New Research: Sales Transformation Requires Sales Operations to Take on Leadership Role

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CSO Insight's newly released 2018 Sales Operations Optimisation Study finds that sales operations teams exist in the gap between taking the lead on new innovations and addressing old infrastructure issues.

LONDON, 6 August, 2018 – The 2018 Sales Operations Optimisation Study, a new report from CSO Insights, the research division of Miller Heiman Group, found that the majority of sales operations teams (63.9%) have a dedicated sales operations organisation. Nevertheless, sales operations' ability to be the catalyst for true sales transformation is hindered by the need to fix old infrastructure issues and outdated, tactical tasks.

The CSO Insights global survey of more than 300 senior sales managers, executives and sales operations professionals found that sales operations is heavily involved or took on a leadership role in 15 out of 16 sales transformation initiatives such as sales tool and technology management (47.8%), forecast and pipeline management (46.8%), seller performance metrics (45.2%) and sales process definition (44.3%).

"This study shows that sales operations, a long-established, yet broadly-varying discipline, is undergoing a period of marked change," said Seleste Lunsford, Managing Director of CSO Insights. "The end point may well be a bigger seat at the table and the ability to create a larger, more positive and more sustainable impact on sales performance."

The study highlights a number of areas where sales operations still struggles with existing infrastructure and processes. For example, organisations with a formal or structured approach to forecasting had significantly higher win rates (62.5%) than those organisations with a subjective or casual approach (49.9%). Yet, almost half (45.7%) of respondents to the study said they use a subjective or casual approach.

The study also provides an explanation for why the modest rise in CRM adoption rates seen since 2013 hasn't resulted in significant performance improvements. In organisations with a high rate of adoption (>75%), those with a formal or dynamic sale process out-performed organizations with only a random or informal sales process by 14.9% in win rates and 19.3% in quota attainment.

"In many organisations, sales operations own sales process definition, so this is an area where sales operations can take on a leadership role and quickly make a huge impact," said Lunsford. "By ensuring formal sales processes are codified in CRM, sales operations can drive higher adoption rates, increase the impact of CRM on efficiency and effectiveness, and improve tactical tasks such as forecasting."

CRM wasn't the only technology area where sales operations had yet to live up to its potential. Respondents to the study were using, on average, ten different sales tools and were preparing to deploy at least four more. Yet, despite this explosion in sales tool investments, only four of the tools named had adoption rates of greater than 50%. The study also found that sales operations had yet to accept the mantle of leadership when it came to identifying new technologies, such as AI-augmented selling tools.

Overall, the study offers a clear directive. Sales operations has created a foundation for future success, a foundation that must be built upon to digitally transform the sales organisation for ever greater levels of efficiency and effectiveness. Reaching your vision starts with using the results of this study to foster internal discussions around a future vision of sales success and how sales operations can pave the way.

The 2018 Sales Operations Optimisation Study is based on a global survey of more than 300 sales operations professionals (40.3% of respondents), senior sales managers (24.2%), and executives (19.8%). A broad range of industries were represented with the greatest representation coming from technology (37.7%), professional services (29.6%) and manufacturing (15.1%). While the majority of responses came from North America (60.2%), we also received a strong response from other regions: EMEA (23.4%), APAC (10.1%), and Latam (6.3%).

For more information, download the full report here

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