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Does your **CRM** leave money on the table?

About the Author

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Executive overview

The COVID-19 pandemic and ensuing Great Resignation have battered sales organizations, but sellers remained resilient. To gain insight into how sellers have adapted and what challenges they still face, we polled more than five hundred experienced sales professionals (n=518) in January 2022.

We found that most sellers have been resilient throughout these shifts and have made improvements in meeting sales goals since experiencing a significant dip in performance in 2020. However, up to one-third of sellers still struggle with many parts of traditional selling, including closing deals and meeting quota. While not the majority, one-third of sellers is significant and will affect overall sales organization performance.

Sellers identified several major challenges in their daily jobs, including the burden of too many manual tasks, antiquated selling practices, constraints from the pandemic, too much uncertainty around closing deals, and continual change with customer contacts — all affecting their ability to sell. Nearly half

had complaints about lead scoring and the leads delivered to them, and more than half admitted their sales organization lacks best practice processes and/or the technologies to support them.

Sellers also told us they are spending too much time on the wrong things. For instance, they devote a sizeable chunk of time to non-selling efforts, such as mentoring and onboarding new sellers, robbing them of precious customer-facing time.

These related problems can be eased by modern technologies — technologies that the data suggests sellers are keen to adopt yet are not necessarily the tools of the traditional customer relationship management

(CRM) set. Our study found that although many organizations have adopted automation to offload some manual tasks, sellers are overwhelmingly ready for more.

While most sellers make quota, the large minority who struggle is enough to bring down overall sales performance raising the question:

What would organizational sales attainment be like if one-third of sellers were not having trouble?

In this Beagle Research study, we identify many issues holding back sellers and make recommendations for improvement.

Key Findings

There are five significant takeaway points from our study, which we describe and then review in a broader analysis below.

01 While seller resiliency emerged as a key finding, up to one-third of sellers still consistently have trouble with various aspects of their jobs, impacting their ability to make quota. Several hurdles that sellers faced while trying to meet their goals stem from deficiencies in time and resources.

02 The pandemic and Great Resignation have changed who sellers engage with and how. Buyers, as well as their preferences and behaviors, are changing, requiring sellers to change too. Buyers are often engaging later in the buying journey, yet they still expect sellers to understand their needs. Now more than ever, sellers must quickly get up to speed — and bring their buyers with them — on product history, past communications, and deal progression.

03 Sellers would be happy to offload more mundane and time-consuming tasks if it gives them more selling time. Traditional sales force automation (SFA) provides record keeping but at the high cost of increased overhead. Rather than simplifying record keeping tasks, sellers would be glad to eliminate them. Inputting customer information, documenting milestones, tracking materials shared with the customer, and many other tasks can all be automated.

04 More than half of those polled said their organization lacks sales processes and/or the technologies that support them. While many sellers chafe at observing formal processes, when combined with advanced sales technologies they can help orchestrate selling and deliver better outcomes. Generating proposals and quotes, recommending specific content to share and when, identifying the best leads to follow and which deals are more likely to close are all process steps that, when presented as assistance rather than mandates, are welcomed.

05 Organizations have invested heavily in solutions and methodologies to help simplify those tasks, but traditional systems often focus on making sellers' work easier rather than removing it entirely. That's an old story. Our data shows that sellers are open to receiving assistance from advanced technologies to offload rote tasks. They want to reduce the amount of work they put into routine tasks that keep them from selling.

Survey data snapshot

For some survey questions, sellers were asked to rank their response on scales of one to five, with three being neutral. Some methodologies, such as the Net Promoter Score (NPS), exclude neutral responses to better highlight the delta between customers who are willing to endorse vendors and those who don't.

Our study had a different objective, so we counted neutrals differently. Responses that rated a question one or two (i.e., positive) were grouped together, while neutrals (three) were grouped with negative responses (four or five). The reason is simple. We believe that a seller is either very satisfied or at least satisfied (one or two) with the tools, technologies, and resources at their disposal, or they are not. As it turns out, even with excluding the neutrals, the number of negative answers was high enough to indicate a problem that could easily lower sales performance.

Sellers persevered throughout the pandemic

Sellers are resilient. You don't go into sales and stay there unless you are a self-starter with thick skin. Based on our findings, the pandemic proved this point with sellers' attitudes toward their jobs and quota attainment.

In 2019, 72% of sellers said they reached their goals. That number declined significantly in 2020 to 51%, but regained ground in 2021 to 64%.
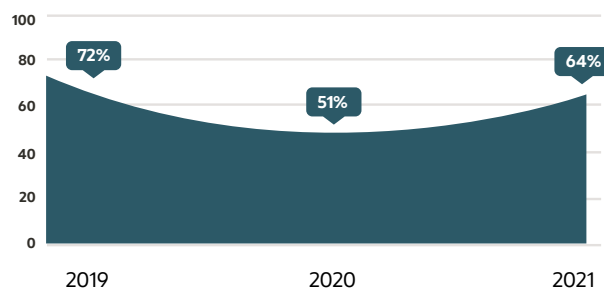
While this track record and recovery is impressive, there's still sizeable room for improvement if more than one-third of the sales organization is failing to meet quota. And given that market disruptions and downturns are a natural part of the economy, it makes sense to have systems in place that can support sellers through difficult times, thereby helping, or at least lessening, dips in performance.

Of the sellers we surveyed during the pandemic, **76% had been in sales** for more than five years.

During this time:

19%

changed jobs

81%

did not change jobs
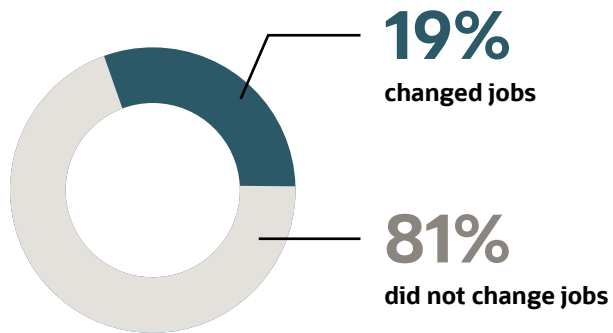
For the 19 percent of sellers who did change jobs, 59 percent did so for professional reasons, such as compensation (24 percent), work/life balance (17 percent), and career growth (18 percent). That's about what you'd expect in a "normal" year.

Only 11 percent of those who changed jobs did so for existential reasons, such as rethinking their lives, while 18 percent left due to staff reductions.

Despite resilience, nearly one-third of sellers still struggle

While not a majority, one-third is a large enough group to affect overall results. Our data consistently showed that roughly one-third of respondents expressed doubts about or dissatisfaction with various areas of their selling practices and the resources and tools made available to them.

For instance, 33 percent of sellers rated their sales training as neutral, inadequate, or completely inadequate, and 38 percent said the same about their CRM. The group is highly critical of many things related to leads; nearly half were neutral or negative about lead scoring (46 percent), lead generation (43 percent), and lead quality (40 percent). Moreover, 38 percent rated their proposal generation tools as neutral, inadequate, or completely inadequate.

These sellers are highly conscious of how they spend their time. Fully 39 percent of sellers said they spent too much time working in different technologies and nearly one-third (27 percent) said there were too many manual tasks that kept them from selling. In addition, 59 percent of sellers said they were involved in training or onboarding of new sellers — a task that took four to five hours per week for more than half of this group (52 percent), and more than five hours for over a quarter of these respondents (26 percent). This time drain takes sellers away from selling and makes it much harder for them to gain a fuller understanding of customers and their needs.

Churn from the Great Resignation further complicates selling

The Great Resignation has affected sellers in some surprising ways. A quarter of sellers said their customer contacts kept changing, which isn't surprising given current trends. According to MarketWatch, almost 39 million people — across various industries, experience levels, and departments — quit their jobs in 2021.[1]

Data from the US Bureau of Labor Statistics showed that 4.36 million professionals quit in September 2021, 4.16 million quit in October, and a staggering 6.27 million quit in November 2021.[2]

A recent *Harvard Business Review* article noted that the cohort of employees between 30 and 45 years old showed the greatest increase in resignations, with 20% leaving between 2020 and 2021.[3] Many of those people were mid-level managers with budgets, who routinely bought items, such as technological solutions, in their roles.

The effects of these resignations and job shifts showed up in our data as well — 43% of sellers said customers are pulling back on purchases, and 39% said customers are taking longer to make decisions. Both factors slow down buying cycles and risk a seller's ability to hit quota. With these new buying behaviors and constantly changing customer contacts, it is not surprising that 23% of sellers said there was too much uncertainty over whether a deal would close.

[1] Bartash, Jeffry and Greg Robb, "The Great Resignation slowed in October, but 4.2 million Americans still quit jobs," MarketWatch Economic Report, December 8, 2021.

[2] "Number of quits all-time high in November 2021," US Bureau of Labor Statistics, January 6, 2022.

[3] Cook, Ian, "Who is driving the Great Resignation?" in Harvard Business Review, September 15, 2021.

The pressure on sellers comes from many sides and would still be there, albeit in smaller numbers, during better times. However, 36 percent of sellers said that customers are less tolerant of mistakes and delays. Also adding delay, 40 percent said that customers are more willing to shop for the best offer, and 36 percent said customers are doing a lot of their own research, thereby putting off engaging with the seller.

Simply put, our data suggests that sellers are being abstracted from the purchasing process.

This poses challenges not only for the seller, but also the buyer. New buyers — if they're lucky — inherit files and notes about existing brand relationships, but likely don't get the same level of detail on potential solutions or purchase history. As a result, new buyers must retrace past purchases and processes, adding delay to the sellers' pipelines.

This suggests a new need for sellers to efficiently capture each step in the sales process, including the involved decision makers, the products under evaluation, and the supporting information that's been delivered. Buyers may not have those systems of institutional memory, so this presents an opportunity for sellers to step up and guide buyers through the purchasing journey with insights and recommendations to increase buyer confidence — and not just pitch products.

Half of sellers lack clear sales processes, supporting technologies, or both

A successful sales process is not the result of luck. It involves the seamless connection of people, resources, and information to drive to a specific conclusion. Each deal generates a significant amount of data that must be managed and mined, yet we found that fewer than half of the sellers (46 percent) use technology-supported sales processes.

Although it's been decades since CRM and SFA were first introduced, less than half of organizations use these tools optimally. According to our data, 16 percent of sellers describe their sales processes as the Wild, Wild West — where sellers make decisions based on intuition, rather than on data or best practices. Another 38 percent say they have a process, but it is not supported by technology. The results of process without technology are likely to be very uneven, while no process and no technology is no better than a coin toss.

Sales force automation alone is not enough. Only 41 percent of sellers said SFA helps them sell more, 23 percent said it helps their manager but not them, 33 percent said it's great for data entry but not much else, and 20 percent agreed that it takes too much of their time.

This might be disheartening because CRM and SFA were supposed to be tools that help streamline the sales process and improve deal progression. While these technologies have helped capture important data about customers and deals, they've also proven to be so time and labor intensive that they crowd out actual selling time.

Capturing sales data is an important part of selling, but it shouldn't be a seller's main job. Rather than burdening sellers with data entry, automation can offload the mundane tasks of selling. That wasn't always possible, but it is now.

Sellers are keen for assistance, AI and advanced automation can provide it

Of the sellers we surveyed, 30 percent said they already use artificial intelligence (AI) to recommend content to share with a customer, 33 percent use AI to track deal progress, and 32 percent use it to automate data entry or generic tasks, such as sending follow-up letters. Some sales organizations also use AI-based systems to write quarterly or weekly reports and generate forecasts, initial quotes, and/or proposals.

According to our data, many sellers are open to increased AI assistance with their jobs. When asked about the above-mentioned tasks as well as others, strong majorities of sellers said they would indeed trust AI to help.

There is a stark difference between sellers' opinions of technologies, such as SFA, and how they view the potential of AI. Whereas most sellers have negative views of traditional sales technologies, significant majorities would be happy to let AI offload their rote work in numerous ways.

Percentage of sellers who trust AI to perform various selling tasks

Task	%
Track deal progress and activities	**79%**
Automate data entry tasks, like sending follow-up letters	**78%**
Recommend content to share with a customer	**74%**
Recommend next steps to progress my opportunity	**73%**
Automatically qualify leads	**67%**
Generate an initial quote or proposal	**65%**
Write quarterly/weekly reports or forecasts for management	**65%**
Highlight deals to focus on to close the quarter	**59%**

Conclusions

The pandemic and the Great Resignation have exposed long-standing problems and inefficiencies in most companies' sales processes. Contrary to some prognosticators, our data suggests that quota attainment and sales success aren't just about hiring the right sellers. In fact, our data suggests that most organizations have competent, hard-working sellers onboard. Sellers proved their worth through recent difficult times, and while they didn't always make their numbers, it's reasonable to say that if there was a deal to be made over the last two years, they went after it.

Our data shows that too many sellers — roughly one-third — have problems with existing tools and technologies, which eats into their primary responsibilities. Sellers can either perform manual tasks that could be offloaded through automation, or they can attend to customers — but they don't have time to do both.

We found that sellers would gladly welcome automation assistance for numerous selling activities if that assistance off-loaded rather than just simplified those tasks. Some AI applications, such as recommending content and next steps, lead qualification, initial proposal generation, and report writing, were more attractive to sellers than others. While the benefits of using a technology-supported sales process have been apparent for years, most organizations struggle to incorporate them in their efforts. A different approach to selling tasks based on intelligent assistance rather than rigid dictates would be welcomed by a large swath of sellers.

Markets continually change; so must selling. The solution to today's selling challenges is to incorporate automation that offloads tedious tasks and adds structure to the sales process without disrupting the buying cycle or a seller's workflow. Doing so will help sellers feel they are working with automation rather than for it.

About the survey

In January 2022, we surveyed 518 professional sellers, 76 percent of whom had more than 5 years' experience each. They came from companies with revenues of at least $500 million. One-third came from companies with at least $1 billion in revenues, while 24 percent had 20,000 or more employees. Our seller respondents came from a variety of industries, including banking and financial Services (13 percent), consumer packaged goods and retail (22 percent), industrial manufacturing (11 percent), and technology (13 percent). The vast majority (83 percent) were employed full time, with 12 percent part time. And 81 percent did not change jobs during the pandemic.

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