

The GTM Confidence Index FY26

Closing the Growth Gap

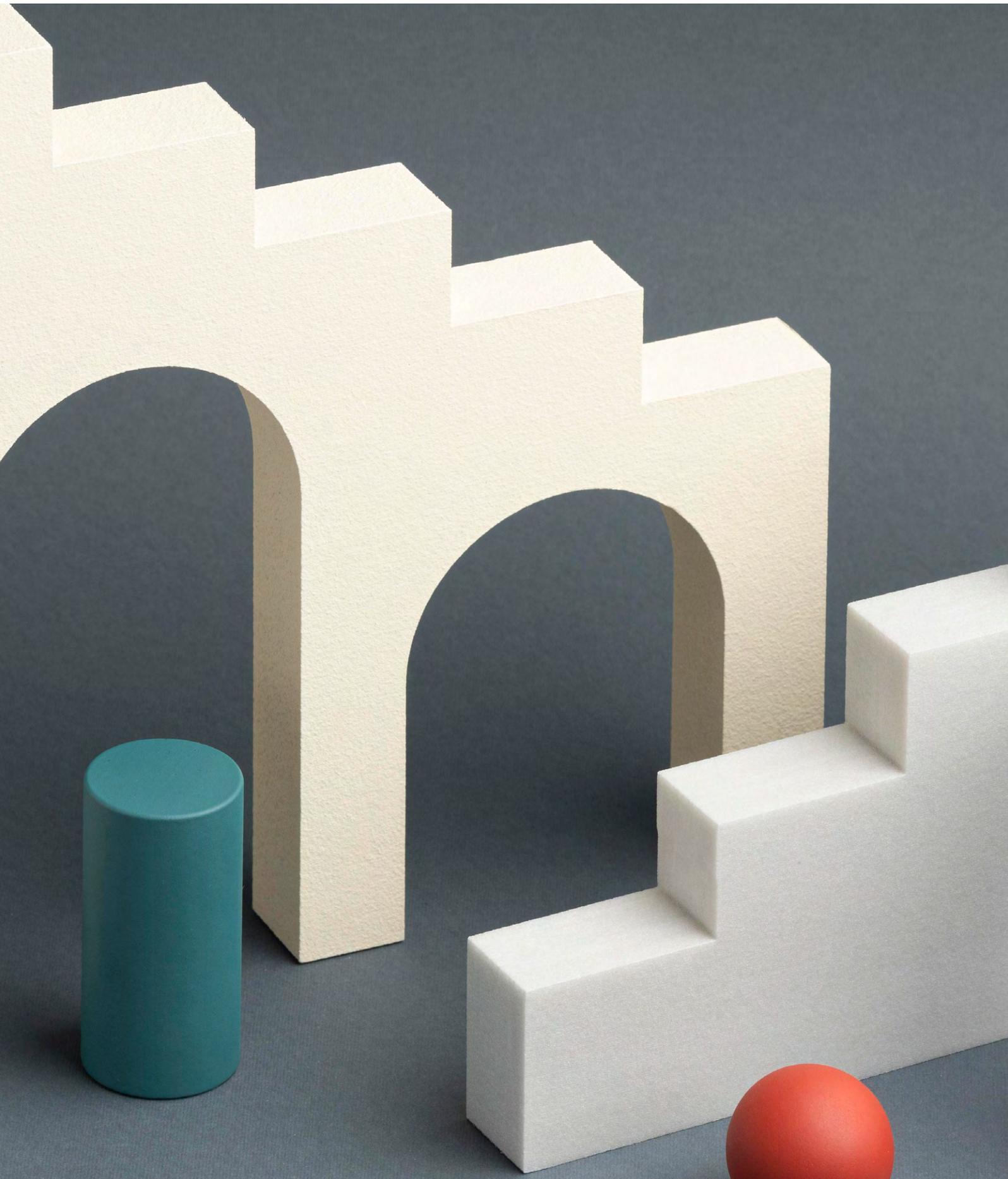




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Executive summary

Ambition is up. Confidence is not. Most commercial leaders are navigating with their foot on the gas but little visibility on the road ahead.

Across boardrooms in mid-enterprise B2B firms and PE-backed portfolios, ambition for 2026 is running hot. Leaders are setting bold growth targets and doubling down on expansion, yet belief in achieving those targets is strikingly scarce. Only one in ten leaders report being highly confident they will deliver. **This is the confidence gap: ambition races ahead, but the fundamentals of execution lag behind.**

This gap matters. For commercial leaders, it signals overstretched teams and fragile delivery capacity. For investors, it threatens predictable returns and undermines exit readiness. Confidence is not sentiment; it is a leading indicator of growth readiness.

KEY FINDINGS

- 1. The confidence gap:** Only 9% of leaders are highly confident in hitting their 2026 growth targets, while 54% are somewhat confident.
- 2. Pipeline is decisive:** Leaders who are very confident in this quarter's pipeline are nine times more likely to feel confident in meeting 2026 growth targets (54% vs 6%).
- 3. Budget and headcount alignment:** Where growth targets are fully supported by budgets and headcount, 20% of leaders are highly confident; where they are not, 63% fall into the low-confidence group.
- 4. Cross-functional support:** Strong organisational backing lifts confidence (26% high); minimal support collapses it.
- 5. AI adoption is uneven:** 88% are exploring or using AI, yet 34% cite lack of skills as the top barrier to making it effective.
- 6. System integration lifts belief:** Leaders with integrated stacks are five times more likely to be highly confident than those with fragmented or manual tools.
- 7. Strategic initiatives divide outcomes:** Leaders entering new markets are more confident (24% high), while confidence collapses for those prioritising M&A or brand repositioning, with almost half reporting low confidence.
- 8. Mid-market squeeze:** Only 3% are highly confident, with most in the medium or low bands.
- 9. Sales-marketing alignment:** Confidence is stronger in organisations with unified teams.

The GTM Confidence Index for FY26 reveals an increasing gap between the bold growth targets being set and organisational belief in achieving them. So why are commercial leaders pushing for acceleration when they have little conviction that they can reach their destination?

Across more than 100 senior B2B leaders surveyed, only 9% report being highly confident in meeting their 2026 growth targets, even as over half describe their organisations as aggressively pursuing growth.

We call this the **confidence gap**: ambition runs high, but execution fundamentals lag behind.

Our data shows that confidence rises sharply when the fundamentals are in place specifically **pipeline discipline, budget and headcount alignment, AI maturity, system integration, and organisational alignment**. Where these are missing, confidence collapses.

To have confidence in the growth they wish to achieve, leaders must strengthen the operational architecture that converts ambition into predictable execution.

WE HAVE IDENTIFIED FIVE KEY GAPS IN ORGANISATIONS THAT LADDER UP TO THE CONFIDENCE GAP:

1. Pipeline to Conversion

Ambition depends on predictability, and that starts with confidence in pipeline quality and conversion.

2. Ambition to Budget

Growth goals often outpace the resources needed to deliver them.

3. AI Adoption to Effectiveness

Experimentation with AI has yet to translate into measurable performance.

4. Martech Tools to Integrated Stack

Modern tools remain fragmented, limiting insight, speed and confidence.

5. Goals to Alignment and Growth

Confidence collapses when commercial functions are not strategically aligned around shared goals.

When ambition outpaces confidence

In 2026, there is a clear disconnect between boardroom goals and the perceived reality of execution. Businesses are setting wildly optimistic ambitions for their teams – but leaders remain cautious about their ability to achieve them.

In our **GTM Confidence Index FY26** our survey of more than 100 B2B leaders, we have identified a striking imbalance – a **confidence gap** – between aspirations and readiness to deliver.

Only **9%** of leaders express high confidence in delivering on 2026 growth targets. More than half (54%) sit in the middle, while over a third (36%) report low confidence. Yet more than half of respondents (54%) describe their organisation as aggressively pursuing growth.

Among that group, just **12%** are highly confident they will achieve it. The finding is consistent across sectors and regions: ambition is rising faster than the systems designed to fulfil it.

The patterns in our data show that confidence is prompted not by an amorphous sentiment but by tangible factors in organisational infrastructure.

High-confidence leaders are more likely to report aligned budgets, strong cross-functional backing, unified sales and marketing, integrated tech stacks, and AI embedded centrally into workflows.

By contrast, lower-confidence peers face resource gaps, weaker organisational support, siloed teams, fragmented technology, and tentative or absent AI adoption.

And if the causes are not merely theoretical, nor are the consequences. Because for commercial leaders, the confidence gap signals **execution strain** – overstretched teams, reactive decision-making, and brittle delivery capacity.

For investors, it undermines the **predictability of returns**, threatening exit readiness and valuation. Confidence is not a mood, then. It is both an outcome and a signifier of success. It reflects the health of the organisational engine, specifically on aligned budgets, cross-functional backing, integrated GTM systems, and AI embedded into workflows.

How confident are you in your organisation's ability to achieve its stated growth targets in the next 12 months?

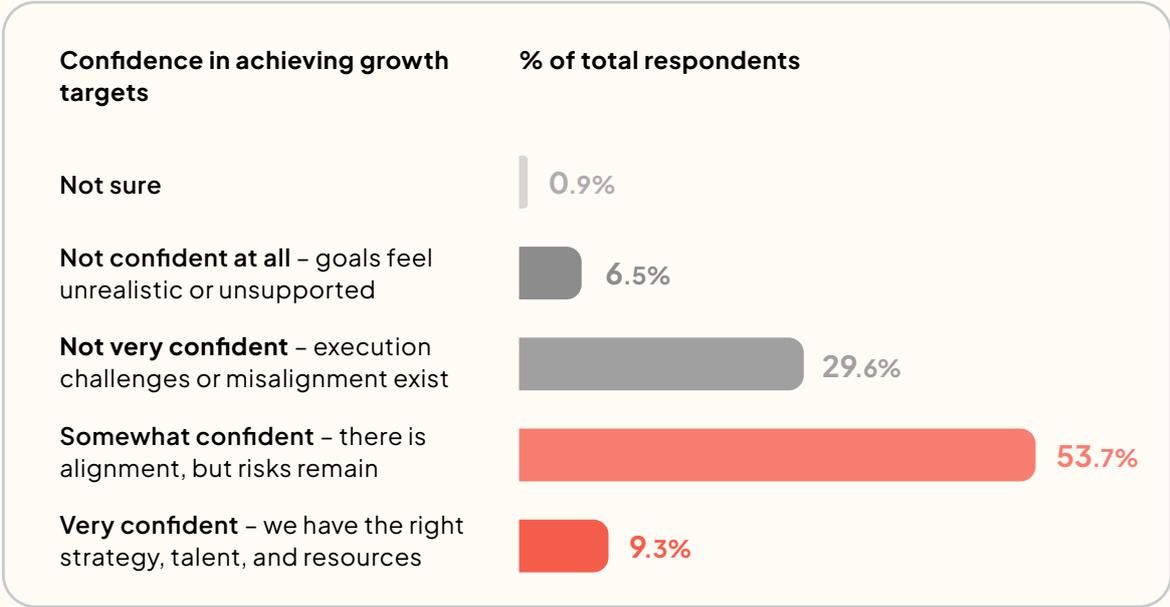


FIGURE 1. Confidence in ability to achieve stated growth targets in the next 12 months. Question asked to 108 leaders: How confident are you in your organisation's ability to achieve its stated growth targets in the next 12 months? Distribution by total respondents.

A spectrum of confidence

Our research indicated that there are clear differences in confidence levels across geographies, business sizes, and ownership types.

- **Regionally**, North American leaders are the most confident, with 22% reporting high confidence. European businesses cluster around the middle, while global or multi-region firms – those managing complexity across markets – show the weakest levels of assurance, with nearly half in the low-confidence group.
- **By company size**, mid-market firms (250–999 employees) are the most strained: only 3% report high confidence. Smaller firms (11–12%) and larger enterprises (13–17%) fare better.
- **Among PE-backed organisations**, the pressure on leaders is highest, with a particularly wide gap between confidence and ambition. While these firms are among the most aggressive in pursuing growth, only 12% of leaders feel very confident in achieving their targets. More than half report flat or shrinking budgets, leaving teams to deliver more with less.
- **Tech leaders** show greater volatility, unsurprisingly given the rapid change and unpredictability of the sector, while their non-tech peers have steadier confidence levels.

Which best describes your organisation's current growth posture?

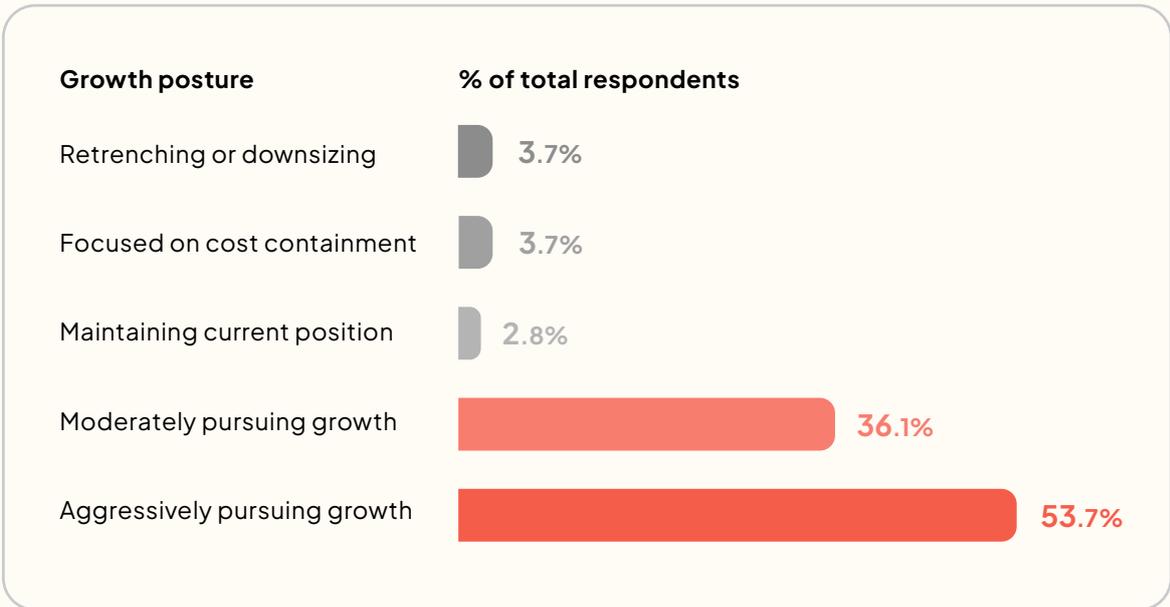


FIGURE 2. Current growth posture of organisations. Question asked to 108 leaders: Which best describes your organization's current growth posture? Distribution by total respondents.

Confidence in Growth Targets by Growth Posture

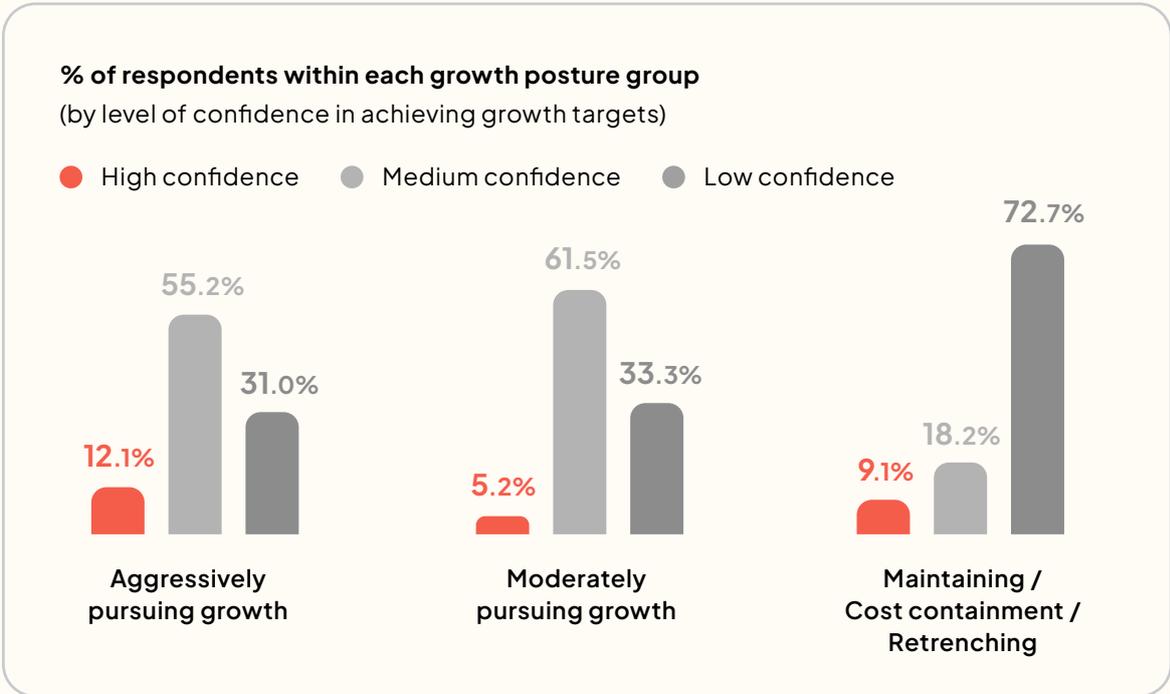


FIGURE 3. Confidence in growth targets by growth posture (Which best describes your organization's current growth posture?)

Confidence or hubris?

Further highlighting the gap between ambition and expected reality is leaders' expected source of growth in the future. When asked where they expect most growth to come from, almost four in five (79%) pointed to new customers in existing markets, and over half (56%) cited expansion of existing customers through upsell or cross-sell.

Far fewer expect growth to be driven by new products (22%), new geographies (21%), or partnerships (17%).

This contrasts with organisational priorities such as expanding into new markets and disruptive initiatives such as M&A or brand repositioning which show no leaders reporting high confidence, with nearly half falling into the low-confidence group.

Growth targets add further context. Leaders aiming for 21–30% revenue growth are the least assured, with 42% in the low-confidence group. Those targeting 30%+ report a slightly higher share of high confidence (17%), though on a smaller base. Organisations with no formal growth target are the least confident, with nearly 80% in the low-confidence group.

This suggests that ambition can be a powerful motivator up to a certain point, but that ambition alone is not enough to raise confidence.

In other words, leaders must balance drive and ambition with a realistic strategy for supporting the business to reach those targets.

Support is not a “soft factor”. It is an operational enabler. Cross-functional backing unlocks resourcing, accelerates decision-making, and ensures GTM priorities are embedded into the wider business. Crucially, it also signals that marketing is recognised as a driver of growth rather than a cost centre. Without this recognition, even well-designed strategies stall in execution.

Tying marketing directly to growth levers drives brand choice, builds trust, and ensures your company shows up on the shortlist. In today's market, people buy from brands they know and believe in, with brand and trust among the foundations of predictable revenue.

Confidence in growth targets by level of organisational support

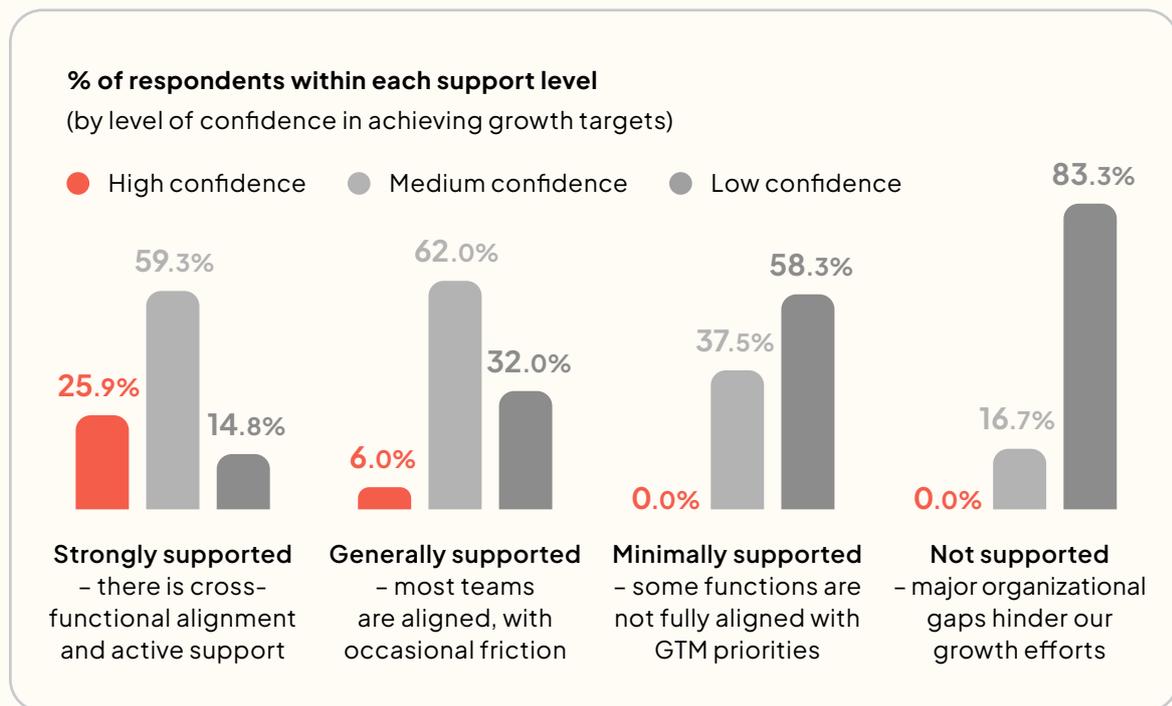


FIGURE 4. Confidence in growth targets by level of organisational support (To what extent do you feel supported by the broader organization (e.g., product, finance, operations) in achieving your growth objectives?)

Five gaps to bridge for confident growth

Closing the confidence gap is more than a simple realignment of ambition and expectation. It is underpinned by the need to develop an organisational culture and infrastructure that proactively supports the growth and goals of the business, rather than acting as a barrier or risking organisational collapse. From our research, we have identified five areas that must be bridged before confidence and ambition can truly be aligned.

1. PIPELINE TO CONVERSION: THE TIPPING POINT FOR PREDICTABILITY

Pipeline conviction is the single strongest predictor of growth confidence. Leaders who are very confident in their current pipeline are **nine times more likely** to be highly confident in meeting 2026 targets (54% vs. 6%). Those without pipeline confidence report no high confidence at all.

This “pipeline to conversion gap” represents the tipping point between aspiration and predictability. In high-confidence organisations, pipeline strength signals that the fundamentals are working – qualification, targeting, sales-marketing alignment, and consistent weekly or bi-weekly review cadences with shared accountability and joint pipeline ownership.

By contrast, **low-confidence teams often chase volume over efficiency. Leads accumulate, but conversion rates erode.** Nearly half of respondents say their growth strategy now emphasises making existing demand count by sharpening qualification, improving targeting, and tightening hand-offs between functions.

When asked where they see the biggest opportunity to grow pipeline, leaders prioritised conversion of existing demand (45%) and outbound prospecting capacity (37%). Far fewer cited paid media (18%), new geographies (19%), SEO (17%), or new campaigns/products (24%).

Implication: In a volatile market, pipeline is the leading indicator of execution readiness. And predictability depends not just on pipeline volume but on pipeline quality too. Realistic forecasting should not be compromised by wishful thinking.

Solution: Build shared accountability across marketing, sales, and customer success. Audit hand-offs, monitor conversion efficiency, and embed regular joint reviews.

Getting the basics right is often the decisive but overlooked lever for sustainable growth. Confidence comes from operational discipline; knowing your ideal customer profile (ICP) is current and precise, ensuring the funnel is actively managed from top to bottom, and

Where do you see the biggest opportunity to grow pipeline in the next 6–12 months?

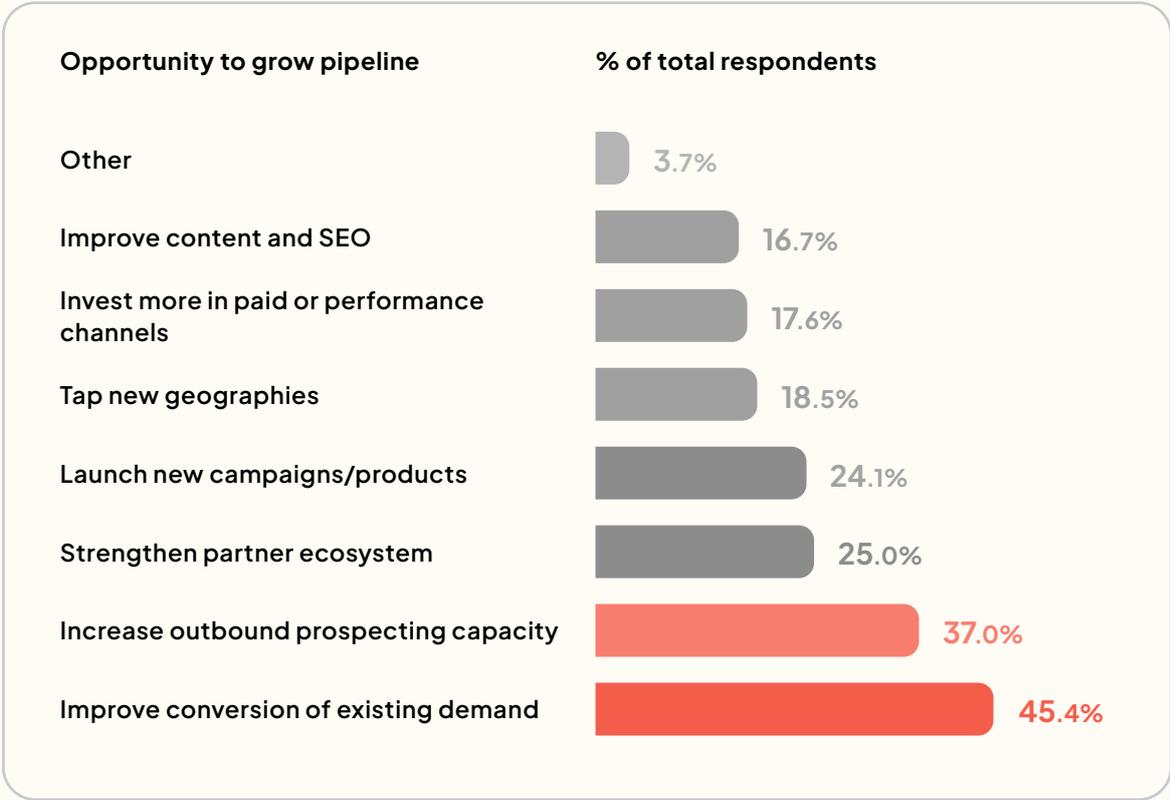


FIGURE 5. Biggest opportunities to grow pipeline in the next 6–12 months. Question asked to 108 leaders: Where do you see the biggest opportunity to grow pipeline in the next 6–12 months? (select up to 2) Distribution by total respondents.

that every lead is tracked, qualified, and converted through a consistent, shared framework. Investment in operations, data hygiene, and lead management infrastructure transforms intent into predictability, providing the visibility and rigour needed to turn ambition into reliable outcomes.

2. AMBITION TO BUDGET: WHEN TARGETS OUTRUN RESOURCES

Budget pressure has become a structural constraint. After years of compression, many GTM teams are being asked to do more with flat or shrinking budgets. More than half of leaders (57%) report no increase in investment, and 63% of those without budget alignment fall into the low-confidence group.

Confidence rises sharply when ambition and resourcing match: 20% of leaders with fully aligned budgets and headcount express high confidence. Where budgets lag, confidence collapses.

Budget distribution tells a deeper story. Most GTM spend is concentrated in top-of-funnel demand generation activities – events and sponsorships (50%), paid media (44%), and brand awareness (41%) dominate. Only 14% of spend reaches RevOps and 16% goes to customer marketing. This imbalance limits compounding growth.

Confidence in Growth Targets by Budget and Headcount Alignment

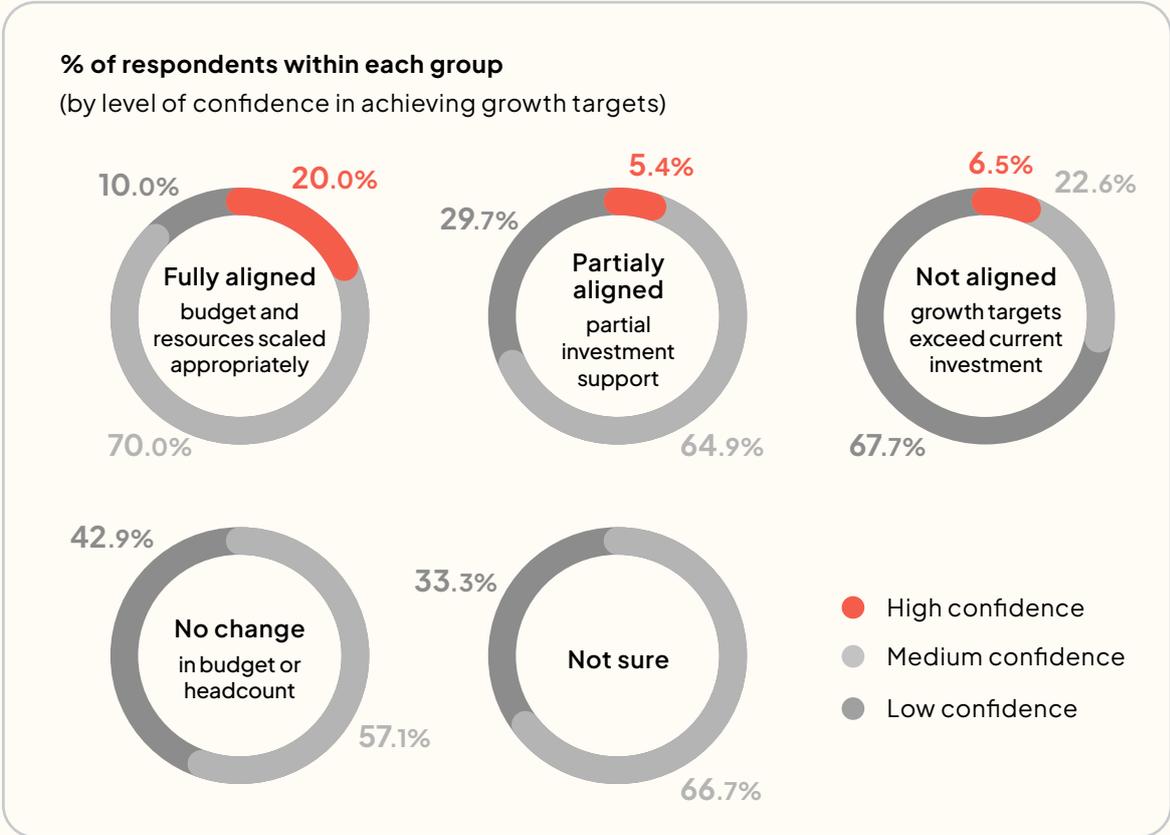


FIGURE 6. Confidence in growth targets by budget and headcount alignment. (To what extent are your growth targets supported by / aligned to changes in budget and headcount?)

Implication: Organisations are investing in visibility rather than velocity. Leads are generated, but poor enablement and hand-offs cause leakage, so while the brand looks busy, growth may not compound.

Solution: Treat budget allocation as a strategic lever, not a financial exercise. Shifting even a modest amount of spend toward enablement, customer marketing, or RevOps can create systemic leverage, improving conversion, retention, and recurring revenue. Equally, **strategic investment in brand:** building awareness, trust, and preference underpins every growth outcome.

The most confident organisations manage budgets as both **performance enablers and brand builders**, balancing short-term results with long-term equity. Effective budget management ensures every pound works twice: delivering immediate impact while compounding brand strength and organisational capability over time.

Budgets, ultimately, are the clearest signal of whether ambition is not only **credibly resourced but credibly believed in**.

How is your current GTM budget distributed across core investment areas?

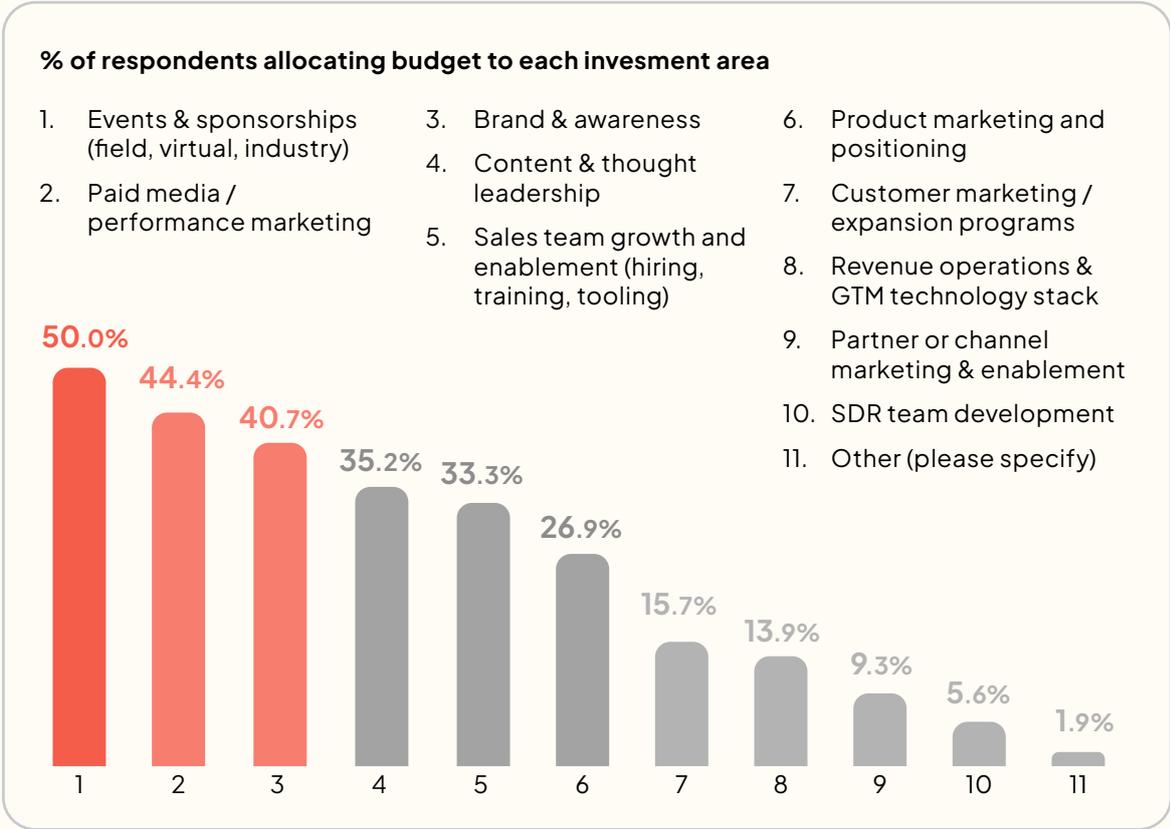


FIGURE 7. GTM budget distribution across investment areas. Question asked to 108 leaders: How is your current GTM (Go-to-Market) budget distributed across core investment areas? (select up to 3 areas where the majority of your GTM budget is currently focused) Distribution by total respondents.

3. AI ADOPTION TO EFFECTIVENESS: THE PARADOX OF EARLY MATURITY

AI has become both the most anticipated and the most misunderstood driver of GTM transformation. While 88% of leaders are exploring or using AI, only 12% describe its impact as transformational. Most label it “promising” (35%) or “experimental” (41%).

This disconnect reflects a maturity gap: adoption is high, but integration is low. Nearly eight in 10 teams use AI for content creation, but far fewer apply it to segmentation (25%), personalisation (25%), or account-based marketing (19%). As a result, AI delivers activity, not predictability.

Confidence in Growth Targets by AI Maturity in GTM

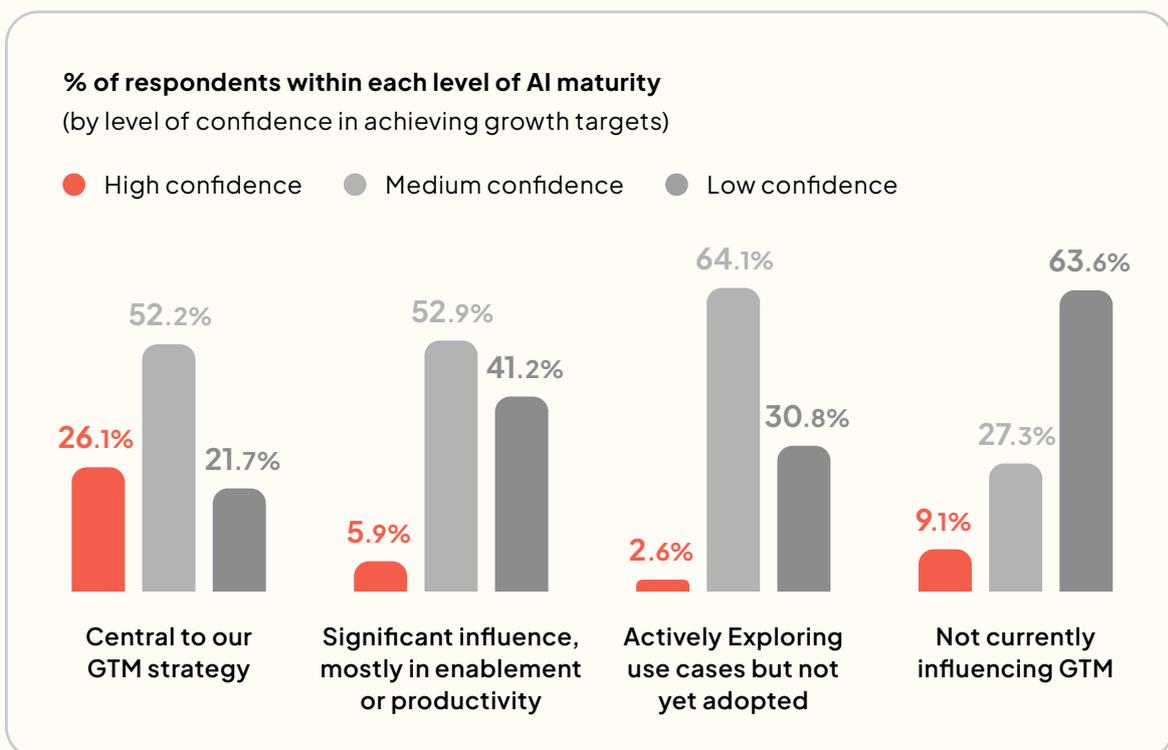


FIGURE 8. Confidence in growth targets by AI maturity in GTM (To what extent is AI shaping your go-to-market (GTM) strategy?)

Where AI is central to the GTM strategy, 26% of leaders report high confidence in meeting growth targets. Among those still experimenting, that figure is just 3%. The dividing line is not tools, but skills: 34% cite lack of internal expertise as the top barrier.

Implication: AI delivers impact only when the fundamentals are in place. When organisations have a clear Ideal Customer Profile (ICP), understand their Decision-Making Unit (DMU), and truly know customer needs, AI becomes an amplifier of precision and efficiency. Without this foundation, it risks generating activity rather than advantage.

The greatest returns come when human insight defines the strategy, the basics are in place, and AI enhances execution with scale, speed, and consistency.

Solution: Anchor AI strategy into core workflows; segmentation, forecasting, or lead-scoring and measure success in results, not activity levels. Build internal expertise before expanding scope – confidence follows capability, and so does innovation in finding ways to enhance business goals.

4. MARTECH TOOLS TO INTEGRATED STACK: TOOLS WITHOUT CONNECTION

The modern GTM technology stack promises integration, but in practice most tech stacks remain fragmented and siloed.

Only 11% of leaders describe their stack as best-in-class and integrated. Nearly half (44%) say they operate fragmented systems, and 38% rely on basic or manual stacks.

The impact on confidence is stark. Among those with integrated stacks, 46% report high confidence in delivering on growth targets. In fragmented or basic environments, that falls to just 5–7%.

Confidence in growth targets by state of GTM tech stack

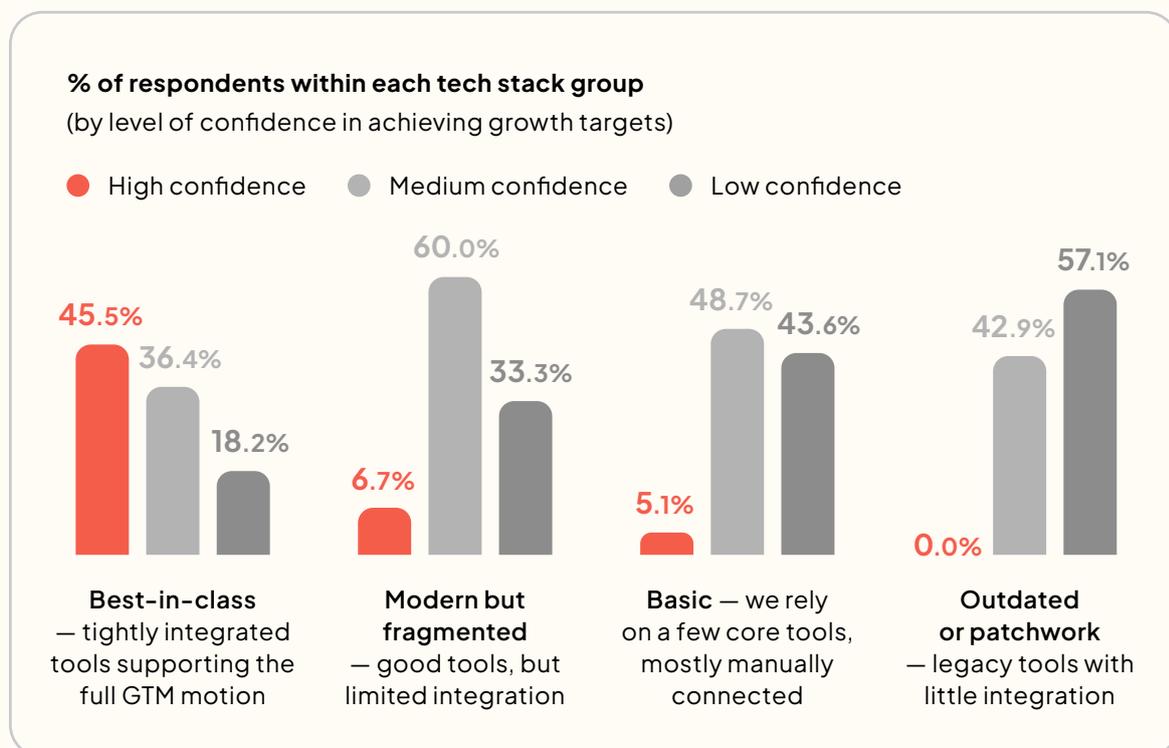


FIGURE 9. Confidence in growth targets by state of GTM tech stack (How would you describe the state of your current GTM tech stack?)

Despite this, most organisations are in maintenance mode, rather than building and consolidating their stacks. More than half (53%) are merely maintaining existing systems, replacing tools ad hoc rather than setting a martech strategy and pursuing deeper integration.

This leaves many leaders with modern tools that operate in silos rather than as a coherent system. The difference between technology as a driver or a drag lies not in the number of tools, but in how well they work together.

Implication: As fragmentation slows execution, clouds forecasts, and fractures the customer journey, a failure to build integration will erode confidence instead of enabling it. When systems don't talk to each other, insight is delayed, decision-making becomes reactive, and teams lose visibility of what's really driving growth. Confidence thrives on clarity, and that clarity depends on connected data, shared visibility, and consistent workflows across marketing, sales, and customer success.

Solution: Consolidate around a single system of record, unify data models, and rebuild processes around workflow continuity. Integration is not just a technology project but a structural enabler of growth readiness. A cohesive GTM ecosystem where data flows freely, reporting is real-time, and teams operate from a single source of truth accelerates performance and sharpens decision-making. Integration transforms tools from isolated utilities into an intelligent operating system for predictable growth.

5. GOALS TO ALIGNMENT AND GROWTH: TURNING COLLABORATION INTO CONFIDENCE

Cross-functional alignment remains inconsistent in many organisations. Yet where GTM priorities are strongly supported by finance, product, and operations, 26% of leaders report high confidence, while in businesses where support is minimal, none do.

Similarly, while most leaders report some collaboration between sales and marketing, only **27%** of leaders describe the teams as fully unified. Among these, **28%** are highly confident in meeting 2026 targets. In siloed organisations, confidence drops to zero.

Alignment is a structural issue — the integration of shared goals, unified data, and coordinated engagement across the full buyer journey. Review cadence reinforces this: teams meeting weekly or bi-weekly are markedly more confident than those meeting quarterly or irregularly.

Implication: Misalignment is a commercial cost, not a cultural issue. It fragments strategy, slows decision-making, and erodes pipeline quality. And for investors, fragmented alignment is a due diligence red flag, directly undermining forecast reliability.

Solution: Institutionalise alignment through shared metrics, standard definitions, and joint ownership of the pipeline. Treat marketing as a growth engine, not a cost centre. Confidence grows when accountability is collective.

Confidence in growth targets by sales-marketing relationship

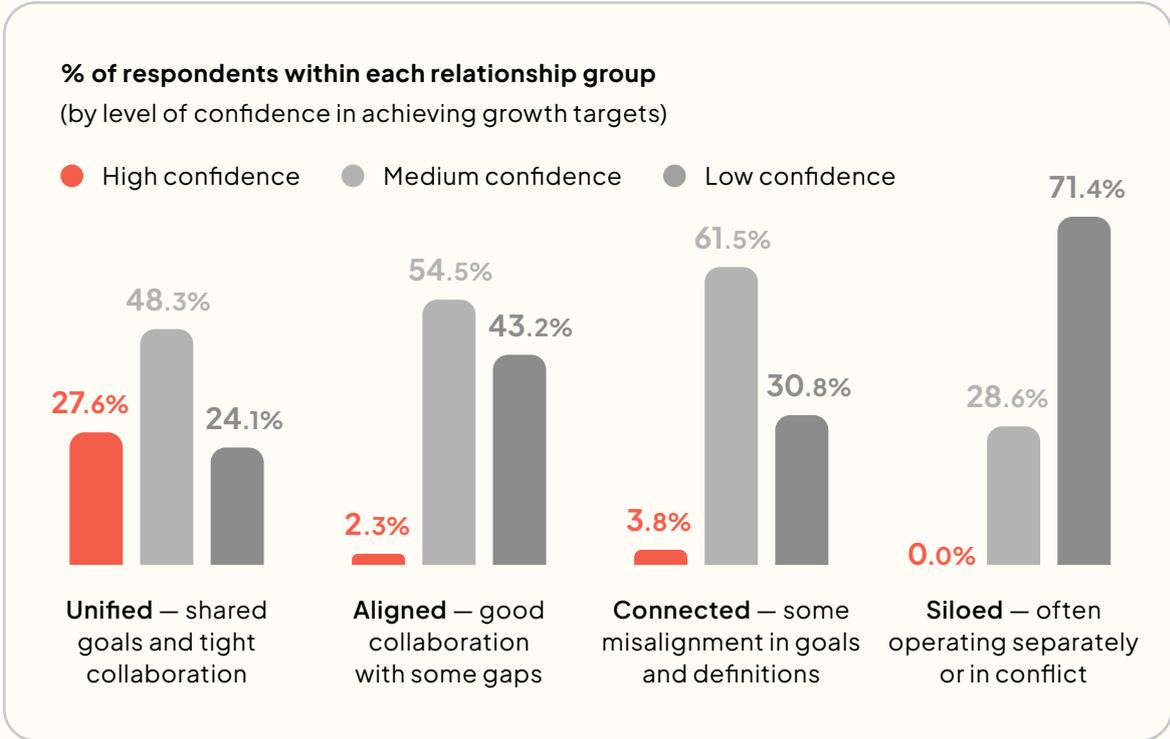


FIGURE 10. Confidence in growth targets by sales-marketing relationship (How would you describe the relationship between sales and marketing in your organization?)

Strategic Recommendations

Closing the confidence gap requires more than optimism. It demands deliberate investment in the execution fundamentals that underpin predictability: pipeline discipline, budget alignment, AI integration, system maturity, and cross-functional support.

Confidence begins with clarity. Organisations build conviction when they know **where to play** aligning strategy to the right markets, segments, and opportunities. Confidence grows from data, not instinct: understanding customer needs, validating your Ideal Customer Profile (ICP), and focusing effort where competitive advantage is strongest.

When leadership teams connect market insight, customer intelligence, and operational execution, growth becomes not just ambitious but achievable translating focus into foresight, and foresight into confidence.

The following roadmap outlines actions across three horizons.

NEXT 90 DAYS: DIAGNOSIS AND IMMEDIATE IMPACT

- **Clarify where to play:** use data and customer insight to identify the most valuable segments and accounts building confidence through focus and precision.
- **Audit pipeline exits and hand-offs:** review how opportunities move between marketing, sales, and customer success. Identify where leakage undermines conversion.
- **Reconcile targets to budgets:** ensure current revenue goals match headcount and investment reality. Adjust quarterly expectations where ambition exceeds resourcing.
- **Assess AI readiness:** map current pilots, evaluate skills, and define one workflow where AI can make a measurable difference (e.g. qualification, segmentation, or cycle-time reduction).
- **Strengthen operating rhythm:** establish weekly or bi-weekly pipeline reviews across sales, marketing, and operations to build shared accountability.

6-12 MONTHS: SYSTEMIC CHANGE FOR SUSTAINABLE FOUNDATIONS

- **Refine ICP and prioritisation:** continually test and validate your Ideal Customer Profile to ensure resources, messaging, and pipeline activity align to the right markets where your business can win most decisively.
- **Rebalance spend into enablement:** move 10-20% of GTM budgets from capture (events, media) into conversion levers like enablement, customer marketing, and RevOps.

- **Consolidate the tech stack:** reduce fragmentation by moving towards a single system of record and shared data model.
- **Operationalise alignment:** define shared KPIs for marketing and sales, standardise definitions (lead, opportunity), and formalise hand-offs.
- **Build AI capability:** scale AI from pilots into multiple workflows, supported by training and change management.

12+ MONTHS: LONG-TERM, CONFIDENCE-DRIVEN GROWTH

- **Institutionalise AI-powered GTM governance:** embed AI into forecasting, campaign planning, and customer engagement, with clear ownership structures.
- **Invest in best-in-class integration:** move towards a fully integrated GTM stack, underpinned by RevOps and unified customer data.
- **Scale customer-led and partner-led growth:** build systematic programmes for expansion within existing accounts and through partner ecosystems.
- **Embed confidence as a leadership metric:** track and report confidence in growth delivery alongside pipeline and revenue to strengthen predictability at board level.

TAKEAWAYS

Confidence is one of the most powerful indicators of an organisation's growth readiness.

But ambition alone does not indicate or drive confidence.

In an environment defined by volatility and investor scrutiny, confidence is a visible measure of growth readiness, signalling whether the fundamentals of execution – resourcing, alignment, systems, and capability – are in place.

If these gaps remain unaddressed, confidence will continue to lag behind ambition, and forecasts will remain fragile. But where leaders act decisively to close them – strengthening pipeline predictability, aligning budgets, embedding AI, integrating systems, and institutionalising alignment converts ambition into conviction.

That is what will separate the firms that meet their growth goals from those still chasing them in 2026 – and beyond.

About the GTM Confidence Index FY26

The GTM Confidence Index captures insights from 108 senior B2B commercial leaders across North America, Europe, and global markets. Respondents are CMOs, CROs, VPs Sales/Marketing and senior GTM leads, from companies spanning under 250 to over 1,000 employees, in both tech/SaaS and non-tech sectors, with revenue from under £10M to £/\$5B+.

Conducted in August–September 2025, the Index benchmarks confidence levels, identifies execution gaps, and provides a roadmap for closing them ahead of 2026.

Benchmarks for comparison

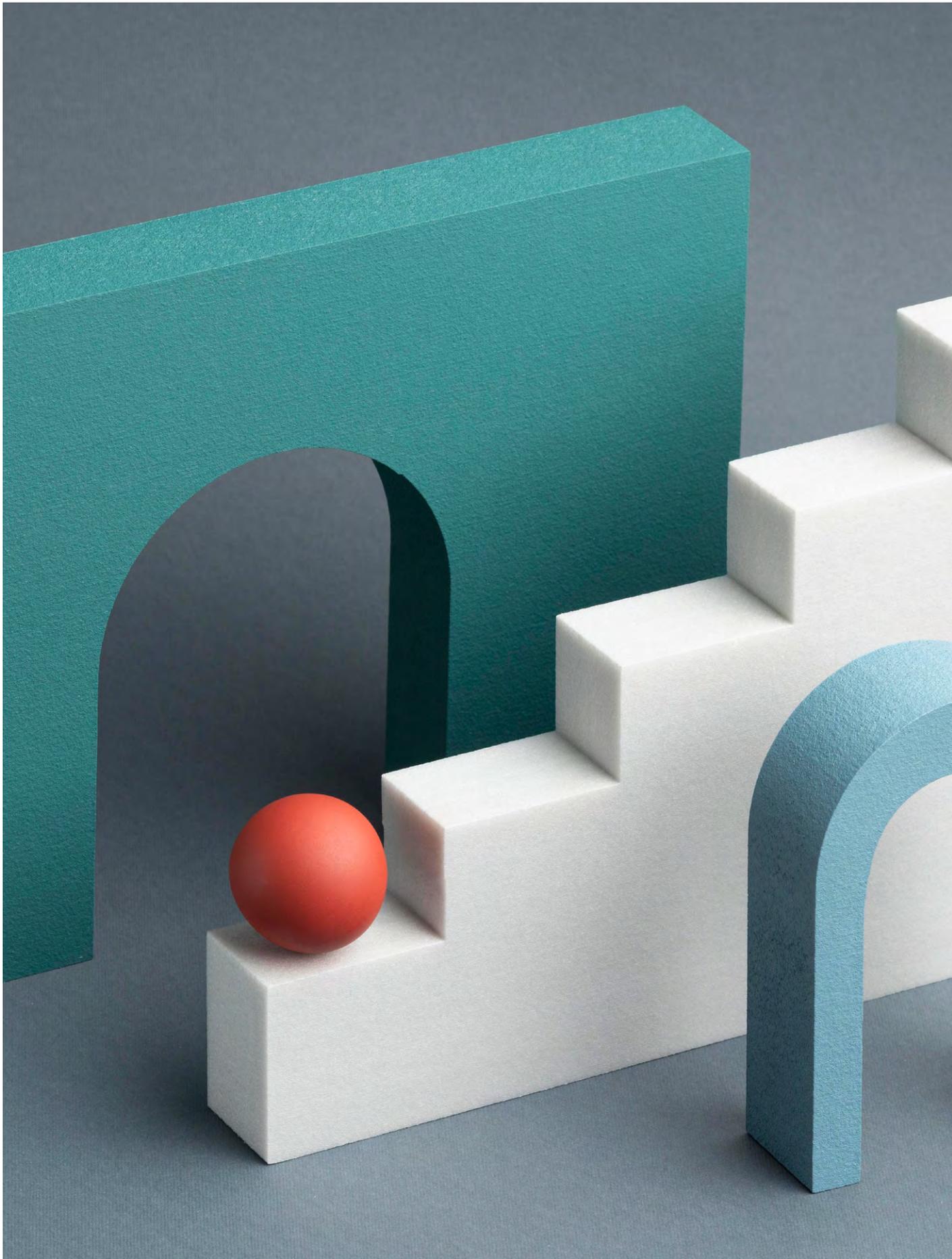
- Confidence: 9% very confident; 54% somewhat; 36% low.
- Budgets: 10% up significantly; 32% up moderately; 33% flat; 24% down.
- AI maturity: 21% central; 32% significant; 36% exploring; 10% not influencing.
- Stack maturity: 11% integrated; 44% fragmented; 38% basic; 7% outdated.
- Alignment: 27% unified; 42% aligned with gaps; 23% connected; 6% siloed.

Methodology & about this research

- Survey of 108 qualified B2B GTM leaders conducted August–September 2025
- Roles: CMOs, CROs, VPs Sales/Marketing, senior GTM leads
- Company sizes: from <250 employees to enterprise (>1,000); revenue from under £10M to £/\$5B+
- Regions: North America, Europe, global/multi-region
- Industries: Tech/SaaS and non-tech

About Magnus Consulting

Magnus is a B2B growth consultancy that gives leadership teams clarity on where to play and confidence in how to win powered by our AI customer-intelligence platform, Magnitude. We're a certified B Corp and recognised by the Financial Times among the UK's leading management consulting firms for Marketing, Brand & Pricing.



MAGNUS CONSULTING

WHEN PRIORITIES SHIFT, MOMENTUM MATTERS.

Magnus Consulting is a B2B growth consultancy supporting ambitious businesses align marketing and sales on where to focus and how to win – embedding the strategy, behaviours, and systems for teams to succeed.

Find out more: <https://magnusconsulting.co.uk>
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