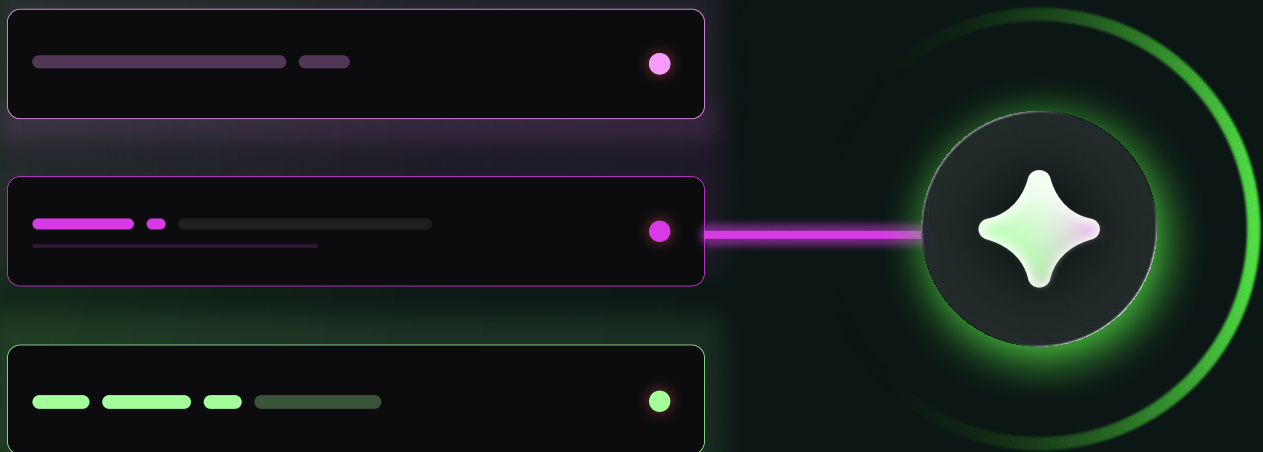


What portfolio companies **should fix** before spending another dollar on AI

How to rebuild CRM foundations, deploy enterprise-grade automation, and create measurable pipeline in 90 days.



"Get the order right, and every dollar spent on marketing and AI works harder. Build on unreliable data, and even the best tools keep optimising around the wrong commercial picture."

AI has changed the economics of go-to-market. It has also raised the **cost of getting the foundation wrong.**

Every PE portfolio marketing plan now includes some version of AI: AI SDRs, AI-led account-based marketing, AI content, customer success automation, and faster commercial reporting. These tools promise greater output from lean teams and a faster route from market insight to pipeline.

The system underneath them is often less reliable. CRM records are out of date. Categories reflect a platform taxonomy rather than the way the business actually sells. Historic migrations, leadership changes, and inconsistent ownership have created layers of data debt. AI uses whatever foundation it is given, so weak inputs travel quickly through targeting, personalisation, forecasting, and reporting.

For PE-backed businesses, the consequences spread beyond one campaign. Legacy systems, several stakeholder groups, live revenue workflows, and years of accumulated history raise the stakes. A simple clean-up or automation project can touch a million contacts, board reporting, customer communications, and day-to-day sales behaviour.

This report sets out a PE-grade model for go-to-market engineering. It explains why the CRM becomes the first fix, how to decide which changes can move quickly, what a credible first 30, 60, and 90 days should produce, and how to connect every build to pipeline and revenue.

THE CENTRAL IDEA

Go-to-market engineering creates leverage when data, systems, human judgement, and commercial execution are designed as one operating model.

-
- 01** Why go-to-market engineering matters now
The commercial system behind the term, and where lean teams gain leverage.
-
- 02** Why PE-backed businesses need a different standard
The legacy, risk, adoption, and governance conditions that change the build.
-
- 03** Why the CRM becomes the first fix
How data debt, taxonomy, and ownership shape every downstream decision.
-
- 04** How poor data breaks the AI stack
The compounding error that reaches SDR, ABM, content, customer success, and reporting.
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A five-question check for deciding whether to pilot, stage, or control a build.
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How a one-person marketing function created more than \$2.5M in pipeline.
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-
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How systems, AI, storytelling, and human execution fit together.
-

Why go-to-market engineering matters now

The commercial system behind the term

Go-to-market engineering applies an engineering mindset to the commercial system. It treats CRM data, audience definition, research, workflow, automation, campaign activation, sales action, and reporting as connected infrastructure rather than a collection of isolated tasks.

The objective is leverage. A small group can perform work that once required several SDR, BDR, rev ops, sales, and marketing roles because repeatable activity is handled by systems. People can spend more time on commercial judgement, customer context, creative thinking, and the exceptions that matter.

The label is relatively new, while much of the work is familiar. CRM strategy, ICP modelling, revenue operations, data enrichment, campaign orchestration, and sales enablement have existed for years. AI has increased the speed, flexibility, and reach of those capabilities. It has also made the quality of the underlying architecture more visible.

WHERE ENGINEERED LEVERAGE APPEARS

COMMERCIAL JOB	TRADITIONAL CONSTRAINT	ENGINEERED LEVERAGE
Account research	People research accounts one by one.	Agents collect, summarise, and refresh relevant context for human review.
Segmentation	Static lists rely on broad fields and periodic updates.	Evidence-based ICPs combine revenue history, fit, exclusions, and live signals.
Outreach	Teams build sequences and briefs manually.	Systems create prioritised actions, with people controlling judgement and message quality.
Content activation	Assets sit in separate channels and workflows.	One commercial story is adapted across sales, email, LinkedIn, reports, and events.
Reporting	Activity is measured separately from revenue.	Data connects engagement, sales acceptance, qualified pipeline, and commercial movement.

Why the **timing matters** for PE



Portfolio companies are expected to protect growth while keeping operating models lean.



AI tools have reduced the cost of production, research, enrichment, and orchestration.



Commercial data has become more complex, more connected, and faster to decay.



Boards need a clearer line from marketing investment to pipeline and revenue.



A repeatable operating method can be applied across assets without forcing identical execution.

"The strongest GTM engineering work starts with the customer and the commercial problem. Technology is selected after the operating need is clear."

Why PE-backed businesses need a different standard

Speed has to sit alongside safety, adoption, and revenue impact

Go-to-market engineering developed quickly in startup and scale-up environments. Those teams often have smaller datasets, fewer legacy systems, shorter decision chains, and more freedom to test new tools. A failed experiment can usually be isolated and reversed without disturbing a mature revenue engine.

PE-backed businesses usually inherit a different operating reality. Many are more than a decade old. Their data has moved from spreadsheets into one CRM and then another. Sales leaders, CFOs, operations teams, and rev ops owners have changed. New fields, workarounds, integrations, and reporting conventions have been added over time. The CRM has become a record of organisational history as much as a commercial system.

A real PE-grade data challenge

One PE-owned business asked OrbitalX to clean a CRM containing more than one million contacts, connected to systems developed over a 40-year operating history. The work required far more than a plug-in tool. Every dependency, stakeholder, and live workflow had to be understood before changes could be trusted.

TYPICAL OPERATING CONDITIONS

Dimension	Common early-stage condition	Common PE portfolio condition
Architecture	A relatively clean or recently built stack.	Inherited systems, integrations, and undocumented workarounds.
Data volume	Smaller account and contact universe.	Large datasets with historic duplicates, stale records, and mixed ownership.
Stakeholders	One team can approve and change a workflow.	Sales, marketing, finance, operations, customer success, IT, and leadership may all depend on it.

Dimension	Common early-stage condition	Common PE portfolio condition
Risk	Experiments can often be isolated.	Changes can affect forecasting, customer communication, reporting, and live pipeline.
Success measure	Speed to test and learn.	Speed, control, adoption, data integrity, and commercial impact.

FIVE PRINCIPLES FOR PE-GRADE GTM ENGINEERING

- 01 Map the system before changing it. Understand data flows, integrations, permissions, reporting dependencies, and the teams that rely on them.
- 02 Design around the commercial problem. Select tools and workflows after the customer, market, and revenue objective are clear.
- 03 Stage high-risk changes. Use samples, sandboxes, approval gates, audit trails, and rollback plans when a build touches live revenue infrastructure.
- 04 Build trust into delivery. Involve the people who will use the system so the new process becomes part of day-to-day work rather than a disconnected experiment.
- 05 Keep humans in the loop. Automation handles repeatable work; people retain responsibility for judgement, exceptions, narrative, customer context, and final action.

"A technically correct system still fails when the organisation does not trust it enough to use it."

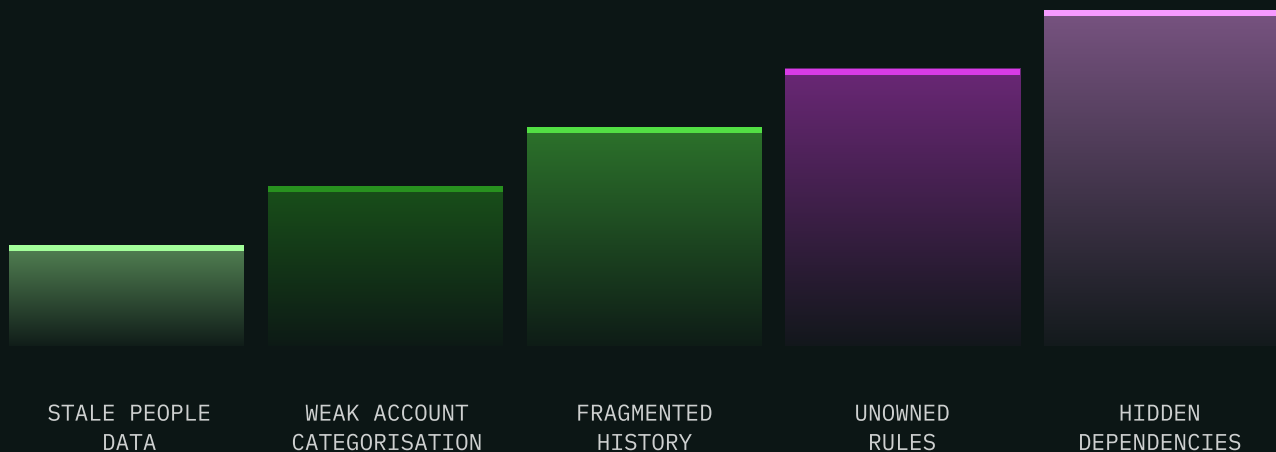
Why the CRM becomes the **first fix**

Every AI and marketing layer inherits the quality of the data beneath it

Portfolio marketing teams often begin with a visible need: a new campaign, an AI SDR, a content engine, a website refresh, or an account-based programme. In OrbitalX engagements, the most valuable starting point is frequently the CRM because every downstream activity relies on it.

Marketing uses the CRM to define audiences. Sales uses it to prioritise accounts and forecast. Customer success uses it to identify expansion and retention opportunities. Finance and leadership rely on it to understand commercial movement. When records are inaccurate, out of date, or organised around the wrong categories, the whole machine begins with a distorted view of the market.

HOW CRM DEBT ACCUMULATES



Form of debt	What it looks like	Commercial consequence
Stale people data	Contacts have changed roles, left the company, or moved outside the buying group.	Outreach reaches the wrong people, coverage appears stronger than it is, and follow-up is wasted.
Weak account categorisation	Industry, size, use case, and market context do not reflect how the business wins.	ICP scoring produces false positives, segments become too broad, and messages lose relevance.

Form of debt	What it looks like	Commercial consequence
Fragmented history	Migrations, duplicates, merged accounts, and conflicting fields create several versions of the truth.	Revenue analysis, attribution, and forecasting become unreliable.
Unowned rules	No clear owner, refresh cadence, field definition, or exclusion logic exists.	Data quality falls again after a one-off clean-up.
Hidden dependencies	Fields feed reports, workflows, integrations, and customer communications that are poorly documented.	A simple change can break live processes or create unanticipated risk.

DATA DECAY CREATES FALSE CONFIDENCE

20-30%

ERRONEOUS DATA

OrbitalX project experience suggests that even established enrichment sources can contain 20-30% erroneous data. Six months of unmanaged role changes, company movement, and market change can materially weaken the intelligence layer. The CRM can still look full while its commercial usefulness has collapsed.

A STANDARD TAXONOMY CANNOT DESCRIBE EVERY BUYING CONTEXT

434

CODES

LinkedIn Industry Codes V2 contains 434 codes across a multi-level hierarchy. The taxonomy is useful for standardisation, yet real markets contain far more operating models, specialisms, use cases, and buying situations. A broad label can hide very different businesses with very different reasons to buy.

Consulting illustrates the problem. A paid media specialist, a search consultancy, a transformation adviser, and a storytelling consultancy may share a broad category while selling to different buyers, solving different problems, and creating different revenue profiles. A CRM built around categories that do not match the real sales motion creates false precision.

THE CRM READINESS CHECKLIST

- ☒ Priority account segments reflect actual customer value, retention, expansion, sales cycle, and product fit.
- ☒ Key contacts and buying roles are verified across the accounts that matter most.
- ☒ Competitors, existing customers, partners, and irrelevant accounts are excluded consistently.
- ☒ Firmographic and commercial fields have clear definitions and owners.
- ☒ Duplicates, conflicting records, and migrated histories have an agreed resolution process.
- ☒ Critical integrations and downstream reports are mapped before changes are made.
- ☒ Data refresh, permission, audit, and quality-control rules are part of the operating model.

"CRM hygiene is a growth decision. It determines who the business sees, what it believes about them, and where every sales and marketing system focuses next."

How poor data **breaks** the AI stack

The error compounds as it moves from record to action

AI makes commercial systems faster. It can research accounts, enrich data, score fit, draft messages, build sales briefs, create content, and summarise performance. Each output inherits the assumptions and inaccuracies already present in the source data.

CRM foundation

Accounts, contacts, history, ownership

Audience intelligence

ICP, segments, buying groups, signals

AI and automation

Agents, scoring, enrichment, workflows

Market activation

Sales action, content, campaigns, customer plays

Commercial outcome

Engagement, meetings, pipeline, revenue

WHAT BREAKS DOWNSTREAM

AI SDR

Outreach goes to outdated contacts, unsuitable accounts, or the wrong stakeholders. Personalisation becomes confidently irrelevant.

AI-led ABM

Account scoring rewards broad firmographic fit while missing the real use case, buying context, urgency, or revenue quality.

AI content

Themes are generated from shallow audience definitions, so output becomes generic and difficult for sales to use.

AI customer success

Expansion and retention plays rely on incomplete customer context, inaccurate ownership, or missed product and relationship signals.

Forecasting and planning

Coverage, attribution, conversion assumptions, and board reporting are built on records that do not reflect the current market.

Performance analysis

A weak response is blamed on the channel or message even when the deeper failure sits in targeting, categorisation, or data quality.

THE COMPOUNDING ERROR PATTERN

- 1 An account is placed in an overly broad or inaccurate category.
- 2 The ICP and scoring model treat that category as evidence of fit.
- 3 An agent selects the account and identifies the wrong buying role.
- 4 The sequence uses a plausible message that does not reflect the account's real context.
- 5 Engagement is weak, and the dashboard concludes that the campaign or channel failed.
- 6 The team invests in more tools or creative without correcting the foundation.

WHY THE HUMAN LAYER REMAINS ESSENTIAL

Systems are strong at

Collecting, refreshing, matching, and summarising data at scale.

Identifying patterns, signals, and next-best actions.

Orchestrating repeatable workflows across tools and channels.

Producing first drafts, briefs, and structured outputs quickly.

Humans remain responsible for

Defining the market, ICP, exclusions, and commercial objectives

Deciding which signals matter and interpreting exceptions.

Protecting customer context, trust, risk, and organisational adoption.

Creating a distinctive story, exercising judgement, and approving final action.

"The engineering layer creates speed and consistency. The human layer decides what is worth doing, what is safe to scale, and what the market should hear."

The PE-grade rollout test

Five questions to decide how quickly a build can move

PE teams need a practical way to separate an isolated pilot from a change that deserves controlled deployment. The following test turns the main sources of risk into five questions that can be answered before a tool is connected or a workflow is switched on.

QUESTION	WHY IT MATTERS	EVIDENCE TO COLLECT
How much data does the change touch?	Scale increases the impact of duplicates, misclassification, permission errors, and unintended actions.	Record volume, data types, customer/prospect status, sensitive fields, and sample quality.
Which systems depend on the data?	CRM fields may feed forecasting, BI, customer success, finance, product, and live communications.	Integration map, field dependencies, workflows, reports, and downstream owners.
Can the change be isolated and reversed?	A reversible test allows faster learning. An irreversible migration needs stronger control.	Sandbox or sample design, audit log, approval gate, rollback plan, and backup.
How many teams will act on the output?	Adoption and trust become critical when sales, marketing, operations, and leadership share the system.	Stakeholder map, decision rights, training, ownership, and feedback process.
How close is the change to live revenue?	Errors are more serious when they affect active pipeline, customer communication, forecasts, or board reporting.	Commercial use case, risk scenario, success metric, and 30-day revenue checkpoint.

CHOOSE THE DEPLOYMENT PATH

RISK PROFILE	RECOMMENDED APPROACH	MINIMUM CONTROLS
FAST PILOT	Use for a small, isolated, reversible use case with limited data and a clear owner.	Sample data, human review, baseline, and a defined stop condition.
STAGED DEPLOYMENT	Use when several functions or integrations are involved, but the work can be rolled out by segment or workflow.	Sandbox, QA sample, stakeholder sign-off, audit trail, phased activation, and rollback.
CONTROLLED BUILD	Use when the change touches large datasets, legacy systems, customer operations, forecasts, or board-level reporting.	Dependency mapping, governance, security review, migration plan, human oversight, and formal acceptance.

THE PRACTICAL RULE

Move quickly where the system is isolated and reversible. Increase control as data volume, legacy dependency, stakeholder reach, and revenue exposure rise.

GUARDRAILS THAT SHOULD EXIST IN EVERY PATH

- A named owner for the data, workflow, and commercial outcome.
- A documented baseline so impact can be measured honestly.
- A representative QA sample before wider activation.
- A clear human approval point for high-impact actions.
- A rollback or stop condition that can be used immediately.
- A 30-day checkpoint tied to leads, pipeline, revenue, or another agreed commercial signal.

The 30-day board benchmark

What leadership should expect before the wider transformation is complete

A PE portfolio company does not need a year before the work becomes commercially useful. Within 30 days, leadership should have a clearer view of the data risk, a sharper account focus, one priority motion in market, and early evidence of whether the right audience is responding.

OrbitalX uses an internal commercial checkpoint within the first month: is the work beginning to drive leads, pipeline, revenue, or a credible precursor to them? That question prevents GTM engineering from becoming a technical project with no line of sight to growth.

Source: OrbitalX project experience and expert interview, August 2026.

A BOARD-READY SCORECARD

Area	Board or investment committee question	Evidence by day 30	G / A / R
Foundation	What was wrong with the existing system, and where is the commercial risk?	Quantified data gaps, dependency map, ownership issues, and prioritised remediation.	
ICP and account focus	Do we know which accounts and stakeholders matter most?	Evidence-based priority segments, exclusions, buying roles, and account coverage.	
Activation	Has the work moved beyond diagnosis?	One controlled use case live, such as dormant account activation, AI SDR, signal-led ABM, or expansion.	
Adoption	Are sales and marketing using the output?	Usage, sales acceptance, qualitative feedback, and clear owners for next action.	
Commercial movement	Is the right market responding?	Target account engagement, meetings, qualified opportunities, pipeline influence, or revenue evidence.	
Control	Can leadership trust the build?	QA results, audit trail, permissions, human approval, rollback, and data refresh rules.	

HOW TO READ THE BENCHMARK

GREEN



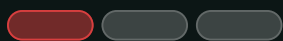
Data risk is understood, a priority motion is live, adoption is visible, and early commercial signals are appearing.

AMBER



The foundation is improving, but activation, adoption, or response is delayed or still unclear.

RED

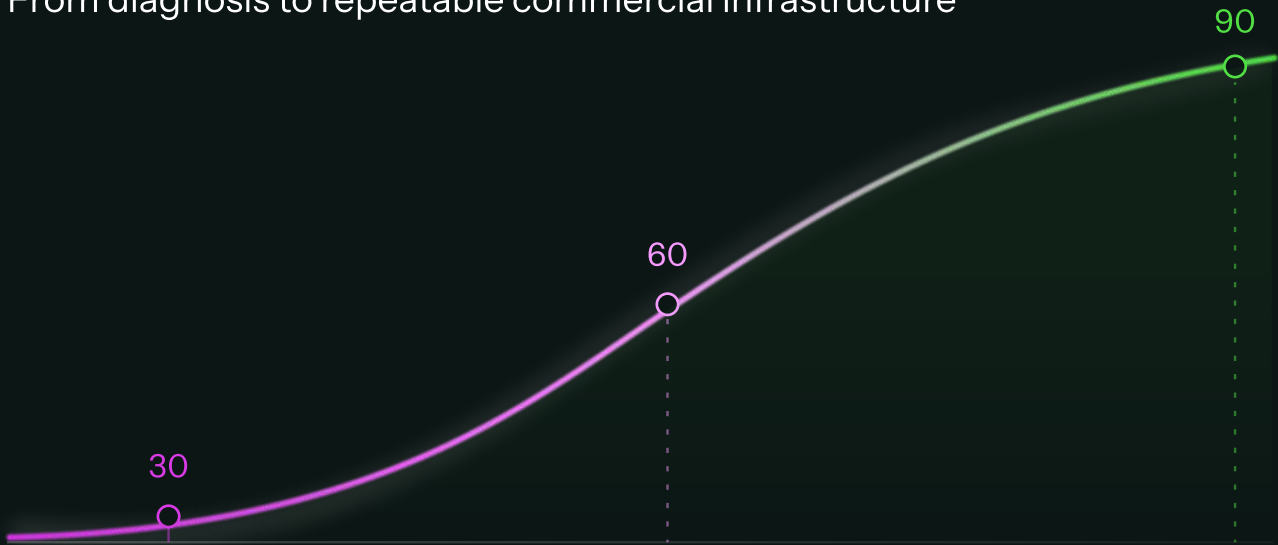


A tool has been deployed without a reliable baseline, clear ownership, safe controls, or a credible connection to revenue.

"The first 30 days should produce evidence, not theatre: a clearer commercial picture, a safer foundation, and a live test of whether the right market will move."

The 30/60/90-day roadmap

From diagnosis to repeatable commercial infrastructure



The sequence matters. Cleaning every record before taking action can delay value. Deploying AI across the full CRM before understanding the data can multiply risk. A practical programme improves the foundation around the highest-value commercial use case, activates early, and expands as evidence grows.

DAYS 1-30

Diagnose and activate

CORE ACTIONS:

Map the CRM, integrations, workflows, owners, and reporting dependencies. Sample data quality. Reconstruct the ICP from revenue, retention, expansion, sales-cycle, and fit. Define exclusions and priority buying roles. Select one use case with a clear line to pipeline. Build a human-reviewed workflow and establish the board benchmark.

WHAT TO MONITOR:

Verified account and contact coverage, data quality issues, sales acceptance, target account engagement, meetings, qualified pipeline, revenue signals, and control failures.

EXPECTED OUTPUT:

A CRM risk map, evidence-based ICP, priority account universe, first workflow live, and early evidence of commercial movement.

DAYS 31-60

Build and optimise

CORE ACTIONS:

Clean and enrich the priority segments rather than the entire CRM blindly. Introduce live signals, scoring, sales briefs, outreach, content, or customer plays around the selected use case. Improve human QA, feedback loops, and sales-marketing handoff. Connect activity to opportunity and pipeline reporting.

WHAT TO MONITOR:

Accuracy by sample, engagement by segment, response and meeting conversion, sales usage, pipeline progression, message performance, and recurring data issues.

EXPECTED OUTPUT:

A working intelligence layer, more reliable prioritisation, refined messaging, stronger adoption, and clearer evidence of what deserves further investment.

DAYS 61-90

Scale and systemise

CORE ACTIONS:

Expand successful workflows into adjacent segments, use cases, or portfolio companies where relevant. Document data ownership, refresh cadence, permissions, exception handling, and human approval. Build repeatable playbooks and decide which capability should remain partner-led, become internal, or operate at portfolio level.

WHAT TO MONITOR:

Repeatability, time saved, pipeline contribution, forecast quality, account coverage, adoption, governance, and the performance of each use case against the baseline.

EXPECTED OUTPUT:

An AI-ready GTM system, documented operating playbook, portfolio-level benchmark, and a clear plan for the next phase of growth.

WHAT THE ROADMAP IS DESIGNED TO AVOID

- A year-long data programme that produces no market activity.
- A fast tool deployment that creates noise or risk before the foundation is understood.
- A one-off clean-up with no owner, refresh process, or operating change.
- A technical build that sales, marketing, and customer teams do not adopt.
- Activity reporting that cannot show whether pipeline or revenue is improving.

"Diagnose enough to move safely. Activate enough to create evidence. Scale only after the system has earned trust."

CASE STUDY:

Cylindo built pipeline **without building a marketing department**

How a one-person function created board-level results during a rebuild

Jennifer Rasmussen joined Cylindo, now part of Chaos, as Chief Marketing Officer in July 2025. She inherited a strong 3D visualisation product and ambitious H2 growth expectations, but no broader internal marketing team and no additional headcount budget for the year.

The business needed clearer positioning, sharper account focus, fresh demand generation, and stronger sales enablement. It also needed a system that could move quickly without forcing a first-time CMO to build, brief, and manage a traditional department during a critical commercial phase.

THE OPERATING MODEL

OrbitalX worked as an embedded B2B marketing and growth partner, combining strategic counsel, audience and data work, campaign execution, and human delivery.

The model gave Cylindo access to specialist capability without adding operational complexity to the internal team.

AUDIENCE AND DATA:

Development of clearer ideal customer profiles and a stronger database.

THOUGHT LEADERSHIP:

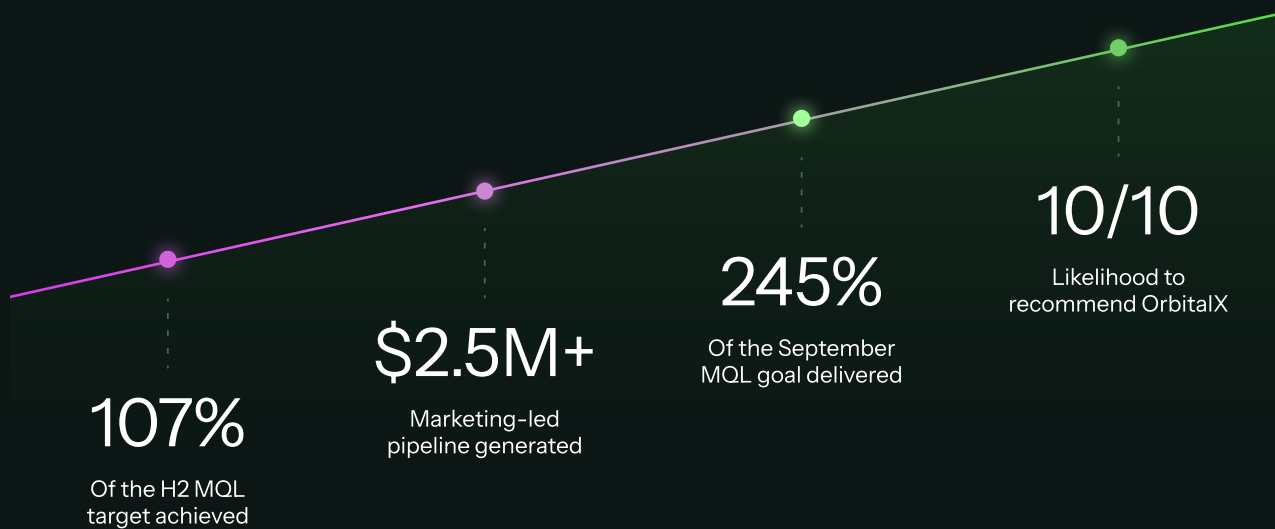
Commercial assets tied to real buyer problems, including returns and modular product complexity.

SALES ENABLEMENT:

Rewritten sales decks, one-pagers, and case studies grounded in customer proof.

PERFORMANCE CONTENT:

A campaign engine designed for speed, craft, consistency, and measurable demand.



Source: OrbitalX Cylindo case study.



They helped me move at speed, without sacrificing quality.

Jennifer Rasmussen, Chief Marketing Officer at Cylindo



WHY THE CASE MATTERS FOR PE

The result came during a rebuild and without the company recreating a full internal marketing department. A tailored system surrounded a lean leader with audience intelligence, strategy, execution, sales support, and reporting. The work moved fast because it was built around Cylindo's commercial context rather than an off-the-shelf motion.

For PE funds and portfolio companies, the lesson is practical. Headcount is only one form of capacity. A well-designed GTM system can give a lean team the leverage, specialist depth, and executional firepower required to create pipeline while a permanent operating model evolves.

From one asset to a portfolio capability

Standardise the operating method, then adapt the build to each business

The portfolio advantage comes from repeatability. PE firms can use a common diagnostic, rollout test, 30-day benchmark, governance standard, and reporting model across assets. Each company still requires its own ICP, data model, use case, market narrative, integration map, and pace of deployment.

A shared operating standard makes performance easier to compare. It also helps the fund identify where data risk is highest, which teams can move quickly, where pipeline is under-supported, and which successful plays can be adapted elsewhere.

WHAT TO COMPARE ACROSS THE PORTFOLIO

READINESS DIMENSION	WHAT IT REVEALS	PORTFOLIO ACTION
CRM INTEGRITY	The reliability of account, contact, history, ownership, and integration data.	Prioritise assets where data risk is blocking several commercial functions.
ICP CLARITY	Whether the company can define valuable accounts, buyers, exclusions, and use cases with evidence.	Support assets where broad targeting is wasting sales and marketing capacity.
SYSTEM DEPENDENCY	The level of legacy complexity, live workflow risk, and stakeholder reach.	Choose the right rollout path and governance before changing the stack.
ACTIVATION CAPACITY	Whether the team can turn insight into campaigns, sales action, content, and customer plays.	Provide embedded execution where lean teams lack the final-mile capacity.
COMMERCIAL EVIDENCE	Whether activity is creating engagement, meetings, qualified pipeline, and revenue movement.	Scale the plays with the strongest evidence and stop those producing noise.
OPERATING OWNERSHIP	Whether data, systems, QA, refresh, adoption, and reporting have named owners.	Build durable capability rather than repeating one-off clean-ups.

THE PORTFOLIO SEQUENCE

- 01 Benchmark selected assets using the same readiness dimensions.
- 02 Prioritise the builds with the clearest commercial upside and the most manageable risk.
- 03 Capture the diagnostic method, controls, workflow structure, and reporting cadence from successful engagements.
- 04 Adapt the ICP, narrative, data, integrations, and channel mix to the next company's context.
- 05 Create a portfolio view of readiness, adoption, pipeline evidence, and capability gaps.

"The portfolio should share an operating standard, not a generic playbook. Repeat the method. Preserve the market context."

The engineered PE marketing function

Systems create leverage. Storytelling and judgement create distinction.

Marketing is becoming more systemised and more AI-centric. The role of the marketing engineer is beginning to appear: a person who can connect commercial thinking with CRM architecture, automation, data, agents, and measurement. In some organisations, every marketer may work beside a GTM engineer. In others, the marketer will develop more engineering capability directly.

This shift increases the value of the human edge. When every business can generate content, build sequences, and summarise account research, generic output becomes abundant. Brand, storytelling, creativity, customer understanding, and commercial judgement give the system something distinctive to distribute.

THE NEW WORKING PARTNERSHIP

GTM engineering

CRM architecture, data quality, enrichment, integrations, automation, agents, orchestration, QA, and reporting.



Marketing and commercial leadership

Customer insight, market narrative, brand, creative direction, proposition, trust, sales alignment, and final judgement.



Shared responsibility

ICP, priority use cases, campaign design, adoption, measurement, pipeline, and revenue outcomes.



THREE PRACTICAL ORGANISATION DESIGNS

MODEL

Lean leader plus embedded partner

HOW IT WORKS

A small internal team owns commercial direction while a specialist partner provides engineering, strategy, and executional capacity.

BEST FIT

A portfolio company that needs speed and depth without immediate permanent headcount.

MODEL

Internal marketing engineer plus specialists

HOW IT WORKS

The business owns core systems capability and brings in specialist human teams for data, campaigns, content, creative, or transformation work.

BEST FIT

A company with recurring use cases and enough scale to internalise the operating layer.

MODEL

Portfolio-level GTM engineering capability

HOW IT WORKS

The fund or operating team provides a common diagnostic, governance, partner network, and playbook across selected assets.

BEST FIT

A portfolio seeking repeatable value creation while allowing local teams to keep market ownership.

"Systems distribute the story. Human insight determines whether the story is worth hearing."

Leadership should protect five things as the function evolves: customer proximity, a distinctive market narrative, commercial accountability, human review, and day-to-day adoption.

CONCLUSION

Fix the **foundation** before scaling the machine

AI investment is becoming a standard part of the PE portfolio growth plan. The order of operations will determine how much value that investment creates.

A reliable CRM gives the business a current view of the market, the accounts that matter, the people involved, and the commercial history behind them. Go-to-market engineering turns that intelligence into repeatable workflows, human action, campaigns, sales support, and measurable pipeline. PE-grade delivery adds the controls, stakeholder trust, and enterprise discipline required to make those systems safe and durable.

The practical sequence is clear: understand the architecture, repair the highest-value data foundation, activate one commercial use case, test for pipeline movement within 30 days, and scale only after the system has earned trust. Across a portfolio, the same operating method creates a common standard while each asset keeps the context that makes its market different.

"Fix the CRM. Engineer the system around the customer. Prove commercial movement early. Scale what can be trusted."

Build your AI-ready go-to-market engine

OrbitalX helps PE funds and portfolio companies diagnose CRM risk, design enterprise-grade GTM systems, and turn cleaner market intelligence into measurable pipeline.

REQUEST A 30-DAY GTM ENGINEERING DIAGNOSTIC

