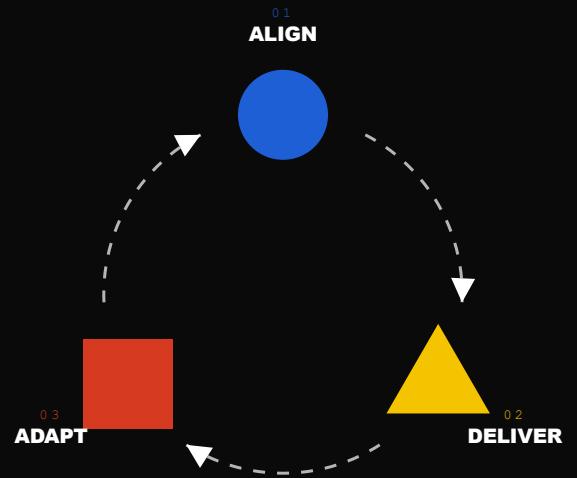


# The Agile GTM Ops Operating Loop.

An operating model for the converged GTM operations function —  
the discipline AI is making structurally non-negotiable.



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# AI is forcing the convergence into GTM Ops.

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The pace at which go-to-market organizations need to evolve has fundamentally changed. AI-powered tooling — signal capture, intent platforms, autonomous outreach, agentic workflows, AI SDRs — is reshaping every stage of the funnel in cycles measured in weeks rather than quarters. Buyer behavior, channel performance, attribution models, and team structures are now shifting faster than traditional GTM operating cadences were designed to handle.

The instinct, faced with this pace, is to respond function by function. One team adopts a signal layer. Another pilots autonomous outreach. A third rolls out AI-powered account scoring. Each move is rational. None of them, alone, close the structural gap they sit on top of.

*AI didn't create the gap. It exposed it — and forced every adjacent function to converge on the same operating substrate.*

That gap is not new. Sales, Marketing, Customer Success, Product, and Finance have always operated on different data, different planning cycles, and different definitions of progress. In a slower GTM environment those misalignments were tolerable. AI does not introduce a new problem. It removes the ability to keep tolerating an old one.

## THE PATTERN

### **This isn't the first time.**

The convergence happening now isn't unprecedented. It's the second time the same pattern has played out in modern GTM operations — driven by the same structural pressure, producing the same kind of consolidation.

The first wave gave us RevOps. A decade ago, disparate operational disciplines were scattered across the org chart — each reporting into its parent function, each owning a fraction of the operational layer. They converged because different data, different planning cycles, and different definitions of progress had become impossible to reconcile at the customer level. The org needed one function that could see across all of them.

RevOps was the answer to the first wave. It is not built to handle the second. The same structural pressure that produced RevOps a decade ago is now producing the next consolidation — at a faster pace, across a larger surface area, with AI as the forcing function. RevOps becoming GTM Ops isn't a break from precedent. It's the precedent repeating.

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WHERE IT LANDS

## **GTM Ops is what RevOps is becoming.**

RevOps holds the strongest claim to the converged seat, though not an exclusive one. The advantage is structural: neutral cross-functional standing across Sales, Marketing, Customer Success, Product, and Finance, and an existing operational mandate over the data, systems, and cadences every adjacent function now depends on. The convergence isn't replacing RevOps. It is what RevOps becomes when it absorbs the disparate, siloed operational work currently scattered across the org chart.

That converged function — call it GTM Ops — needs three things that no single legacy discipline had alone:

- **An owned data and event layer.** CRM, attribution, account structure, lead routing, plus the real-time event streams every AI tool depends on to produce signal instead of noise.
- **An owned operational rhythm.** Planning, prioritization, capacity, risk, and eval cadence that turns AI experiments into shipped capabilities at a tempo matched to the rate of change in the market.
- **Neutral cross-functional authority.** Across Sales, Marketing, Customer Success, Product, and Finance — so investments can be evaluated against real revenue impact rather than functional ROI.

*GTM Ops isn't a new function. It's the function the old org chart was always trying to assemble.*

*A note on terminology.* This paper uses "GTM Ops" throughout as shorthand for the converged function. Depending on your organization, the same operating mandate may sit under RevOps, Marketing Ops, Sales Ops, Growth Engineering, GTM Engineering, or a hybrid name specific to your stack. The methodology travels. The label follows the org.

This paper is that operating model. The Agile GTM Ops Operating Loop was not built specifically for AI. It was built for the conditions AI is now making structurally non-negotiable — a single cross-functional operating discipline, owned by the function with the cleanest claim to the seat, executing at a cadence matched to the rate of change in the market. The same Align → Deliver → Adapt loop that turns strategy into shipped revenue work converts AI from a procurement exercise into a compounding advantage.

What follows is that model — in full, in detail.

# Strategy doesn't fail at the slide. It fails at the sprint.

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Go-to-market organizations today face increasing complexity — fragmented planning cycles, siloed execution, disconnected systems, and slow reaction times to customer and market shifts. Traditional RevOps approaches focus narrowly on technology and reporting. Disparate, siloed operational disciplines — scattered across the org chart — each own a fraction of the answer. None of them, alone, deliver the cross-functional operating discipline AI-era GTM now requires.

The Agile GTM Ops Operating Loop is a flexible, scalable system for unifying strategy, execution, and continuous improvement across the entire revenue engine. Structured around Align → Deliver → Adapt and informed by Agile methodology, the Scaled Agile Framework® (SAFe), and Value Stream Management best practices, it connects work directly to outcomes, delivers value faster, and adapts quarter after quarter.

Agile GTM Ops is focused on optimizing GTM Value Streams — cross-functional, customer-centered flows such as Lead-to-Cash and Onboard-to-Renew. Organizing around Value Streams allows teams to prioritize initiatives based on real business impact rather than departmental silos, measure flow efficiency, and focus execution on accelerating customer outcomes.

*GTM Ops sits at the intersection of Sales, Marketing, Customer Success, Product, and Finance. It can see gaps no single function can address alone.*

This guide introduces a complete operating system for GTM Ops, including:

- Formalized quarterly planning modeled after SAFe PI Planning — aligning OKRs, initiatives, and capacity across departments.
- Disciplined agile execution through sprint cadences, governed work intake, and program board visibility.
- Continuous Inspect & Adapt cycles that improve predictability, flow, and organizational resilience.
- Defined roles, governance, and cadences that balance strategic oversight with executional autonomy.
- Integrated Value Stream thinking into every layer of planning, delivery, and improvement.

Organizations that adopt the Operating Loop can expect faster revenue realization, stronger cross-team collaboration, more predictable results, and a scalable, adaptable GTM operating model that keeps pace with customer and market demands.

# Align. Deliver. Adapt.

The Operating Loop is structured around a continuous loop: Align → Deliver → Adapt. Each phase is essential, and together they create a closed system for prioritizing work, executing with discipline, and continuously improving how revenue is generated and sustained.

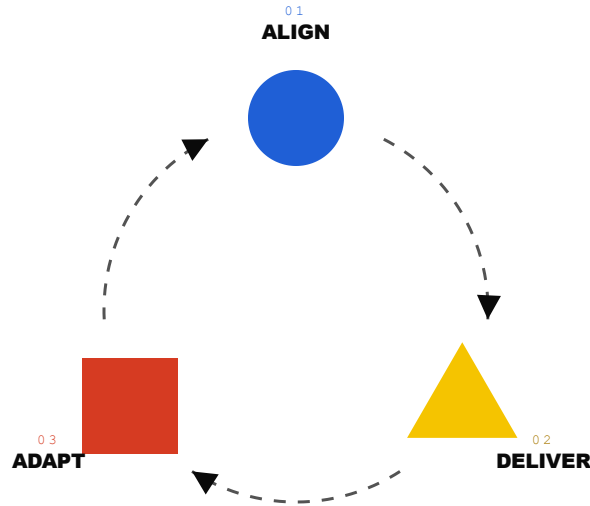


FIG. 01 · ALIGN → DELIVER → ADAPT · A QUARTERLY OPERATING LOOP

## THE THREE PHASES

### ALIGN

#### Plan and prioritize.

Quarterly work is set against strategic goals and Value Stream KPIs. Initiatives, capacity, and OKRs are aligned across functions.

### DELIVER

#### Execute incrementally.

Work moves through agile sprints with iterative reviews, governed intake, and live program-board visibility.

### ADAPT

#### Inspect and improve.

Results, risks, and processes are reviewed continuously. Lessons feed the next planning cycle.

## WHAT THIS LOOP SOLVES

This loop is explicitly designed to address the chronic problems facing modern GTM organizations:

- Strategy drifts from execution.
- Work volume overwhelms real value delivery.
- Teams operate in silos without a clear view of the whole customer journey.
- Course corrections happen too slowly, after problems have compounded.

# Plan the work. Plan the risk.

The Align phase mirrors a SAFe-style Program Increment (PI) planning event, adapted for go-to-market realities. It establishes a quarterly operating rhythm for GTM-Ops-led, GTM-Ops-dependent, and cross-functional initiatives — without disrupting day-to-day execution of Sales, Marketing, or Customer Success.

*Important context.* GTM Ops leads planning for systemic, high-impact initiatives that cut across departments or rely on GTM Ops support. Sales, CS, Marketing, and G&A continue managing their core operational activities independently. Agile GTM Ops planning ensures that major initiatives are intentional, coordinated, and aligned to Value Streams — not that frontline GTM execution must operate on a sprint cycle.

*Agile GTM Ops enables GTM execution. It doesn't control it.*

## WHAT GETS PLANNED (AND WHAT DOESN'T)

TYPE OF WORK	PLANNED	EXAMPLE
<b>GTM-Ops-Led Initiatives</b>	Yes	CRM migrations, attribution overhauls, AI tool consolidation
<b>GTM-Ops-Dependent Cross-Functional Initiatives</b>	Yes	Sales enablement rollout requiring data system changes
<b>Purely Departmental Core Activities</b>	No	Quota-carrying sales activities, CSM QBRs
<b>GTM Strategy Enablement Work</b>	Yes	Sales process redesign, onboarding improvements

## WHY FORMALIZED PLANNING MATTERS

- It breaks functional silos through shared vision and goals.
- It ensures quarterly work ties back to measurable revenue-driving outcomes.
- It reduces execution chaos by aligning dependencies upfront.
- It embeds risk awareness into the operating rhythm from Day 1.
- It builds true ownership and cross-functional accountability.

THE QUARTERLY AGENDA

**Eight moves across two days.**

- 01 **Context** — Executive briefing. Review corporate strategy, financial targets, market trends, and strategic imperatives. Frame why this quarter matters.

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- 02 **Retro** — Prior-quarter retrospective. Present OKR scorecards. Analyze Value Stream KPIs — cycle times, conversion rates. Identify wins, gaps, missed opportunities.

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- 03 **OKRs** — OKR review. Marketing, Sales, CS, and GTM Ops review draft OKRs prepared beforehand. OKRs must align directly to Value Stream improvements.

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- 04 **Pitches** — Initiative pitches. Teams propose initiatives designed to advance OKRs. Each pitch states expected impact and traces back to OKRs.

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- 05 **Prioritize** — Prioritization exercise. All initiatives are scored by Value Stream and OKR impact. Higher-impact work goes to committed scope; lower goes to stretch.

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- 06 **Breakouts** — Cross-team breakouts. Teams define major Epics, break them into initial Stories, and map cross-functional dependencies.

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- 07 **Program Board** — Build the Program Board. Visualize the next quarter sprint-by-sprint. Place Epics and Stories. Draw dependency lines.

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- 08 **ROAM** — Risk session. Capture all risks. Classify each as Resolved, Owned, Accepted, or Mitigated. Assign ownership.

CONFIDENCE AND COMMITMENT

Teams vote on their confidence in delivering the plan (target: 80% or higher). Gaps are discussed openly before finalizing. The Program Board, OKRs, and ROAM risks are committed. Ownership is confirmed. The quarter is launched.

QUARTERLY PLANNING OUTPUTS

OUTPUT	DESCRIPTION
<b>Quarterly OKRs</b>	Final set of organizational and departmental OKRs, tied to Value Streams.
<b>Program Board</b>	Visualized sprint plan with key deliverables and inter-team dependencies.
<b>ROAM Board</b>	Major risks, categorized and assigned for active management.
<b>Sprint 1 Backlog</b>	Detailed Stories and Tasks, ready for immediate execution.
<b>Capacity Allocations</b>	Initial resource assignments — people, systems, budget — across initiatives.

# Execute in two-week heartbeats.

Once the quarterly plan is committed, work moves into agile execution cycles designed for speed, transparency, and quality. The Deliver phase turns strategic initiatives into tangible business outcomes in a predictable, iterative way.

## AGILE DELIVERY SUPPORTS GTM WITHOUT DISRUPTING IT

The Operating Loop complements — it does not replace — the GTM operating rhythm. Sales, Marketing, and CS continue focusing on running the business. GTM Ops executes agile sprints around them, handling:

- **System enhancements** — CRM fixes, quoting optimizations, AI tool integration.
- **Process improvements** — Sales-to-CS handoff refinements, intent-to-action workflows.
- **Strategic and cross-functional projects** — sales methodology rollout, AI deployment.

GTM teams may contribute when needed (a training, a review, an input), but they are not expected to fully adopt agile ceremonies.

*GTM Ops limits the burden on frontline teams by absorbing the agile operations load.*

## CADENCE — TWO-WEEK SPRINTS, FIVE PER QUARTER

Each quarter includes five 2-week sprints plus one Innovation & Planning Sprint for catch-up, learning, and the next Align cycle.

CEREMONY	PURPOSE
<b>Sprint Planning</b>	Commit Stories and capacity for the next two weeks.
<b>Standups</b>	Daily or twice-weekly syncs — short, blocker-focused, action-oriented.
<b>Reviews / Demos</b>	Demo completed work, connect outcomes to OKRs and Value Stream KPIs.
<b>Retrospectives</b>	Inspect the process, capture improvements, feed Adapt cycle.
<b>Program Board</b>	Updated after each sprint. Dependencies and risks adjusted as needed.

HIERARCHY — TIERED WORK STRUCTURE

Every layer of work ties back to the Value Streams and OKRs committed during Quarterly Planning, ensuring execution stays strategically anchored.

LEVEL	SCOPE	HORIZON
<b>Initiative</b>	Cross-functional, strategic objective tied to an OKR and Value Stream impact.	1–2 Quarters
<b>Epic</b>	Major deliverable within an Initiative.	≤ 1 Quarter
<b>Story</b>	Sprint-sized work item delivering incremental value.	≤ 2 Weeks
<b>Task</b>	Single action needed to complete a Story.	≤ 1 Day

MANAGING PLANNED AND UNPLANNED WORK

Agile execution demands full visibility into all work — not just what was planned at the beginning of the quarter, but the inbound, emergent work that surfaces mid-flight. Both must be tracked, triaged, and governed through a consistent system.

TYPE	DESCRIPTION	LOGGED	GOVERNANCE
<b>Planned</b>	Initiatives, Epics, Stories, and Tasks scoped during Quarterly Planning.	Program Board → Sprint Boards	Owned by Initiative and Story owners; adjusted only through Working Group.
<b>Unplanned</b>	Incoming requests, urgent issues, or reactive needs surfacing mid-quarter.	Work Intake Form → Boards	Triaged weekly: minor by Working Group; major escalations to Steering Council.

INTAKE & CAPACITY

All non-routine work — planned and unplanned — must surface to program and sprint-level boards. Ticketing allows requests to be made, triaged, prioritized, and integrated into the plan where appropriate.

- **Fields.** Requester · Title · Business Outcome Expected · Linked OKR · Urgency × Importance · Value Stream Impact · Estimated Effort · Status.
- **Triage.** Working Group approves minor scope shifts; major shifts escalate to Steering Council.
- **Capacity.** No more than 80% of sprint capacity committed during planning. 20% reserved for high-priority unplanned work.

SUCCESS FACTORS

- Definition of Done is established and met for all work.
- Sprint Demos tie completed Stories directly to OKRs and KPIs.
- ROAM Board is updated every sprint.
- Cross-Functional Collaboration is mandatory where dependencies exist.

# Run the loop. Improve the loop.

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The Adapt phase ensures GTM Ops isn't just executing a plan — it's continuously learning, improving, and evolving execution based on empirical results. Rather than running blindly through a quarter, GTM Ops teams pause at regular intervals to reflect, measure, and course-correct in ways that optimize value delivery across the customer journey.

## OPERATING RHYTHM

### Working Group weekly sync.

- Review current sprint progress.
- Update the Program Board status.
- Actively manage risks and blockers via the ROAM board.
- Resolve minor scope conflicts within sprint buffer limits.
- Identify and escalate major issues early.

### Executive Steering Council review.

- Review organizational KPI trends.
- Inspect OKR progress across Value Streams.
- Assess strategic ROAM risks and escalations.
- Reallocate resources when major gaps or new opportunities emerge.

## INSPECT & ADAPT — THE QUARTERLY I&A EVENT

The Quarterly Inspect & Adapt (I&A) event is at the core of this phase. It keeps the Operating Loop responsive and effective. By reviewing OKR outcomes, analyzing Value Stream performance, and identifying systemic blockers, the I&A closes the loop between planning and delivery. It converts operational data into actionable improvement themes — so the system gets smarter every quarter.

*Without I&A, agility becomes performative. With it, GTM Ops becomes a compounding engine of growth, precision, and cross-functional maturity.*

## I&A AGENDA — SIX STEPS TO COMPOUND IMPROVEMENT

- 01 Demo** — System demo. Showcase major initiative deliverables across the quarter. Connect demoed outcomes to Key Results and Value Stream KPIs.
  - 02 OKR Grade** — Score each OKR as Met, Partial, or Missed. Identify root causes behind misses.
  - 03 ROAM** — Resolved risks archived. Owned and Accepted risks reprioritized. New mitigation plans created for critical risks.
  - 04 KPIs** — Value Stream trend review. Examine quarterly movement in core metrics — cycle time, win-rate, NRR, etc.
  - 05 Root Cause** — RCA. Analyze the top 2–3 systemic issues. Focus on system-level causes, not individual blame.
  - 06 Backlog** — Backlog refinement. Capture systemic improvement items. Add them into intake for the next quarterly planning event.
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# Organize around how value moves.

In the Operating Loop, Value Streams are the foundation for aligning planning, execution, and improvement with business outcomes. Value Streams define how value moves across the organization — from lead generation to closed revenue, from onboarding to renewal — and provide a clear structure for prioritizing and delivering work.

By organizing around Value Streams instead of siloed departmental goals, GTM organizations become faster, better aligned, and more focused on delivering measurable results.

## IN EACH PHASE — HOW VALUE STREAMS ANCHOR THE LOOP

PHASE	ROLE
<b>Align</b>	Prioritize where flow can be improved. Initiatives are scored against Value Stream impact.
<b>Deliver</b>	Tie sprints to flow acceleration. Every Story connects to a Value Stream KPI.
<b>Adapt</b>	Find and fix bottlenecks. Inspect & Adapt focuses on flow efficiency and system improvement.

## THE STREAMS — MAJOR GTM VALUE STREAMS

VALUE STREAM	DESCRIPTION	EXAMPLE KPIS
<b>Lead-to-Cash</b>	Initial engagement through closed revenue.	Sales Cycle Time, Win Rate %, MQL→SQL Conversion
<b>Onboard-to-Renew</b>	Onboarding through retention, upsell, renewal.	Net Revenue Retention %, Time-to-First-Value
<b>Issue-to-Resolution</b>	Customer support cases through resolution.	First Response Time, Resolution Time, CSAT
<b>Partner-to-Revenue</b>	Channel partner engagement to partner-sourced revenue.	Partner Activation Rate, Partner-Sourced Revenue

## BEFORE / AFTER — HOW VALUE STREAM MANAGEMENT CHANGES GTM

IMPACT AREA	WITHOUT VALUE STREAMS	WITH VALUE STREAMS
<b>Prioritization</b>	Based on team-specific goals	Based on improving customer flow and outcomes
<b>Execution Focus</b>	Activity-based (MQLs, demos)	Outcome-based (deal velocity, retention)
<b>Visibility</b>	Handoffs and risks hidden	Flow and dependencies surfaced early
<b>Continuous Improvement</b>	Local team optimizations	System-wide flow improvements
<b>Revenue Outcomes</b>	Slower, less predictable	Faster, more consistent

# Two bodies. One operating rhythm.

Agile GTM Ops operates through clearly defined roles and two complementary governing bodies: the Executive Steering Council and the Cross-Functional Working Group. Together, they ensure strategic alignment, execution accountability, risk management, and continuous improvement across the entire GTM operating engine.

## THE CONVERGED FUNCTION — WHO SITS INSIDE GTM OPS

GTM Ops is the integrated team that absorbs the disparate, siloed operational work currently scattered across the org chart — with RevOps as anchor as the function continues evolving into its converged form. In mature organizations, it operates as a single org under one leader (Head of GTM Ops, VP RevOps, or Chief Revenue Officer staff). In transitional organizations, it operates as a federated discipline with a shared Working Group and Steering Council.

## CORE ROLES

ROLE	RESPONSIBILITY
<b>Planning Facilitator</b>	GTM Ops Strategy Lead. Owns end-to-end planning facilitation, ensures OKR and initiative alignment to Value Streams, monitors Value Stream performance and systemic flow health.
<b>Strategy Leads</b>	Departmental. Represent departmental priorities (Sales, Marketing, CS) during planning and execution. Drive initiative alignment to customer journeys and business outcomes.
<b>Initiative Owners</b>	Cross-functional. Own delivery of initiatives and epics. Manage execution risks and cross-functional collaboration.
<b>GTM Engineers</b>	Build and integrate. Own the data layer, integrations, and AI tooling. Translate AI capabilities into seller and CSM workflow.
<b>Agile Team Members</b>	Execution. Execute Sprint work. Surface blockers. Participate in demos and Inspect & Adapt activities.
<b>Systems &amp; Data</b>	Infrastructure. Maintain CRM, MAP, CS systems, event streams, and data integrity to support operational visibility and AI consumption.

## EXECUTIVE STEERING COUNCIL — STRATEGIC BODY

The strategic command center for GTM Ops. Owns long-range alignment, resource prioritization, major risk management, and strategic accountability for value delivery.

- **Alignment.** Sets and approves annual and quarterly OKRs tied to Value Streams and revenue goals.
- **Resource allocation.** Approves initiative funding, staffing, and technology investment based on strategic priorities and capacity planning.
- **Risk escalation.** Reviews major ROAM risks escalated from the Working Group; acts rapidly to unblock critical issues.
- **Portfolio oversight.** Owns high-level Lean Portfolio Kanban and Program Board approvals — activation, deferral, or pivot of major initiatives.
- **I&A sponsorship.** Sponsors quarterly Inspect & Adapt events, reviews systemic blockers, drives systemic solutions into future planning cycles.

*Cadence.* Monthly Strategic Review (KPIs, OKRs, ROAM status, roadmap health). Quarterly Extended Review following Inspect & Adapt.

## CROSS-FUNCTIONAL WORKING GROUP — TACTICAL BODY

The tactical engine room for execution. Ensures quarterly plans are realistic, risks are managed early, and cross-functional flow stays unblocked.

- **Planning facilitation.** Organizes and runs the two-day Quarterly Planning event. Builds the Program Board. Maps initiatives, risks, and dependencies.
- **Portfolio & intake.** Maintains the Portfolio Kanban. Triage all incoming work against capacity and Urgency × Importance.
- **Risk & dependencies.** Owns the ROAM Board. Resolves minor risks internally. Escalates critical risks to the Executive Steering Council.
- **Sprint support.** Supports teams by unblocking cross-functional issues. Keeps Program Board current.
- **Continuous improvement.** Captures lessons from retros and Inspect & Adapt. Feeds systemic improvements into the next quarterly planning cycle.

*Cadence.* Weekly Execution Sync — board status, work intake review, ROAM updates.

## KEY GOVERNANCE PRINCIPLES

- **Push decisions down.** To the Working Group where possible. Escalate only high-impact risks or major strategic pivots.
- **Operate with full visibility.** Portfolio Kanban, Program Board, ROAM Board, OKRs, and KPIs are accessible to all stakeholders.
- **Timebox escalations.** Risk decisions are made on a clock — to maintain execution speed.
- **Govern for flow, not control.** Governance accelerates the movement of value across streams — it does not micromanage delivery teams.

# Three phases to a working loop.

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Successfully implementing the Operating Loop requires phased adoption — first laying the strategic foundation, then launching execution, then scaling based on early lessons learned. The phases drive momentum, build confidence, and create measurable wins early.

## PHASE 01 — FOUNDATION

*Objective.* Establish strategic context, readiness, and basic infrastructure.

- **Sponsorship.** Confirm Executive Steering Council membership. Secure visible buy-in for the converged GTM Ops function.
- **Function mapping.** Inventory where GTM Ops work currently sits across the org — systems, data, planning, intake, AI tooling.
- **Value Stream map.** Map major GTM Value Streams (Lead-to-Cash, Onboard-to-Renew). Capture baseline KPIs.
- **Initial OKRs.** Draft first quarterly company and departmental OKRs aligned to Value Stream improvements.
- **Governance.** Stand up the Working Group with representation across operational disciplines. Define RACI for initiative ownership, backlog, and risk escalation.
- **Tooling.** Set up Portfolio Kanban, Program Board, OKR dashboards, and ROAM templates.

## PHASE 02 — LAUNCH

*Objective.* Conduct first formal Planning event for the remainder of the quarter and begin sprint execution.

- **Planning event.** Host a 2-day Planning workshop: OKR review, initiative scoping, Program Board build, ROAM session, commitment.
- **Sprint cadence.** Begin two-week sprints. Hold Sprint Planning, Standups, Reviews, and Retros. Reserve 20% buffer capacity.
- **Governed intake.** Route new inbound requests through the Work Intake Form. Triage backlog using Urgency × Importance.
- **Risk discipline.** Populate and maintain the ROAM board weekly. Working Group handles minor risks; major escalations to Steering Council.

## PHASE 03 — SCALE & IMPROVE

*Objective.* Inspect performance, run a full Inspect & Adapt cycle, and prepare for the next Quarterly Planning.

- **I&A workshop.** Demo initiative results, grade OKRs, review ROAM, run root cause analysis, build Improvement Backlog.
- **Q2 planning prep.** Draft next quarter's OKRs and pre-triage proposed initiatives based on lessons learned.
- **Dashboards.** Build out enhanced visibility: real-time OKR tracking, sprint velocity, dependency maps, Value Stream KPIs.
- **Ops calendar.** Publish a 12-month cadence calendar: Planning dates, I&A windows, governance syncs, sprint schedules.

# AI amplifies a working system. It doesn't create one.

GTM is being rewritten in real time. Signal-capture engines, intent platforms, automated outreach, account prioritization models, AI SDRs, agentic workflows — the tooling layer is multiplying faster than any single legacy function can absorb. Most organizations respond the way they always do: buy tools per department, layer them into existing processes, and hope integration takes care of itself.

It doesn't. The teams winning with AI in GTM are not the ones with the most tools. They are the ones with the operating muscle to evaluate, integrate, prioritize, and continuously improve the AI layer as part of a coherent revenue system.

*AI rewards the operating model underneath it. Without one, every new tool just makes the existing chaos faster.*

## WHY IT HAS TO BE CROSS-FUNCTIONAL

Modern AI in GTM is structurally cross-functional. The tools, the data, and the consequences all cross departmental lines:

- **It cuts across functions.** A signal-capture engine touches Marketing, SDR, Sales, and CS simultaneously. An AI SDR creates pipeline that Sales has to qualify and CS has to onboard.
- **It depends on the operational layer.** Data quality, account structure, CRM matching, routing logic, suppression rules — these decide whether AI signals become pipeline or noise. All of it is GTM Ops domain.
- **It must be evaluated against revenue impact.** Not feature lists, not vendor demos. Only GTM Ops can measure tool ROI end-to-end.
- **It surfaces fast and breaks slowly.** Without governance, cost compounds: orphaned integrations, duplicated data flows, conflicting models, and seller workflows that quietly degrade.

## WHERE IT LANDS — AI MEETS THE OPERATING LOOP

PHASE	WHAT AI DEMANDS	WHAT THE LOOP PROVIDES
<b>Align</b>	Evaluate AI investments against revenue outcomes, not vendor narrative.	Quarterly prioritization against Value Stream impact and committed OKRs.
<b>Deliver</b>	Integrate new AI tooling without disrupting frontline GTM motion.	Two-week sprints with 20% capacity reserved for experimentation and emergent work.
<b>Adapt</b>	Continuously test which AI investments are paying off and which are signal noise.	Inspect & Adapt cycles that grade outcomes against KPIs and feed the next quarter.

# Built for the convergence already in motion.

The Operating Loop is not a new process. It's the operating model the convergence has been pointing toward all along — the scaffolding that lets the convergence actually work, and the cadence that lets the merged function operate at AI-era velocity. They create a predictable, transparent, and highly adaptable revenue engine — one that ties every action back to customer outcomes and business impact, and that is structurally ready for the AI-powered GTM environment that's already here.

FROM SILOED ADJACENCY TO CONVERGED OPERATIONS

OLD MODEL

AGILE GTM OPS OPERATING LOOP

**Disparate, siloed disciplines each owning a fraction**

One converged GTM Ops function with neutral cross-functional authority

**Quarterly goals disconnected from work execution**

OKRs cascade into Initiatives, Epics, Stories, and Sprints

**Siloed team planning and firefighting**

Unified Quarterly Planning across Value Streams

**Reactive risk management**

Proactive ROAM-driven risk mitigation

**Annual-only strategic planning**

Continuous Inspect & Adapt rhythm every quarter

**AI tools layered without an operating model**

AI integrated through Value Stream prioritization

12 / CONNECT WITH THE AUTHOR

## Let's think together.

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