

PEO

Revenue Enablement in the AI Era

PEO organizations face a sales environment unlike most B2B categories: **selling a product buyers often don't fully understand, competing against brokers with lower-friction motions, and navigating multi-stakeholder deals where the ROI case has to land with a CFO, an HR leader, and a business owner simultaneously.** This spotlight highlights what PEO sales, marketing, and RevOps leaders are saying about their biggest challenges, how they're using AI, and where the gaps are widest.*

TOP SALES PROCESS CHALLENGES

60%

say demonstrating ROI/value to decision-makers is a top challenge

50%

cite differentiating from competitors or brokers

50%

cite navigating long sales cycles or multiple stakeholders

30%

say educating prospects about what a PEO is

Educating prospects on what a PEO is (often assumed to be the primary hurdle) ranked fourth. The harder problems are further downstream: **proving value and standing apart once a conversation is already happening.**

TOP SALES PROCESS CHALLENGES



Most common

Automating content and follow-up emails



Least common

Creating personalized proposals or ROI models

The gap between those two data points is worth focus: **PEO teams are using AI for efficiency tasks while their biggest sales challenge (demonstrating ROI) remains almost entirely unaddressed by AI tooling.** The investment is going toward the top of the funnel. The problem lives in the middle.

MOST EFFECTIVE ENABLEMENT CONTENT



Personalized Pitch Decks

Ranked #1 alongside thought leadership as the most effective content for winning new PEO clients



HR Thought Leadership

Compliance and HR expertise content tied for the top spot: buyers want advisors, not just vendors



Industry Case Studies

Peer proof ranked third. Social validation matters in a category where ROI can be hard to visualize.

The content that works is consultative and credibility-building. Yet ROI calculators (the tool most directly built to address the #1 sales challenge) ranked last. **PEO sellers aren't failing to work hard; they may be working with the wrong tools.**

SALES AND MARKETING ALIGNMENT

80%

of PEO respondents say sales and marketing are only partially aligned on ICP definitions and messaging

Only 1 in 10 said they are fully aligned, lower than any other industry segment in the survey

PEO buyers span multiple decision-makers (HR leaders, CFOs, and business owners) each requiring a different value narrative.

Without shared ICP definitions, sales reps and marketing teams pull in different directions on who they're targeting and what message will land. In long-cycle, multi-stakeholder deals, that inconsistency compounds with every touchpoint.

AI MATURITY AND ADOPTION BARRIERS

60%

are still in early exploration. Only 1 in 10 said AI is deeply integrated into daily workflows.

90%

cite lack of training and internal expertise as the #1 barrier to AI adoption

PEO respondents are among the more cautious AI adopters across our research. While the majority report slight efficiency gains, 40% saw no noticeable change, a more skeptical result than the overall population. **And zero PEO respondents said they are very confident in the accuracy of their CRM or AI data.**

A NOTABLE INFRASTRUCTURE GAP



Only 2 in 10

PEO respondents report having a CRM in their enablement stack
Marketing automation (9 in 10) and conversation intelligence (5 in 10) are far more common

PEO sales motions (long cycles, multi-stakeholder deals, retention, and upsell) depend on visibility into pipeline history, contact relationships, and account activity. Without a CRM, that visibility is limited, and AI use cases like lead scoring, renewal forecasting, and account-based targeting lack the foundation they need to deliver value. It also makes the data confidence finding above less surprising: **if CRM data is sparse or absent, trust in AI-generated insights will naturally be low.**

WHAT THIS MEANS FOR PEO LEADERS

- **Redirect your AI investment toward the middle of the funnel.** Most AI effort in PEO is going toward top-of-funnel efficiency: automating emails, finding prospects. The harder problem is further downstream, and that's where your tools should be pointed.
- **Build the ROI case before you need it.** Your buyers want to see what they're getting before they sign, yet ROI calculators ranked last as effective enablement content. Developing strong, customizable cost-comparison and value tools directly addresses what your reps say is their hardest problem.
- **Get sales and marketing aligned on who you're selling to.** Eight in ten PEO respondents acknowledged their teams are only partially aligned on ICP definitions, a costly gap in a category with multiple distinct buyer personas. Start with a shared, written ICP definition that both teams own.
- **Treat the CRM gap as an infrastructure priority, not a future initiative.** Without a CRM, long-cycle, multi-stakeholder deals are being managed largely on memory and manual tracking. That limits everything downstream: AI use cases, attribution, account visibility, and renewal forecasting.
- **Invest in training before adding more tools.** Nine in ten PEO respondents flagged lack of training as their top AI barrier, not cost, not skepticism. More tools without the internal capability to use them well will produce more of the same modest results.

* About this data: This spotlight draws on responses from a subset of PEO industry participants in LeadG2's 2026 Revenue Enablement in the AI Era survey (n=154 total). Results are directional (not statistically significant) and are best understood as early signals and conversation starters rather than definitive benchmarks.