FOURTH EDITION

STATE of SALES

Insights from nearly 6,000 sales professionals on what drives business resilience and growth

salesforce
For the fourth edition of our “State of Sales” report, Salesforce Research surveyed nearly 6,000 sales professionals worldwide to discover:

- How inside and outside reps are adjusting to new expectations from leaders and customers
- The evolving responsibilities and elevated importance of sales operations
- New growth strategies and tactics that sales leaders are adopting amid a global crisis

**Methodology**

Data in this report is from a double-blind survey conducted from May 13, 2020, through June 30, 2020, that generated 5,951 responses from full-time sales professionals, including sales operations, sales representatives, and sales leadership. Respondents include sellers from B2B and B2B2C companies across North America, Asia Pacific, Europe, the Middle East, and Africa. All respondents are third-party panelists (not limited to Salesforce customers).

Due to rounding, not all percentage totals in this report equal 100%. All comparison calculations are made from total numbers (not rounded numbers). See page 40 for more details.

Salesforce Research provides data-driven insights to help businesses transform how they drive customer success. Browse all reports at salesforce.com/research.
What You’ll Find in This Report

Terms Used in This Research
In this research, we refer to several sample respondent groups, defined as follows:

- **Sales reps**: Quota-carrying sales representatives
- **Sales operations**: Includes sales enablement, revenue ops, and deal desk
- **Sales leaders**: Sales executives and managers
- **Sales professionals**: All salespeople, inclusive of the groups above
- **Sales organizations**: Sales professionals answering on behalf of their teams
What You’ll Find in This Report

Distribution of Sales Performance Levels
Throughout this report, we classify respondents across three tiers of sales organization performance.

9% Underperformers
Slightly or not confident in their ability to close deals

24% High performers
Completely confident in their ability to close deals

68% Moderate performers
All other sales organizations
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Executive Summary

The art and science of selling have never been static, but a global pandemic has upped the ante for transformation.

Reps are leaning into their roles as strategic relationship builders, adapting to buyer needs with empathy and insights. Meanwhile, sales operations teams are growing increasingly strategic, bolstering leaders as they envision a new future amidst ambiguity.

This research covers how sales teams are adapting to recover and grow during a pivotal time.

01 Reps Retool Tactics for a New Selling Landscape (See page 07)
Sellers are adapting quickly to changes both inside their companies and outside from customers. High-performing reps recognize the importance of empathy, trust, and insights in building customer relationships that outlast the current crises. 

The vast majority of reps – 79% – say they’ve had to adapt quickly to new ways of selling.

02 Sales Operations Gets a Bigger Seat at the Table (See page 12)
The back office is stepping into the spotlight as the selling landscape shifts. Teams are working quickly to adapt their people and processes to new challenges and opportunities, elevating the strategic importance of sales operations. 

Eighty-five percent of sales professionals agree that sales ops is becoming increasingly strategic.

03 Leaders Pivot for Recovery and Growth (See page 20)
Sales leaders are steering their ships toward recovery and growth in a changed world. Despite a future riddled with ambiguity, leaders are quickly adjusting strategies and implementing needed changes. Seventy-seven percent of sales leaders say their digital transformation has accelerated since 2019.
Reps Retool Tactics for a New Selling Landscape

Since the advent of business, sales strategies have evolved in response to customers’ changing needs. COVID-19 has shaken up customers’ circumstances with unprecedented scale and speed. As a result, 79% of sales reps say they’ve had to quickly adapt to new ways of selling.

Building trust has always been important. However, it’s now even more crucial, as customers and prospects with scarcer resources and foggier outlooks question long-held assumptions.

Meanwhile, reps are contending with a flood of changes themselves. Between new responsibilities, new metrics, and new ways of selling, everything is on the table.

58% of sales reps expect their role to change permanently.

Adaptation Is Key as Customers Face Unprecedented Challenges

Reps Who Report the Following Impacts of Current Economic Conditions

- Increased importance of long-term customer relationships: 86%
- Increased importance of building trust before a sale: 83%
- Increased importance of building trust after a sale: 80%
- Changing sales success metrics: 72%
- New job responsibilities: 64%
Selling during public health and economic crises isn't easy for anyone, but it’s particularly challenging for outside reps. Traditionally reliant on in-person meetings, outside reps now need to build trust through a browser window. Many are struggling with the transition, and feel that expectations from leadership don’t mesh with their new reality.

Inside reps’ jobs haven’t been shaken up in the same way. These reps are more likely to feel their customer relationships are deepening and, ultimately, have more faith in their ability to close deals.
Recognizing there’s no one-size-fits-all approach to selling, many sales organizations allow reps the autonomy to work in the most agile and effective manner.

However, this doesn’t mean organizations are forgoing all defined protocols. Staying aligned on opportunities is no longer a matter of walking over to a colleague’s desk, and many sales organizations are tightening the reins on documentation.

With the line between outside and inside sales blurring, this change is especially noticeable for those who used to work in the field.

73% of sales teams are increasingly monitoring outside reps’ activities.*

* Base: Outside reps, sales operations, and leaders at companies with outside reps.
Reps have a long list of job responsibilities, in addition to simply maintaining customer relationships. In 2018, duties like data entry and paperwork filled so many hours that reps only spent one-third of their time actually selling.*

Fortunately, as technologies like artificial intelligence (AI) mature, reps are finding some relief in the form of automation. High-performing teams lead the way, enabling reps to spend more time learning about and connecting with customers.


### Top Performers Automate Repetitive Tasks

<table>
<thead>
<tr>
<th>Task</th>
<th>High Performers</th>
<th>Moderate Performers</th>
<th>Underperformers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logging sales data and customer notes</td>
<td>69%</td>
<td>59%</td>
<td>46%</td>
</tr>
<tr>
<td>Managing administrative tasks</td>
<td>66%</td>
<td>55%</td>
<td>41%</td>
</tr>
<tr>
<td>Generating quotes/proposals</td>
<td>65%</td>
<td>52%</td>
<td>37%</td>
</tr>
<tr>
<td>Prioritizing leads/opportunities</td>
<td>64%</td>
<td>51%</td>
<td>30%</td>
</tr>
<tr>
<td>Determining what action to take on accounts</td>
<td>63%</td>
<td>46%</td>
<td>27%</td>
</tr>
</tbody>
</table>

** Responses of “completely automated” and “mostly automated.”
Reps voraciously devour information from many sources so they can understand and advise customers – powering a process called insight selling.

88% of reps say current economic conditions make it important to anticipate customers’ needs.

Reps are generally aligned on how frequently to monitor publicly available information sources – such as macro developments in national and international news, and micro trends in trade magazines, industry podcasts, and more.

However, an interesting split emerges when it comes to the kinds of customer-specific insights often revealed in sales conversations and documented privately, like staffing changes. Across the board, high-performing organizations track these insights much more closely, using them to flesh out a holistic picture of who customers are and what they need.

### Spotlight: The Insights That Drive Sales

### Top Performers Closely Track Deeper Customer Insights

<table>
<thead>
<tr>
<th>News</th>
<th>High performers vs. Underperformers</th>
</tr>
</thead>
<tbody>
<tr>
<td>National news</td>
<td>1.0x more likely</td>
</tr>
<tr>
<td>Local news</td>
<td>1.2x more likely</td>
</tr>
<tr>
<td>Industry news</td>
<td>1.1x more likely</td>
</tr>
<tr>
<td>International news</td>
<td>1.2x more likely</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Insights</th>
<th>High performers vs. Underperformers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer communication history</td>
<td>1.5x more likely</td>
</tr>
<tr>
<td>Customer purchase history</td>
<td>2.4x more likely</td>
</tr>
<tr>
<td>Competitor activity</td>
<td>2.9x more likely</td>
</tr>
<tr>
<td>Customer staffing changes</td>
<td>4.5x more likely</td>
</tr>
</tbody>
</table>

See more detail on monitoring frequency on page 27.
Sales Operations Gets a Bigger Seat at the Table

Sales Operations Becomes Increasingly Strategic

**Scope of Sales Operations Teams’ Work**

<table>
<thead>
<tr>
<th>Limited to sales strategy execution</th>
<th>Includes sales strategy definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>44%</td>
<td>56%</td>
</tr>
</tbody>
</table>

75% of sales ops professionals say they have new responsibilities at work.

64% of sales ops professionals expect their roles to change permanently.

85% of sales professionals agree that sales ops is increasingly strategic.

The operations role has been the unsung hero of sales for quite some time, but colleagues now acknowledge the seat at the table it has deserved all along.

During a time of upheaval in which norms don’t apply, operational efficiency and data-driven decision-making take on special importance.

Many companies are taking advantage of sales ops’ skill set, with these employees not just supporting sales strategy but also helping define it. The general sentiment is that this is not just a temporary, opportune shift.

Base: Company has sales operations.
Sales Operations Gets a Bigger Seat at the Table

The Sales Operations Job Description Is Expanding

Change in Sales Ops Involvement Since 2019

<table>
<thead>
<tr>
<th>Activity</th>
<th>Increased involvement</th>
<th>No change</th>
<th>Decreased involvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales strategy planning</td>
<td>56%</td>
<td>38%</td>
<td>6%</td>
</tr>
<tr>
<td>Sales performance analysis</td>
<td>55%</td>
<td>38%</td>
<td>7%</td>
</tr>
<tr>
<td>Sales strategy coordination</td>
<td>55%</td>
<td>39%</td>
<td>7%</td>
</tr>
<tr>
<td>Sales technology management</td>
<td>52%</td>
<td>42%</td>
<td>7%</td>
</tr>
<tr>
<td>Sales training management</td>
<td>49%</td>
<td>41%</td>
<td>10%</td>
</tr>
<tr>
<td>Cross-functional workstream management</td>
<td>48%</td>
<td>43%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Sales ops professionals have a distinctive vantage point, with one foot in the here and now and another in the future.

Since 2019, their responsibilities have increased across a broad terrain, ranging from coordination duties like setting up territories to high-level planning such as revenue strategy.

From training and technology to performance analysis, sales ops wears many different hats these days, and colleagues recognize the ops team’s vital contributions to both keeping the lights on and strategizing for growth.

89% of sales professionals say sales ops plays a critical role in growing the business.
Sales Operations Gets a Bigger Seat at the Table

Siloed Departments Yield Disconnected Customer Experiences

78% of customers expect consistent interactions across departments

59% of customers say it generally feels like they’re communicating with separate departments, not one company


Acting as a connector between different revenue-influencing players is an important task. When disconnected processes exist inside the sales organization or the company at large, customers can sense it.

Customer-facing teams operating in silos can lead to jarring experiences, with impersonal or conflicting communications and time-consuming barriers to getting things done.
Sales Operations Gets a Bigger Seat at the Table

Top Sales Ops Teams Bridge the Cross-Functional Gap

In high-performing organizations, sales ops is not just a connector between different people and processes within the sales team; it’s also a bridge to important contacts on other teams, like account-based marketers, customer service leaders, and more.

In this capacity, sales ops can tighten relationships to create greater efficiency.

High Performers vs. Underperformers

more likely to increase sales ops’ cross-functional work management.

Base: At companies with sales ops. See more details on sales ops responsibilities on page 29.
Sales Operations Gets a Bigger Seat at the Table

Digital Transformation Is Accelerating

81% of sales ops say sales technology needs have changed significantly since 2019
81% of sales ops say they implement changes faster than in 2019

Top 5 Sales Tools That Have Become More Valuable Since 2019

1 Video conferencing
2 Artificial intelligence (AI)
3 Mobile sales app(s) for employees
4 Customer relationship management (CRM) system
5 Sales prospecting tools

Base: Sales ops and sales leadership at companies that use the tool.

A primary focus for sales ops continues to be the organization’s sales technology needs – which are evolving rapidly.

84% of sales ops professionals say digital transformation has accelerated since 2019.

Insight selling, video conferencing, and other tech-intensive sales tactics have taken hold. Video conferencing leads the roster of increasingly valuable sales tools – something that will come as no surprise in the midst of a pandemic. AI mobile sales apps and CRM systems have also earned more prominent roles in sales toolkits – as sales ops seeks to provide teams with both on-the-go and data-driven tools to do their jobs.
Sales Operations Gets a Bigger Seat at the Table

AI Reaches Critical Mass with Top Performers

Sales Organizations Reporting AI Use

2018 21%
This year 37%

76% increase

AI Adoption by Sales Performance Level

<table>
<thead>
<tr>
<th>Performance Level</th>
<th>2018</th>
<th>This year</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>High performers</td>
<td>20%</td>
<td>57%</td>
<td>37%</td>
</tr>
<tr>
<td>Moderate performers</td>
<td>31%</td>
<td>31%</td>
<td>0%</td>
</tr>
<tr>
<td>Underperformers</td>
<td>57%</td>
<td>20%</td>
<td>-37%</td>
</tr>
</tbody>
</table>

2.8x more likely to use AI

High performers vs. Underperformers

Base: Sales leaders

A particularly fast-growing technology in sales is AI. While AI is not yet as prevalent in sales as in marketing (where 84% use it), its adoption in sales has shot up in recent years.*

Already, a majority of high-performing sales organizations (57%) are using the technology to improve internal processes and customer experiences.

Use cases for AI extend across many of sales’ major areas of responsibility. However, the technology’s most significant impact, according to salespeople, is on understanding customer needs.

Tapping into these is core to selling under any circumstances, but when customer needs evolve as rapidly as they are now, the task takes on particular resonance.

AI’s second-largest impact is on improving forecasting accuracy – in other words, understanding opportunities – and in so doing, helping organizations make informed decisions even as the norms change.
SALESFORCE RESEARCH

Spotlight:
AI and Sales Hiring

Despite some fears, AI isn’t displacing human talent in sales.

AI-fueled sales teams are adding headcount at a faster pace than their peers, continuing a trend we first observed in our 2018 survey.* Sales organizations using AI are also less likely to be decreasing rep headcount.

This pattern holds true across all sales roles we examined, including inside and outside reps, leadership, sales support, and sales operations.**

The growth of AI in sales thus represents an extension of human capability, not a replacement of it, as reps are tasked with more complex mandates.

** See page 35 for data on AI and headcount for additional sales roles.
Leaders Pivot for Recovery and Growth

As reps keep an ear to the ground and ops realign processes, sales leaders are in the tricky position of steering the ship toward an uncertain future.

While projecting confidence is part of their role, many leaders are genuinely optimistic about the state of things.

That said, there’s a noticeable confidence gap between upper management at the top of the organization and those who work closer to the ground level with reps and sales ops.

VP+ vs. Managers/Directors

1.3x more likely to be completely confident in their organization’s ability to close deals.
Seismic economic and social shifts are prompting sales leaders to reevaluate their needs. For instance, few could have anticipated such a radical shake-up of business as usual while establishing budgets at the start of the fiscal year.

Many leaders admit they’re not completely ready to map key business priorities to changing conditions. For instance, only 26% feel completely capable of adapting team culture, and 28% say the same about staff skills.

However, across the board, top performers feel much better positioned to tackle the challenges ahead – particularly when it comes to technology and sales strategy.

77% of sales leaders say their digital transformation has accelerated since 2019. 

Sales Leaders Reassess Their Organizations’ Needs

Sales Leaders Who Say They’re Completely Capable of Adapting the Following to Changing Conditions*

<table>
<thead>
<tr>
<th>Category</th>
<th>High performers</th>
<th>Moderate performers</th>
<th>Underperformers</th>
<th>High vs. Underperformers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget</td>
<td>52%</td>
<td>17%</td>
<td>12%</td>
<td>4.1x more likely</td>
</tr>
<tr>
<td>Culture</td>
<td>49%</td>
<td>20%</td>
<td>9%</td>
<td>5.6x more likely</td>
</tr>
<tr>
<td>Organizational structure</td>
<td>56%</td>
<td>20%</td>
<td>10%</td>
<td>5.7x more likely</td>
</tr>
<tr>
<td>Staff skills</td>
<td>54%</td>
<td>21%</td>
<td>15%</td>
<td>3.7x more likely</td>
</tr>
<tr>
<td>Strategy</td>
<td>55%</td>
<td>23%</td>
<td>9%</td>
<td>6.3x more likely</td>
</tr>
<tr>
<td>Technology</td>
<td>56%</td>
<td>26%</td>
<td>8%</td>
<td>6.7x more likely</td>
</tr>
</tbody>
</table>

* See page 37 for more information on sales leaders’ capability levels.
Leaders Pivot for Recovery and Growth

Rather than shaking up their teams’ foundations, where possible, leadership is adjusting to new staffing needs by reskilling employees for new or changed roles in the organization.

While it’s unsurprising top sellers lead in these efforts, the gap is vast: High performers are 4.8x more confident in their training abilities than their underperforming peers.

As selling shifts away from the field, a major focus of reskilling efforts is on the outside sales team. Seventy percent of organizations are now retraining field reps to sell from home, where they’re braving new technologies and ways of engaging customers.

Sales Leaders Reassess Their Organization’s Needs

**Planned Tactics for Addressing Staffing Needs***

- **64%** Reskilling existing employees
- **47%** Hiring new employees
- **33%** Laying off existing employees

* Base: Sales leadership.
** Responses of “completely confident” or “mostly confident.”
Beyond reskilling, sales leaders have many other tools at their disposal to steer their sales organizations toward success.

As always, the first priority is adapting to the customer. Rigid deal terms that worked historically may need revision as customers buy more cautiously. Leaders recognize that flexibility is key, rating it as their top tactic for success over the next 12 months.

High-quality, accessible data – the linchpin of informed decision-making – is also viewed as critical.

Fortunately for sales leaders, the rank and file on the ground with customers are aligned with them on which tactics will carry the business forward.*

* See page 38 for full lists for each role of ranked tactics.

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**Sales Leaders’ Top 5 Tactics for Success over the Next 12 Months**

1. Increased flexibility with customers
2. Improved data quality and accessibility
3. Simplified sales processes
4. Personalized outreach
5. Improved cross-functional partnerships
### Industries’ Sales Leaders Point to Areas for Growth

#### Top 3 Ways to Drive Company Growth over Next 12 Months*

<table>
<thead>
<tr>
<th>Industry</th>
<th>1. Expanding into new geographies</th>
<th>2. Expanding into new verticals</th>
<th>3. Packaging our products differently</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automotive</td>
<td>Expanding routes to market</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consumer goods</td>
<td>Expanding routes to market</td>
<td>Expanding into new verticals</td>
<td></td>
</tr>
<tr>
<td>Financial services</td>
<td>Expanding inside key accounts</td>
<td>Expanding into new verticals</td>
<td></td>
</tr>
<tr>
<td>Healthcare, life sciences &amp; biotechnology</td>
<td>Expanding routes to market</td>
<td>Expanding into new verticals</td>
<td></td>
</tr>
<tr>
<td>Manufacturing</td>
<td>Expanding into new geographies</td>
<td>Expanding routes to market</td>
<td></td>
</tr>
<tr>
<td>Media, entertainment &amp; communications</td>
<td>Expanding into new geographies</td>
<td>Expanding into new geographies</td>
<td></td>
</tr>
<tr>
<td>Professional &amp; business services</td>
<td>Expanding routes to market</td>
<td>Expanding inside key accounts</td>
<td></td>
</tr>
<tr>
<td>Retail</td>
<td>Expanding into new verticals</td>
<td>Expanding inside key accounts</td>
<td></td>
</tr>
<tr>
<td>Technology</td>
<td>Expanding into new geographies</td>
<td>Expanding inside key accounts</td>
<td></td>
</tr>
<tr>
<td>Transportation &amp; hospitality</td>
<td>Expanding into new geographies</td>
<td>Expanding routes to market</td>
<td></td>
</tr>
</tbody>
</table>

*Ranked by percentage who say tactic is “critically important.” Base: sales leadership.
Sales Professionals Who Agree with the Following

- **72%** of reps say they care about the challenges customers are facing.

- **75%** of reps connect to customers on a personal level.

- **48%** of reps say they care about the challenges customers are facing.

- **48%** I've been productive at work amid the COVID-19 pandemic.

- **48%** I'm less productive at work than I used to be.

**STATE OF SALES**
## Frequency with Which Reps Monitor Information Sources to Inform Their Selling

### News
<table>
<thead>
<tr>
<th>Source</th>
<th>At least daily</th>
<th>At least weekly</th>
<th>At least monthly</th>
<th>Less than monthly</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>National news</td>
<td>59%</td>
<td>26%</td>
<td>10%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Local news</td>
<td>58%</td>
<td>26%</td>
<td>10%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Industry news</td>
<td>46%</td>
<td>38%</td>
<td>13%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>International news</td>
<td>38%</td>
<td>35%</td>
<td>15%</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>

### Insights
<table>
<thead>
<tr>
<th>Source</th>
<th>At least daily</th>
<th>At least weekly</th>
<th>At least monthly</th>
<th>Less than monthly</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer communication history</td>
<td>25%</td>
<td>40%</td>
<td>25%</td>
<td>8%</td>
<td>2%</td>
</tr>
<tr>
<td>Customer purchase history</td>
<td>21%</td>
<td>42%</td>
<td>29%</td>
<td>6%</td>
<td>2%</td>
</tr>
<tr>
<td>Competitor activity</td>
<td>20%</td>
<td>40%</td>
<td>28%</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>Customer staffing changes</td>
<td>15%</td>
<td>29%</td>
<td>30%</td>
<td>18%</td>
<td>8%</td>
</tr>
</tbody>
</table>
Degree of Challenge Reps Face When Seeking Customer Insights

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Major Challenge</th>
<th>Moderate Challenge</th>
<th>Improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Having enough time</td>
<td>32%</td>
<td>44%</td>
<td>77%</td>
</tr>
<tr>
<td>Figuring out what’s most valuable</td>
<td>26%</td>
<td>49%</td>
<td>75%</td>
</tr>
<tr>
<td>Having capabilities to extract meaning from data</td>
<td>24%</td>
<td>49%</td>
<td>72%</td>
</tr>
<tr>
<td>Knowing how to access the information</td>
<td>23%</td>
<td>42%</td>
<td>64%</td>
</tr>
</tbody>
</table>

Base: Sales reps.

Reps Who Say They Spend Too Much Time Doing the Following

<table>
<thead>
<tr>
<th>Activity</th>
<th>Major Challenge</th>
<th>Moderate Challenge</th>
<th>Improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discovering a customer’s/prospect’s needs</td>
<td>40%</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>Creating follow-up tasks</td>
<td>41%</td>
<td>47%</td>
<td>40%</td>
</tr>
<tr>
<td>Researching competitive activity</td>
<td>40%</td>
<td>46%</td>
<td>34%</td>
</tr>
<tr>
<td>Reviewing pipeline</td>
<td>38%</td>
<td>43%</td>
<td>34%</td>
</tr>
</tbody>
</table>

When sales ops is a key player defining strategy

When sales ops only supports execution of strategy
## Extent to Which Sales Ops Is Involved in the Following

<table>
<thead>
<tr>
<th>Area</th>
<th>Owns exclusively</th>
<th>Co-owns</th>
<th>Contributes</th>
<th>Not involved</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales performance analysis</td>
<td>37%</td>
<td>40%</td>
<td>21%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Sales strategy planning</td>
<td>36%</td>
<td>40%</td>
<td>22%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Sales strategy coordination</td>
<td>35%</td>
<td>41%</td>
<td>21%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Sales training management</td>
<td>34%</td>
<td>37%</td>
<td>24%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Sales technology management</td>
<td>34%</td>
<td>38%</td>
<td>24%</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Cross-functional workstream manag</td>
<td>29%</td>
<td>40%</td>
<td>27%</td>
<td>4%</td>
<td></td>
</tr>
</tbody>
</table>

Base: Company has sales operations.
Sales Organizations Using the Following Tools

<table>
<thead>
<tr>
<th>Tool</th>
<th>This Year</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email/CRM integration*</td>
<td>79%</td>
<td>61%</td>
</tr>
<tr>
<td>Sales reporting/analytics</td>
<td>67%</td>
<td>70%</td>
</tr>
<tr>
<td>Sales forecasting tools</td>
<td>64%</td>
<td>57%</td>
</tr>
<tr>
<td>Compensation/incentive management</td>
<td>58%</td>
<td>48%</td>
</tr>
<tr>
<td>Mobile sales app(s) for employees</td>
<td>57%</td>
<td>45%</td>
</tr>
<tr>
<td>Customer insight tool</td>
<td>51%</td>
<td>44%</td>
</tr>
<tr>
<td>Marketing automation</td>
<td>49%</td>
<td>34%</td>
</tr>
<tr>
<td>Configure-price-quote (CPQ) solution</td>
<td>48%</td>
<td>38%</td>
</tr>
<tr>
<td>Account and contact management</td>
<td>70%</td>
<td>65%</td>
</tr>
<tr>
<td>Customer relationship management (CRM) system</td>
<td>65%</td>
<td>59%</td>
</tr>
<tr>
<td>Sales coaching and training solution</td>
<td>62%</td>
<td>55%</td>
</tr>
<tr>
<td>Sales prospecting tools</td>
<td>58%</td>
<td>45%</td>
</tr>
<tr>
<td>Sales process automation</td>
<td>53%</td>
<td>41%</td>
</tr>
<tr>
<td>Opportunity management</td>
<td>51%</td>
<td>40%</td>
</tr>
<tr>
<td>Competitive intelligence</td>
<td>49%</td>
<td>48%</td>
</tr>
<tr>
<td>Partner relationship management (PRM) solution</td>
<td>48%</td>
<td>35%</td>
</tr>
</tbody>
</table>

Base: Sales operations and sales leadership. 2018’s “sales leadership” category has been modified to exclude C-level executives, to match this year’s data.

*Base: Sales operations and sales leadership at companies that use a CRM.
Sales Professionals Who Are Confident About the Following

- **Future of role**: 67%
  - Sales leaders: 60%
  - Reps: 67%
  - Sales operations: 72%
  - Sales support: 68%

- **Company’s long-term resiliency**: 64%
  - Sales leaders: 63%
  - Reps: 60%
  - Sales operations: 71%
  - Sales support: 66%

- **Company’s agility**: 65%
  - Sales leaders: 65%
  - Reps: 58%
  - Sales operations: 74%
  - Sales support: 68%

- **Sales organization’s ability to train/reskill reps**: 63%
  - Sales leaders: 62%
  - Reps: 56%
  - Sales operations: 71%
  - Sales support: 66%

- **Sales organization’s agility**: 65%
  - Sales leaders: 65%
  - Reps: 58%
  - Sales operations: 72%
  - Sales support: 67%

- **Company’s growth strategy for the next 12 months**: 60%
  - Sales leaders: 59%
  - Reps: 54%
  - Sales operations: 70%
  - Sales support: 61%

- **Sales organization’s ability to close deals in the current economic environment**: 65%
  - Sales leaders: 63%
  - Reps: 58%
  - Sales operations: 73%
  - Sales support: 67%

Responses of “completely confident” or “mostly confident.”
88% of sales professionals say their manager has clearly communicated business priorities.

73% of sales leaders say sales technology needs have changed significantly since 2019.

71% of sales leaders say they implement changes faster than in 2019.
### Headcount Changes Since 2019 By Sales Organization AI Use

#### Using AI

<table>
<thead>
<tr>
<th></th>
<th>Increased headcount</th>
<th>No change</th>
<th>Decreased headcount</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sales ops</strong></td>
<td>57%</td>
<td>32%</td>
<td>11%</td>
</tr>
<tr>
<td><strong>Channel/partner sales</strong></td>
<td>53%</td>
<td>33%</td>
<td>14%</td>
</tr>
<tr>
<td><strong>Sales support</strong></td>
<td>54%</td>
<td>31%</td>
<td>15%</td>
</tr>
</tbody>
</table>

#### Planning to Use AI

<table>
<thead>
<tr>
<th></th>
<th>Increased headcount</th>
<th>No change</th>
<th>Decreased headcount</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sales ops</strong></td>
<td>43%</td>
<td>40%</td>
<td>17%</td>
</tr>
<tr>
<td><strong>Channel/partner sales</strong></td>
<td>40%</td>
<td>40%</td>
<td>20%</td>
</tr>
<tr>
<td><strong>Sales support</strong></td>
<td>43%</td>
<td>39%</td>
<td>18%</td>
</tr>
</tbody>
</table>

#### Not Planning to Use AI

<table>
<thead>
<tr>
<th></th>
<th>Increased headcount</th>
<th>No change</th>
<th>Decreased headcount</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sales ops</strong></td>
<td>15%</td>
<td>54%</td>
<td>30%</td>
</tr>
<tr>
<td><strong>Channel/partner sales</strong></td>
<td>15%</td>
<td>57%</td>
<td>27%</td>
</tr>
<tr>
<td><strong>Sales support</strong></td>
<td>15%</td>
<td>57%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Base: Sales leadership at companies with sales ops, channel/partner sales, and sales support, respectively.
# Changes in Headcount Across Sales Roles Since 2019

<table>
<thead>
<tr>
<th>Role</th>
<th>Increased</th>
<th>Maintained</th>
<th>Decreased</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inside sales</td>
<td>41%</td>
<td>41%</td>
<td>17%</td>
</tr>
<tr>
<td>Sales operations</td>
<td>40%</td>
<td>42%</td>
<td>18%</td>
</tr>
<tr>
<td>Channel/partner sales reps</td>
<td>39%</td>
<td>42%</td>
<td>19%</td>
</tr>
<tr>
<td>Sales support</td>
<td>39%</td>
<td>42%</td>
<td>20%</td>
</tr>
<tr>
<td>Outside sales</td>
<td>36%</td>
<td>38%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Sales Leaders Who Say They Will Adjust Staffing in the Following Ways

- **Reskill existing employees**
  - High performers: 65%
  - Moderate performers: 56%
  - Underperformers: 56%

- **Hire new employees**
  - High performers: 60%
  - Moderate performers: 46%
  - Underperformers: 42%

- **Lay off existing employees**
  - High performers: 37%
  - Moderate performers: 30%
  - Underperformers: 42%

*Base: Sales leadership.*
Degree of Improvement to the Following From Artificial Intelligence

<table>
<thead>
<tr>
<th>Area</th>
<th>Major Improvement</th>
<th>Moderate Improvement</th>
<th>Minor Improvement</th>
<th>No Improvement</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understanding customer needs</td>
<td>52%</td>
<td>32%</td>
<td>13%</td>
<td>2%</td>
<td>100%</td>
</tr>
<tr>
<td>Forecasting</td>
<td>47%</td>
<td>38%</td>
<td>12%</td>
<td>2%</td>
<td>100%</td>
</tr>
<tr>
<td>Visibility into rep activity</td>
<td>46%</td>
<td>38%</td>
<td>13%</td>
<td>2%</td>
<td>100%</td>
</tr>
<tr>
<td>Competitive intelligence</td>
<td>46%</td>
<td>37%</td>
<td>14%</td>
<td>2%</td>
<td>100%</td>
</tr>
<tr>
<td>Lead prioritization</td>
<td>46%</td>
<td>38%</td>
<td>13%</td>
<td>2%</td>
<td>100%</td>
</tr>
<tr>
<td>Use of reps' time</td>
<td>45%</td>
<td>36%</td>
<td>16%</td>
<td>2%</td>
<td>100%</td>
</tr>
<tr>
<td>Personalization for customers</td>
<td>45%</td>
<td>40%</td>
<td>13%</td>
<td>2%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Base: Sales operations and sales leadership at companies using AI.
## Importance of the Following to Driving Company Growth over Next 12 Months

<table>
<thead>
<tr>
<th>Activity</th>
<th>Critically Important</th>
<th>Very Important</th>
<th>Moderately Important</th>
<th>Slightly Important</th>
<th>Not at All Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expanding routes to market</td>
<td>28%</td>
<td>45%</td>
<td>19%</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Expanding inside key accounts</td>
<td>26%</td>
<td>46%</td>
<td>21%</td>
<td>5%</td>
<td>1%</td>
</tr>
<tr>
<td>Expanding into new verticals</td>
<td>26%</td>
<td>43%</td>
<td>21%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>Expanding into new geographies</td>
<td>28%</td>
<td>40%</td>
<td>21%</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Obtaining net new logos</td>
<td>23%</td>
<td>35%</td>
<td>23%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Packaging our products differently</td>
<td>22%</td>
<td>34%</td>
<td>23%</td>
<td>10%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Base: Sales leadership.
Capability of Sales Organizations to Adapt the Following to Change

- **Technology**
  - Completely capable: 31%
  - Mostly capable: 40%
  - Moderately capable: 21%
  - Slightly capable: 7%
  - Not at all capable: 1%

- **Strategy**
  - Completely capable: 29%
  - Mostly capable: 44%
  - Moderately capable: 21%
  - Slightly capable: 6%
  - Not at all capable: 1%

- **Staff skills**
  - Completely capable: 28%
  - Mostly capable: 41%
  - Moderately capable: 23%
  - Slightly capable: 7%
  - Not at all capable: 1%

- **Organizational structure**
  - Completely capable: 27%
  - Mostly capable: 40%
  - Moderately capable: 24%
  - Slightly capable: 8%
  - Not at all capable: 1%

- **Culture**
  - Completely capable: 26%
  - Mostly capable: 37%
  - Moderately capable: 27%
  - Slightly capable: 9%
  - Not at all capable: 1%

- **Budget**
  - Completely capable: 25%
  - Mostly capable: 39%
  - Moderately capable: 27%
  - Slightly capable: 8%
  - Not at all capable: 2%

Base: Sales leadership.
### Sales Teams’ Top-Ranked Tactics for Success over the Next 12 Months

<table>
<thead>
<tr>
<th>Sales Leaders</th>
<th>Outside Reps</th>
<th>Inside Reps</th>
<th>Sales Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Increased flexibility with customers</td>
<td>Increased flexibility with customers</td>
<td>Increased flexibility with customers</td>
</tr>
<tr>
<td>2</td>
<td>Improved data quality and accessibility</td>
<td>Personalized outreach</td>
<td>Improved data quality and accessibility</td>
</tr>
<tr>
<td>3</td>
<td>Simplified sales processes</td>
<td>Simplified sales processes</td>
<td>Personalized outreach</td>
</tr>
<tr>
<td>4</td>
<td>Personalized outreach</td>
<td>Improved cross-functional partnerships</td>
<td>Simplified sales processes</td>
</tr>
<tr>
<td>5</td>
<td>Improved cross-functional partnerships</td>
<td>Improved data quality and accessibility</td>
<td>Improved cross-functional partnerships</td>
</tr>
<tr>
<td>6</td>
<td>Revised KPIs</td>
<td>Revised KPIs</td>
<td>Revised KPIs</td>
</tr>
<tr>
<td>7</td>
<td>Revised sales staff training</td>
<td>Revised sales staff training</td>
<td>Revised sales staff training</td>
</tr>
<tr>
<td>8</td>
<td>Revised lead prioritization criteria</td>
<td>Revised lead prioritization criteria</td>
<td>Revised lead prioritization criteria</td>
</tr>
<tr>
<td>9</td>
<td>Revised sales territories</td>
<td>Revised sales cadence</td>
<td>Revised sales territories</td>
</tr>
<tr>
<td>10</td>
<td>Revised sales cadence</td>
<td>Revised sales territories</td>
<td>Revised lead prioritization criteria</td>
</tr>
</tbody>
</table>
SURVEY DEMOGRAPHICS
Survey Demographics

**Industry**
- Architecture, engineering, and construction 3%
- Automotive 4%
- Communications 2%
- Consumer goods 9%
- Energy and utilities 3%
- Financial services 7%
- Healthcare 4%
- Hospitality 2%
- Life sciences and biotechnology 2%
- Manufacturing 16%
- Media and entertainment 2%
- Professional and business services 11%
- Retail 17%
- Technology 12%
- Transportation and hospitality 4%
- Other 2%

**Company Type**
- Business-to-business (B2B) 65%
- Business-to-business-to-consumer (B2B2C) 35%

**Role Within Sales**
- Sales leadership/head of sales 11%
- Sales manager or director 26%
- Sales representative: inside sales 13%
- Sales representative: outside sales 13%
- Sales support 15%
- Sales operations 22%

**Company Size**
- Small (21–100 employees) 16%
- Medium (101–3,500 employees) 56%
- Enterprise (3,501+ employees) 28%

**Generation**
- Baby boomers 12%
- Gen Xers 43%
- Millennials 44%
- Gen Zers 1%

**Region**
- Europe, Middle East, and Africa 53%
- Asia Pacific 34%
- North America 13%

**Country**
- Australia/New Zealand 5%
- Belgium 5%
- Canada 5%
- France 5%
- Germany 5%
- Hong Kong 3%
- India 5%
- Italy 5%
- Japan 5%
- Netherlands 5%
- Nordics 3%
- Philippines 3%
- Poland 5%
- Singapore 3%
- South Africa 4%
- South Korea 5%
- Spain 6%
- Switzerland 4%
- Thailand 3%
- United Arab Emirates 1%
- United Kingdom 5%
- United States 8%
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Segment by industry
Segment “State of Sales” data by industry.

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