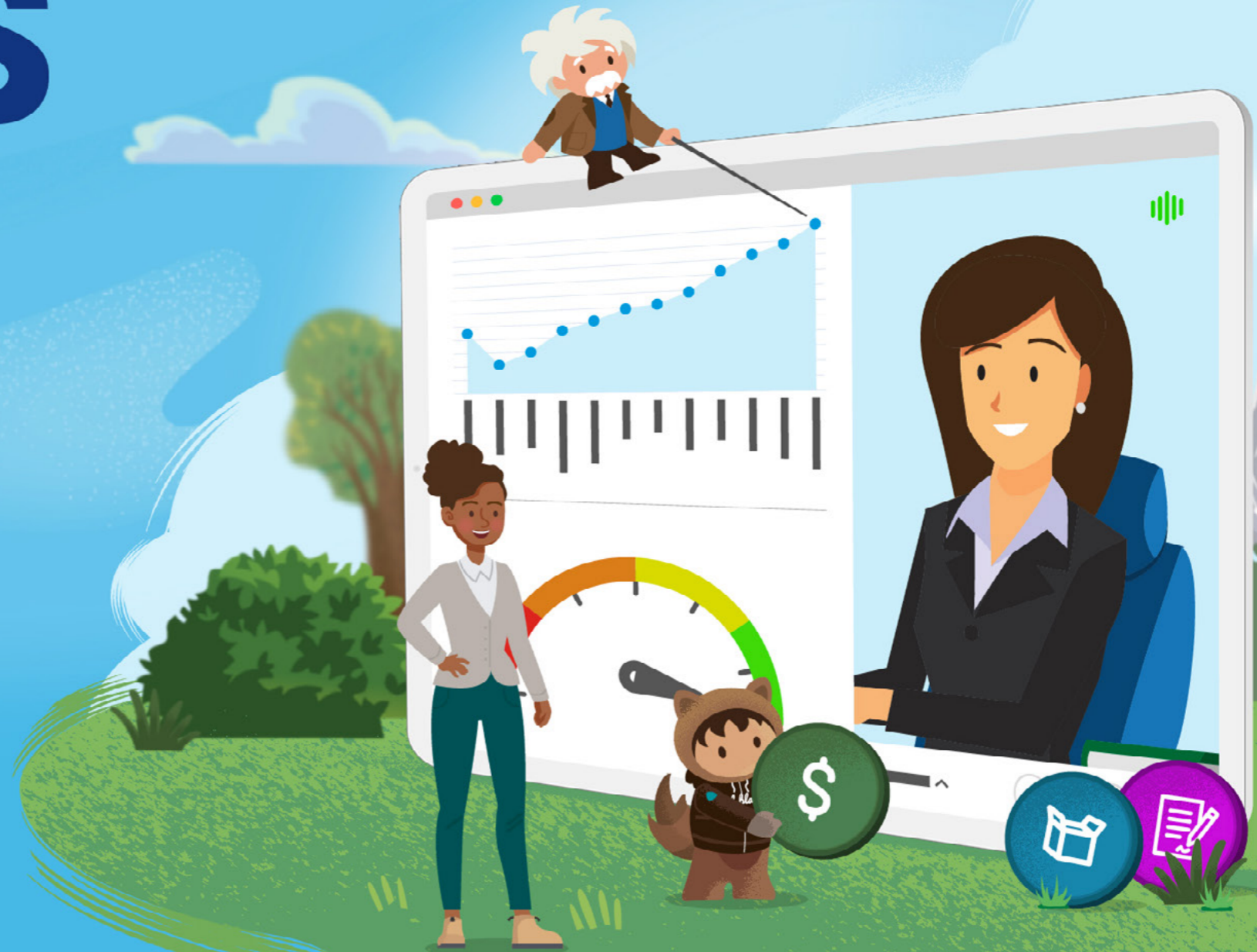


FOURTH EDITION

STATE *of* SALES

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



salesforce

What You'll Find in This Report

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.



Nearly
6,000
sales professionals surveyed worldwide

- North America
- Asia Pacific
- Europe
- Middle East
- Africa

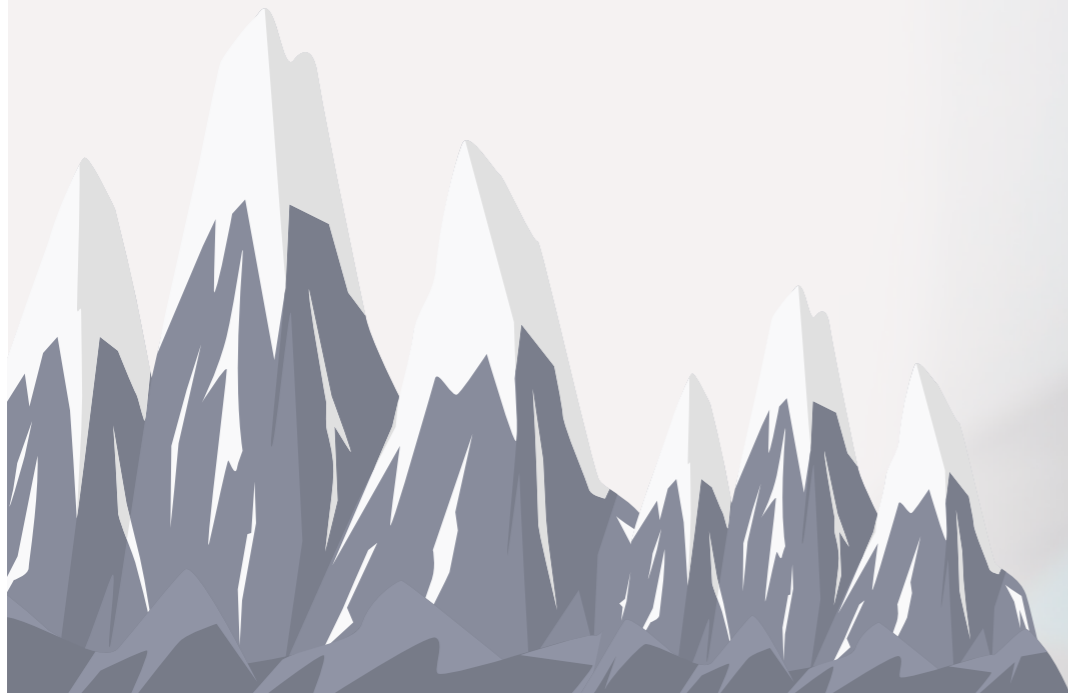


What You'll Find in This Report

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.

68%

Moderate performers

All other sales organizations

9%

Underperformers

Slightly or not confident in their ability to close deals

24%

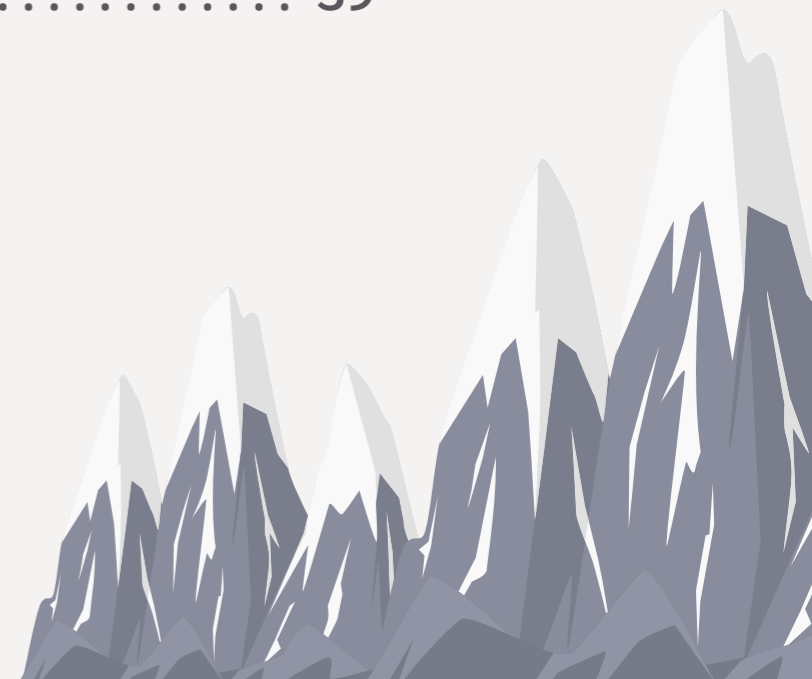
High performers

Completely confident in their ability to close deals



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- 01** | Reps Retool Tactics for a New Selling Landscape 07
- 02** | Sales Operations Gets a Bigger Seat at the Table 12
- 03** | Leaders Pivot for Recovery and Growth 20
- Look Ahead:** The Industry-by-Industry Path to Growth 24
- Appendix 25
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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.**

01

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.

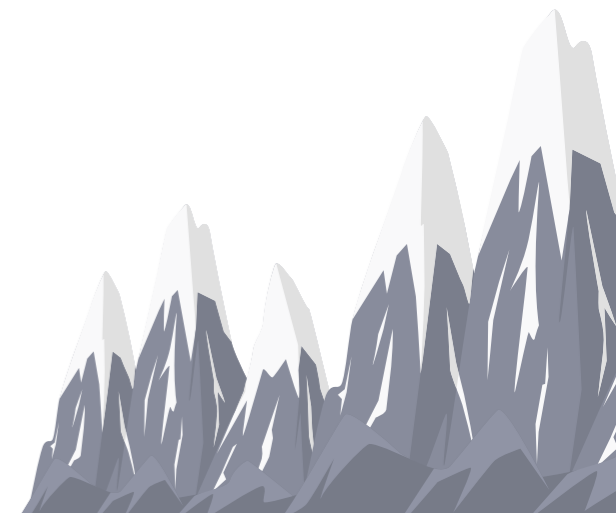
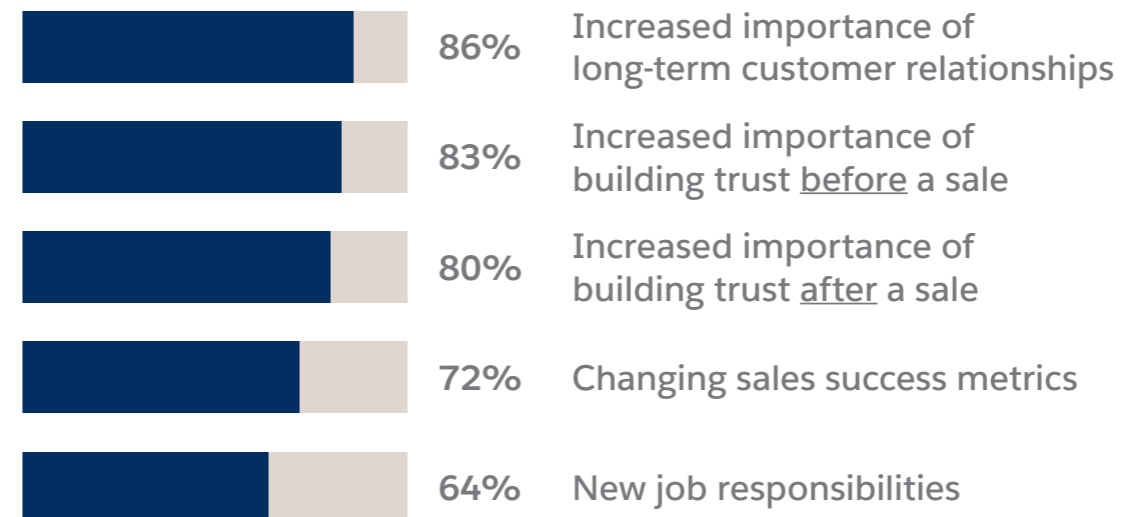
Building trust has always been important. However, it's now even more crucial, as customers and prospects with scarcer resources and foggier outlooks question long-held assumptions.

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



01

Reps Retool Tactics for a New Selling Landscape

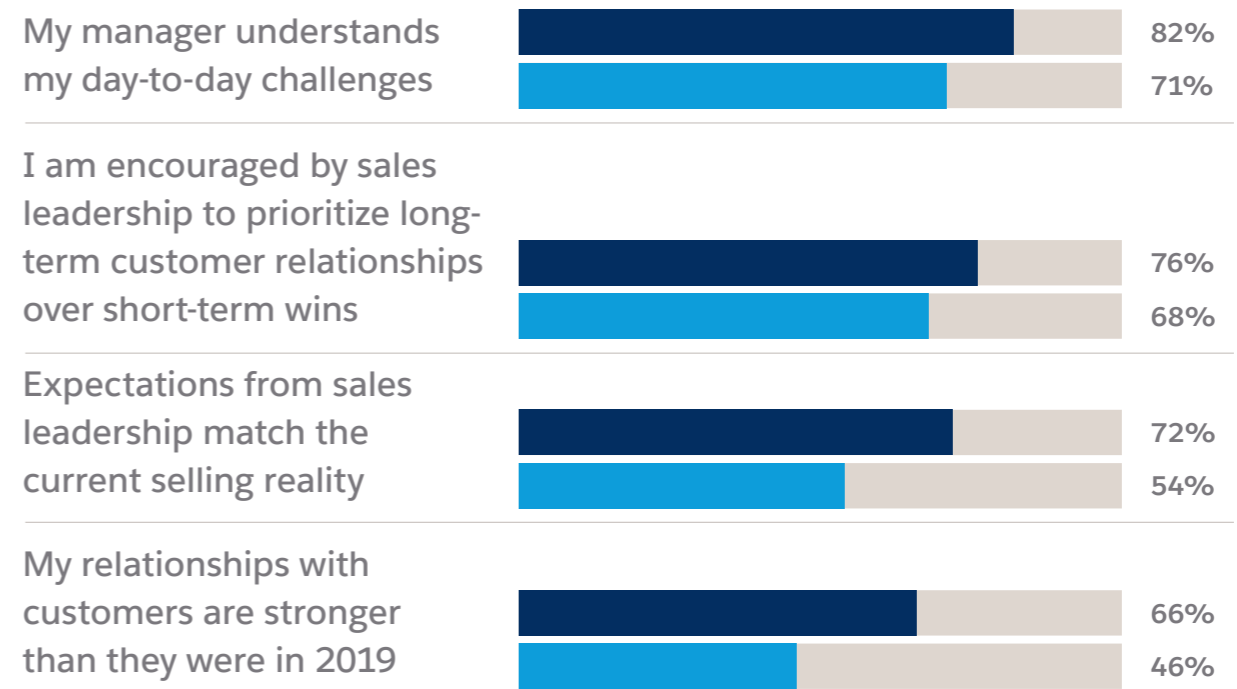
Selling during public health and economic crises isn't easy for anyone, but it's particularly challenging for outside reps.

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.

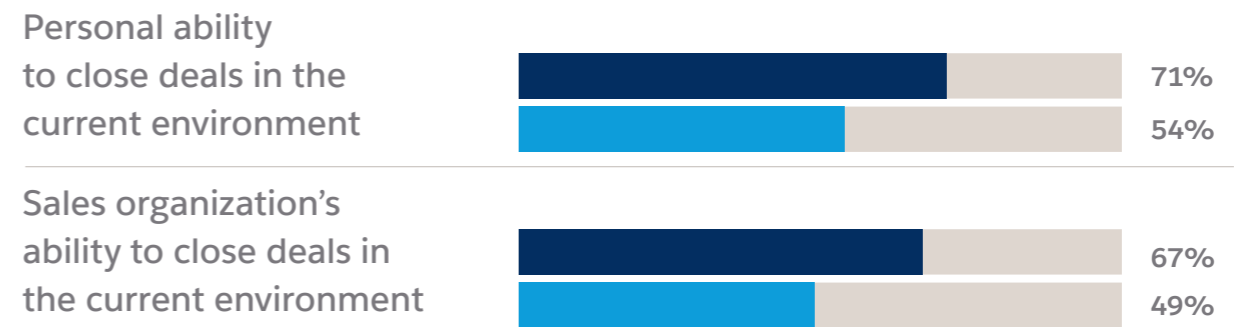
Inside reps' jobs haven't been shaken up in the same way. These reps are more likely to feel their customer relationships are deepening and, ultimately, have more faith in their ability to close deals.

New Realities Hit Outside Reps Hardest

Reps Who Agree with the Following



Reps Who Are Confident About the Following*



■ Inside reps ■ Outside reps

* Responses of "completely confident" or "mostly confident."



01

Reps Retool Tactics for a New Selling Landscape

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.*

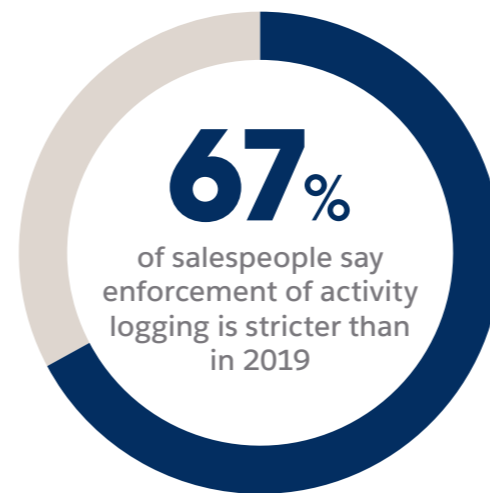
* Base: Outside reps, sales operations, and leaders at companies with outside reps.

Organizations Balance Process and Autonomy

How Sales Organizations Encourage Reps to Operate



How Reps Share Progress with Managers



01

Reps Retool Tactics for a New Selling Landscape

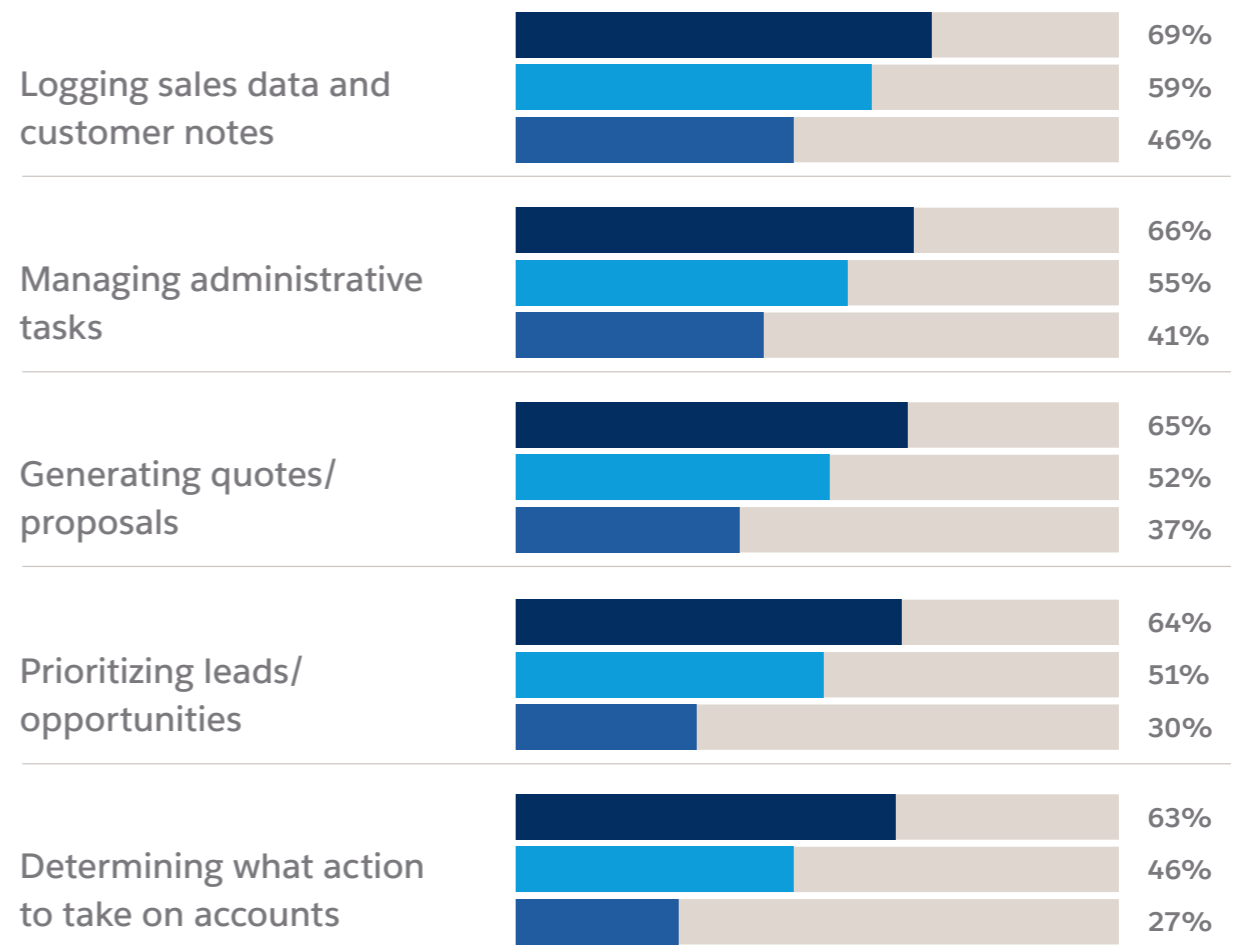
Reps have a long list of job responsibilities, in addition to simply maintaining customer relationships. In 2018, duties like data entry and paperwork filled so many hours that reps only spent one-third of their time actually selling.*

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.

* "State of Sales," Salesforce Research, May 2018.

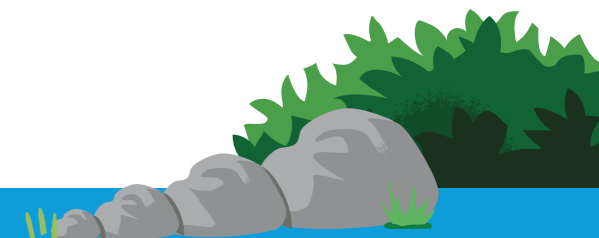
Top Performers Automate Repetitive Tasks

Companies Where the Following Is Automated**



■ High performers ■ Moderate performers ■ Underperformers

** Responses of "completely automated" and "mostly automated."





Spotlight: The Insights That Drive Sales

Reps voraciously devour information from many sources so they can understand and advise customers – powering a process called insight selling.

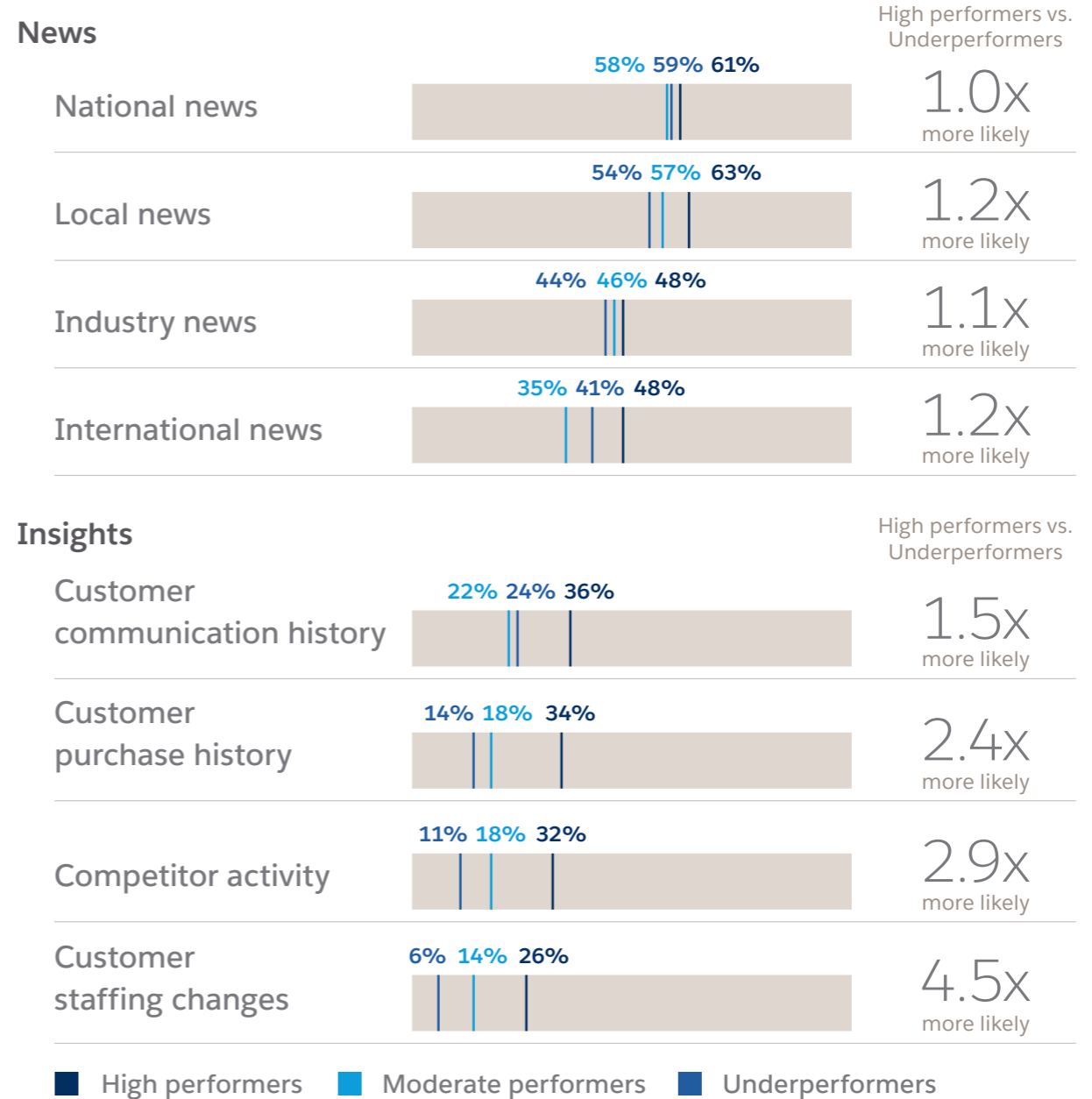
88% of reps say current economic conditions make it important to anticipate customers' needs.

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.

Top Performers Closely Track Deeper Customer Insights

Reps Who Monitor the Following Information Sources Daily



See more detail on monitoring frequency on page 27.

02

Sales Operations Gets a Bigger Seat at the Table

Sales Operations Becomes Increasingly Strategic

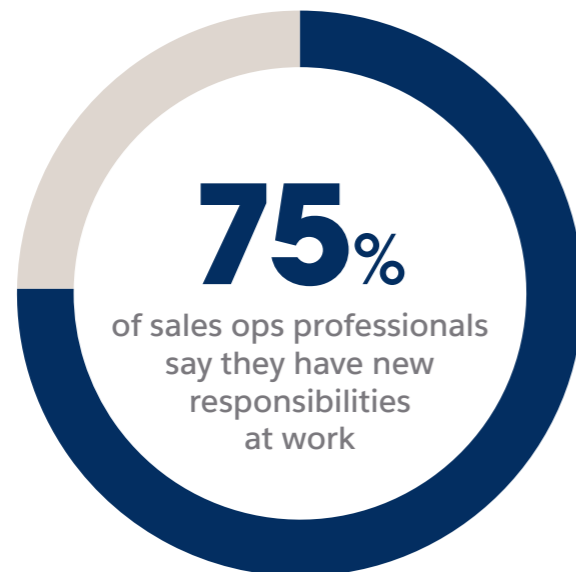
Scope of Sales Operations Teams' Work

Limited to sales strategy execution

44%

Includes sales strategy definition

56%



Base: Company has sales operations.

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.

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

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

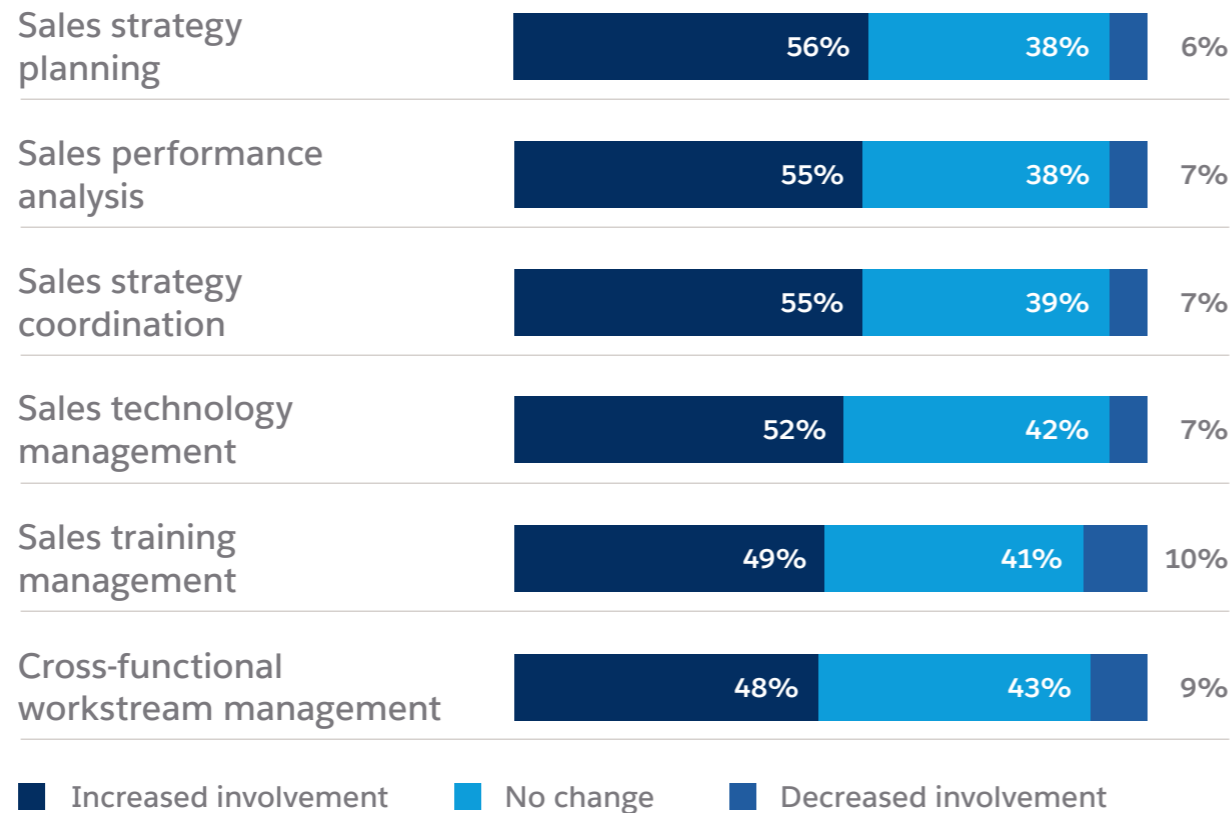
Many companies are taking advantage of sales ops' skill set, with these employees not just supporting sales strategy but also helping define it. The general sentiment is that this is not just a temporary, opportune shift.

02

Sales Operations Gets a Bigger Seat at the Table

The Sales Operations Job Description Is Expanding

Change in Sales Ops Involvement Since 2019



Base: Company has sales operations.
See more details on sales operations involvement across these activities on page 29.

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.

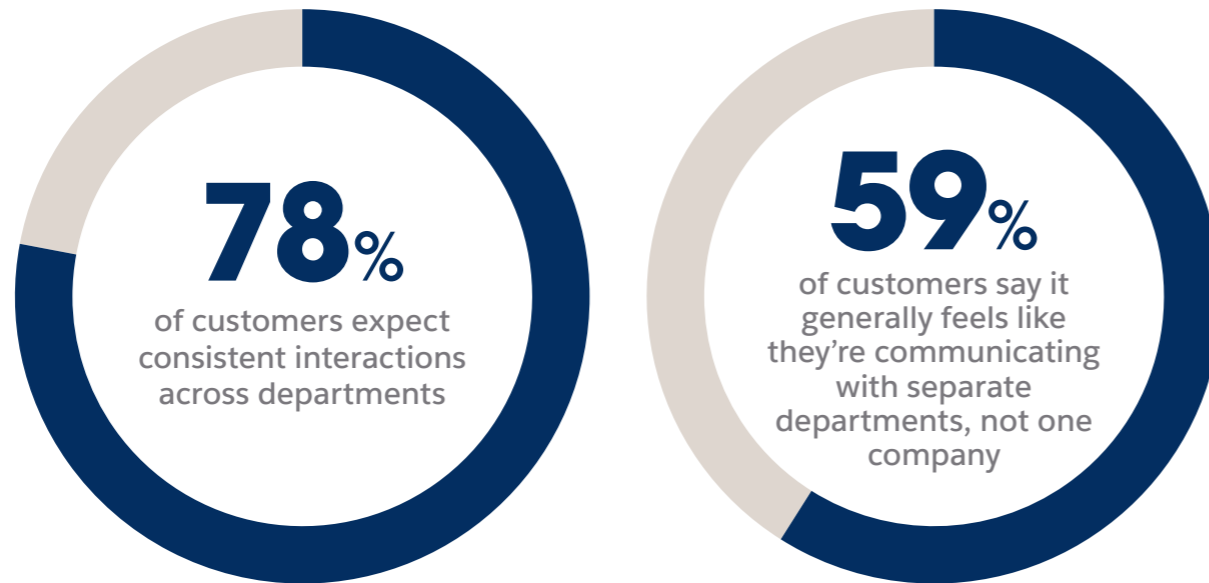
89% of sales professionals say sales ops plays a critical role in growing the business.



02

Sales Operations Gets a Bigger Seat at the Table

Siloed Departments Yield Disconnected Customer Experiences



Source: "State of the Connected Customer," Salesforce Research, June 2019.

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.

02

Sales Operations Gets a Bigger Seat at the Table

Top Sales Ops Teams Bridge the Cross-Functional Gap



Base: At companies with sales ops. See more details on sales ops responsibilities on page 29.

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

2.3x more likely to increase sales ops' cross-functional work management.

02

Sales Operations Gets a Bigger Seat at the Table

Digital Transformation Is Accelerating



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.

02

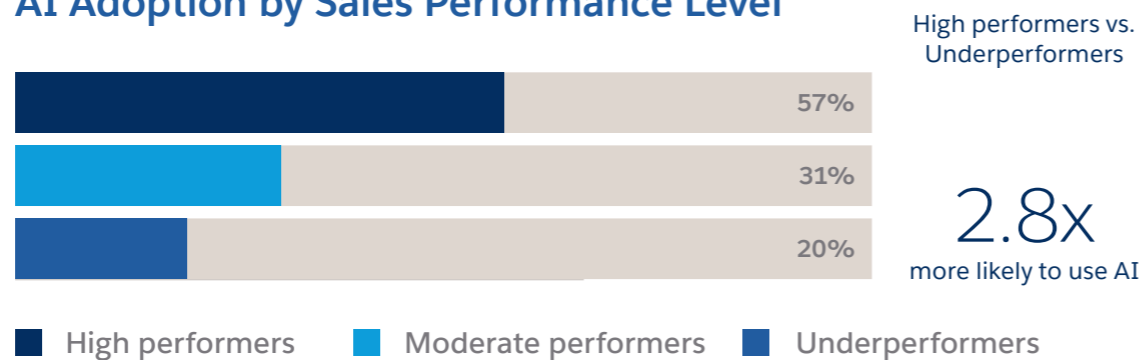
Sales Operations Gets a Bigger Seat at the Table

AI Reaches Critical Mass with Top Performers

Sales Organizations Reporting AI Use



AI Adoption by Sales Performance Level



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.

* Source: "State of Marketing," Salesforce Research, May 2020.



02

Sales Operations Gets a Bigger Seat at the Table

A Surge in AI Adoption Makes Its Mark

Ranking of AI Impacts

- 1 Understanding customer needs
- 2 Forecasting
- 3 Visibility into rep activity
- 4 Competitive intelligence
- 5 Lead prioritization
- 6 Use of reps' time
- 7 Personalization for customers

Base: Sales ops and sales leadership at companies using AI.
Ranked by percentage who say the improvements have been "major."
See full breakdown on page 35.

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.



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.

* "State of Sales," Salesforce Research, May 2018.

** See page 35 for data on AI and headcount for additional sales roles.

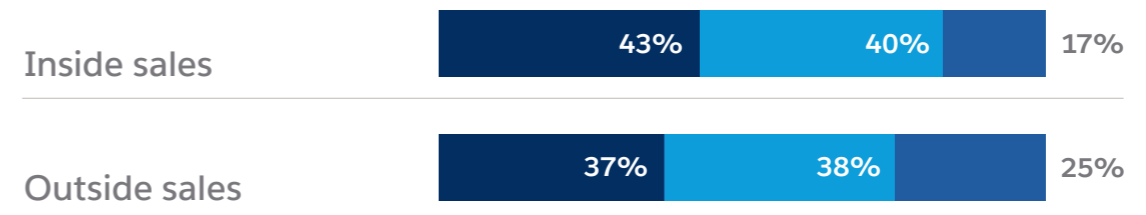
AI and Hiring Go Hand in Hand

Headcount Changes Since 2019 by Sales Organization AI Use

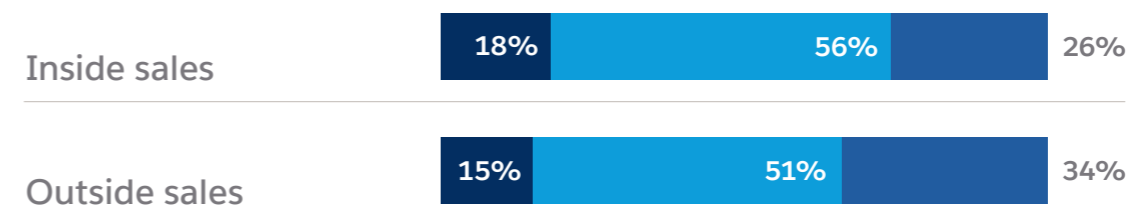
Using AI



Planning to Use AI



Not Planning to Use AI



■ Increased headcount ■ No change ■ Decreased headcount

Base: Sales leadership at companies with inside reps and outside reps, respectively.

03

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.

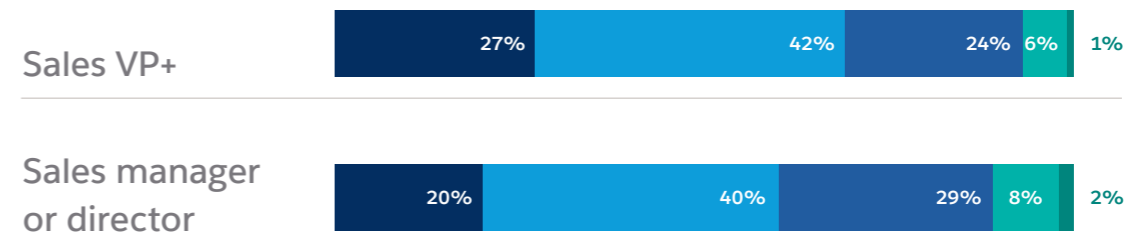
VP+ vs. Managers/Directors

1.3x more likely to be completely confident in their organization's ability to close deals.

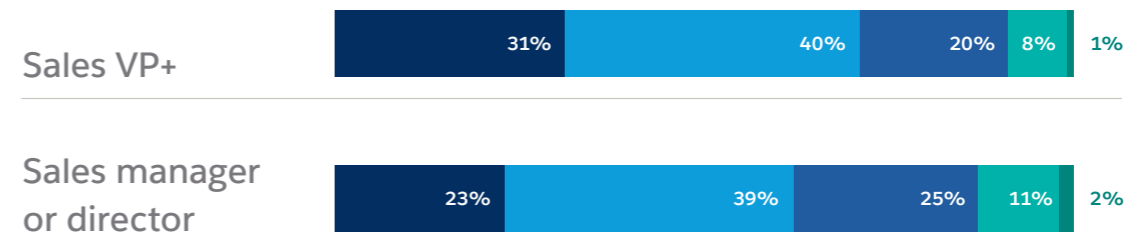
Sales Leaders Are Cautiously Optimistic About the Future

Sales Leaders Confident About the Following

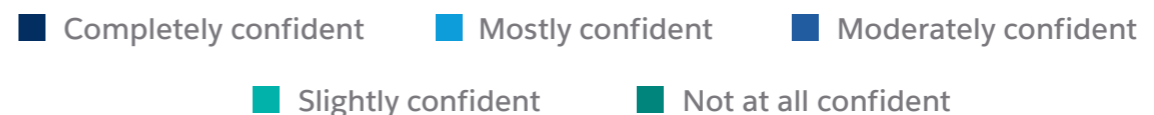
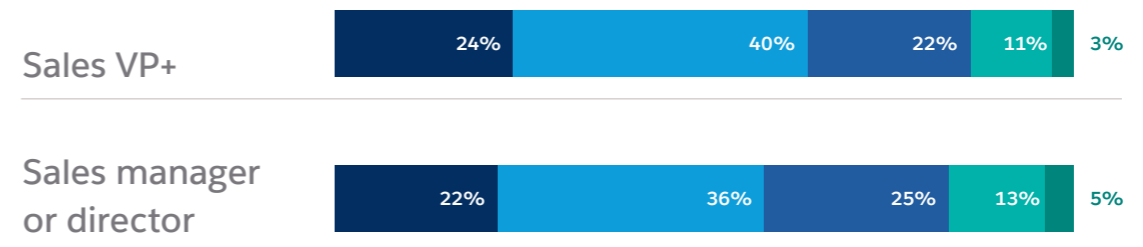
Organization's current ability to close deals



Organization's agility



Company's growth strategy for the next 12 months



03

Leaders Pivot for Recovery and Growth

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.

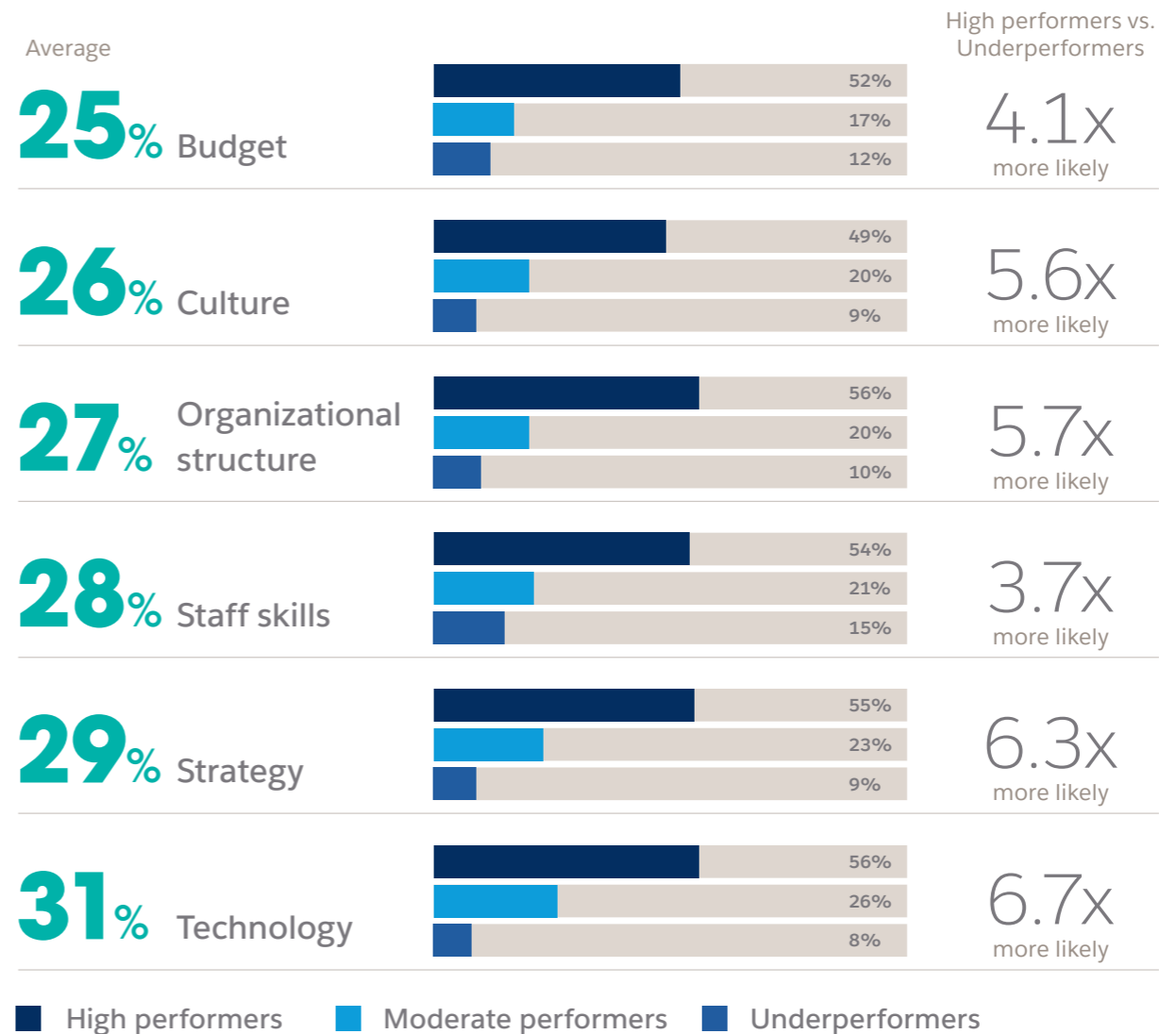
Many leaders admit they're not completely ready to map key business priorities to changing conditions. For instance, only 26% feel completely capable of adapting team culture, and 28% say the same about staff skills.

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*



* See page 37 for more information on sales leaders' capability levels.

03

Leaders Pivot for Recovery and Growth

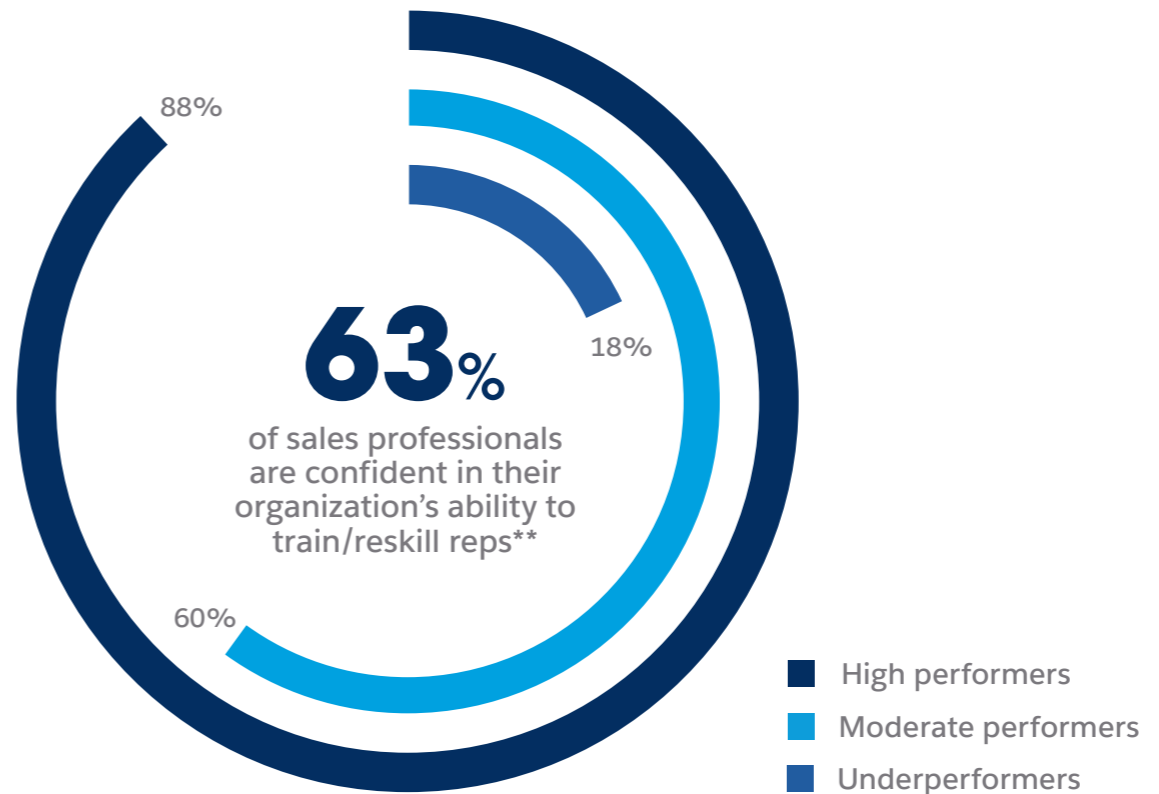
Rather than shaking up their teams' foundations, where possible, leadership is adjusting to new staffing needs by reskilling employees for new or changed roles in the organization.

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*



* Base: Sales leadership.

** Responses of "completely confident" or "mostly confident."



03

Leaders Pivot for Recovery and Growth

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.

Flexibility and Data Point the Way Forward

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





Look Ahead: The Industry-by-Industry Path to Growth

Sales leaders across different industries need to address distinct customer pain points. How will sales teams in each industry propel growth? Many sales leaders are looking to experiment with new routes to market – like direct-to-consumer – and growing their geographic footprint.

Go to salesforce.com/stateofsales/tableau to segment more data by industry and country.

Industries' Sales Leaders Point to Areas for Growth

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



Automotive

- 1 Expanding into new geographies
- 2 Expanding into new verticals
- 3 Packaging our products differently



Consumer goods

- 1 Expanding routes to market
- 2 Expanding into new geographies
- 3 Expanding into new verticals



Financial services

- 1 Expanding inside key accounts
- 2 Expanding routes to market
- 2 Expanding into new verticals



Healthcare, life sciences & biotechnology

- 1 Expanding routes to market
- 2 Expanding into new verticals
- 3 Packaging our products differently



Manufacturing

- 1 Expanding into new geographies
- 2 Expanding routes to market
- 3 Obtaining net new logos



Media, entertainment & communications

- 1 Expanding into new geographies
- 2 Expanding into new verticals
- 3 Expanding inside key accounts



Professional & business services

- 1 Expanding routes to market
- 2 Expanding into new geographies
- 2 Packaging our products differently



Retail

- 1 Expanding routes to market
- 2 Expanding inside key accounts
- 3 Expanding into new geographies



Technology

- 1 Expanding into new geographies
- 2 Expanding inside key accounts
- 3 Expanding routes to market



Transportation & hospitality

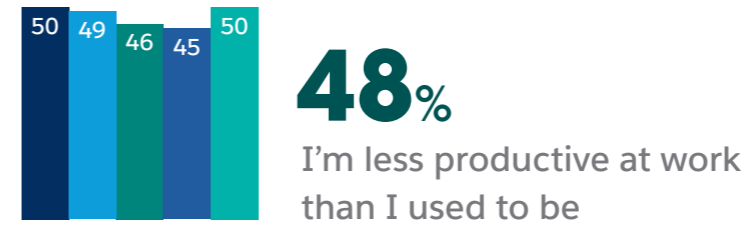
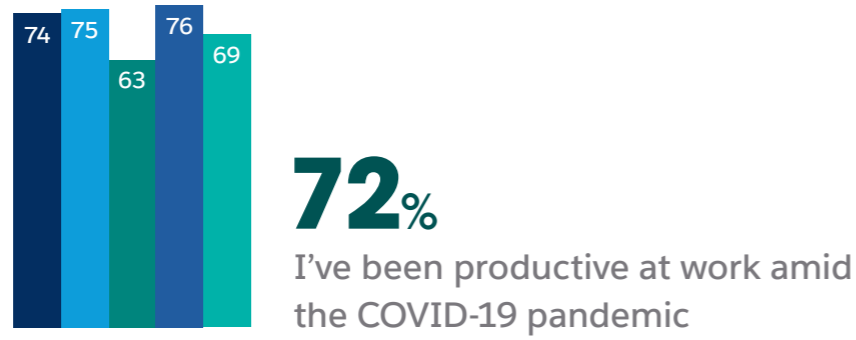
- 1 Expanding inside key accounts
- 2 Expanding into new geographies
- 3 Expanding routes to market

* Ranked by percentage who say tactic is "critically important." Base: sales leadership.

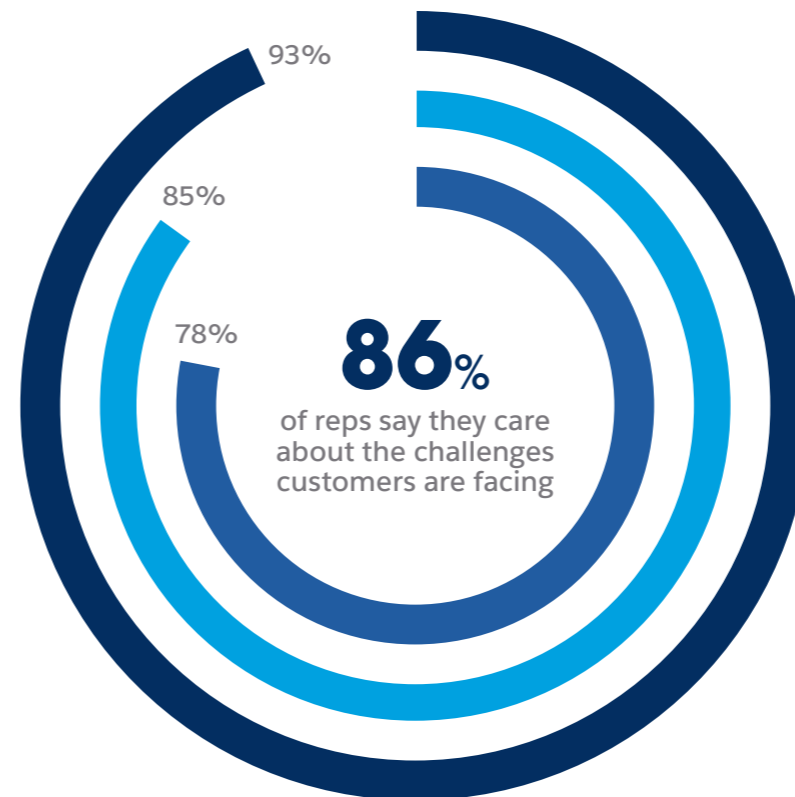
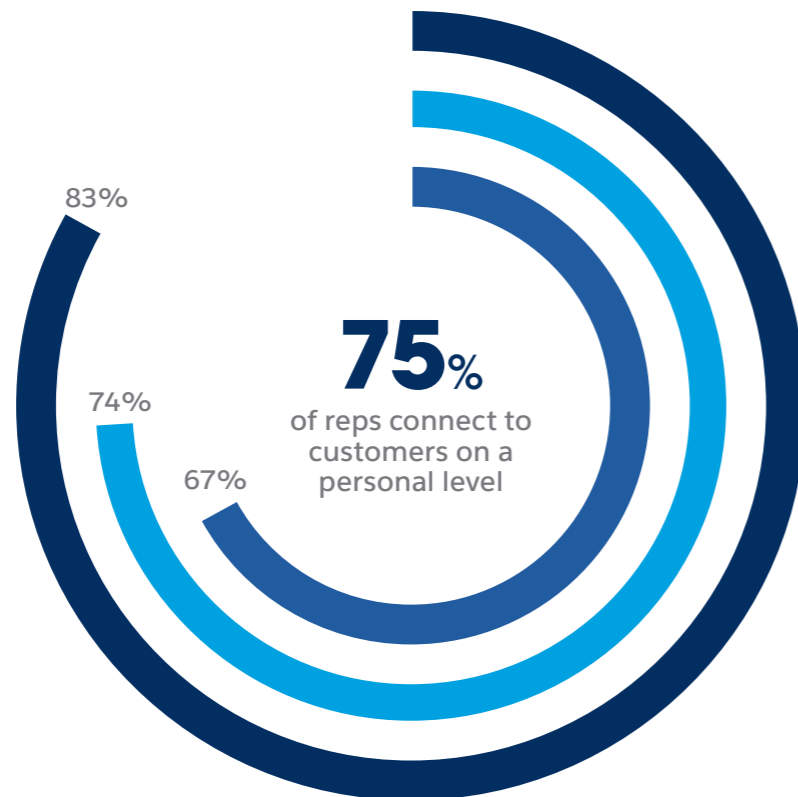
APPENDIX



Sales Professionals Who Agree with the Following



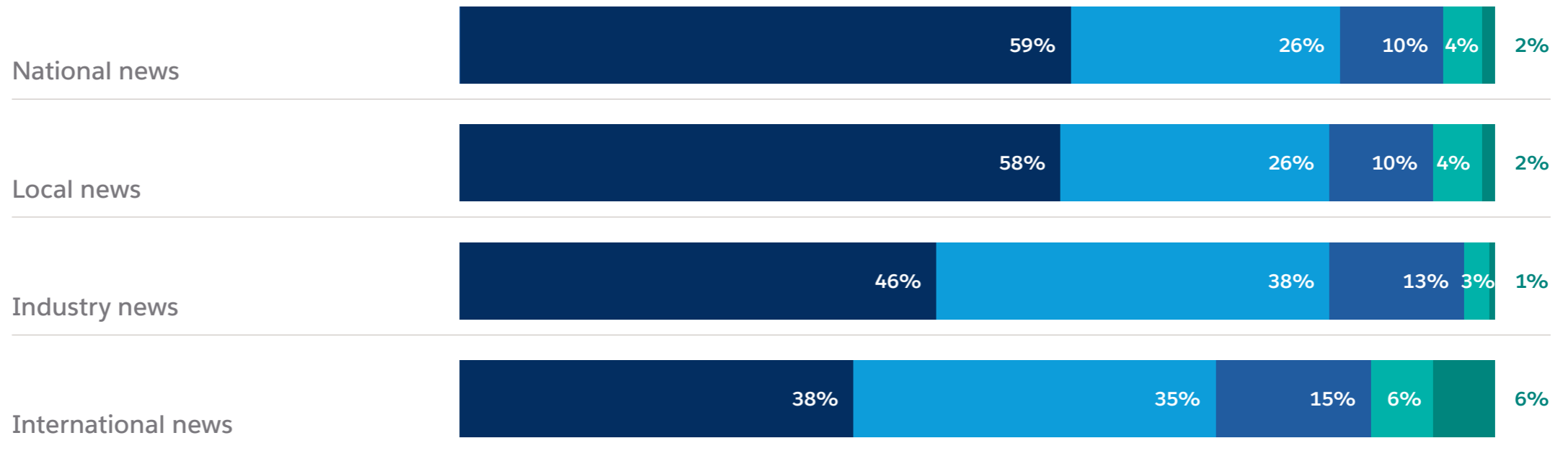
■ Sales leaders ■ Inside reps ■ Outside reps ■ Sales ops ■ Sales support



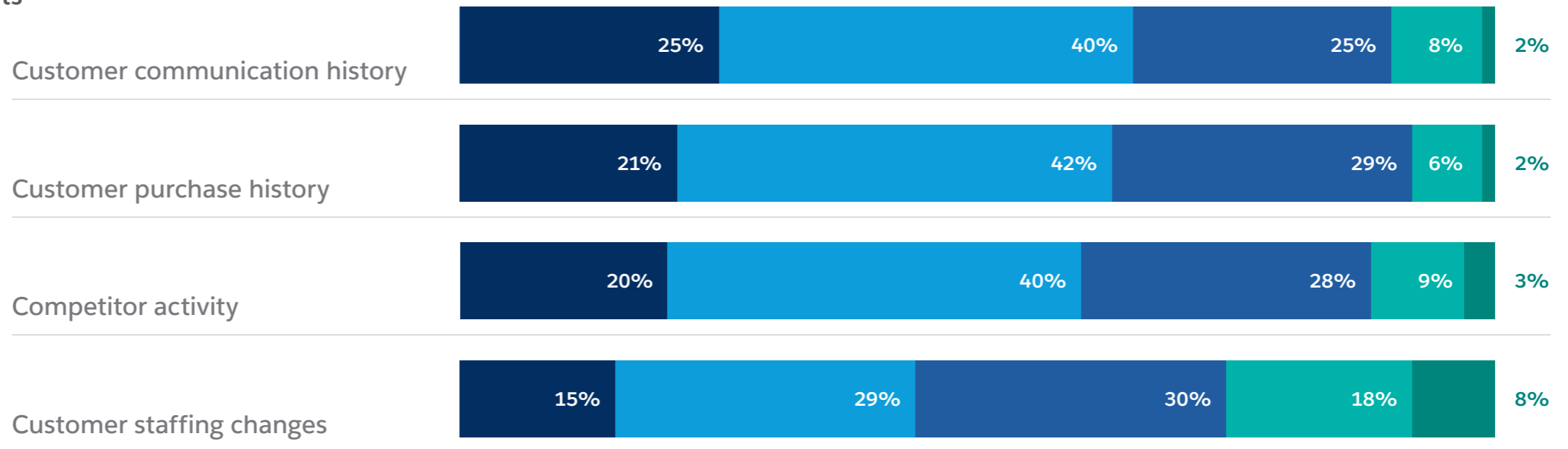
■ High performers ■ Moderate performers ■ Underperformers

Frequency with Which Reps Monitor Information Sources to Inform Their Selling

News

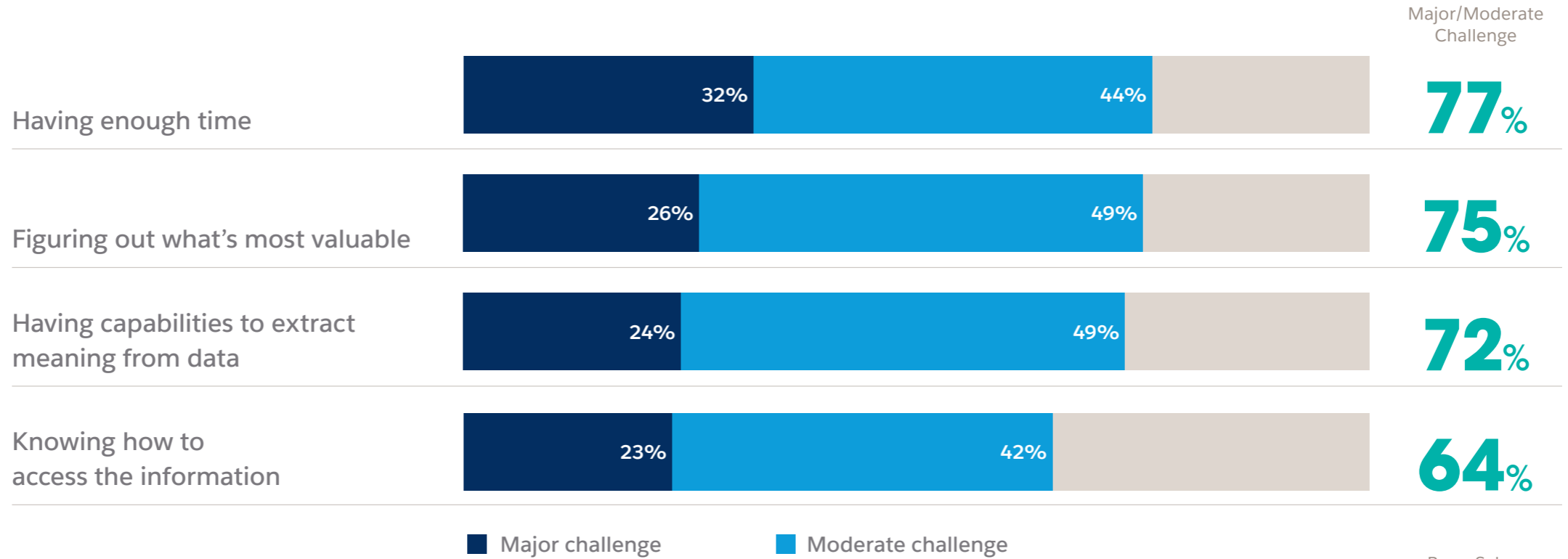


Insights



■ At least daily
 ■ At least weekly
 ■ At least monthly
 ■ Less than monthly
 ■ Never

Degree of Challenge Reps Face When Seeking Customer Insights



Major/Moderate Challenge

77%

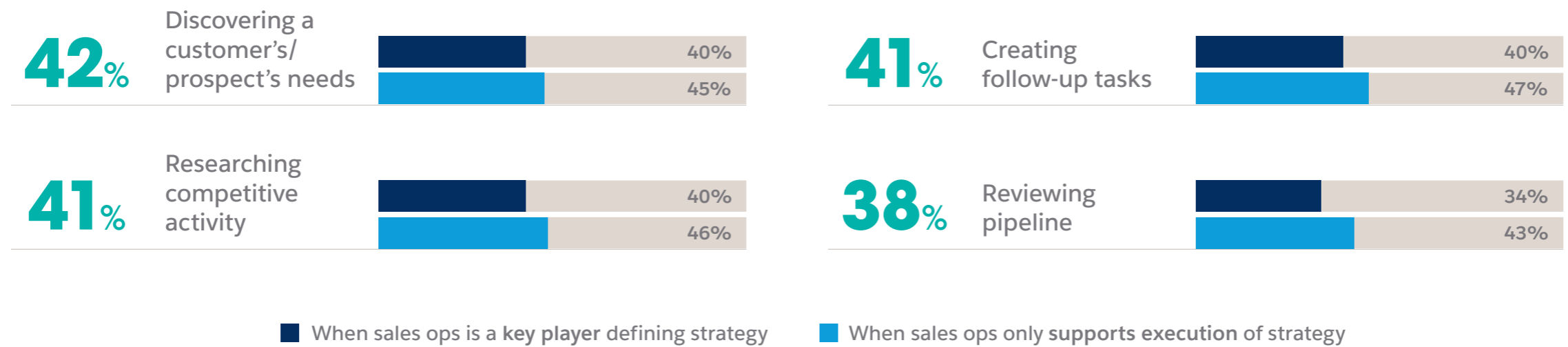
75%

72%

64%

Base: Sales reps.

Reps Who Say They Spend Too Much Time Doing the Following



42%

Discovering a customer's/prospect's needs

40%

45%

41%

Creating follow-up tasks

40%

47%

41%

Researching competitive activity

40%

46%

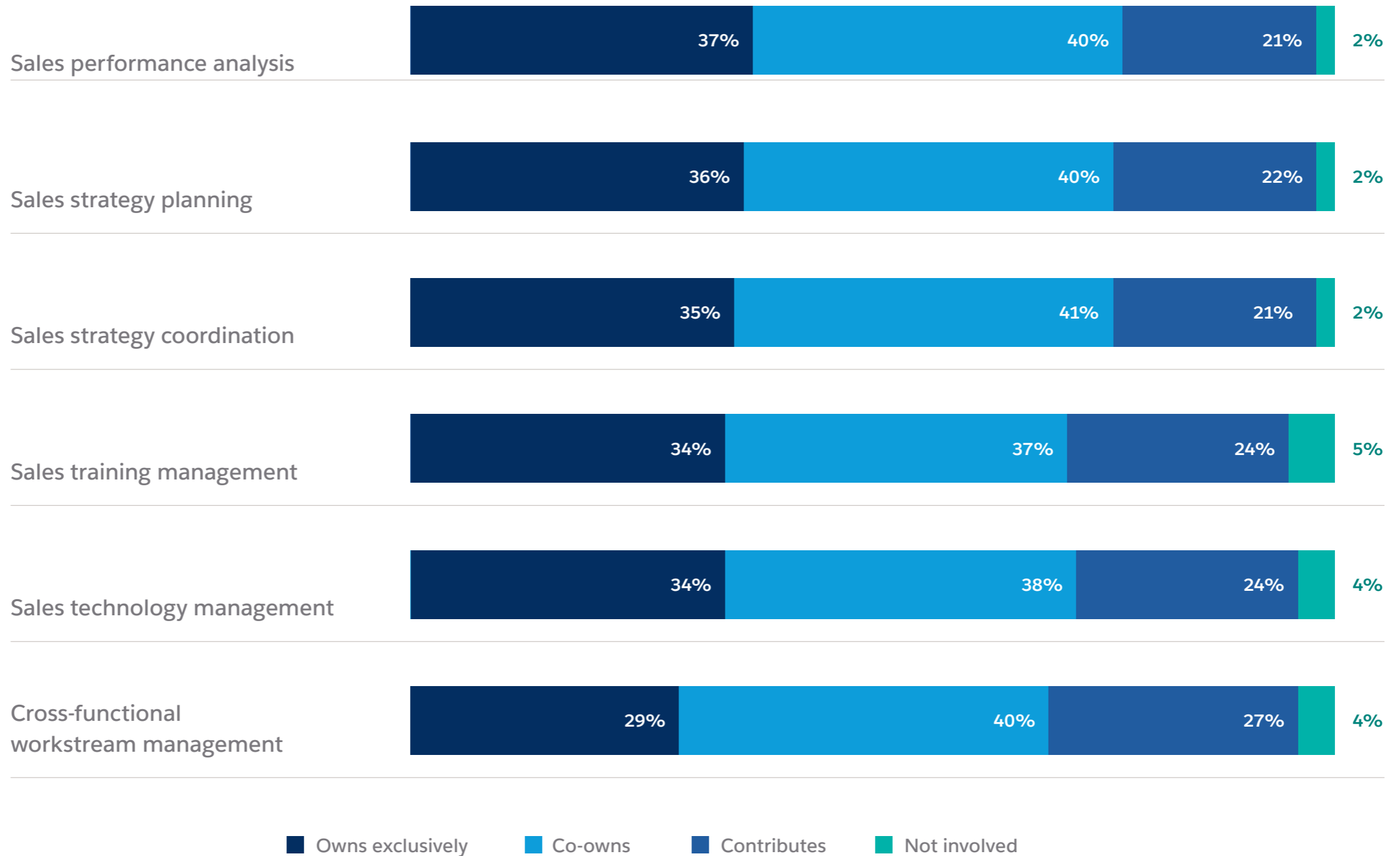
38%

Reviewing pipeline

34%

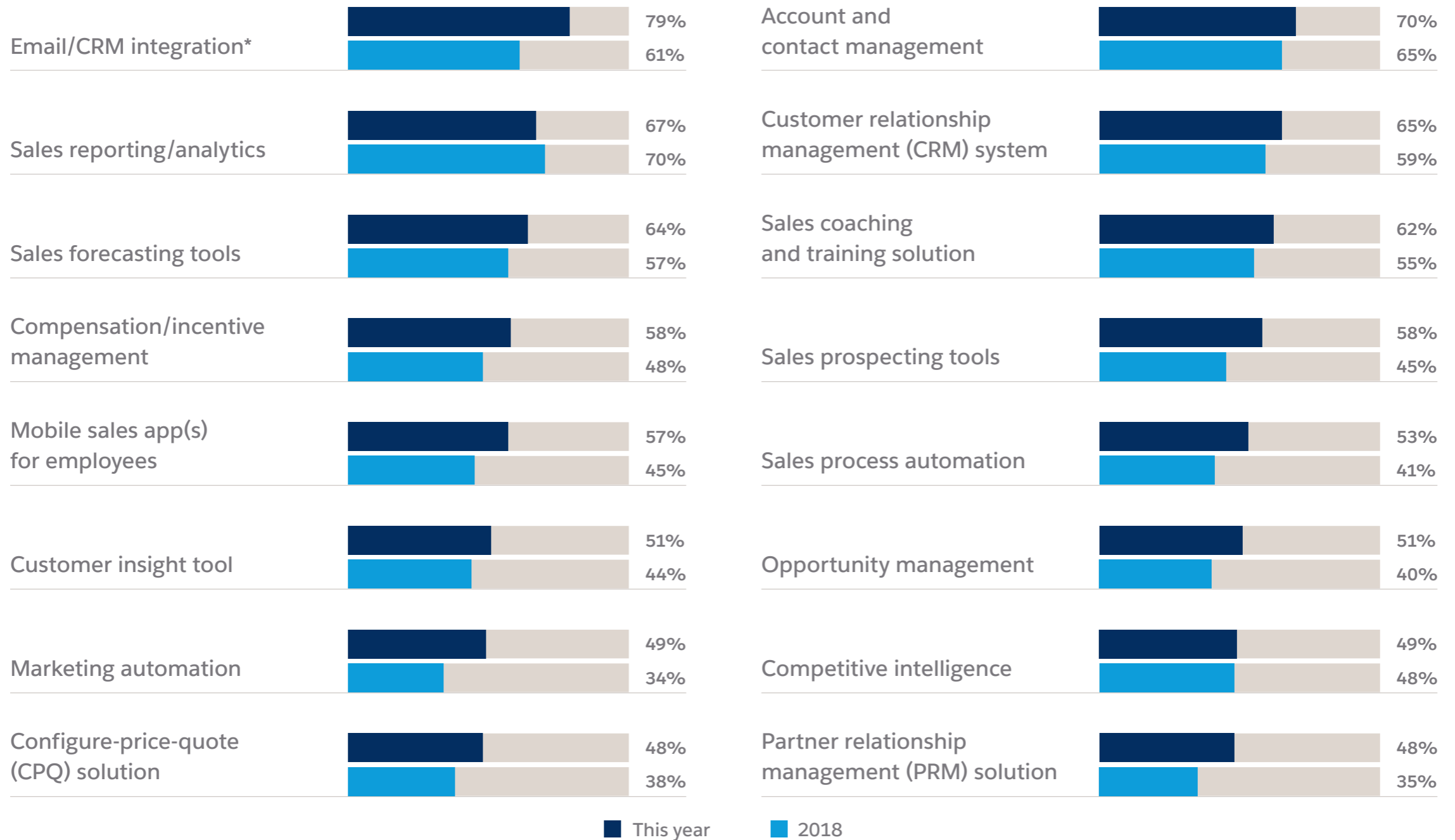
43%

Extent to Which Sales Ops Is Involved in the Following



Base: Company has sales operations.

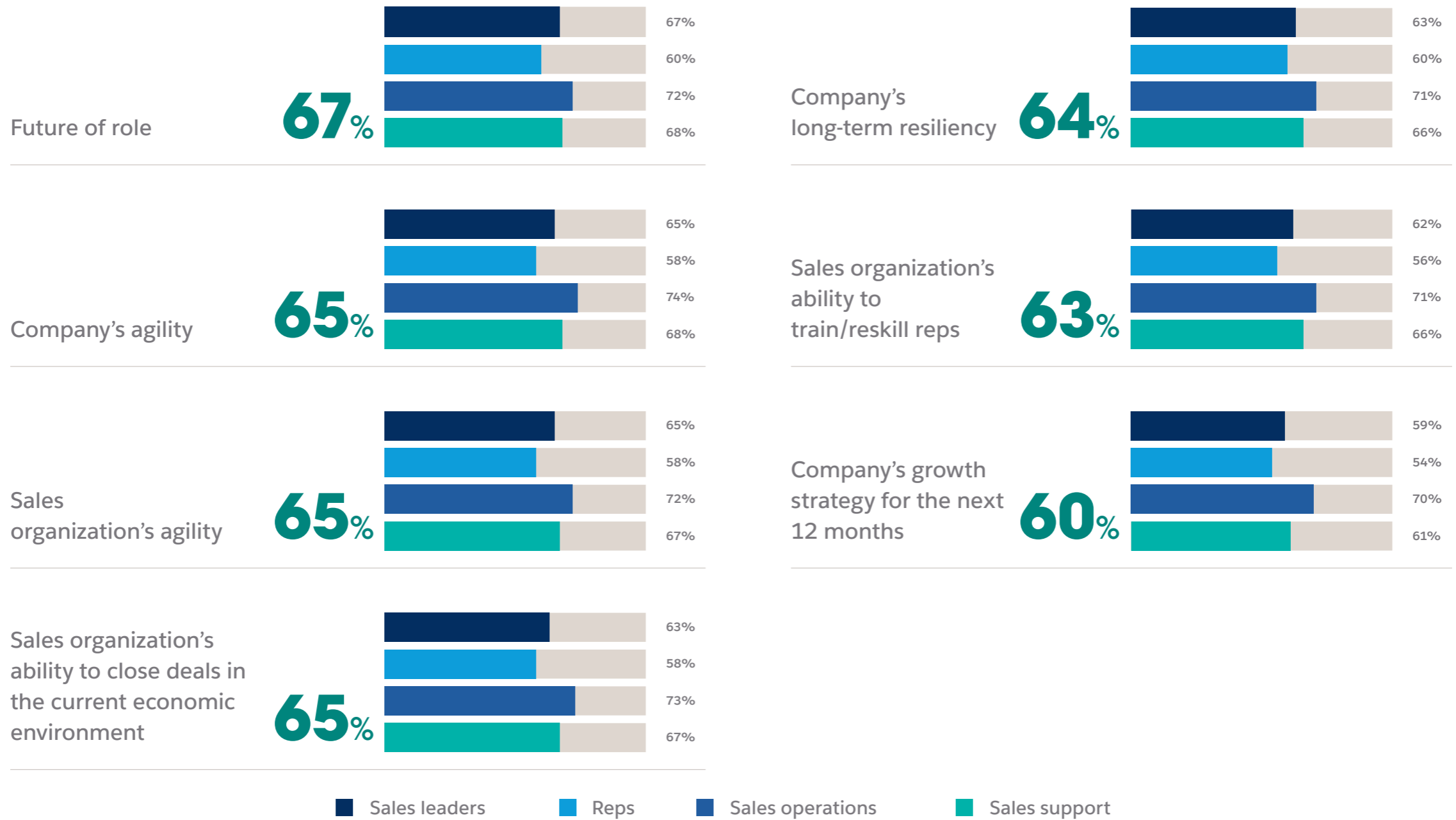
Sales Organizations Using the Following Tools



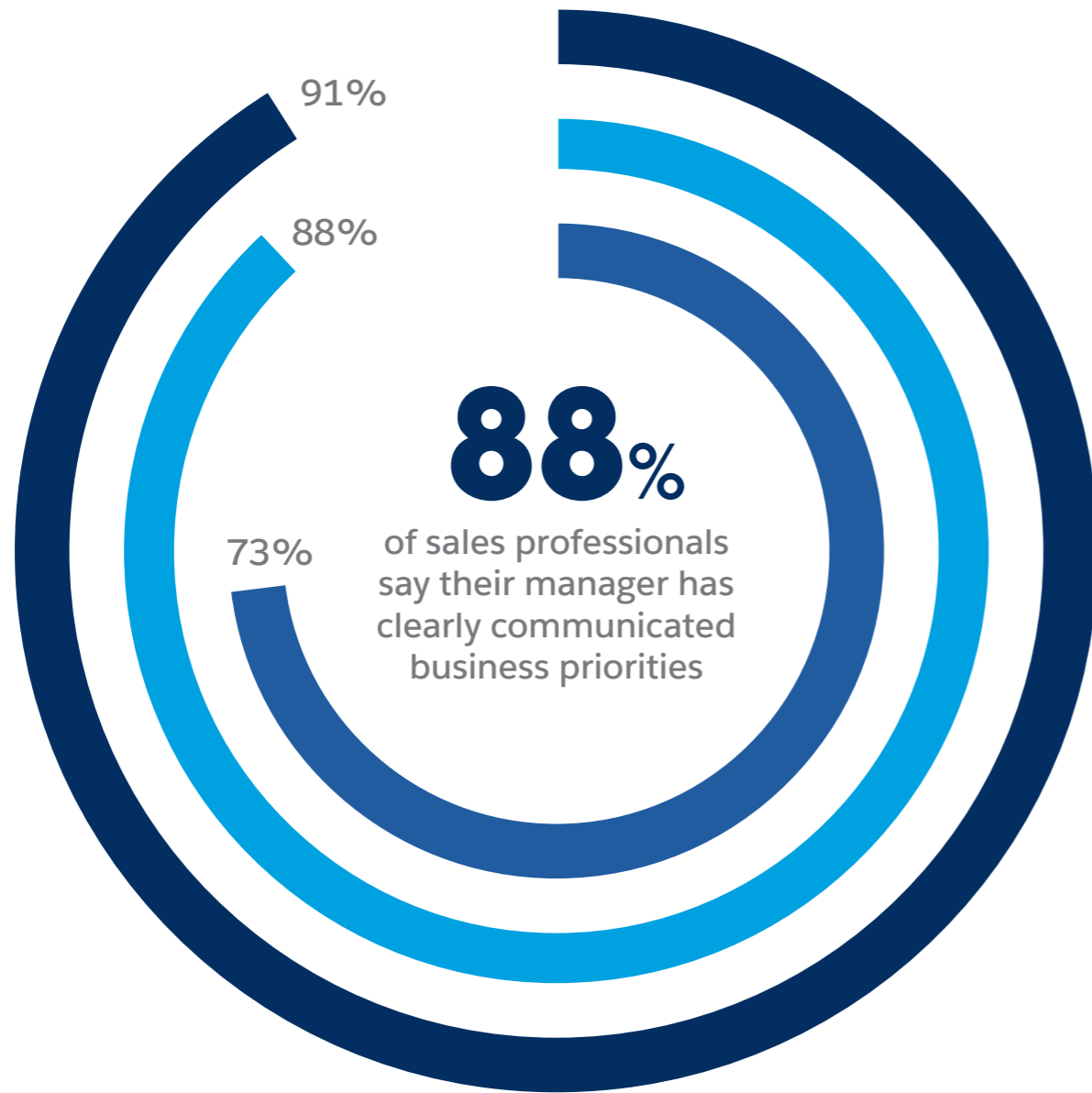
Base: Sales operations and sales leadership. 2018's "sales leadership" category has been modified to exclude C-level executives, to match this year's data.

*Base: Sales operations and sales leadership at companies that use a CRM.

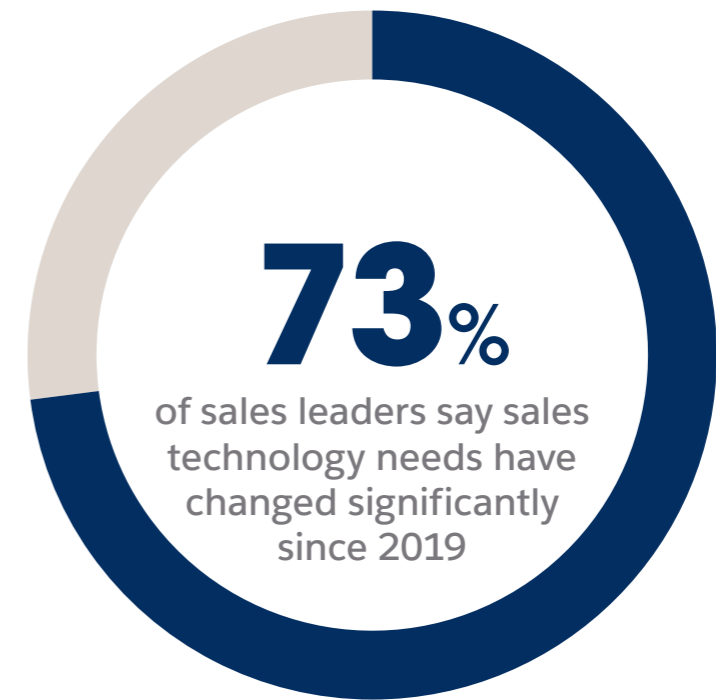
Sales Professionals Who Are Confident About the Following



Responses of "completely confident" or "mostly confident."



■ High performers ■ Moderate performers ■ Underperformers



Headcount Changes Since 2019 By Sales Organization AI Use

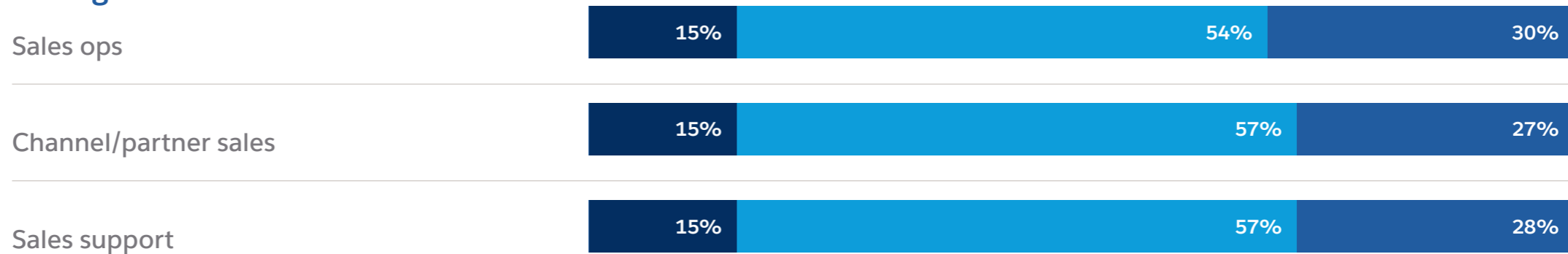
Using AI



Planning to Use AI



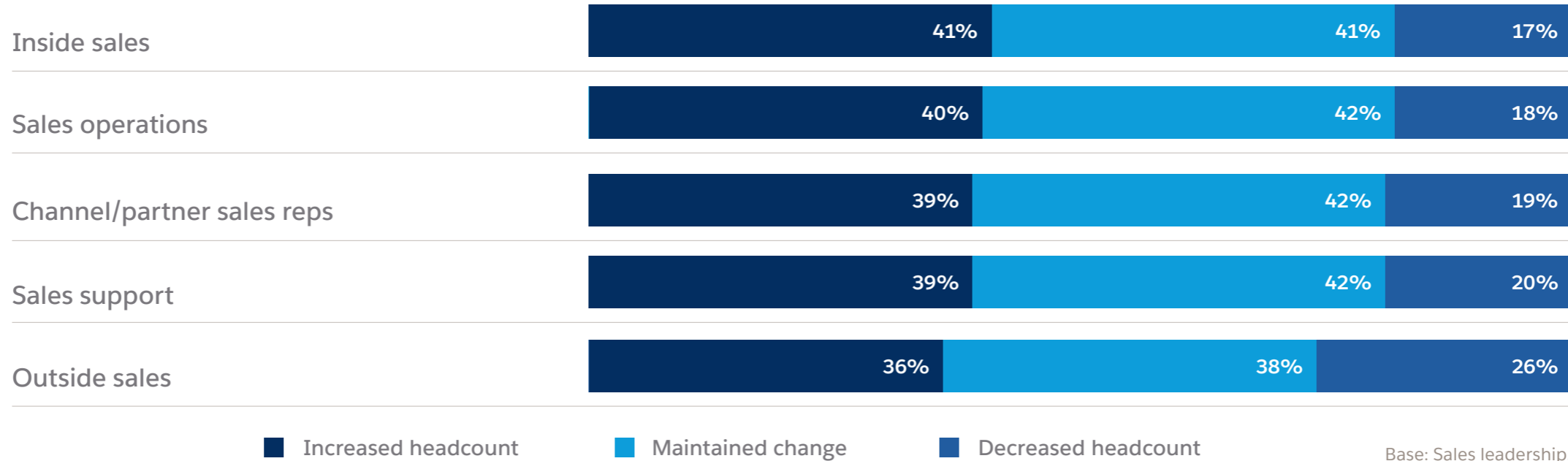
Not Planning to Use AI



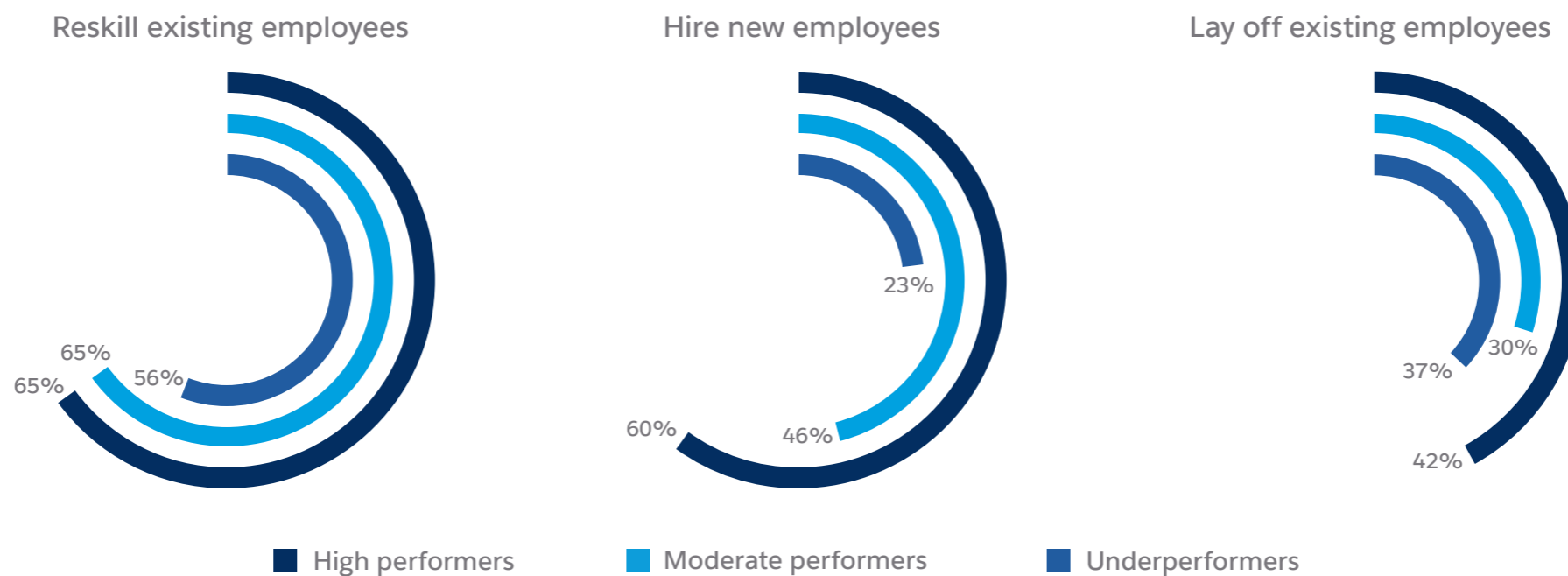
Increased headcount
 No change
 Decreased headcount

Base: Sales leadership at companies with sales ops, channel/partner sales, and sales support, respectively.

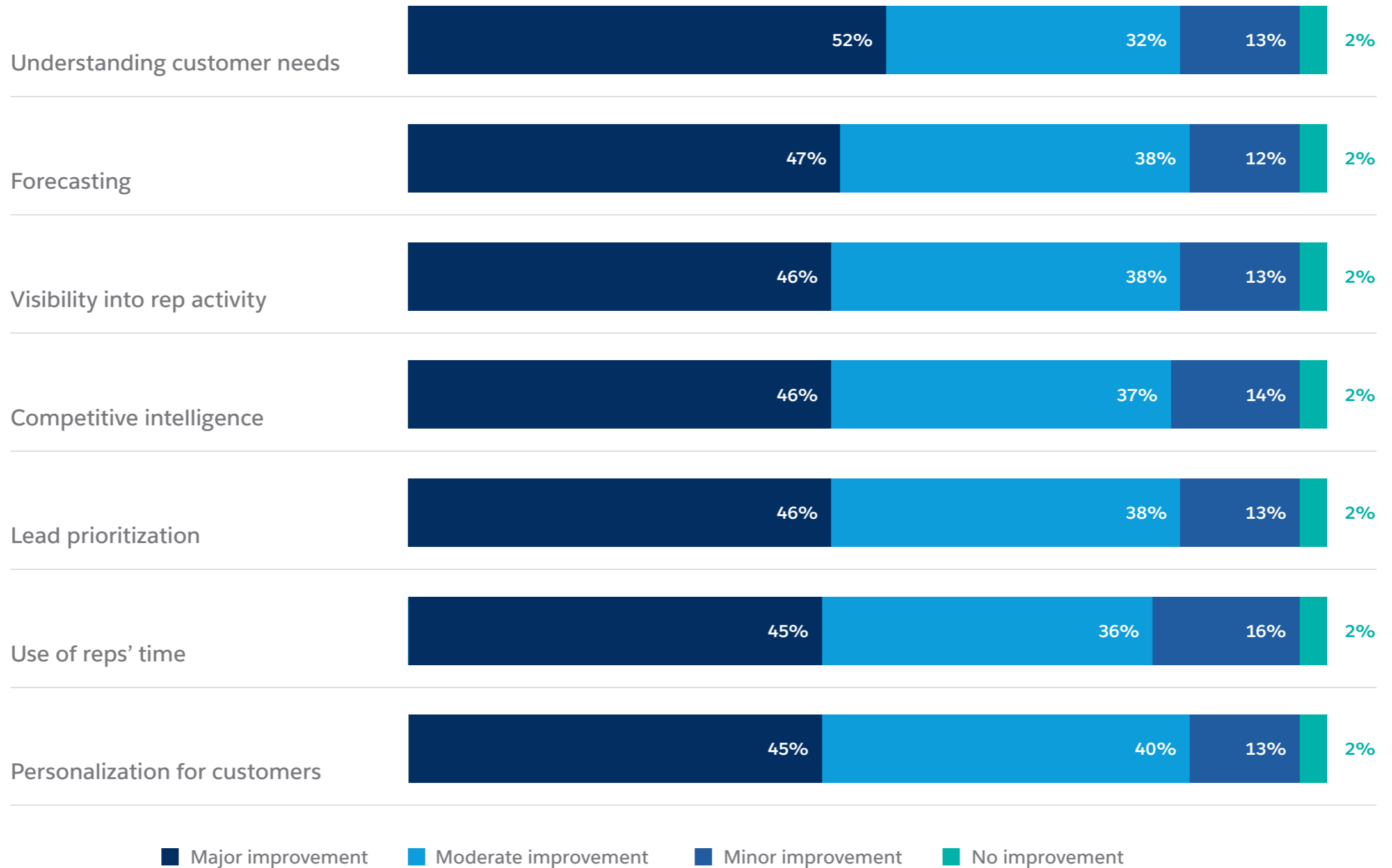
Changes in Headcount Across Sales Roles Since 2019



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

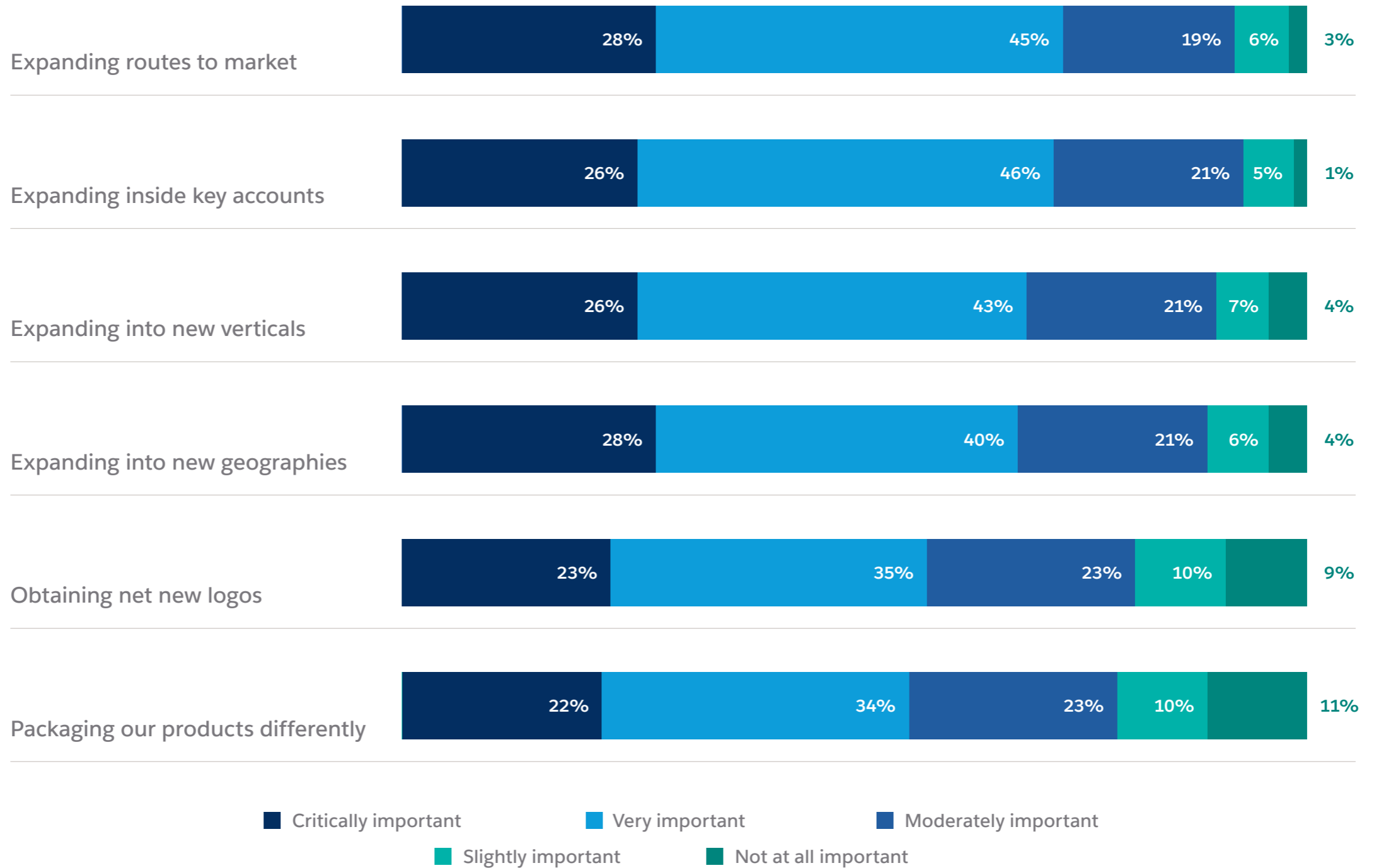


Degree of Improvement to the Following From Artificial Intelligence



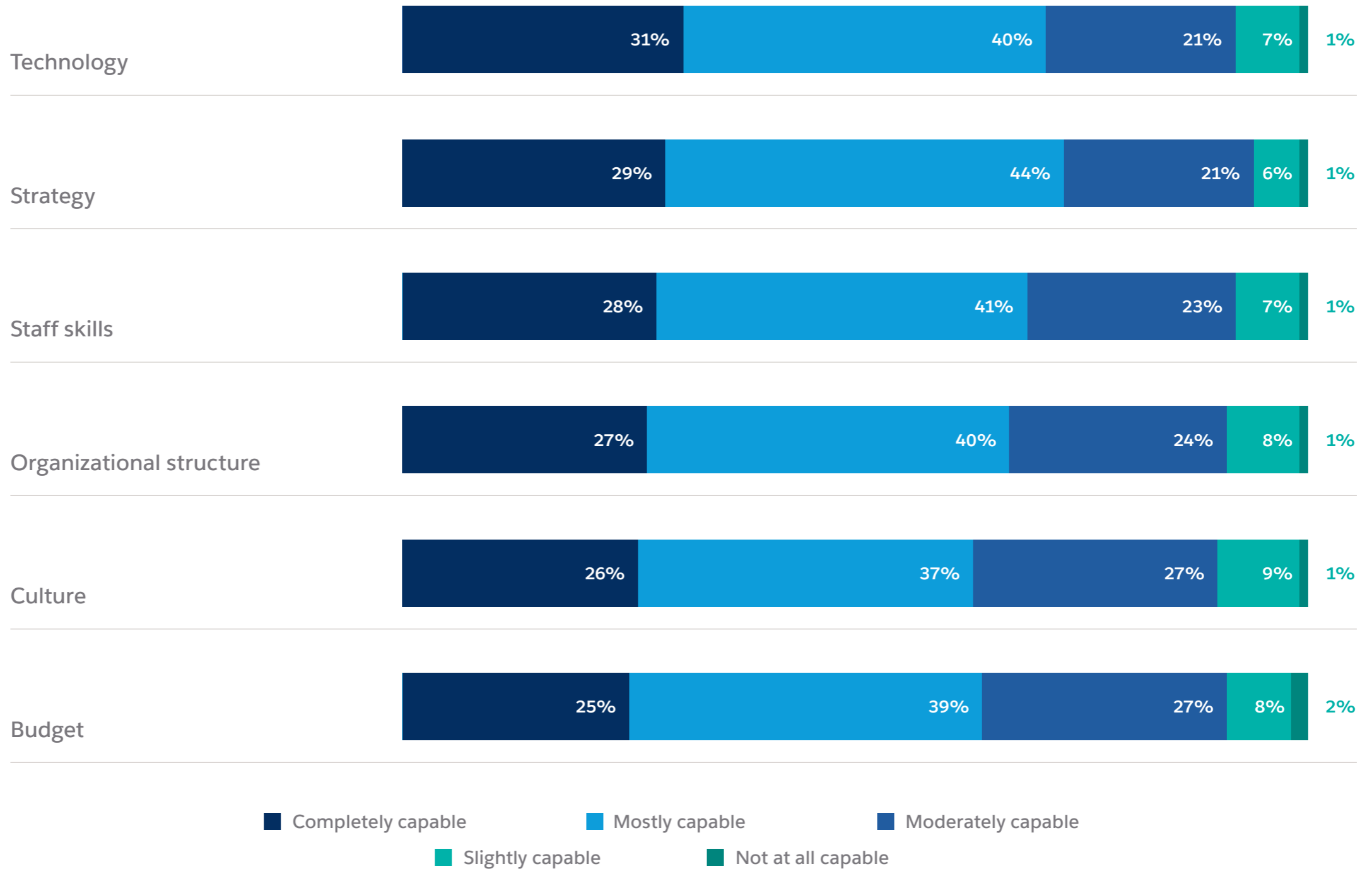
Base: Sales operations and sales leadership at companies using AI.

Importance of the Following to Driving Company Growth over Next 12 Months



Base: Sales leadership.

Capability of Sales Organizations to Adapt the Following to Change



Base: Sales leadership.

Sales Teams' Top-Ranked Tactics for Success over the Next 12 Months

	Sales Leaders	Outside Reps	Inside Reps	Sales Operations
1	Increased flexibility with customers	Increased flexibility with customers	Increased flexibility with customers	Increased flexibility with customers
2	Improved data quality and accessibility	Personalized outreach	Improved data quality and accessibility	Improved data quality and accessibility
3	Simplified sales processes	Simplified sales processes	Personalized outreach	Personalized outreach
4	Personalized outreach	Improved cross-functional partnerships	Simplified sales processes	Simplified sales processes
5	Improved cross-functional partnerships	Improved data quality and accessibility	Improved cross-functional partnerships	Improved cross-functional partnerships
6	Revised KPIs	Revised KPIs	Revised KPIs	Revised KPIs
7	Revised sales staff training	Revised sales staff training	Revised sales staff training	Revised sales staff training
8	Revised lead prioritization criteria	Revised lead prioritization criteria	Revised lead prioritization criteria	Revised sales cadence
9	Revised sales territories	Revised sales cadence	Revised sales cadence	Revised sales territories
10	Revised sales cadence	Revised sales territories	Revised sales territories	Revised lead prioritization criteria

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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