

The Human-AI Revenue Operating System

The New Revenue Organization: RevOps, AI Ops, customer ownership, and the sales roles of the future

01

Revenue Motions

02

Customer Ownership

03

Commercial Intelligence

04

Human-AI Workflows

05

Governance & Economics

What is in this playbook

PART I · EXECUTIVE PLAYBOOK

- 00 How to read this playbook
- 01 Executive thesis
- 02 The Human-AI Revenue Operating System
- 03 Recommended organization design
- 04 RevOps and AI Ops
- 05 Where AI fits in every role
- 06 Practice example: hybrid AI architecture

CONTINUED

- 07 Design principles
- 08 Workforce transition
- 09 How the organization evolves
- 10 Implementation toolkit
- 11 Management cadence and scorecard
- 12 90-day activation plan

PART II · ROLE LIBRARY

- 13 Eleven future-state commercial roles

EVIDENCE DISCIPLINE

Four kinds of content are intentionally separated

What we heard	Summarizes the Growth Room Exchange discussion.
Revenue Room™ POV	Our interpretation of what the discussion means.
Recommended design	A proposed future-state model.
Practice example	A company example from the discussion. Not an independent audit.

WHAT THIS PLAYBOOK DOES

- Gives revenue-critical executives a practical model for redesigning the commercial organization.
- Defines how Revenue Operations and AI Operations divide responsibilities and work as one spine.
- Shows where AI fits in every commercial role without obscuring human accountability.
- Offers reporting-line options based on business context, not a single universal chart.

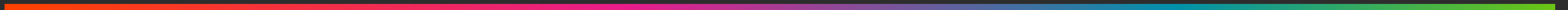
WHAT IT IS NOT

- An assertion that every company should use the same titles, lines, or stack.
- A claim that AI replaces judgment, relationships, or executive accountability.
- A software-selection guide.

01

Executive Thesis

The commercial organization must be redesigned as a system — not a sales department with more automation.



A customer-and-value operating system, not a sales department

The next revenue organization coordinates demand, acquisition, retention, expansion, pricing, profitability, data, and AI across the full revenue lifecycle.

The Growth Room Exchange exposed a recurring pattern: companies added dashboards, specialist sellers, customer-success teams, automation, and AI agents while leaving the operating model unchanged. The result is more capability but not always more coordination.

REVENUE OPERATIONS

Makes the revenue system trustworthy

Definitions, economics, process, ownership, data quality, capacity, forecasting, and operating cadence.

AI OPERATIONS

Makes the revenue system intelligent

Agents, automation, prediction, workflow redesign, adoption, quality, model operations, and value realization.

THE LINK

Neither function should operate independently. Their shared product is the commercial workflow.

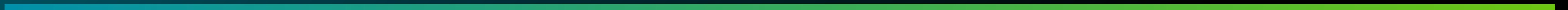
Seven themes from the Growth Room Exchange

- 01 Data availability has improved faster than the organization's ability to act on it.
- 02 Acquisition, retention, and expansion are different motions and should not be managed as interchangeable selling activity.
- 03 Existing-account growth breaks down when ownership, specialist participation, and compensation rules are unclear.
- 04 Leading indicators are needed early enough for management intervention.
- 05 Profitability, cost-to-serve, and delivery feasibility must enter the sales process before commitments are made.
- 06 AI experimentation is widespread, but workflow integration, adoption, governance, and measurable value remain uneven.
- 07 RevOps is becoming the commercial operating architecture, not merely the CRM and reporting team.

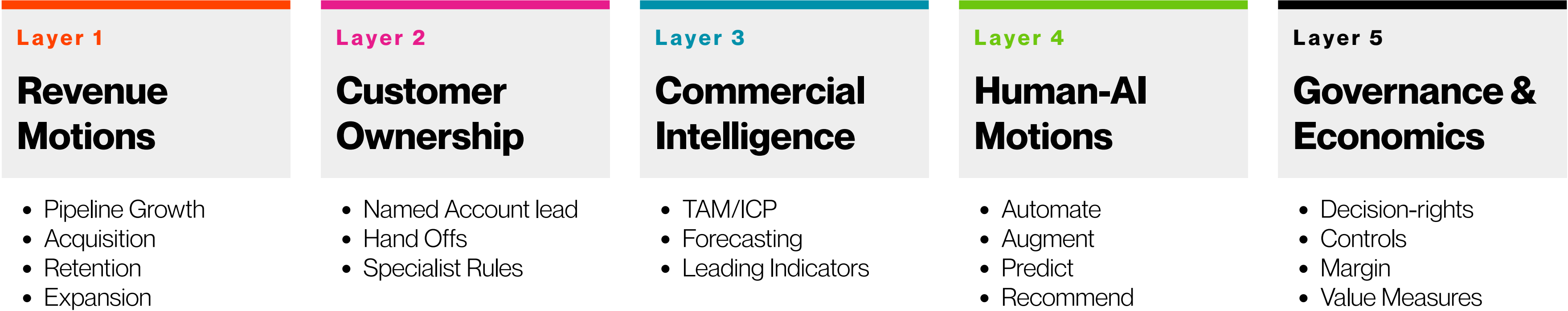
02

The Human-AI Revenue Operating System

Five connected design layers. A company can improve one layer, but durable performance requires all five.



Five Layers of the Revenue Room™ Operating System



Commercial intelligence and human-AI workflows span the entire lifecycle. They do not belong to one stage or one function.

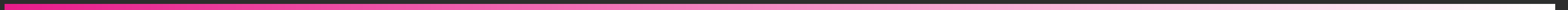
What each layer requires

Revenue motions	New business, retention, and expansion require different talent, evidence, incentives, and cadences. They share an account and data architecture without collapsing into one generic sales job.
Customer ownership	The customer should experience one coordinated company. A named account leader orchestrates specialists, product, customer success, and executives. Internal territory cannot create external confusion.
Commercial intelligence	TAM, ICP, customer value, pipeline, usage, renewal, margin, capacity, and profitability connect into decision-ready signals.
Human-AI workflows	AI is embedded at specific decision points. It removes low-value work, improves judgment, and increases response speed without silently taking over high-consequence decisions.
Governance & economics	Every workflow needs an owner, approved data, human-review rules, quality standards, adoption measures, and an explicit economic hypothesis.

03

Recommended Organization Design

Growth Operations sits close to the executive accountable for revenue quality and customer economics.



A future-state revenue organization

CHIEF GROWTH OFFICER/COMMERCIAL OFFICER

GROWTH OPERATIONS

REVENUE OPERATIONS

Data model • definitions • forecasting • economics

One roadmap. One workflow.
One value scorecard.

AI OPERATIONS

Agents • workflow design • adoption • value

DEMAND CREATORS

Marketing & Demand Creation Engine
Inbound Demand
Outbound Demand
Lifecycle Marketing

REVENUE PRODUCERS

New Business
Account Growth
Enterprise Accounts
Speciality Overlays

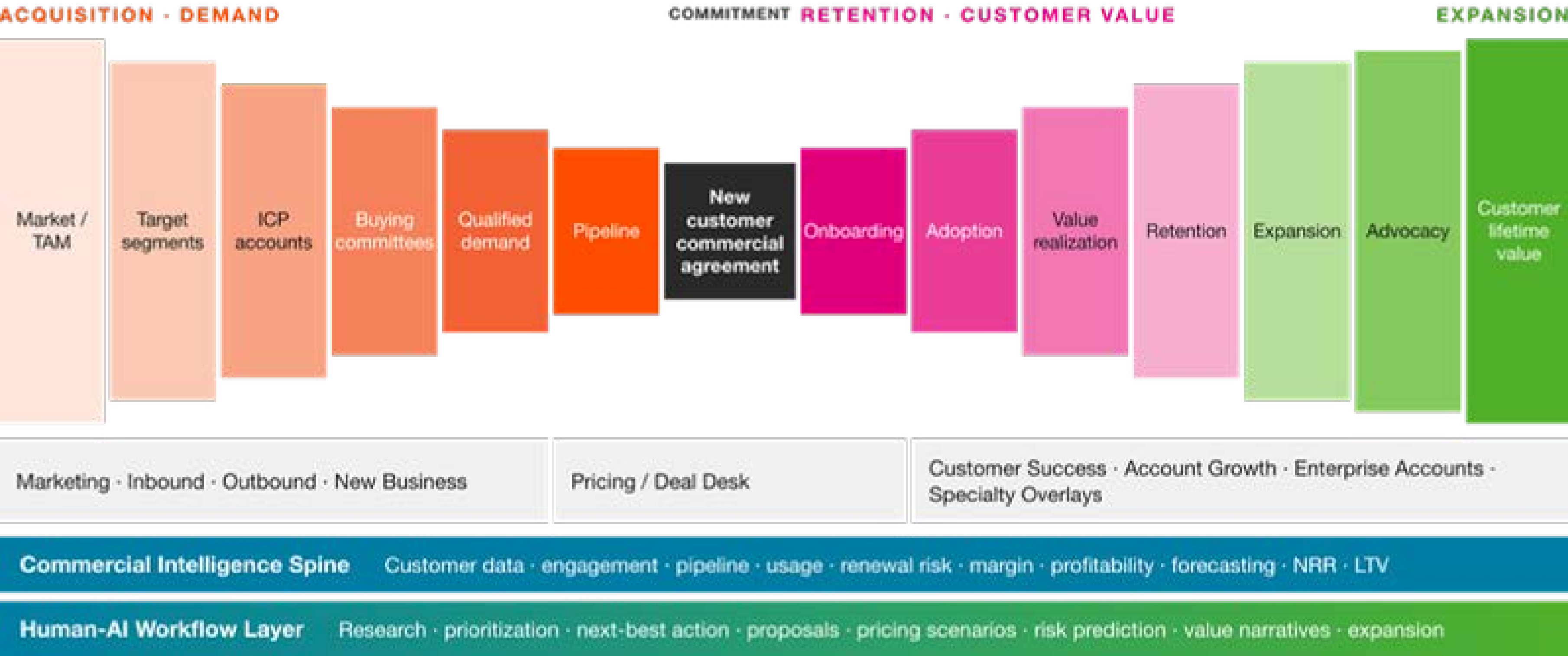
CUSTOMER SUPPORT

Customer Success
Revenue Enablement
Pricing/Deal Desk

SHARED SERVICES

Product	Data	Audience
Tech/AI	Finance	
Legal	Security	
HR		

The bowtie replaces the funnel as the organizing model



Reporting lines should follow economic accountability

BUSINESS CONTEXT	REVOPS	AI OPS	EXECUTIVE ANCHOR
Mid-market, commercially led	Solid line to CCO/CGO	Solid line to CCO/CGO or Head of Growth Ops	CCO / Chief Growth Officer
Enterprise with central AI platform	Solid line to CCO; strong CFO/CIO partnership	Solid line to Chief AI/Data/Technology; embedded commercial AI lead	Joint CCO + CAIO/CDO governance
Margin-intensive or deal-complex	CCO or COO; pricing may report to CFO	Commercial AI lead close to CCO with central controls	CCO + CFO
Product-led recurring revenue	CCO/COO with strong product partnership	May sit in Product/AI platform with dedicated GTM ownership	CPO + CCO shared model
Service-heavy retention model	RevOps under CCO/COO	AI Ops under Growth Ops or enterprise AI	COO or CCO, depending on NRR accountability

Reporting lines should follow economic accountability, workflow ownership, and enterprise risk — not fashionable job titles.

REVENUE ROOM™ POINT OF VIEW

Do not place commercial AI entirely inside IT by default

IT, security, legal, data, and architecture must govern enterprise controls.

But business workflow ownership, adoption, and value realization should remain close to the executive accountable for growth, margin, retention, and customer outcomes.

04 RevOps and AI Ops: Two Functions, One Operating Spine

Two disciplines with one shared product: the commercial workflow.

One shared product: the commercial workflow

REV OPS

Makes the system trustworthy

- Commercial data model, definitions, CRM, hierarchy
- TAM, ICP, segmentation, territories, quota, capacity
- Pipeline governance, forecasting, leading indicators
- NRR, LTV, cost of sales, customer profitability, unit economics
- Pricing analytics, compensation insight, performance

SHARED OPERATING LAYER

The commercial workflow

- One prioritized backlog tied to business outcomes
- Joint use-case intake and business case
- Common release, adoption, and value reviews
- Shared enablement and change plan
- Closed-loop learning from field outcomes

reciprocal

AI OPS

Makes the system intelligent

- Agent, model, prompt, and automation portfolio
- Workflow redesign and human-AI task allocation
- AI training, testing, monitoring, human review, quality controls
- Usage, reliability, value, risk, and agent retirement
- Build-buy-integrate architecture and lifecycle

LIFECYCLE Define → Prioritize → Govern → Launch → Adopt → Measure → Improve or retire

Training: AI & Humans

How a workflow moves from definition to value

- 01 RevOps defines the process, data standard, decision point, owner, and economic baseline.
- 02 AI Ops determines whether AI should automate, augment, predict, recommend, monitor, or do nothing.
- 03 The business owner validates customer impact and operational usefulness.
- 04 Technology, data, legal, privacy, and security approve architecture and controls.
- 05 Revenue Enablement embeds the workflow into role expectations, manager coaching, and practice.
- 06 RevOps and AI Ops jointly measure adoption and business impact, then scale, revise, or retire.

JOINT OPERATING METRICS

Business effect · revenue created or protected, margin, conversion, NRR, cycle time, cost avoided

Workflow effect · task completion, time returned, response speed, error rate, handoff quality

Adoption · active use by role, repeat use, manager reinforcement, exception rate

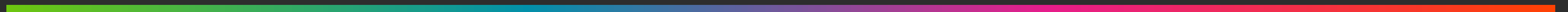
AI quality · reliability, accuracy, grounding, drift, escalation, human override

System health · data quality, integration reliability, duplication, maintenance burden, retirement rate

05

Where AI Fits in Every Role

AI is mapped to the work, not to the title. Capability is distributed; governance stays centralized.



AI mode by role and revenue stage

	Market	Demand	Qualify	Discover	Propose	Price	Close	Onboard	Adopt	Renew	Expand
Marketing	Augment	Automate	Recommend						Augment		Predict
Inbound		Automate	Human accountable	Augment							
Outbound	Augment	Automate	Recommend	Human accountable							
New Business			Augment	Augment	Recommend	Recommend	Human accountable	Automate			
Account Growth				Augment	Automate	Recommend	Human accountable		Predict	Predict	Recommend
Enterprise Accounts	Augment			Augment	Automate	Recommend	Human accountable			Predict	Recommend
Specialist Overlays				Augment	Automate		Human accountable		Augment		Recommend
Customer Success								Automate	Augment	Human accountable	Predict
Pricing / Deal Desk					Automate	Human accountable	Recommend				Predict
Enablement		Automate	Augment	Augment	Augment			Augment	Automate		
RevOps	Predict	Predict	Automate	Automate		Augment	Predict		Automate	Predict	Predict
AI Ops	Automate	Automate	Automate	Automate	Automate	Human accountable	Automate	Automate	Automate	Automate	Automate

Illustrative mapping. Soft-gray cells indicate low relevance for that role and stage; adapt to your own motions and controls.

The accountability continuum

AI is well suited for

- Summarizing
- Enriching
- Monitoring
- Drafting
- Detecting patterns
- Prioritizing
- Recommending patterns
- Automating routine actions

Human-in-the-loop decisions

- Opportunity qualification
- Renewal intervention
- Deal Strategy
- Expansion recommendation
- Forecast judgement
- Customer risk escalation

Humans remain accountable for

- Trust
- Judgement
- Negotiation
- Exceptions
- Ethical choices
- Customer commitments
- Pricing overrides
- Talent decisions
- Strategic tradeoffs

Guardrail

AI may recommend a price, prioritize an account, draft a proposal, identify an upsell/cross sell opportunity or flag a renewal risk. It should not silently redefine the ICP, change deal amounts or estimated close dates, approve a material exception, make a binding customer commitment or determine employee consequences.

A Hybrid AI Revenue Architecture

06

An anonymized information-services participant described a hybrid build-and-buy model.

Illustrative hybrid build-buy-integrate architecture

The RRCXO Growth Room discussion reflected a hybrid model. It should not be summarized as either "only proprietary AI" or "an external platform instead of its own AI."

Signal & intelligence layer	Whitespace discovery, enrichment, ICP definition, and prospect scoring — delivered by an external specialist platform in a defined upstream role.	Buy
Internal AI environment	A proprietary generative-AI environment giving employees controlled access to AI inside the company perimeter.	Build · internal
Proprietary execution layer	An AI-powered outreach workflow built in-house, where flexibility, differentiation, and cross-division control matter.	Build
Future workflow layer	Contract support, upsell intelligence, customer service, and additional sales-stage automation on the roadmap.	Hybrid

Accuracy note: based on participant discussion in the Exchange. Not an independent audit of the company's complete technology architecture. Company name withheld.

What AI Ops should take from a hybrid stack

- 01 Own the build-buy-integrate decision at the workflow level.
- 02 Separate data and signal layers from action and execution layers.
- 03 Do not confuse use of an external component with outsourcing the operating model.
- 04 Measure the value of the entire workflow, not only the performance of one tool.
- 05 Maintain clear ownership for integrations, model changes, user support, and retirement.

07

Design Principles

Eight rules that govern how the operating model is built and run.



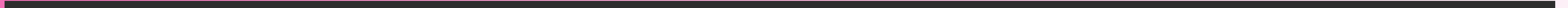
Eight design principles

Organize around revenue motions Acquisition, retention, and expansion require different roles, measures, incentives, and cadences.	Preserve one account strategy Specialists may participate, but a named account leader orchestrates the customer relationship.	Reward revenue quality Balance volume with NRR, margin, price realization, cost-to-serve, and profitability.	Move intelligence into workflow Signals must trigger actions, owners, timeframes, and coaching. Dashboards alone do not change performance.
Make leading indicators managerial Managers intervene on velocity, engagement, proposals, renewal preparation, and workflow adoption.	Treat data contribution as part of the job CRM evidence, call capture, customer outcomes, and clean handoffs are inputs to forecasting and AI quality.	Build AI with the field Frontline users shape workflow design, testing, and release criteria.	Retire low-value complexity Unused dashboards, duplicate agents, overlapping tools, and unprofitable exceptions should be removed.

08

Workforce Transition: What Changes

Roles do not disappear. Work is reduced in one place and elevated in another.



From legacy pattern to future state

FROM		TO	WORK REDUCED	WORK ELEVATED
SDR as high-volume activity role	→	Signal-led market development	Manual research, list building, generic follow-up	Identification, hypothesis, relevance, qualification
AE owns everything	→	Motion-specific new business and account growth	Admin, basic research, routine proposals	Discovery, negotiation, orchestration
Account manager as renewal coordinator	→	Account Growth Director	Calendar-driven renewal tasks	Value proof, whitespace, risk intervention
CS as support function	→	Value Realization function	Routine status updates and triage	Outcome ownership and risk recovery
RevOps as CRM and reporting	→	Revenue system architect	Manual reporting and hygiene policing	Economics, capacity, process design, decision intelligence
AI work as side project	→	AI Ops discipline	Unmanaged experiments and duplicate agents	Workflow product management and value realization
Enablement as training calendar	→	Revenue Enablement and AI Adoption	Generic content delivery	Manager coaching, simulation, workflow adoption

Build, buy, redeploy, or retire

Build

Capabilities that create strategic differentiation or require deep integration with proprietary workflows.

Buy

Mature horizontal capabilities where speed, reliability, and maintenance economics favor an external platform.

Redeploy

Strong relationship and commercial talent from administrative roles into higher-value customer work.

Retire

Duplicated tools, low-adoption agents, reports without decisions, and roles built on manual coordination.

COMPENSATION IMPLICATIONS

Separate acquisition credit from retention and expansion credit.

Include revenue quality measures where the seller materially influences margin, discounting, or deliverability.

Use shared credit selectively where overlays or cross-functional teams materially influence the result.

Reward coordinated account outcomes, not internal product competition.

Do not incentivize AI usage volume. Reward improved workflow and commercial outcomes.

Modify incentives to include meeting leading KPIs, not just lagging.

09

How the Organization Evolves

Eighteen months, five phases, and a named failure mode for each.



Five phases over eighteen months

0-30 days Align Create mandate and baseline	31-90 days Design Build minimum viable operating spine	3-6 months Pilot Prove value in selected motions	6-12 months Scale Extend what works and redesign roles	12-18 months Optimize Operate a learning revenue system
KEY MOVES Name sponsor; define motions; map ownership; inventory agents and tools; baseline NRR, pipeline, margin, adoption	KEY MOVES Publish RevOps and AI Ops charters; standardize definitions; select 2-3 workflows; set controls	KEY MOVES Pilot acquisition, retention, and deal workflows; train managers; instrument adoption and economics	KEY MOVES Scale proven workflows; update roles, incentives, territories, playbooks, and cadences	KEY MOVES Rationalize tools; automate controls; calibrate talent; institutionalize portfolio reviews
EVIDENCE One agreed operating model and priority list	EVIDENCE Clear decision rights and launch-ready workflow designs	EVIDENCE Behavior change and directional business value	EVIDENCE Improved velocity, NRR, price realization, productivity	EVIDENCE Faster decisions, lower complexity, stronger revenue quality
FAILURE MODE Beginning with a technology purchase	FAILURE MODE A transformation office without field ownership	FAILURE MODE Measuring logins instead of outcomes	FAILURE MODE Running legacy and future processes indefinitely	FAILURE MODE Treating the work as a one-time reorganization

Minimum executive decisions

01 Who owns the full customer and revenue lifecycle?

02 Which measures define revenue quality, not only revenue volume?

03 Which executive owns commercial AI value realization?

04 Which data and workflow standards are mandatory?

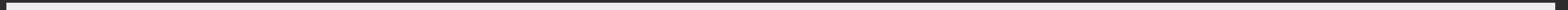
05 Where is human approval non-negotiable?

06 Which roles, tools, reports, and incentives must be retired?

10

Implementation Toolkit

Three worksheets to complete with your own team. Print or fill on screen.



Revenue-motion ownership map

MOTION	PRIMARY OWNER	SUPPORTING ROLES	ENTRY CRITERIA	EXIT / HANDOFF	CORE KPI
Acquisition					
Retention					
Expansion					
Win-back					

AI workflow intake

Business outcome

Decision or task to improve

Data required

Baseline

Pilot duration

Current workflow and pain point

Users and owner

Human-review requirement

Expected value

Scale / stop criteria

Workflow prioritization score

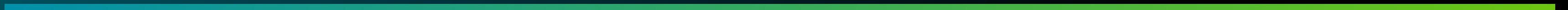
USE CASE	ECONOMIC VALUE	FEASIBILITY	DATA READINESS	ADOPTION READINESS	RISK / CONTROL

Suggested rating: 1 = low or weak; 5 = high or strong. Risk may be reverse-scored.

11

Management Cadence and Scorecard

The operating rhythm that keeps the system running after the redesign.



The operating rhythm

AT THE CENTER

Profitable growth, NRR,
customer value, and AI value
realization

Every review below asks the same core
question:
Is this motion moving the number?

CADENCE	PARTICIPANTS	FOCUS	OUTPUT
Weekly revenue signal review	Sales, CS, Marketing, RevOps	Leading indicators, pipeline integrity, at-risk deals, capacity	Clear next actions + blockers
Biweekly AI adoption review	AI Ops, RevOps, managers	Usage, quality, reliability, adoption blockers	Promote, fix, or retire decisions
Monthly revenue quality review	CRO, CFO, Owners (by motion)	NRR, margin, lifecycle, unit economics, portfolio mix	Bets, cuts, pricing and packaging adjustments
Quarterly strategy review	Executive team	Operating model, role design, tool portfolio, capacity plan	Pivot, redesign, or scale decisions
Quarterly talent calibration	CRO, CHRO, HR, RevOps	Role-to-fit, capability, performance, bench	Hire, reassign, coach/exit, hiring plan

The executive scorecard

Values intentionally blank — populate with your own baseline and target.

Growth

New revenue · expansion · win-back · share of wallet

Are we creating the right revenue in the right markets?

Retention

Gross retention · NRR · contraction · risk coverage

Are we protecting and expanding customer value?

Revenue quality

Margin · price realization · leakage · profitability

Is growth economically attractive and deliverable?

Execution

Velocity · stage evidence · forecast
confidence · intervention

Can management see and act early enough?

Productivity

Revenue per seller · cost of sales ·
capacity · customer time

Are people spending time where human judgment matters?

AI value

Adoption · quality · reliability · time
returned · revenue influenced · risk

Is AI improving the workflow and the economics?

Customer

Time-to-value · adoption · value proof
· relationship depth

Is the customer experiencing measurable value?

READING THE SCORECARD

Seven domains, reviewed on the cadence opposite. No domain is owned by a single function.

12 90-Day Activation Plan

Eight focus areas, each with a first action, an owner, and a progress indicator.



The first ninety days

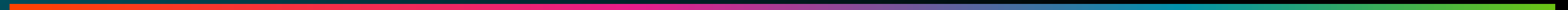
FOCUS AREA	FIRST ACTIONS	OWNER	PROGRESS INDICATOR
Operating model	Confirm executive mandate; define motions; establish account-ownership rules	Commercial executive	Approved model and decision rights
RevOps / AI Ops	Publish charters; create one backlog and one weekly handshake	Head of Growth Ops	Leaders named; shared roadmap operating
Definitions	Standardize ICP, customer, opportunity, renewal, NRR, and margin	RevOps	Executive sign-off and system implementation
Priority workflows	Select one acquisition, one retention, and one deal workflow	AI Ops + business owners	Pilots launched with baselines
Role redesign	Update expectations for new business, account growth, enterprise, overlays, and CS	Sales leadership + HR	Role charters and pilot teams established
Enablement	Train managers first; embed coaching and workflow adoption	Enablement	Observed adoption and coaching evidence
Rationalization	Inventory dashboards, agents, automations, and tools; retire duplicates	RevOps + AI Ops + IT	Reduced tool and agent count
Value review	Measure operating and financial effect; scale only proven workflows	CCO + CFO	Scale, revise, or stop decision

PRACTICAL STARTING POINT

A company does not need a large AI Ops organization on day one. It needs a named leader, a joint RevOps–AI Ops backlog, a small number of high-value workflows, explicit controls, and credible value measures.

Future-State Commercial Roles

Eleven sample job descriptions to adapt by company size, motion, and business model.



Eleven roles at a glance

DEMAND CREATORS

Inbound Revenue Development Manager

Intent into qualified, well-routed opportunity

Outbound Market Development Executive

Signal-led demand in priority markets

REVENUE PRODUCERS

New Business Director

Strategically valuable new customers

Account Growth Director

Renewal, value realization, whitespace

Enterprise / Global Account Director

The most complex relationships

Specialty Overlay Executive

Depth without disrupting ownership

CUSTOMER VALUE & SUPPORT

Customer Success & Value Realization Director

Measurable value, early risk intervention

Commercial Pricing & Deal Strategy Lead

Profitable, deliverable deals

Revenue Enablement & AI Adoption Lead

Capability, coaching, workflow adoption

GROWTH OPERATIONS

Head of Revenue Operations

The commercial operating system

Head of AI Operations, Revenue

Governed, adopted, measurable AI including a team of AI GTM engineers

Each role page follows the same template: purpose, outcomes, responsibilities, AI-enabled work, measures, and candidate profile.

Inbound Revenue Development Manager

Convert customer intent into qualified, well-routed opportunities while protecting the buyer experience.

ACQUISITION MOTION

Reports to Demand / Growth Operations

PRIMARY OUTCOMES

- Fast response to high-intent demand
- Higher inquiry-to-opportunity conversion
- Clean handoff to the correct revenue owner

CORE RESPONSIBILITIES

- Own qualification standards and service levels
- Interpret fit, urgency, and buying context
- Route by motion, segment, and product
- Capture evidence and next steps
- Improve routing logic with RevOps

AI-ENABLED WAY OF WORKING

- Enrichment, intent summaries, account context, recommended questions
- Automate scheduling and routine follow-up

HUMAN ACCOUNTABILITY

Validate recommendations before disqualifying or routing. Own qualification judgment and the buyer experience.

MEASURES OF SUCCESS

- Speed-to-lead
- Accepted opportunity rate
- Pipeline created
- Conversion and revenue quality by source

CANDIDATE PROFILE

- Commercial curiosity and disciplined discovery
- Strong communication
- Data and AI fluency
- Customer-first judgment

Outbound Market Development Executive

Create qualified demand in priority markets by combining human relevance with signal-driven, AI-supported prospecting.

ACQUISITION MOTION

Reports to Demand / Growth Operations

PRIMARY OUTCOMES

- New buying conversations in priority ICPs
- High-quality sourced pipeline
- Efficient market coverage

CORE RESPONSIBILITIES

- Build account hypotheses and stakeholder maps
- Execute coordinated outreach
- Develop point-of-view messaging
- Convert engagement into discovery
- Feed market learning to Marketing and RevOps

AI-ENABLED WAY OF WORKING

- Research, trigger detection, message variation, call preparation
- Automate sequence administration and monitoring

HUMAN ACCOUNTABILITY

Personally own relevance, consent, and relationship creation. Ethical use of automation is non-negotiable.

MEASURES OF SUCCESS

- Opportunities created
- Opportunity conversion
- Pipeline quality and velocity
- Revenue per unit of prospecting capacity

CANDIDATE PROFILE

- Research discipline
- Commercial writing
- Ability to interpret signals
- Ethical use of automation

New Business Director

Acquire strategically valuable new customers and buying centers with strong economics, credible commitments, and clean delivery handoffs.

ACQUISITION MOTION
Reports to Revenue Team

PRIMARY OUTCOMES

- New-logo revenue
- Healthy margin and price realization
- Accurate expectations and strong handoff

CORE RESPONSIBILITIES

- Lead discovery and opportunity strategy
- Coordinate solution, pricing, product, and delivery
- Build business cases and proposals
- Negotiate within guardrails
- Maintain evidence-based forecast discipline

AI-ENABLED WAY OF WORKING

- Account briefs, discovery prep, proposals, comparable-deal insight, risk flags
- Call intelligence for coaching

HUMAN ACCOUNTABILITY

Retain accountability for claims, commitments, negotiation, and relationship quality.

MEASURES OF SUCCESS

- New revenue and win rate
- Cycle time
- Margin and price realization
- Forecast confidence
- Early customer success

CANDIDATE PROFILE

- Consultative seller
- Strong commercial judgment
- Financial and data fluency
- AI-native work habits

Account Growth Director

Protect and expand customer revenue by orchestrating renewal, value realization, whitespace, and coordinated action.

RETENTION & EXPANSION

Reports to Revenue Team

PRIMARY OUTCOMES

- High NRR and controlled contraction
- Expansion across products and buying centers
- Documented customer value

CORE RESPONSIBILITIES

- Own the integrated account plan
- Lead renewal and expansion strategy
- Coordinate CS, specialists, product, and delivery
- Mobilize early risk intervention
- Maintain one customer narrative

AI-ENABLED WAY OF WORKING

- Health summaries, whitespace, risk, stakeholder maps, QBRs, next-best actions

HUMAN ACCOUNTABILITY

Challenge AI with customer context. Prevent automation from fragmenting the relationship.

MEASURES OF SUCCESS

- NRR and gross retention
- Expansion and contraction avoided
- Product penetration
- Account profitability

CANDIDATE PROFILE

- Strategic account management
- Orchestration and influence
- Customer-value orientation
- Analytical judgment

Enterprise Account Executive / Global Account Director

Lead strategy, governance, and economic development for the most complex multi-product and multi-stakeholder relationships.

RETENTION & EXPANSION

Reports to Revenue Team

PRIMARY OUTCOMES

- Enterprise retention and share-of-wallet growth
- Coordinated account strategy
- Executive trust and predictable governance

CORE RESPONSIBILITIES

- Own enterprise account and decision map
- Orchestrate specialists
- Run executive business reviews
- Manage complex agreements and escalations
- Align local opportunities to enterprise strategy

AI-ENABLED WAY OF WORKING

- Synthesize activity, map stakeholders, detect gaps, model scenarios
- Automate briefings and alerts

HUMAN ACCOUNTABILITY

Retain human ownership of negotiation, executive relationships, and political nuance.

MEASURES OF SUCCESS

- Enterprise NRR
- Share of wallet
- Multi-product penetration
- Margin and contract quality
- Executive sponsor coverage

CANDIDATE PROFILE

- Complex enterprise-selling record
- Executive presence
- Systems thinking
- Financial and contractual fluency

Specialty Overlay Executive

Provide deep product, industry, technical, or use-case expertise that increases solution fit without disrupting account ownership.

OVERLAY
Reports to Revenue Team

PRIMARY OUTCOMES

- Higher attach rate
- Faster specialist opportunity progression
- Stronger margin and lower delivery risk

CORE RESPONSIBILITIES

- Partner with the named account owner
- Lead specialist discovery and solution design
- Develop demos and evidence
- Clarify feasibility and dependencies
- Transfer knowledge to core sellers

AI-ENABLED WAY OF WORKING

- Technical research, configuration options, demo preparation, evidence retrieval
- Document reusable knowledge

HUMAN ACCOUNTABILITY

Validate all customer-facing claims. Expert validation and coordinated selling remain human work.

MEASURES OF SUCCESS

- Influenced revenue and attach rate
- Conversion
- Margin and cycle time
- Post-sale solution quality

CANDIDATE PROFILE

- Deep domain expertise plus commercial skill
- Collaborative behavior
- Ability to simplify complexity
- Disciplined AI use

Customer Success and Value Realization Director

Ensure customers achieve measurable value, surface risk early, and create the conditions for renewal, advocacy, and responsible expansion.

RETENTION MOTION

Customer Value & Support

PRIMARY OUTCOMES

- Adoption and value realization
- Earlier risk intervention
- Renewal readiness and credible value proof

CORE RESPONSIBILITIES

- Build mutual success plans
- Monitor adoption and outcomes
- Lead risk and recovery plans
- Document value throughout the contract
- Partner with account owners on expansion readiness

AI-ENABLED WAY OF WORKING

- Health analysis, summaries, risk detection, value narratives, routine communication

HUMAN ACCOUNTABILITY

Escalate sensitive situations to humans. Validate signals against direct customer evidence.

MEASURES OF SUCCESS

- Gross retention
- Time-to-value and adoption
- Risk recovery
- Customer outcomes and referenceability

CANDIDATE PROFILE

- Customer-outcome orientation
- Strong intervention skill
- Analytical judgment
- Ability to translate usage into value

Commercial Pricing and Deal Strategy Lead

Protect growth quality by helping teams design profitable, deliverable, and strategically sound deals before commitments are made.

GOVERNANCE & ECONOMICS
Customer Value & Support

PRIMARY OUTCOMES

- Improved price realization and margin
- Faster, more consistent approvals
- Fewer unprofitable commitments

CORE RESPONSIBILITIES

- Engage early in material opportunities
- Model customer and deal economics
- Set guardrails and thresholds
- Challenge packaging and delivery assumptions
- Maintain comparable-deal intelligence

AI-ENABLED WAY OF WORKING

- Scenarios, comparable deals, anomaly detection, quotes, policy checks
- Monitor bias and false precision

HUMAN ACCOUNTABILITY

Require human approval for material exceptions.
Profitability judgment is never delegated.

MEASURES OF SUCCESS

- Price realization and gross margin
- Approval time
- Exception rate and discount leakage
- Post-sale profitability

CANDIDATE PROFILE

- Commercial finance or strategic-pricing experience
- Balanced judgment
- Negotiation skill
- Analytics and AI fluency

Revenue Enablement and AI Adoption Lead

Build the capabilities, manager routines, and workflow adoption required for the new revenue model to perform.

HUMAN-AI WORKFLOWS

Customer Value & Support

PRIMARY OUTCOMES

- Faster ramp
- Consistent execution
- Sustained adoption of approved AI workflows

CORE RESPONSIBILITIES

- Own role-based capabilities and onboarding
- Build manager coaching systems
- Translate releases into field practice
- Run simulations and certifications
- Measure behavior change

AI-ENABLED WAY OF WORKING

- Personalized learning, call review, simulation, retrieval, skill diagnosis
- Partner with AI Ops on adoption telemetry

HUMAN ACCOUNTABILITY

Set verification standards. Methodology and manager accountability stay with people.

MEASURES OF SUCCESS

- Ramp time
- Methodology and workflow adoption
- Manager coaching
- Skill progression and productivity

CANDIDATE PROFILE

- Revenue-methodology expertise
- Change-management credibility
- Learning-design skill
- Strong AI adoption mindset

Head of Revenue Operations

Build and govern the commercial operating system that converts market opportunity and customer evidence into predictable, profitable growth.

COMMERCIAL INTELLIGENCE

Reports to Growth Operations

PRIMARY OUTCOMES

- Trusted revenue definitions and data
- Credible forecasts and leading indicators
- Efficient capacity and strong revenue economics

CORE RESPONSIBILITIES

- Own commercial data model, TAM/ICP, territories, quota, pipeline, forecasting, NRR/LTV, productivity, and cadence
- Partner with Finance on profitability and pricing
- Co-own the workflow backlog with AI Ops

AI-ENABLED WAY OF WORKING

- Forecasting, anomaly detection, capacity scenarios, data quality, decision support
- Measure whether insights lead to intervention

HUMAN ACCOUNTABILITY

Ensure models use governed definitions and explainable business logic. Owns definitions, economics, and cadence.

MEASURES OF SUCCESS

- Forecast confidence and pipeline velocity
- NRR and price realization
- Seller productivity and cost of sales
- Data quality

CANDIDATE PROFILE

- Commercial strategist
- Finance and analytics fluency
- Systems thinking
- Change leadership

Head of AI Operations, Revenue

Convert AI capability into governed, adopted, measurable improvements across the commercial workflow.

HUMAN-AI WORKFLOWS

Reports to Growth Operations

PRIMARY OUTCOMES

- High-value AI workflow portfolio
- Reliable and adopted agents and automation
- Measured business value with controlled risk

CORE RESPONSIBILITIES

- Own use-case portfolio, workflow design, evaluation, model and prompt operations, adoption, monitoring, human review, and retirement
- Partner with RevOps on process and economics
- Coordinate enterprise architecture and controls

AI-ENABLED WAY OF WORKING

- Design build-buy-integrate choices
- Instrument quality and adoption
- Create release, support, and retirement standards

HUMAN ACCOUNTABILITY

Maintain human escalation paths. Owns portfolio governance and value realization.

MEASURES OF SUCCESS

- Adoption, reliability, and quality
- Time-to-value
- Revenue influenced and cost avoided
- Risk events and retirement rate

CANDIDATE PROFILE

- Product-minded operator
- Revenue workflow knowledge
- AI systems and data fluency
- Governance and change leadership

Source and limitations

This playbook synthesizes the July 15, 2026 Growth Room Exchange discussion and the draft organizational chart supplied after the session. The Exchange was conducted as a confidential peer discussion, so sensitive comments are presented as themes rather than attributed to individuals.

Named company examples are based on participant descriptions and are included to illustrate operating approaches. They are not independent audits. Reporting lines, job descriptions, and implementation models are Revenue Room™ recommendations that should be adapted to company size, business model, product complexity, regulatory requirements, and existing executive accountability.

The new revenue organization is a redesign, not a technology overlay

It will emerge when customer ownership, revenue motions, commercial intelligence, incentives, governance, and human-AI workflows are designed as one operating system.

