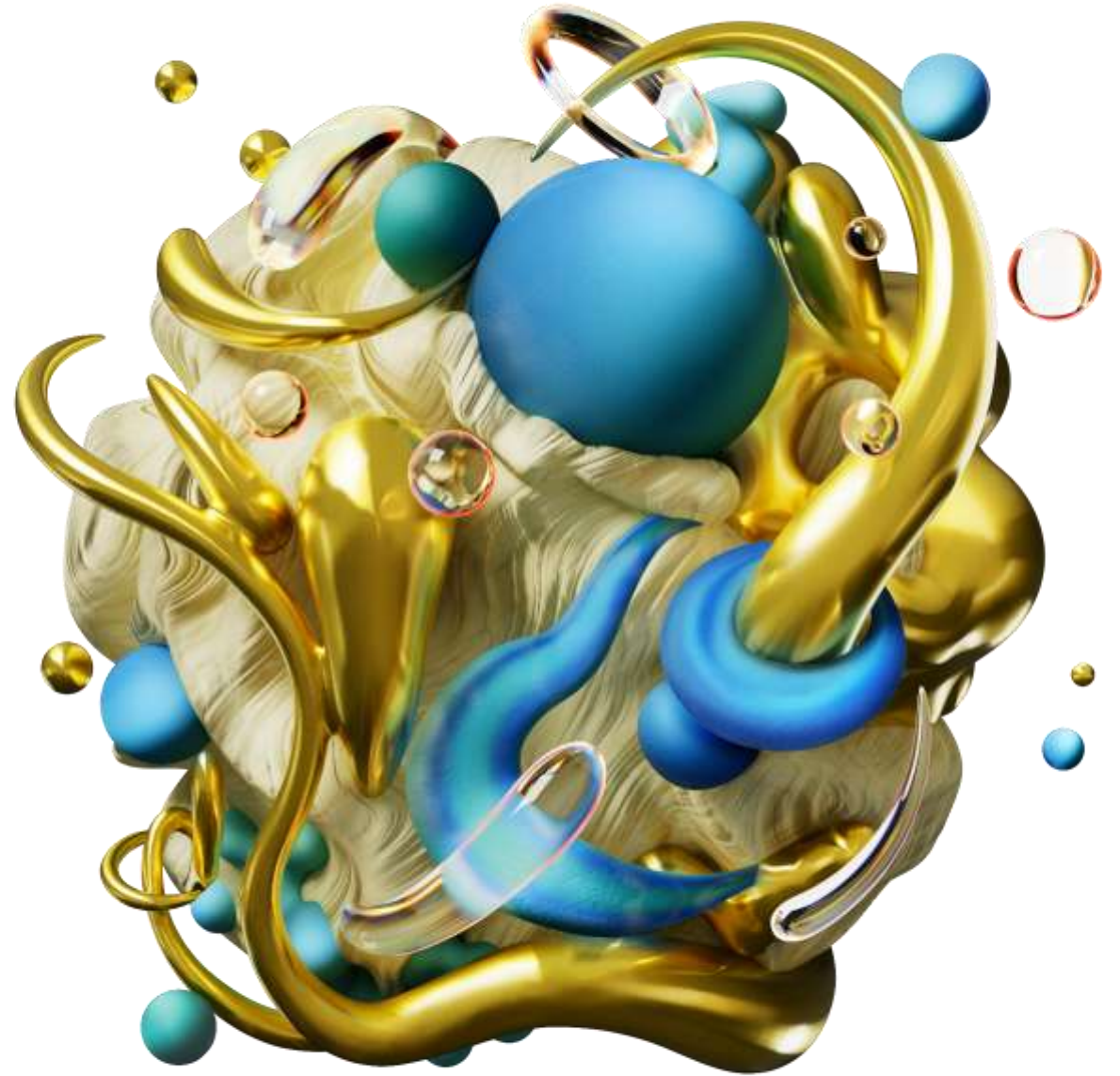


July, 2024

Deloitte: 2024 *Future of Sales* Findings



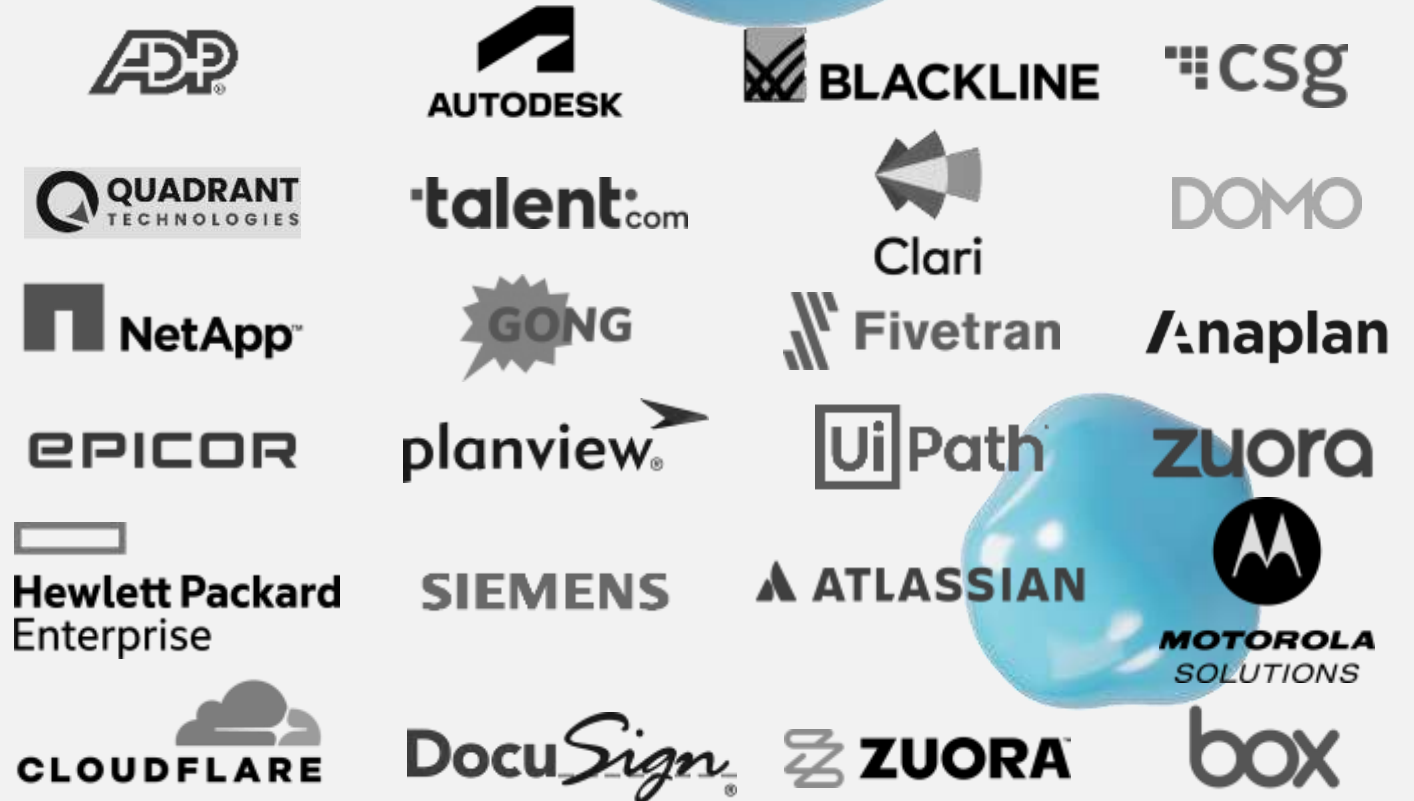
The Future of Sales Program Examines Leading Trends and Practices for Software and Tech GTM decisions

6TH YEAR RUNNING

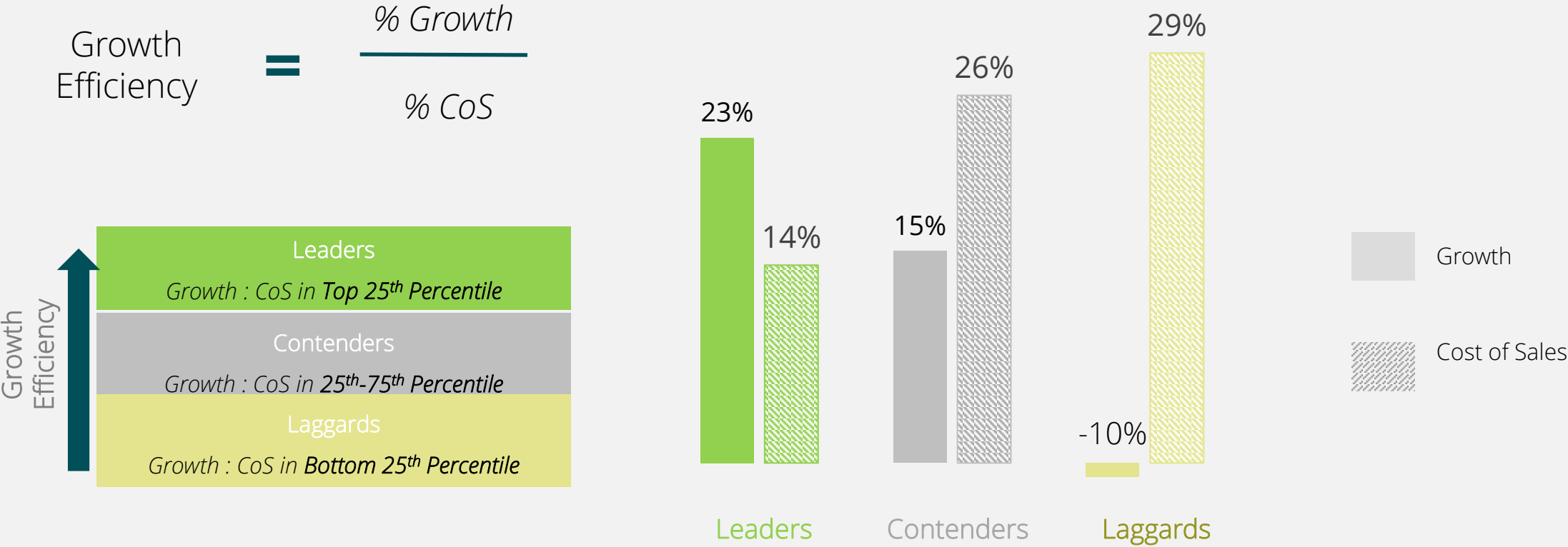
EXECUTIVE INTERVIEWS

DATA COLLECTION

2024 PARTICIPANTS



Leaders Grew 36% Faster at 50% of the Cost



Leaders vs. Laggards

	Leaders	Laggards	Market
 Cost of Go to Market	21%	39%	33%
 Cost of Sales	14%	29%	23%
 Cost of Marketing	5%	7%	7%
 Cost of Customer Success	2%	3%	3%
 Revenue Growth	23%	10%	10%
 Revenue Ops Maturity (out of 5)	3.8	3.2	3.3
 Time Spent Forecasting (hrs)	4.7	11.7	5

2024 Leading Trends

SALES COVERAGE

4x

Leaders deploy more partner sales managers than laggards (1:1 vs. 1:4 AEs to CAMs)



REVENUE PLANNING & OPS

2/3

Two out of three companies cite enablement and fragmented sales tech as their biggest challenges

SALES TECH

85%

of companies cite user adoption and training as their #1 Sales Tech challenge



AI/GEN AI

2.5

out of 5 is the average AI maturity rating of Leaders vs. Laggards at 2.3



Leaders invest in Customer Support and Sales Enablement

	Leaders	Contenders	Laggards
<i>CSM : FS</i>	1:1	1:2	1:3
<i>Partner Sales : FS</i>	1:1 ★	1:4	1:4
<i>BDR + SDR : FS</i>	1:4	1:1	1:3
<i>Sales Engineers : FS</i>	1:1	1:1	1:1
<i>Sales Specialists : FS</i>	1:5 ★	1:4	1:1
<i>FLSM : Selling Roles</i>	1:14	1:9	1:15
<i>Sales Enablement : Selling Roles</i>	1:10 ★	1:70	1:35
<i>Sales Support : Selling Roles</i>	1:14 ★	1:31	1:98
<i>FLSM : FS</i>	1:6	1:3	1:4
<i>Renewal Sales : FS</i>	1:9	1:2	1:6
<i>Customer Support : Field Sales</i>	1:1 ★	1:2	1:10
<i>Professional Services : Field Sales</i>	1:0.4 ★	1:1	1:5

Leaders Deploy:
More Customer Success
More Partner Sales
Fewer Specialists
More Enablement
More Sales Support

Top Challenges

1

Insufficient
Resources

72%

report insufficient
resources to cover
all potential markets
or customer
segments

Challenges

2

Changing Customer
Expectations

61%

report changing
customer
expectations as a
moderate to major
issue

3

Inefficient or
Outdated Processes

55%

report inefficient or
outdated processes
for identifying,
targeting, and
servicing customers
as a significant issue

Non-Issue



Channel Conflicts
Are A Non-Issue

No significant
channel conflicts
reported

To keep up with market shifts, companies are shifting the way they Go To Market



Significant changes to GTM models

100%

of Leaders rate their selling motion effectiveness 6 out of 10



Increased Investment in Digital Channels

100%

of companies intend to boost investment in digital. Only 20% offer digital booking today



Shifting coverage models

73%

of companies report inefficient or outdated customer identification and service processes



Sales Tech Improvement

60%

of Leaders report inadequate or poorly implemented technology used to support sales efforts



Improvement to Training and Onboarding

60%

of companies report inadequate training and onboarding

What is Driving the Rev Ops Trend?

THEMES



Customer centricity

Enhanced customer experience becomes the focus with a shift from customer acquisition



Performance management

Promoting collaboration requires aligning on the same metrics/KPIs



Increased collaboration

A cohesive approach between sales, marketing, and customer service is required to improve the CX



Automation adoption

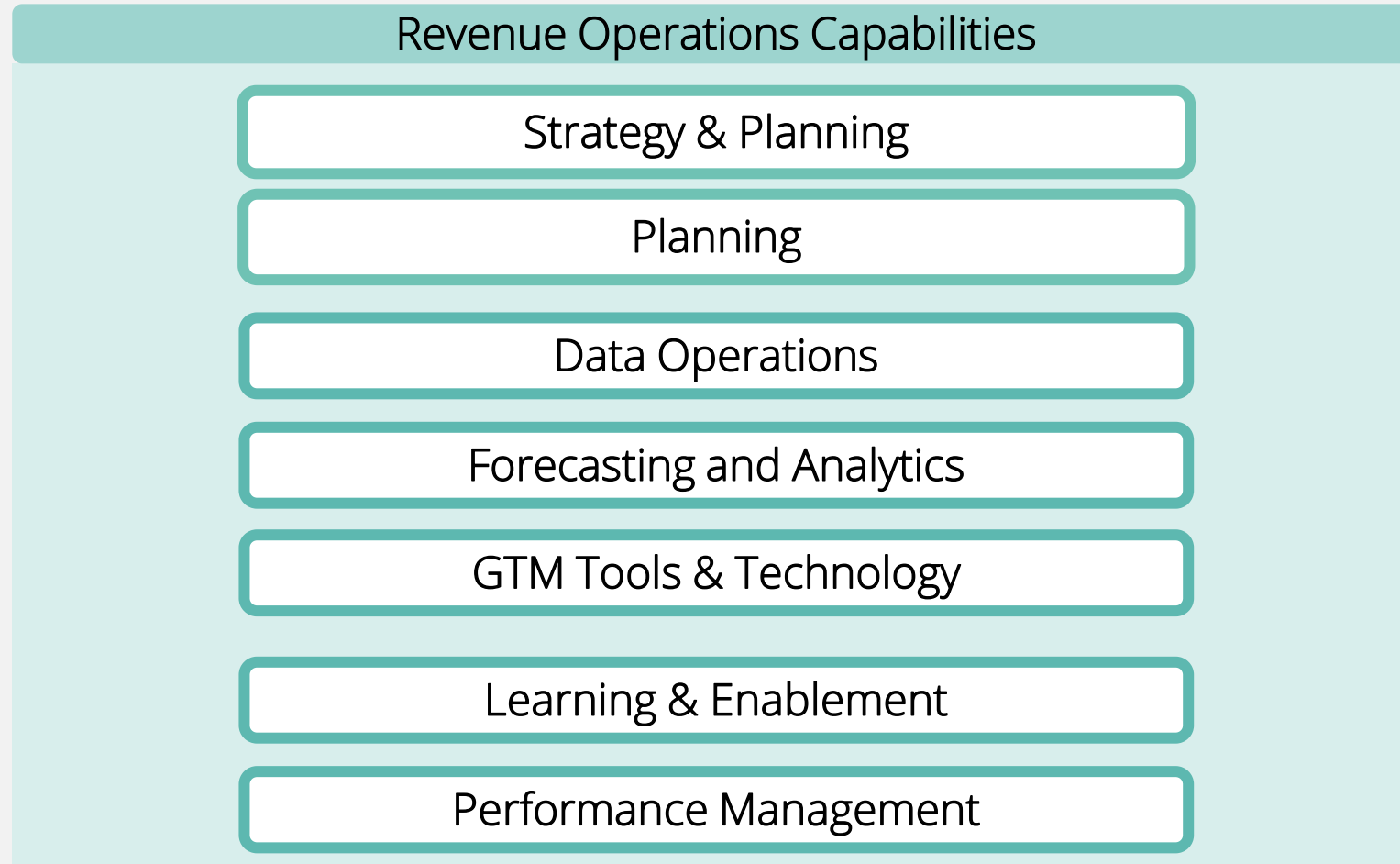
Predictive analytics, automation, and chatbots can improve planning, operations, and customer service

CHALLENGES

- **As-a-Service Business Models:** As tech companies transition to subscription-based or usage-based business models, RevOps must change to center the customer experience.
- **Inefficiencies in RevOps workflow:** according to a report by IDC, businesses lose 30 percent to inefficiencies in their revenue operations workflow.
- **Determining center for RevOps:** Each company operates RevOps from a different office depending on their strategy – CRO, COO, stand-alone department, or under Sales.

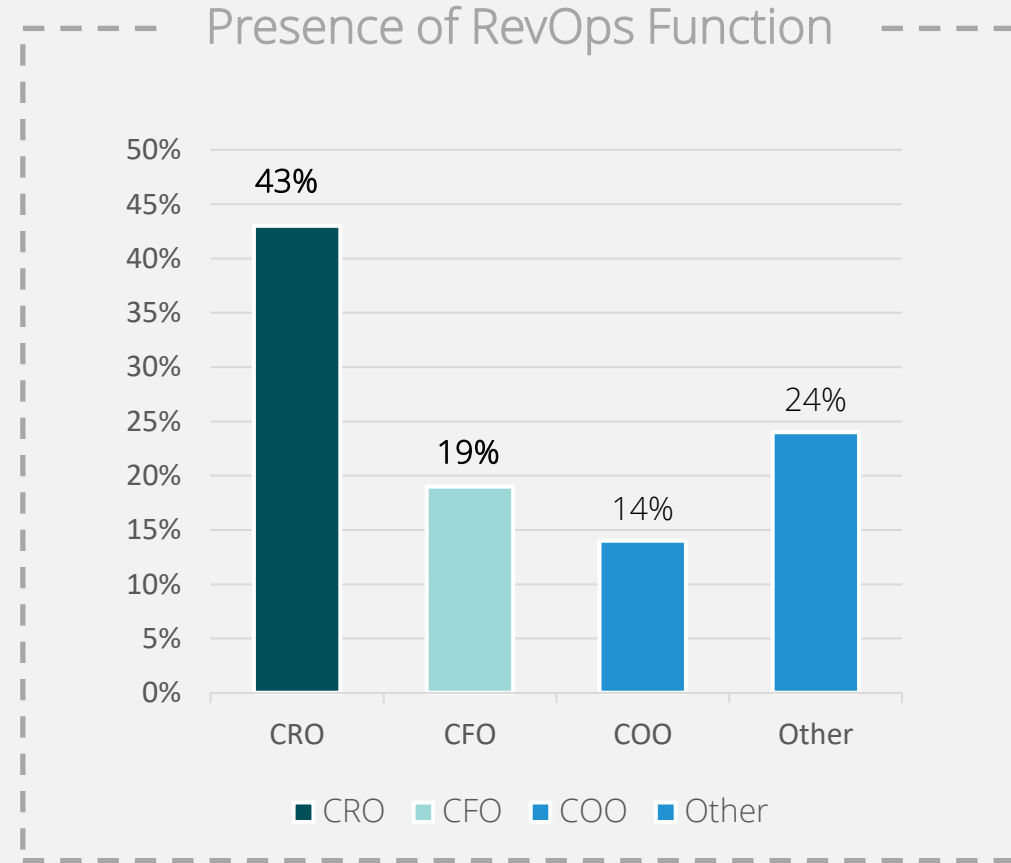
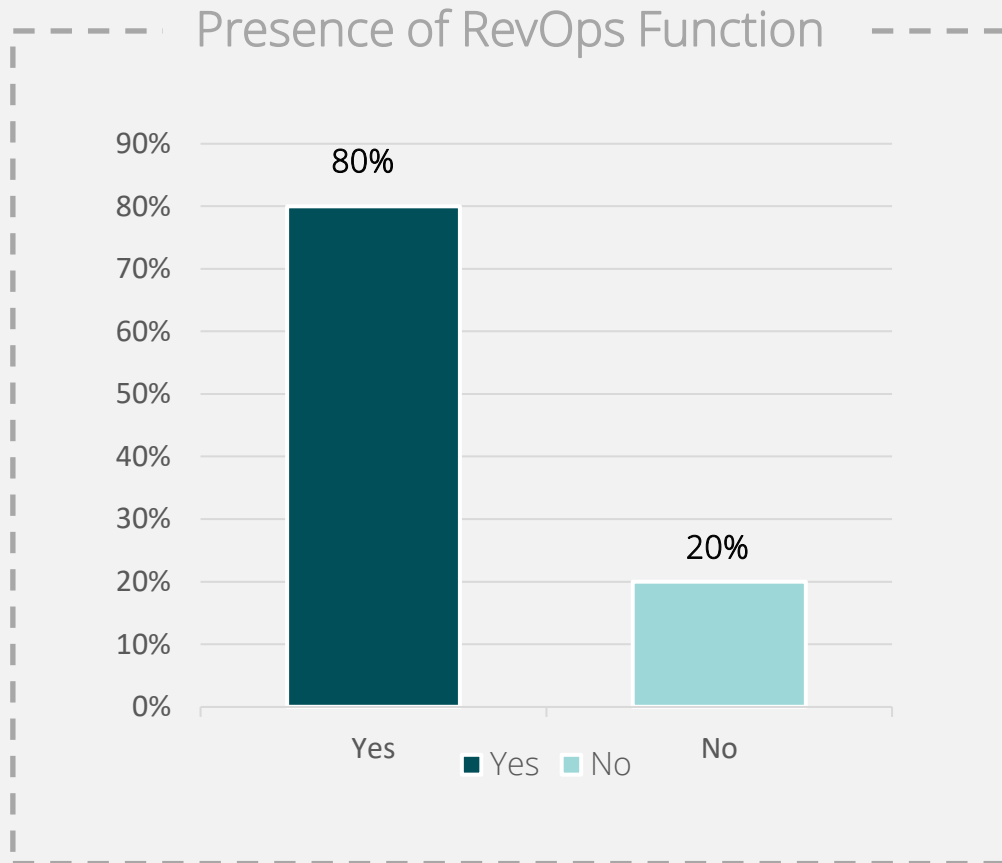
What is Revenue Operations?

RevOps centers on end-to-end GTM planning and cross-functional collaboration to provide a holistic view of the customer to all GTM teams – enabling seamless execution.



Do you have RevOps? Where does it Report?

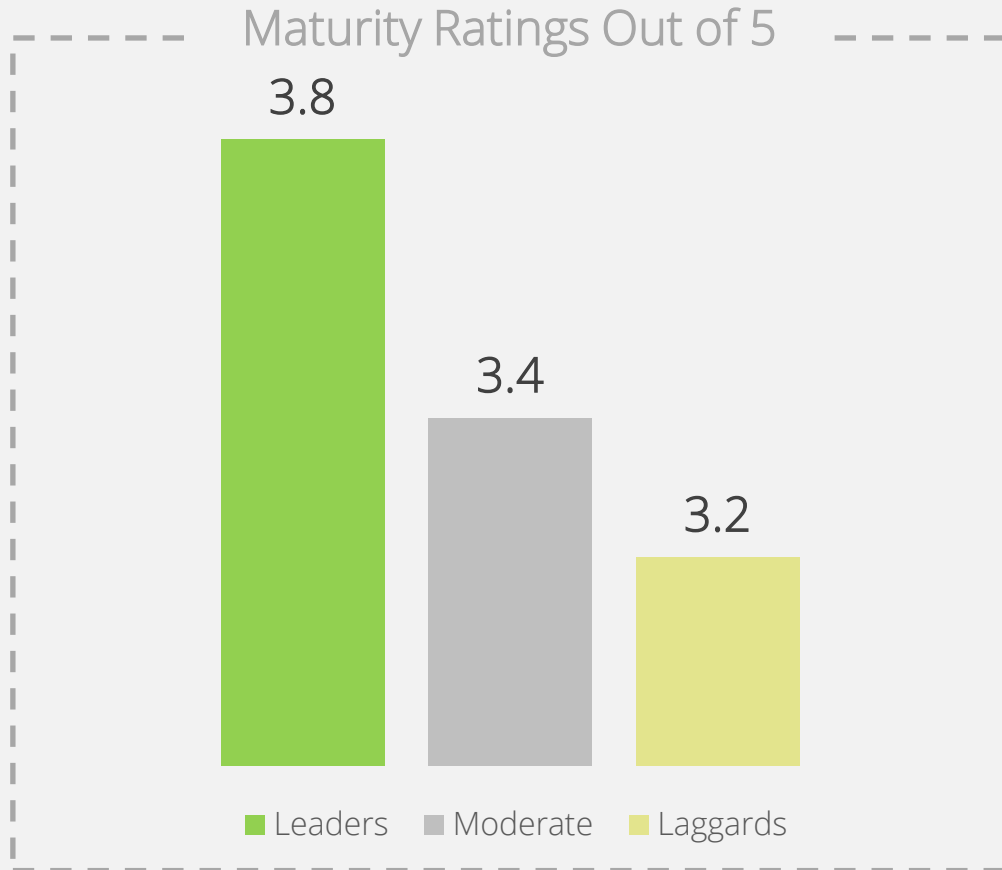
A strong adoption of RevOps signals room for growth and optimization



Companies are increasingly relying on RevOps to streamline operational processes, align sales, marketing, and customer service efforts, and drive sustainable revenue growth.

How Mature Are Your RevOps Capabilities?

RevOps maturity denotes integrated business functions, data-driven decisions, and streamlined operations for optimized revenue growth

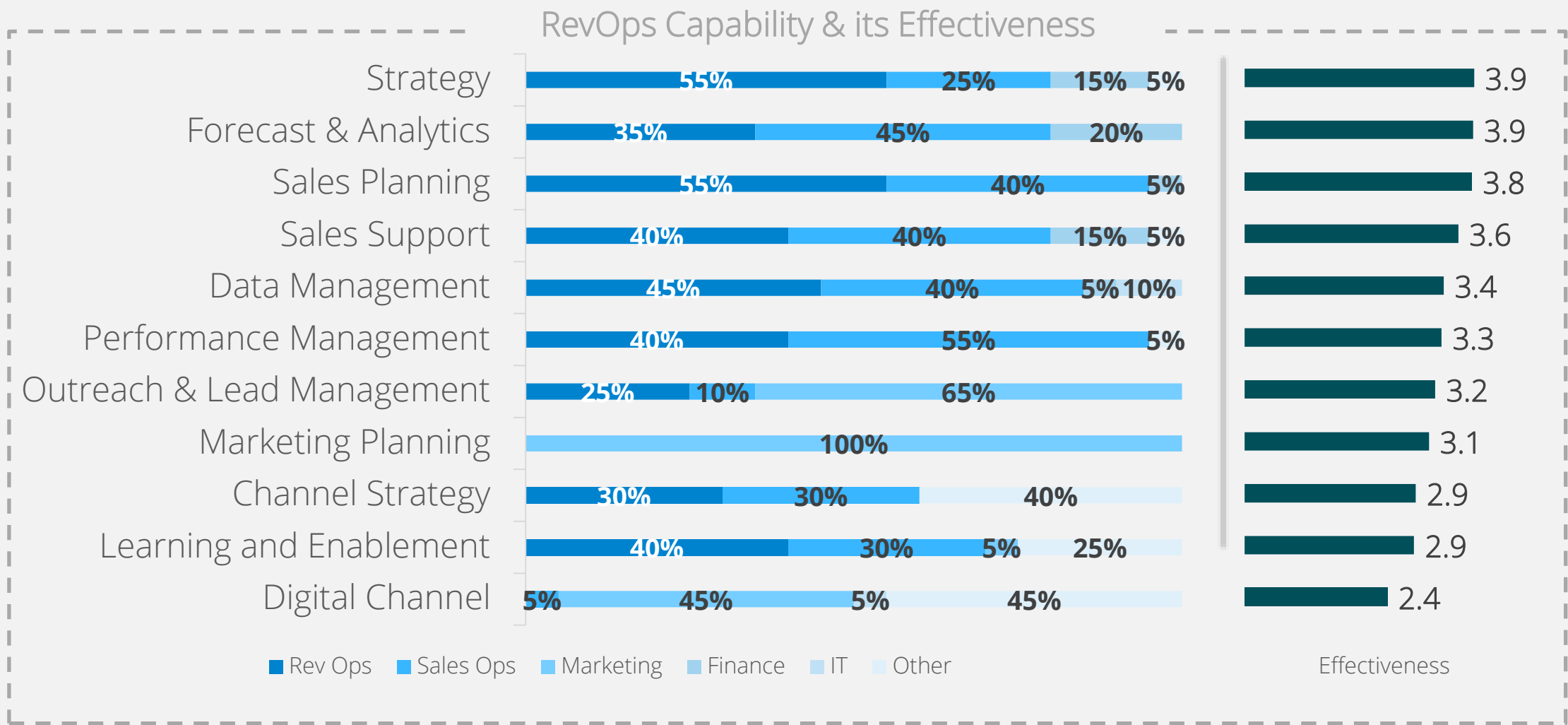


Maturity ratings of RevOps capabilities varies amongst respondents

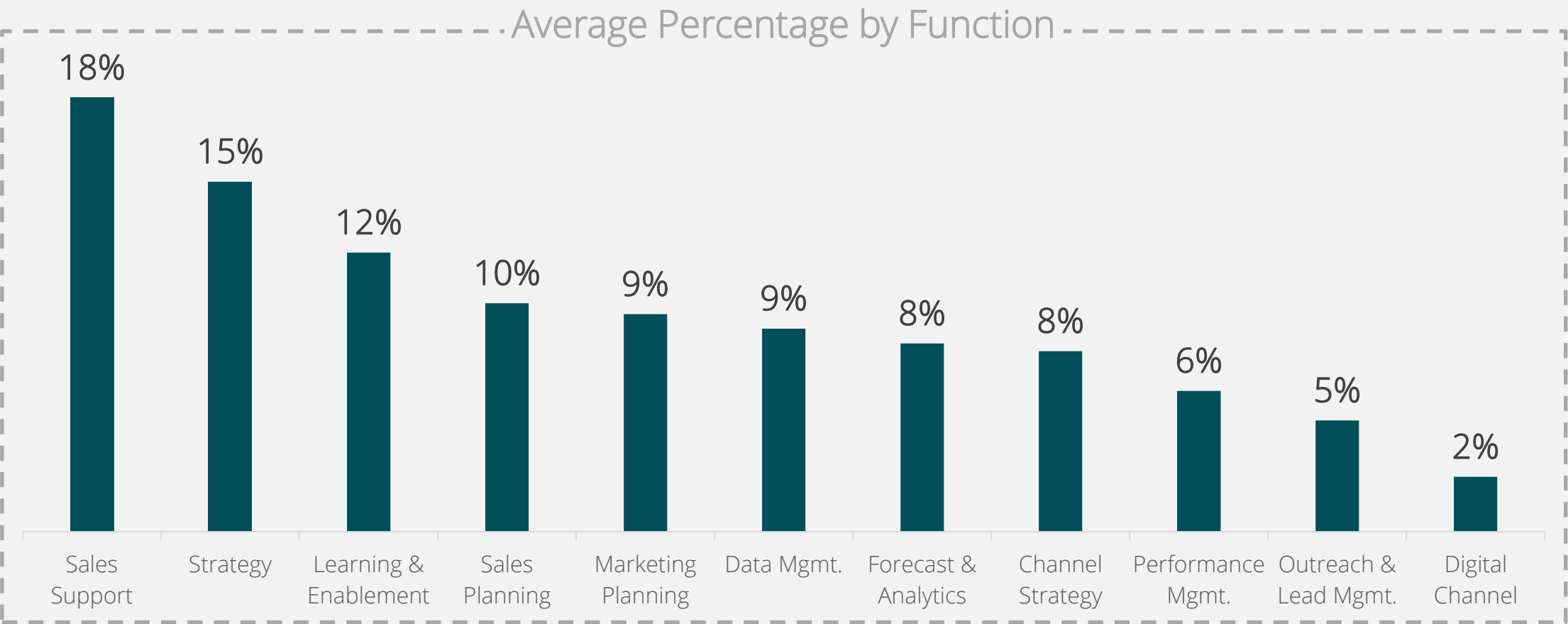


Leaders on average have higher self ratings of RevOps capability maturity than Moderate and Laggards

What Are RevOps Capabilities and Effectiveness?

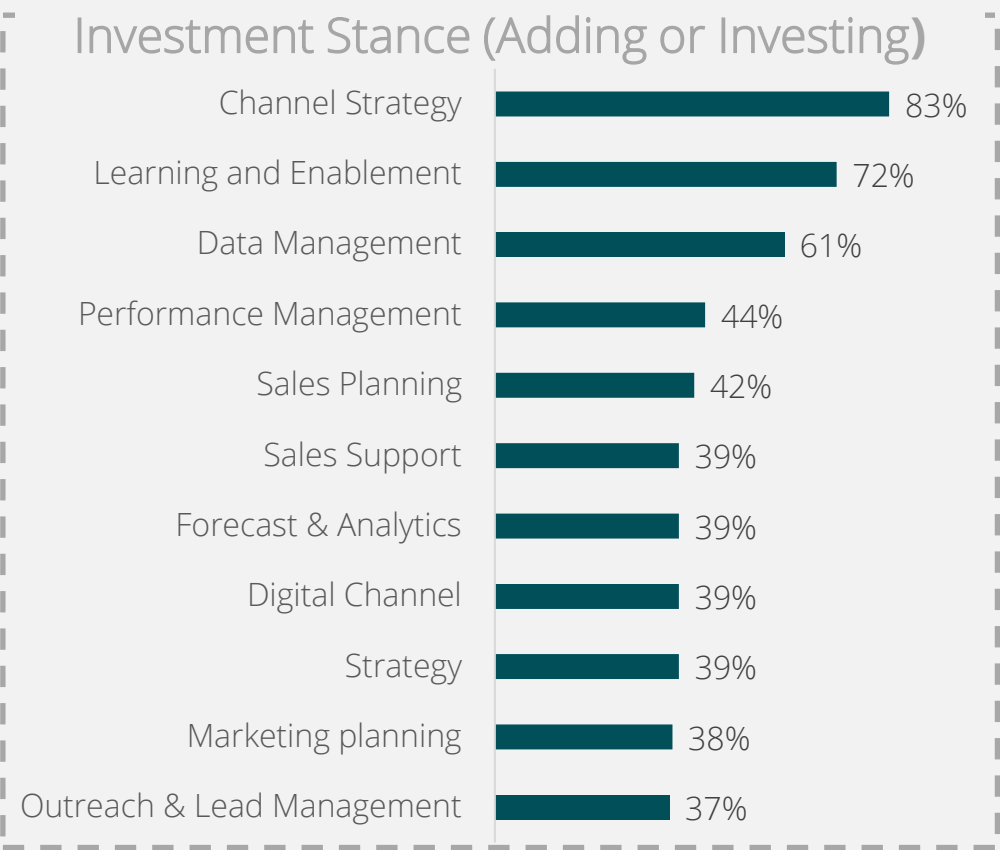


What is the Distribution of Rev Ops Headcount?



Where Are Companies Investing?

Future investments in sales capabilities are pivotal for driving revenue growth, enhancing customer relationships, and maintaining a competitive edge in the evolving market landscape

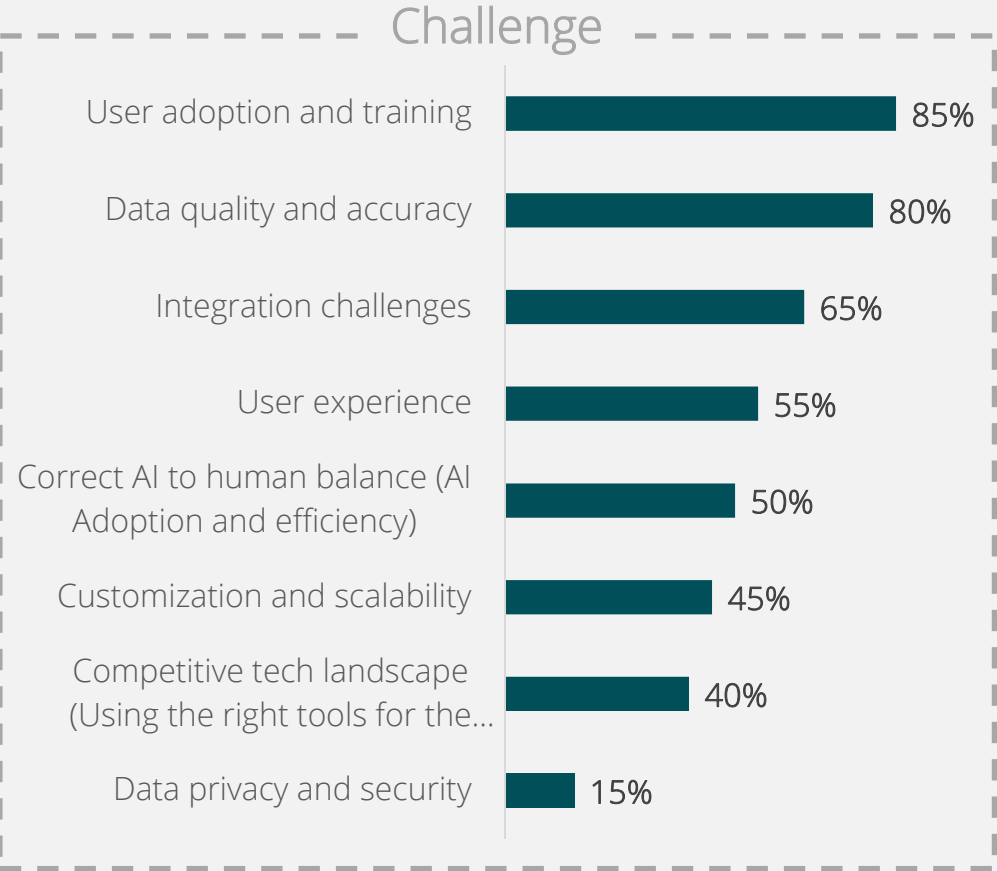


Channel Strategy and Learning & Enablement will witness the most investment this year



Companies are less likely to invest in Outreach & Lead Management and Marketing Planning

What Are the Biggest Sales Tech Challenges?



User Adoption & Training and Data Quality & Accuracy are identified as a top challenge for majority of the companies



Competitive Tech Landscape and Data Privacy & Security are less of a concern

What Are The Prevalent Technologies by Capability Area?

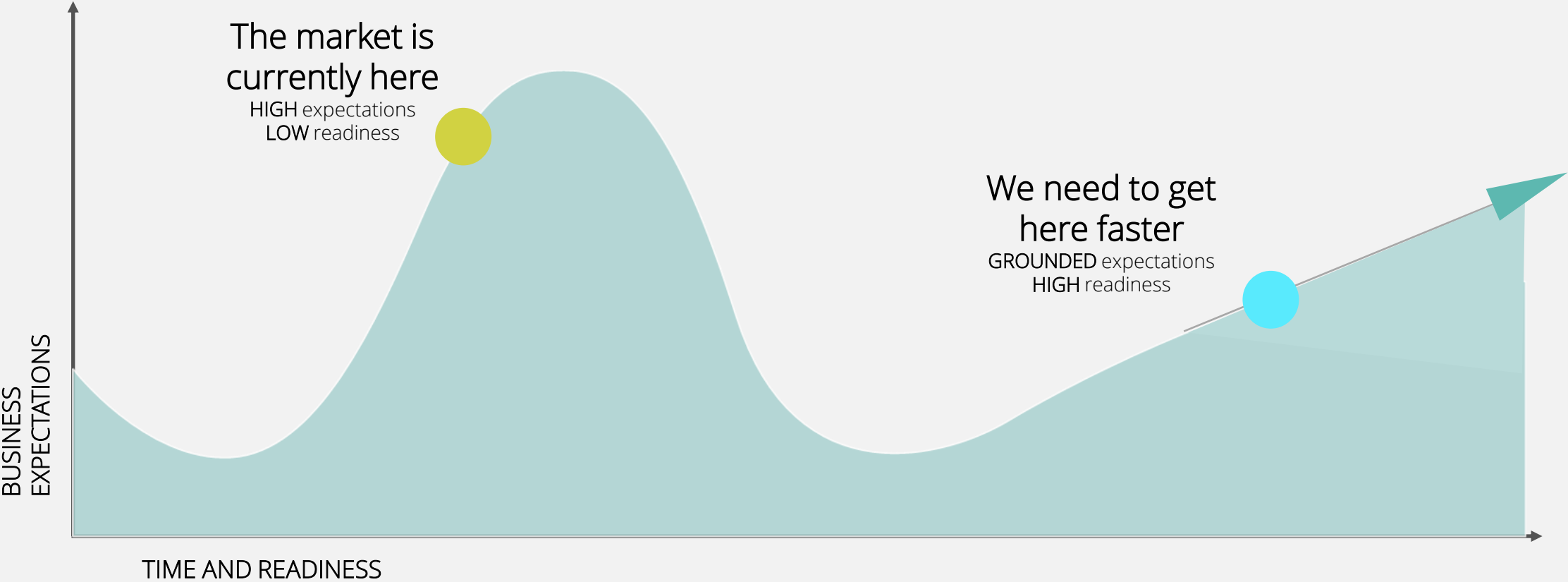
Area	Technology	% of Companies
Account Segmentation and Targeting	Salesforce	35%
Sales Capacity Planning	Anaplan	25%
Territory Design	Salesforce	40%
Quota Planning	Anaplan	30%
Incentive Compensation Planning*	Xactly	25%
Marketing Planning	In-House	44%
Trade Promotions Management	In-House	31%
CRM	Salesforce	89%
Data Integration	Snowflake	26%
Sales Forecasting	Clari	45%
Configure, Price, Quote	Salesforce	47%
Learning & Enablement	Highspot	32%
Performance Tracking and Reporting	Tableau	32%

*Seven tools mentioned here including Anaplan, CaptivateIQ, Oracle, SAP, Spiff, Varicent, and Xactly.

Where Are we With AI for Sales?

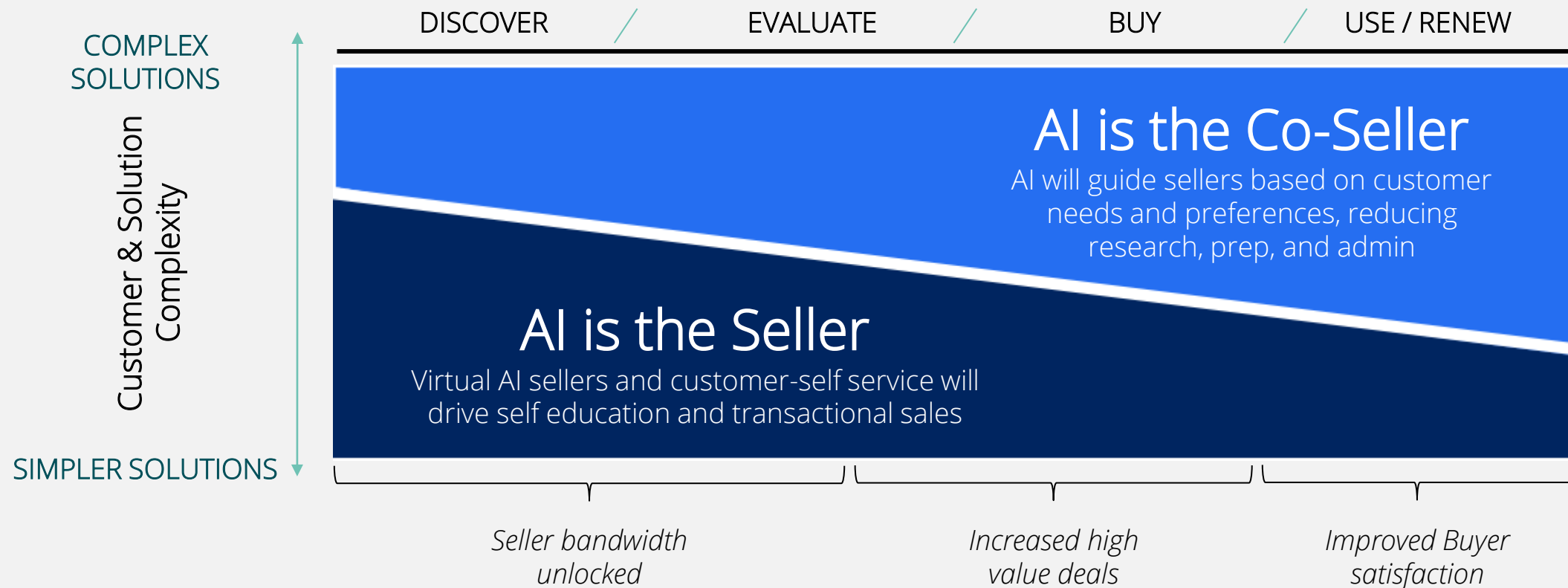
Trough of Disillusionment: Expectations overshadow complexity

AI for Sales Innovation Curve



As a result...

AI will lead or co-sell across the end-to-end customer journey



AI capabilities that enable this *AI for Sales* future



ACTIVITY CAPTURE

- Contacts and calendar
- Sales-led interactions (e.g., emails, meetings, IMs)
- Customer engagement (e.g., content download, events)
- Deal notes, actions, and stages



PREDICTIVE SCORING

- Account and relationship scoring and insights
- Deal scoring based on intent, propensity, interactions, profile, etc.
- Recommendation and predictive engines (e.g., sales planning)



SALES CO-PILOT

- Prompt-based assistant
- Research and meeting preparation
- Communications and engagement automation
- Content search and recommendations



RELATIONSHIP INSIGHTS

- Relationship mapping
- History and profile summaries
- Recommendations to deepen and expand



CONVERSATION INTELLIGENCE

- Call transcripts, summaries and actions
- Meeting assist (e.g., objection handling, questions to ask, content)
- Customer sentiment, feedback, and insights



GUIDED ACTIONS

- Playbook automation with Next Best Action
- Product, solution, and configurations
- Deal structuring
- Value calculation and summarization



PROPOSAL GENERATOR

- Content selection, generation, personalization, editing, and assembly
- Compliance, branding, and quality review



DYNAMIC PRICING

- Price sensing, prediction, and optimization
- Discount workflow and decision automation



COACHING ASSISTANT

- Personalized development programs
- Simulation-based coaching
- Learning libraries
- Sales enablement analytics and insights



DATA & AI FOUNDATION

- Unified Marketing, Sales, and Success data model
- Zero-ETL
- Data limits and transparency
- LLM, RAG, and Prompt Orchestration

Top Use Cases & Concerns Amongst AI / Gen AI

TOP 3 USE
CASES

CONCERNS &
MATURITY

OVERVIEW

SELLERS

- #1 Automate lead prioritization & customer segmentation / profiling
- #2 Voice-to-text to transcribe meetings, update CRM, prompt follow-ups
- #3 Recommend next best actions & strategies to mitigate leakage

REVOPS

- #1 Optimize territories & sale quotas & build personalized forecasts
- #2 Generate sales training / certification program content tailored to sellers' role, preferences, etc.
- #3 Share skill-building recommendation based on CI

CUSTOMERS

- #1 Power self-serve experience on web or micro-site to support customers' initial exploration
- #2 Generate personalized, timely comms for customers
- #3 Curate self-serve training for customers on purchases



SECURITY



BIAS



CONFIDENTIALITY



ETHICAL USE

LEADERS VS. TOTAL

13
Leaders

19+
Laggards

75+
Total

2.2
Leaders

2.6
Laggards

2.8
Average

GTM AI / Gen AI use cases deployed for sales today

Leveraging AI / Gen AI Maturity Level

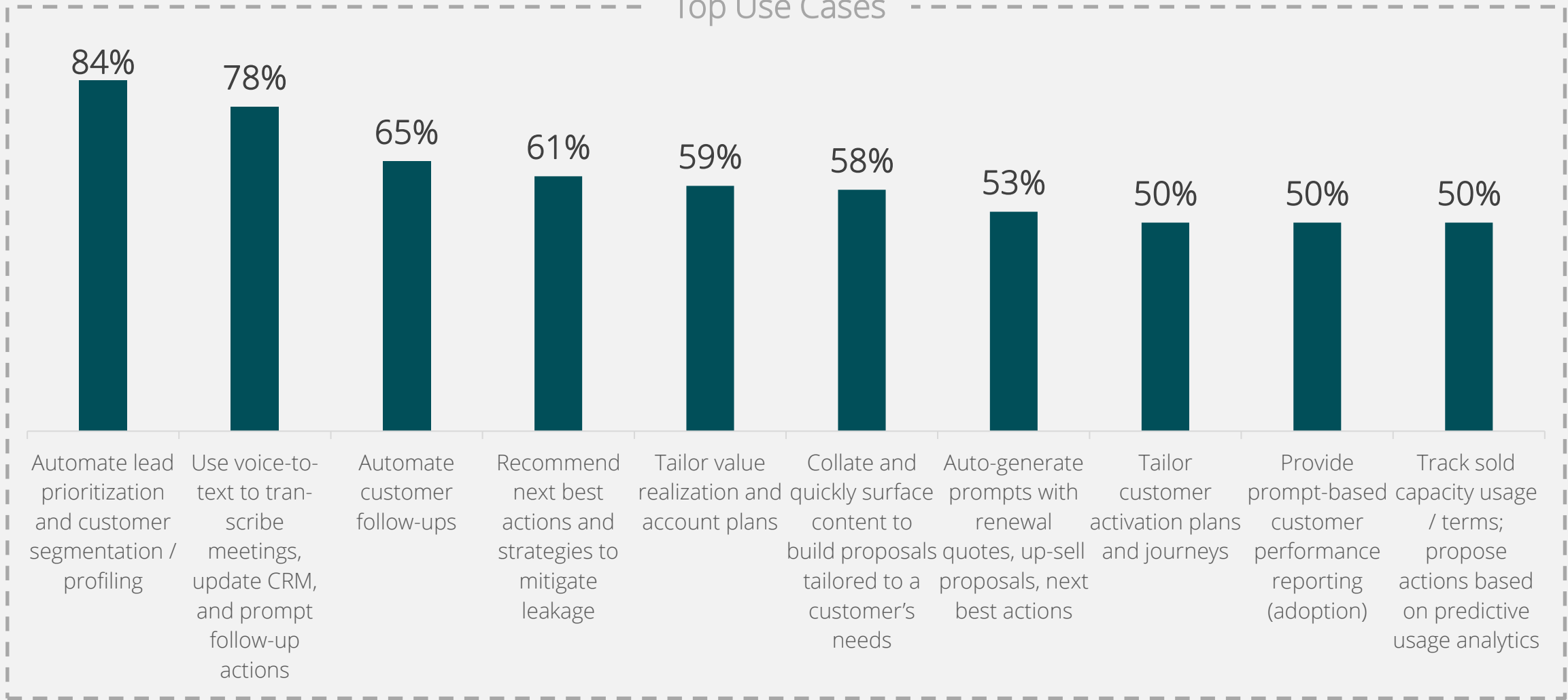
List of AI/Gen AI Use Cases Reported

Use Cases

Automate lead prioritization and customer segmentation / profiling ★	Guide sellers to create customer quotes, incl. product / pricing recommendations	Industry, market, customer research ★	Create tailored trouble-shooting guides for issues with products and services	Propose tailored, optimal product / service mix	Provide customers visual quotes (architecture diagrams)
Use voice-to-text to transcribe meetings, update CRM, and prompt follow-up actions ★	Automate contract creation and review / redlining	Personalize sales incentive plans and enable sellers to resolve deal credit / comp inquiries via self-service	Propose tailored, optimal product / service mix	Power self-serve experience on web or micro-site to support customers' initial exploration	Automate value realization reporting ★
Auto-configure trial licenses	Provide prompt-based customer performance reporting (adoption)	Suggest training content for a seller's role, skill gaps, etc.; enable self-service for technical questions on content	Power self-serve experience on web or micro-site to support customers' initial exploration	Generate personalized, timely comms for customers	Curate self-serve training for customers on purchases
Recommend next best actions and strategies to mitigate leakage ★	Automate customer follow-ups ★	Generate sales training / certification program content tailored to sellers' role, segment, learning preferences, etc.	Generate personalized, timely comms for customers ★	Support self-serve trials with digital assistant (help select trial, address Q&A, optimize usage, etc.)	Curate customer adoption / change mgmt. plan, comms
Tailor customer activation plans and journeys	Tailor value realization and account plans ★	Share skill-building recommendations based on conversational intelligence (e.g., surface tips on customer objection handling) ★	Support self-serve trials with digital assistant (help select trial, address Q&A, optimize usage, etc.)	Use customer profile to generate pricing / discounts	Propose ways to optimize use of products / solutions
Collate and quickly surface content to build proposals tailored to a customer's needs	Track sold capacity usage / terms; propose actions based on predictive usage analytics	Analyze seller actions / data to create insights, prompts, and sales strategies, sent to sellers via relevant format ★	Use customer profile to generate pricing / discounts	Enable customer self-serve quoting based on their issues, tech specs, etc.	Power digital assistants; escalate to live help as needed ★
Auto-generate prompts with renewal quotes, up-sell proposals, next best actions	Generative email, ticket segmentation, ticket auto-response, Contact identification, Contact enrichment, Engagement triggers/alerts ★	Optimize territories and sales quotas and build personalized forecasts ★	Generate personalized / optimized renewal offers	Generate future roadmap and outlook reports	Use customer profile to generate pricing / discounts

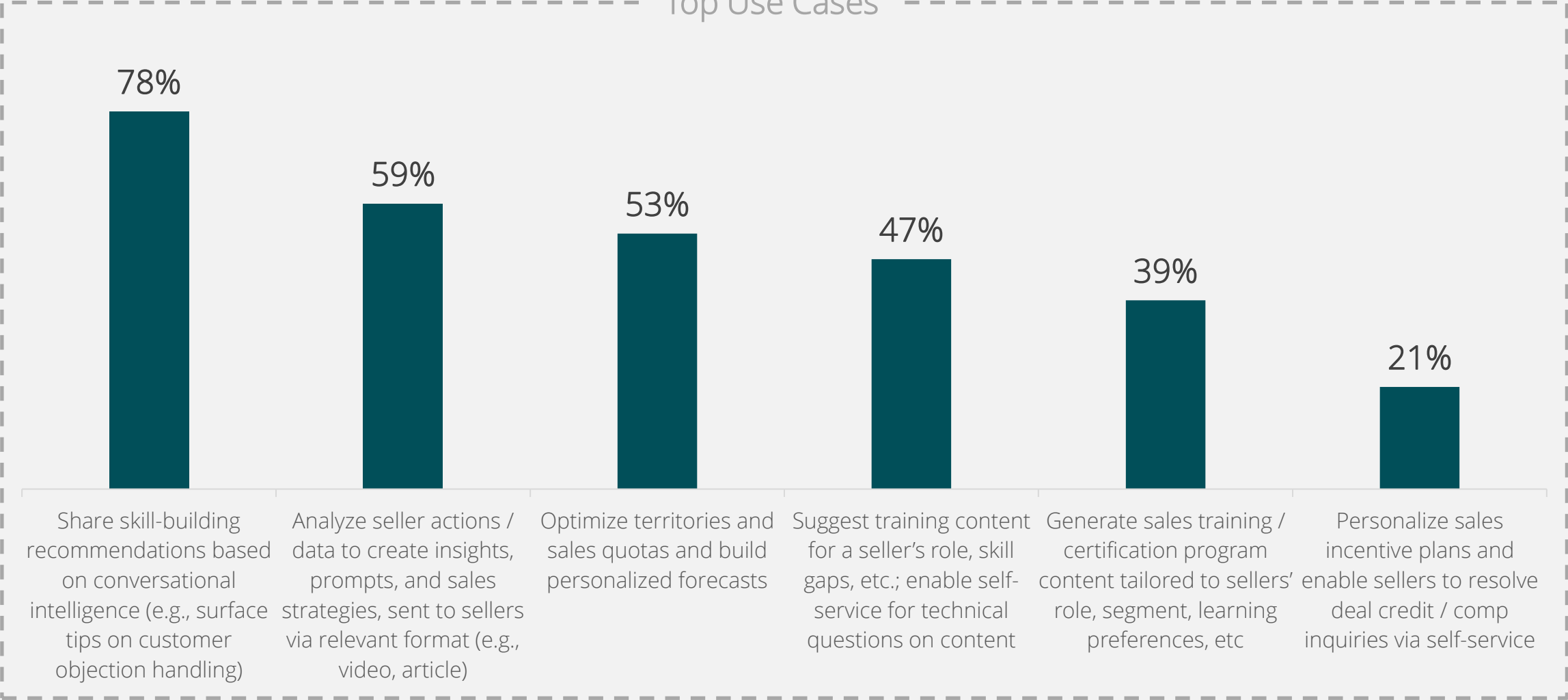
Seller AI/Gen AI Use Cases

Top Use Cases



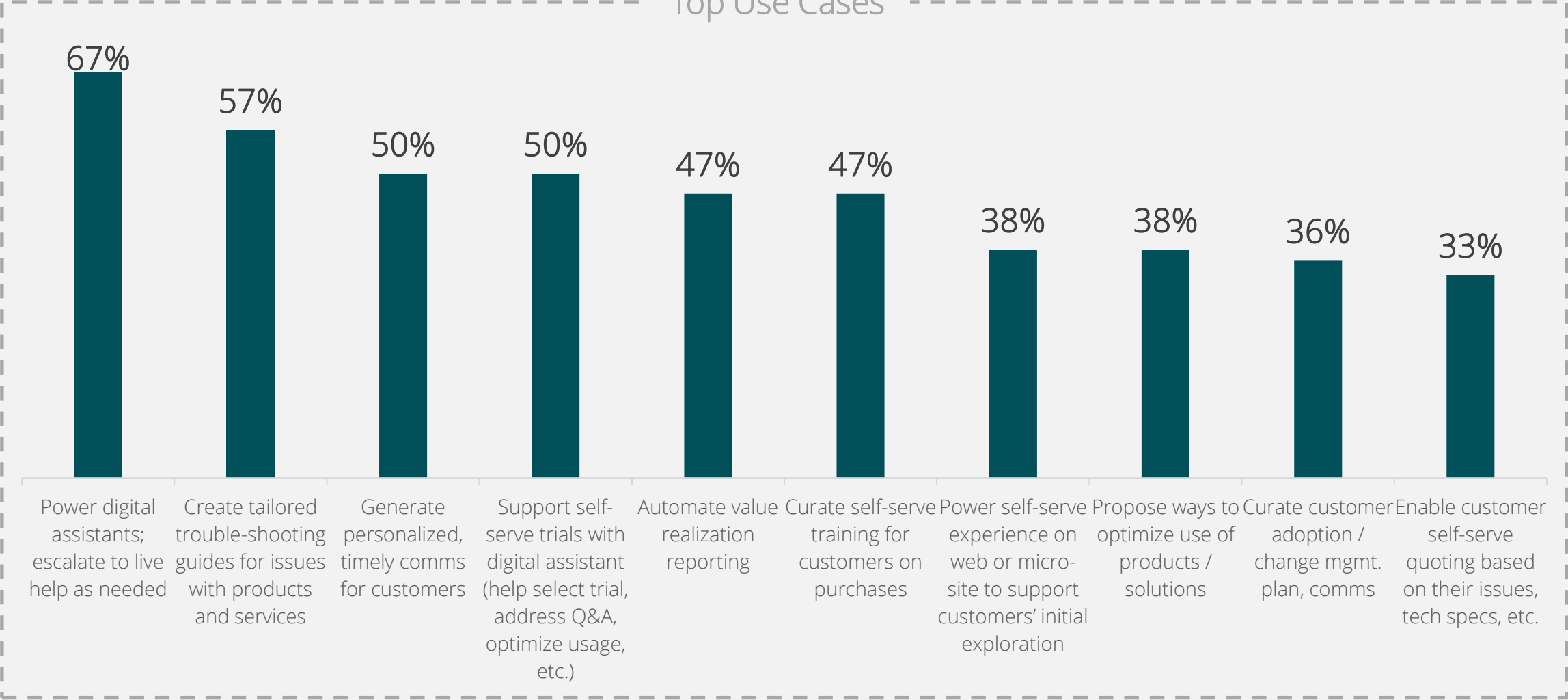
RevOps AI/Gen AI Use Cases

Top Use Cases



Customer AI/Gen AI Use Cases

Top Use Cases



Thank You

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