



Deloitte.
Digital

Experience Selling: The Future of B2B Sales

Five Steps to Transform and Deliver
the Right B2B Experience

November 2019

Executive Summary

B2B customer demands are changing, and these changes will likely persist

Customers are shifting from being product and solution-focused to seeking value-laden experiences from start to finish

- 75% of surveyed buyers are seeking input from peers and spending more time researchingⁱ
- Decision makers are inundated with data, and decisions impact many stakeholders
- New business models require end users to adopt solutions fast

Our research focused on how sales organizations are being impacted

We identified companies growing faster than their peers, but doing so at lower cost

- Leading companies are growing more than 3x the rate of Laggards (22% vs. 7%) while spending 50 percent less on sales (21% vs. 33%)ⁱⁱ
- Chief Revenue Officers surveyed indicated a significant gap between confidence in hitting plan (8/10) and more concrete signs of transformation and readiness (3.7/10)ⁱⁱ

Shifting to an experience mindset

Designing a B2B sales experience that delivers on customer demands requires addressing both the business and emotional needs of buyers, and delivers on three key elements:

1. **Personalization**, including tailored interactions and customized offerings
2. **Speed**, by delivering frictionless buying journeys and enabling self-service
3. **Outcomes**, from solving problems to delivering on promises to realize value

Leaders are reimagining interactions and operating differently

1. **Reimagining the buying journey** from the lens of customer experience (CX)
2. **Orchestrating selling motions** to deliver the right engagement and interactions
3. **Emphasizing the seller experience** both internally and for channel partners
4. **Doubling down on customer and sales analytics** to deliver intelligence to sellers
5. **Modernizing the Sales Operations function** to be strategic, agile, and analytical

The Path Forward – Where to get started?

1. Understand customer buying processes and internal and partner selling processes
2. Revisit operating models to bring marketing, sales, and service closer together along with strategy and execution
3. Evolve talent models to build more agile and data-driven to drive the transformation. This means changing profiles for existing roles, developing new roles, and recruiting more tech and data-savvy talent

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Introduction



Introduction

With the Fourth Industrial Revolution well underway, we've seen rapid innovation fundamentally change the large enterprise. From modernized product development and supply chains to digitalized human resources and new ways of communicating and sharing information, disruption has engulfed most business functions. Relative to these functions, large B2B Sales Organizations have been slow to change.

They continue to rely on many traditional sales strategies and face many age-old operational challenges. Sales tactics may be changing slowly, but preferences, behaviors, and expectations of B2B customers are changing rapidly.

Increasingly, **B2B buyers are being influenced by their experiences** as consumers outside of work. This is coupled with an increasingly complex business reality. Business problems often are now technology problems, decision makers are inundated with data, and these decisions impact a greater number of business functions and stakeholders. These influences have resulted in them valuing experiences over products and solutions and are shaping what they buy and how they buy it. The B2B buyer is shifting from buying products and solutions to buying experiences that generate value from the first interaction to long after the order is placed.

Exhibit 1: What Customers Buy is Changing...



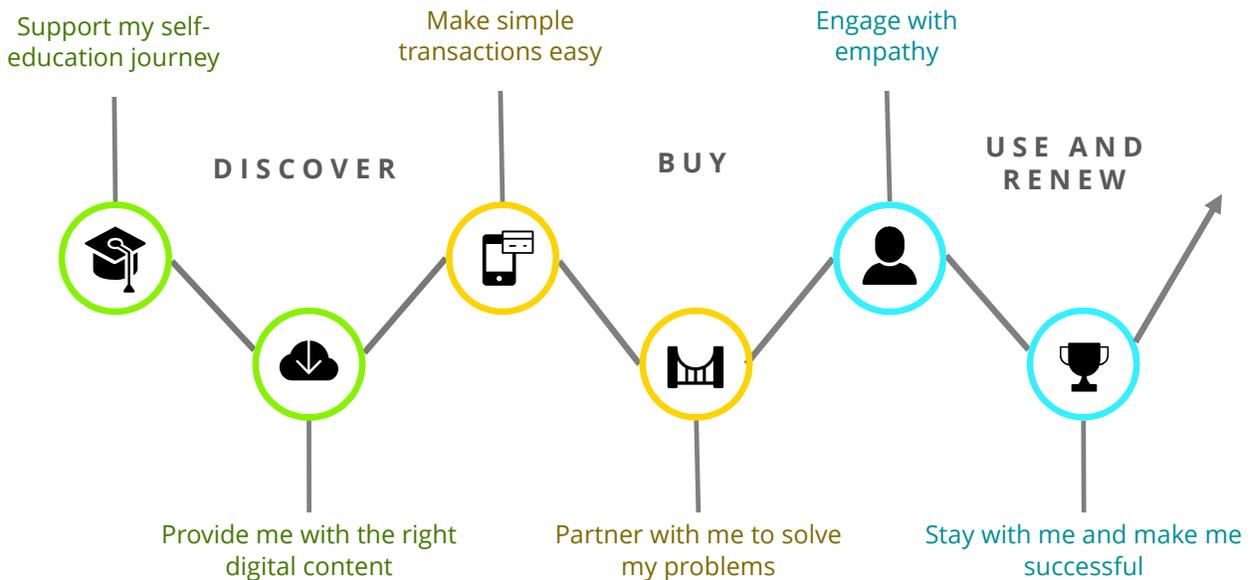
Source: Deloitte

Deloitte recently conducted a research study to examine how Experience Buying is impacting Sales. The study explored what experiences customers expect, how sales organizations are being impacted, and how sales leaders are responding. The research yielded insights into the key characteristics of B2B experiences customers are demanding as well as what sales organizations are doing to respond.

Our research shows B2B customers seek experiences that deliver:

1. **Personalization**, providing tailored interactions and offerings
2. **Speed**, delivering frictionless buying and enabling self-service
3. **Outcomes**, solving problems and delivering on promises to realize value

Exhibit 2: How Customers Buy is Changing...



Source: Deloitte



Our research further found most B2B sales organizations are not positioned today to compete on experience. However, there are some organizations making successful changes. These winning sales organizations are transforming to deliver better experiences in five ways:

1. **Reimagining the buying journey** from the lens of customer experience (CX), focusing on moments that matter
2. **Orchestrating selling motions** which utilize both digital and optimal customer-facing roles to deliver the right engagement and interactions
3. **Emphasizing the seller experience** both internally and for channel partners
4. **Doubling down on customer and sales analytics** to deliver prescriptive intelligence to sellers
5. **Modernizing the Sales Operations function** to be more strategic, agile, and analytical

This paper explores the three elements of the B2B experience, and the five steps sales organizations are taking to achieve it in more detail, with the aim of helping today's Chief Revenue Officers and Sales Strategy and Operations Leaders transform their organizations based on an outside-in perspective to address changing customer demands.

We also share the tactical steps commercial leaders are taking to approach the transformation and include specific examples for how leaders are understanding their customers, sales, and partner journeys at a deeper level, transforming their operating models, evolving their sales and operations talent, and building an agile and data-driven sales culture.

B2B customer demands are changing, and these changes will likely persist

What's behind this shift for the business customer?

The preferences, behaviors, and expectations of B2B customers are changing rapidly. The business customer is heavily influenced by their experiences as consumers. B2C has led the way with mobile, omnichannel, data access, peer reviews, and on-demand support. These consumers, many of whom are younger professionals, now seek the same experiences in their business interactions. Three quarters of B2B buyers in one survey said they are spending more time researching purchases. Nearly all said vendor websites must have relevant, easy to access content, with more than half saying it was very important. Nearly three quarters said they sought input from peers and existing users within the first three months of their buying process.ⁱ

To complicate matters, business problems are now technology problems, and the solution

choices can be overwhelming. Customers seek confidence and security to make the right buying decision—and quickly. In addition, decision makers are inundated with data, and these decisions impact a greater number of business functions and stakeholders because enterprises are more connected than ever, with most decisions impacting many others.

New business models (e.g., subscription, flexible consumption, XaaS) and the prevalence of connected platforms and ecosystems require end users to adopt selected solutions fast, leaving little time for trial-and-error.

These influences are shaping what B2B customers buy and how they buy it. The B2B customer is making buying decisions based on their end-to-end experience -- an experience they expect will generate value from the first interaction to long after the order is placed.

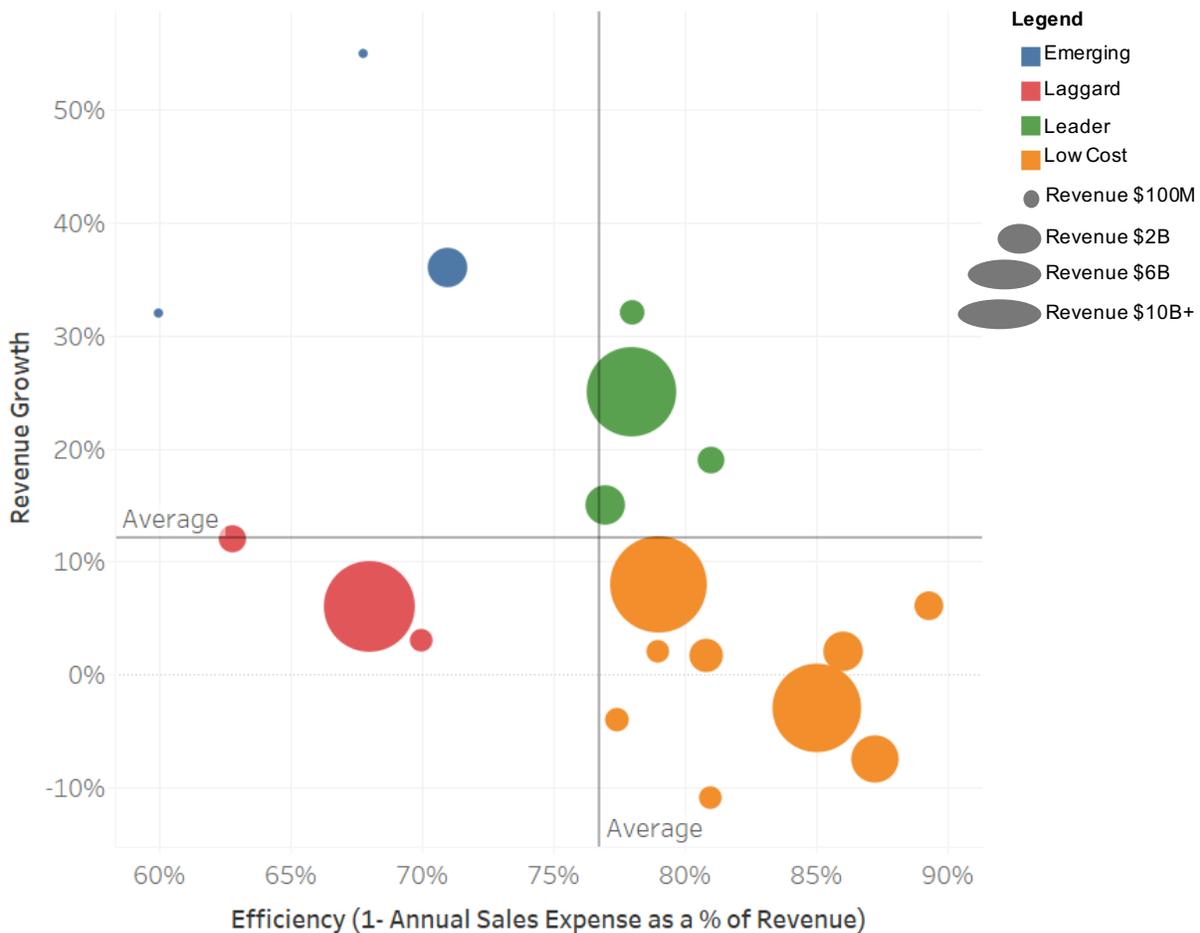
Our research was both wide-ranging and deep

The 2019 research study integrated data from over 100 sales transformation engagements across industries and from primary research with dozens of leading companies across industries, including enterprise hardware and software, asset management and insurance, manufacturers, distributors, and value-added solution providers. We collected and analyzed sales and performance data and conducted one on one and group interviews with more than 50 Chief Revenue Officers and Heads of Sales Operations.

To isolate the actions generating results, we identified high performing sales organizations relative to their peers using the Deloitte Sales Leader/Laggard Framework which focuses on revenue growth within an industry subsector and efficiency (1 - sales expenditure as a percentage of revenue). This identified companies that were not only growing faster than their peers but doing so at lower cost. While growth is admirable, profitable growth is more admirable. The Leading companies are growing more than 3x the rate of Laggards (22% vs. 7%) while spending 50 percent less on sales (21% vs. 33%).ⁱⁱ

While there are many factors driving growth, patterns emerged of tangible actions leading B2B companies were taking to improve experiences for their customers.

Exhibit 3: Revenue Growth vs. Efficiency



Source: Deloitte Digital's Future of B2B Sales Study, Deloitte Digital Analysis

- **Market leaders** are those with above average efficiency (1- Annual Sales Expense as a % of Revenue) and positive revenue growth
- **Emerging companies** have positive revenue growth, but at higher costs
- **Low Cost organizations** may not be growing top line, but also have below average cost structure
- **Market Laggards** are those with below average efficiency and negative revenue growth

Except where otherwise noted, all statistics mentioned in this report derive from the results of this study. These findings reinforce some of the changes most sales organizations are making, while challenging other long-held sales beliefs.



Shifting to an experience mindset

Customers are shifting from being product and solution-focused to seeking value-laden experiences from start to finish – from identifying a problem, learning about solution options, to choosing a configuration and vendor, making the purchase, and finally using and realizing value. They want interactions personalized to their needs – with simple transactions made easy through digital channels, and larger, more complex purchases from companies that treat them as partners more than vendors – helping them clarify ambiguous problems and demonstrating trustworthiness.

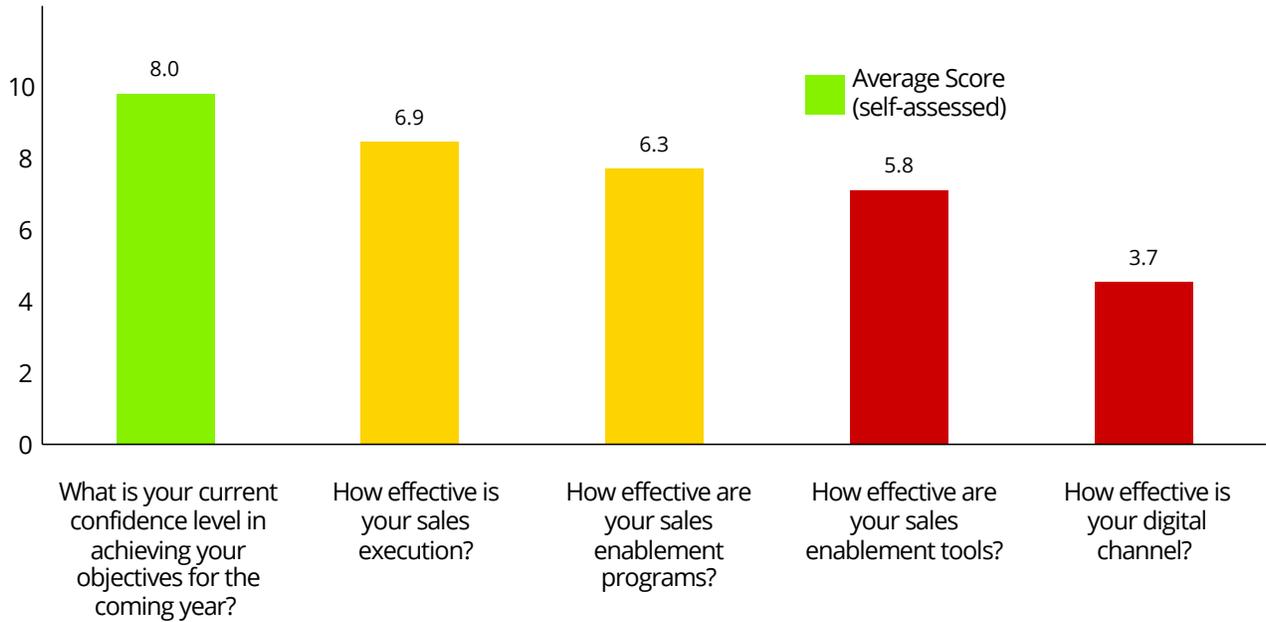
Furthermore, the shift to an experience mindset doesn't just involve the customer. Today's revenue leader must also design and execute with the experience of the sales person and the channel partner in mind.

Many B2B sales organizations are not positioned today to compete on experience and outcomes or structured to optimize the sales representative or channel partner's experience. Sales roles and processes are

designed around products and solution offerings rather than buyer behavior. Disparate tools and technologies map to business line and internal functional constructs versus client needs and preferences. According to our research, the typical sales person deals with approximately ten unique tools in their role. These tools address capabilities ranging across lead and opportunity management, product and marketing content, configuration and quoting, compensation, and reporting platforms. In addition, they must interface with different sales, Sales Operations, finance, and services delivery teams to obtain information necessary to react to customer demands.

Our interviews with over 35 Chief Revenue Officers indicate a significant gap between general confidence in hitting plan and more concrete signs of transformation and readiness. As customers increasingly demand better experiences, traditional sales methods will be challenged, and sales enablement and digital channels will become increasingly important in driving results.

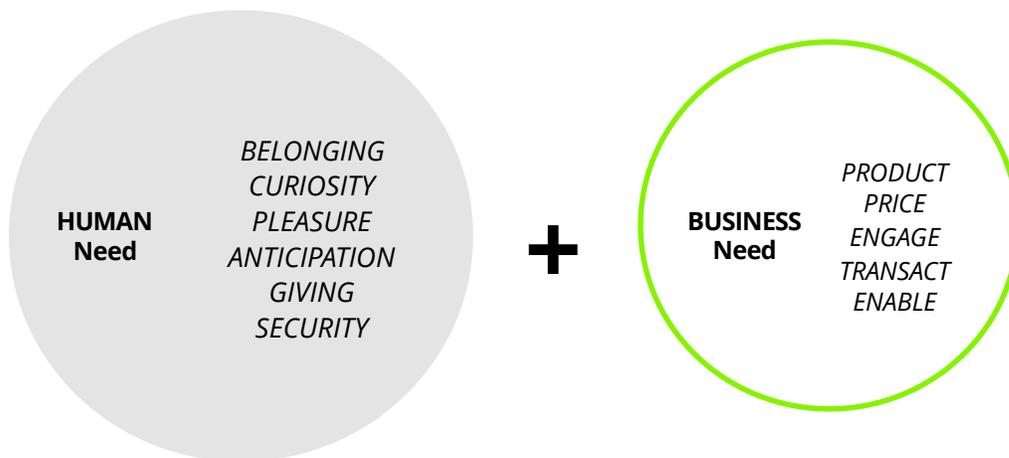
Exhibit 4: Sales Leader Confidence Level Survey Results



Source: Deloitte Digital's Future of B2B Sales Study

However, deploying more tools or introducing the next enablement program will not solve the problem on its own. Designing a B2B sales experience that delivers on customer demands requires addressing both the rational business and human emotional needs of buyers and has real implications for sales leadership.

Exhibit 5: The Human Experience of B2B Sales



Source: Deloitte

Our research showed that B2B customers are asking their vendors and partners to deliver three key elements of an end-to-end B2B sales experience:

1. **Personalization**, including tailored interactions that help buyers navigate their complicated internal processes and customized offerings based on their specific needs and desires.

Business buyers expect companies to understand them, anticipate their needs, and make relevant suggestions. They want offerings that incorporate feedback and iterate with changing needs.

In addition to personalized offers, B2B buyers require interactions that offer the right level of engagement across the buying journey through a combination of human and digital channels that work together. Both buyers and the customers' end-users should be left with a positive impression after each interaction. Sellers need to consider how their customer-facing digital tools and internal sales processes deliver on this demand.

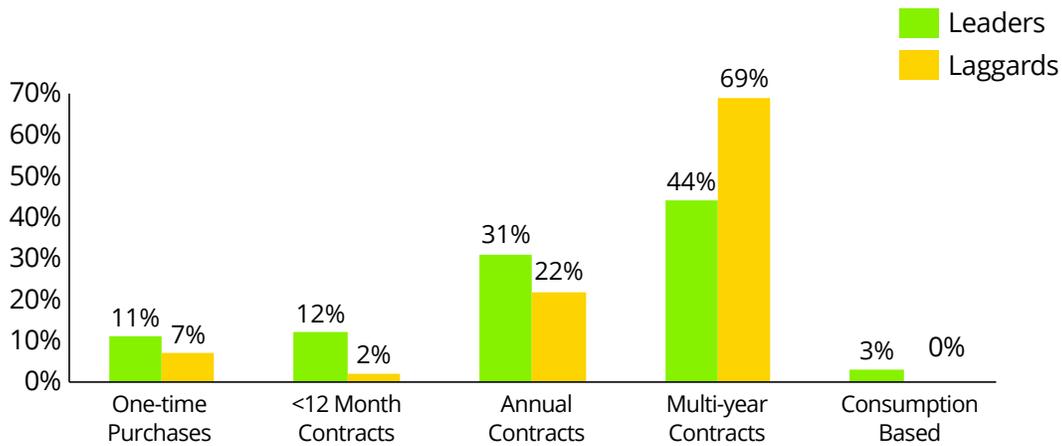
The challenge with personalization is delivering it efficiently at scale. Leading organizations are using automation and predictive data science to direct personalized outreach campaigns as well as next best actions. According to our research, nearly all B2B organizations are tailoring web and other marketing content in some way, with more than half tailoring content to individual buyer profiles (e.g., IT buyer, CFO). The degree of content personalization is increasing as organizations improve B2B customer analytics. They are also increasing job specialization and collaboration across roles to bring the right expertise forward at the right time. Finally, they are utilizing sophisticated configure, price and quote (CPQ) solutions as well as offering a wider range of contracting terms from fixed multi-year to usage-based flex consumption models in order to personalize around the customer.

One international logistics company addressed the personalization challenge by using innovation centers, which bring customers together with their supply chain partners to share ideas and create unique solutions together.ⁱⁱⁱ

Other organizations are leveraging social analytics to identify buyer intent, such as job listings, promotions, new hires that may signal a buyer is actively seeking to transform – allowing marketing and sales teams to target their messaging

Market Leaders in enterprise software have revenue streams from a wider range of contract types relative to laggards.ⁱⁱ This is likely due to leaders offering more flexibility in the form of month-to-month and annual options, enabling them to capture segments of the market looking for more flexible pricing arrangements. Laggards reluctant to move off long-term maintenance/support contracts may be losing out on customers. While flexible consumption remains a relatively unexplored territory for pricing across most B2B, Market Leaders show more signs of exploring this approach.ⁱⁱ

Exhibit 6: Bookings by Contract Types



Source: Deloitte Digital's Future of B2B Sales Study, B2B Software Companies

2. **Speed**, by delivering frictionless buying journeys and enabling self-service.

A cornerstone of a good buying experience is one that makes the process easier – and in B2B, this requirement takes on more meaning due to the complicated, non-linear internal processes B2B buyers have to contend with. They must navigate their organizations policies, various stakeholders, and unclear budgeting and procurement processes. They expect sellers to remove friction from the process by enabling their self-education journeys through relevant and easy to access online content that helps them manage their internal stakeholders. They want to receive quotes faster and be able to manage contracting and ordering online. They want simpler B2B transactions to be managed through eCommerce and want a single point of contact when they need human interaction. Our research shows that three out of four B2B customers are more likely to recommend a vendor with a simpler process.

One sales organization achieved this by creating personalized B2B stores enabling their customers' end-users to make purchases directly with modern eCommerce experiences such as AI-driven recommendations. This gave buyers the flexibility to purchase from a customized catalog without having to interact with a sales rep.

Another organization improved the volume and quality of marketing and product content it makes available to B2B customers for its solutions aimed at large enterprises. By reducing the amount of gated content, they make it easier for buyers to learn about their solution. A leading cloud services provider takes a similar approach with their case studies, providing them ungated and with considerable detail including video testimonials.

3. **Outcomes**, from solving problems through partnership to delivering on promises to realize value.

Buyers want to feel secure that they made the right buying decision and see value created each step of the way, from identifying root causes of problems to understanding how they will implement and adopt successfully. Buyers are increasingly being held accountable by their organizations for delivering better experiences to their customers and their employees as an outcome of the buying decisions. As a result, sellers must help their buyers create and deliver end-user experiences that drive adoption and value. This means staying engaged well beyond the sale. Sellers are expected to shift to be unwaveringly customer-centric – it's not enough for a seller to stand behind their product, they need to become integral partners in ensuring the customer's success and the buyer's individual success. New skills are needed to design and create solutions across multiple vendors, functions, processes, and technologies, while delivering on promises and building trust.

One IT value-added solution provider we spoke to said there needs to be much more multi-vendor solution co-creation across the vertical value chain to deliver what customers really want – better ways of helping their employees collaborate and stay productive at costs that are variable based on usage.

This might require contract terms that are aligned to customer outcomes or greater investments in post-sales customer success and enablement. For example, B2B customers are increasingly asking for a portion of fees to be contingent upon specific outcomes after installation and execution of the solution.

Cloud companies have historically invested in a customer success function, professional service organizations, and third-party partnerships to help their customers implement their solutions, find ways to reduce costs, and ensure value is created through end user adoption. Other sectors are now adopting this approach.

Organizations should track success metrics for customers and consider how their performance management programs promote the right behaviors.

A leading cloud services provider has been transforming its sales organization to be more outcomes-focused. They have shifted away from bookings/revenue as their primary sales metric to product usage and consumption-based metrics that focus on how the service is being adopted. The CFO of another leading B2B company we spoke to is considering the same approach for their organization.

Winning sales organizations are reimagining interactions and operating differently

Sales organizations focusing on personalization, speed and outcomes in their commercial workflows are poised to gain market share. Our research found that leading sales organizations are reimagining interactions and operating differently to create differentiated experiences. It starts by understanding the customer and their buying process more deeply to design the right buying experiences. Secondly, delivering those experiences will require new and changed selling motions across the end-to-end journey, not narrowly focusing sales efforts on the opportunity-to-order process, including better use of digital B2B channels.

These organizations are then improving the experiences of the sales rep and partners to enable them to deliver better customer buying experiences. This new seller experience is increasingly insight driven, meaning it is fueled by data and analytics that arm sales with actionable insights at the right moment of each step of the selling process. Finally, sales organizations are evolving their siloed support functions to enable a Sales Operations function that brings together strategy, operations, data, analytics, and technology.

Exhibit 7: Five Steps to Deliver Better B2B Sales Experiences



Source: Deloitte

A deeper look at these five steps emphasizes what leading sales organizations are doing to transform and improve interactions and experiences.



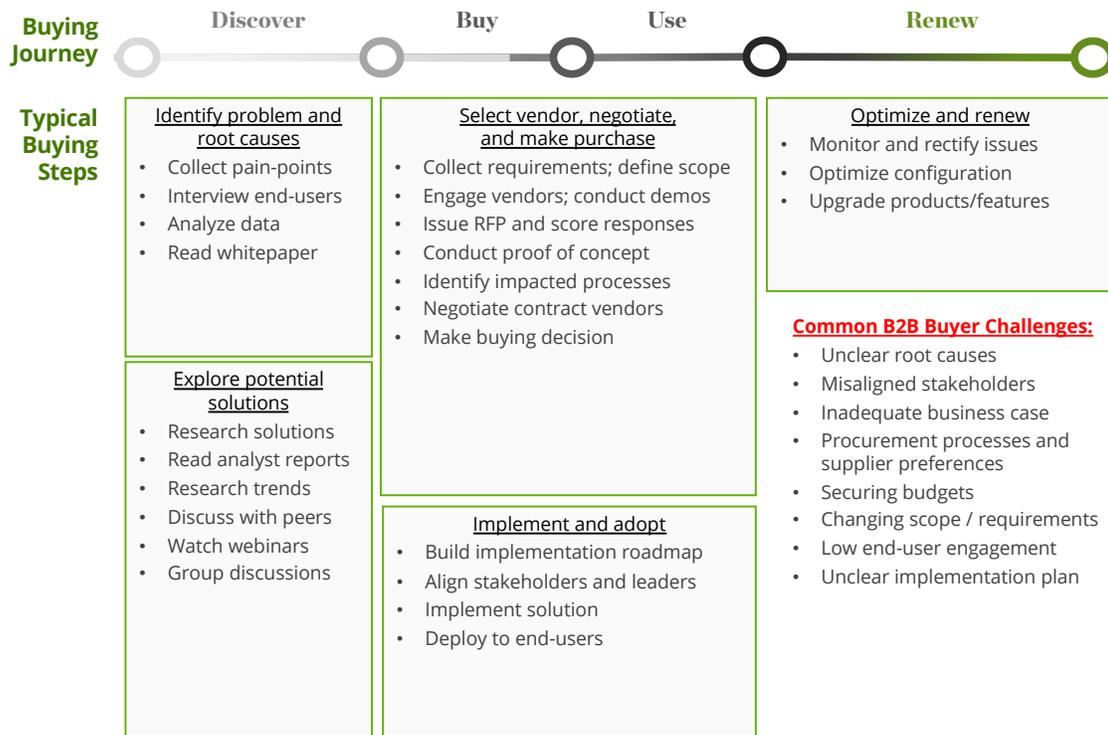
1. Reimagining the customer buying journey, informed by a deep understanding of customer preferences and demand patterns

The starting point for sales organizations successfully making this transition starts with identifying the right customers to target, understanding their unique buying processes, and then designing personalized experiences that make those efforts easier to navigate.

Predictive data science models are being used with a variety of firmographic, economic, historical, and behavioral data to identify the greatest opportunities and segment them based on buying pattern characteristics rather than size and geography.

From there, sales organizations are employing new human-centric design methods, such as ethnographic research, to better understand their customers and their real-life buying processes. This requires engaging a representative set of customers through customer advisory councils and partnering with them to better understand their internal mechanics. The buying experience should be documented not only as steps of a journey, but as a narrative that describes the key elements of the experience and the impression that should be left after critical moments that matter. This is helping sales organizations identify the specific changes that must be made to enable these experience moments.

Exhibit 8: Typical B2B Buying Steps



Sources: Deloitte, Brent Adamson, "Win More B2B Sales Deals, Gartner, 2018.



2. Engaging with newly deployed selling motions aligned to the buyer experience, including activating new digital channels

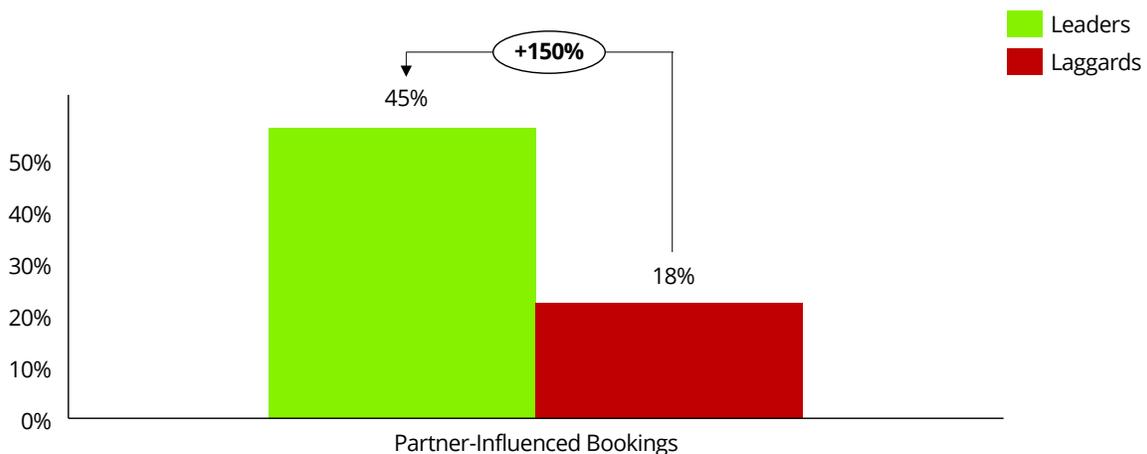
Once the buying experience is understood, a unique and personalized selling process is required for each unique customer buying process, focusing on the critical experience moments.

Sales leaders are focusing on personalization. A company shopping centrally for complex solutions will require different interactions than a large company that is buying simpler products in each local office. In each case, the key buying steps must be orchestrated to create a desired end-to-end experience.

Historically, B2B sales organizations have often focused incremental resource investments on hiring more high-cost field sales reps and implementing tools such as CRM to gain better visibility to the pipeline. Sales organizations are now fundamentally changing their approach to their sales investments to build the right mix of roles, digital capabilities, and partnerships that align to these redesigned selling motions.

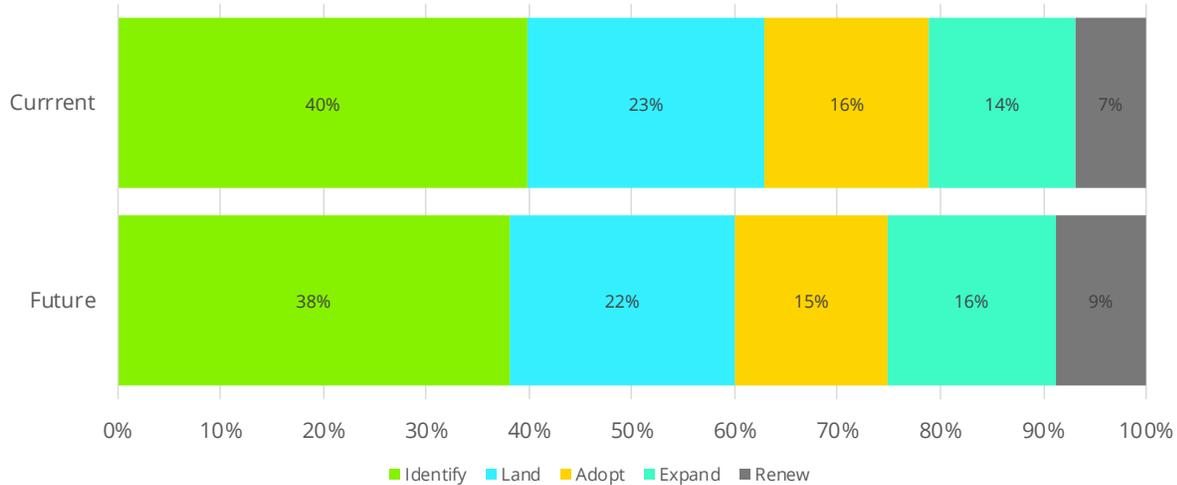
Winning sales organizations are no longer thinking of the selling process from qualified lead through order, but rather across the end-to-end cycle using the ILAER framework: Identify, Land, Adopt, Expand, and Renew.^{iv} They are placing more emphasis on engaging customers earlier in their buying process through top-of-the-funnel digital investments, increasing investments in inside sales and partner channels, developing new hybrid marketing sales roles, and giving customer service and success organizations a prominent role in sales. For example, 100% of Leaders surveyed said driving sales through channel partners was a priority (vs. 33% of Laggards) and they had nearly three times more partner-influenced sales. They also had 100% more digital channel sales with a plan to double it within three years.ⁱⁱ Companies that had digital sales channels also had 240% more orders from new customers than those without a digital sales channel.ⁱⁱ

Exhibit 9: Partner-influenced Bookings (Leaders vs. Laggards)

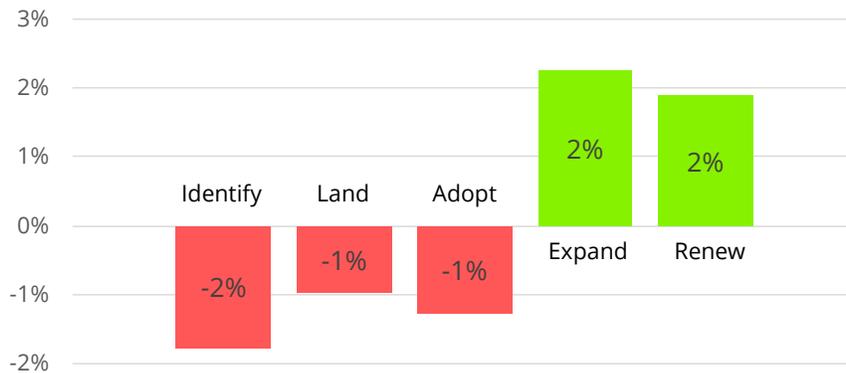


Source: Deloitte Digital's Future of B2B Sales Study, B2B Software and Infrastructure Companies

Exhibit 10: Time Allocation across all Sales Roles



Delta between today vs 3 years from now

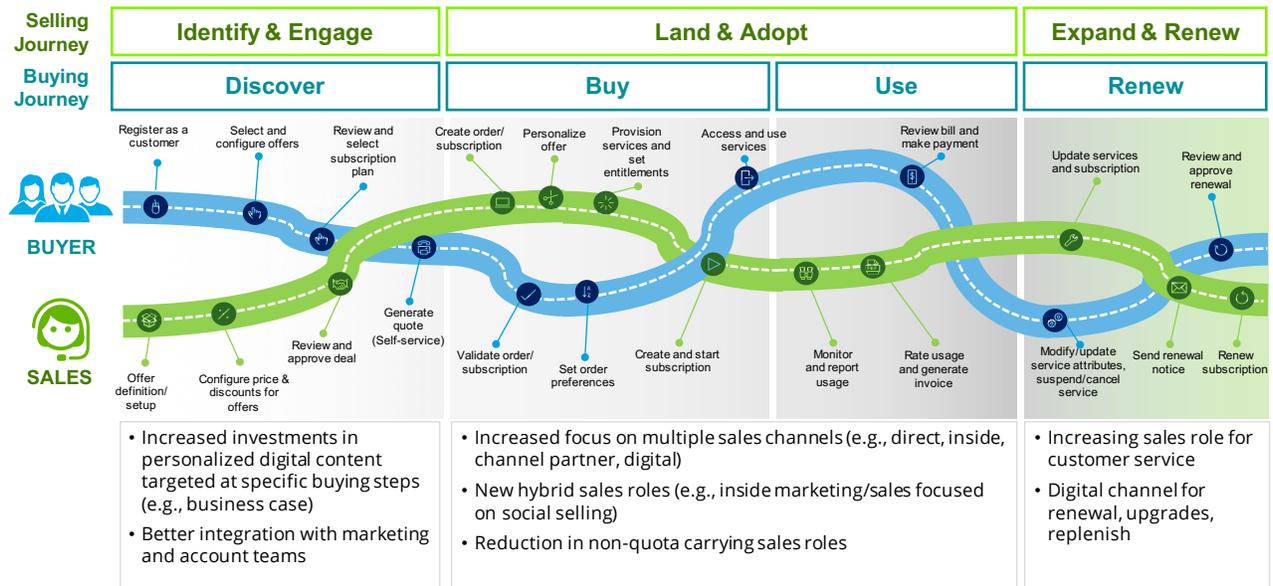


Source: Deloitte Digital's Future of B2B Sales Study

To win the largest deals and most complex customers, winning sales organizations are introducing new talent profiles to elevate the human experience and improve win rates. Finally, sales organizations are reconsidering whether their sales and annual incentive programs incentivize the collaboration and customer-centric behaviors needed to deliver better experience.

“
We need people who understand customer relationships, customer value, and customer adoption rather than the usual salespeople that can create a one-time ROI.”
- **Chief Revenue Officer**

Exhibit 11: Designing Selling Motions



Source: Deloitte

IN ACTION:
Rethinking Sales Investments

The biopharma industry has seen a 30% decrease in field sales reps over the past 10 years due to several factors – including doctors reducing access reps have to them, both in the number of meetings they take with reps and the time they spend during those meetings (biopharmadive.com). The industry has shifted to exploring digital marketing solutions. For example, to respond to changing customer behavior, a large global biopharma company built a self-service portal that allowed over 30,000 practitioners across Europe to access personalized marketing and sales content across a variety of media^v.

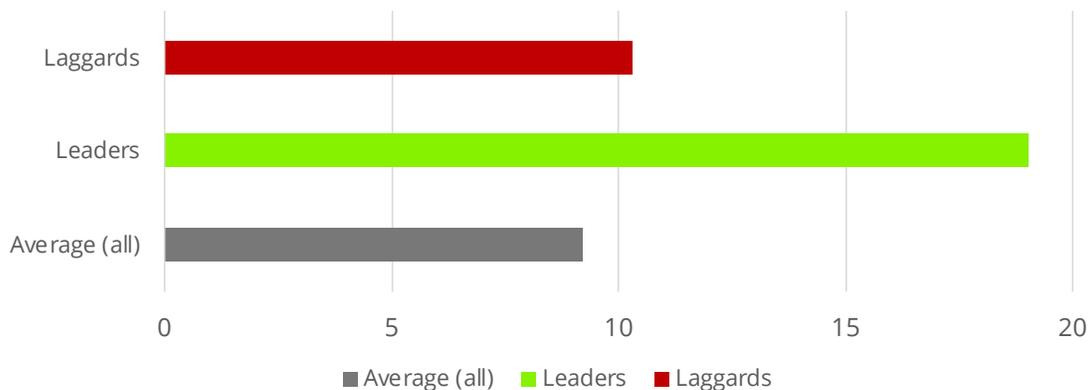


3. Emphasizing the seller experience – both direct and through partners – to improve the experiences of their customers

Delivering better customer experiences requires improving the human experience for sellers in addition to buyers. Today, B2B sales organizations are plagued with disparate selling tools, unintegrated data sets, and unintuitive user experiences. Adoption is low, and ROI is hard to quantify. A large B2B sales organization found that their best performing sales reps were rated higher than their peers by Managers for their pipeline management and account planning skills. Three quarters of those same overachievers, when surveyed, said pipeline management and account planning were critical to their success, but less than half said they consistently used their CRM tool. When interviewed, the highest performing reps were found to be managing these processes offline in spreadsheets due to poor user experiences.

Leading companies make it easier for sales reps to navigate complicated buying processes by reducing administrative burden and improving speed and ease for critical points of selling process. Our research found Market Leaders had significantly more sales enablement tools than Laggards because they were selecting or building the optimal tool for each capability and digitizing more sales processes.ⁱⁱ Having more tools required them to integrate data across digital sales tools and be more intentional about the user experience for critical sales interactions. Companies will need to address organizational barriers that keep siloed functions from operating as connected ecosystems with shared data (e.g., creation of Chief Revenue Officers to bring marketing, sales, and service more closely together). By creating a buyer and seller-centric view of the front-office architecture, Sales will be enabled to provide more value at each stage and respond faster to customer needs.

Exhibit 12: Number of Unique Sales Enablement Tools



Source: Deloitte Digital's Future of B2B Sales Study

IN ACTION:

Delivering Frictionless Seller Experiences

A major insurance company sought to evolve their distribution capabilities by improving seller experiences to improve recruitment and retention of millennial talent. They embarked on a journey to transform their sales-facing mobile and desktop capabilities to deliver better insights to agents and sales leaders. For example, they delivered a mobile solution that provided a modern, mobile field sales experience delivering insights about their pay and enablement capabilities, such as mobile claims submissions. Next, they improved the experienced of sales leaders by delivering real-time forecast variance dashboards, enabling leaders to respond quickly to events in the field.





4. Investing heavily in customer and sales analytics to deliver better insights embedded directly within the sales process and supporting tools

Data and insights are imperative to make decisions and engage customers in more dynamic ways. Customers are more informed than ever before and expect sales reps to understand them and to personalize offerings to them. One in five consumers is willing to pay a 20 percent premium for personalized services and this trend is now being witnessed in B2B.^{vi} In addition to higher margins, analytics capabilities can be valuable differentiators for sales teams. Our research shows that high-performing sales teams are 2.4X more likely to rate their team's analytics capabilities as outstanding or very good.

Winning B2B Sales Organizations are focusing on integrating insights into decision-making in four key areas:

1. **Customer Insights** to understand customer behavior better, and improve segmentation, targeting, and customer engagement
2. **Partner Insights** to better understand their channel partner landscape, including capabilities, reach, growth trajectory, and ability to deliver services and solutions
3. **Sales Planning** analytics to help sales leaders deploy resources more effectively by optimizing coverage and territories and predicting accurate sales forecasts and quotas to improve ROI
4. **Deal Analytics** to enable sellers to close bigger, better deals faster by focusing on the right leads and opportunities, recommending solutions and pricing, and predicting the next best action at each step of the selling process

An Insight-driven Sales Model delivers these insights and analytics to Sales and Partners when needed by embedding them directly into user-centric business processes, enabling sellers to improve customer experiences.

Customer Data Platforms are emerging as the new standard for creating single view of customer data and interactions that can be used to drive a variety of sales analytics and generate the long-promised, but rarely-delivered *Single View of the Customer*.

Exhibit 13: Single View of Customer through Customer Data Platform

WEB DATA

- Sites & Page views
- Video & white papers downloads
- Social conversations, likes, and comments

EVENTS

- Programs attended
- Pre-post registration and marketing



CALL CENTER DATA

- Customer complaints
- Q&A
- Tech support
- cross/up-sell
- Warranty and service calls
- Service contracts

DEALER INTERACTIONS

- Customer service
- Field sales
- Training
- Marketing support

FIELD SALES DATA

- Install base
- Marketing material distribution
- Lead gen & qualification
- Negotiations & contracts
- Pricing

Source: Deloitte, Enabling a Winning B2B Customer Experience

IN ACTION:

Deploying Insight-driven Sales

A large global investment manager facing sales productivity challenges due to intense competition and price pressure turned the tide by embedding predictive customer insights into sales processes. They started by defining a set of continuous customer journeys to introduce and reinforce the firm's value proposition. They assembled sales, potential, and behavioral data about customers (e.g., participation in marketing events) and built algorithms to target clients with specific products and generate commentary for sales people to use in meetings. They integrated these insights into desktop and mobile apps for inside and outside sales teams. The impact? It reduced meeting prep time, increased the number of meetings per seller and increased the revenue per meeting.



5. Modernizing their Sales Operations functions to be more strategic, end-to-end, agile, and value driving

Historically, Sales Operations has primarily been an operational organization to help create quotes, respond to RFPs, capture orders, and perform other administrative tasks. Providing more insight and driving sales strategy has often been a stretch goal, with scattered results. To deliver better B2B customer experiences, a new sales strategy and operations organization is being envisioned that brings together sales strategy with operations to support an insight-driven sales model and deliver improved seller experiences.

To start, Sales Operations leaders are creating additional capacity for strategic initiatives by automating operational tasks. Documenting detailed process steps for administrative actions help identify opportunities to simplify, standardize, and leverage robotic process automation. For example, at one large B2B sales organization, automation of order management processes is converting order processors to more value-add resources focused on getting in front of order issues to improve experience metrics, such as order accuracy and turn-around time. On average, Sales Operations teams are spending 34% of their time on sales support activities.^{vii} Many of these represent repeatable operational processes that are candidates for automation.

Sales Operations is also increasingly broadening its remit to include strategy, operations, data stewardship, and sales enabling technology under one umbrella. Sales Operations is now owning the end-to-end strategic planning processes and enabling capabilities needed to break down siloes and

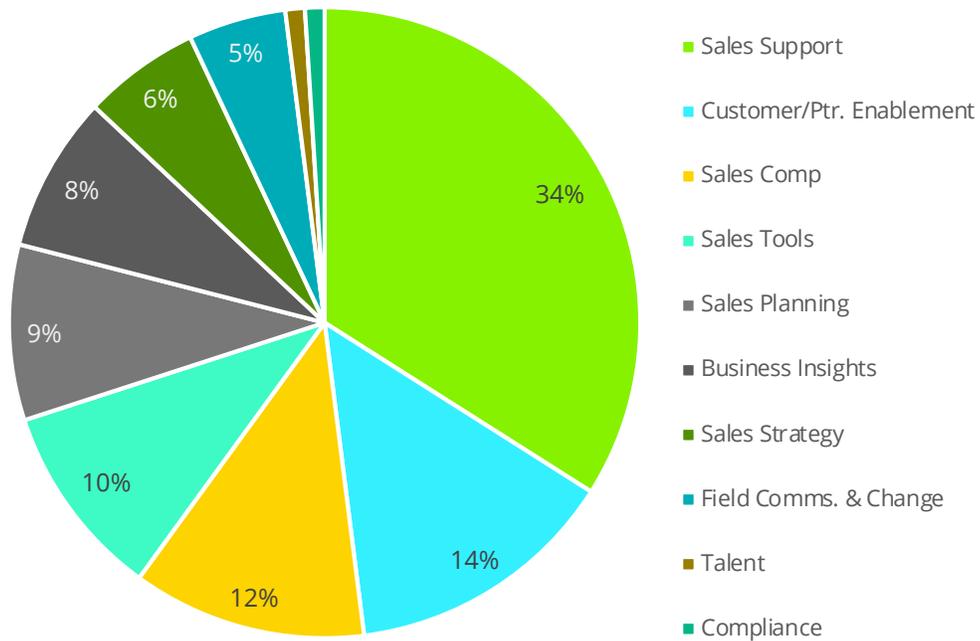
enable connected planning between customer segmentation, sales coverage, territory management, quota planning, incentive design, and sales forecasting. While over 20% of Sales Operations time allocated to these activities today on average,^{vii} leading organizations are connecting these activities with workflow and enabling them with predictive analytics, improving results, in less time and with fewer resources.

Sales Operations teams are building new and stronger capabilities in data management, data science, and machine learning, Sales Operations must become the strategic owner and leader of sales-enabling data; thus, helping to drive the consistency needed to harness of the power of data and drive predictive insights. On average, only 8% of Sales Operations time is allocated to business insights today.^{vii} Leading organizations are doubling down and building skills and capabilities in this area.

Finally, agile and human centric design methods are helping leading Sales Operations teams improve end-user experiences and digitize more sales enablement capabilities than Laggards. Design thinking approaches are delivering better tools to sales by designing not from systems out, but from the narratives that describe the interactions inward towards the systems that enable them.

Achieving these goals is requiring leadership alignment, new talent profiles, new ways of working with IT, a clear data vision and sales-focused architecture, and the right strategic KPIs for Sales Operations.

Exhibit 14: Sales Operations Activities Time Allocation



Source: Deloitte Digital's Sales Operations Benchmarking Study and Analysis

IN ACTION:

Modernizing Sales Operations

Faced with a complicated, long, and often inaccurate annual strategy and operations planning process (S&OP) aimed at kicking off each fiscal year, a Fortune 100 company developed an advanced analytics capability to improve their annual target-setting processes. By leveraging data science and redesigning their processes, they built predictive target-setting processes to determine quotas for their internal sales force as well as their third-party channel partners. The results were more accurate targets, set earlier after the start of each fiscal year, with less manual intervention required.



The Path Forward – Where to get started?

The environment sales organizations operate in today poses several new challenges, but also presents many opportunities. There are a host of new tools, technologies, and techniques available that if implemented wisely offer great possibilities for increasing sales reach, decreasing sales cost, and driving differentiated experiences.

Differentiated experiences at scale will require a holistic set of people, process and technology capabilities and a measured, disciplined approach to execution.

So where do you start? The Sales Leaders we spoke to that are tackling this challenge are taking three key steps to launch their transformations.

1. First, they are launching new efforts to understand their customer buying processes and sales and partner processes by conducting interviews, surveys, and field research through customer and partner advisory boards. They are taking the time to understand buyers internal processes as well as the sellers day-in-the-life to inform how they need to transform and define a vision for the interactions they want to create
2. Secondly, they are revisiting their operating models with a focus on bringing marketing, sales, and service closer together along with strategy and execution. In some cases, this means new organizational structures, while in others it means new cross-functional working groups with aligned goals, but the objective is clear – organizational silos are no longer acceptable
3. Finally, they are changing talent models to build more agile and data-driven cultures that will drive the transformation. This means changing talent profiles for existing roles and developing new roles. This involves recruiting more tech and data-savvy individuals comfortable with digital tools, but also sales teams that can engage with empathy, analyze root causes, and build solutions to create trustworthy partnerships with customers

As sales leaders formulate their strategies for the next 3 to 5 years, they must understand how ready they are to operate in this new environment. Sales leaders should ask these questions as they ascertain how ready they are:

- How well do we understand the buyer journey and investment allocation today?
- What are the buying journeys our customers take and what are the critical moments of that journey that we as sellers must enable for our customers?
- Do we deliver the experiences our sellers need at those critical moments, including our inside sales, channel partner, and customer success channels?
- What insights do we have and need across the buying and selling journey?
- Do we have the right skill sets and operating model to drive change in mindset and culture, digital tools and capabilities, and sales analytics and insights?
- What will the role of our Sales Operations team be to drive and support sales strategy and technology?
- Do our incentives support customer-centric behaviors?

Answering these questions provides insight for crafting a B2B experience that's human-centered and future-ready.



End Notes

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