FRONTIER REVENUE

State of the **Frontier**

The Q2 2026 report for RevOps, Enablement, and sales leaders — what shipped, what the data says, and what to hand the rest of your org.

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THE ONE THING TO KNOW

The revenue stack became agent-native this quarter — and standardized on one protocol.

Gong,[1] Salesforce,[2] HubSpot,[3] and Apollo[4] all shipped agent capabilities built on the Model Context Protocol (MCP) in the same quarter. The tools are now agent-ready. The analyst data is just as clear on what happens next: the teams that win don't have better models — they redesign the work around the freed-up time. Gartner found AI now saves sellers close to five hours a week, and that **72% of sales organizations reinvest none of it** into higher-value work.[13] The frontier this quarter isn't the technology. It's the operating model.

This report is built to be handed out. Read the trends yourself, then pass each section to the person who owns it. Every claim carries a numbered link to a live source; where a figure is secondary or sits just outside the quarter, we say so.

PART 1

The five trends that defined Q2 2026

1 The revenue stack went MCP-native.

The cleanest pattern of the quarter: the major platforms adopted a shared way for agents to reach tools and data. Gong built its new Revenue Harness on MCP support.[1] Salesforce shipped Tableau MCP so agents query analytics directly.[2] HubSpot rebuilt its Breeze agents to be MCP-powered.[3] Apollo expanded its MCP server so agents read and write custom fields.[4] "Connect an agent to the revenue stack" stopped being a custom project and started becoming a standard.

2 The platforms moved from recording to executing.

Gong launched "Mission Big Dipper" and unveiled the Revenue Harness on June 24 — an agentic execution layer that governs and orchestrates agents across the revenue cycle, with Custom Agents RevOps can build without engineering.[1] Salesforce brought Agentforce Multi-Agent Orchestration to general availability on June 15.[2] The category converged on a hard truth: an agent that only summarizes is a feature; an agent that acts is a system. The word doing the heavy lifting in every launch was **governance**.

3 AI's return on investment split into two camps.

Gartner's May research put a number on it: only 25% of sales organizations report a 50%-or-better return on their AI, while 20% report a 50%-or-worse *negative* return.[14] Adoption is no longer the achievement — BCG found 74% of frontline workers now use AI weekly or daily.[17] The gap between winners and losers is organizational, not technical. Companies with a clear AI strategy saw about 25 points more impact than those relying on better tools alone.

4 The buying committee kept growing; cycles kept compressing.

Forrester's flagship Q2 thesis — the "GTM Singularity" — argues AI-enabled buyers and their agents are collapsing traditional go-to-market. The structural cause is measurable: a typical B2B decision now involves 13 internal stakeholders and 9 external influencers.[18] Meanwhile ICONIQ data shows average sales cycles fell from about 25 weeks in the first half of 2025 to about 19 in the second.[19] More people to convince, less time to convince them.

5 Consolidation began in earnest.

Salesforce spent the quarter agreeing to buy the missing pieces of the agentic stack: Fin for AI customer service (~$3.6B, June 15), Contentful for an agentic content layer (June 1), and m3ter for usage-based metering (June 8).[5] The signal underneath the shopping list: the pricing of AI is shifting to consumption and outcomes, and the platforms are buying the infrastructure to bill for it.

PART 2 · HAND THIS TO YOUR CFO

What to share with your CFO

The metrics, the risk, and the honest ROI picture a finance leader needs to rate the revenue org.

The productivity is real, but it leaks.

Gartner found AI saves sellers nearly five hours a week (about 4.8). The catch: 72% of organizations reinvest none of it into high-value work. The ones that do were 2.2x more likely to exceed customer-growth goals.[13] This reframes the question from "are we buying AI?" to "can we show where the saved hours went?"

The ROI is bimodal — treat it that way.

Per Gartner, 25% of sales orgs see a strong (50%+) return on AI and 20% see a strongly negative one; 31% of chief sales officers named proving AI ROI a top challenge for the year.[14] The finance move is not to cut AI spend — it's to govern it like a portfolio: fund the workflows that show measurable return, kill the ones that don't.

Headcount leverage is the clearest efficiency story.

ICONIQ's "Modern GTM Org" data shows AI-forward teams generating roughly 2x the net-new ARR per GTM employee of low-adopters (about $640K vs $370K), and running teams 20–30% leaner at the same revenue band.[20] This is the number that turns "AI strategy" into a budget conversation: same output, fewer people — or more output from the same people.

The macro backdrop, briefly.

Private SaaS growth has decelerated (SaaS Capital puts median private B2B SaaS growth near 26%, down from 30% in 2022, with net revenue retention compressing toward 101%).[21] Bain found 42% of companies missed 2025 growth targets, up from 32% — even as 91% remain confident about 2026.[22] That confidence-versus-execution gap is the environment every AI investment is judged in.

One risk for the CFO's radar.

Forrester has predicted B2B companies will lose more than $10B in enterprise value from ungoverned generative-AI use.[23] Governance isn't a cost center here — it's what stands between an AI program and a headline.

> *A note on one famous number:* You'll hear that "95% of enterprise AI pilots fail" (MIT NANDA, 2025).[29] The precise finding is that ~95% show no measurable P&L return, and the methodology has been publicly contested. Use it as a caution, not a law.

PART 3 · HAND THIS TO YOUR REVOPS LEADER

Owning the control plane

The quarter handed RevOps a new mandate: govern the agents, not just the data.

Governance became RevOps's job.

Gong's Revenue Harness ships "Custom Agents" that let RevOps build and deploy governed agents without engineering.[1] Across every launch this quarter the operative word was governance — who can run what, on which data, at what cost. That control plane is RevOps's to own. The team that spent a decade governing fields and stages now governs autonomous actions.

The data-hygiene tax is finally addressable.

Salesforce's Momentum captures calls, emails, and meetings and writes structured data back to the CRM in real time;[2] HubSpot's Smart Deal Progression reads transcripts and deal history to update deals automatically.[3] The manual-entry burden RevOps has fought forever is now a solvable problem — which frees the function to move from data janitor to strategy.

Next-best-action is where AI correlates with growth.

Gartner found organizations that provide AI-enabled next-best-actions are 2.6x more likely to achieve commercial growth.[15] Generic AI adoption doesn't move the number; in-workflow guidance does. Wiring the right signal to the right action at the right moment is a RevOps build, not a vendor purchase.

The spine decision: CRM plus warehouse, governed as one.

Salesforce and Databricks announced bidirectional federated search on June 16, letting agents query the warehouse and the CRM as one surface (rolling out through the second half of 2026).[8] RevOps owns the architecture call — whether your system of record and your warehouse become a single governed context for agents, or stay silos that agents only amplify.

Re-examine the enrichment stack.

ZoomInfo (now trading as "GTM") cut guidance and restructured roughly 20% of its workforce this quarter as AI-native enrichment pressures the incumbent data model.[25] It's a prompt for RevOps to re-evaluate what you pay for data — and whether an agent that researches on demand changes the math.

> One control to get right: agents inherit the permissions of the role they run under. An over-permissioned role becomes an over-permissioned agent. Least-privilege role design is now a RevOps task, not just an IT one.

PART 4 · HAND THIS TO YOUR ENABLEMENT LEADER

Enabling the rep the buyer already out-researched

Buyers now arrive informed by AI. Readiness and coaching have to change with them.

The rep's job shifted from informing to validating.

Gartner found 69% of B2B buyers now turn to sales reps to validate AI-generated insights.[16] The buyer often knows the product basics before the first call. Enablement's new charter is training reps to add what AI can't — judgment, context, and trust — rather than reciting what the buyer already read.

The first call is validation, not discovery.

With buying committees arriving informed and opinions already formed,[18] the traditional discovery-first call is being rebuilt as a validation conversation. That's a methodology change, and methodology is enablement's to redesign — the early-stage playbook from a year ago no longer matches how buyers show up.

Own the reinvestment of the freed-up hours.

AI saves sellers close to five hours a week, and 72% of organizations reinvest none of it.[13] The teams that did redirect that time were 2.2x more likely to beat customer-growth goals. Deciding where those hours go — and building the habits that put them there — is an enablement job, and it's where the ROI actually lives.

Coaching can scale, once you define "good."

Agentic coaching reached production this quarter, with Gong shipping AI coaching inside its governed Revenue Harness.[1] Agents can coach every rep on every call — but only against a standard someone defines. Enablement's leverage is encoding what a great call looks like into the scorecard the agent grades against; the agent scales it, but the judgment is yours.

The next frontier: enable reps to build.

ICONIQ's data shows the strongest teams turning top reps into internal tool-builders rather than simply adding headcount.[20] That reframes enablement's remit — from certifying reps on a pitch to helping them build with AI. The teams that win are re-orging around who can build, and enablement is how that capability spreads.

PART 5 · HAND THIS TO YOUR IT / DATA LEADER

Securing the stack before you scale agents

What actually became feasible this quarter — and what to lock down first.

MCP got an enterprise front door.

On June 18, the Model Context Protocol's Enterprise-Managed Authorization extension reached stable status. It provisions agent access to tools through your existing identity provider — connected on first login, no per-app OAuth grind. Okta ships as the first supported IdP; Anthropic, Microsoft, and VS Code are early clients.[6] This is what makes agent-to-tool access governable through one auditable trail instead of thousands of consent screens.

The data platforms reframed themselves as governed context.

At Snowflake Summit (June 1–4) and Databricks' Data + AI Summit (mid-June), the message matched: agents are only as good — and as safe — as the governed context they can reach. Both shipped per-agent identity, permissions, and audit trails.[7] Salesforce and Databricks extended their partnership on June 16 with bidirectional federated search.[8] "CRM-as-spine plus warehouse" stopped being a diagram and started shipping.

Identity for agents became a platform default.

Okta for AI Agents reached general availability on April 30, treating agents as first-class non-human identities.[9] Microsoft's Entra now auto-creates an identity for agents built in its stack.[10] The corollary is the risk: any agent *not* created through a governed platform is an ungoverned credential your audit will miss.

The new attack surface is the tool, not just the prompt.

Researchers disclosed large numbers of exposed MCP instances this quarter and flagged "tool poisoning," where a malicious tool description executes on every invocation; prompt injection remained the dominant agentic failure mode in production. *(These figures come from secondary security reporting — treat the pattern as confirmed and exact counts as directional.)* The rule for a GTM agent that reads inbound email and can call tools: allow-list and validate the tools it can reach — the protocol won't do it for you.

The reality check on "agents everywhere."

The most consistent production finding of the quarter is a large pilot-to-production gap — most agent pilots do not scale org-wide, per widely reported analyst data. The blockers are evaluation, governance, and reliability: precisely what an IT and data leader controls. Build those in from day one and you're building for the minority that reaches production.

Two dates for the compliance calendar.

The EU AI Act's enforcement powers for general-purpose AI — including fines — begin August 2, 2026, making Q2 the last clean prep window. A US executive order on June 2 added a (voluntary) cybersecurity framework for frontier models.[12] The universal action: inventory your AI systems, assign ownership, and document where they run.

PART 6 · HAND THIS TO YOUR GTM ENGINEER

The role, and what shipped to build with

The features this quarter that a builder can actually build on.

"GTM engineer" is now a hiring category.

By one vendor analysis, listings for the role topped roughly 3,000 by early 2026 with reported ~205% year-over-year growth, and compensation from about $132K to $241K-plus, with a premium for people who can build and govern agent workflows.[24] *(Vendor-aggregated — treat the exact figures as reported, not audited.)* The signal is real regardless of the decimal: the person who builds on your revenue stack is now a defined job.

The features that shipped are builder-first.

HubSpot's Spring Spotlight (April 14) rebuilt the Breeze Prospecting Agent to run the full lifecycle — signal detection, list build, personalized outreach, meeting booking — and made Breeze agents MCP-powered, connecting to a wider third-party tool ecosystem.[3] Salesforce's Summer '26 shipped Tableau MCP, letting agents query analytics through the trust layer, plus Momentum for real-time activity capture.[2] Apollo expanded its MCP server in June so agents read and write custom fields, and shipped a CLI.[4]

Gong's Harness is the one to study.

The Revenue Harness (June 24) lets a builder encode a winning-deal blueprint and route work across autonomous agents, human approval, and CRM write-backs — with role-based access and cost governance built in.[1] It's the clearest example of the quarter's real lesson: the value isn't the agent, it's the governed loop the agent runs inside.

The build-versus-buy story is showing up in the wild.

Practitioner reports this quarter describe teams collapsing five or more GTM tools into a single prospect-to-coach agent, and Deloitte's 2026 predictions name the SaaS-meets-agents shift as a macro trend, not startup folklore.[28] *(The individual case studies are vendor- and community-authored — compelling as direction, not audited proof.)* The through-line: winning teams are re-orging around who can build with AI, not simply buying more of it.

PART 7

Major news, at a glance

Mergers & acquisitions

Salesforce agreed to acquire Fin (AI service, ~$3.6B, June 15), Contentful (agentic content, June 1, price undisclosed), and m3ter (usage metering, June 8) — definitive agreements expected to close in later quarters.[5] Adobe closed its acquisition of Semrush in late April. *(Adobe/Semrush figures via aggregator — confirm against a primary release before quoting a number.)*

Going public

No pure-play GTM or RevTech vendor filed an S-1 or went public in Q2 2026 that we could verify. The IPO-track filings in the window were foundation-model labs — OpenAI and Anthropic both signaled confidential filings — not GTM tooling. ZoomInfo, now trading under the ticker "GTM," reported Q1 results May 11 with revenue of $310.2M, cut full-year guidance, and disclosed a roughly 20% workforce restructuring — a bellwether for the data-provider category under pressure from AI-native enrichment.[25]

Funding

The AI capital environment stayed historically hot: global venture funding hit a record ~$510B in the first half, with more than 70% of Q2 startup capital going to AI.[26] Revenue-agent startups drew notable rounds — Actively ($45M Series B, April 28), Attention ($30M Series B, June 24), and Sprouts.ai ($9M Pre-Series A, May 15) — every one positioned on agents that *act*, not just record.[27]

PART 8

Up-and-coming vendors to watch

The bar for this list: AI-agent-native revenue tooling (software that executes GTM work, not just supplies data), roughly post-seed through Series B, with a funding round, named logos, or a disclosed traction milestone in the trailing ~12 months — and a clear tie to the autonomous-revenue thesis.

Actively — persistent per-account AI agents; ~$68M raised, enterprise logos including Ramp and Samsara. The standard-bearer for account-level agents.

Attention — autonomous revenue execution; 20M+ agent actions a month, moving upmarket. Conversation intelligence pivoting to action.

Sprouts.ai — data-differentiated revenue agents, Accel-backed, targeting global enterprises. A data-layer-first challenger.

Common Room — AI-native GTM signal intelligence used by Anthropic, Snowflake, and Notion. *(Zoom announced intent to acquire it in mid-July — just outside this quarter — a sign the category is consolidating.)*

Clay — the platform most associated with the GTM-engineer movement; reached $100M ARR in late 2025 and now runs structured GTM-engineering education. The talent pipeline for the role.

A CHALLENGE FOR THE LEADERSHIP TEAM

Pick the one bet your team will make this quarter to land in the top 25% — reinvest the time AI frees up, give agents governed authority to act, or staff to build. Then decide what you'll stop to make room for it.

Sources

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