

2026

B2B Growth and Technology Trends Report

Why Most B2B Professional Services
Growth Efforts Stall & How to Operate
Like a High Performer in 2026

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Growth Activity Is Increasing Faster Than Readiness to Scale

As a marketing and sales consulting firm, we often hear leaders of professional services firms say they want to scale. They add headcount, expand services, increase marketing spend, and hire sales teams, assuming more activity will lead to more growth.

But activity does not create growth. Momentum does.

Momentum is the signal that growth is real, repeatable, and sustainable. It shows up as predictability, clarity, and confidence in what works. Growth comes from focus, alignment, and repeatable execution. Without proven momentum, attempts to scale are premature.

This distinction matters because most firms are not failing to grow. They are failing to prove that their growth can be sustained. They want to invest in scale before they have earned it. Momentum is the exit criterion. It is the evidence that the business is ready for scale, not just eager for it.

Throughout this report, we use momentum to describe growth that is not sporadic or fragile. Momentum means you can see what is working, repeat it with confidence, and trust the systems supporting execution. Until that exists, scale only amplifies uncertainty.

This report shows that most stalled growth is not a strategy problem or a budget problem. It is a sequencing problem. Firms are attempting to scale before they have proven the systems required to support it.

What Momentum Actually Looks Like

Across B2B professional services, growth activity is increasing, but momentum is not. Firms are busier than ever, yet predictability, repeatability, and clarity lag behind.

MOMENTUM IS:

- ✓ Pipeline building month over month (not flat or declining)
- ✓ Stable or improving conversion rates (not volatile)
- ✓ Knowing which activities produce results (not guessing)
- ✓ Relatively predictable sales cycles (not wildly variable)
- ✓ Ability to forecast next quarter's pipeline with reasonable confidence (not hoping)

MOMENTUM IS NOT:

- ✗ Revenue growth (that's an outcome, not a state)
- ✗ Activity levels (you can be busy without momentum)
- ✗ Feeling good about the business (that's subjective)

The absence of momentum creates frustration, wasted effort, and stalled growth. Firms feel like they are doing more, yet moving less.



High Performers vs. Low Performers

We surveyed 161 B2B leaders about their sales and marketing structures, performance, challenges, technology adoption, and resource allocation.

The dataset included organizations with annual revenues ranging from under \$1M to \$50M+, representing early-stage companies through mid-market firms.

This report presents the key differences between high-performing and low-performing firms and defines what must be in place before growth can meaningfully accelerate, helping you determine where to focus next in 2026.

To understand performance differences, we segmented respondents by self-reported results:



161 B2B Leaders Surveyed



Sales and Marketing Structures Studied



Growth Challenges



Technology Adoption



Resource Allocation



Companies: \$1M-\$50M in Annual Revenue



Startups through Mid-Market Firms

HIGH PERFORMERS

32%

Revenue results better than expected AND improved pipeline quality

(32% of sample, 43 companies)

LOW PERFORMERS

37%

Revenue results that didn't exceed expectations AND no improvement in pipeline quality

(37% of sample, 50 companies)

High-performing teams aren't necessarily the largest or fastest-growing. They're showing both stronger results and an improving trajectory, the dual indicators of momentum. By comparing what these teams do differently, we can identify the operational patterns that enable momentum.

The Core Finding

The strongest predictor of momentum in this data is not budget, headcount, or tools. It is infrastructure integrity.

Most firms have moved past survival, but they are not yet ready to scale. Activity is increasing, but the systems supporting that activity are incomplete, inconsistent, or underutilized. The result is growth that feels fragile and unpredictable.

When we segment the data by performance, a clear pattern emerges. High-performing firms and low-performing firms are not solving the same problems. Their bottlenecks are different because their stages of growth are different.

High-performing teams cite capacity and execution as their primary constraints. They have pipeline visibility, aligned systems, and repeatable processes. Their limitation is bandwidth. These firms have momentum.

Low-performing teams cite pipeline volume and conversion as their primary constraints. They lack visibility into what works, shared definitions across teams, and systems that support consistent execution. These firms do not yet have momentum.

**This is not simply a difference in results.
It is a difference in readiness.**





How to Use This Report

This report presents 5 insights, each supported by data comparing high-performing and low-performing firms. Each insight explains what the data reveals, why it matters, and what must be in place before growth can advance to the next stage.

Each section also includes a practical test to help you assess whether this is a current constraint in your business.

Together, these insights are designed to help you identify where momentum is breaking down, and what needs to be proven before attempting to scale.

Insight 1

Infrastructure Comes Before Momentum

Momentum depends on predictability. Predictability depends on visibility. Yet many firms attempt to scale growth before they can see what is actually happening inside their pipeline.

They add campaigns, hire sellers, and invest in tools without systems that show what converts, where deals stall, or why results fluctuate. When visibility is missing, growth problems are easy to misdiagnose.

What looks like a pipeline problem is often an infrastructure problem in disguise. Most firms reporting pipeline as their primary bottleneck do not have a system capable of measuring pipeline performance. Without that visibility, growth becomes guesswork. And guesswork cannot create momentum.

Momentum cannot exist without visibility. If you cannot see what works, you cannot repeat it. If you cannot repeat it, you have not yet proven growth.



The Pattern We Saw

Most pipeline problems are not demand problems, they are visibility problems. When firms try to scale pipeline without systems that show what converts, growth becomes guesswork.

Bottleneck

Pipeline volume
(generating enough leads)

Team capacity/bandwidth
(execution bottleneck)

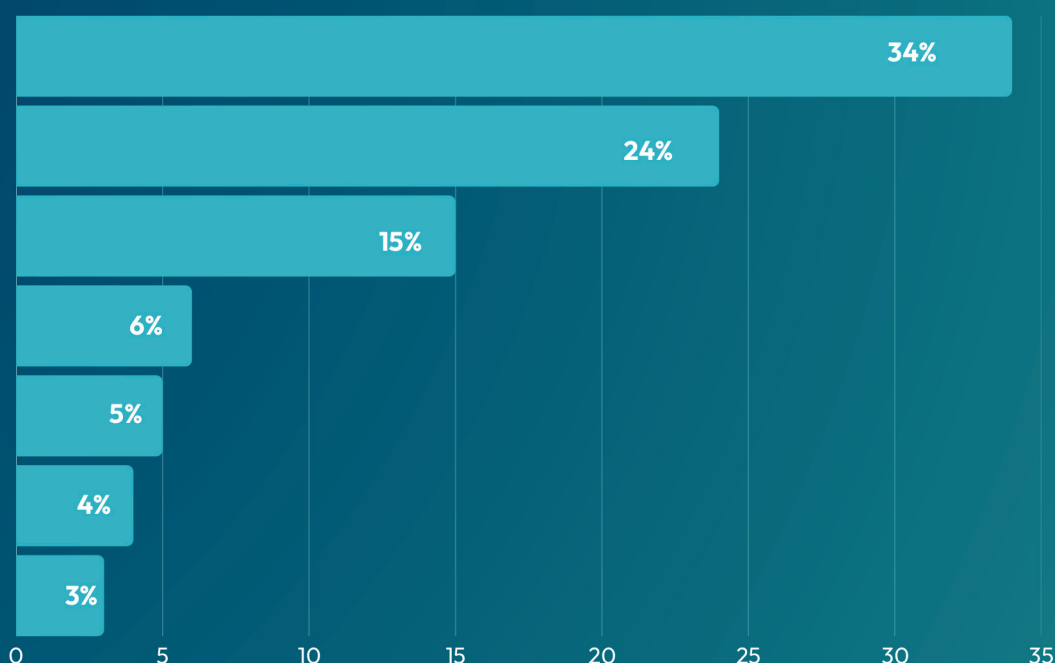
Close rate/conversion

Sales capacity
(too few sellers)

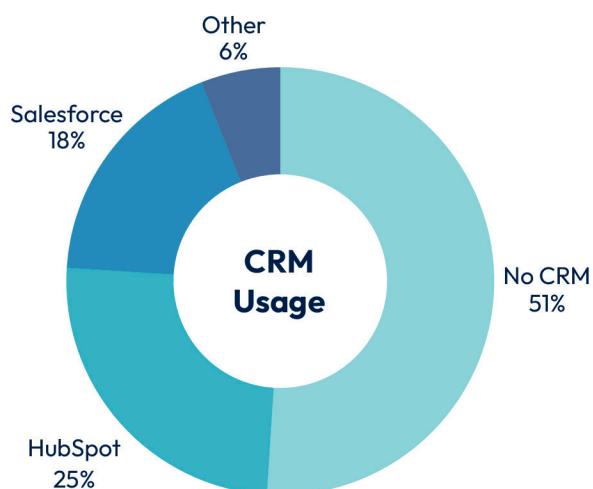
Delivery capacity
(operational limits)

ICP/Positioning clarity

Offer/pricing strategy



% Citing as #1 Issue



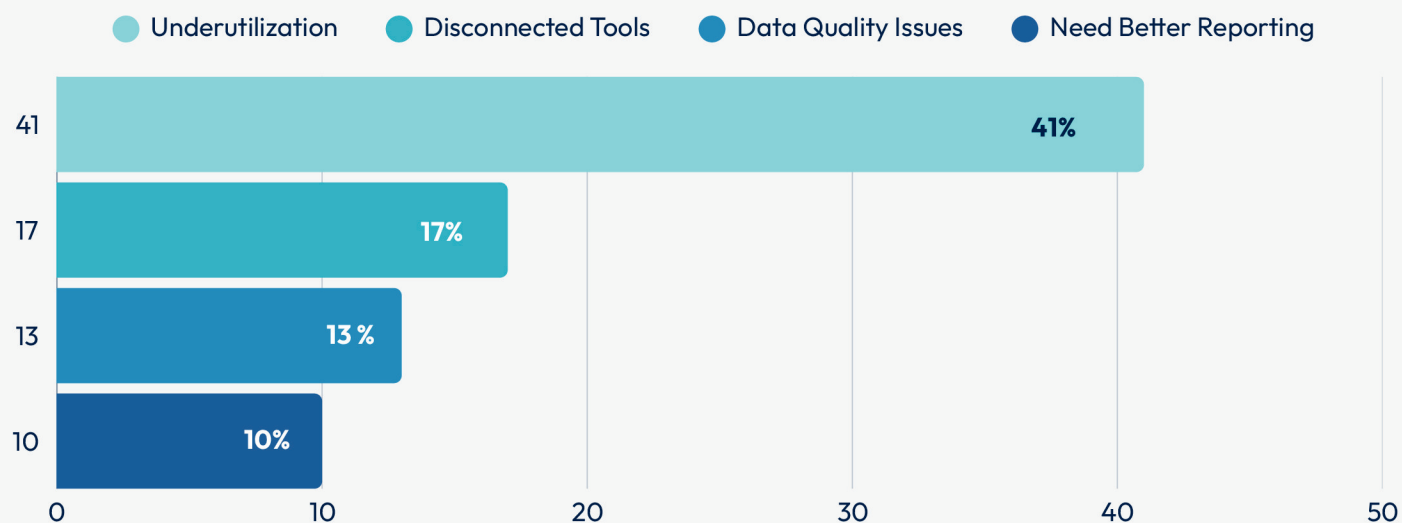
But you can't diagnose a pipeline issue without a system to measure it.

51% of respondents report using no CRM or relying on spreadsheets and disconnected tools.

Another 25% use HubSpot, and 18% use Salesforce.

But when we look at technology challenges, 41% say their biggest issue is **underutilization of existing tools**.

Technology Challenges



Almost half of respondents say pipeline is their biggest challenge, while at the same time, half operate without a system capable of tracking, measuring, or managing performance.

What It Actually Means

This isn't a pipeline problem. It's an infrastructure problem disguised as a pipeline problem. When you don't have a CRM, you can't see where leads come from, where they stall, or what actually converts. You're flying blind. And when you're flying blind, the natural instinct is to assume the issue is volume. "We need more leads." So you run more campaigns. You hire a salesperson. You increase activity.

But more leads into a broken system just means more chaos. Without visibility into conversion rates, cycle length, or drop-off points, you can't diagnose what's actually broken. You're treating the symptom (not enough pipeline) instead of the disease (no system to manage the pipeline you have).

You cannot build momentum without visibility. And you cannot have visibility without systems.

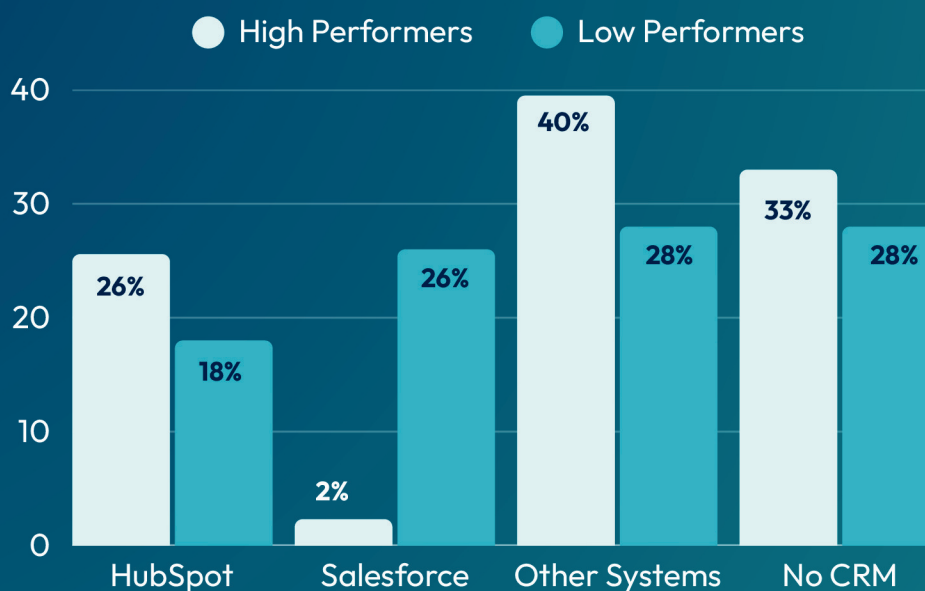
What High-Performing Teams Do Differently

High-performing teams are significantly more likely to use a structured CRM and use it consistently. This is not just correlation. Performance and visibility reinforce each other. High performers build infrastructure earlier, and that infrastructure makes performance easier to repeat.

A CRM doesn't make you high-performing. But momentum requires visibility, and visibility requires systems. High-performing teams tend to build infrastructure before they try to add significant activity. In practice, they invest in visibility earlier and resist increasing activity until the system can support it.

**Infrastructure gaps don't show up when you're small.
They show up the moment you try to grow.**

CRM Usage by Performance Level



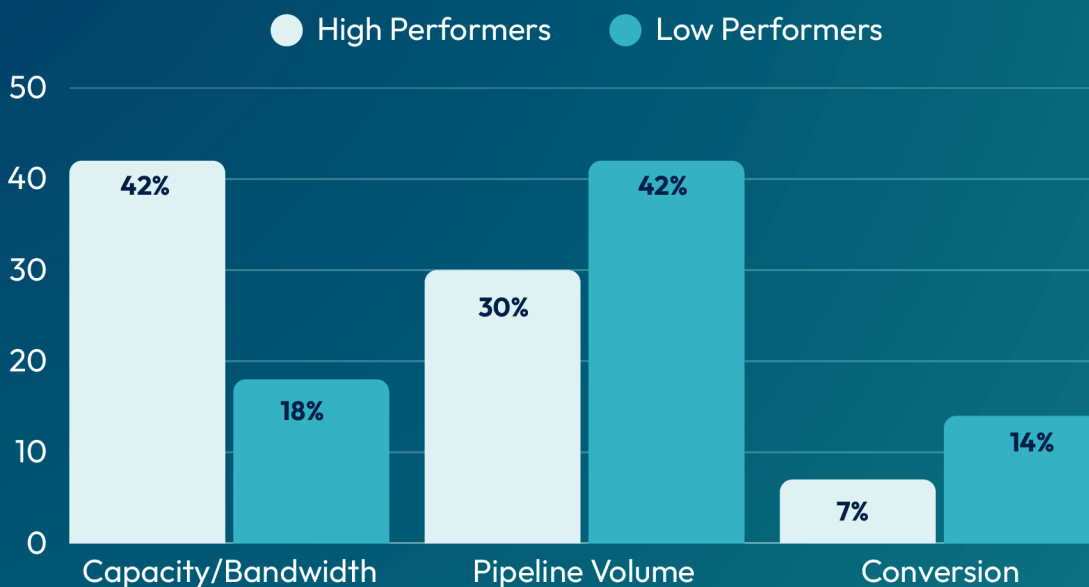
When a high-performing team says "pipeline" is their bottleneck, they mean something different than a low performer does. They mean: "We have visibility into our funnel, we know our conversion rates, and the constraint right now is top-of-funnel volume."

They're diagnosing a known variable.

When a low-performing firm says "pipeline" is their bottleneck, they often mean: "We don't have enough revenue, and we think it's because we don't have enough leads, but we actually have no idea because we're not tracking anything systematically."

Same word. Completely different problem.

Stated Bottlenecks by Performance Level



What To Do Next

THE INFRASTRUCTURE TEST

Before you invest in pipeline generation, ask:

- Y | N** Do we track every lead in one system?
- Y | N** Can we see conversion rates at every stage?
- Y | N** Do sales and marketing agree on what "qualified" means?
- Y | N** Can we identify our best-performing lead sources?

If you answered "no" to any of the questions above:

- 1. Stop adding activity until you can measure it.** More campaigns, more outreach, more content. None of it matters if you can't track what converts. Pause the "more" instinct and focus on visibility first.
- 2. Pick one system and use it fully.** You don't need the perfect CRM. You need one CRM that your team actually uses. HubSpot, Salesforce, Pipedrive. Pick one. Get every lead in it. Get every conversation in it. Get your team to update it consistently.
- 3. Define what a qualified lead actually is.** If sales and marketing can't agree on what counts as a qualified lead, you don't have a pipeline problem. You have a definitional problem. Write it down. One sentence. Make everyone use it.
- 4. Measure conversion at every stage.** From inquiry to qualified lead. From qualified lead to meeting. From meeting to proposal. From proposal to close. If you can't measure each step, you can't improve any step.
- 5. Resist the urge to add activity until the system works.** This is the hardest part. The instinct is to hire another salesperson or double the ad spend. But if you add activity to a broken system, you just get more chaos. Infrastructure first, then momentum.

Insight 2

Activity Isn't Alignment

Once firms invest in infrastructure, a new assumption often follows: that shared data automatically creates alignment.

Sales and marketing meet regularly. Dashboards are reviewed. Conversations happen. On the surface, things look aligned. But shared access does not guarantee shared understanding.

Alignment is not conversational. It is structural.

Without shared definitions, shared goals, and shared systems, teams can be active together while still pulling in different directions. Meetings create the appearance of progress, but momentum does not follow. High-performing teams align around systems. Low-performing teams negotiate alignment in meetings.

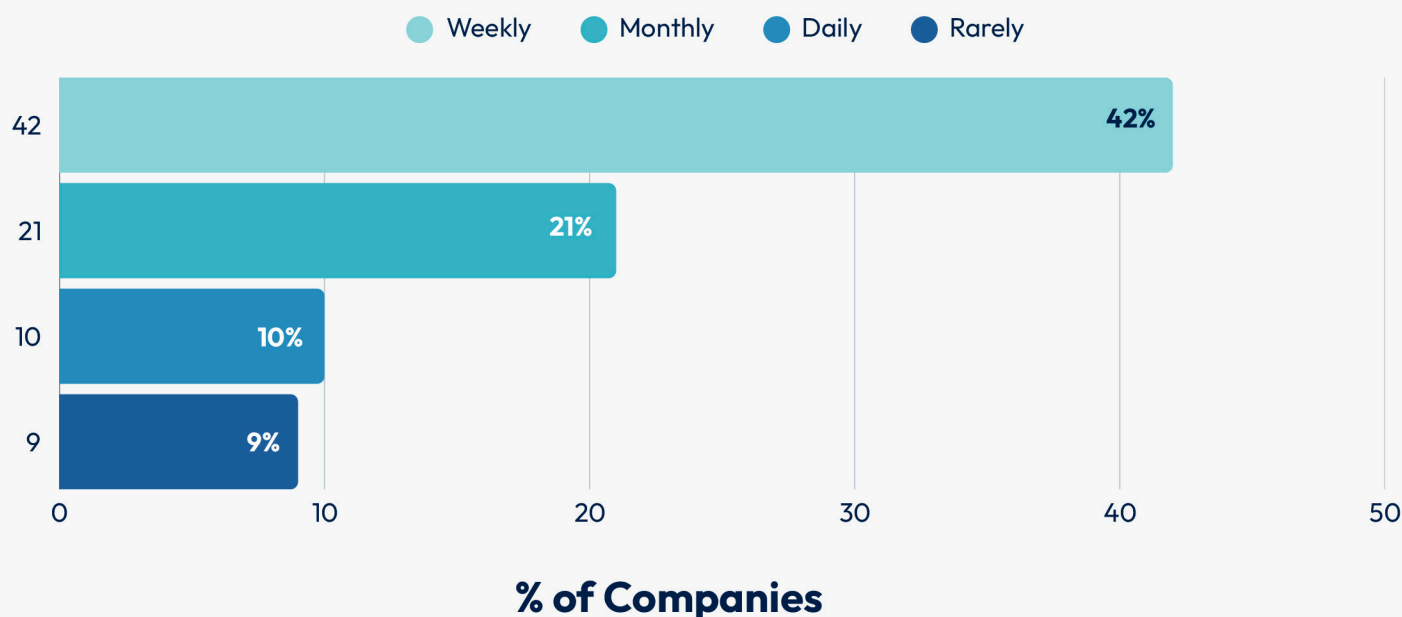
Momentum requires coordination that does not rely on interpretation or persuasion. It requires operating from the same data, toward the same outcomes, with the same definitions. Until that structure exists, activity increases friction, not progress.



The Pattern We Saw

38% of respondents report full integration between sales and marketing. This is down slightly from 40% in 2024. When we asked about operating cadence, most firms report regular meetings between sales and marketing teams, with weekly or biweekly syncs being the most common.

How Often Sales & Marketing Meet



On the surface, this looks like alignment. Teams are talking. They're in the same room (or Zoom). They're discussing pipeline, campaigns, and targets.

But when we segment by performance, a different picture emerges. High performers and low performers meet at similar frequencies. The difference isn't how often they meet.

It's what they're aligned around.

What It Actually Means

Most firms confuse coordination with alignment.

Meeting weekly feels like alignment. You're in the same room. You're discussing the same topics. You leave feeling like you're on the same page. But if the teams walk out of that meeting and return to separate systems, separate dashboards, and separate definitions of what "qualified" means, nothing has actually aligned.

This is performative alignment. It looks like teamwork, but it doesn't function like teamwork.

Real alignment is structural, not conversational. It means:

- Sales and marketing work from the same CRM
- Both teams use the same lead qualification criteria
- Both teams measure success against the same revenue goals
- When one team updates the system, the other team sees it immediately

Without this infrastructure, meetings become negotiation sessions. Sales questions lead quality. Marketing questions follow-up speed. Both reactions are predictable outcomes of teams working from different data.

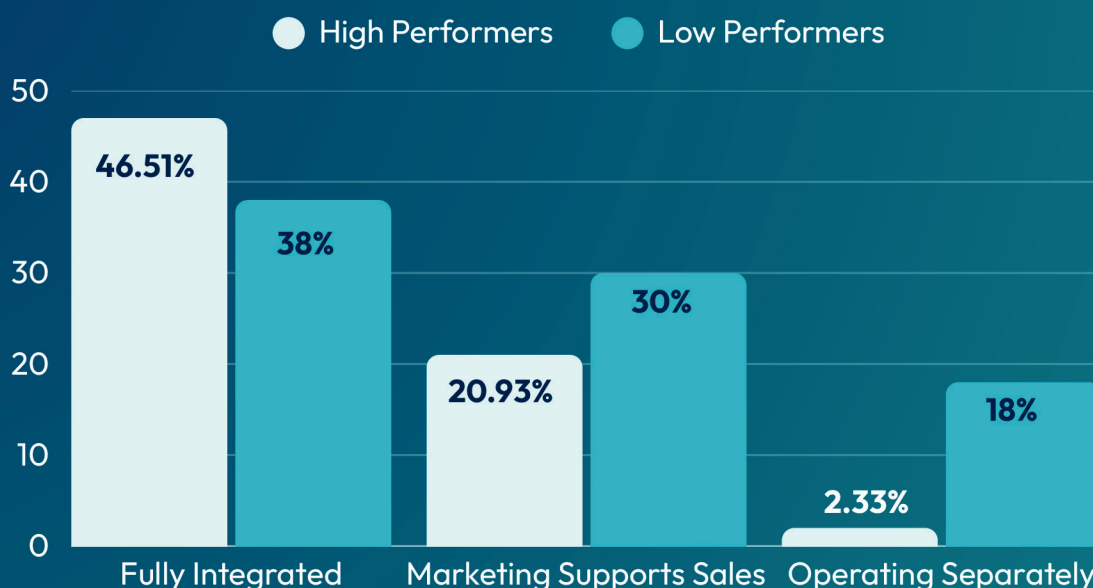
Weekly meetings without shared systems are activity, not alignment. And activity without alignment produces predictable friction.



What High-Performing Teams Do Differently

High-performing firms are far more likely to report fully integrated sales and marketing teams. But integration doesn't mean reporting structure. It means operational structure.

Integration by Performance Level



High Performers (Align structurally in a number of non-negotiable ways)	Low Performers (Tend to look like)
A single CRM that both teams update and reference	Calendar invites
Lead qualification criteria that everyone agrees on and uses	Separate dashboards
Revenue targets that both teams are measured against	Different definitions of "qualified"
Regular feedback loops where marketing sees what closes and sales sees what converts	Frustration

When high performers meet, they're reviewing performance against shared metrics.
When low performers meet, they're negotiating what metrics should matter.

What To Do Next

THE ALIGNMENT TEST

Before you add more meetings to "improve alignment," ask:

- Y | N** Do sales and marketing use the same CRM?
- Y | N** Can both teams see the same pipeline data in real time?
- Y | N** Is there a written definition of a qualified lead that both teams use?
- Y | N** Are both teams measured on the same revenue goal?

If you answered "no" to any of the questions above:

- 1. Put both teams in the same CRM.** If sales uses one system and marketing uses another, you don't have alignment. You have translation layers. One system, both teams, no exceptions.
- 2. Write down your lead qualification criteria.** Not "good fit" or "seems interested." Specific, measurable criteria: revenue size, role, industry, pain point, budget authority. Write it down, get both teams to sign it, and use it consistently.
- 3. Tie both teams to the same revenue goal.** If marketing is measured on MQLs and sales is measured on closed deals, they're optimizing for different outcomes. One shared goal: revenue. Everything else ladders to that.
- 4. Create a weekly feedback loop on what's working.** Marketing needs to see what closes, and sales needs to see what converts early. Build a standing agenda item: "What did we learn this week about what moves deals forward?"
- 5. Stop calling it alignment until the systems match.** If you're still negotiating definitions in meetings, you're not aligned yet. Get the infrastructure right first, then the meetings become useful.

These changes sound simple. In practice, they require facilitation, discipline, and sustained reinforcement to stick.

Insight 3

High-Performing Teams Have “Later” Problems

As firms build visibility and alignment, the nature of their constraints changes.

- Low-performing firms struggle with pipeline volume and conversion
- High-performing firms struggle with capacity, throughput, and delivery limits

Capacity problems only appear once growth is predictable. They are evidence that momentum exists. Pipeline and conversion problems signal that momentum has not yet been established.

This distinction matters because firms often try to copy the behavior of high performers without earning the conditions that make those behaviors effective.

Momentum must be proven before capacity investments make sense.



The Pattern We Saw

When we asked respondents to identify their primary growth bottleneck, the answers clustered around predictable themes: pipeline volume, team capacity, conversion rates, lead quality, and bandwidth.

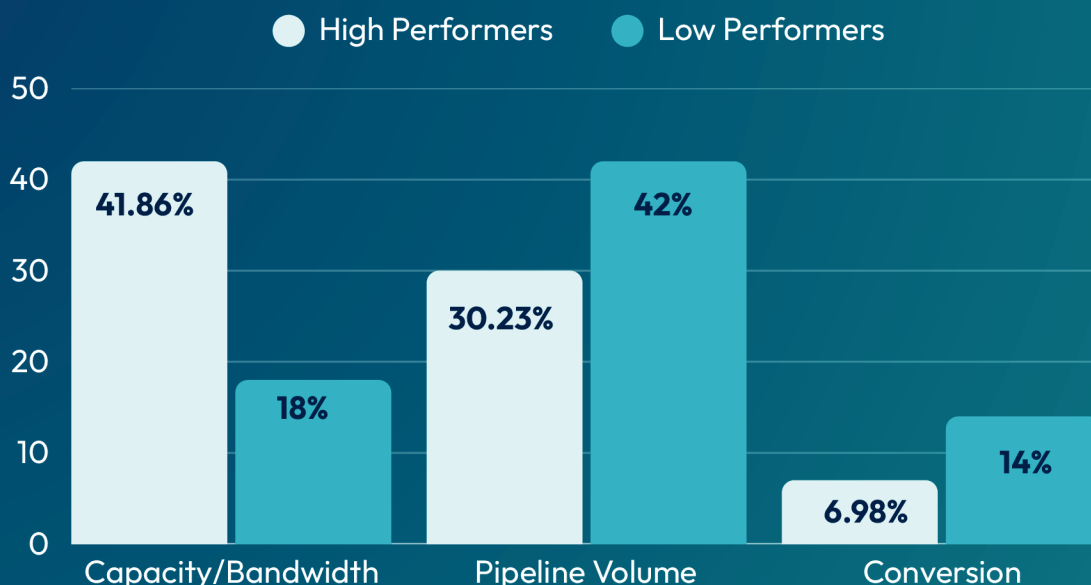
But when we segment by performance, the pattern shifts dramatically.

High-performing teams cite capacity and execution challenges. "We have more opportunities than we can handle." "We need more people to deliver the work." "We're constrained by bandwidth, not demand."

Low-performing teams cite pipeline and conversion challenges. "We need more leads." "Our conversion rates are too low." "We're not getting enough qualified opportunities."

Your primary bottleneck usually reveals what stage of growth you are actually in. Capacity problems appear later. Pipeline and conversion problems appear earlier.

Primary Bottlenecks by Performance Level



What It Actually Means

This isn't just a difference in problems. It's a difference in stages.

Capacity problems are later-stage problems. They appear once demand is predictable and conversion is understood. They signal that the basics are working. You have demand and conversion. Your constraint is throughput, not uncertainty.

Pipeline and conversion problems are earlier-stage problems. They signal you're still building the foundation. You haven't yet established the visibility and repeatability that create momentum.

If you're still solving pipeline problems, you haven't earned capacity problems yet.

This matters because the instinct when growth stalls is to assume you need to do what high performers do: hire more people, invest in capacity, expand delivery. But if you haven't solved the earlier problems, adding capacity just means more people working on an unpredictable system.

Optimization beats expansion when systems aren't ready.



What High-Performing Teams Do Differently

High performers have solved the earlier problems. They're not wondering where their next deal will come from. They're managing volume, timing, and delivery quality.



This doesn't mean they have perfect systems. It means their systems work well enough that the constraint has shifted.

Low performers are still building systems. They're experimenting with channels, refining messaging, and trying to figure out what actually converts. Their bottleneck is **foundational**.

High performers are optimizing systems. They know what works and are trying to figure out how to do more of it without breaking what's already working. Their bottleneck is **operational**.

Same word ("bottleneck"), completely different meaning.

Pipeline	Conversion	Capacity
We don't know what works	We can't repeat what works	We know what works, need more throughput

What To Do Next

THE BOTTLENECK TEST

Before you invest in capacity, ask:

- Y | N** Can we predict how many qualified leads we'll generate next month?
- Y | N** Do we know which channels consistently produce opportunities?
- Y | N** Can we articulate what messaging actually converts?
- Y | N** Do we have repeatable processes for moving deals through the pipeline?

If you answered "no" to any of the questions above:

1. **Stop comparing yourself to companies with capacity problems.** Those companies have solved what you're still solving. Learn from them, but don't copy their playbook. They're playing a different game.
2. **Focus on repeatability before adding activity.** Can you generate one qualified lead reliably? Then do it again. And again. Prove the system works in small doses before you try to scale it. Repeatability creates momentum.
3. **Document what actually converts.** Track which channels produce qualified opportunities. Which messages resonate? Which customer profiles close fastest? You need this data before you can optimize.
4. **Resist the urge to add capacity too early.** Hiring more salespeople or expanding delivery won't fix an inconsistent pipeline. It just means more people waiting for leads that don't come predictably.
5. **Earn the right to have capacity problems.** Capacity problems are good problems. But you earn them by solving pipeline problems first. Infrastructure, then momentum, then scale.

Insight 4

Tools Only Matter When You Use Them

When growth feels constrained, firms look for leverage. Better software. New platforms. Automation. Tools feel like progress because they are tangible.

But tools do not create momentum. They amplify whatever already exists. High- and low-performing firms adopt new tools at similar rates. The difference is utilization. High-performing teams use fewer tools more consistently. Low-performing teams add tools in search of improvement.

When processes are unclear or inconsistent, tools digitize the dysfunction. They make problems faster and louder, not better.

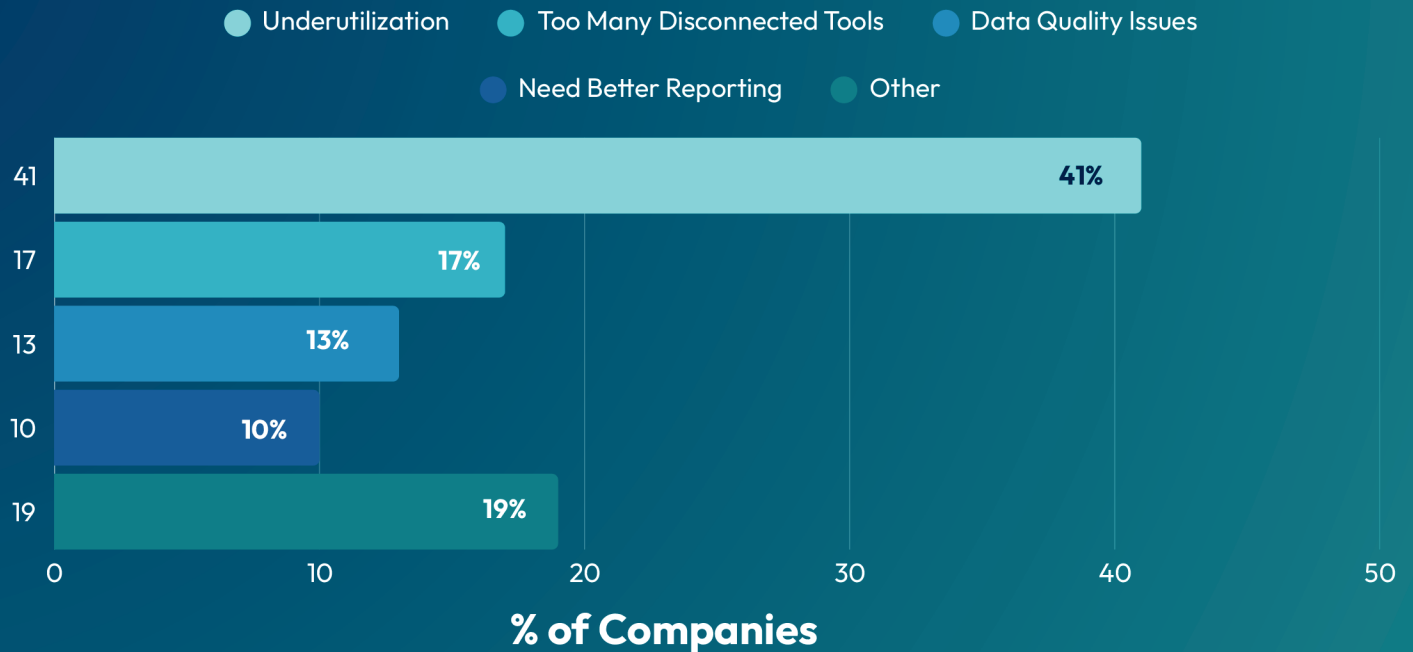
Momentum is built through execution, not adoption. Tools support momentum only when systems are already working.



The Pattern We Saw

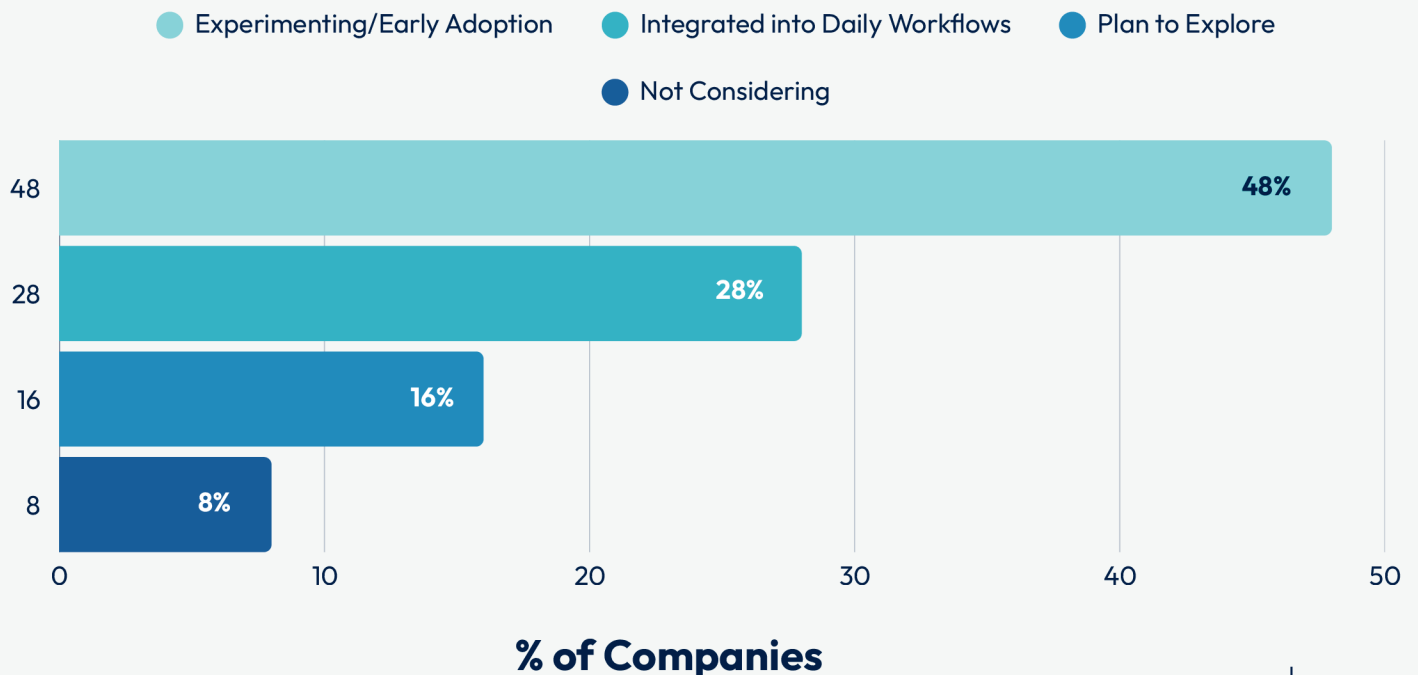
41% of respondents report that their biggest technology challenge is the underutilization of existing tools. Not missing features. Not a lack of integration. Not cost. Underutilization.

Technology Challenges



At the same time, AI adoption is widespread. 76% of firms report either experimenting with AI, integrating it into workflows, or actively using it daily.

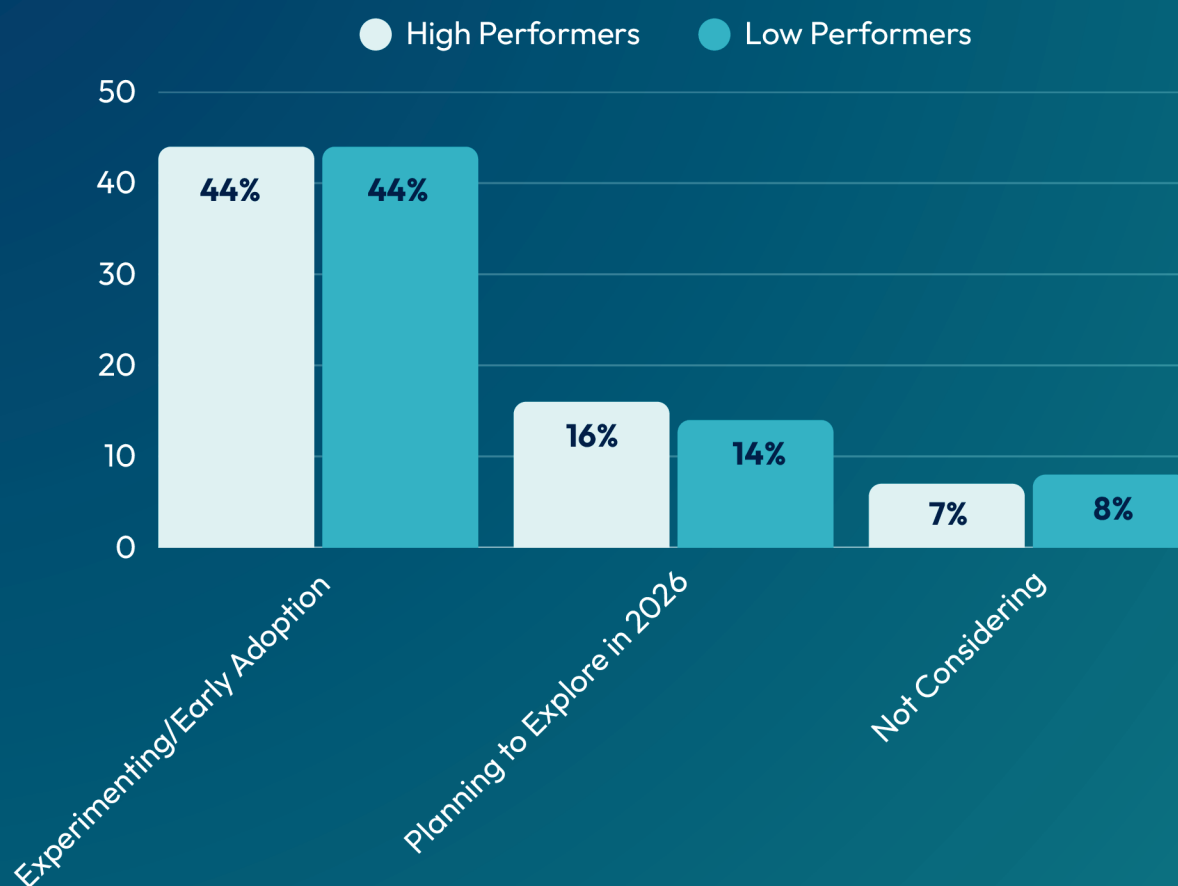
AI Adoption Levels



And here's the surprising part: AI adoption is nearly identical across high- and low-performing organizations. Both groups are experimenting at similar rates.

Both groups are integrating at similar rates.

AI Adoption by Performance Level



So if everyone is adopting new tools at the same pace, but performance diverges, the tools aren't the differentiator.



What It Actually Means

This is the utilization gap. The difference between having a tool and actually using it effectively. Low-performing teams tend to add tools in search of improvement. High-performing teams focus on using fewer tools more consistently.

It's easy to adopt a new platform. You sign up, integrate it, get the team trained, and check the box. But adoption is not the same as execution, and execution is not the same as results.

When processes are broken, adding tools just digitizes the dysfunction. A CRM doesn't fix unclear lead definitions, an AI tool doesn't fix inconsistent follow-up, and marketing automation doesn't fix weak messaging.

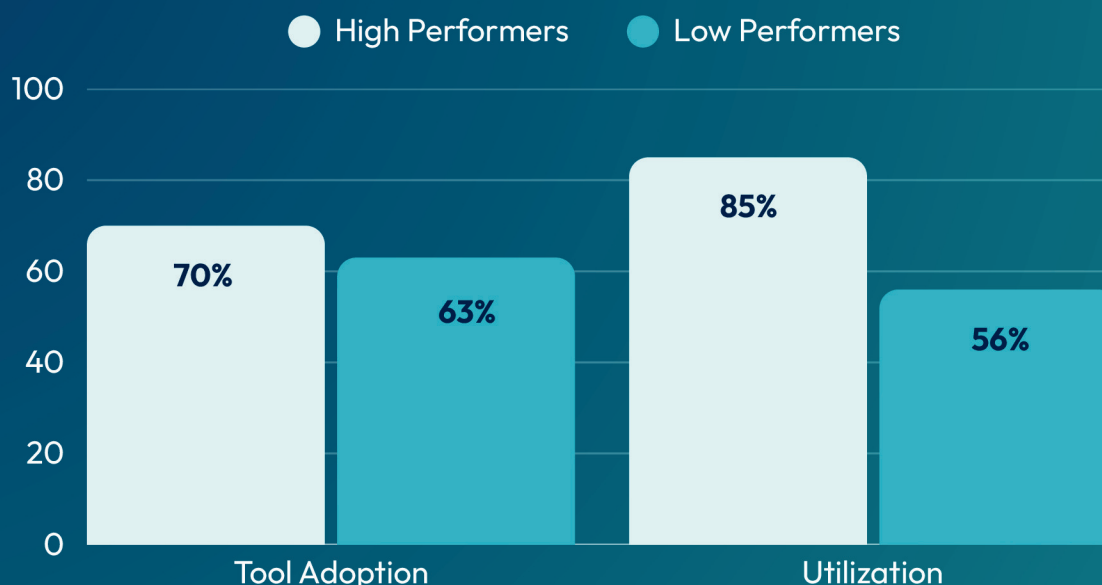
Adding tools to broken processes multiplies problems.

The instinct when something isn't working is to look for a better tool. "Maybe if we had X platform, we could solve Y problem." But tools amplify what you're already doing. If what you're doing is inconsistent, tools make it inconsistently faster.

What High-Performing Teams Do Differently

High performers use fewer tools, better.

Tool Adoption and Utilization



When high performers adopt a tool, they commit to using it. They train the team, build it into workflows, and measure whether it's actually improving outcomes. If it's not, they drop it.

Low performers adopt tools, only to wonder why nothing changes. The tool sits there while half the team uses it and half don't. Data is inconsistent, reporting is incomplete, and six months later, they're looking for the next tool to fix the problem the last tool didn't fix.

The issue isn't the tool. It's the lack of commitment to using it.



What To Do Next

THE UTILIZATION TEST

Before you adopt a new tool, ask:

- Y | N** Are we consistently using our existing tools at least 80% of the time?
- Y | N** Have we documented the process this tool is supposed to improve?
- Y | N** Can we measure whether this tool actually makes things better?
- Y | N** Are we willing to drop this tool if it doesn't improve outcomes in 90 days?

If you answered "no" to any of the questions above:

- 1. Audit what you already have.** List every tool your team is supposed to use. CRM. Marketing automation. Analytics. AI platforms. Then ask: what percentage of the team actually uses each tool consistently? Often, teams are too close to their own workflows to see where friction actually lives, so bringing in an outside perspective tends to help uncover "hidden issues" that are really in plain sight.
- 2. Pick three tools and use them fully.** You don't need ten platforms. You need three that your entire team uses without exception. CRM. Communication. Analytics. Master those before you add anything else.
- 3. Stop adopting tools to fix process problems.** If your follow-up is inconsistent, a new CRM won't fix it. If your messaging is unclear, marketing automation won't fix it. Fix the process first. Then add the tool.
- 4. Measure utilization, not adoption.** Adoption is binary: do we have it? Utilization is a spectrum: does everyone use it? Are they using it correctly? Is it producing better outcomes? Measure that.
- 5. Commit to dropping tools that don't get used.** If your team isn't using a platform after 90 days, kill it. Don't let unused tools pile up. They create noise and make it harder to focus on what actually works.

Insight 5

Investment Follows Clarity

Low marketing investment is often framed as a growth problem.

In reality, it is usually a signal.

Leadership hesitates to invest when the role of marketing is unclear. What is it supposed to deliver? How will we know it is working? What changes if we invest more?

Without clear answers, conservative investment is rational.

High-performing firms invest more not because they are bolder, but because they have momentum. They can see how marketing contributes to business outcomes. They know what changes when they invest.

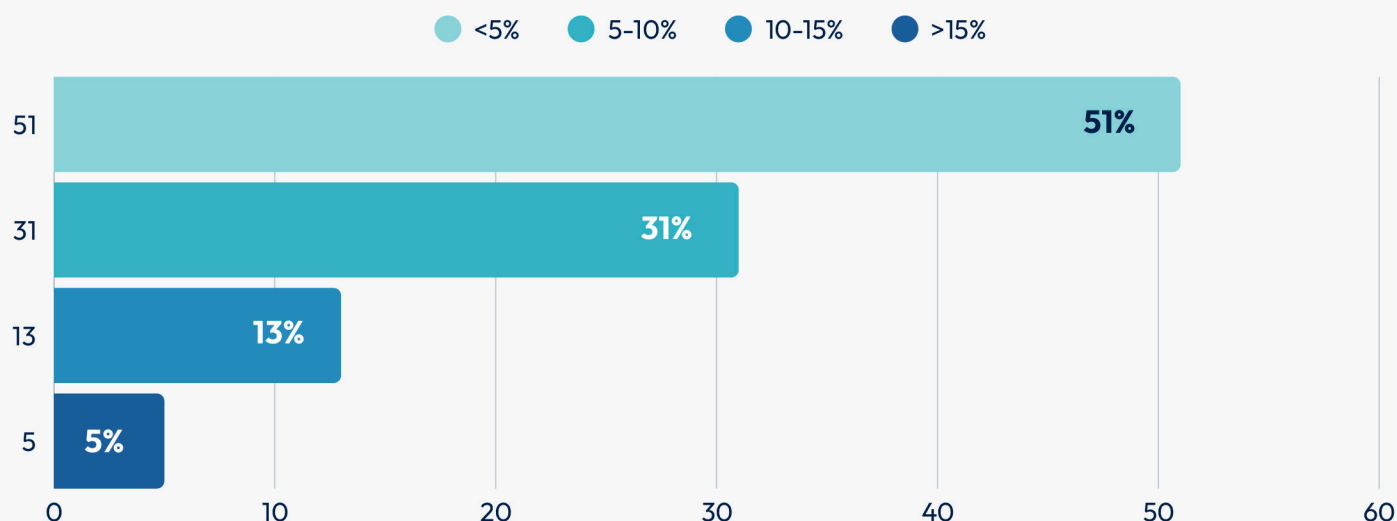
Momentum creates confidence. Confidence unlocks investment.



The Pattern We Saw

51% of respondents spend less than 5% of revenue on marketing. Another 31% spend between 5% and 10%. Only 18% spend more than 10%.

Marketing Budget as % of Revenue



These numbers are nearly identical to last year's survey. Budget levels have not materially changed year over year.

When marketing's role is unclear, conservative investment is a rational leadership decision. On the surface, this looks like underinvestment. And the common narrative is that B2B firms don't spend enough on marketing, which limits growth.

But when we segment by performance, a different picture emerges.

What It Actually Means

Low marketing investment is rarely the constraint. More often, it reflects leadership uncertainty about what marketing is meant to deliver.

When leadership hesitates to increase marketing spend, it's rarely because they don't value marketing. It's because they're not clear on what marketing is supposed to accomplish or how to tell if it's working.

The issue isn't attribution. Marketing's job isn't to track every dollar to a closed deal. Marketing builds awareness, establishes positioning, creates credibility, and generates the conditions that make sales conversations possible. Those things matter, but they don't always show up in a CRM report.

The issue is clarity. What is marketing supposed to do? How do we know if it's working? What would "better" look like?

When those questions don't have clear answers, leadership keeps spend conservative. Not because the ROI isn't there, but because they can't see the connection between marketing activity and business outcomes.

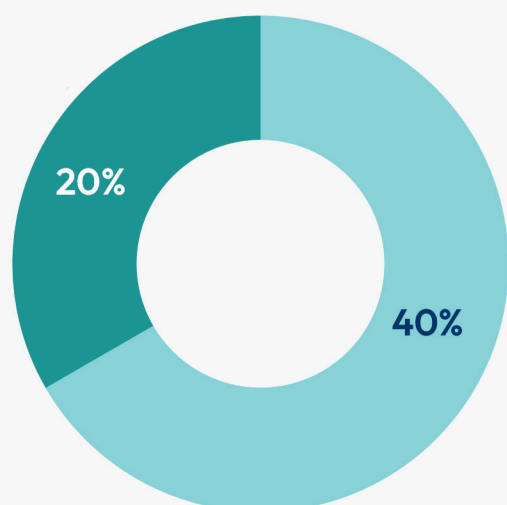
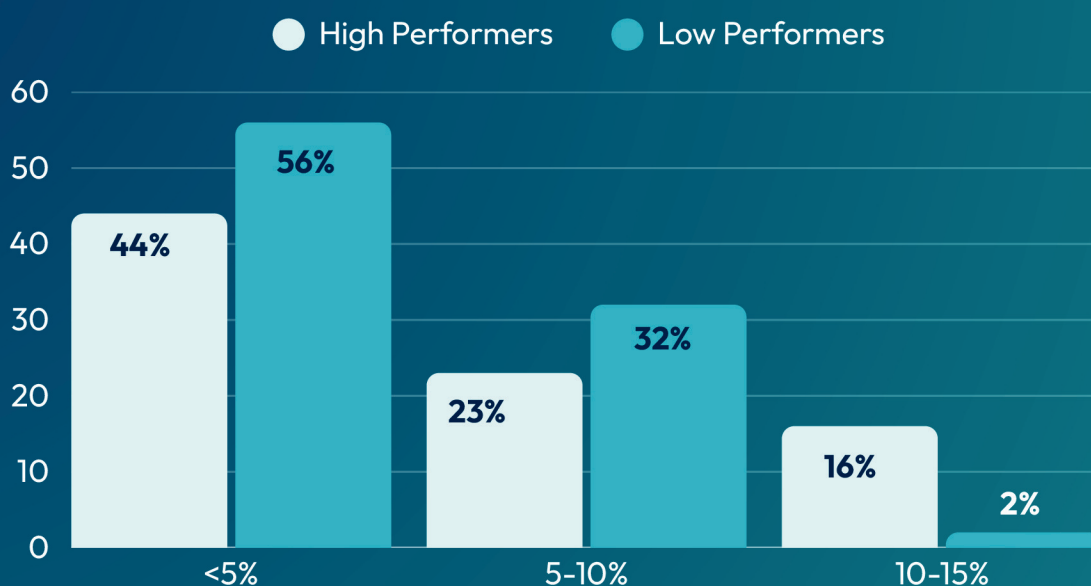


What High-Performing Teams Do Differently

High performers do spend more as a percentage of revenue, but the difference isn't dramatic. What's more telling is their willingness to increase investment when they see momentum.

56% of low performers spend under 5% of revenue on marketing, compared to 44% of high performers. And 16% of high performers invest 10-15% of revenue in marketing, compared to just 2% of low performers.

Budget Allocation by Performance Level



● Low Performers

● High Performers

Plans to Increase Marketing Investment

But here's what matters more: 40% of high performers plan to increase their marketing budget, compared to 20% of low performers.

High performers aren't just spending more. They're willing to invest more as momentum builds.

What To Do Next

THE CLARITY TEST

Before you request a budget increase, ask:

- Y | N** Is it clear what marketing is supposed to accomplish this year?
- Y | N** Can we show how marketing is contributing to business outcomes (not just activity metrics)?
- Y | N** Do we know which marketing investments are moving the numbers that matter most?
- Y | N** Can we articulate what additional investment would accomplish and how we'd measure it?

If you answered "no" to any of the questions above:

- 1. Define what marketing is responsible for.** Tie it to specific business outcomes: shorter sales cycles, higher win rates in target accounts, entry into a new segment, or support for a new service line. Be explicit about what success looks like.
- 2. Choose 3–5 business metrics that reflect progress.** Not vanity metrics. Track indicators like qualified pipeline from target accounts, deal size, sales cycle length, competitive win rate, or percentage of revenue from ideal customers.
- 3. Connect activity to outcomes.** Show how marketing is changing sales conversations, inbound lead quality, or deal velocity. Make the relationship between effort and impact visible.
- 4. Reframe the investment conversation.** Stop asking for budget increases. Start showing what's possible. Instead of requesting spend, outline expected changes in pipeline quality or deal speed based on what has worked elsewhere.
- 5. Build visibility into contribution.** You don't need perfect attribution. Track leading indicators that show whether marketing is strengthening the revenue engine.

Bringing it Together

Across all 5 insights, one misconception appears repeatedly: that more activity will eventually create growth, and growth will eventually justify scale.

The data shows the opposite.

Momentum comes first. Momentum proves that growth is real, repeatable, and supported by systems. Scale is not the way to create momentum. It is the reward for having it.

HIGH PERFORMERS AREN'T DOING MORE:

- ✓ They use tools fully instead of adopting tools constantly
- ✓ They show how marketing contributes to business outcomes before requesting more investment
- ✓ They build structural alignment, not performative alignment
- ✓ They solve early problems before earning later problems
- ✓ They establish momentum before they attempt scale

LOW PERFORMERS ARE DOING THE OPPOSITE:

- ✗ They add activity before building infrastructure
- ✗ They confuse meetings with alignment
- ✗ They chase capacity solutions while still solving pipeline problems
- ✗ They adopt new tools, hoping to fix broken processes
- ✗ They request budget without demonstrating returns



The path forward isn't more. It's better.

For most firms, better means building the operational systems that create momentum: visibility into what works, repeatability in execution, and clarity about what drives results. These systems reduce reliance on heroics and make growth predictable.

Momentum rarely happens by accident. It happens when firms intentionally build the infrastructure that makes growth repeatable, then resist the pressure to scale before that foundation is solid.

Momentum is not accidental. It's built.

OTM builds revenue systems for professional services and B2B firms, the kind of infrastructure this report describes.

If you're trying to figure out where momentum exists in your business, where it doesn't, and what to focus on next, we can help.

Appendix

Methodology

This report is based on a survey of 161 B2B leaders conducted in late 2025. Respondents represent professional services firms, SaaS companies, and consulting businesses across various industries and revenue stages.

Performance Segmentation:

- High performers: Revenue results better than expected AND improved pipeline quality (32% of sample, 43 companies)
- Low performers: Revenue results that did not exceed expectations AND no improvement in pipeline quality (37% of sample, 50 companies)
- Middle performers: Met one but not both criteria (31% of sample, 70 companies)

Sample Characteristics:

- 39% have 1-10 employees
- 29% have 11-50 employees
- 17% have 51-200 employees
- 14% have 200+ employees
- 57% are under \$5M in annual revenue
- 23% are between \$5-25M
- 20% are \$25M+

About OTM

OTM builds revenue systems for professional services and B2B firms. We help companies move from inconsistent lead generation to predictable growth by engineering the sales and marketing infrastructure that actually drives revenue.

Our clients stop wondering where the next client will come from and start running systematic plays that work.