INSIDE YORK IE'S GTM ASSESSMENTS: WHERE REVENUE OPERATIONS BREAK DOWN

An anonymized look at revenue operations challenges across fintech payments, employee-communications software and healthcare services companies ranging from $35M to $600M in scale.

KEY TAKEAWAYS

AI ambitions outpace data readiness. Teams want AI in their revenue processes but lack the data and context to support it at scale.

Revenue work happens outside the CRM. Account planning, selling and renewals rely on spreadsheets, inboxes and institutional knowledge.

Forecast fields lack consistent processes. Fields are configured, but submission cadences, roll-ups and accuracy tracking are missing.

Qualification frameworks aren't consistently enforced. Overly complex requirements get bypassed, while unenforced fields sit empty.

Marketing spend isn't reliably tied to pipeline. Gaps in campaign attribution prevent teams from connecting marketing activity to revenue.

Renewals and expansion remain largely manual. In nearly every case, the revenue boards count on most is the least systemized.

Teams need sequencing and capacity. Many problems are already known, but competing initiatives and limited bandwidth constrain progress.

THE PATTERN WE KEEP SEEING

Across recent York IE GTM/RevOps assessments of companies ranging from roughly $35M to $600M in scale, the same gaps appeared: no company had a governed forecasting process, a systematic renewal process or clean CRM data.

Leadership generally knew where the problems were. But the system of record wasn't the system of work. Qualification, forecasting, account planning and renewals were happening outside the CRM, and the data needed to run and predict the business wasn't consistently captured.

Technology stacks were also crowded and undergoing transitions at every company assessed. One had more than 40 tools, with roughly half not integrated with anything else.

INSIDE THE ASSESSMENTS

Fintech Payments: Disconnected Account Planning, Attribution and AI

Within fintech payments, account plans, whitespace analysis and quarterly business reviews were entirely offline. Account managers were working in Power BI rather than the CRM. As one leader put it, “the white space is all offline, frankly.”

Marketing attribution was also incomplete. None of roughly 21,000 opportunities over the preceding year were linked to a campaign, and conversion values flowing back to advertising platforms were recorded at $0. A second, unrelated company in the assessment set had an almost identical attribution rate.

One of our assessments within this industry was the furthest along in AI adoption – with more than 100 agents live company-wide, along with extraction agents and third-party enrichment scoring. Leadership nevertheless expressed concern about tool sprawl.

Employee-Communications SaaS: Complex Qualification and Competing Programs

Within employee communications, the qualification framework was built as a custom object containing 139 fields. Reps were bypassing the framework, and deals were clustering in the earliest stages rather than progressing through enforced qualification requirements.

The internal systems team had already self-diagnosed 50+ issues and kicked off a greenfield reset, but was running five transformation programs in parallel with no sequencing plan or dependency map tying them together.

Healthcare Services: Incomplete Forecasting and Renewal Follow-Through

Within healthcare services, the Forecast Category field was populated on just over 6% of open pipeline. More than half of the forecast was older than the average sales cycle.

Roughly one in six dollars of the prior fiscal year’s revenue arrived as unforecasted “surprise revenue.”

Customer retention presented another gap. Lost business for the year had already exceeded the vast majority of new business booked. A weekly at-risk account board flagged customer risks, but no downstream process acted on those signals.

TURNING KNOWN GAPS INTO CLEAR PRIORITIES

Within this assessment set, the same issues appeared repeatedly: incomplete CRM data, revenue activities managed outside the system and inconsistent forecasting and renewal processes.

Teams already understood many of the problems. The recurring constraint was sequencing the work and having the capacity to follow through.

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