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SALES & MARKETING MANAGEMENT

SPECIAL REPORT

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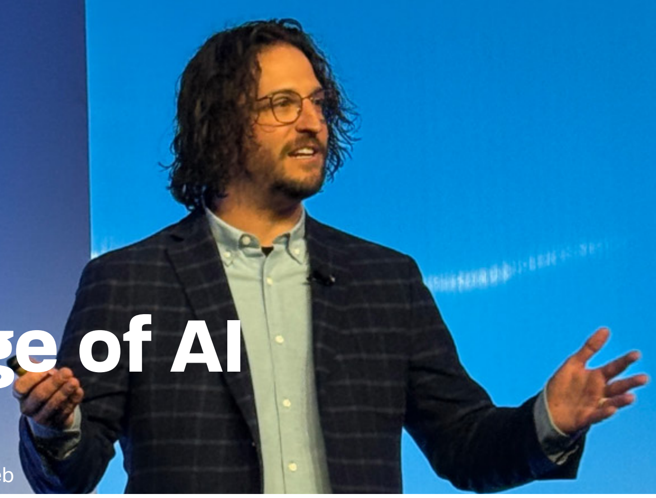
Leading Strategically In the Age of AI

Reimagining Sales Productivity In the Age of AI

BY PAUL NOLAN



Dan Gottlieb

A year ago, at the Gartner CSO and Sales Leader Conference, Dan Gottlieb, vice president analyst for the Gartner Sales Practice, emphasized to attendees of his conference-opening keynote that if they didn't commit to developing a system to scale the functionality of AI within their overall sales strategy, they'd find themselves lagging competitors with a slim chance to catch up.

This May, on the same Las Vegas stage, Gottlieb delivered a similar warning with a caveat: "AI is not the hero of this story. It is just the accelerant of whatever system you're dropping it into," he said. "If you're dropping it into a system that hasn't been redesigned, it's not going to deliver a breakthrough, it's just going to give us faster chaos."

Gottlieb confessed, "I get it – this is the pitch you've sat through 12 times in the last 18 months, including from me on this stage a year ago. The problem is that so many of us are failing the same productivity trap, even with AI."

Pursuing AI Clarity

Sales leaders who are pressured to justify their company's investments in AI should pause, reassess their operating model, and put AI-savvy workers in charge of designing an A-to-Z process that maximizes the time savings and other benefits that AI tools produce, Gottlieb said.

Gartner research shows that one-fourth of B2B sales teams are seeing a 50% or higher return on AI investment while one-fifth are experiencing a 50% or higher negative return on AI spend.

"That's a barbell of winners and losers pulling away from each other fast," he said. "This isn't a rep performance story. This is a systems story. The winners have built a model and the losers have bought a tool. And if you're struggling to measure AI ROI, you don't even know which part of this barbell you're on yet."

The breakthrough, Gottlieb said, comes from answering one key question: How do we confront the constraints that cap our output using AI so we can push the boundaries of what's actually possible? "That reframe makes you and your people the heroes, not AI," he added.

5 Constraints

Gottlieb identified five constraints that show up repeatedly across industries as forces that silently stall what salespeople are capable of:

- Demand Ceilings – You can't hustle your way into more pipeline than what actually exists.
- Decision Quality – Productivity leaks one decision at a time. Currently, there is no way to operationalize the judgment of your best people.
- Manager Bandwidth – Managers are a critical node in the seller performance equation, but it's the most chaotic job in sales. The default becomes inspection instead of intervention.
- Quality Work – Our systems struggle to distinguish between good work and busywork.
- Infrastructure to Create and Manage Capacity – Without the right infrastructure, every improvement is temporary; expertise trapped in people's heads and every new AI tool you adopt starting from scratch.

"Infrastructure is our unlock," Gottlieb said. "Own it, and you unlock everything that comes next. If you have a strong data and context infrastructure first, your competitors are going to feel it before they even understand what hit them."

Thus, putting the right people in place to design the most effective AI infrastructure is vital, yet Gartner has discovered that only 28% of sales organizations are hiring dedicated AI talent. "That number tells me two stories: The innovators are moving, but there is still a window to get a real advantage, but it's closing fast," Gottlieb said.

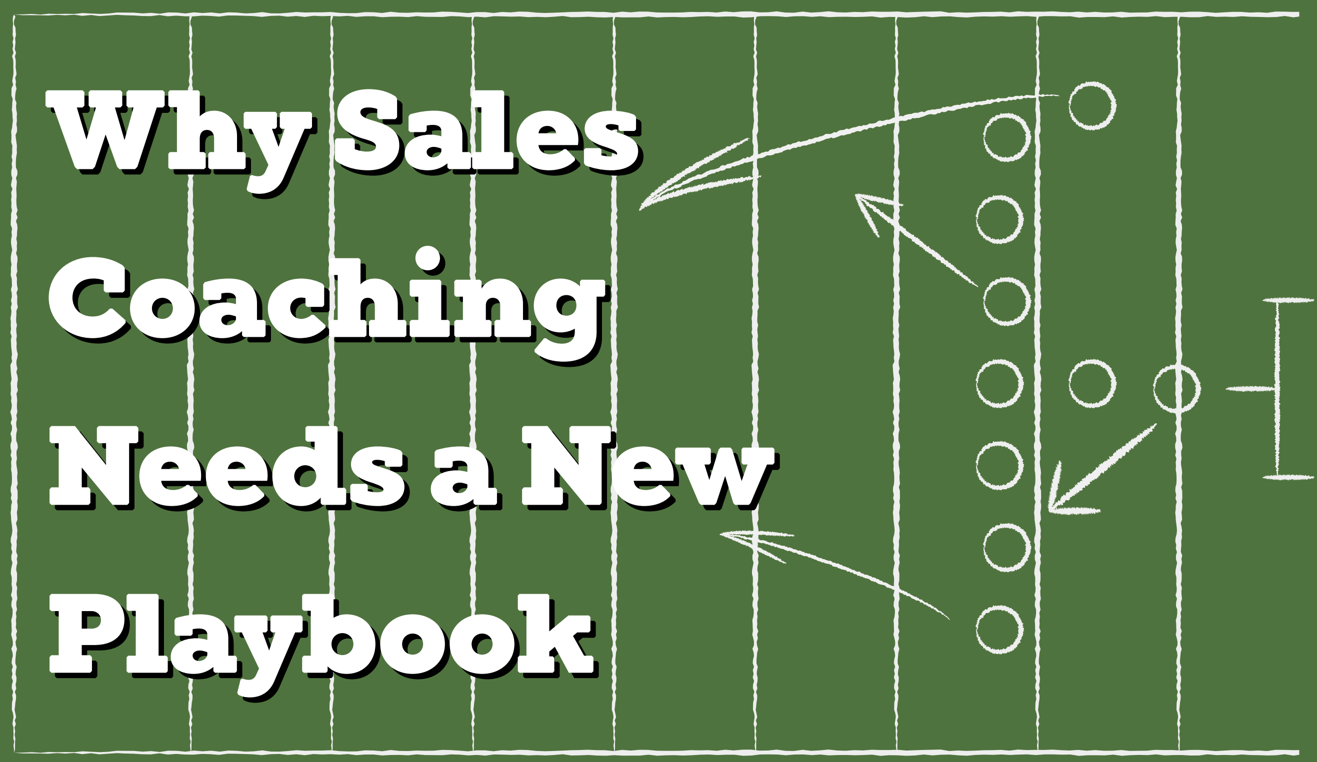
Your Power Is Your People

Gottlieb's keynote and multiple other presentations at this year's Gartner Sales Leader Conference emphasized that the secret to efficiently deploy AI tools is putting the right people in place to create a smart AI infrastructure.

"Across every metric that matters – pipeline generation, data-driven decision-making, customer retention, customer growth, revenue growth – the innovators are pulling away," Gottlieb said. "They're not working harder than you. They're not hiring faster than you. They're not buying more tools. They are innovating on their operating model.

"The next frontier of sales leadership is going to belong to those that own their own data and context, orchestrate behaviors that win, and measure the capacity AI creates. When we do these things, productivity stops being a vibe. It stops being a hope. It becomes something that you can design on purpose, where the capacity of people and AI is greater than the capacity of people alone."

Why Sales Coaching Needs a New Playbook



The goal is not to coach more, but to coach with intent.

BY RACHAEL BUCHLER, GARTNER SALES PRACTICE

Sales organizations are under growing pressure. Revenue targets are higher, margins are tighter and buying cycles continue to lengthen. Many teams are still finding ways to hit the number, but performance is becoming harder to sustain. One of the clearest signs of strain sits in the middle of the organization: the frontline sales manager.

Most leaders agree that managers are critical to results. Far fewer have modernized how managers coach. Gartner research shows that only a small minority of sales managers believe they lead high-performing teams, even though most organizations identify frontline management as essential to revenue performance. Many sales teams remain dependent on a handful of top sellers to carry bookings. When success relies on heroics rather than consistency, risk builds quickly.

The issue is not that managers are not coaching. It's that they are coaching everyone, on everything, all the time.

Equal Coaching Doesn't Drive Equal Performance

Many managers distribute seller coaching time evenly across their teams, believing fairness leads to improvement. In reality, equal coaching produces uneven returns.

Manager time is scarce and valuable. Treating it like a blanket activity spreads its impact too thin. High-performing teams recognize that coaching should be focused where it can deliver the greatest performance lift. The goal is not to coach more, but to coach with intent.

That requires managers to be selective. Not every seller needs coaching at the same time. Some sellers are receptive and capable of applying feedback quickly. Others may struggle with motivation, role fit or fundamentals that coaching itself will not fix. Concentrating effort on sellers who can absorb and apply coaching most effectively strengthens bench depth and reduces reliance on top performers. It also frees managers to address performance challenges directly when coaching is not the right solution.

Skill, Will and Coachability Matter More Than Tenure

A modern coaching approach begins by evaluating the following factors beyond surface-level performance outcomes: skill, will and coachability.

Skill reflects whether a seller has the capabilities needed to execute in role. Will reflects motivation and commitment. Coachability determines whether the feedback given translates into actual changed behavior. Sellers may accept advice, but do they act on it consistently?

These distinctions are important because coaching is not performance management. When managers attempt to solve disengagement or chronic underperformance through coaching alone, they waste time and frustrate both sides. Effective managers separate coaching for growth from conversations that reset expectations or clarify role fit.

Prioritizing coachability helps ensure that coaching time produces real improvement rather than surface-level agreement.

What Effective Managers Coach

The strongest managers focus coaching where behavior directly influences results: mindset, deal judgment and win-driving behaviors.

Mindset shapes how sellers interpret risk and opportunity. In complex buying environments, sellers often rush to pitch due to a belief barrier of needing to prove value fast. Coaching mindset helps sellers slow down, reshaping how to diagnose customer problems and engage buyers more productively.

Deal judgment determines how sellers decide their next move. Weak judgment shows up when sellers mistake buyer interest with buyer readiness, advancing deals without clear buyer ownership or validated evidence. Coaching judgment improves decision quality earlier in the sales cycle, when outcomes are still changeable.

Win-driving behaviors are the high-causal habits of top performers that consistently improve sales results. By coaching these behaviors, such as early stakeholder multithreading across sellers' execution routines, managers drive repeatability instead of one-off advice.

The Real Unlock Is the Manager

The most overlooked element of sales performance is the frontline manager's ability to translate insight into action.

AI, analytics and dashboards do not change seller behavior on their own. Managers do. Gartner research shows that managers who use data to focus coaching on the highest-impact opportunities are more than four times as likely to exceed expected profit growth. Yet, only a small portion of frontline managers primarily use data to guide coaching discussions. Sales organizations must present information in a consumable, actionable way so managers can apply it in the right context and drive clear next steps for sellers.

Coaching That Scales Performance

Sales complexity is not going away. Teams that continue to rely on hero sellers and generic coaching will struggle to scale. Those that succeed will empower managers with a new coaching playbook that treats time as a strategic asset, focuses on capability over activity, and intervenes when leverage is highest.

Coaching does not need to be louder or more frequent. It needs to be sharper, more selective and better timed. When managers coach with precision, they do more than improve individual performance. They build resilience into the entire revenue organization. smm

Rachael Buchler is a senior director analyst in the Gartner Sales Practice who presented live on this subject and others at the Gartner CSO & Sales Leader Conference.

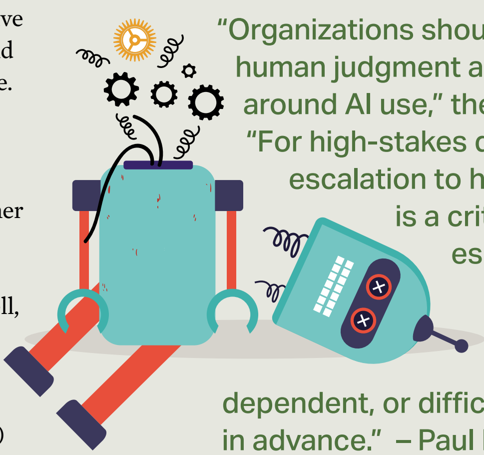
AI Still Needs HI (Human Intelligence)

There may come a day when artificial intelligence tools drive every aspect of B2B sales, but for now, human judgment and experience remain a vital component of generating revenue.

A study reported on in the summer issue of MIT Sloan Management Review discovered that generative AI, when serving as a consultative tool for entrepreneurs, can boost performance, but only when the entrepreneur uses his or her own judgment to distinguish good AI advice from bad.

On its own, AI does not typically handle the nuanced elements (the "messy realities") of managing a business well, the researchers found. In fact, the research found that AI negatively impacted business operations when an entrepreneur wasn't savvy enough to realize the recommendations generated by AI (such as reducing price) were unwise.

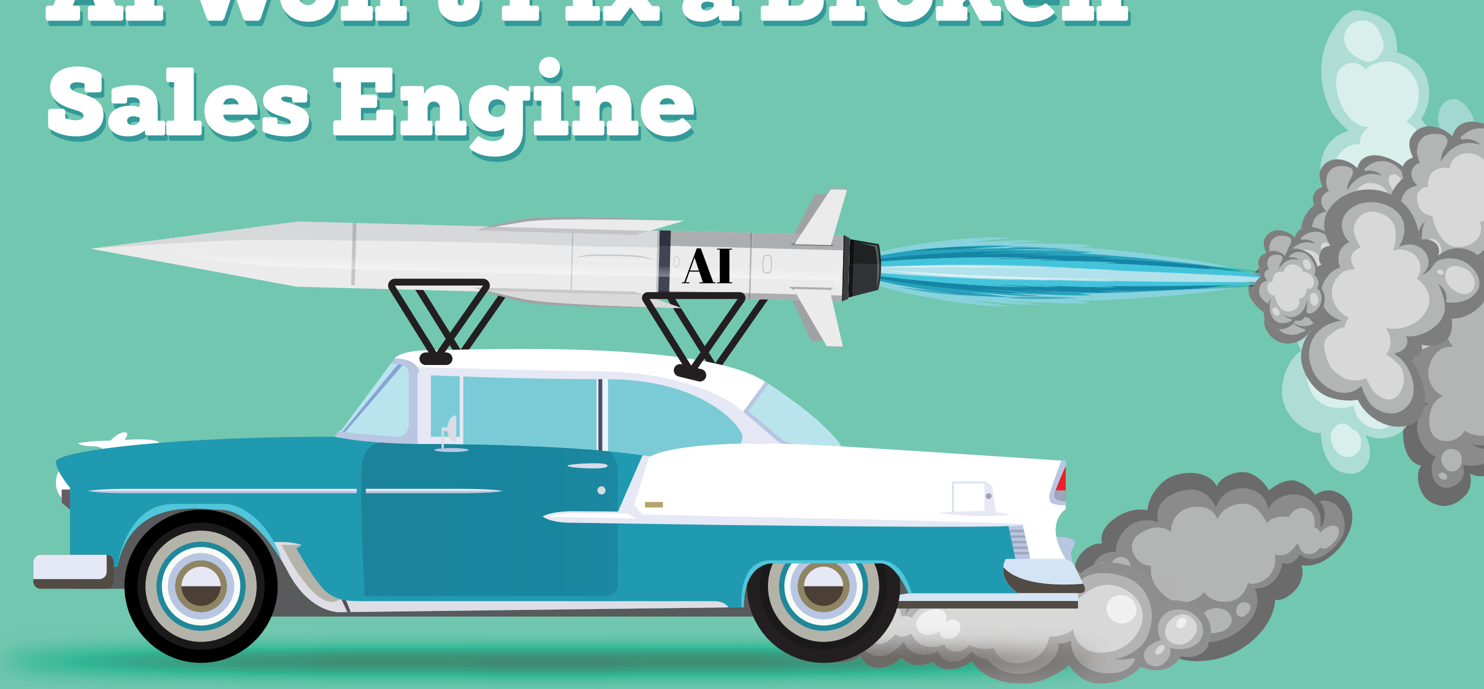
"In open-ended contexts, a positive effect of AI on performance relies on asking good questions, interpreting suggestions, and choosing which actions to implement. For users with strong judgment, the tool helps surface new ideas and think through trade-offs. Users with weak judgment can end up following plausible-sounding but misleading advice that leads to worse outcomes," the researchers write.



"Organizations should also invest in human judgment and scaffolding around AI use," the authors state. "For high-stakes decisions, escalation to human support is a critical safeguard, especially when advice is open-ended, context-dependent, or difficult to evaluate in advance." – Paul Nolan

In the study, which involved hundreds of small businesses across a wide range of industries in Kenya, those that had access to generative AI increased revenues and profits by 15% among owners who had already been doing well. However, among those businesses that were in the bottom 50% in their industry before the study, AI use led to a nearly 10% decline in revenues and profits. smm

AI Won't Fix a Broken Sales Engine



The goal is not to accelerate every step of the sales process, but rather to redesign it.

BY DOUG BUSHÉE, GARTNER SALES PRACTICE

Sales leaders are under pressure to prove that AI can create real commercial impact. The promise is compelling: faster workflows, more seller capacity, better decisions and more scalable growth. Yet many organizations are discovering that adding AI to the sales process does not automatically make selling better.

That is not because AI cannot create value. It can. Gartner research shows that AI tools save sellers an average of 4.8 hours per week, even after accounting for time spent validating AI results. But the same research shows that 72% of sales leaders report low reinvestment of those AI-driven time savings into high-value sales activities.

That is the reinvestment gap. AI is giving time back to the sales organization, but the legacy revenue engine is quietly taking it back.

The same approval loops remain. The same forecast rituals remain. The same proposal bottlenecks remain. The same manager inspection habits remain. AI gets inserted into old motions, but the operating model does not change.

The result is predictable. Sales organizations become busier before they become better.

AI-First Sales Is Not AI-Added Sales

Many organizations are using AI to summarize calls, draft emails, populate CRM fields and generate insights around the edges of the sales process. Those use cases can save time, but they rarely change the system.

If sellers still spend too much time coordinating internally, managers still chase updates and deals still wait in pricing, legal or security queues, then AI has only accelerated pieces of a constrained system.

That distinction matters. The goal should not be to automate every legacy step. The goal should be to identify which steps should disappear, which paths should be redesigned and where human judgment matters most.

If leaders do not retire low-value work, AI will automate bureaucracy. If they do not redesign bottlenecks, AI will help deals move slightly faster through the same slow path. If managers remain activity auditors, AI will produce more information than the organization knows how to use.

That shift requires workflow redesign, role redesign and a more disciplined operating rhythm.

Replace Constraints, Don't Accelerate Them

Most sales organizations are trying to extract more productivity from systems that have already reached their ceiling. They look for incremental gains in seller admin, forecasting, proposal creation or deal review.

But AI-first growth requires a different question: Which constraint is limiting speed, quality and capacity at the same time?

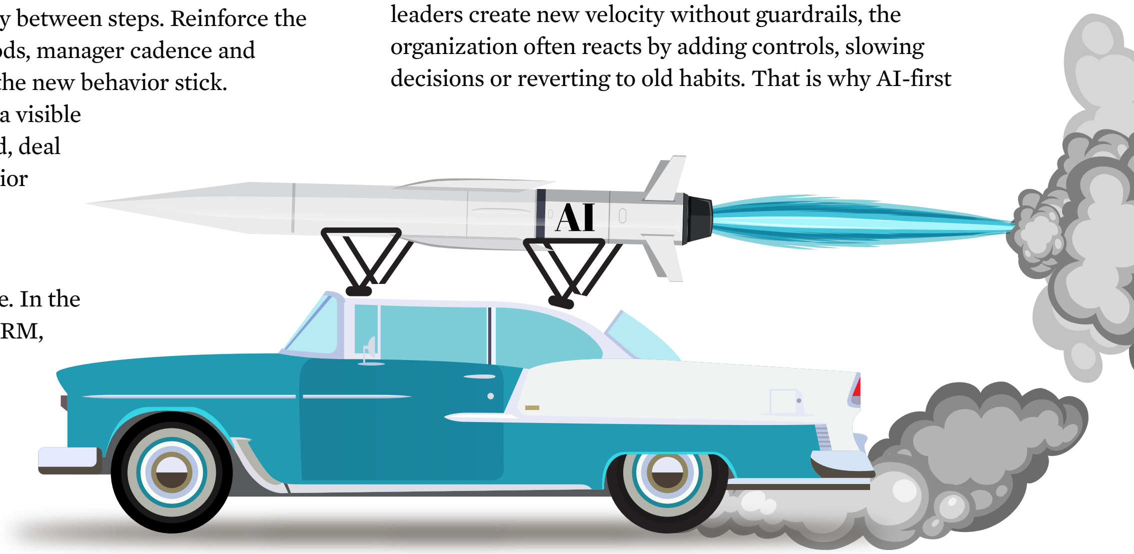
Three constraints show up repeatedly. The first is capacity. Too much seller and manager time leaks into low-value administrative work, process coordination and internal reporting.

The second is deal flow. Good deals often stall not because the seller is ineffective, but because the deal gets trapped in proposal, deal desk, security, legal, pricing or approval friction. In other words, revenue waits inside the system.

The third is operating rhythm. Even when a new workflow is introduced, old manager habits, inspection metrics and shadow processes pull the organization back to familiar routines.

Sales leaders should attack these constraints directly. Run sunset sprints to retire legacy motions that consume time without improving decisions. Bypass barriers so high-value deals do not wait unnecessarily between steps. Reinforce the rhythm through innovation pods, manager cadence and inspection metrics that make the new behavior stick.

Each move should produce a visible business result: time reclaimed, deal friction reduced or new behavior sustained and scaled.



Retire Forecast Theater

Forecasting is a useful example. In the legacy model, sellers update CRM, managers chase accuracy, teams roll up spreadsheets and leaders spend meeting time repeating status in different formats. Then someone creates the recap deck, and the cycle repeats again the next week. That is status work – work that describes the deal but does not move the deal.

In an AI-first model, the system assembles the baseline view automatically, including deal changes, risk signals, confidence shifts and commit volatility. Human time is then reserved for exceptions, deal risk interpretation and intervention decisions.

The manager conversation shifts from status questions to decision questions:

- Which deal deserves our focus?
- Who must change their mind to move this forward?
- What risk do we act on now?
- What action changes the deal trajectory?

The forecast still exists. What disappears is the theater around it.

That is the broader principle: Stop spending time describing the deal and start spending time changing the deal.

Build Bypasses for the Bottlenecks

Some of the biggest delays in sales do not sit inside a seller's workflow. They sit between teams. A deal can have strong buyer interest and still lose momentum because it is waiting on proposal assembly, pricing approval, legal review or security clearance.

These are deal flow constraints. They are the places where revenue gets stuck.

An AI-first approach should not focus only on helping each function work slightly faster. It should redesign the path so more work happens in parallel, routine preparation is preassembled, and human attention is reserved for exceptions. A deal does not need to take the old route just because the old route exists.

Make Speed Resilient

Speed without resilience creates burnout and backlash. When leaders create new velocity without guardrails, the organization often reacts by adding controls, slowing decisions or reverting to old habits. That is why AI-first change must be reinforced, not assumed.

The sales organizations that get AI right will not be the ones that buy the most tools. They will be the ones that diagnose the real constraint before adding technology. They will retire work that no longer improves decisions, bypass bottlenecks that slow strong opportunities and reinforce new habits until they stick.

AI can help sales organizations move faster. But speed only matters if it moves the right system. The real opportunity is not to add AI to every step of the sales process. It is to redesign the sales engine so AI improves capacity, decision quality and growth. smm

Doug Bushée is a vice president analyst in the Gartner Sales Practice who presented live on this subject and others at the Gartner CSO & Sales Leader Conference.

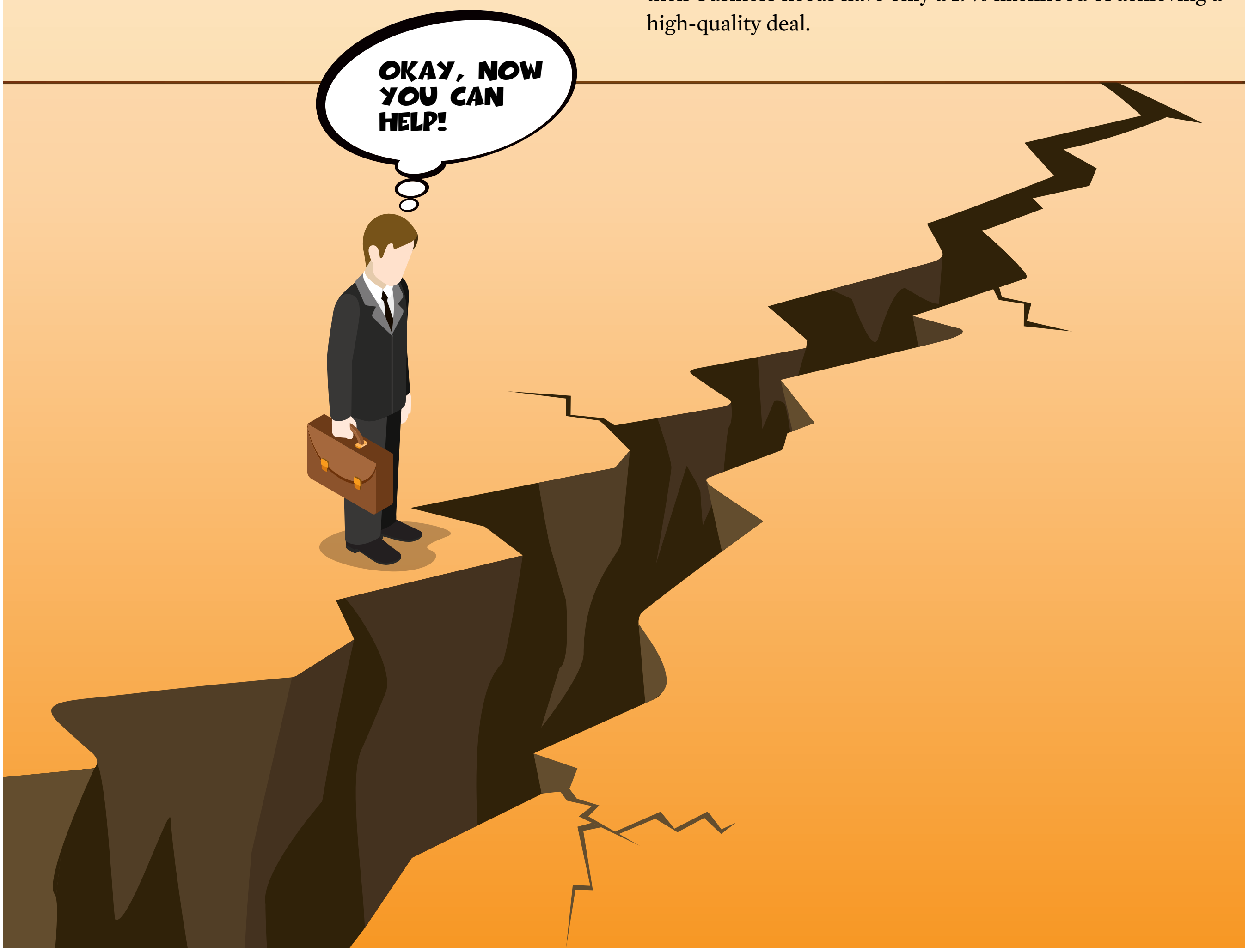
Why Winning Sales Teams Are Letting Buyers Take Control

Winning Deals Isn't About Being First, It's About Showing Up When It's Most Helpful

BY ALYSSA CRUZ

For years, sales organizations were taught that early engagement was everything. The faster a rep could get in front of a buyer, the better the odds of shaping demand, influencing requirements and advancing the deal. That playbook no longer reflects how B2B buying actually works. Today's buyers want space before they want a salesperson. When suppliers fail to recognize that shift, they do more than annoy prospects — they actively reduce their odds of winning high-quality deals.

The modern B2B buyer is increasingly self-directed. In Gartner research, 67% of B2B buyers said they prefer a completely digital, rep-free buying experience. That does not mean sellers are irrelevant. It means the seller's role has changed. Buyers still need human support, but not at the beginning of the process and not in the form of generic discovery calls or premature outreach. In fact, buyers who first engage with a seller before they have clearly defined their business needs have only a 19% likelihood of achieving a high-quality deal.



No Messaging Is Better than Wrong Messaging

For chief sales officers and revenue leaders, this is the real inflection point: the issue is no longer whether to digitize parts of the customer journey. It is whether the commercial organization is willing to abandon the assumption that seller access equals seller value. In many cases, it doesn't. Buyers increasingly treat early-stage seller contact as friction, particularly when outreach is irrelevant or disconnected from their actual buying task. Gartner found that 73% of B2B buyers actively avoid doing business with suppliers that send irrelevant messaging.

This should force a rethink of how sales teams are deployed, measured and enabled.

The best sales organizations are not asking how to get sellers involved earlier. They are asking how to make seller intervention more precise. That starts with recognizing that buyers leave a trail of signals long before they raise their hands. Website visits, repeat engagement with diagnostic tools, content consumption across topics, and interactions by multiple stakeholders can all help commercial teams understand whether an account is simply browsing or moving toward a meaningful decision. The goal is to use those signals to time human engagement more intelligently — not to automate more noise.

Not Every Inquiry Deserves a Rep

That shift also requires a more disciplined view of pipeline quality. Not every inquiry deserves a rep. Not every account deserves to be pursued. Organizations that continue to reward activity volume over commercial fit will keep wasting seller time at the top of the funnel while starving high-intent opportunities of the support they actually need. A stronger model is to use behavioral and situational signals to prioritize the right accounts, delay outreach when buyers are not ready, and disqualify poor-fit opportunities earlier. Gartner's guidance is clear: reserve seller intervention for verified intent and deprioritize bad-fit deals rather than pushing them forward artificially.

Artificial intelligence has an important role to play here, but not in the way many companies assume. Too many organizations are using AI to scale the same low-value behaviors buyers already reject: templated outreach, generic chatbot interactions and automated pitches masquerading as personalization. Buyers are skeptical of that approach. Only 33% of B2B buyers rank supplier-provided generative AI as trustworthy.

If AI is going to improve commercial performance, it must be used to reduce buyer effort, not increase buyer suspicion. That means deploying AI to synthesize buyer context, surface relevant information, personalize resources around the buyer's specific business situation and provide transparent sourcing. It also means making it easy for a buyer to transition to a human when they are ready. Notably, 69% of B2B buyers still prefer to validate AI-generated insights with a human seller. So the opportunity is not to replace sellers; it is to preserve human intervention for the moments where it creates the most confidence.

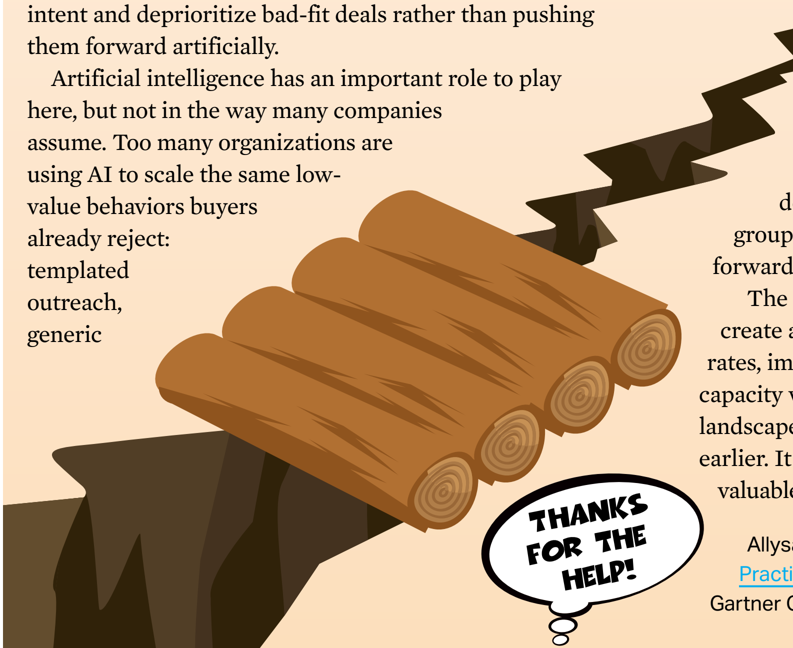
Confidence Is a Seller's Most Important Contribution

In complex B2B purchases, the biggest obstacle is often not product understanding – it's group alignment. Buying groups typically involve five to 12 stakeholders, often with competing priorities and inconsistent definitions of value. When dysfunction in that group is high, the likelihood of achieving a high-quality deal drops to just 5%. This is where sellers still matter enormously. But their job is no longer to push a message. It is to validate choices, reduce perceived risk, frame value in business terms and help the buying group build consensus.

That is why the era of the "persuader" is ending and the era of the "verifier" is beginning. Sellers who excel at value framing lead to high-quality deals for 67% of buyers, while sellers who focus on value affirmation drive high-quality deals for 75% of buyers. Those are not small gains. They point to a fundamental commercial truth: the seller who wins today is the one who helps buyers feel confident, informed and in control.

For sales leaders, the mandate is clear: Rebuild engagement models around buyer readiness, not internal stage gates. Use signals to determine when human outreach is warranted. Deploy AI to support objective discovery, not automate interruption. And retrain sellers to step in as decision validators – the people who help buying groups clarify trade-offs, resolve disagreement and move forward with conviction.

The organizations that adapt to this model will not only create a better buying experience. They will protect win rates, improve pipeline quality and focus scarce seller capacity where it has the greatest impact. In the modern B2B landscape, winning more deals is no longer about getting in earlier. It is about showing up later – and being far more valuable when you do.



Allysa Cruz is a senior principal analyst in the Gartner Sales Practice who presented live on this subject and others at the Gartner CSO & Sales Leader Conference.

AI Sales Success Depends on Partnership, Not Tool Adoption

BY DANIELLE MCKINLEY, GARTNER SALES PRACTICE

Most sales organizations have already made the strategic leap on GenAI. They have invested in licenses, encouraged experimentation and told sellers that the technology will make them more productive. Yet many are still waiting for the return.

Gartner research shows that only 39% of CSOs report that GenAI has met expectations. That should not be interpreted as a sign that the technology cannot help sales. It is a sign that many organizations are solving the wrong problem. The issue is not belief in AI. It is execution. More specifically, it is whether sellers have been taught how to work with AI as a true partner.

Too often, AI is introduced to sellers with the same corporate language that secured the investment: transformation, modernization, productivity and efficiency. Those messages may resonate in the boardroom, but they often fall flat with sellers. Sellers do not want to be transformed. They want to be unburdened. They want fewer late-night CRM updates, faster account research, better preparation and more time for the human work that actually moves deals forward.

That disconnect creates a value gap. Leaders see promise. Sellers experience another tool.

Sellers Are Already Overwhelmed

Sales teams are not operating from a blank slate. Gartner research shows that 78% of sellers feel overwhelmed by the number of skills and technologies required to do their jobs. Overwhelmed sellers are significantly less likely to hit quota or reach high productivity. When leaders add AI without connecting it to a real seller problem, the technology becomes one more thing to learn instead of a better way to work.

This is why AI rollout cannot be treated as a tool adoption exercise. It must be treated as a behavior change effort. The question is not, “Do sellers have access?” The question is, “Do sellers know when to use AI, how to guide it and how to validate the output?”

That is the difference between casual use and AI partnership.

Build Process Pros, Not Tech Prodigies

Sellers do not need to understand the architecture of a large language model. They need to know how to use GenAI in the flow of selling. That requires three practical skills.

First, sellers must identify the right use cases. AI is valuable when it removes burden from high-effort, lower-judgment work or accelerates preparation for higher-value selling moments. Meeting prep is a good example. In the traditional model, sellers spend valuable time gathering company information, reading news, reviewing contacts and synthesizing notes. With strong AI partnership skills, AI can perform much of the research and synthesis quickly, while the seller applies experience, context and judgment.

Second, sellers must learn how to prompt effectively. Prompting should not feel like programming. It should feel like a thoughtful conversation with a knowledgeable colleague. Sellers need permission to experiment, iterate and refine. They should ask follow-up questions, challenge the output, request different angles and continue until the response is useful enough to move into real work.

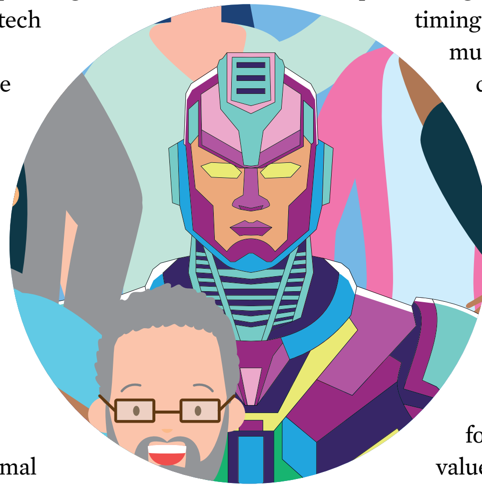
Third, sellers must validate. AI may sound confident even when it is wrong. Sellers must learn to ask for sources, check assumptions and apply professional judgment before using AI-generated content with a customer. Validation is not proofreading. It is the safety net that protects trust, relevance and brand credibility.

The Organization Has Work To Do, Too

AI partnership is not only a seller skill. It is an organizational capability.

Gartner research shows that 62% of organizations indicate neither their AI technology nor their people are ready to recognize the potential value of AI. That matters because sellers cannot build strong AI habits on a weak operating foundation. If tools do not connect to the tech stack, if data is unreliable or if leaders disagree on acceptable use, sellers will lose confidence quickly.

A cross-functional go-to-market council can help close that gap. Sales, marketing, IT, data and enablement all have a role to play. Together, they should define priority use cases, risk tolerance, data requirements, workflow integration and success metrics. AI partnership should not depend on scattered pockets of seller experimentation. Early adopters are valuable, but the goal is to turn their informal breakthroughs into repeatable practice.



Train Actions, Not Tools

Enablement teams should resist the urge to train AI as a separate system. Sellers are far more likely to adopt AI when it is tied to the actions they already perform.

Take prospecting. A broad instruction like “use AI for prospecting” puts the burden of innovation on the seller. A better approach is to break prospecting into specific actions: prioritizing accounts, researching contacts, reviewing timing signals, personalizing outreach, setting up multitouch sequences and validating qualification signals. Leaders can then identify where AI should support the work and where human judgment must remain central.

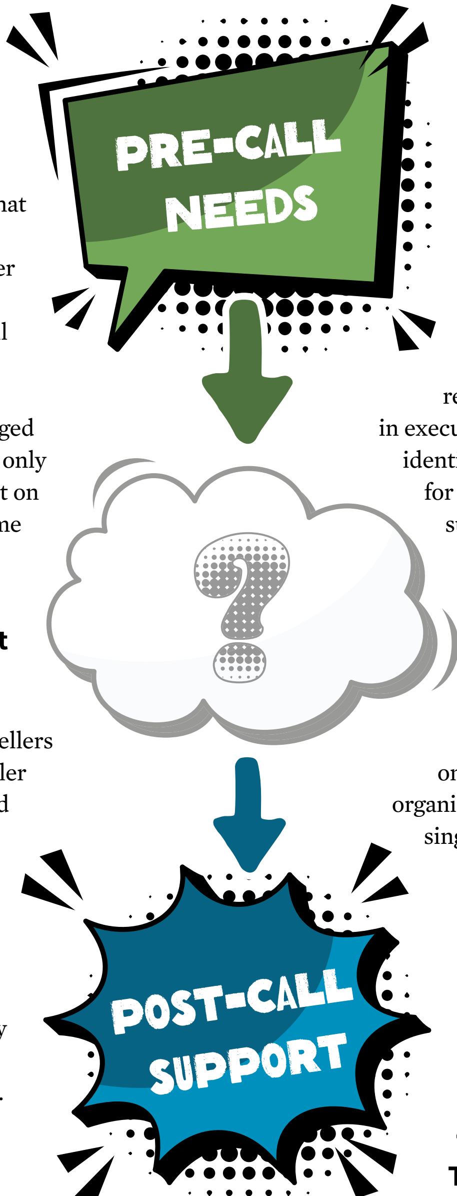
That level of specificity reduces overwhelm and improves adoption. It shows sellers that AI is not additional work. It is a better way to execute familiar work.

AI only works when the organization, the people and the workflows are ready for it. Sales leaders that want to close the value gap should stop asking whether sellers are using AI and start asking whether they are partnering with it. That is how AI moves from another tool in the stack to a real driver of seller productivity and commercial performance. smm

Danielle McKinley is a senior director analyst in the Gartner Sales Practice who presented live on this subject and others at the Gartner CSO & Sales Leader Conference.

AI Won't Fix Seller Productivity Until We Fix Timing

BY BILL YETMAN, GARTNER SALES PRACTICE



Sales organizations don't have a training problem. They have a timing problem.

Most sellers already have access to what they need. Content exists. Training exists. Tools exist. None of that is new. What's missing are interventions within moments that matter. Support shows up early in required training – months in advance of the call. After the call, support shows up in manager coaching sessions. That gap between pre-call needs and post-call support is where performance breaks.

AI, as most teams are using it, hasn't changed that. A single agent can respond quickly, but only when asked. It's still reactive. Still dependent on the seller knowing when they need help. Same failure point, but often faster. The issue isn't the resources, it's the timing.

Capacity Was Always the Constraint

Enablement has always been limited by capacity. The ratio tells the story. One enablement resource supporting 25, 40, 50 sellers or more. When that ratio is divided, each seller gets a fraction of the support they need – and rarely when they really need it. Broad coverage instead of precise intervention. Since the beginning of training and enablement, that was a baked-in tradeoff. More content nor tools solve that. Those sit on top of the same constraint; timing.

Many sales teams moved quickly to deploy AI as the next layer. The pattern is predictable. Deploy a general-purpose agent. Give it access to everything. Expect execution improvements across workflows because "everything is connected." That approach runs into the same issue as human capacity. Just in a different form.

Executing a sales call is not a single task. It is a sequence. Preparation. Diagnosis. Guidance. Follow-up. Each step depends on the one before it. Each step introduces risk. A generalist agent tries to manage all of it. It can work for simple requests but it begins to degrade as complexity increases. Generalist agents don't scale well in precision environments; errors stack and small misses compound. In a revenue workflow, increased error rates are not what a CSO wants to see. The limitation is not AI itself. It is how it is being applied.

A Shift in How Work Gets Done

The more effective pattern is narrower. Instead of one agent doing everything, work is divided across multiple agents. Each one responsible for a specific task; coordinated, sequenced and validated.

These multiagent systems, in its simplest terms, is a set of specialized agents working together under an orchestration layer. One system manages the flow, others act in defined roles and others monitor quality before anything is sent to a seller or a manager. This process mirrors how execution works in high-performing teams. The result is not just automation - its consistency in execution quality. When fine-tuned, the system identifies what matters for each opportunity and for each call. The difference is enablement support is triggered by in-the-flow-of-work opportunity context, not by seller memory and recall.

Where Most Efforts Go Wrong

There is a strong pull to scale this quickly. Apply AI across the entire sales system and try to transform everything at once. Don't make that mistake. Successful organizations find a narrower starting point. A single, repeatable, high-frequency workflow whose impact is easy to measure. A workflow that generates clear signals and exposes whether the multiagent system improves execution or not. If it does; refine and expand it. If it doesn't, scaling will only amplify the disconnect. This is less about AI adoption and more about commercial operating discipline.

The Decision Underneath All of This

There is a more fundamental choice emerging from this use-case. Keep the traditional enablement model; a service with limited reach and opaque impact. Or transform enablement into an infrastructure which is embedded in seller daily activity, triggered by context, and built for consistency.

The teams that see impact from multiagent systems are not simply adopting agents they are changing how seller performance is governed. Moving support into the workflow itself and reducing the distance between signal and action.

That is where productivity shifts. Not from knowing more but serving it up at the right time. smm

Bill Yetman is a senior director analyst in the [Gartner Sales Practice]() who presented live on this subject and others at the Gartner CSO & Sales Leader Conference.

AI, Human Intelligence, and Your Sales Strategy

Designing sales incentive programs that drive outcomes

BY SUSAN ADAMS, NEXT LEVEL PERFORMANCE

Sales incentives are a core lever for driving revenue performance, but the landscape is changing. Sales cycles are longer, buying groups are larger, and channel ecosystems are more complex. The most effective incentive programs lean into technology and emerging research in motivation to reinforce focus, shape behavior and sustain momentum. AI is providing unique, new opportunities to understand what's working and what's not.

High-performing organizations consistently turn incentives into a durable performance advantage across both direct sales teams and channel partners.

Selling Isn't Just 24/7/365. It's 360˚

The most effective incentive programs are a daily part of sales operations. Rather than acting as short-term contests or end-of-quarter accelerators, they reinforce priorities that matter throughout the selling cycle. This means rewarding progress – not just outcomes – so the entire audience understands what it takes to achieve their goals.

By targeting behaviors such as pipeline creation, training and customer retention, organizations create clarity for sales teams and channel partners alike. The result is less guesswork, more consistency and better alignment between strategy and execution. Inspiring with recognition and rewards across the whole audience earns commitment. Platforms like Next Level's Amplify provide greater visibility into seller actions and adoption from learning engagement to campaign participation.

Keep It Simple Or Be Forgotten

Sales teams today face an overwhelming number of tools, messages and shifting priorities. The recent Incentive Research Foundation (IRF) "Using Incentives to Drive Pipeline" study showed that channel partners may be in up to 50 incentive programs and actively participate in half. Even direct sales teams experience challenges with competing priorities and demands. Incentive programs that are overly complex add to that burden.

High-performing programs simplify decision-making by making expectations explicit and progress visible. As the IRF study states, "If a partner can't understand 'what's in it for me' in 60 seconds, the program likely loses attention."

If Data Is the Driver, AI Is the Accelerator

What is your goal and how can you measure your return on objectives? That question is where effective use of data starts – but it's also where many programs stall.

Data tells you what is happening. It shows activity, results and patterns over time. But on its own, it does not change behavior. This is where AI plays its role in a sales incentive strategy. AI accelerates the value of your data by helping you move faster from insight to action. It identifies patterns sooner, highlights what matters, and surfaces where to focus next.

That is AI's true purpose – not replacing strategy, but making data more usable, decisions more timely, and execution more precise. A strategic incentive partner can layer insight and experience over algorithms to super-charge your results. Without that clarity, AI moves faster, but not necessarily in the right direction.

Be Human

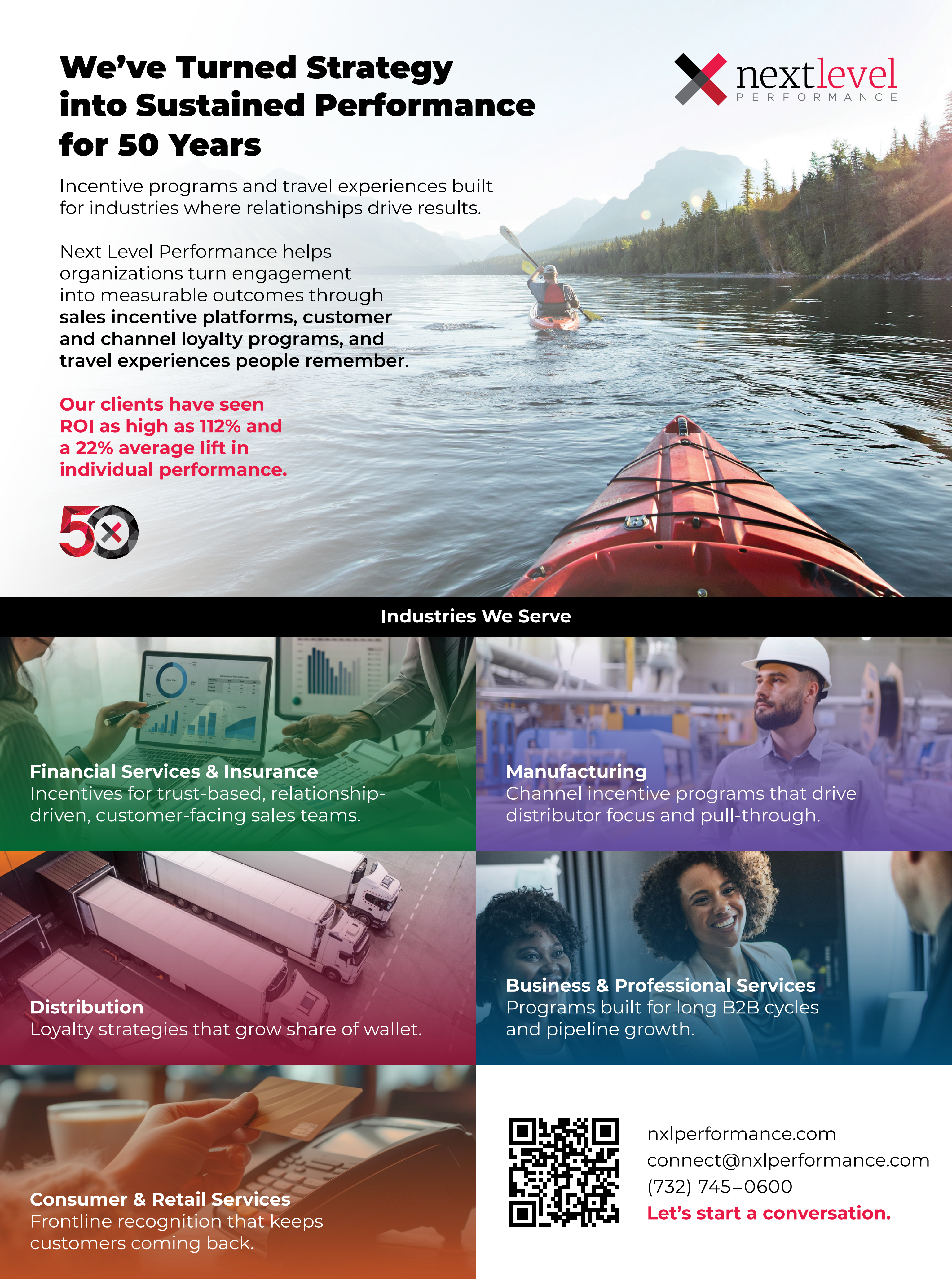
Sales incentives inspire people to perform. Inspiration is not only an emotion, it's what connects emotion to action. And that is entirely human.

While data and AI can provide incredible insight into program structure and performance, human intelligence delivers the emotional acumen to connect people to their goals. In his recent book, "The Next RenAIssance: AI and the Expansion of Human Potential," Zack Kass (former OpenAI head of go-to-market) writes, "Courage, compassion, hope, curiosity, humor, wisdom, morality and empathy are measures of human achievement. And soon these 'soft skills' may in fact become our primary means of differentiation. So my advice to you is: be human."

By leaning into communication, aspiration and the human drives for recognition and belonging, you can differentiate your program from others and inspire the people whose emotional investment is essential for your targeted outcomes.

Incentives don't drive performance on their own. Clarity, visibility, consistency and human nature do.

Susan Adams is the vice president of Client strategy and Engagement at Next Level Performance. Next Level is proud to celebrate its 50th anniversary this year as it continues to lead the way in the design and implementation of sales incentives, channel and customer loyalty, employee recognition, meetings, and event solutions.



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The Sales KPI Problem Has Nothing to Do with KPIs

BY PAOLO ANGELI, AKERON NORTH AMERICA

A theme at Gartner CSO 2026 was simple: sales leaders have more performance data than ever, but the systems that determine how reps get paid, what territories they own and what they're measured against still move on quarterly and fiscal cycles. That gap – between the signals on the dashboard and the decisions that shape rep behavior – is the productivity story of 2026.

The 10 KPIs Every Sales Organization Already Tracks

The diagnostic stack hasn't moved in years: target deviation, pipeline volume, opportunity score, lead conversion rate, cost per lead, revenue per rep, opportunity-to-win ratio, churn and retention, profit margin and product mix. These KPIs remain the foundation of sales management because they cover the full arc of performance: volume, efficiency, conversion, quality and retention.

The point is not to replace them. It's to connect them to the systems that actually change behavior.

The Wiring Is What's Broken

Most sales organizations have invested heavily in reporting. Far fewer have invested in the layer between reporting and the systems that decide how reps are compensated, where territories are drawn and what quotas land where.

Revenue per rep tells a leader who is underperforming, but if the comp plan still operates on a stale cycle, the incentive structure lags the signal by months.

Opportunity-to-win ratio shows where deals break down, but if the quota engine doesn't ingest that signal, the territory plan can keep rewarding closers while starving the prospectors who feed them.

Lead conversion may improve quarter over quarter, but if SPIFs still pay on top-of-funnel volume regardless of downstream quality, the organization rewards activity instead of outcomes.

The issue isn't visibility. It's actuation. The KPI layer is intact. The decision layer isn't.

What CSO 2026 Made Clear

Two conference themes converged on the same answer: redefining sales productivity and designing effective incentive programs are not separate challenges – they are two sides of the same operating problem.

Productivity is no longer just a measurement question. It's a connection question. The dashboards exist. The metrics are mostly right. What's missing is the layer that turns a performance signal into a comp adjustment, a territory rebalance or a quota recalibration fast enough to matter.

That's why the "AI-driven sales force" conversation mattered. AI agents can close the loop between signal and action by ingesting live metrics and proposing system-level changes in near real time – the shift from reporting to faster commercial decisions.

What It Looks Like in Practice

Avon selected Vulki Incentive Compensation to replace a homegrown system during a transition to a new compensation plan. The business needed scalable comp management, harmonized regional processes and greater transparency. The win: a 12-week project plan, an out-of-the-box approach, and strong mobile capabilities.

An integrated SPM environment consolidated plan management, dispute handling, mobile access and executive reporting into one workflow. The unlock wasn't a new metric. It was the speed to act on the metrics they already had.

What This Means for Sales Leaders and Where This Is Going

The work ahead isn't building new dashboards. It's wiring them into the systems that decide comp, territories and quotas.

That's the agentic SPM shift. At Akeron, we built the agentic layer we call AKYBA to close that gap. The thesis is straightforward: KPIs only matter when they are connected to the decisions they should drive.

The CSOs who outperform in 2027 won't have better dashboards. They'll have rewired comp, quota and territory to respond to performance signals in real time. The edge won't come from collecting more data. It will come from acting on it faster. smm

Paolo Angeli is general manager of Akeron North America, a company specializing in enterprise software to drive growth and enhance business performance efficiency.

The #1 Reason Sellers Don't Perform Under Pressure

BY JEFF BLOOMFIELD, BRAINTRUST

Every sales leader has watched a seller walk out of a call and say, "I should have asked a better follow-up there," or "I knew I moved too fast." The frustrating part is that the seller is usually right. They knew what they should have done.

That tells us something about the real performance gap in sales. The problem often isn't that sellers don't know what to do. The knowledge is already there. They learned it in training. They talked it through in coaching. They may have nailed it in a role play. But when the buyer pushed back, they couldn't reach the right behavior in the moment it mattered most.

For years, our industry has tried to fix this by adding more – more content, more training, more tools. Now, with AI everywhere, we're adding more simulations, more prompts and more automated coaching. None of that is bad. Sellers need knowledge, process, practice and coaching. And AI may be the most powerful accelerator we've ever had. But if we're not careful, we'll keep treating a pressure problem like a knowledge problem.

Pressure Defaults

Buyer resistance isn't a classroom quiz. It's a pressure event. When a CFO asks a question the seller didn't see coming; when procurement says, "You're the most expensive option"; when the champion suddenly goes quiet, the seller's nervous system stops operating the way it did in the training room. It starts scanning for risk. That risk isn't physical danger, but to the brain it's just as real: losing the deal, losing credibility, missing the forecast, having to explain to a manager why the deal slipped.

When that pressure rises, the nervous system shifts the seller into a different state. And when state changes, access changes. Access to patience. Access to curiosity. Access to the strategic judgment the methodology requires. That's why a seller can know they should slow down and still speed up. Know they should ask the second question and still start pitching. Know they should explore the cost of inaction and still defend the price.

Those aren't character flaws. They're pressure defaults.

Knowledge and Habit Are Not the Same

Knowledge is what a seller can explain when they're calm. Habit is what they do automatically when it gets hard. In a real conversation, the seller is carrying a tremendous cognitive load. Reading the room, handling objections, protecting the deal, sounding credible, all at once. Under that load, the behaviors that matter most can't depend on conscious recall. They have to be wired deep enough to show up on their own.

This is where the excitement around AI needs a little adult supervision. AI won't magically create better sellers. It scales whatever behavior system you put inside it. If your methodology is product-centered, AI just makes your reps better at being product-centered. If your coaching is shallow, AI will expose it. If your role play rewards fluency without changing the seller's pressure response, your people get better at sounding good in practice and still break down in the real thing.

The goal isn't more repetition. The goal is better default behavior under pressure.

The organizations that win the next era of sales will prepare sellers differently. They'll help reps understand the buyer's pressure before the conversation begins. They'll teach conversation architecture, not scripts. And they'll reinforce the right behaviors through coaching, practice and real-world reps until they become the seller's natural response when resistance shows up.

So, before you invest in the next platform, training initiative or AI simulation, ask a better question. Not "Did they complete it?" or "Did they understand it?" but "What behavior are we making automatic?"

Because when pressure rises, sellers don't perform based on what they know. They perform based on what's been wired. And when the moment gets hard, the brain doesn't reach for the slide deck. It reaches for the habit. SMM

Jeff Bloomfield is the founder of Braintrust, an AI infrastructure company, and the author of "NeuroSelling" and "NeuroCoaching."

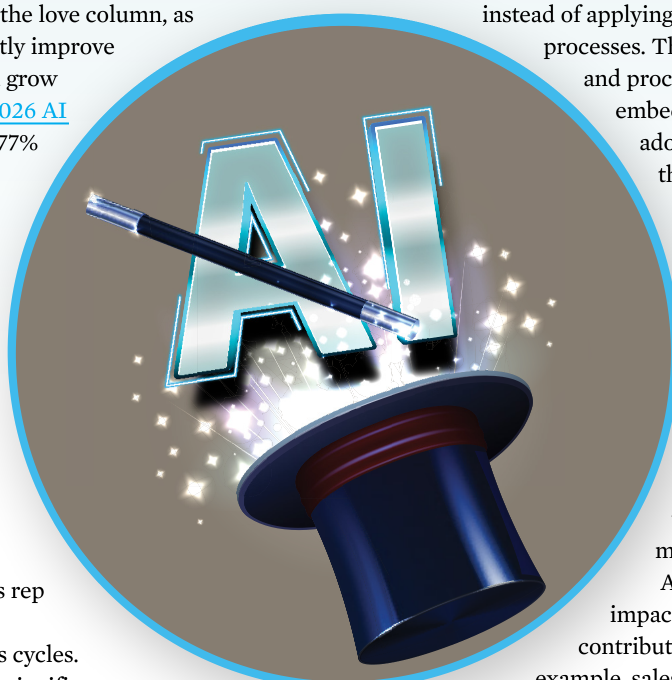
AI Delivers Revenue Results: 77% of Leaders Report Growth

BY MICHELLE DAVIDSON, ALLEGO

AI. People have strong feelings about the technology.

Many despise it for the "AI slop" large language models such as ChatGPT and Claude churn out, not to mention how it appears to be eliminating jobs. While others love it for its ability to speed up tasks, provide instant access to information, and brainstorm ideas.

You can add revenue teams to the love column, as they're seeing benefits that directly improve their ability to drive revenue and grow business. According to Allego's [2026 AI in Revenue Enablement Report], 77% of revenue team leaders report increased revenue from AI.



Looking more closely at the research, which surveyed 318 leaders in sales, marketing, enablement and customer success:

- 84% say AI-driven sales coaching tools improved coaching quality.
- 83% report reduced onboarding time for new reps.
- 80% report improved sales rep effectiveness.
- 73% say AI shortened sales cycles.

The research further indicates significant opportunity to scale the use of AI across revenue organizations. Sixty-three percent of leaders say their teams are still in the initial phases of adoption, and 88% plan to increase investments in AI tools in the next 12 months.

Unsurprisingly, the areas where leaders intend to invest more are areas they're already seeing success: AI-driven sales coaching (40.57%), AI-driven training (40.25%), and AI-powered revenue forecasting. Respondents also have a strong interest in agentic AI (40.57%).

AI Cautions and Challenges for Revenue Teams

Revenue teams face several challenges scaling their use of AI, though. Roadblocks include understanding and trusting AI outputs (41%), managing changes from AI adoption (36%), issues with data quality and availability (33%), integrating with existing systems (28%), and lack of skilled staff (26%).

Analysts agree AI literacy is crucial. Without it, revenue teams will not attain all the benefits possible. It's important, therefore, that leaders train their teams, but also that vendors offering AI-powered software educate their users and guide them on how to use the tools.

AI literacy also applies to revenue leaders, analysts say. Many leaders look at how their front line uses the technology, but it's only when leaders' literacy rises, that AI will shift from being an operational tool to a strategic lever.

When revenue leaders approach AI from a strategic viewpoint, they can redesign workflows with AI in mind instead of applying the technology to existing processes. That involves dismantling systems and processes, rebuilding them with AI embedded, eliminating data silos, and adopting shared orchestration across the buyer lifecycle. Revenue teams that do that will see even greater gains from AI, analysts say.

Measuring the Impact of AI on Revenue Teams

Perhaps the greatest impact AI has on revenue teams is increased productivity. However, many don't take the time saved and apply it to things that could earn their company more revenue, analysts say.

A better way to measure the impact of AI is to determine the value contributed per person, analysts say. For example, sales leaders should calculate sellers' capacity and velocity before and after using AI. Does AI:

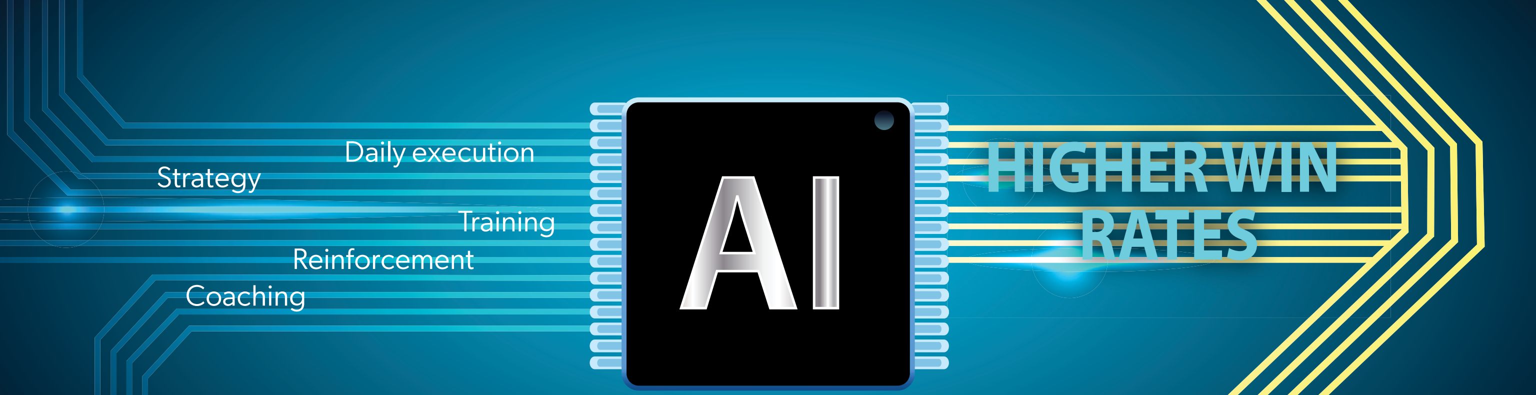
- Improve sellers' capacity to sell?
- Make it possible for sellers to handle more opportunities?
- Help sellers find more opportunities?
- Help sellers win more?

With that data, revenue leaders can accurately measure the impact and determine the return on their AI investments.

The Future of AI in Revenue Enablement

With 63% of revenue teams still in the early stages of AI maturity, we can expect adoption to continue to grow. Scaling its use and achieving success, however, will require more than technology. Humans are still very much a part of the equation, beginning with leaders who understand the strategic value of AI and users who know how to use the technology to grow business.

Michelle Davidson is the content marketing manager at Allego, whose revenue enablement platform embeds learning, content, coaching, digital selling and practical AI into workflows across the customer lifecycle.



The Gap Between Knowing and Doing

What AI can't fix on its own

BY NICK KANE, JANEK PERFORMANCE GROUP

This year's Gartner CSO & Sales Leader Conference was dominated by conversations about AI. That was expected. What was more interesting was how often those conversations pointed back to a familiar challenge. Organizations continue to invest heavily in technology, training, coaching and sales transformation initiatives, yet many still struggle with inconsistent execution, uneven coaching, sub-par performance and the challenge of turning training into lasting behavior change.

Over the last two decades, I've watched organizations invest in CRM systems, enablement platforms, conversation intelligence tools, database tools, and now, AI. Most delivered value. Yet many failed to create the lasting improvement leaders were hoping for.

The reason is often surprisingly simple. The pieces that should work together are built separately.

Strategy gets developed in one part of the business. Training happens somewhere else. Technology is implemented by another group. Managers are expected to connect everything while still delivering results. Every investment may be valuable on its own, but when those efforts operate independently, the impact is limited. Organizations end up with technology that is underutilized, training that doesn't stick, or recommendations that never become part of day-to-day selling behavior.

It's About Connectivity

Over the years, we've come to believe that successful sales improvement efforts share three characteristics. They combine useful technology, practical expertise and training that is reinforced and actually changes behavior. When one of those elements is missing, results tend to be temporary.

That is why the current conversation around AI is so interesting. The most promising applications are not replacing salespeople, managers or coaches. They are helping organizations connect activities that have traditionally been disconnected.

For years, leaders have talked about continuous development, coaching, practice and reinforcement. The ideas were sound, but they were difficult to sustain. Training happened, people went back to work, managers became consumed by competing priorities, and old habits returned.

Today, technology has matured to the point where those gaps can finally be narrowed in practical ways. We are already seeing examples of what happens when AI is connected to a broader performance strategy. One Janek client reported a 5% increase in win rates and sales cycles that were approximately 20% shorter in less than 60 days from implementation after incorporating AI-driven practice and reinforcement into its sales development process. Another client shared a result that immediately caught my attention: "We put seven deals through the process and closed every one of them. What stood out was the speed. On average, it took about four sales calls versus our normal eight to 10."

Technology by Itself Won't Win the Day

Those results were not created by technology alone. They came from combining technology with sales training, coaching, manager involvement and reinforcement. AI accelerated the process, but it was not the reason the process existed in the first place.

As I reflect on the conversations from Gartner, I suspect the organizations that benefit most from AI will not necessarily be the ones with the largest budgets or the most tools. They will be the ones that use technology to connect strategy, training, coaching and day-to-day execution in ways that change what sellers actually do when they sit down in front of customers.

If AI can help close those gaps, the impact will extend well beyond productivity gains. The real opportunity is helping salespeople practice more often, receive better coaching, and reinforce the skills that lead to stronger customer conversations. Because the difference between average and exceptional performance has rarely been a lack of knowledge. More often, it's the ability to turn the right behaviors into habits that show up every day, in every customer interaction.

Nick Kane is managing partner at Janek Performance Group, a global sales performance company that helps organizations improve how their teams sell through consulting, training, coaching and Jenius CC, an AI-powered platform designed to reinforce skills, strengthen coaching and drive lasting behavior change.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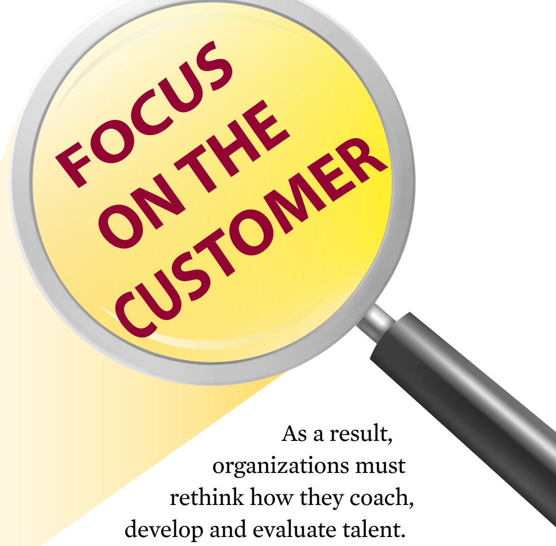
From AI Hype to Sales Execution: What Leaders Must Do Next

BY MICHAEL BUTLER, BRIGHTSPOT INCENTIVES & EVENTS



Until now, much of the conversation surrounding AI focused on possibility. Teams rushed to evaluate platforms, pilot technologies and identify use cases that could improve efficiency. Today, sales leaders are focused on how to operationalize AI in ways that improve productivity, strengthen engagement and drive measurable outcomes.

What became increasingly clear throughout the Gartner Sales Leader & CSO Conference is that technology alone is not separating high-performing organizations from everyone else. In fact, many of the companies achieving the strongest results are not necessarily those using the most tools. Instead, they are making disciplined decisions about where technology creates value while focusing equally on process improvement, sales enablement, manager effectiveness and cross-functional alignment.

Three themes were seen repeatedly throughout the event:

Simplify Before You Scale

As organizations invest in AI and productivity platforms, many are unintentionally creating additional complexity for sellers rather than removing it.

Reps are often expected to navigate multiple systems while simultaneously maintaining customer relationships and advancing opportunities. Each tool may offer value individually, but the cumulative effect can create friction that slows execution.

Technology challenges are often symptoms of deeper organizational issues involving workflow design, process discipline, data quality and role clarity. Often, the problem is not the technology itself, but how it has been integrated into the sales cycle.

Organizations making the greatest progress are simplifying the seller experience, aligning technology to existing workflows, and concentrating investments on activities that directly support pipeline growth. They are reframing the question, "What else can we automate?" to "How can we make selling easier?"

Productivity gains are rarely achieved through technology alone. They occur when technology, process and human behavior work together to eliminate friction and create focus.

Redefine What High Performance Looks Like

The conference also reinforced that AI is reshaping the role of the salesperson.

As automation assumes more administrative and transactional work, the value of human sellers is increasingly shifting toward relationship-building, strategic thinking, adaptability and consultative problem solving. Activities that once consumed significant time, like research and data entry, are becoming increasingly automated.

As a result, organizations must rethink how they coach, develop and evaluate talent. Traditional metrics like calls made, emails sent and meetings scheduled remain useful, but they are no longer sufficient measures of performance on their own. Leading organizations are placing greater emphasis on buyer engagement quality, opportunity progression, account growth and the seller's ability to create value throughout the buying journey.

This shift also elevates the importance of sales enablement and frontline leadership. Several sessions highlighted the critical role that managers play in helping teams adopt new tools, reinforce desired behaviors, and maintain accountability during periods of change. Technology may accelerate productivity, but sustainable performance improvements still require coaching, reinforcement and leadership engagement.

Put Customer Relevance at the Center

Today's buyers have access to more information than ever before, making generic outreach and product-centric messaging increasingly ineffective. Customers expect sales professionals to understand their business priorities, challenges and desired outcomes before a conversation even begins.

Organizations that continue to focus primarily on products and features risk stalled pipelines, declining engagement and longer sales cycles.

Conversely, organizations generating stronger growth are investing in more effective account planning, relevant messaging and tighter alignment between sales, marketing, revenue operations, enablement and customer success teams. They recognize that customer trust is built through consistency across the entire buyer experience rather than through individual interactions alone.

Ultimately, the organizations that outperform over the next several years will not be distinguished by the AI they deploy. They will be distinguished by how effectively they combine technology, process, leadership and human expertise to create meaningful value for customers. The era of AI experimentation is rapidly giving way to the era of sales execution, and the organizations that embrace that reality will be best positioned for sustainable growth in the years ahead. smm

Michael Butler is vice president of sales at Brightspot, an incentives and event management agency that designs and manages employee recognition programs, sales incentive campaigns and incentive travel

The New Sales Productivity Playbook: Stop Counting Hours and Start Measuring Interaction Value

BY STEVE RIETBERG, VP ANALYST IN THE GARTNER SALES PRACTICE

Sales leaders have a paradox on their hands: AI is giving sellers back time, yet many organizations still aren't hitting productivity goals. According to Gartner research, sellers saved on average 4.8 hours per week through AI tools, but 28% of CSOs still fell short of revenue-per-seller goals.

Why the disconnect? Most sales orgs still measure productivity at the deal level – wins, pipeline, win/loss analyses – while AI innovation is accelerating at the interaction level, improving how sellers prepare, engage and follow up with customers. The result is a fundamental disconnect: We invest in making interactions better, but we inspect success largely through deal outcomes that lag and obscure what actually drove progress.

The real productivity opportunity isn't simply "more hours," it's ensuring AI time savings are reinvested into high-impact customer activities – the moments where top performers differentiate. Gartner research links improving seller time spent on high-impact customer activities to being 3.3x more likely to exceed revenue growth targets and 3.9x more likely to exceed growth from existing customers targets. The challenge is identifying which activities are truly "high impact" and doing so objectively.

The Roadmap to Interaction-Based Productivity Analysis

1. Analyze Interaction Value Comparatively

If you want analytics that actually changes performance, start with comparative seller performance analysis: segment sellers into meaningful cohorts, compare individuals to peers, then compare top performers to peer averages to pinpoint what drives outcomes.

The shift is moving beyond classic deal decomposition (deal count, win rate, average deal size) toward interaction-based productivity. Gartner outlines three interconnected metrics that redefine productivity through customer engagement:

- Seller Reach: number of accounts actively engaged per period
- Seller Engagement: number of interactions conducted with each active account
- Interaction Value: revenue earned per customer interaction

Used comparatively, these metrics create a much richer coaching and management view. For example, a rep can sit at peer-average productivity while showing low reach (over-reliance on a few accounts) but high interaction value—a clear signal to coach for broader coverage while protecting and replicating what makes their interactions so effective.

2. Upgrade Your RevTech Stack

You can calculate average interaction value in a simple way, but the real breakthrough is measuring value per interaction – how much progress each call, email or meeting generates. Gartner describes a more granular approach: if a meeting increases the probability of winning a $200k deal by 10%, that interaction "earned" $20k of value.

Traditional CRM workflows struggle here because they rely on sellers to estimate and record probability changes – often overstated and inconsistent. This is where AI changes the game. Conversation intelligence captures interaction signals (topics discussed, competitor mentions, pricing objections) and outcomes (sentiment, interaction quality, deal score change), enabling an objective model of interaction impact.

Gartner highlights two enabling capabilities for this:

- Conversation intelligence (interaction capture, topic detection, sentiment analysis)
- AI deal scoring (health scores, win probabilities, risk flags)

These capabilities may be found across multiple markets (e.g., CRM sales platforms, revenue action orchestration, revenue enablement platforms, win/loss solutions), and typically require configuration rather than "out-of-the-box" adoption.

3) Apply Interaction-Based Insights to Key Decisions

Interaction-based analysis only matters if it changes decisions, not just dashboards. Examples of applying interaction-based performance insights include:

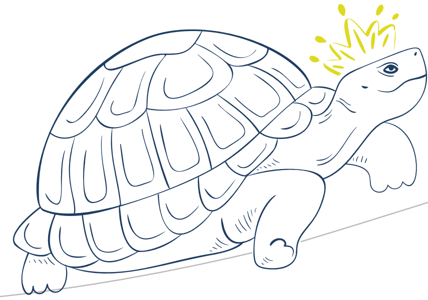
Enablement strategy: Use comparative interaction metrics to see what top performers do differently (e.g., outperforming via seller reach) and prioritize enablement investment accordingly; then go deeper with conversation intelligence to identify which scenarios (like pricing objections) separate top performers from the cohort.

Sales role design: Identify which interactions yield the highest value, reassign lower-value activities to lower-cost resources (humans or agents), and redesign roles around high-value interaction time and skill requirements.

Sales strategy: Revisit GTM levers – partner strategy, value messaging, sales process activities, competitive playbooks, segmentation – based on where reach, engagement, or interaction value breaks down across cohorts and segments.

Performance analysis has no value if it doesn't drive decisions. CSOs' need for insights is at an all-time high, and interaction-based performance analysis can help CSOs to unlock the information they need to make better strategic decisions and drive revenue growth for their organization. SMM

Steve Rietberg is a vice president analyst in the Gartner Sales Practice who presented live on this subject and others at the Gartner CSO & Sales Leader Conference.



Stop Celebrating the Wrong Sales Managers

BY MARK MCWATTERS, AMBITION

Imagine this, CRO: The quarter ends and you're reviewing which teams hit or missed quota. Manager Daniel hit his number. Manager Julia missed.

On Daniel's team, Hero Mike went 350% of quota, carrying the team over the line. Of eight reps, Daniel had three exceed quota.

Meanwhile, Julia had five of eight hit their individual quota, but missed her overall team number.

When you dig deeper, Julia coaches her team regularly through 1:1s, call reviews, pipeline reviews and measuring sales methodology adherence. She runs every play that enablement recommends. She also has four sellers with less than a year of tenure.

Julia is an Active Coach with a young team. Daniel.... has Mike.

In many orgs, Daniel goes to President's Club, while Julia gets lost in the shuffle because "at the end of the day, all we care about is hitting the number."

Fast forward two quarters, and switch Daniel and Julia's teams.

Guess who hits quota? Julia. Not only does she have Hero Mike, but now six of her eight reps hit because she is actively coaching them.

Set the Stage for Managers to Be Active

The lesson here is that manager accountability requires additional levels of analysis. The best managers actively coach, regardless of whether they have a Hero Mike or a new hire.

Most CROs want the active coach, not the manager who got lucky with talent.

And in a world where team sizes are growing, revenue expectations are rising, and initiatives shift overnight, the frontline manager is more critical than ever. Without manager buy-in, CRO initiatives die. With manager buy-in, they thrive.

To activate busy frontline managers, organizations must remove administrative and reporting hurdles. Make it as easy as possible for a manager to get full performance context fast.

Right now, when you ask your FLM for a team performance breakdown, you're asking them to synthesize four to six different systems. That requires at least 30 minutes to build a narrative, before any actual coaching happens. When they have four fires to put out, seven deals to help close, and 37 unanswered Slacks, performance management gets lost in the mix.

Before you know it, underperformers go unaddressed, overperformers go unrecognized, and that expensive sales methodology you invested in six months ago is completely forgotten.

Not because managers want to drop the ball, but because they don't have a system.

3 Steps to Operating Rhythm

The fix is a performance management operating rhythm that defines clear coaching expectations and uses AI to aggregate performance context across systems. Here's a three-step framework to introduce this type of operating rhythm at your organization:

Step 1: Reduce the administrative load. Use AI to aggregate performance data and surface what's going well and what isn't. The goal is to make it easy for a manager to walk into every coaching conversation fully informed – not spending 30 minutes pulling reports beforehand.

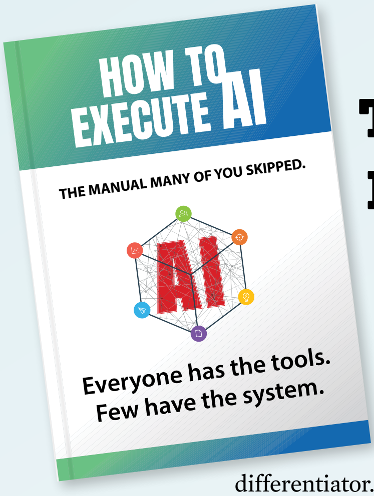
Step 2: Inspect coaching with AI. Once coaching is happening, the next question is whether it's effective. Are managers following the sales methodology? Addressing the right pipeline gaps? AI can analyze coaching sessions and surface patterns, connecting coaching activity to actual KPI movement.

Step 3: Extend visibility up the chain. Second- and third-line leaders can now inspect FLM coaching at scale, seeing what's working, what isn't and whether their people are coaching to expectations across every team.

When this operates well, coaching becomes a companywide system, not a box-checking exercise. Your FLMs spend time actually coaching. Enablement initiatives stick. And your entire organization aligns to the same playbook – every 1:1, every pipeline review, every coaching interaction.

That's how you stop celebrating the wrong managers.

Mark McWatters is vice president of revenue at Ambition, a B2B sales performance and coaching software company that helps enterprise and mid-market revenue teams boost productivity, track goals and improve employee engagement.



The AI Sales Paradox: Technology Is No Longer the Edge, Execution Is

BY HOLDEN OLSEN, TTEC

Access to AI powered tools like conversation intelligence, predictive analytics, automated outreach and agent assist is no longer a differentiator. What separates market leaders from everyone else today isn't what AI they've purchased. It's how effectively they've architected execution around it.

That's the AI sales paradox: adoption is accelerating, but revenue outcomes remain inconsistent.

AI adoption has outpaced revenue impact.

Over the past 18 months, AI adoption in sales has moved from experimentation to expectation. In many organizations, rolling out AI tools is seen as a prerequisite for competitiveness.

Yet performance gains haven't scaled proportionally.

The issue isn't the technology. It's what happens – or doesn't happen – around the technology.

Without defined processes, governance and lifecycle ownership, AI simply automates fragmented motions. It makes teams faster but not better. And faster execution of broken processes rarely produces growth.

The Missed Step: Strategy Meets Execution

When sales leaders roll out AI without an execution strategy, adoption stalls and impact flattens. Sellers get overwhelmed, systems remain disconnected, and insights fail to translate into action.

Before introducing AI into a sales organization, leaders should be asking:

- How does this AI improve decisions at each stage of the customer lifecycle?
- How does it integrate across sales, marketing, service and RevOps?
- What processes must change to let automation actually matter?
- How do we operationalize insights, not just surface them?

AI only delivers ROI when paired with intentional revenue orchestration.

From Activity Volume to Decision Intelligence

Historically, sales success was measured by activity volume – calls, emails, meetings. AI has commoditized those metrics.

Administrative work, research, content drafting, even first pass qualification are increasingly automated. The competitive shift is clear: from doing more to deciding better; and from static playbooks to dynamic, signal driven actions.

Why Fragmented Sales Motions Kill AI ROI

The most common AI failure pattern we see is layering advanced tools on top of disconnected sales motions.

Poor data foundations, siloed systems and unclear ownership prevent AI from delivering meaningful outcomes. Insights get surfaced but nobody acts on them. Sellers toggle between platforms. Leaders struggle to link activity to impact.

Unlock Revenue Across the Full B2B Customer Lifecycle

This is where RevGen becomes essential, not as a tool set, but as an execution layer.

RevGen is designed to operationalize AI across every B2B customer interaction: targeting and acquisition; onboarding and activation; product adoption and usage growth; ongoing account support; and renewals, expansions and win backs.

AI enabled sales reps, performance automation and real time analytics allow enterprise grade revenue motions to scale down market profitably. What was once cost prohibitive to manage internally now becomes executable as an operating expense (OpEx) model, rather than ongoing capital expense (CapEx) investment.

Scale Enterprise Sales Discipline Down Market

In today's environment of rising customer acquisition costs, growth increasingly comes from better onboarding, deeper product adoption, early churn prevention, personalized renewal and recovery strategies.

AI allows RevGen to monitor account level signals at scale – usage patterns, behavioral shifts, service intent, renewal risk – and trigger the right intervention at the right moment.

That means faster onboarding and activation, contextual outreach tied to real customer data, proactive retention instead of reactive churn, and customized win back strategies driven by root cause insights. All powered by AI but executed through proven sales processes.

It also frees internal teams to focus where it matters most.

AI Is the Multiplier, Not the Strategy

AI should never be the strategy. It's the multiplier of a well designed one. In a world where every competitor has access to the same models and automation tools, execution architecture becomes the only sustainable advantage.

Partners like RevGen exist for this exact moment – bringing together AI enabled tools, proven sales playbooks and operational rigor to help companies grow faster, smarter and more sustainably.

Holden Olsen is vice president of global GTM strategy and sales overlay (RevGen) at TTEC, a digital global customer experience (CX) technology and services company. TTEC helps companies continuously optimize CX and business outcomes to deliver the highest customer satisfaction at the lowest cost of conversation.

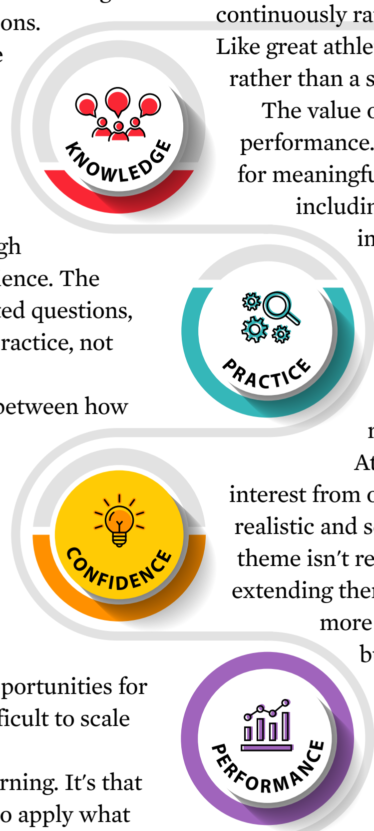
Why Confidence Is the Missing Link in Sales Enablement

BY ASHLEY JOHNSON, UNEEQ

Sales organizations have never invested more in training, onboarding and enablement, yet many leaders continue to face the same challenges: lengthy ramp times, inconsistent performance, disengaged reps, rusty communication skills and difficulty translating learning into measurable results.

The issue is rarely a lack of training. More often, it's a lack of practice.

For decades, sales enablement has focused on delivering information. New hires attend onboarding sessions. Teams participate in workshops. Reps complete certifications and consume an ever-growing library of (often outdated) content. While these efforts are valuable, they often assume that knowledge alone is enough to drive performance.



Sales is a skill, and skills are developed through repetition. Confidence is built by gaining experience. The ability to navigate objections, adapt to unexpected questions, and guide complex conversations comes from practice, not just instruction.

That's where organizations encounter a gap between how information is learned and how it's applied.

Practice Begets Readiness

Training events are often concentrated into a few key moments throughout the year, while customer conversations happen every day. Managers understand the importance of coaching, but they're balancing growing responsibilities and larger teams. As a result, opportunities for individualized practice and feedback can be difficult to scale consistently across an organization.

The challenge isn't that sales teams aren't learning. It's that they aren't always given enough opportunities to apply what they've learned before it matters most.

This creates a ripple effect across the business.

When reps lack confidence in critical conversations, ramp times can stretch beyond expectations. Training investments lose momentum without reinforcement. Productivity slows as managers spend more time revisiting foundational skills. Over time, engagement can suffer as employees struggle to connect training content to real-world outcomes.

Forward-thinking sales leaders are responding by shifting their focus from training alone to readiness.

Readiness is the ability to perform when it counts. It's the difference between understanding a sales methodology and confidently applying it during a customer conversation. Creating readiness requires ongoing practice, feedback and reinforcement, just like athletes, musicians, actors, pilots and any other vocation.

AI roleplay simulations and immersive training experiences can provide sales teams with opportunities to practice realistic scenarios in a safe environment. Reps can refine their approach, test messaging, navigate objections and build confidence before engaging with prospects and customers.

Always-On Availability

Perhaps more importantly, these experiences can be available continuously rather than only during scheduled training events. Like great athletes, practice becomes part of the work week rather than a separate activity.

The value of this approach extends beyond individual performance. Organizations that create more opportunities for meaningful practice often see broader business benefits, including faster ramp times, stronger engagement, improved productivity and better retention.

Training investments are reinforced throughout the year rather than fading shortly after a workshop concludes. The vast majority of sales managers, meanwhile, say it saves them significant time compared to live roleplay.

At UneeQ Digital Humans, we've seen growing interest from organizations looking to create more immersive, realistic and scalable coaching experiences. The common theme isn't replacing managers or traditional training. It's extending them. Sales leaders want ways to give every rep more opportunities to practice, receive feedback and build confidence between customer interactions.

The future of sales enablement will increasingly depend on how effectively organizations help people apply their training in real-world situations – how well they bridge the application gap.

The highest-performing sales teams understand that training is only the starting point. What drives results is what happens afterward: the practice, reinforcement and coaching that turn knowledge into performance.

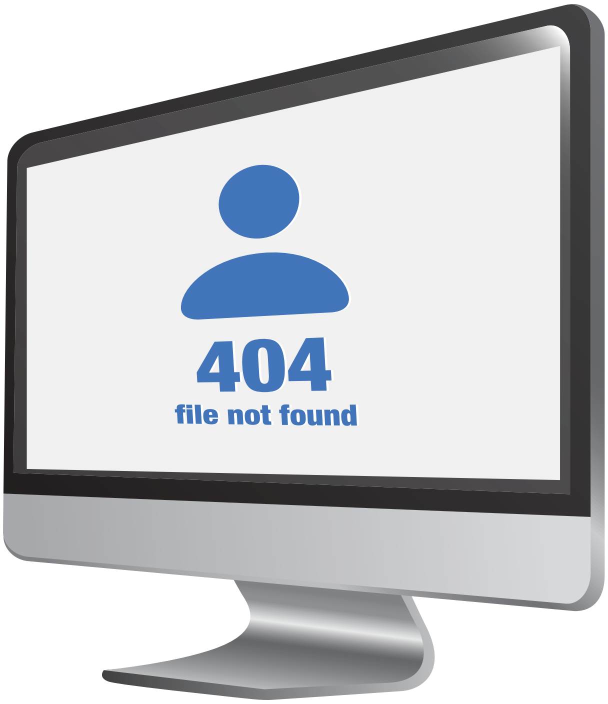
As sales organizations continue searching for ways to improve productivity, accelerate ramp times and close more deals, success will increasingly depend on how effectively teams turn learning into action. The highest-performing sales organizations won't necessarily be the ones that learn the most knowledge, they'll be the ones that practice what they learn the most.

Ashley Johnson is vice president of GTM strategy at UneeQ, provider of an enterprise AI platform that creates highly realistic, interactive "digital humans" designed to simulate natural, human-to-human conversations.

The Missing Metric:

Why Sales Teams Still Miss on Talent

BY TIM GEISERT, AUCTUSIQ



Sales organizations have never had more technology. AI-powered forecasting. Conversational intelligence. Revenue analytics. Automated outreach. Coaching platforms.

Yet wide performance variance still exists across sales teams. Some sellers consistently outperform, while others plateau. Some managers elevate performance, while others struggle to create consistency across their teams.

Despite major investments in systems and tools, many organizations still cannot fully explain why because they have optimized what surrounds the seller, but they have not optimized the sellers themselves.

Read the Full Whitepaper
Download the full report: "Unlocking the Human Advantage In the Age of AI"

What Doesn't Get Measured

Modern revenue systems provide extraordinary visibility into pipeline, activity, buyer engagement, conversion metrics and workflow efficiency. But those systems often fail to measure the most predictive factor driving commercial outcomes: The human capability of the person doing the work.

Revenue organizations traditionally focus on metrics such as:

- Territory potential
- Pipeline strength
- Activity volume
- Conversion rates
- Product knowledge

While these metrics matter, they do not fully explain why one seller consistently succeeds while another struggles under similar conditions. Decades of criterion-based research show that individual talent explains 40–60% of performance variance in sales roles.

Talent is not an abstract concept. It includes measurable traits such as:

- Learning agility
- Growth mindset
- Persistence
- Relationship formation
- Problem solving
- Accountability

The highest-performing sales organizations are beginning to recognize that these human capabilities are not "soft" variables. They are business variables. Top performers consistently share predictable cognitive, behavioral and motivational attributes. In many organizations, the people who score highest on predictive talent measures are the same people consistently leading quota attainment.

Training To the Needs

But the greatest opportunity often sits in the middle of the sales force. Research also shows that moderate-talent individuals can become strong performers when organizations clearly identify the capability gaps limiting performance.

One seller may build relationships naturally but struggle with complex problem solving.

Another may excel analytically but lack consistency and follow-through. Without this insight, coaching often becomes generalized and inconsistent. With it, development becomes far more precise.

Managers can focus on the exact competencies influencing performance instead of relying on broad coaching approaches that treat every seller the same. As sales roles become more complex, technology alone is no longer a differentiator. The difference increasingly comes down to people.

Sellers still need the ability to build trust, solve problems, adapt under pressure, learn quickly, communicate effectively and execute consistently. Because sales is and always has been personal.

That's why we created the most sophisticated sales assessments on the market – to bring the missing human metrics back into the revenue equation. smm

Tim Geisert is partner and chief revenue officer at AuctusIQ, a sales performance technology and services company designed to help companies run sales as a business process.

The C-Suite Relationship Problem in Enterprise Sales

How to get an executive's attention

BY DAVE CHUN, EQUILAR

I spent my early career at investment banking firms where the unspoken rule was simple: the meeting you got depended almost entirely on who asked for it. A cold call from a junior analyst went nowhere. The same ask, routed through a trusted board member or a former colleague, got a response by end of day.

Decades later, I still see it play out the same way from the other side. My inbox looks like every other executive's inbox: full of outreach from people I have never met, asking for time I do not have. The ones I respond to are almost always people I know, or people who came through someone I trust.

Senior executives today are inundated in ways that were not possible even a few years ago. The volume of outreach they receive from vendors, headhunters and AI agents has scaled exponentially. Their attention, meanwhile, has not.

It's Who You Know – And Who Know You

At Equilar, we work closely with sales and marketing organizations that are trying to reach the C-suite. And the pattern is consistent: the tools for identifying executives have improved dramatically, but the tools for actually reaching them have not kept pace.

We recently ran an experiment using our own software that put numbers on something most experienced sales leaders already understand intuitively. We were filling a room for a high-level chief human resource officers (CHROs) event. Three outreach tracks: a cold email from me, a cold email from one of our account executives, and a third track where we used our ExecAtlas platform to identify CHROs who shared a mutual connection with me and activated those relationships for a warm introduction.

The results were stark. Cold outreach, even from the CEO, returned a 3% response rate. Warm introductions, routed through someone the recipient already knew and trusted, came back at 46%. More than 15 times higher.

Sending more emails is not a strategy. Every sales leader knows this, but most teams do it anyway because it is easier than the alternative, which is figuring out who in your organization actually has a trusted path to the person you are trying to reach.

Find the Path of Least Resistance

The math becomes even more consequential at the strategic account level. When a handful of relationships represent a disproportionate share of your pipeline, a single warm path to the right executive can be the difference between a six-figure deal and missing quota entirely.

The discipline worth building is straightforward: before any significant outreach effort, map the warm paths that already exist across your team's collective network. Board overlap, shared employers, mutual investors, former colleagues. Most organizations have more of this than they realize, but it lives in individual inboxes rather than anywhere the team can actually use it. This is the problem ExecAtlas was built to solve, surfacing those paths across an organization's full network and making them actionable at the moment they matter.

When a CHRO changes roles, when a CFO moves to a new company, when a board seat turns over, those moments are windows. Responding through a trusted connection rather than a cold email is what separates the teams that accelerate from the ones that wait.

Relationship capital has always been the real currency of enterprise sales. The organizations winning at the C-suite level right now are the ones investing in it accordingly. smm

David Chun is the founder and CEO of Equilar, which he built over 26 years into a leading source of executive data and intelligence.

How to Find and Coach the Sales Competencies That Decide Your Deals

TIM RIESTERER, CORPORATE VISIONS

A few years back, a popular idea took hold in B2B sales: buyers prefer a rep-free experience.

But Gartner, one of the loudest voices behind that narrative, has changed its story. They now predict that by 2030, 75% of B2B buyers will prefer a human-led experience in complex, high-stakes deals.

It's a surprising turnaround. And it comes with a catch most sales organizations are still missing.

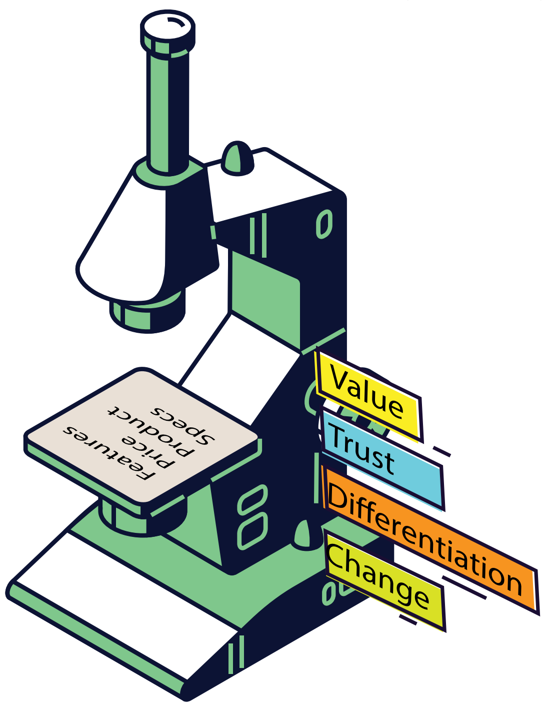
Which Human Interactions Matter Most?

Buyers want sellers present in the moments that have an outsized impact on their decision. The question is, which moments? And can your team deliver in them?

The wrong way to answer that is by looking at your CRM data.

Our research found that sellers and buyers give different reasons for the deal outcome up to 70% of the time. Sellers list reasons like "We couldn't get to the right price" or "We didn't have the features they needed" – explanations that point to things outside their control.

So we spent years asking buyers instead. Our database holds buyer feedback from more than 150,000 B2B win-loss decisions across 500 companies and 50 industries. From that data, we identified the eight most predictive buyer experiences for new business acquisition, and eight more for retention and expansion.



Competencies like Align Solutions to Needs, Articulate Meaningful Value, Make a Case for Change, and Demonstrate Clear Differentiation consistently surface as the most predictive measures of whether you'll win or lose. But other general skills like product knowledge and industry expertise didn't make the cut.

Buyers make decisions based on their experience with your sellers, not features. In fact, 53% of the deals marked as "lost" in the CRM were winnable, according to buyers, if not for critical whiffs in the sales experience.

Pinpoint Who Can Deliver

To win more deals, you need to coach on the right competencies. But you first need to know where each seller stands so you can coach with precision.

Most organizations ask sellers to rate themselves, which carries the same blind spots as CRM data.

Instead, conduct what we call a Precision Skills Assessment – a performance-based evaluation where sellers demonstrate their abilities through a simulated deal cycle, scored against the competencies that predict win rates.

The result is a heat map across your team: Who's strong where? Who's struggling at what? Which gaps are costing you the most? In one pilot, sellers scoring highest in three specific competencies achieved win rates more than 15 percentage points higher than those scoring lowest.

With that signal, coaching decisions become obvious.

Scale It with Methodology-Governed AI

Targeted coaching gets you part of the way there. The harder challenge is sustaining that standard in sellers' conversations with buyers without a manager in the room.

Most AI tools can generate recommendations, but they aren't grounded in your methodology or your win-loss outcomes. The guidance sounds plausible, but it's not calibrated to the behaviors that win deals.

What we call Methodology-Governed AI closes that gap. In practice, it means that your AI identifies the selling situation, maps it to your methodology, and generates guidance within guardrails that are defined by predictive sales competencies. This ensures that every seller gets direction tied to the same buyer-validated evidence that defines your coaching and assessment program.

Now You Know What Good Looks Like

The 53% of lost deals that buyers said were winnable? They were lost one interaction at a time, by sellers who didn't know what good looked like in that moment.

Now you know what it takes to win. Learn which moments decide deals. Coach sellers to deliver in those moments. And scale that standard across your organization. SMM

Tim Riesterer is chief strategy officer at Corporate Visions, a provider of evidence-based sales training, messaging and enablement solutions for B2B revenue teams.

5 Ways Sales Leaders Can Unlock Data-Driven Performance In the Field

To learn more about how Map My Customers can help your field sales team lead with data-driven insights, visit MapMyCustomers.com.

Data from 170+ field sales reps reveals how emerging technologies can drive revenue through smarter selling.

BY MATTHEW SNIFF, MAP MY CUSTOMERS

A Today's B2B buyers want to feel like more than a name in your CRM or a number toward your rep's quota. Personalization has always paid off. But it's taking on new importance as artificial intelligence (AI) and machine learning (ML) become must-have tools in the sales process.

When done right, AI and ML can support your team's sales operations by helping reps spend less time on admin, giving leaders real-time visibility, and surfacing top-performer habits to see what's working (and what isn't). The result is a sales process tailored to what works for your customers.

The data makes it clear: understanding how to use these new technologies to customize the sales experience is table stakes for teams to attract and retain customers today.

The majority (75%) of B2B buyers will be looking for sales experiences that prioritize human interaction over AI by 2030, according to Gartner data.

Meanwhile, the same share (75%) say they will avoid outreach that they feel is irrelevant, Salesforce found.

The entire revenue organization must be able to support the level of personalization that today's B2B buyers demand. After all, buyers who believe their rep genuinely understands their business close at 34% higher rates than those who say their rep is merely knowledgeable, per Forrester. Meanwhile, McKinsey research found, a sales experience not tailored to their business is a top reason buyers switch suppliers.

The AI/ML Advantage for Field Sales

Field sales organizations are built to offer B2B buyers a high-touch, personalized sales experience. Costs are also higher, and sales cycles are longer. That makes it a prime place in the sales ecosystem to use tools like AI and ML to simultaneously enhance personalization while identifying even small changes that can protect revenue.

To better understand the potential of emerging technologies to improve field sales outcomes, we analyzed field sales data from 172 field reps over two quarters at a single field sales-based organization. Each rep performed a variety of activities recorded in the Map My Customers B2B field sales enablement and analytics platform.

In our analysis, we focused on identifying which coachable actions separate top performers. When sales leaders know what works for their customers, they can coach the rest of the team on those best practices. That's how revenue-driving behaviors scale.

Here's what we learned about how to improve performance with data-driven coaching:

- Use peer benchmarks to set realistic KPIs. Instead of guessing at "stretch goals," the team's data can be used to define performance tiers around which to set achievable benchmarks.
- Coach on high-value behaviors. The ability to track which daily activities correlate with the most revenue growth enables sales leaders to guide underperformers toward actions with impact.
- Treat selling as a process, not an art. Top reps follow a structured playbook. The data can help you uncover those actions, so the entire team can learn from them.
- Territory excuses don't hold up. Rep behavior drives larger performance gaps than territory alone. Two reps in similar regions can have vastly different outcomes simply by how they work.
- Digital tools support proactive planning. Features like mobile-enabled routing, proximity-based prospecting, and CRM-driven filters let reps build high-impact itineraries.

By translating insights from your team's field sales data into actionable coaching and planning levers, sales organizations can better align what reps do day-to-day with the team's revenue growth goals.

When teams know what's working, they can follow those signals to proactively build pipeline. That shifts the narrative around what success looks from "luck" or "natural talent" to clear, data-backed actions that deliver the personalized touch your customers need.

Matthew Sniff is the founder and chief product officer of Map My Customers, which helps organizations improve field execution, increase visibility, and create more consistent sales performance.

RUN THE FIELD

mapmycustomers

The system of execution for field sales teams

Field sales is one of the largest drivers of revenue, yet one of the least controlled. Why? Most sales technology tracks what already happened, but falls short in helping teams decide what to do next.

That gap shows up in how teams actually operate:

- Reps lose selling time to admin and log activity late or not at all
- High-value accounts are missed
- Territory coverage breaks down
- Top performers succeed in ways that aren't visible or repeatable
- Coaching is based on opinion, not actual behavior
- Performance becomes inconsistent
- Decisions are made on incomplete or delayed information

What we need is a system of sales execution.

EXECUTION DRIVES RESULTS

Field Sales

Spend more time selling and less time updating systems.

Sales Operations

Get reliable data with minimal rep burden.

Sales Leadership

Run the field with visibility into team execution, not just outcomes.

Marketing

Align demand with real-world activity and feedback, improving conversion.

Map My Customers changes the game

- **Remove the Friction.** Data is captured naturally, without extra work, freeing up reps to do what they do best.
- **See What's Really Happening.** View activity in real time, as work happens — not after the fact.
- **Improve Performance.** Turn top-performer behavior into a repeatable system across the team.

The Bottom Line: Sales Execution Requires a Different Approach

Most sales tools can help you understand what happened.
Map My Customers helps you control what happens next.

If execution is inconsistent, performance will be too.
Turn field sales execution into a system — and run the field.

Schedule a demo to see how Map My Customers can enhance your field sales operations

 •

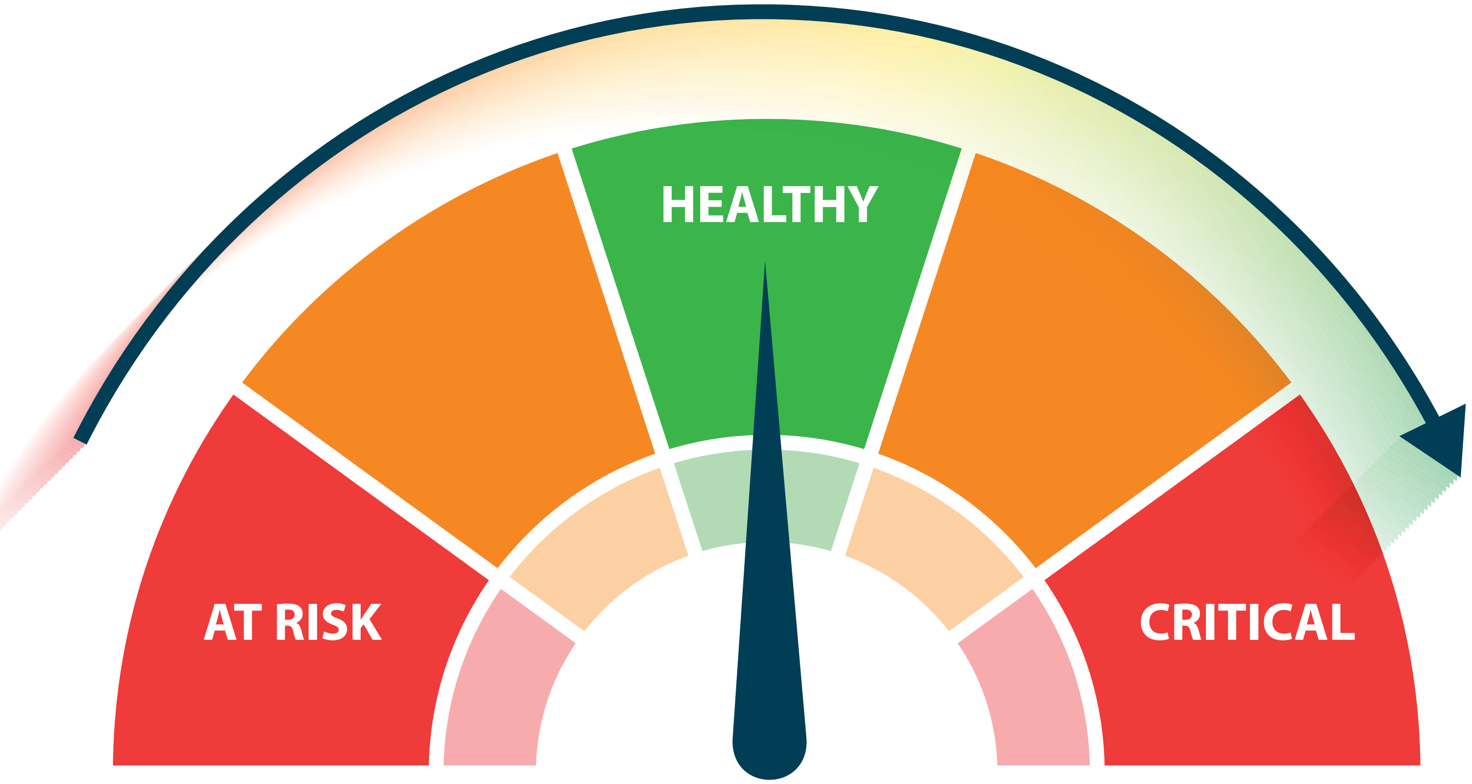
Why Sales Leaders Need a Predictive Health Check, Not Another Dashboard

BY DAVE EGLOFF, GARTNER SALES PRACTICE

Sales leaders have never had more data at their fingertips. They can track pipeline coverage, seller productivity, customer retention, forecast accuracy, cost of sales, tech adoption and dozens of other indicators. Yet many still struggle to confidently answer one essential question: Is the sales organization getting stronger or weaker?

Despite all the investments to improve data-driven decision making and sales productivity, Gartner research shows that 47% of CSOs and sales executives say sales analytics has less influence on sales performance than expected. Why are nearly half of sales leaders struggling with their sales analytics? It's not because of a lack of dashboards. In many cases, it may be too many dashboards – or dashboards that have too many disconnected metrics with too little context. In many cases, it creates more noise.

The next evolution of sales analytics should not be another reporting layer. It should be a predictive health assessment that helps leaders see where the organization is thriving, where risk is building and where intervention is most urgent.



More Metrics Do Not Automatically Mean More Insight

Many sales organizations have built expansive reporting environments in the name of visibility. The intent is sound. Leaders need data to manage performance, allocate resources and make investment decisions. But the status quo approach is not working. Leaders have too many disconnected inputs and not enough insightful outputs.

Sales leaders do not need every possible data point. They need the few signals that reveal whether the organization and the business are healthy. That requires discipline. Start by inventorying the metrics already in use, then separate tactical indicators from strategic signals. A frontline manager may need account-level activity data. A CSO needs a higher-altitude view of organizational health.

The most useful question is simple: Does this metric trigger an executive decision or intervention? If the answer is no, it should not be treated as a leadership metric. Control the noise by reducing the number of metrics that serve only as a distraction.

Focus On Signals that Predict Health

A stronger sales health assessment looks across the full organization, not just the pipeline. Pipeline is critical, but it is only one part of the system. A sales organization can have strong coverage and still be weakening if customer engagement is declining, seller attrition is rising or cost of sales is moving in the wrong direction.

Leaders should evaluate health across several connected dimensions. Financials reveal the stability and profitability of revenue, including growth, price realization, contribution margin and go-to-market productivity. Customer vitality shows the strength of the client base through retention, new customer growth, onboarding speed, engagement and accounts at risk. Pipeline execution measures whether opportunities are moving with enough quality and velocity, using indicators such as lead quality, coverage ratio, stalled deal rate and opportunity slippage.

Team performance adds another layer by looking at quota attainment, seller productivity, seller effectiveness and forecast accuracy. People management helps leaders understand whether talent, culture and structure are creating risk through headcount trends, manager span of control, voluntary turnover and onboarding. Infrastructure completes the picture by examining whether technology and support investments are scalable and productive.

No single metric can diagnose sales health. The value comes from seeing how the signals interact.

Context turns data into decisions

Metrics alone are only data points. They become useful when leaders put them in context.

A seller productivity number, for example, may look strong or weak depending on the target, the historical trend and the environment around it. A team producing $4.1 million per seller might appear healthy in one context and concerning in another. If that figure has declined from $4.8 million, the story is very different than if it has climbed from $2.8 million. Direction matters. So does velocity.

Every important metric should be viewed in two ways. First, compare it to an objective target, which may come from benchmarks, internal goals, peer comparisons or strategic priorities. Second, trend it historically. A metric that is below target but improving quickly may require a different response than one that is above target but deteriorating.

Good analytics should not simply report what happened. It should build confidence, create urgency and prompt action.

Predictive Health Requires Better Questions

A predictive health assessment changes the management conversation. Instead of asking, "What happened last quarter?" leaders can ask, "Where is risk forming before it shows up in the number?"

Are stalled deals concentrated in one segment? Is customer engagement weakening before renewals? Are top sellers carrying too much of the business? Is technology spend increasing without productivity gains? Is manager span of control creating coaching gaps?

These questions help leaders intervene earlier. That early intervention is the point. Sales leadership is no longer only about inspecting performance after the fact. It is about identifying weak signals before they become missed quarters.

Turn Analytics Into a Leadership Advantage

Sales organizations do not need more dashboards that show everything. They need the right data, in the right light, producing real insight.

That starts with discipline. Select fewer metrics. Organize them around organizational health. Compare them to meaningful targets. Trend them over time. Most importantly, use them to make decisions.

The strongest sales leaders will move beyond visibility for its own sake and build a clearer view of what their organizations can sustain. A predictive health assessment gives them that view. It separates noise from signal, activity from progress and isolated performance from long-term strength.

In a market where pressure is rising and resources are limited, that distinction matters. Sales leaders cannot afford to wait until the forecast breaks to understand the health of the organization. They need to know where strength is building, where risk is emerging and where action will have the greatest impact. That is how analytics becomes more than reporting. It becomes a leadership advantage. smm

Dave Egloff is a distinguished vice president analyst in the Gartner Sales Practice who presented live on this subject and others at the Gartner CSO & Sales Leader Conference.