



A Survey of Sales Effectiveness:  
*Global Research on What Drives Sales Success*

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# Introduction



To gain a better understanding of the sales skills and behaviors required to succeed in today's marketplace, AchieveGlobal conducted a worldwide survey of more than one thousand sales professionals. We report the findings in this paper and draw several important conclusions around the sales activities that generate results.

This study focuses on two key areas of sales:

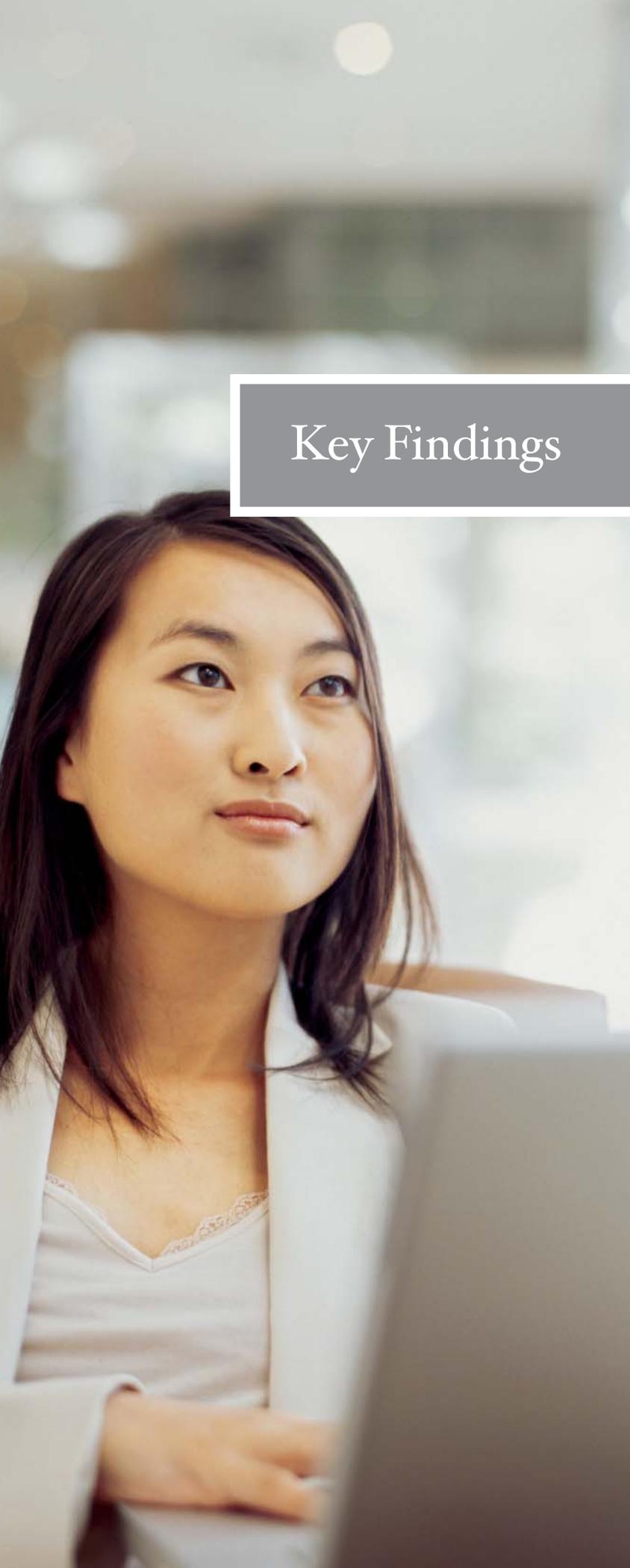
- First, sales professionals were asked to select the most important activities in each sales phase that they feel have the greatest impact on their success.
- Second, the study investigates the level and type of support sales professionals receive from their organization in terms of training, technology, and customer support.

In this report, we look at these two areas and compare the responses for different groups of sales professionals, including:

- Their sales position in the organization
- Their focus on new or existing business
- The size of the company and average size of their sales deals
- Their sales performance (ranked as high, medium or low by a number of factors)

Examining the responses by different groups yields interesting findings regarding what sales professionals say are the most important activities contributing to their success and the degree to which their organization provides critical sales support.

Specifically, new insights around the critical elements that affect the customer's experience were uncovered. The role of sales coaching and training, and its important influence on success, was also investigated.

A woman with long dark hair, wearing a white blazer over a light-colored top, is looking thoughtfully to the right. The background is a blurred office setting. A grey banner with the text 'Key Findings' is overlaid on the top right of the image.

## Key Findings

The selection of important sales activities differed for respondents based on their sales performance, deal size, and the training and coaching they received.

## Key Findings

The following bullets summarize the key findings from the survey:

- The sales phase that respondents said they had the most success with was “Establishing Relationships and Uncovering Needs” (36%), while the number one phase they found most challenging in the past year was “Developing New Business” (54%).
- There is a remarkable consistency in the selection of the three most critical activities in each sales phase, with some noted exceptions.
- Across each sales phase, there is more variation (less agreement) in “Developing Business,” “Presenting a Solution,” and “Closing a Sale.”
- There is less variation (more agreement) with “Preparing to Sell,” “Establishing Relationships,” “Following up after the sale,” and “Personal Selling Attributes.”
- There was tremendous agreement with the top three selections of activities in the Personal Sales Attribute category. These activities are primarily related to integrity: being direct and honest, treating others with respect, and demonstrating a higher ethical standard.
- When analyzing variation in activities by different groups, we see the most difference in responses by Deal Size (and Company Size), followed by a cluster of respondents that said their organization provides Training and Coaching, and then Sales Performance. There is also a high level of variation for certain countries.
- Respondents agreed most that their organization succeeds in “Clear Company Objectives,” “Fair Treatment of Salespeople,” and “Salespeople Meeting Operational Requirements.”
- They agreed least often that their organization “Used Metrics and Dashboards Effectively,” “Salespeople Followed the Sales Process,” and “SFA Made Selling Easier.” These organizational support activities, however, were more prevalent for high-performing salespeople.
- Sales leaders were more likely than outside sales professionals to agree that their organization supports the sales force with training, coaching, technology, equitable treatment, etc.
- Those focusing primarily on servicing existing customers performed better over the past year compared with those focused on developing new business.
- Sales managers responded similarly to salespeople, but outside sales professionals responded most differently from sales leaders and executives.
- The two most influential variables that defined the groups in the cluster analysis and had the strongest relationship with organizational support activities are Sales Coaching and Sales Training.
- Respondents in the substantial and moderate (High/Medium) coaching/training clusters were more likely to have larger deal sizes, reported a better sales performance over the past year, and generally came from larger companies.
- Similar to respondents reporting a larger deal size, the high and medium coaching/training groups were more likely to select those activities that are more strategic in nature. Those from the low coaching/training cluster were more likely to select activities that are tactical in nature.
- The coaching/training clusters are highly correlated with organizational support. That is, those organizations that offer training and coaching are more likely to support the sales force in other ways.

To better understand the relationship between sales activities and sales performance in today's economy, we asked respondents to rate on a scale of 1 to 5, with 1 being "completely disagree" and 5 being "completely agree", their agreement with statements regarding their own organization's support of their sales effort. Through our secondary research and interviews with sales organizations internationally, we identified the importance of an organization in supporting sales efforts through training, coaching, technology platforms, customer service, effective compensation and reward systems, and other policies and procedures that facilitate successful sales.

We analyze the relationship between the ratings of selected sales support activities by sales performance, sales position, country, and other variables. Respondents rated their agreement with the following support activities:

- Resources and tools to research customers/markets
- Formal sales processes
- Compliance with formal sales processes

- Sales training
- Sales coaching
- Company objectives that are clear to salespeople
- Fair treatment of salespeople by sales leaders
- Implementation of metrics and dashboards to track performance
- Effective sales-force automation
- Appropriate recognition and reward
- Sales compliance with operational/report requirements
- Service, expertise, and support provided by non-sales resources in the organization

The following table (Table 1) ranks the mean score (five-point scale) from highest (activity with highest level of agreement among respondents) to lowest (activity with least agreement). Respondents were in most agreement that their organization's objectives are clear to salespeople and in least agreement that their sales-force automation system makes their job of selling easier.

**Table 1. Level of Agreement With Statements Related to Organizational Support**

On a scale of 1 (completely disagree) to 5 (completely agree), to what extent do you agree with the following?	
	TOTAL
Our company objectives are clear to salespeople.	3.96
Our sales leaders treat salespeople fairly and equitably.	3.88
Salespeople in my organization meet operational requirements for reporting, completing necessary paperwork, attending meetings, etc.	3.80
People in no-sales roles provide the expertise and support needed to secure the sale and provide service to customers after the sale.	3.77
My organization provides resources to help salespeople to research and understand customers and their markets.	3.75
Salespeople in the company are appropriately recognized and rewarded for selling efforts.	3.69
My organization offers training that salespeople need to do their job.	3.53
Our salespeople receive valuable coaching from their sales managers.	3.53
We have a formal sales process that defines how we sell.	3.47
My organization effectively uses metrics or dashboards to manage sales performance.	3.40
Our salespeople consistently follow a formal sales process.	3.27
Our sales force automation system makes the job of selling easier.	3.19

We asked sales professionals to select the three activities that are most critical to their success in each of six sales phases. Throughout this report, we analyze respondents' selection of a series of sales behaviors and activities that are categorized by different phases of the selling process. Following are the phases within the sales process and the top three rated activities within each phase:

- **Preparing to sell**

- Have a complete understanding of the products and/or services being sold.
- Actively build and maintain a network of contacts.
- Understand the competition within your marketplace.

- **Developing business**

- Effectively use telephone/in-person/electronic means to secure appointments with decision makers.
- Generate referrals from the existing customer base and contact network.
- Prospect continuously to keep the pipeline full.

- **Establishing relationships**

- Ask questions to uncover customer needs and motives.
- Build trust during each customer interaction.
- Listen actively by expressing interest and asking follow-up questions.

- **Presenting a solution**

- Configure solutions to meet the unique needs of the customer.
- Clearly explain the links between solutions, benefits, and customer needs.
- Offer unique ideas and insights that prospects have not considered before.

- **Closing the sale**

- Resolve customer concerns including price objections.
- Stay alert to buying signals and ask for the business at the right time in the sales cycle.
- Look for innovative ways to meet client needs.

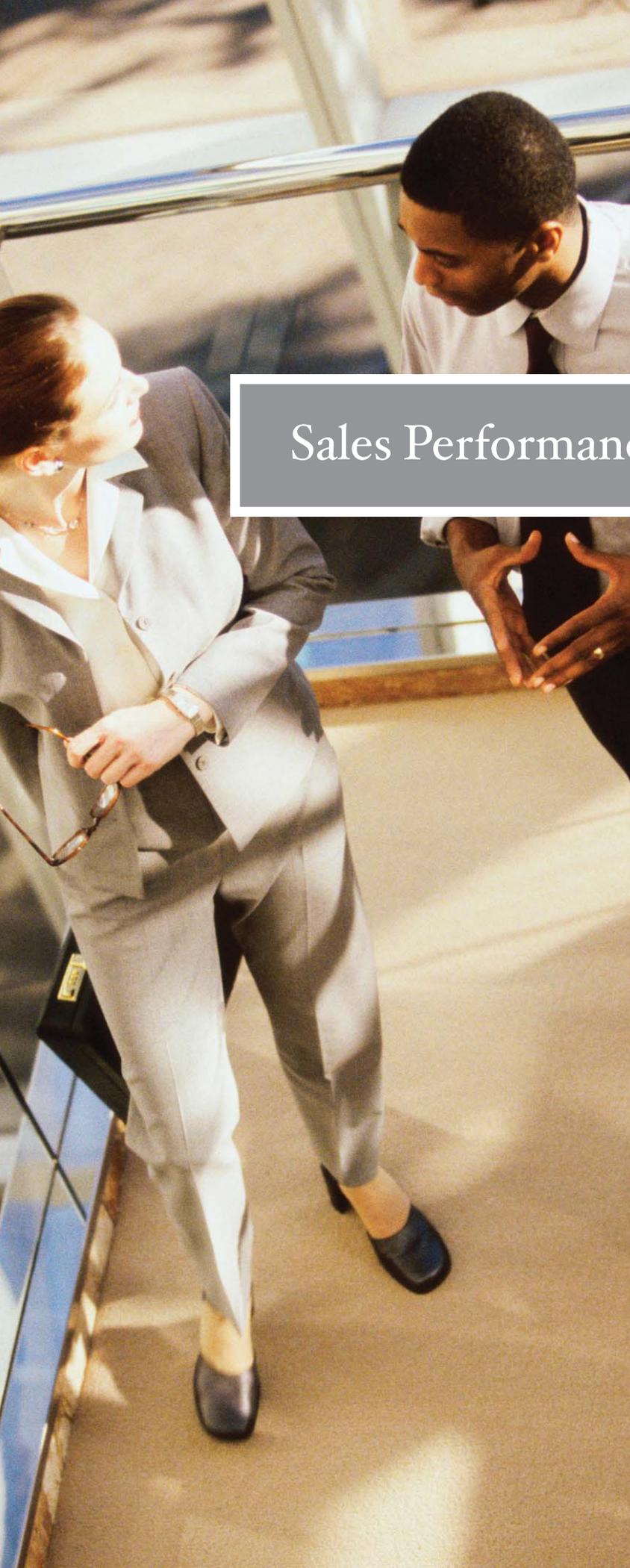
- **Following up after the sale**

- Establish regular contact with customers to maintain long-term relationships.
- Ensure that your organization delivers what was promised to the customer.
- Quickly resolve service issues and requests.

A seventh section includes activities that reflect overall personal selling attributes that are critical for success. The top three activities selected most often in this category are:

- Be direct and honest in all communication.
- Treat prospects, customers, and internal partners with respect.
- Maintain high ethical standards.

In the following sections, we examine the relationships of different groups of sales professionals with the sales activities they selected as being most important to their success. We also highlight any differences in the level of organizational sales support for each category of respondents.



## Sales Performance

We observed sales performance in two ways. The first involved creating an indicator of success based on the percent change in respondents' quota, average deal size and overall sales revenue.

The performance of sales professionals participating in the study is a key variable for comparing the relationship between the selection of sales activities and organizational support. More specifically, we would expect that specific sales activities tend to be selected as important success factors by higher performing salespeople, while those not performing as well tend to focus on other activities.

We observed sales performance in two ways. The first involved creating an indicator of success based on three questions relating to the percent change in quota, change in deal size, and change in overall sales revenue. These three questions were combined to create an index of overall individual sales performance for the past year. High Performers represent those who have a combined score that falls in the top third of the combined scores from the three questions, while Medium Performers fall in the middle third and Low Performers in the lowest third. This provides a comparison of respondents to others who answered the survey rather than to an industry or market benchmark.

The second method for observing success was merely to compare those respondents reporting an increase of more than 10% in sales growth from the prior year with those reporting more than a 10% decline in sales revenue.

Overall, there is a moderate relationship between sales performance and the priority of sales activities for certain phases of the sales process as measured by the performance indicator and change in sales revenue.

We would also expect that the performance of salespeople be related to organizational support, since organizational support should improve sales results. Again, as we show on the next page in table 2, there are relationships between performance and ratings of several selling-support activities.

- High performers were more likely to select the following as being critical to their success:
  - Posses an understanding of products/services being sold.
  - Have an in-depth knowledge of the customer's industry.
  - Identify new opportunities in existing accounts.
  - Conduct in-depth research of prospect organizations.
  - Ensure that the organization delivers what is promised.
  - Exhibit sales tenacity.
- Lower performers more often selected the following as one of their top three success factors:
  - Actively build and maintain a network of contacts.
  - Aggressively pursue leads.
  - Tell stories to illustrate important points.
  - Look for innovative ways to meet client needs.
  - Provide customers with ongoing advice.

**Table 2. Key Sales Activities Selected Most Often by High, Medium, and Low Performers**

Sales Phase	High Performers	Medium Performers	Low Performers
<b>Preparing to Sell</b>			
	Possess an understanding of products/services being sold.		Actively build and maintain a network of contacts.
	Have an in-depth knowledge of the customer's industry	Understand the competition within your marketplace.	Understand the competition within your marketplace.
<b>Developing Business</b>			
	Identify new opportunities in existing accounts.	Effectively use phone/in person/electronic means to secure appointments with decision makers.	Generate referrals from the existing customer base and contact network.
	Conduct in-depth research of prospect organizations.		Prospect continuously to keep the pipeline full.
			Agressively pursue leads
<b>Establishing Relationships</b>			
	Uncover needs the customer might not be aware of	Understand the customer's buying process.	Build trust during each customer interaction.
<b>Presenting a Solution</b>			
	Configure solutions to meet the needs of the unique customer.	Articulate business case to show financial benefit to customer.	Cleary explain the links between solutions, benefits, and customer needs.
	Offer unique ideas and insights that prospects have not considered before.		Tell stories to illustrate important points.
<b>Closing the Sale</b>			
	Stay alert to buying signals and ask for the business at the right time in the sales cycle.	Stay alert to buying signals and ask for the business at the right time in the sales cycle.	Look for innovative ways to meet client needs.
	Resolve customer concerns including price objections.		Effectively use internal resources to close the business.
<b>Following After the Sale</b>			
	Ensure that your organization delivers what was promised to the customer.	Quickly resolve service issues and requests.	Provide customers with ongoing advice and information.
<b>Personal Attributes</b>			
	Be direct and honest in all communication.	Be direct and honest in all communication.	Be direct and honest in all communication.
	Be appropriately persistent.		

Survey respondents were asked to select their most challenging sales phase and the phase where they have had the most success in the prior year. The following table (Table 3) shows the percent of responses by sales performance.

While a majority of all respondents said that developing new business was their most challenging phase, high performers were more likely to also mention “presenting a solution” and overall “personal attributes”. Lower performers had relatively more challenges with “closing a sale” in the prior year.

Both groups had success with “establishing relationships and uncovering needs”, but high performers were more often successful in “developing new business” when compared with low performers.

**Table 3. Most Challenging and Most Successful Sales Phases**

Selling Phase	MOST CHALLENGING PHASE		MOST SUCCESSFUL PHASE	
	HIGH PERFORMERS	LOW PERFORMERS	HIGH PERFORMERS	LOW PERFORMERS
	Preparing to Sell	7.1%	6.7%	3.9%
Developing New Business	50.6%	57.9%	16.0%	8.4%
Establish Relationships	11.7%	7.6%	39.2%	35.9%
Presenting a Solution	7.1%	3.7%	11.4%	15.6%
Closing The Sale	10.1%	17.0%	16.3%	13.4%
Following Up After the Sale	7.8%	5.1%	7.1%	10.4%
Personal Attributes	5.2%	1.8%	6.2%	8.5%

We examined the relationship between sales performance and agreement with the organizational support activities. The following table (Table 4) shows the mean score (on a five-point scale) for sales performance (high/low) together with change in revenue (increase/decline).

Here we see that sales performance and change in revenue are highly correlated both with each other and with agreement on seven organizational support activities. Overall, respondents that are more successful work in organizations that are more likely to provide:

- Coaching
- Clear company objectives
- Fair treatment
- Effective use of metrics/dashboards
- Meeting operational/reporting requirements
- Effective SFA
- Sales/service support from non-sales roles

Three of the seven highly correlated organizational support activities can be considered operational or technological in nature. The use of dashboards/metrics, meeting operational requirements, and an effective SFA rely more on systems and processes rather than behaviors.

**Table 4. Relationship Between Sales Performance and Agreement With Organizational Support Activities**

On a scale of 1 (completely disagree) to 5 (completely agree), to what extent do you agree with the following?				
	SALES PERFORMANCE		CHANGE IN REVENUE	
	High	Low	Increase >10%	Decline >10%
Salespeople receive valuable coaching from their sales managers.	3.7	3.4	3.6	3.3
Our company objectives are clear to salespeople.	4.1	3.8	4	3.7
Our sales leaders treat salespeople fairly and equitably.	4	3.7	4	3.6
Effectively use metrics or dashboards to manage sales performance.	3.5	3.2	3.5	3.2
Salespeople meet operational/reporting requirements.	3.9	3.7	3.9	3.5
Our SFA system makes the job of selling easier.	3.4	3	3.3	3.1
Non-sales roles provide the expertise/support needed.	3.9	3.6	3.9	3.6



## Latent Class Cluster Analysis: Coaching and Training

The LC approach assigns respondents into clusters or groups based on similar responses to the questions that have the most influence in distinguishing each group.

The Latent Class (LC) analysis is an extension of the traditional cluster analysis approach. In general, cluster analysis is the classification of similar objects into groups where the number of groups as well as their definitions are unknown. The LC approach identifies latent variables that explain the association among a set of observed variables. Each latent class, like each cluster, groups together similar cases that express similar preferences in other variables.

In the LC approach, respondents in the same latent class share a common joint probability distribution among certain variables. Although respondents in the same latent class (cluster) cannot be distinguished from each other based on their observed responses, they are similar to each other with respect to these underlying variables identified by the LC model. Respondents are classified into that group having the highest membership probability of belonging given the set of responses for that case.

This multivariate approach considers a group of variables to define a cluster, with some variables being more dominant and having more influence than others. We found in our analysis that there are two questions or variables in the survey that are most influential in defining the clusters that emerge: ratings for 1) *“Our salespeople receive valuable coaching from their sales managers”* and 2) *“My organization offers training that salespeople need to do their job.”*

Focusing on the two questions above reveals key differences between the clusters, which can be summarized as follows:

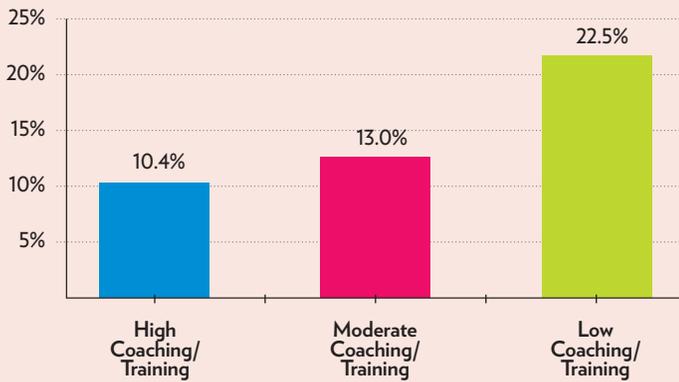
- **Cluster 1:** Substantial or “High” coaching / training of salespeople
- **Cluster 2:** “Moderate” coaching / training of salespeople
- **Cluster 3:** Minimal or “Low” coaching / training of salespeople

We examine the data here for each cluster as they represent unique groups with distinct preferences. The value of the LC approach is that it identifies those characteristics or variables that are responsible for defining distinct groups that represent different preferences on other variables.

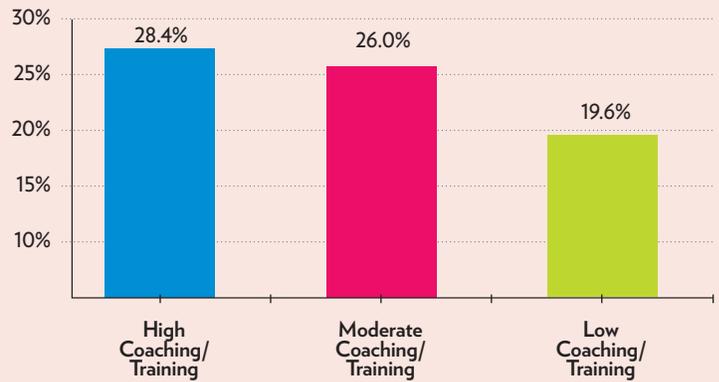
## The Impact of Training & Coaching

- Agreement with “my organization offers training that salespeople need to do their job,” and “our salespeople receive valuable coaching from their sales managers” identifies clusters that are highly related to overall organizational support and sales performance.
- Moderate and substantial (medium and high) coaching and training tends to be related to higher deal sizes, greater increases in personal sales revenue, and generally more overall success compared with those receiving minimal coaching and training.
- More than 22% of those reporting “low” training and coaching support reported a decline in sales revenue of more than 20% compared with only 10.4% of those reporting “high” training and coaching support.
- More than a quarter of all “high” and “moderate” clusters reported an increase in performance to quota of more than 10% compared to less than 20% of those respondents in the “low” coaching and training cluster.
- Change in average deal size is directly related to the amount of training and coaching received, that is, more respondents reported an increase in average—deal size for the “high” cluster compared with the “low” group.
- The clusters are also related to company size. A higher percentage of respondents from “high” and “medium” clusters are from larger companies compared with respondents from the “low” cluster.

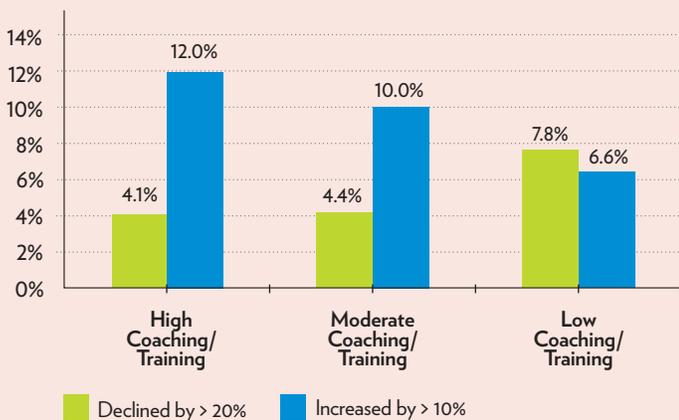
**Decline by >20% in Sales Revenue by Training/Coaching Cluster**



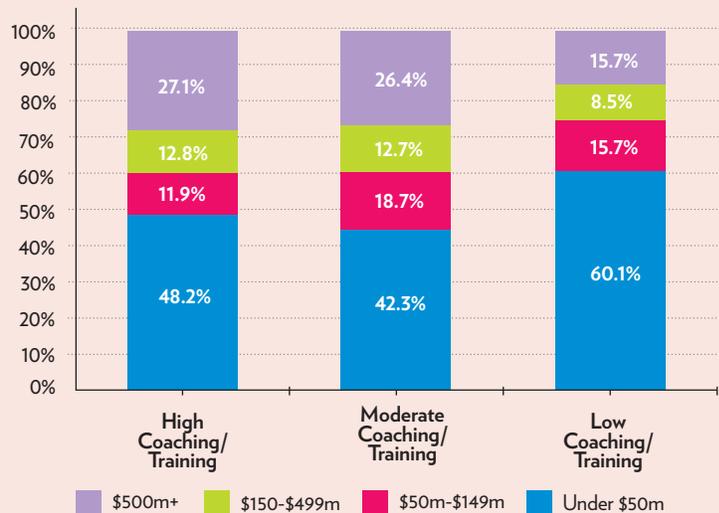
**Increase of 10% or More in Performance to Quota in Past Year by Training/Coaching Cluster**



**Change in Average Deal Size by Training/Coaching Cluster**



**Training/Coaching Cluster by Company Revenue**



The following analysis considers the relationship between the identified cluster and sales activities. Variation in the clusters, from high to low, should correlate with a variation in the selection of the top three activities deemed critical for sales success. We might expect that those with more training and coaching will more often select activities that are more strategic, rather than tactical in nature.

Respondents who get more support in terms of training and coaching are more likely to select the following as being an important contributing factor to their success:

- Goal setting
- Forecasting sales results (while they view that as less important than other types of planning activities)
- Having an in-depth knowledge of the customer's industry
- Uncovering client needs
- Creating a call strategy before meeting the customer
- Articulating a business case that shows how a solution will financially benefit the client

- Communicating solutions through engaging presentations and proposals
- Effectively using closing skills to gain commitment
- Maintaining high ethical standards
- Requesting client feedback

Those respondents reporting less coaching and training support (from the "low" cluster) more often mentioned the following as their top three critical success factors:

- Building a network of contacts
- Identifying all players in an account
- Aggressively pursuing leads
- Configuring the solution to meet the client's needs
- Crafting agreements that balance the needs of the customer and the organization
- Acting as the customer's advocate and taking responsibility to meet their needs

**Table 5. Key Sales Activities Selected by Respondents With Various Levels of Training and Coaching**

Sales Phase	High Training & Coaching	Medium Training & Coaching	Low Training & Coaching
<b>Preparing to Sell</b>			
	Have an in-depth knowledge of the customer's industry.		Actively build and maintain a network of contacts.
	Set personal sales goals.		
	Actively forecast and track sales results.		
<b>Developing Business</b>			
	Prospect continuously to keep the pipeline full.	Generate referrals from the existing customer base and contact network.	Use phone/electronic means to secure appointments
	Use social media to network and source leads.	Agressively pursue leads.	Identify new opportunities or buying centers in existing accounts
		Quickly and accurately qualify prospects.	
<b>Establishing Relationships</b>			
	Ask questions to uncover customer needs and motives.		Identify all the key players who participate in or influence the buying process.
	Create a call strategy before meeting with the customer or prospect.		
<b>Presenting a Solution</b>			
	Clearly explain the links between solutions, benefits, and customer needs.		Configure solutions to meet the unique needs of the customer.
	Articulate business case to show the financial benefit to customer.		
	Communicate solutions through engaging presentations and proposals		
<b>Closing the Sale</b>			
	Effectively use internal resources to close the business.	Look for innovative ways to meet client needs.	Stay alert to buying signals and ask for the business at the right time in the sales cycles.
			Craft agreements that balance the needs of customers with needs of organization.
<b>Following After The Sale</b>			
	Act as the customer's advocate by taking the responsibility to meet their needs.		Request customer feedback.
<b>Personal Attributes</b>			
	Maintain high ethical standards.	Treat prospects, customers, and internal partners with respect.	Treat prospects, customers, and internal partners with respect.

We also looked at the relationship between the coaching/training cluster and the sales professional's primary focus of either servicing existing customers, developing new business, or both.

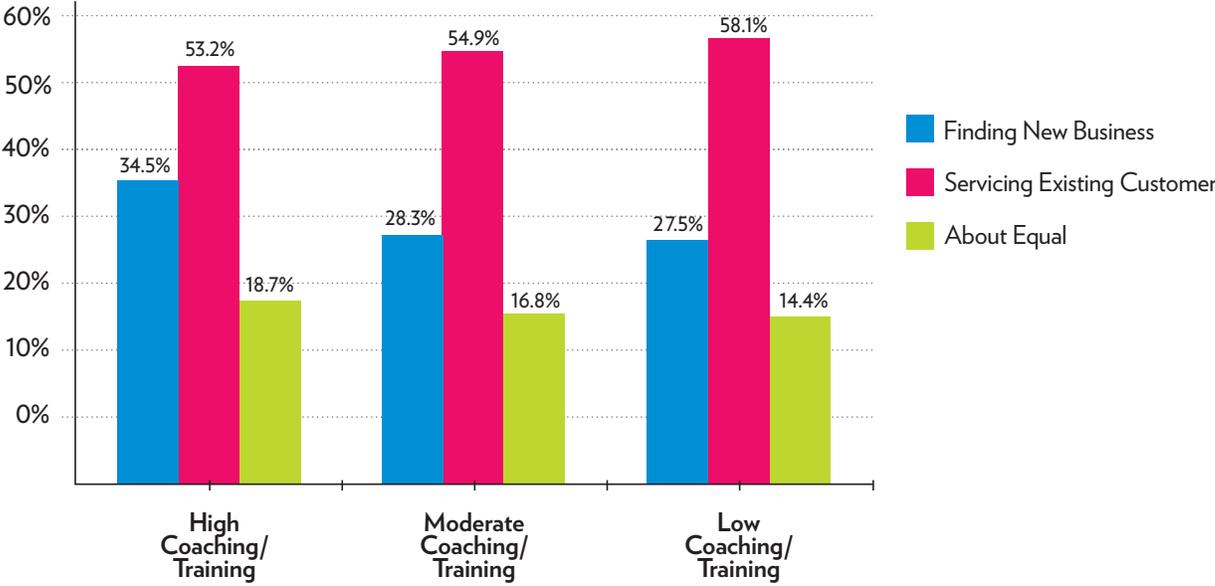
- Of those receiving low coaching and training, more than half (58.2%) spend most of their time servicing existing customers rather than finding new business.
- More than a third of respondents from the high coaching /training cluster are primarily engaged in finding new business (compared to 28% of respondents from both the moderate and low clusters).

We can say that there is a strong correlation between the level of coaching and training received by respondents and the organizational efficiency and support they receive from their organization. In fact, the cluster defined by training and coaching is a strong predictor of other organizational support activities.

The table on the following page (Table 6) shows the mean scores on a five-point scale, with 5 representing completely agree and 1 representing completely disagree. The mean or average rating for each activity is consistently higher as we move from low to moderate to high cluster.

This suggests that organizations that engage in higher levels of training and coaching will be more likely to support the sales organization in other ways.

**Coaching/Training Cluster by Primary Sales Activity**



**Table 6. The Relationship Between Training & Coaching and Organizational Support**

**On a scale of 1 (completely disagree) to 5 (completely agree), to what extent do you agree with the following?**

	RECEIVE COACHING / TRAINING		
	High	Moderate	Low
My organization provides resources to help salespeople to research.	4.7	3.6	2.5
We have a formal sales process that defines how we sell.	4.5	3.3	2.0
Our salespeople consistently follow a formal sales process.	4.2	3.1	1.9
My organization offers training that salespeople need to do their job.	4.7	3.4	1.9
Our salespeople receive valuable coaching from their sales managers.	4.7	3.4	1.8
Our company objectives are clear to salespeople.	4.8	4.0	2.6
Our sales leaders treat salespeople fairly and equitably.	4.7	3.8	2.7
My organization effectively uses metrics or dashboards to manage sales performance.	4.4	3.3	1.8
Our sales force automation system makes the job of selling easier.	4.4	3.0	1.7
Salespeople in the company are appropriately recognized and rewarded for selling efforts.	4.7	3.5	2.5
Salespeople in my organization meet operational requirements for reporting, completing necessary paperwork, attending meetings, etc.	4.6	3.7	2.8
People in non-sales roles provide the expertise and support needed to secure the sale and provide service to customers after the sale.	4.6	3.6	3.0

A photograph of two men in business suits shaking hands on a wooden floor in a modern building lobby. The man on the left is older, balding, and wearing a dark suit. The man on the right is younger, with dark hair, and wearing a light blue suit. They are standing on a polished wooden floor with a large glass door in the background. The scene is brightly lit, suggesting a professional and positive business interaction.

## Deal Size and Company Revenue

This section examines the relationship that company and deal size have with the importance of sales activities and organizational support.

This section examines the relationship between the average size of sales deals and preferences for sales activities and organizational support. In addition, we look at company revenue as a measure of company size to identify variation in responses for preferences of sales activities and organizational support.

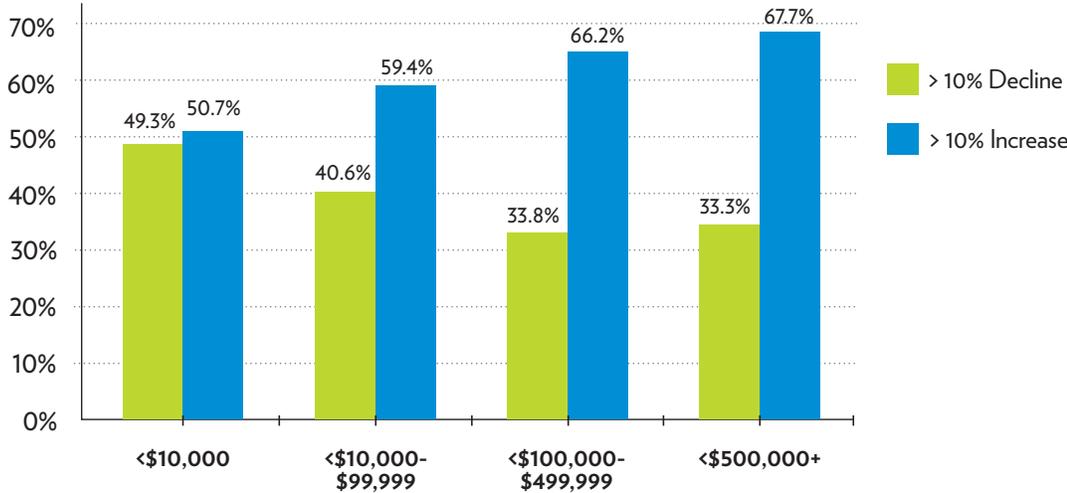
We examine deal size and company revenue together, since they are so closely related—that is, deal size is directly proportional to company size. While this is clearly not always the case, more often than not, larger deals (particularly those over \$500,000) are made by salespeople from larger companies.

As the figure below shows, deal size is also directly related to change in personal sales revenue over the past year. Respondents with larger deal sizes were more likely to have an increase in the percent change of sales revenue. More than two-thirds (68%) of sales professionals with an average deal size greater than \$500,000 experienced a greater than 10% increase in sales growth for the past year, compared with just 51% of those with average deals of less than \$10,000.

The size of the sales deal shows a higher level variation with sales activities compared with the other variables we’ve analyzed. The following table (Table 7) summarizes for small/large deals and small/large company size the activities most often selected by respondents from these groups. Deal size and company size are strongly related.

Findings show that respondents that reported larger deal sizes selected activities that are more strategic in nature. Small deals (under \$10,000) are generally less complex and require a different focus and set of activities than deals over \$100,000 or \$500,000.

**Deal Size by Change in Sales Revenue**



**Table 7. Key Sales Activities Selected by Respondents According to Deal Size and Revenue**

Sales Phase	Smaller Deal Size	Large Deal Size	Lower Company Revenue	Higher Company Revenue
<b>Preparing to Sell</b>				
	Possess an understanding of products/services being sold.	Develop formal strategies for territories/accounts	Understanding of products/services being sold	Develop formal strategies for territories/accounts
	Set personal goals	Accurately forecast and track sales results		Accurately forecast and track sales results
<b>Developing Business</b>				
	Effectively use phone/electronic means to secure appointments	Quickly and accurately qualify prospects	Aggressively pursue leads	Identify new opportunities in existing accounts
	Generate referrals from the existing customer/contacts	Conduct in -depth research of prospects	Use social media	Quickly and accurately qualify prospects
	Prospect continuously to keep the pipeline full			Conduct in-depth research of prospects
	Aggressively pursue leads			
	Use social media			
<b>Establishing Relationships</b>				
	Uncover needs the customer might not be aware of	Understand the customer's buying process	Build trust	
<b>Presenting a Solution</b>				
	Configure solutions to meet needs of customer	Explain links between solutions/benefits and customer needs	Highlight value of your organization compared to competitors	Explain links between solutions/benefits and customer needs
	Offer unique ideas and insight that prospects have not considered before	Articulate business case shows financial benefit to customer		Articulate business case shows financial benefit to customer
	Highlight value of your organization compared to competitors	Communicate solutions through engaging presentations		Articulate a business case that shows how a solution will financially benefit the customer's organization
<b>Closing the Sale</b>				
	Stay alert to buying signals/ask for the business at the right time	Craft agreements that balance needs of the customer & your organization		Craft agreements that balance needs of the customer & your organization
		Develop creative trade-off and alternatives during negotiations		Effectively use internal resources to close the business
		Effectively use internal resources to close the business		
<b>Following After The Sale</b>				
	Quickly resolve service issues and requests	Actively manage all post-sale interactions	Quickly resolve service issues and request	Act as customer's advocate by taking the responsibility to meet their needs
<b>Personal Attributes</b>				
	Be direct and honest	Navigate within our organization to secure needed resources	Be direct and honest	Navigate within our organization to secure needed resources
	Treat prospects/customers/internal partners with respect			Maintain high ethical standard

The size of sales deals showed no relationship with the level of support an organization offers to their salespeople with regard to training, sales automation, service support, coaching, etc. There is, however, differences for organizational support for different size companies. The following table (Table 8) shows statistical differences in ratings of organizational support by company size.

Larger companies are more likely to offer:

- A formal sales process
- Training
- Use of metrics/dashboards to manage sales performance
- An effective sales-force automation

Smaller companies are more likely to agree that:

- People in non-sales roles provide expertise and support needed to secure the sale and provide service to customers after the sale

**Table 8. The Relationship Between Company Revenue and Organizational Support**

On a scale of 1 (completely disagree) to 5 (completely agree), to what extent do you agree with the following?	Company Revenue			
	Less Than \$50m	\$50m-149m	\$150m-\$499m	\$500m+
We have a formal sales process that defines how we sell.	3.2	3.5	3.6	3.7
My organization offers training that salespeople need to do their job.	3.3	3.5	3.5	3.8
My organization effectively uses metrics or dashboards to manage sales performance.	3.1	3.4	3.7	3.7
Our sales-force automation system makes the job of selling easier.	3	3.2	3.4	3.4
People in non-sales roles provide the expertise and support needed to secure the sale and provide service to customers after the sale.	3.8	3.7	3.7	3.6



## Sales Position

The level of support sales professionals receive from their company varies depending on their position in the sales organization.

We asked respondents to identify their position in the sales organization. About 13% of respondents are inside sales professionals, while 36.8% are outside sales, 27% sales managers, and the remaining 22.5% are sales directors or above, including VPs and executives.

Since many of the respondents are from smaller companies, the profile of the sales manager in this study is very close to that of the salesperson—that is, many sales managers in smaller organizations either have a territory and revenue responsibility themselves or because there are fewer management layers, they are closer to the salesperson. Consequently, there is little to no difference in the responses between the salesperson and their manager for many variables. We have highlighted those incidences where there are significant differences between outside salespeople and their manager.

In addition, we do not report inside salespeople responses except for the rare instances where there are significant differences between their responses and outside salespeople. There are, however, often significant differences between the salesperson and the sales leader. As such, our analysis primarily focuses on these findings.

When comparing the selection of the top three important activities, the position of the sales professional mattered little. There is a greater difference in the response of sales professionals depending on their position when we examine their ranking of various types of organizational support.

The following table (Table 9) show the top three selections and any other significant differences in responses of outside sales professionals compared with sales executives for activities in each sales phase.

- **Preparing to Sell** – Sales leaders were more likely to select “in-depth knowledge of customer’s industry” (53%) compared to outside sales professionals (38%)
- **Developing Business** – Sales professionals’ ranking of the top three most critical activities differed from sales leaders, with sales professionals placing more emphasis on identifying new opportunities in existing accounts” compared with sales leaders.
- **Establishing Relationships** – Outside sales professionals rated “expressing interest and asking follow-up questions” and “establishing rapport with shared

interests in outside topics” more highly than sales leaders, while sales leaders said that “understanding the customer’s buying process” was more important.

- **Presenting a Solution** – Outside sales professionals gave more importance to “configuring solutions to meeting client needs”, while sales leaders said “telling stories to illustrate important points” was more of a priority.
- **Closing a Sale** – Sales executives were more likely to say that “developing creative tradeoffs and alternatives during negotiations” was a critical success factor compared with outside salespeople.

**Table 9. Key Sales Activities Selected by Outside Salespeople vs. Sales Leaders**

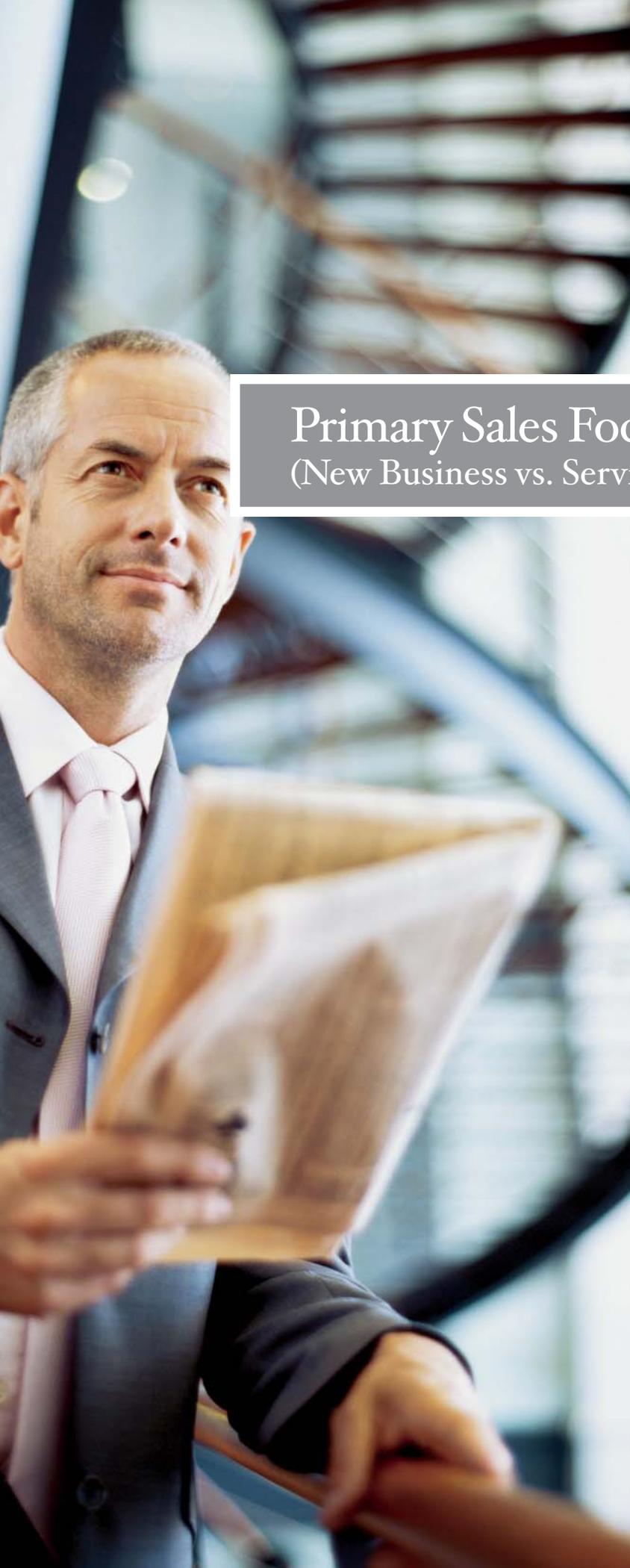
Sales Phase	Outside Salespeople	Sales Leaders
Preparing to Sell		
	Actively build and maintain a network of contacts.	Have an in-depth knowledge of the customer's industry.
	Understand the competition within your marketplace.	
Developing Business		
	Identify new opportunities and or buying centers in existing accounts.	Generate referrals from the existing customer base contact network.
		Prospect continuously to keep the pipeline full.
Establishing Relationships		
	Listen actively by expressing interest and asking follow-up questions.	Understand the customer's buying process.
	Establish rapport with shared interests in non-work topics.	
Presenting a Solution		
	Configure solutions to meet the unique needs of the customer.	Tell stories to illustrate important points.
Closing the Sale		
	Stay alert to buying signals and ask for the business at the right time in the sales cycle.	Look for innovative ways to meet client needs.
		Develop creative trade-offs and alternatives during negotiations.
Following After The Sale		
	Establish regular contact with customers to maintain long-term relationships.	Ensure that your organization delivers what was promised.
Personal Attributes		
	Treat prospects, customers, and internal partners with respect.	Maintain high ethical standards.

The following table (Table 10) shows the significant differences in responses between salespeople, managers, and leaders for specific types of organizational support. The table reports differences in mean or average scores (on a five-point scale), as well as differences in the percentage of responses rating a 4 or 5 (strongly agree/agree) and a 1 or 2 (strongly disagree/disagree).

- More managers than salespeople believed that their organization has a formal sales process that defines how they sell.
- Sales leaders are more likely to agree that their salespeople actually follow that process.
- Both managers and leaders are more likely than sales people to agree with the statement: "Sales professionals in my organization receive valuable coaching from sales managers."
- Similarly, leaders are more likely to agree that company objectives are clear to salespeople and that sales leaders treat salespeople fairly and equitably compared with salespeople.
- Compared with outside salespeople, sales executives were more likely to say that salespeople are recognized and rewarded for their efforts, and that non-salespeople provide expertise and support to win sales and provide after-sales service.

**Table 10. The Relationship Between Sales Position and Organizational Support**

On a scale of 1 (completely disagree) to 5 (completely agree), to what extent do you agree with the following?			
	Salesperson	Manager	Leader
We have a formal sales process that defines how we sell.	3.3	3.6	3.4
Our salespeople continuously follow a formal sales process.	3.1	3.3	3.3
Our salespeople receive valuable coaching from their sales managers.	3.3	3.6	3.7
Our company objectives are clear to salespeople.	3.8	3.9	4.1
Our sales leaders treat sales people fairly and equitably.	3.7	3.8	4.1
Salespeople in the company are appropriately recognized and rewarded for selling efforts.	3.5	3.7	3.9
People in non-sales roles provide expertise/support to win sale and provide after-sales service.	3.7	3.8	3.9

A man in a dark suit and light pink tie is shown from the chest up, looking slightly to the right with a thoughtful expression. He is holding a large, light-colored folder or stack of papers. The background is a blurred office interior with a window showing blinds.

## Primary Sales Focus (New Business vs. Servicing Existing Business)

Those respondents who said they are primarily responsible for servicing new customers performed better overall compared with those developing new business.

More than half (55%) of all sales professionals responding to the survey said that their primary activities focused on servicing existing customers. Just 28% said that they are primarily responsible for finding new business, while 17% said they are tasked equally with finding new business and servicing existing customers.

Those respondents who said they are primarily responsible for servicing new customers performed better overall compared with those developing new business. Nearly two-thirds (65%) of those servicing existing customers reported sales revenue growing by more than 10% in the previous year compared with 51% of sales professionals responsible for finding new business.

We sought to test whether or not there is a variation in responses by salespeople focused on different objectives, since the strategies and activities should vary for those developing new business compared with those attempting to retain and grow current accounts.

The table (Table 11) on the next page highlights the significant differences in responses of salespeople focused on servicing existing customers compared with those finding new business for each sales activity. Salespeople focused on servicing existing customers (farmers) were more likely to say that the following activities were critical to their success:

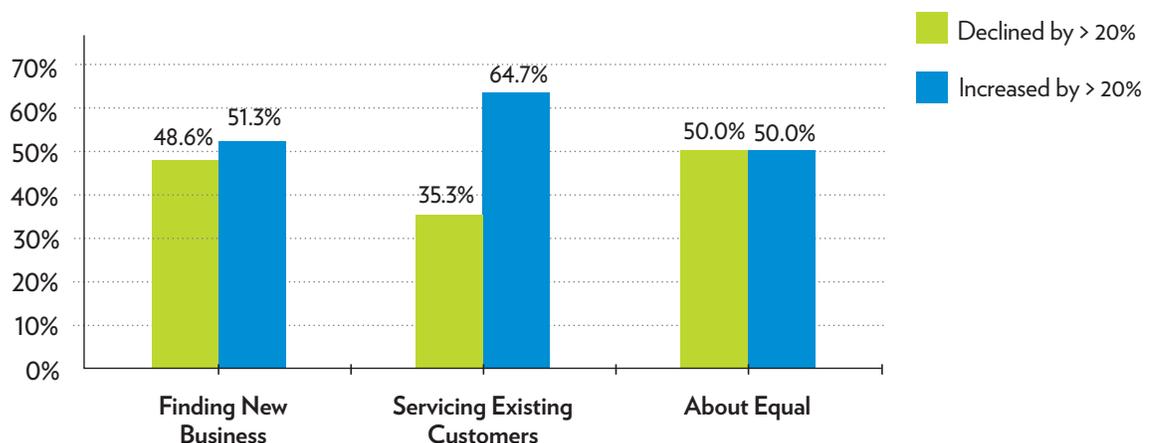
- Understanding strategy of your own organization
- Identifying new opportunities/buying centers in existing accounts

- Using social media to network
- Understanding the customer’s buying process
- Creating a call strategy before meeting the customer
- Crafting agreements that balance the needs of the customer with own organization

Salespeople focused on finding new business (hunters) placed more emphasis than those servicing existing customers on the following:

- Prospecting continuously to keep the pipeline full
- Identifying all key players who influence buying process
- Articulating a business case that shows how a solution will benefit the customer’s organization
- Effectively using closing skills to gain customer commitment to complete the sale
- Acting as the customer’s advocate by taking responsibility to meet their needs

### Primary Activity by Sales Revenue



**Table 11. Key Sales Activities Selected by Respondents Who Focus On Finding New Business vs. Servicing Existing Customers**

Sales Phase	Finding New Business	Servicing Existing Customers
Preparing to Sell		
	Have in-depth knowledge of the customer's industry.	Understand the competition within your marketplace.
		Understand the strategy of selling organization and the salesperson's role.
Developing Business		
	Prospect continuously to keep the pipeline full.	Generate referrals from the existing customer base and contact networks.
		Identify new opportunities in existing accounts.
		Use social media to network and source leads.
Establishing Relationships		
	Ask questions to uncover customer needs and motives.	Build trust during each customer interaction.
	Identify key players in the buying process.	Ask questions to uncover needs and motives.
		Create a call strategy before meeting with customer
Presenting a Solution		
	Clearly explain the links between solutions, benefits, and customer needs.	Configure solutions to meet the unique needs of the customer.
	Articulate business case that shows how solution will financially benefit the customer.	
Closing the Sale		
	Effectively use closing skills to gain customer commitment to complete the sale.	Look for innovative ways to meet client needs.
		Craft agreements that balance the needs of the customer with the needs of your organization.
Following After The Sale		
	Act as the customer's advocate by taking the responsibility to meet their needs.	
Personal Attributes		
	Treat prospects, customers, and internal partners with respect.	Maintain high ethical standards.

The image features a low-angle, upward-looking view of a modern glass skyscraper. The building's facade is composed of a grid of dark metal frames and large glass panels, some of which are tinted blue. The sky is a pale, clear blue. On the right side of the image, there is a solid, vibrant red vertical band. A white rectangular box with a thin black border is positioned in the upper-middle section of the image, containing the word "Conclusion" in a white serif font.

# Conclusion

Sales success is created by providing differentiated and exceptional customer experiences throughout the entire sales and post-sales process. This is accomplished first by understanding the needs of customers and then bringing the resources necessary to meet and exceed those needs. Uncovering and meeting customers' needs together with executing at each defining moment are the hallmarks of a successful sales process.

We looked at 45 activities across six phases of the sales process, each of which represents a set of "defining moments" that shapes the customer's impression of the organization. We found that the activities that lead to successful sales outcomes are those that involve both strategy and skills that add value at every "defining moment"—that is, at every opportunity for a buyer to judge your organization.

Depending on the performance of sales and service behaviors, buyers will judge their experience as being positive, neutral, or negative. Excelling at each sales and service effort will produce a consistent positive experience across each defining moment. The balance of how all these defining moments add up are what leads to customers perceiving the salesperson as product sellers, friendly visitors, or trusted business advisors. The aggregation of these defining moments is a critical input to the customer's decision-making process and their overall experience.

In addition to sales skills, the resources and support an organization devotes to the sales and service effort are directly related to the customer experience and, thus, company performance. In this research, the activities sales professionals selected as most important to their own success differed by the level of coaching and training they received. In fact, we found that organizations providing more sales support in addition to training and coaching performed better overall and more often emphasized those sales activities that had the most impact on sales success.

Even with the right sales skills and sufficient organizational support, meeting customer needs and providing an exceptional experience at each defining moment is not possible without strong leaders who set expectations and align all systems to the overall strategy. Indeed, our research has shown all of these factors must work in tandem—that is, the combination of mastering critical sales skills together with leadership and organizational support are critical elements to retaining and growing the customer relationship over the long term.

# Appendix

## Appendix 1: Correlation Coefficients for Sales Activities

The following is a correlation coefficient matrix that shows the strength of the relationship between each pair of activities. The relationship between two variables is stronger as the coefficient increases. Any number above .5 typically represents a strong correlation.

The highlighted cells in the table represent those relationships that are above .5. Of the 18 cells with a correlation coefficient above .5, 12 pairs (cells) involve either the training or coaching activity. This suggests that high ratings on training and coaching have a significantly positive relationship with high ratings on other organizational support activities.

As the correlation coefficient matrix shows, Coaching is highly correlated with “clear company objectives” (.573) and training shows a strong relationship with “providing resources and tools to help sales people research/understand customers” (.542), “a formal sales process” (.542), and the “compliance with the sales process” (.552).

Two other strong relationships identified in the matrix is between “recognition and reward” and “fair treatment of sales people” (.589), and between “our SFA is effective” and “effective use of dashboards and metrics” (.624).

	16.1 My organization provides resources and tools to help salespeople to research and understand customers and their markets.	16.2 We have a formal sales process that defines how we sell.	16.3 Our salespeople consistently follow a formal sales process.	16.4 My organization offers training that salespeople need to do their job.	16.5 Our salespeople receive valuable coaching from their sales managers.	16.6 Our company objectives are clear to salespeople.	16.7 Our sales leaders treat salespeople fairly and equitably.	16.8 My organization effectively uses metrics or dashboards to manage sales performance.	16.9 Our sales-force automation system makes the job of selling easier.	16.10 Salespeople in the company are appropriately recognized and rewarded for selling efforts.	16.11 Salespeople in my organization meet operational requirements for reporting, completing necessary paperwork, attending meetings, etc.	16.12 People in non-sales roles provide the expertise and support needed to secure the sale and provide service to customers after the sale.
16.1	1											
16.2	.455	1										
16.3	.418	.763	1									
16.4	.542	.564	.552	1								
16.5	.494	.521	.520	.685	1							
16.6	.486	.390	.381	.486	.573	1						
16.7	.445	.243	.273	.380	.507	.540	1					
16.8	.384	.532	.469	.514	.514	.454	.397	1				
16.9	.481	.498	.516	.544	.511	.404	.423	.624	1			
16.10	.464	.324	.363	.447	.483	.491	.589	.398	.476	1		
16.11	.442	.389	.355	.424	.458	.495	.458	.427	.410	.438	1	
16.12	.409	.287	.278	.348	.393	.354	.476	.316	.407	.468	.440	1

## Appendix 2: Key Sales Activities and Their Relationship to Numerous Variables

Preparing to Sell	Total	Average Deal Size				Company's Annual Revenue			
		<\$10,000	\$10,000 - \$99,999	\$100,000 - \$499,999	\$500,000+	Less Than \$50m	\$50m-\$149m	\$150m-\$499m	\$500m+
Have a complete understanding of the products and/or services being sold.	70.1%	1(76.8%)	1(68.7%)	1(64.1%)	1(60.2%)	1(77.1%)	1(65.0%)	1(63.0%)	1(66.0%)
Actively build and maintain a network of contacts.	52.6%	2	2	2	3	2	2	2	2
Understand the competition within your marketplace.	43.9%	3	3	3	2	3	3		3
Have an in-depth knowledge of the customer's industry.	41.3%							3	
Develop formal strategies for territories, accounts, and opportunities.	30.5%	24.6%	33.2%	33.6%	39.6%	22.4%	38.3%	38.7%	36.2%
Set personal sales goals.	26.7%	32.9%		22.3%	22.5%				
Understand the strategy of your organization and salesperson's role in its execution.	23.0%								
Accurately forecast and track sales results.	11.8%					8.7%	14.0%	17.5%	

Developing Business	Total	Average Deal Size				Company's Annual Revenue			
		<\$10,000	\$10,000 - \$99,999	\$100,000 - \$499,999	\$500,000+	Less Than \$50m	\$50m-\$149m	\$150m-\$499m	\$500m+
Effectively use telephone/in person/electronic means to secure appointments with decision makers.	48.1%	1(55.3%)	2	1	3(39.7%)	1	2	1	3
Generate referrals from the existing customer base and contact network.	49.9%	3(50.1%)	1(49.2%)	2(53.8%)	37.8%	2	1	2	
Prospect continuously to keep the pipeline full.	44.6%	2(51.6%)	3	3	40.5%				
Identify new opportunities in existing accounts.	44.1%				2	3(41.0%)	3		2(51.1%)
Quickly and accurately qualify prospects.	41.1%	36.7%			1(51.4%)	38.3%		3	1(49.5%)
Aggressively pursue leads.	35.8%	45.3%	32.4%	32.3%	29.0%	42.4%		26.7%	31.5%
Conduct in-depth research of prospect organizations.	21.4%	10.7%	21.5%	29.1%	42.2%	15.6%	25.7%	27.6%	24.1%
Use social media to network and source leads to secure appointments with decision makers.	14.9%		17.9%		9.8%	16.3%	16.0%	17.0%	8.3%

Sales Position		Sales Focus		Sales Performance			Receiving Coaching/Training		
Outside Sales	Sales Dir./Exec.	Finding New Business	Servicing Existing Customers	High	Medium	Low	High	Moderate	Low
1	1	1	1	1(73.5%)	1	1(66.1%)	1	1	1
2	3	2	2	2(47.2%)	2	2(60.0%)	2(44.4%)	2	2(56.2%)
3			3		3	3	3	3	3
38.4%		3		3			34.6%		41.3%
	2(53.1%)							38.3%	
							33.5%		24.2%
		15.6%	22.1%						
							13.4%	12.8%	5.3%

Sales Position		Sales Focus		Sales Performance			Receiving Coaching/Training		
Outside Sales	Sales Dir./Exec.	Finding New Business	Servicing Existing Customers	High	Medium	Low	High	Moderate	Low
1	1	2	2	2	1	3	2	2	1
	3	3	1	3	2	1	3	1	3
3	2	1(58%)	36.8%			2	1		
2		31.9%	3(48.0%)	1(50.0%)		41.0%		3	2
					3			3	
				30.0%	35.3%	41.6%			
				24.5%	25.1%	15.8%	39.3%	33.1%	28.1%
							21.4%		13.1%

Establish Relationship	Total	Average Deal Size				Company's Annual Revenue			
		<\$10,000	\$10,000 - \$99,999	\$100,000 - \$499,999	\$500,000+	Less Than \$50m	\$50m-\$149m	\$150m-\$499m	\$500m+
Ask questions to uncover customer needs and motives.	59.5%	2	1	2	1	2	1	1	1
Build trust during each customer interaction.	57.4%	1	2	1	2	1(62.0%)	2	2(50.3%)	2
Listen actively by expressing interest and asking follow-up questions.	47.9%	3		3	3	3	3	3	3
Identify all the key players who participate in, or influence, the buying process.	42.4%		3						
Uncover needs the customer might not be aware of.	33.3%	37.0%			26.0%				
Understand the customer's buying process.	27.6%	22.6%	28.1%	28.4%	39.7%				
Establish rapport with shared interests in non-work topics.	14.7%								
Create a call strategy before meeting with the customer or prospect.	17.1%								

Presenting a Solution	Total	Average Deal Size				Company's Annual Revenue			
		<\$10,000	\$10,000 - \$99,999	\$100,000 - \$499,999	\$500,000+	Less Than \$50m	\$50m-\$149m	\$150m-\$499m	\$500m+
Configure solutions to meet the unique needs of the customer.	63.7%	1(65.0%)	1	2(55%)	1	1	1	2	2
Clearly explain the links between solutions, benefits, and customer needs.	63.5%	2(58.4%)	2(64.4%)	2(69.6%)	2(69.6%)	2(60.3%)	2	1	1(70.1%)
Offer unique ideas and insights that prospects have not considered before.	46.3%	3	3	3	3	3	3	3	3
Articulate a business case to show how a solution will financially benefit the customer's organization.	39.2%	35.0%	44.3%				33.0%	34.0%	36.1%
Highlight the value of your organization as compared to competitors.	36.8%	42.6%			27.0%	39.0%			29.6%
Communicate solutions through engaging presentations and proposals.	31.6%	28.7%	28.1%	30.4%	3(43.2%)				
Tell stories to illustrate important points.	18.8%								

Sales Position		Sales Focus		Sales Performance			Receiving Coaching/Training		
Outside Sales	Sales Dir./Exec.	Finding New Business	Servicing Existing Customers	High	Medium	Low	High	Moderate	Low
1	1	1	2	1	1	1	1	1	1
2	2	2	1	2	2	2	2	2	2
3(54.5%)	3(45.7%)	3	3	3	3	3	3	3	3
		47.5%	38.5%				38.8%		48.9%
							37.6%	34.0%	25.7%
24.6%	34.1%	20.6%	29.3%						
16.1%	8.5%								
							21.7%		13.1%

Sales Position		Sales Focus		Sales Performance			Receiving Coaching/Training		
Outside Sales	Sales Dir./Exec.	Finding New Business	Servicing Existing Customers	High	Medium	Low	High	Moderate	Low
1(67.8%)	1(59.1%)	2	1	1	1	2	2(58.0%)	1	1(74.0%)
2	2	1	2	2	2	1	1	2	2
3	3	3	3	3		3	3	3	3
					3		41.9%	37.4%	32.9%
								31.0%	
							40.0%		27.0%
14.8%	21.3%			15.3%	19.1%	22.0%			

Close the Sale	Total	Average Deal Size				Company's Annual Revenue			
		<\$10,000	\$10,000 - \$99,999	\$100,000 - \$499,999	\$500,000+	Less Than \$50m	\$50m-\$149m	\$150m-\$499m	\$500m+
Resolve customer concerns including price objections.	63.4%	1	1	2	1	1	1	1	1
Stay alert to buying signals and ask for the business at the right time in the sales cycle.	51.5%	2(57.4%)	2(55.8%)	3(45.5%)	44.1%	3	2	2	3
Look for innovative ways to meet client needs.	50.0%	3	3	1	2	2	3	3	2
Effectively use closing skills to gain customer commitment to complete the sale.	48.6%								
Craft agreements that balance the needs of the customer with the needs of your organization.	38.2%	28.4%			3(45.9%)	32.0%	43.8%	43.8%	
Develop creative trade-offs and alternatives during negotiations.	28.2%	22.5%	25.2%	35.7%	35.4%	25.1%	35.7%		
Effectively use internal resources to close the business.	20.0%	13.8%	19.5%	27.6%	26.7%	16.1%	20.4%	33.4%	29.8%

Following Up After the Sale	Total	Average Deal Size				Company's Annual Revenue			
		<\$10,000	\$10,000 - \$99,999	\$100,000 - \$499,999	\$500,000+	Less Than \$50m	\$50m-\$149m	\$150m-\$499m	\$500m+
Establish regular contact with customers to maintain long-term relationships.	66.1%	1	1	1	1	1	2	2	1
Ensure that your organization delivers what was promised to the customer.	62.4%	3	2	2	2	2	1	1	2
Quickly resolve service issues and requests.	45.7%	2(59.2%)	3(53.9%)	3(49.0%)	34.2%	3	3	3	3
Provide customers with ongoing advice and information.	34.2%								
Act as the customer's advocate by taking the responsibility to meet their needs.	31.3%				3	27.4%	35.7%	32.1%	35.6%
Actively manage all post-sale interactions with the customer.	26.8%	23.0%		33.0%					
Request customer feedback.	26.5%								

Sales Position		Sales Focus		Sales Performance			Receiving Coaching/Training		
Outside Sales	Sales Dir./Exec.	Finding New Business	Servicing Existing Customers	High	Medium	Low	High	Moderate	Low
1	1	1	1	1	1	1	1	1	1
2	2	2	2	2	2		3	3	2
3	3		3	3(45.8%)	3	2(55.5%)		2	3
		3(53.3%)	43.3%			3	2(56.8%)	46.0%	39.2%
	37.5%	31.1%	40.3%				31.7%	40.2%	42.5%
25.2%									

Sales Position		Sales Focus		Sales Performance			Receiving Coaching/Training		
Outside Sales	Sales Dir./Exec.	Finding New Business	Servicing Existing Customers	High	Medium	Low	High	Moderate	Low
1	2	1	1	12	1	1	1	1	1
2	1	2	2	1(67.2%)	2	2(54.3%)	2	2	2
3	3	3	3	3	3	3	3	3	3
					29.2%	39.1%			
		38.5%	30.8%				26.6%	32.1%	36.5%
							33.8%		
								25.3%	19.6%

Personal Attributes	Total	Average Deal Size				Company's Annual Revenue			
		<\$10,000	\$10,000 - \$99,999	\$100,000 - \$499,999	\$500,000+	Less Than \$50m	\$50m-\$149m	\$150m-\$499m	\$500m+
Be direct and honest in all communication.	62.3%	1(66.4%)	1	1	1	1(65.1%)	1(63.8%)	2(51.8%)	1(59.7%)
Treat prospects, customers, and internal partners with respect.	55.8%	2(64.7%)	2	2	2(46.8%)	2	2	1	3
Maintain high ethical standards.	47.1%	3	3	3	3	3(45.3%)	3		2(57.1%)
Invest the time and effort needed to get the job done.	42.0%							3	
Exhibiting sales tenacity.	32.0%								
Remain optimistic about future success when faced with setbacks.	22.4%								
Take an organized selling approach.	22.1%					11.7%	11.1%	22.9%	18.1%
Successfully navigate within your organization to secure needed resources.	16.4%	9.3%	17.0%	25.3%	23.7%				

Sales Position		Sales Focus		Sales Performance			Receiving Coaching/Training		
Outside Sales	Sales Dir./Exec.	Finding New Business	Servicing Existing Customers	High	Medium	Low	High	Moderate	Low
1	1	1	1	1	1	1	1	1	1
2(60.5%)	2(52.0%)	2	2	2	2	2	3	2	2
3	3	3	3	3	3	3	2(55.5%)	3	3(40.7%)
				36.2%	31.2%	28.6			

### Appendix 3: Research Process and Demographics

An online survey, launched in August 2010, was completed by a panel of 875 sales professionals from the US (550), Mexico (50) UK (100), Germany (100), Singapore (25), and Australia (50), and an additional 170 respondents selected from 17 other countries.

Of the 170 additional respondents, 43% are from India, 15% from Portugal, and the remaining 58% from 15 other countries.

Respondents tend to be more tenured sales people from smaller companies operating in both a business-to-business and business-to-consumer capacity. They are more likely to focus on servicing existing customers, and they are evenly split between sales people and sales managers or executives.

We surveyed business-to-business sales professionals from a variety of industries that are inside sales people (13%), outside sales people (37%), sales managers (27%) and sales leaders (22%). About 46% of respondents are engaged in business to business only selling while 54% sell both to businesses and consumers.

Of the 1,045 respondents, 38.5% have fewer than 10 years experience in selling, 32% have 10 to 20 years, and 29% of respondents have 20 or more years of sales experience.

To identify if sales professionals would respond differently, depending on their responsibilities, we asked them to tell us if they are primarily involved in “Finding New Business” (28%), “Servicing Existing Customers” (54.9%), or involved about equally in both “New and Existing Business” (16.9%).

Sales professionals responding to the survey represent a wide variety of industries and company size. Reflecting the general population of business-to-business companies, 57% of respondents are from companies with less than \$100 million in revenue, 20% reported revenues of \$100 million to \$500 million, and 17% are from companies with more than \$1 billion in revenue.

For all of these demographic groups of sales professionals, we asked them to select the three sales related activities for each phase of a sales cycle—from prospecting to following up after the sale—that contributed most to successful sales outcomes. We then asked respondents to rate the level of support activities they received from their organization in their day-to-day sales efforts.



## About the Contributors

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## About AchieveGlobal

In the 21st century, the level of human skills will determine organization success. AchieveGlobal provides exceptional development in interpersonal business skills, giving companies the workforce they need for business results. Located in over 40 countries, we offer multi-language, learning-based solutions—globally, regionally, and locally.

We understand the competition you face. Your success depends on people who have the skills to handle the challenges beyond the reach of technology. We're experts in developing these skills, and it's these skills that turn your strategies into business success in the 21st century.

These are things technology can't do. Think. Learn. Solve problems. Listen. Motivate. Explain. People with these skills have a bright future in the 21st century. AchieveGlobal prepares you for that world.



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