TRENDS *in* SALES OPS

Insights from nearly 6,000 sales professionals on the sales ops role during a crisis

A Note From Elliot Greenwald
New research shows the sales ops role crystallizing during a crisis

Elliot Greenwald
Chief Operating Officer,
Salesforce Anywhere

Sales operations professionals are changing the game. They're using technology and processes to guide sales teams forward – which is anything but easy in a selling climate that's anything but certain.

That's why sales ops has more influence than ever in today's sales organizations. Their job responsibilities have expanded. They're building systems. They're implementing processes. They're now playing a pivotal role in driving business forward.

Because of this, sales ops is not only executing strategy, but also defining it. Today's work-from-home reality has blurred the lines between inside sales and field sales. It's now more important than ever to have a central, defined sales strategy.

In the fourth edition of our "State of Sales" report, we surveyed nearly 6,000 sales professionals. A vast majority emphasized the growing importance of the sales ops function. To help you understand the strategic importance of sales ops and the

role's roadmap, we've compiled data in this companion piece, "Trends in Sales Ops." We hope you find these trends helpful. And we hope you can use them to improve your operations and drive more business.

My team and I have already been finding the insights from this research useful. Two of my favorite findings:

- 85% of sales professionals say the role of sales ops is becoming more and more strategic.

- 84% of sales ops professionals say their digital transformation has accelerated, since the start of the pandemic.

As you pursue your own digital transformation, we hope you find new ways to grow revenue – with the full support of your sales ops team.

Elliot Greenwald

Elliot Greenwald, COO, Salesforce Anywhere

What You'll Find in This Report

For this "Trends in Sales Ops" report, Salesforce Research surveyed nearly 6,000 sales professionals worldwide to discover:

- The evolution of sales ops' responsibilities in a changing world
- Sales ops' role as a cross-departmental connector
- 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
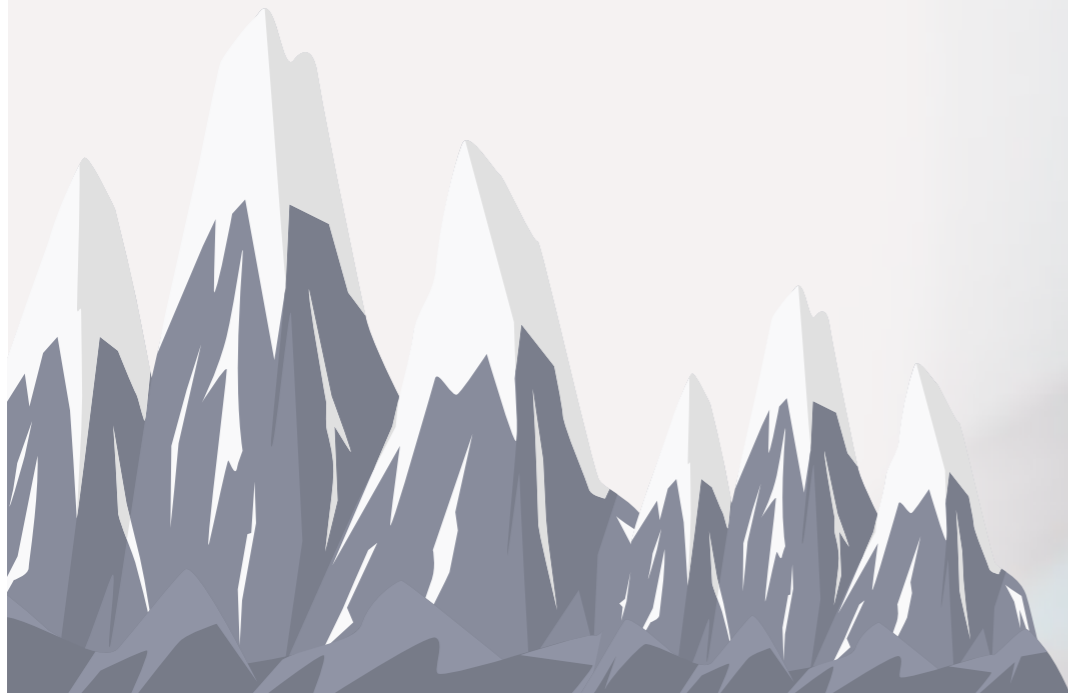
What You'll Find in This Report

Distribution of Sales Performance Levels

Throughout this report, we classify respondents across three tiers of sales organization performance.

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

Contents
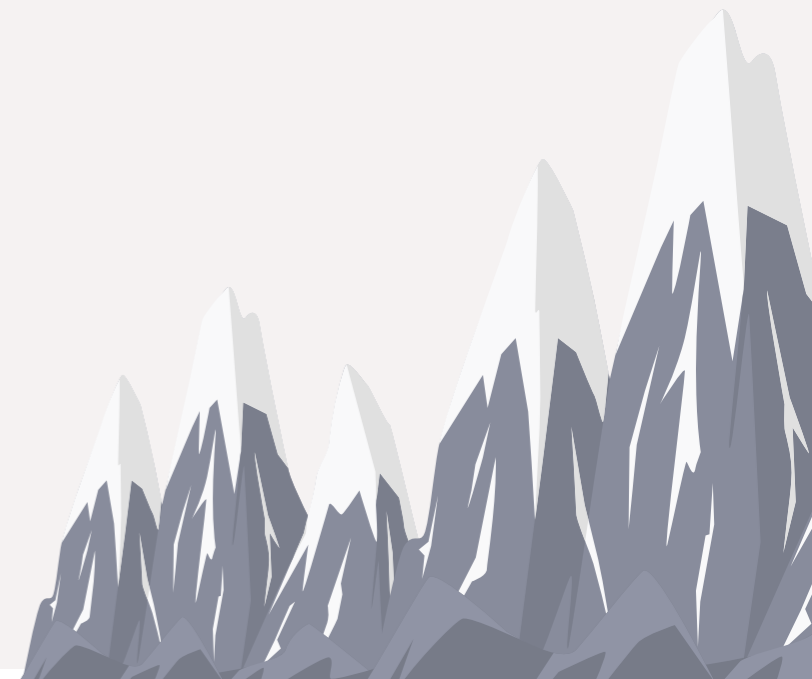
Sales Tools Shift, with Ops Leading the Way

Sales Operations Gets a Bigger Seat at the Table

Scope of Sales Operations Teams' Work

Limited to sales
strategy execution

Includes sales
strategy definition

| 44% | 56% |

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

64%
of sales ops
professionals expect
their roles to change
permanently
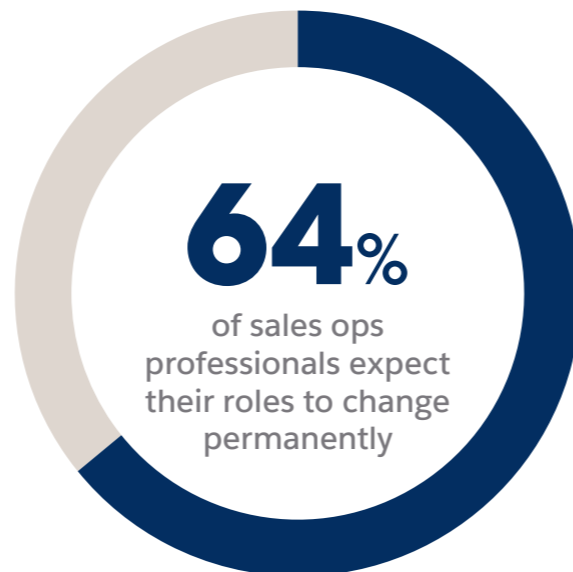
Base: Company has sales operations.

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.

Sales Tools Shift, with Ops Leading the Way

The Sales Operations Job Description Is Expanding

Change in Sales Ops Involvement Since 2019

|			
Sales strategy planning	56%	38%	6%
Sales performance analysis	55%	38%	7%
Sales strategy coordination	55%	39%	7%
Sales technology management	52%	42%	7%
Sales training management	49%	41%	10%
Cross-functional workstream management	48%	43%	9%

- Increased involvement
- No change
- Decreased involvement
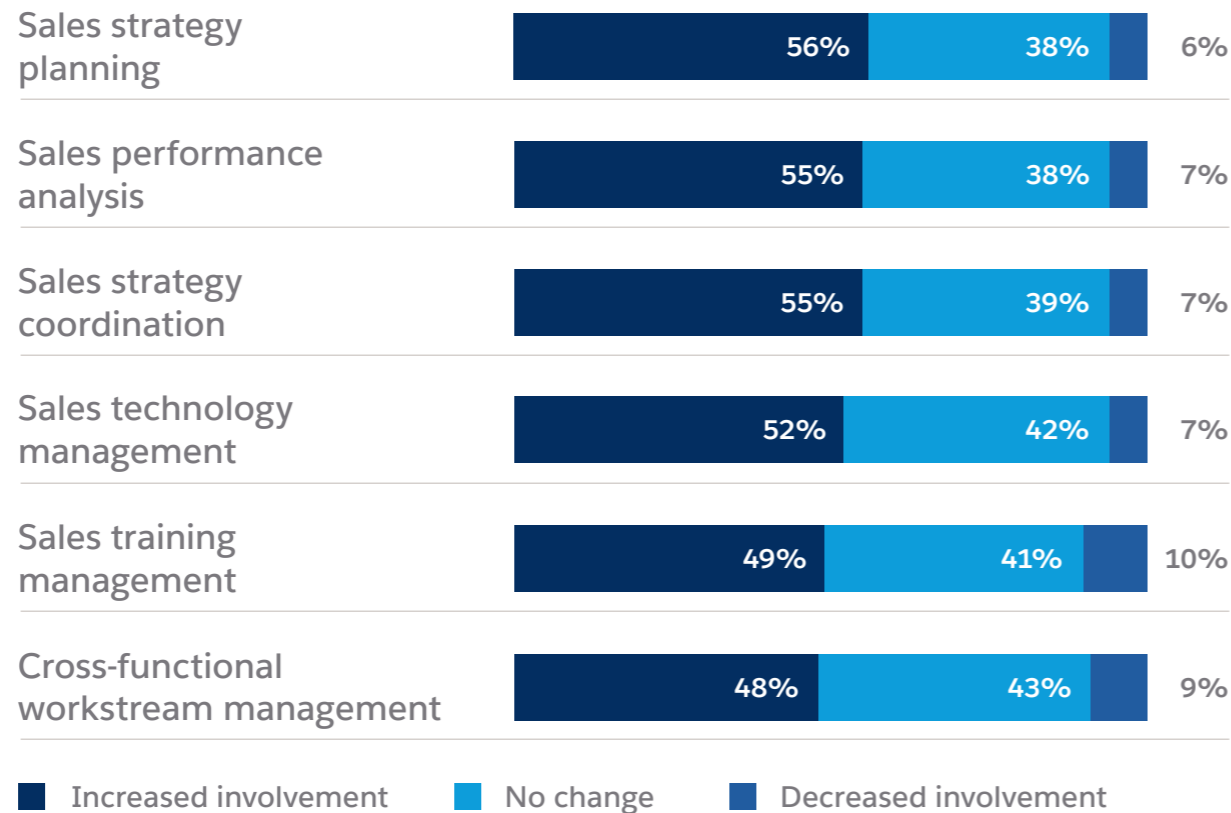
Base: Company has sales operations.
See more details on sales operations involvement across these activities on page 16.

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 Tools Shift, with Ops Leading the Way

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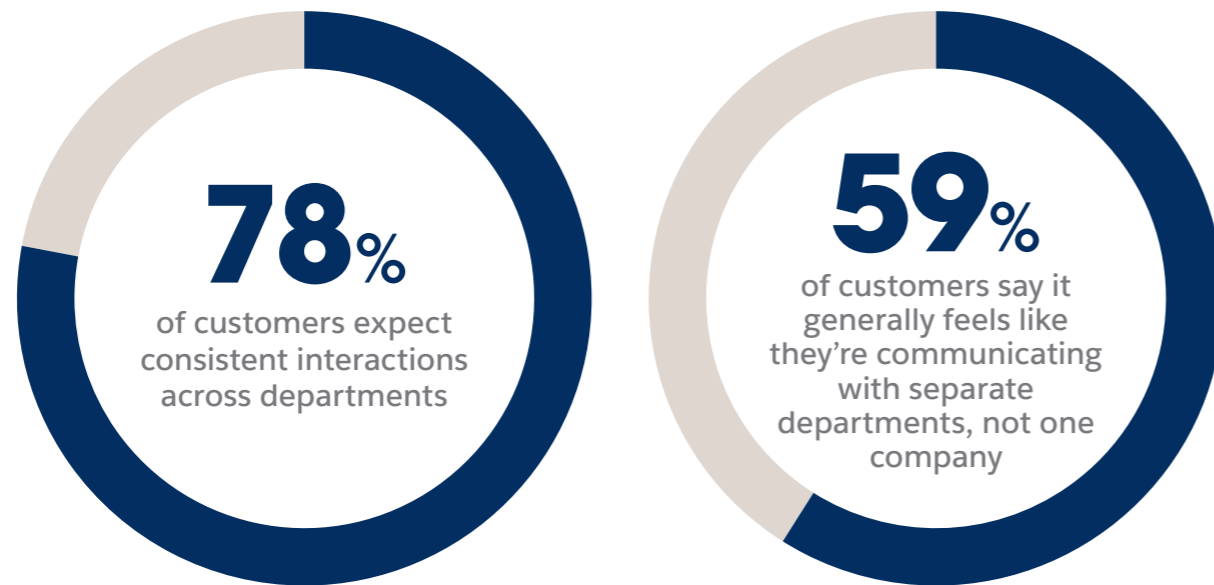
Source: "State of the Connected Customer," Salesforce Research, June 2019.

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.

Sales Tools Shift, with Ops Leading the Way

Top Sales Ops Teams Bridge the Cross-Functional Gap

48%

of sales ops teams have increased their involvement in cross-functional workstream management

67%

29%

43%

■ High performers   ■ Moderate performers   ■ Underperformers

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.

Base: At companies with sales ops.
See more details on sales ops responsibilities on page 16.

Sales Tools Shift, with Ops Leading the Way

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
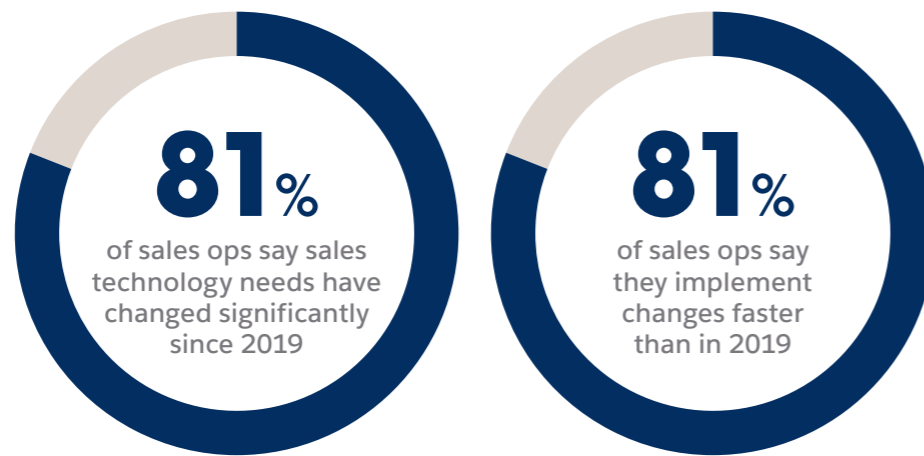
Top 5 Sales Tools That Have Become More Valuable Since 2019

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 Tools Shift, with Ops Leading the Way

AI Reaches Critical Mass with Top Performers

Sales Organizations Reporting AI Use

37%

21%

76%
increase

2018   2020

AI Adoption by Sales Performance Level

High performers vs.
Underperformers

57%

31%

2.8x
more likely to use AI

20%

■ High performers   ■ Moderate performers   ■ Underperformers
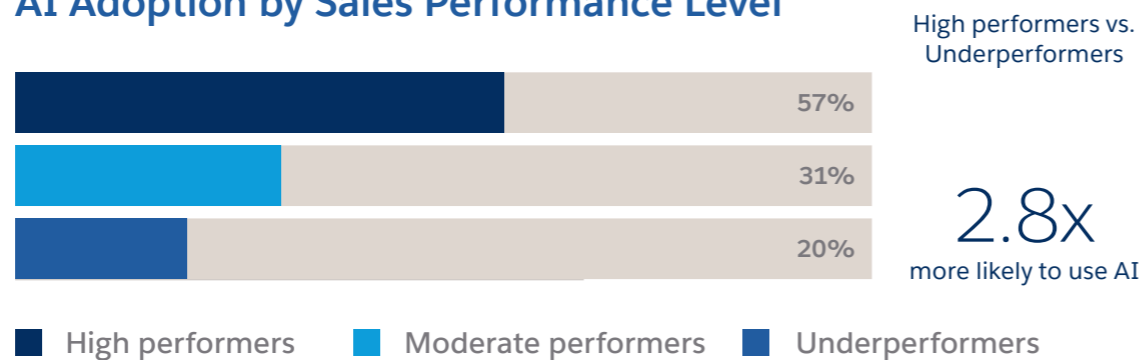
Base: Sales leaders

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.

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

Sales Tools Shift, with Ops Leading the Way

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 21.

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 21 for data on AI and headcount for

AI and Hiring Go Hand in Hand

Headcount Changes Since 2019 by Sales Organization AI Use
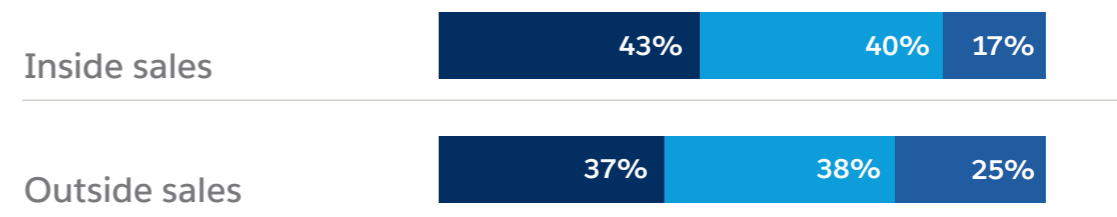
Using AI

Inside sales: 57% | 32% | 11%

Outside sales: 55% | 25% | 20%

Planning to Use AI

Inside sales: 43% | 40% | 17%

Outside sales: 37% | 38% | 25%

Not Planning to Use AI

Inside sales: 18% | 56% | 26%

Outside sales: 15% | 51% | 34%
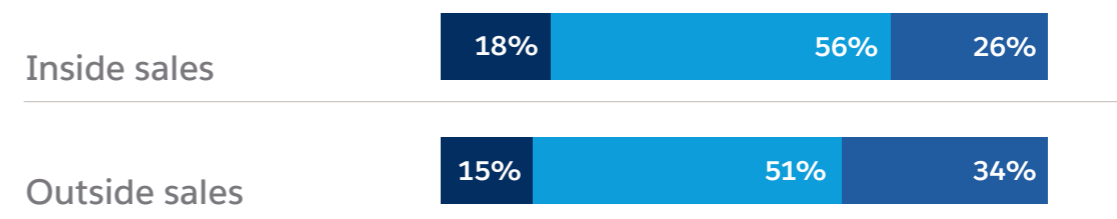
■ Increased headcount   ■ No change   ■ Decreased headcount

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

APPENDIX

Extent to Which Sales Ops Is Involved in the Following

	Owns exclusively	Co-owns	Contributes	Not involved
Sales performance analysis	37%	40%	21%	2%
Sales strategy planning	36%	40%	22%	2%
Sales strategy coordination	35%	41%	21%	2%
Sales training management	34%	37%	24%	5%
Sales technology management	34%	38%	24%	4%
Cross-functional workstream management	29%	40%	27%	4%

■ Owns exclusively   ■ Co-owns   ■ Contributes   ■ Not involved
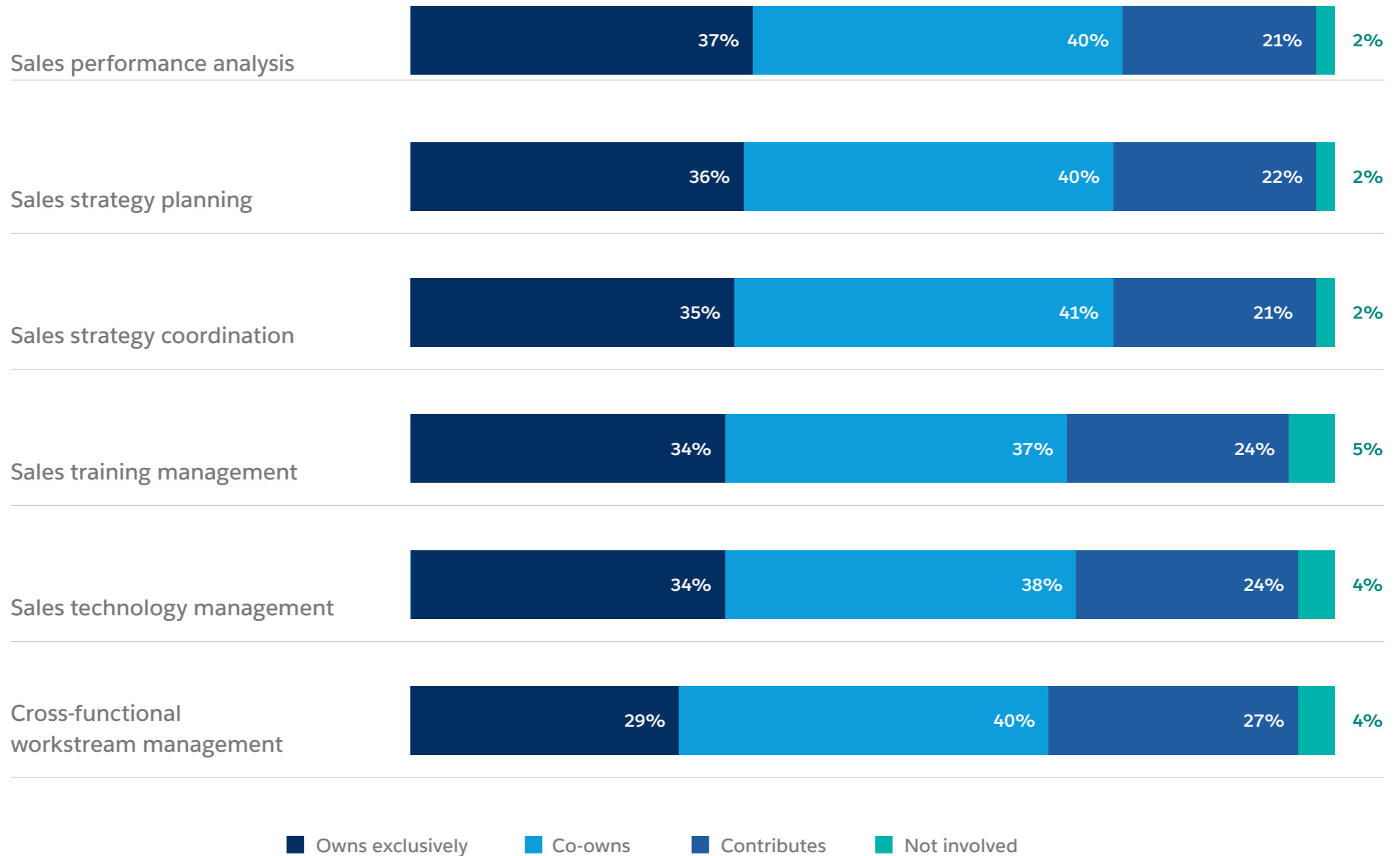
Base: Company has sales operations.

Sales Organizations Using the Following Tools

Email/CRM integration*
79%
61%

Account and contact management
70%
65%

Sales reporting/analytics
67%
70%

Customer relationship management (CRM) system
65%
59%

Sales forecasting tools
64%
57%

Sales coaching and training solution
62%
55%

Compensation/incentive management
58%
48%

Sales prospecting tools
58%
45%

Mobile sales app(s) for employees
57%
45%

Sales process automation
53%
41%

Customer insight tool
51%
44%

Opportunity management
51%
40%

Marketing automation
49%
34%

Competitive intelligence
49%
48%

Configure-price-quote (CPQ) solution
48%
38%

Partner relationship management (PRM) solution
48%
35%

■ This year   ■ 2018

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: 67%
- Reps: 60%
- 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%

Legend: ■ Sales leaders ■ Reps ■ Sales operations ■ Sales support

Responses of "completely confident" or "mostly confident."
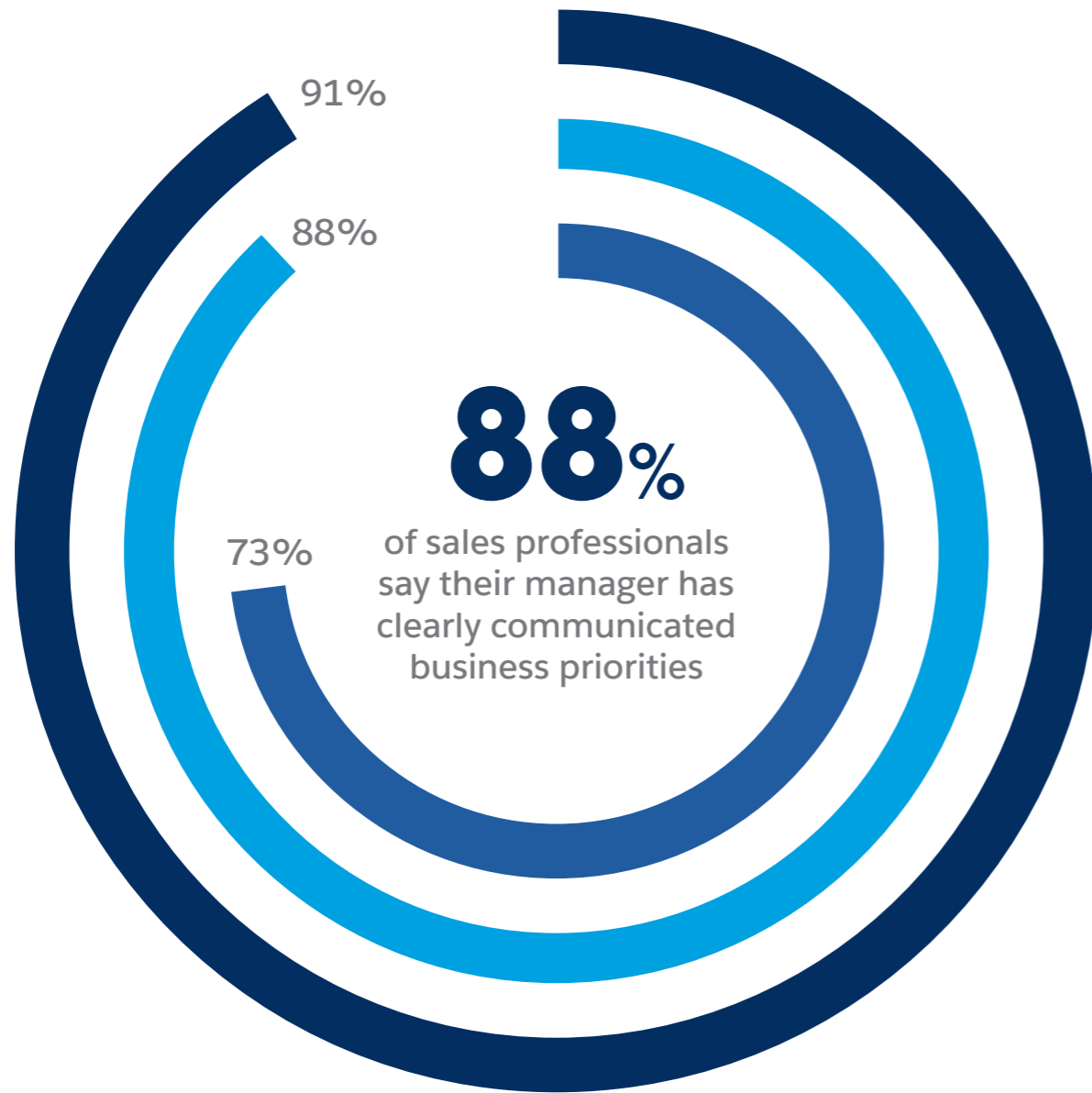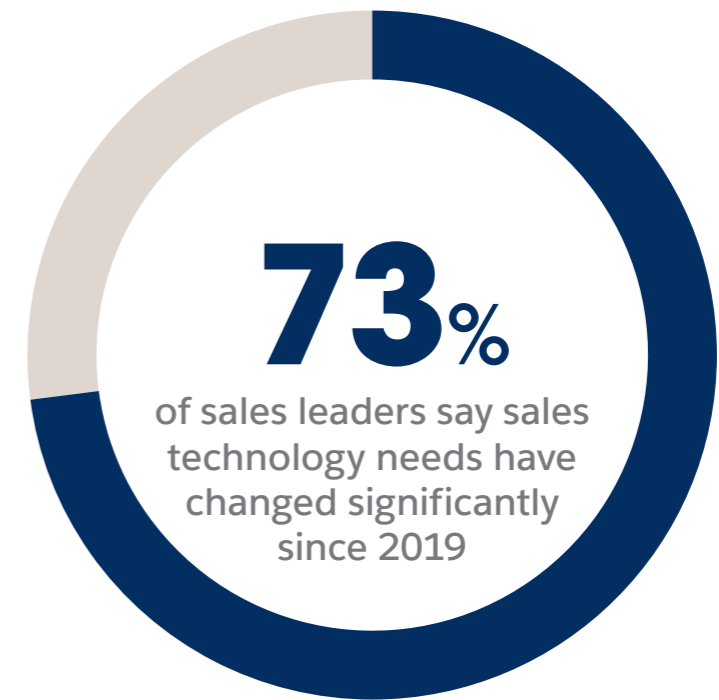
91%

88%

73%

88%
of sales professionals
say their manager has
clearly communicated
business priorities

■ High performers   ■ Moderate performers   ■ Underperformers

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

Sales ops
| 57% | 32% | 11% |

Channel/partner sales
| 53% | 33% | 14% |

Sales support
| 54% | 31% | 15% |

Planning to Use AI

Sales ops
| 43% | 40% | 17% |

Channel/partner sales
| 40% | 40% | 20% |

Sales support
| 43% | 39% | 18% |

Not Planning to Use AI

Sales ops
| 15% | 54% | 30% |

Channel/partner sales
| 15% | 57% | 27% |

Sales support
| 15% | 57% | 28% |
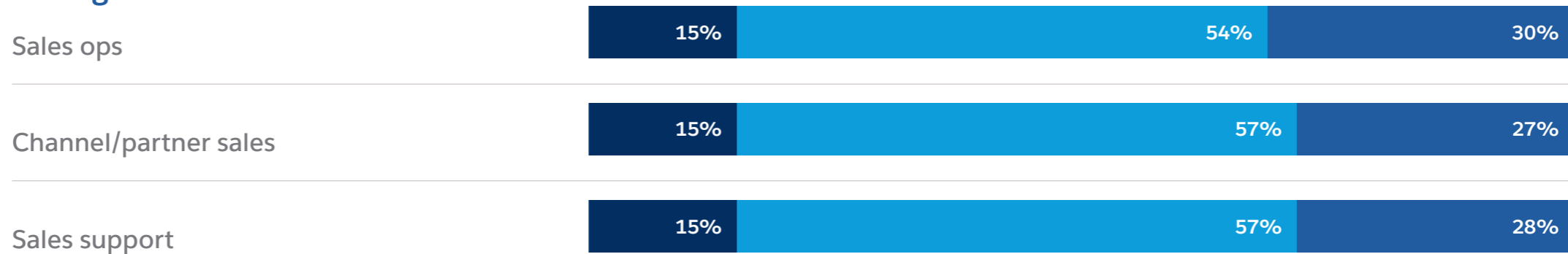
■ Increased headcount   ■ No change   ■ Decreased headcount

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

Changes in Headcount Across Sales Roles Since 2019

Role	Increased headcount	Maintained change	Decreased headcount
Inside sales	41%	41%	17%
Sales operations	40%	42%	18%
Channel/partner sales reps	39%	42%	19%
Sales support	39%	42%	20%
Outside sales	36%	38%	26%

■ Increased headcount   ■ Maintained change   ■ Decreased headcount

Base: Sales leadership.
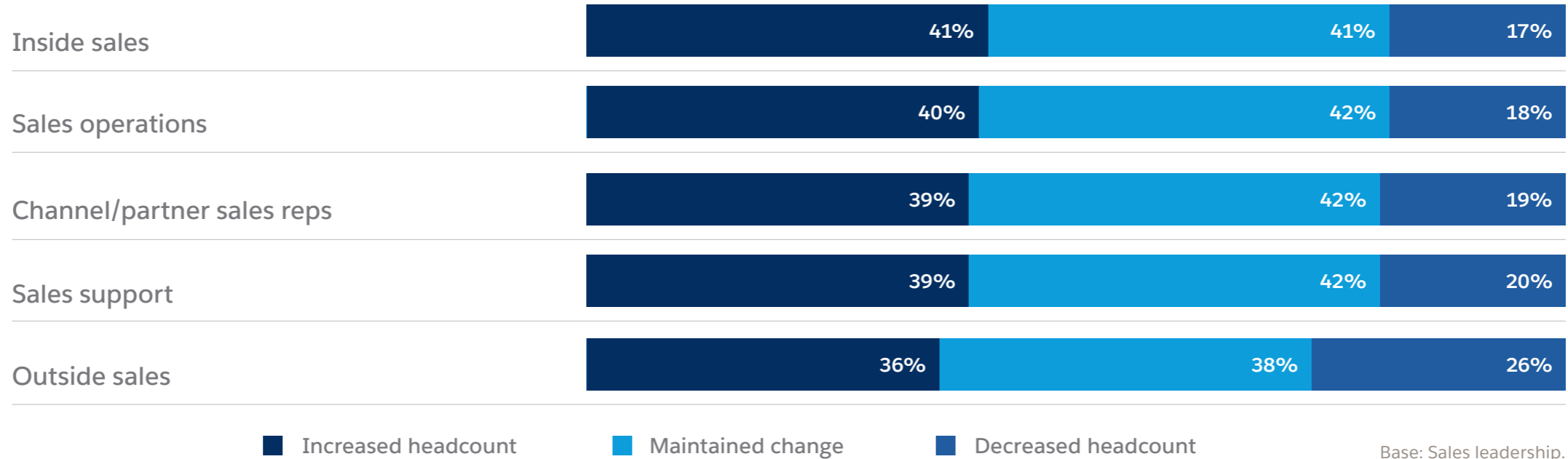
Sales Leaders Who Say They Will Adjust Staffing in the Following Ways

Reskill existing employees

65%
65%
56%

Hire new employees

23%
60%
46%

Lay off existing employees

30%
37%
42%

■ High performers   ■ Moderate performers   ■ Underperformers
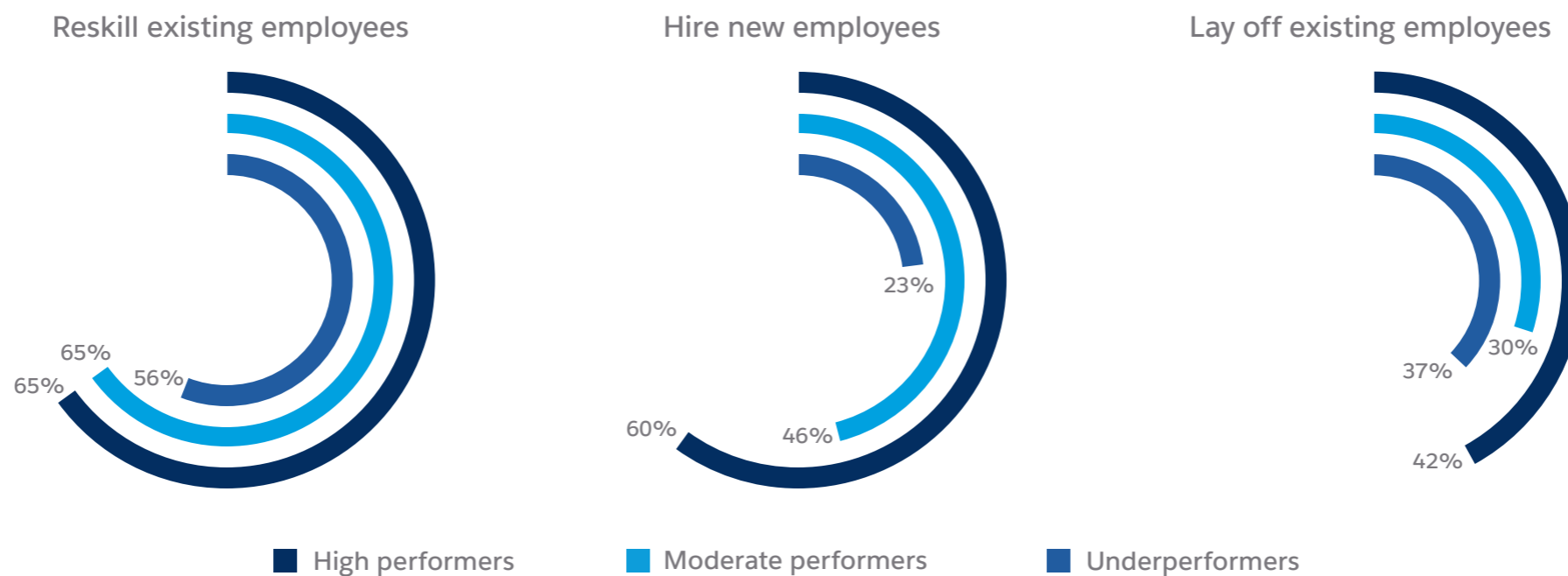
Degree of Improvement to the Following From Artificial Intelligence

Understanding customer needs
| 52% | 32% | 13% | 2% |

Forecasting
| 47% | 38% | 12% | 2% |

Visibility into rep activity
| 46% | 38% | 13% | 2% |

Competitive intelligence
| 46% | 37% | 14% | 2% |

Lead prioritization
| 46% | 38% | 13% | 2% |

Use of reps' time
| 45% | 36% | 16% | 2% |

Personalization for customers
| 45% | 40% | 13% | 2% |

■ Major improvement   ■ Moderate improvement   ■ Minor improvement   ■ No improvement
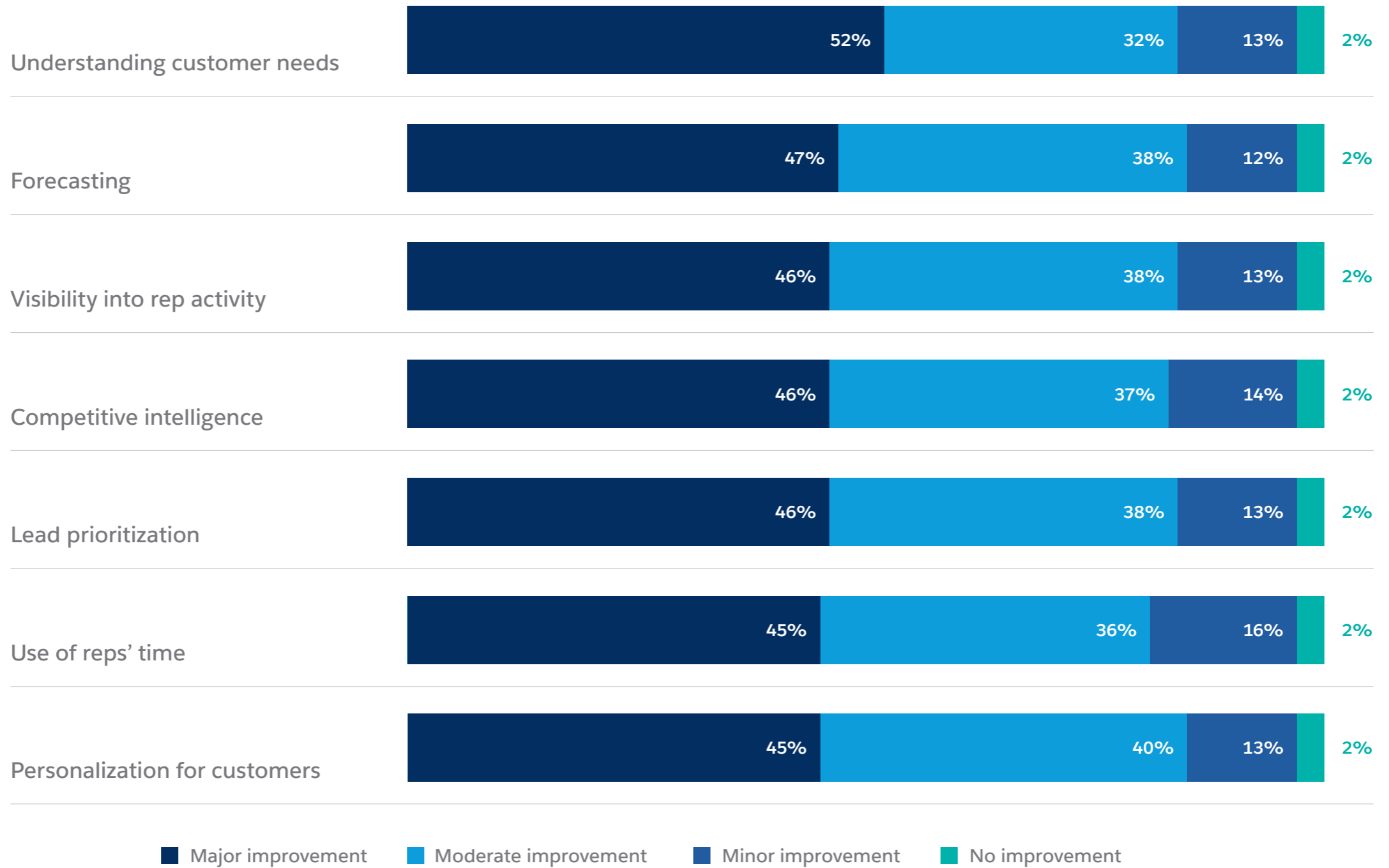
Base: Sales operations and sales leadership at companies using AI.

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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