EverReady

2026 REPORT

BUILT ON THE REVENUE DATA RELIABILITY INDEX™

The CRM Revenue Data Report

How data reliability impacts forecast accuracy, sales execution, and AI readiness.

41%

of revenue-critical activity never reaches the CRM

27%

of active opportunities lack a defined next step

90%

forecast accuracy where governance is enforced

EXECUTIVE SUMMARY

Reliable CRM data is a revenue performance driver

How data reliability impacts forecast accuracy, sales execution, and AI readiness.

CRM systems are designed to centralize revenue data. Yet across revenue organizations, CRM data reliability remains inconsistent, under-measured, and structurally fragile.

According to Gartner (2021), poor data quality costs organizations an average of $12.9 million per year. For revenue teams, this translates into distorted forecasts, missed execution, and compromised AI initiatives.

This report analyzes CRM data reliability patterns across revenue teams and introduces the **Revenue Data Reliability Index™ (RDRI)** as a benchmark framework.

THE HEADLINE NUMBERS

27% of active opportunities lack a defined next step

22% of deals contain outdated or unrealistic close dates

18% of accounts have inactive or misaligned owners

41% of revenue-critical activity never reaches the CRM

31% of revenue leaders admit low confidence in forecast accuracy

Organizations with structured CRM governance demonstrate up to 90% forecast accuracy.
CRM reliability is not a hygiene issue. It is a revenue performance driver.

INTRODUCTION

CRM as revenue infrastructure

CRM platforms are no longer simple reporting systems. They are the central nervous system of revenue operations. However, reliability degradation is predictable. CRM data decays due to employee turnover, role changes, manual input inconsistencies, and a lack of governance enforcement. Without structured oversight, CRM reliability declines by 20–35% annually.

WHAT THE CRM POWERS

- Pipeline forecasting
- Sales performance tracking
- AI-driven insights and agents
- Board reporting

CRM
DATA HUB

WHAT ERODES THE DATA

- × Employee turnover
- × Role changes
- × Manual input errors
- × Governance gaps

Without governance: −20% to −35% reliability per year

The reliability decay curve

CRM data does not degrade linearly. It compounds. Industry estimates place B2B contact decay at 25–30% per year through job changes, promotions, and departures alone. Opportunity data decays even faster: every quarter without enforced field discipline adds stage inflation, pushed close dates, and orphaned accounts.

The implication: reliability is not a one-time cleanup project. It is a maintenance function. Like uptime for infrastructure, it must be continuously monitored and enforced.

METHODOLOGY

How the analysis was built

The CRM Revenue Data Report analyzes anonymized CRM environments across B2B revenue teams operating primarily on Salesforce, spanning SMB, mid-market, and enterprise organizations across Europe and North America. Industries represented include software, industrial distribution, manufacturing, professional services, and financial services.

120+
CRM environments analyzed

2.6M+
opportunity records

7M+
accounts & contacts

Period: January 2024 – December 2025 **Segments:** SMB, mid-market, enterprise

Five revenue-critical fields

Reliability is measured using the Revenue Data Reliability Index™ (RDRI) across the fields that most directly shape forecast integrity.

- Stage integrity
- Close date discipline
- Next-step definition
- Ownership alignment
- Activity logging

RDRI™ score <60% volatile 60–80% moderate >80% predictable

THE FRAMEWORK

The Revenue Data Reliability Index™

The RDRI measures CRM trustworthiness across five dimensions. Each is scored and weighted to produce a reliability percentage between 0% and 100%.

DIMENSION	WHAT IT MEASURES	EXAMPLE FAILURE SIGNAL
Completeness	Are revenue-critical fields populated?	Empty next-step fields, missing contacts on open deals
Accuracy	Does the data reflect reality?	Stages that don't match actual deal progress
Freshness	Is the data current?	No activity logged in 30+ days on "active" deals
Ownership clarity	Is accountability unambiguous?	Accounts assigned to departed employees
Execution consistency	Is the process followed uniformly?	Close dates pushed 3+ times, skipped stages

Reliability benchmarks

Below 60%

High volatility

Forecasts unusable beyond 30 days; AI initiatives premature.

60–80%

Moderate stability

Directional forecasting possible; execution gaps persist.

Above 80%

High predictability

90%+ forecast accuracy achievable; AI-ready foundation.

✓ **Organizations above 80% consistently demonstrate stronger revenue predictability.**

KEY FINDINGS

Five reliability gaps that cost revenue

FINDING 1
27%

Missing next steps stall revenue

27% of active opportunities do not include a defined next step, reducing execution accountability and driving pipeline stagnation and artificial stage inflation. Revenue reliability requires execution clarity.

FINDING 2
22%

Close date distortion drives forecast inflation

22% of opportunities contain outdated or frequently postponed close dates, inflating revenue projections and creating forecast volatility and executive-level misalignment. Stage integrity and close date discipline are foundational to forecast credibility.

FINDING 3
18%

Ownership gaps create revenue leakage

18% of accounts showed inactive owner assignment, duplicate ownership, or undefined accountability. Without clear ownership, execution reliability declines.

FINDING 4
41%

The invisible pipeline: unlogged activity

41% of revenue-critical interactions never reach the CRM when logging depends on manual entry. Deal reviews rely on rep memory, coaching runs on incomplete signals, AI models train on a fraction of activity, and relationship intelligence walks out with every departure. The most expensive CRM data is the data that was never entered.

FINDING 5
80%

Reliability predicts forecast accuracy

Organizations with RDRI scores above 80% demonstrate 90%+ forecast accuracy, lower pipeline volatility, and stronger board-level confidence. CRM reliability directly impacts revenue predictability.

BENCHMARKS

Reliability by segment

Reliability improves with organizational maturity, but no segment reaches the 80% predictability threshold on average.

SEGMENT	AVG. RDRI	MOST COMMON FAILURE
SMB (< 200 employees)	58%	Missing next steps and inconsistent activity logging
Mid-market (200–2,000)	64%	Ownership gaps following team reorganizations
Enterprise (2,000+)	71%	Close date pushes and stage inflation at quarter-end

The pattern is consistent: process alone does not close the gap. Only automation removes manual entry as a structural failure point.

AI READINESS

CRM reliability and AI readiness

AI systems depend on structured historical CRM data. When records include stage inflation, close date pushes, undefined next steps, or missing activity history, AI models amplify those distortions. An AI agent reasoning over incomplete data doesn't produce incomplete answers. It produces confident wrong answers. With agentic AI moving from pilot to production, CRM data is the operating fuel for autonomous systems.

✕ **The wrong sequence**

Deploy AI → hope the data holds up

✓ **The right sequence**

Measure reliability → fix the foundation → deploy AI on trustworthy data

THE BUSINESS CASE

The cost of CRM unreliability

Unreliability creates overestimated pipeline, missed renewals, reduced productivity, coaching blind spots, and strategic decision fragility. A simple cost model — team of 50 reps, $10M quarterly pipeline:

$2.2M
of pipeline your forecast can't trust — 22% of deals with distorted close dates.

27%
of deals without next steps age silently instead of advancing.

~6 FTEs
of selling capacity lost annually — ~5h per rep per week on manual CRM updates.

The cost is not only financial. It is cultural. When leaders stop trusting the CRM, they stop using it, which accelerates the decay.

The CRM reliability maturity model

LEVEL 1
Reactive
Annual cleanses, no measurement, blame culture.

LEVEL 2
Monitored
Dashboards exist, reliability measured but not enforced.

LEVEL 3
Governed
Validation rules, defined ownership, monthly audits.

LEVEL 4
Automated
Capture is automatic, reliability is a tracked KPI, AI-ready.

High-performing teams treat CRM reliability as infrastructure, not administrative hygiene — mandatory fields, enforced next-step discipline, automated validation and capture, monthly audits, and executive ownership of governance.

ACTION PLAN

Recommendations for revenue leaders

1. **Define your revenue-critical fields**
   Not all fields matter. Govern the ones that directly impact forecast accuracy.

2. **Measure reliability monthly**
   Track RDRI or a similar structured score. What isn't measured degrades silently.

3. **Align RevOps and sales leadership**
   Rules without executive sponsorship become suggestions.

4. **Automate what never should be manual**
   Remove manual entry for activities, contacts, and engagement data. Humans forget; systems don't.

5. **Clean historical distortion patterns**
   Address stage inflation and close-date push trends before they poison AI training data.

6. **Audit AI readiness**
   Assess whether CRM data integrity supports predictive modeling before deploying agents on top of it.

The first 90 days

DAYS 1–30

Baseline

Baseline your RDRI. Identify your three worst-performing dimensions.

DAYS 31–60

Deploy

Deploy validation rules and automated capture on revenue-critical fields.

DAYS 61–90

Review

Run your first monthly reliability review with sales leadership.

Target: +10 RDRI points per quarter.

CONCLUSION

CRM reliability is the missing KPI

Revenue leaders track pipeline coverage and win rate. But without reliable data infrastructure, those metrics lose integrity. Reliable CRM data drives forecast predictability, sales execution discipline, AI effectiveness, and strategic confidence. Revenue performance begins with trust. And trust begins with reliable data.

About EverReady

EverReady is the Salesforce-native Revenue Intelligence solution. It automatically captures the sales activity your teams never log (emails, meetings, contacts) and turns it into reliable data, directly inside your CRM. Its AI agents analyze every deal and pipeline to surface the risks and opportunities declarative data can't show. The result: credible forecasts, with no new tool to adopt and no manual entry.

SOURCES & NOTES

- Gartner, 2021: poor data quality costs organizations an average of $12.9M per year.
- B2B contact data decay of 25–30% per year: industry estimates (e.g. ZoomInfo, HubSpot).
- Manual CRM entry of ~5 hours per rep per week: published sales productivity studies (e.g. Salesforce State of Sales).
- All RDRI findings (27% / 22% / 18% / 41% and segment benchmarks): EverReady proprietary analysis, Jan 2024 – Dec 2025, 120+ CRM environments.

See where your team stands

We'll run a free RDRI assessment on your Salesforce data and show you exactly which gaps to close first.

Book my RDRI assessment →

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