremental resource investment



# The Momentum in AI GTM

## Supporting Data



Market is not hype-driven; metrics are measurable and consistent across use cases



However, ROI varies dramatically by tool selection, implementation depth, and organizational readiness



Vendor selection is now a material strategic decision affecting 2026-2027 revenue outcomes



## 03 | Industry Insights



# Market Consolidation & Convergence



40%+ Acquisition Rate

Over 40% of specialized sales engagement vendors acquired or merged in past 18 months



Horizontal vs. Vertical Tension

Platforms compete with vertical specialists



Horizontal Platforms

Easier Implementation – Simpler onboarding, faster ROI proof



Vertical Solutions

30-40% Higher ROI – Vertical-specific tools achieve 30-40% better ROI within target segments due to pre-configured workflows



Integration Breadth = Market Share

Vendors with 150+ direct integrations (Apollo.io) capture 2.3x more market share than point solutions



# The Momentum in AI GTM

## Strategic Implication

The market is sorting into three tiers:


1. **Platforms:** DevRev, ZoomInfo, Apollo.io, Gong capturing enterprise contracts
2. **Specialized Leaders:** Qualified (Piper), Regie.ai, Unify winning mid-market through vertical strength
3. **Niche Winners:** Provarity, Reef.ai capturing vertical segments with superior configuration





## 04 | Market Trends



# 5 Macro Trends Shaping AI GTM

 Autonomous Agents Moving  
from Lab to Production

 Multimodal AI Becoming  
Table Stakes by 2027

 EU AI Act & Data Regs  
Driving Consolidation

 Human in the Loop Design  
Winning Adoption

 Product-Led Growth Viable  
for AI Tools



## TREND 1: Autonomous Agents Moving from Lab to Production



Platforms like , AmpleMarket, Sturdy.ai are moving beyond "assisted" to genuinely autonomous agents



50% of enterprise sales teams will have autonomous agent pilots by end of 2026



Organizations need to plan for organizational design changes (SDR roles → agent trainers)



Leaders who build "fail gracefully" agents (hand off to human vs. making mistakes) will dominate



Regulatory/compliance questions remain unanswered; vendors need audit trails + transparency



## TREND 2: Multimodal AI Becoming Tablestakes by 2027



Integration of text, voice, video, and visual analysis into unified AI systems



50%+ of enterprise sales tech stacks will include multimodal by 2027



Single-modality tools will face pressure; multimodal platforms will command premium



Early movers gaining defensible advantage; followers must integrate quickly



Visual analysis faces regulatory headwinds in EU (visual data = personal data)



## TREND 3: EU AI Act & Data Regulation Driving Vendor Consolidation



Compliance cost to support EU customers creating moat for well-funded vendors



High-risk AI systems (including sales engagement) now require transparency, human override, audit trails. (data localization requirements & bias/discrimination monitoring)



Smaller vendors (Series A) will struggle to afford compliance infrastructure



Competitor Adaptations: Apollo.io/Lusha building EU data residency options, Regie.ai investing heavily in transparency, Qualified adding configurable disclosure options.



EU compliance = competitive moat; vendors with EU offices + infrastructure winning market



# Geographic & Regulatory Landscape

## Regional Dynamics: NA vs. EU vs. APAC

### North America Hyper-Competitive

#### Market stage:

- 20+ well-funded vendors fighting for share

#### Leaders:

- Apollo.io, Gong, Qualified, Regie.ai, Unify

#### Consolidation:

- Expect 3-5 mega-platforms + 5-10 specialists by 2027

#### Regulatory:

- Minimal enforcement; FTC privacy light touch

### EMEA Compliance = Moat

#### Market stage:

- Growing but fragmented; compliance cost is feature, not burden

#### Leaders:

- Lusha (Israel, EU presence), Warmly (EU-based), Regie.ai (EU-optimized)

#### Regulatory:

- EU AI Act (effective 2024+) requires transparency, data residency, bias monitoring

#### Implication:

- Vendors with EU infrastructure winning disproportionate share

#### Buyer strategy:

- Insist on EU data residency + audit trail in contracts

### APAC Underpenetrated

#### Market stage:

- Early, low adoption of AI GTM

#### Leaders:

- None dominant; US vendors expanding; regional distributors

#### Opportunity:

- Ground-floor for vendors

#### Regulatory:

- Varied by country (Singapore strong; India weak; China closed)



## TREND 4: "Human-in-the-Loop" Design Winning Adoption



Organizations are rejecting fully autonomous systems in favor of AI-suggestions



Solutions with human-in-loop design (Loyee.ai, Sturdy.ai) showing 2.3x higher adoption than fully autonomous.



Enterprise resistance to "AI decides" models; preference for "AI recommends"



Change fatigue + trust concerns; reps want agency over being replaced



Vendors selling "AI handles it" losing enterprise deals to "AI helps you"



Positioning matters; messaging must emphasize augmentation, not replacement



## TREND 5: Product-Led Growth Emerging as Viable GTM for AI Tools



SaaS GTM model shifting; PLG reducing cost of customer acquisition vs. sales-led



35% of SaaS tools now primarily PLG vs. 15% in 2020. PLG tools see 40% lower CAC but 25% higher churn (trade-off)



**PLG Winning Tools:** Copy.ai, Jasper, Clay, Smartlead, Instantly



**SLG Winning Tools:** Apollo.io, Gong, Gainsight, Qualified, Regie.ai



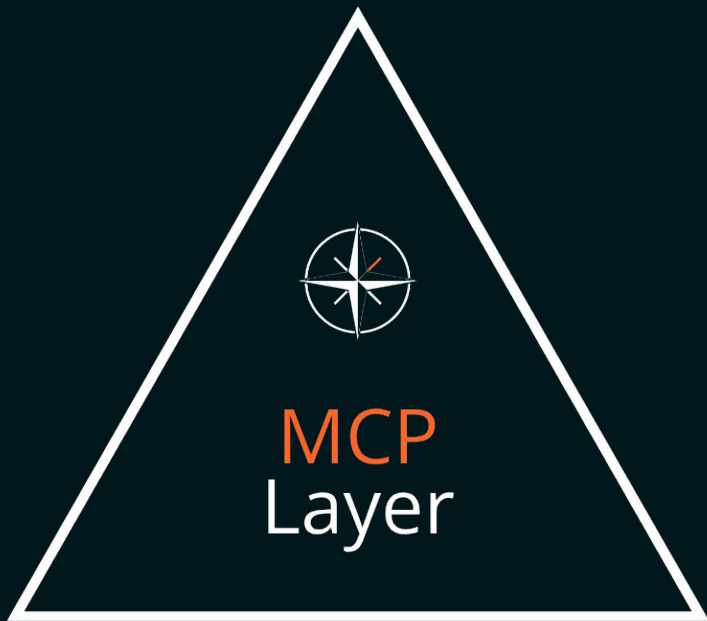
PLG tools = faster onboarding but less support; Sales-led = slower but more hand-holding



## 05 | Vendor Landscape



Systems of  
Record



Systems of  
Information

Systems of  
Action





# How We See the World

Stitching Process,  
Tools & Data Together



# The Trifecta

Stitching Process, Tools & Data Together

	Category	Definition	Example Tool Types
	<b>Systems of Record</b>	Conversational intelligence	Captures and stores interaction data
	<b>Systems of Information</b>	Buyer & account intelligence, data enrichment	Tells you who and what
	<b>Systems of Action</b>	Outbound automation	Does things on your behalf
	<b>MCP Layer (center)</b>	Automation & orchestration	Connective tissue moving data between systems



# Vendor Summary Analysis

## POLARIS APPROACH

- Assessed 42 AI-powered GTM vendors.
- Using a consistent scoring Methodology across 5 categories.
  - Core AI Technology
  - Data Management & Rights
  - Technical Architecture
  - Business Impact
  - Enterprise Readiness
- The analysis reveals significant market fragmentation, performance variance, and hidden complexity.

AI Vendor Evaluation Framework				
	Category/ Sub Category	Cat Weight	Sub Cat Weight	# Out of 5
<b>1</b>	<b>Core AI Technology</b>	<b>31%</b>		<b>Core AI: 1.55 (31%)</b>
	1.1 LLM Architecture		8%	
	1.2 Model Performance		8%	
	1.3 Training Capabilities		7%	
	1.4 Innovation Pipeline		8%	
<b>2</b>	<b>Data Management &amp; Rights</b>	<b>16%</b>		<b>Data Management: 0.80 (16%)</b>
	2.1 Data Ownership		4%	
	2.2 Privacy Controls		4%	
	2.3 Proprietary Assets		4%	
	2.4 Usage Right		4%	
<b>3</b>	<b>Technical Architecture</b>	<b>22%</b>		<b>Technical Architecture: 1.10 (22%)</b>
	3.1 Extensibility		9%	
	3.2 Integration		8%	
	3.3 Security		5%	
<b>4</b>	<b>Business Impact</b>	<b>23%</b>		<b>Business Impact: 1.15 (23%)</b>
	4.1 ROI Metrics		10%	
	4.2 Value Differentiation		7%	
	4.3 Cost Management		6%	
<b>5</b>	<b>Enterprise Readiness</b>	<b>8%</b>		<b>Enterprise Readiness: 0.40 (8%)</b>
	5.1 Implementation		3%	
	5.2 Scalability		3%	
	5.3 Support & Reliability		2%	
	<b>Total Weights</b>	<b>100%</b>	<b>100%</b>	<b>5.00</b>

Vendor	Core AI Technology	Data Management & Rights	Technical Architecture	Business Impact	Enterprise Readiness	Total
Out Of	1.55	0.80	1.10	1.15	0.40	5
1 Gong	1.29	0.68	0.94	0.99	0.36	4.26
2 Clay	1.20	0.67	0.97	0.96	0.33	4.13
3 DevRev	1.25	0.63	0.94	0.93	0.32	4.07
4 Common Room	1.20	0.65	0.93	0.90	0.31	3.99
5 Qualified (Piper)	1.24	0.61	0.89	0.88	0.32	3.94
6 Apollo.io	1.07	0.64	0.94	0.92	0.32	3.89
7 Spara.co	1.25	0.62	0.87	0.82	0.31	3.87
8 Regie AI	1.21	0.61	0.88	0.84	0.31	3.85
9 UserGems	1.10	0.63	0.89	0.92	0.30	3.84
10 SalesIntel	0.96	0.68	0.90	0.96	0.34	3.84
11 Anam	1.17	0.60	0.91	0.85	0.30	3.83
12 ChiliPiper	0.94	0.62	0.94	0.97	0.34	3.81
13 ZoomInfo GTM Studio	1.11	0.63	0.90	0.85	0.31	3.8
14 Conversion.ai	1.22	0.56	0.79	0.86	0.32	3.75
15 Traction Complete	1.01	0.60	0.90	0.90	0.32	3.73
16 Scalestack	1.05	0.58	0.84	0.86	0.29	3.62
17 Uman	1.07	0.58	0.83	0.82	0.30	3.6
18 Momentum	1.07	0.58	0.83	0.82	0.30	3.6
19 Vasco	1.03	0.55	0.81	0.88	0.28	3.55
20 Lusha	0.78	0.68	0.92	0.85	0.32	3.55
21 Intellistack	0.93	0.56	0.95	0.83	0.25	3.52
22 n8n	0.93	0.56	0.95	0.83	0.25	3.52
23 Zapier	0.93	0.56	0.95	0.83	0.25	3.52

Vendor	Core AI Technology	Data Management & Rights	Technical Architecture	Business Impact	Enterprise Readiness	Total
Out Of	1.55	0.80	1.10	1.15	0.40	5
24 Alfa	1.07	0.54	0.75	0.83	0.28	3.47
25 Instantly	1.01	0.50	0.71	0.98	0.26	3.46
26 Reef.ai	1.04	0.56	0.82	0.77	0.26	3.45
27 Smartlead	0.98	0.50	0.86	0.82	0.28	3.44
28 Unify	0.98	0.50	0.86	0.82	0.28	3.44
29 Warmly	0.98	0.50	0.86	0.82	0.28	3.44
30 Openprise	1.01	0.54	0.80	0.81	0.26	3.42
31 AmpleMarket	1.04	0.54	0.74	0.81	0.26	3.39
32 Jasper AI	0.97	0.51	0.77	0.82	0.27	3.34
33 FullCast	0.93	0.52	0.78	0.82	0.26	3.31
34 Pocus	1.02	0.50	0.77	0.76	0.24	3.29
35 Provarity	0.98	0.49	0.72	0.76	0.25	3.2
36 Attention	0.90	0.50	0.77	0.76	0.26	3.19
37 Default	0.81	0.48	0.79	0.80	0.27	3.15
38 Agency.inc	1.01	0.47	0.62	0.76	0.23	3.09
39 Zinnia	0.87	0.50	0.66	0.71	0.27	3.01
40 Hook	0.89	0.49	0.62	0.71	0.21	2.92
41 BackEngine	0.84	0.43	0.61	0.73	0.20	2.81
42 ClientSuccess	0.81	0.42	0.57	0.66	0.21	2.67



# Key Findings:

## Wide Performance Variance Complicates Vendor Selection

- Score range: 2.67 to 4.25 (1.58-point spread on 5-point scale)
- Only 3 vendors (7%) scored >4.0 – "Excellent" tier is sparse
- 20 vendors (48%) in 3.50-3.99 range – competitive mid-tier
- 3 vendors (7%) below 3.0 – significant maturity gaps



## So What:

- Not all "AI GTM tools" deliver equivalent value.
- Organizations lack clear selection criteria and often choose based on marketing rather than capability fit.
- Vendor selection requires rigorous assessment methodology.



# Enterprise Readiness Gaps Create Operational Risk

- Enterprise Readiness represents **only 8%** of total score but critical for scale
- Many vendors score **<3.5** on system reliability – uptime concerns for business-critical workflows
- Support structures vary widely – from 24/7 dedicated CSMs to email-only basic support
- Deployment timelines: **2 weeks** (best) to **6+ months** (complex) – predictability low
- Scalability proven for only **~40%** of vendors beyond 1,000 users



## So What :

- Tools selected for features may fail at enterprise scale.
- Support gaps, reliability issues, and scaling challenges emerge post-purchase.
- Organizations need rigorous enterprise readiness diligence before committing to vendors.



# Category Concentration: Clear Winners, Notable Gaps

## Dominant Players

- Conversation Intelligence: Gong (4.25) – clear category leader, 70%+ market share
- Data Enrichment: Apollo.io (3.90), Clay (4.12) – strong competition
- Revenue Intelligence: Common Room (3.99), DevRev (4.08) – emerging leaders

## Fragmented Categories

- Workflow Automation: Zapier (3.70), n8n (3.65) – no dominant player, high customization needs
- Outbound Automation: 8+ vendors (Instantly, Smartlead, Reef.ai.) – commoditized, price competition
- GTM Orchestration: Emerging category with no clear leader – innovation opportunity



## So What :

- Few organizations scrutinize data ownership terms during procurement.
- Compliance risk, exit complexity, and vendor leverage emerge later.
- Data governance assessment critical before vendor selection.



# Hidden Cost Complexity Obscures True Total Cost of Ownership

- Cost Management scores average **3.5-4.0** – transparency is moderate
- Pricing models vary: seat-based, usage-based, tiered feature gates
- Hidden costs emerge: implementation services (**\$10-50K**), integration customization, training, change management
- Scaling costs: some linear, others exponential at enterprise volume
- License utilization: many organizations have **20-30%** unused seats due to poor governance



## So What :


- Stated pricing  $\neq$  actual total cost of ownership.
- Organizations lack visibility into total spend, scaling costs, and optimization opportunities.
- Spend analysis and license optimization can recover **15-25%** of AI GTM budget.





# STRATEGIC IMPLICATIONS


For Organizations Deploying AI GTM Stacks




 **Selection Complexity**  
42 vendors with overlapping capabilities make vendor selection a strategic capability, not a procurement task

 **Stack Bloat Risk:**  
Average enterprise deploys 5-15 GTM point solutions. Without architecture oversight, tool sprawl creates integration complexity and wasted spend

 **Enterprise Readiness Diligence:**  
Many vendors lack proven scalability, reliability, or support structures. Post-purchase friction common.

 **Data Governance Blind Spot:**  
Data ownership, export rights, and privacy controls vary significantly. Compliance and vendor lock-in risks underestimated

 **TCO Visibility Gap:**  
Hidden costs and scaling complexity obscure true investment. Budget overruns common without rigorous cost modeling.



# THE OPPORTUNITY

## The Problem

- Vendor selection without rigorous methodology leads to poor fit
- Stack architecture gaps create integration complexity and data silos
- Enterprise readiness blind spots cause post-purchase friction
- Data governance oversights create compliance risk and lock-in
- Total cost of ownership invisibility drives budget overruns and waste



# THE OPPORTUNITY

## The Solution: Polaris GTM Audit

- Portfolio rationalization – identify redundant spend and consolidation opportunities
- Capability gap analysis – map current stack against business requirements
- Integration architecture assessment – quantify complexity and identify clear paths
- Enterprise readiness scoring – flag operational risks before they materialize
- Data governance review – ensure compliance and minimize lock-in
- Total cost of ownership modeling – surface hidden costs and optimization opportunities

## Typical Outcomes

- 30-40% vendor reduction in fragmented categories
- 15-25% cost recovery through license optimization and consolidation
- Risk mitigation through enterprise readiness and data governance diligence
- Roadmap clarity for AI GTM stack evolution

# Thank You



IF YOU HAVE ANY QUESTIONS  
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## 06 | Appendix



# Future GTM Tech Considerations

## Foundation Model Strategy (LLM Choice)

Platforms using larger, more capable models (Claude 3 Opus, GPT-4) show 25-35% higher accuracy on complex sales tasks vs. smaller models

### Example:

Regie.ai's migration from GPT-3.5 to custom-tuned Claude 3 Opus drove 47% improvement in email response rates

### Competitive implication:

Smaller, specialized models can compete if task-optimized (e.g., Lavender.ai for email optimization)

### Risk:

Dependence on any single LLM provider creates vendor lock-in

## Data Network Effects (Proprietary Datasets)

Platforms with access to billions of B2B interaction records (Apollo.io, Lusha, Warmly) outperform competitors on pattern recognition

### Example:

Apollo.io's 500M+ contact database + engagement signals enables continuous model improvement impossible for smaller competitors -

### Caveat:

Data advantage is becoming regulatory liability (LinkedIn scraping bans, EU AI Act scrutiny)

## Enterprise Scalability + Natural Language Interaction

Long-term staying power goes to vendors that:

- Scale to 5,000+ seat deployments without degrading UX or requiring extensive SI services
- Support natural language interaction (vs. rigid prompt structures)
- Offer transparent data handling and provide customers genuine control over model behavior
- Example: Gainsight's enterprise maturity mitigated their slower AI integration