



DETAILED RESULTS

PERCEPTIONS & INTEGRATION OF TECHNOLOGY WITHIN THE SALES PROCESS

CONDUCTED FOR
CANADIAN PROFESSIONAL
SALES ASSOCIATION

RESEARCH AND ANALYSIS FROM
CANADA'S LEADING PUBLIC AFFAIRS
AND MARKET RESEARCH EXPERTS

- *TECHNOLOGY IS LARGELY SEEN AS A POSITIVE FOR THE SALES PROCESS*
- *MANY HAVE EMBRACED & INTEGRATED CRM & SALES SOFTWARE*
- *SOFTWARE RECEIVES GLOWING REVIEWS FROM USERS*

METHODOLOGY

The survey was conducted with 300 sales professionals from June 5 to 29, 2021. A random sample of respondents were invited to complete the survey through a LinkedIn Sponsored InMail campaign. The margin of error for a comparable probability-based random sample of the same size is +/- 5.66%, 19 times out of 20. The data were weighted according to age, gender, company size and role. Totals may not add up to 100 due to rounding.

In addition to the survey, 20 in-depth interviews were conducted with sales professionals who had completed the online survey. The participants selected were diverse, as to achieve a sample that is reflective of the profession by gender, age, region, and industry.



EXECUTIVE SUMMARY

1. Sales professionals view new technology, such as artificial intelligence and sales pipeline software, positively in that it is more likely to be a positive than a negative contribution to the sales process. A majority have embraced technology and data analytics in the sales process.
2. Nevertheless, there are challenges. More than half think that technology is increasing the administrative burden and 54% expect AI and machine learning to disrupt the life of a salesperson.
3. Almost 6 in 10 say that their organization has a single-integrated sales process that all salespeople are supposed to follow.
4. 74% use CRM or sales pipeline software because it is mandated by the company. Feelings are generally positive about CRM/sales software with frustration (16%) being the main negative emotion.
5. Users of software are quite positive across the board, and it is certainly well used. Among those who have CRM software, 53% report that they “basically live in the software.”
6. While sales professionals generally believe that technology will continue to play a greater and greater role in the sales process, the in-depth interviews highlighted some concerns. We heard that the software does not really improve the sales process and is often part of data collection for its own sake.





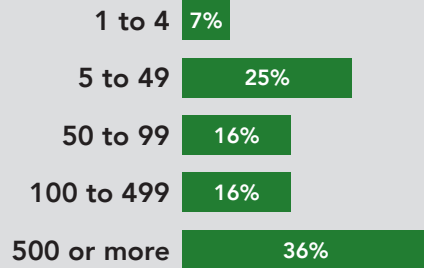
COMPANY PROFILE



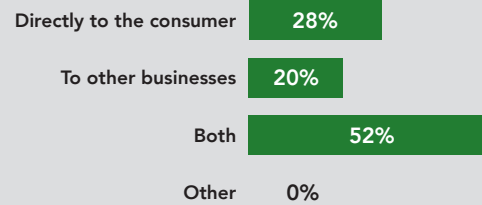
COMPANY PROFILE



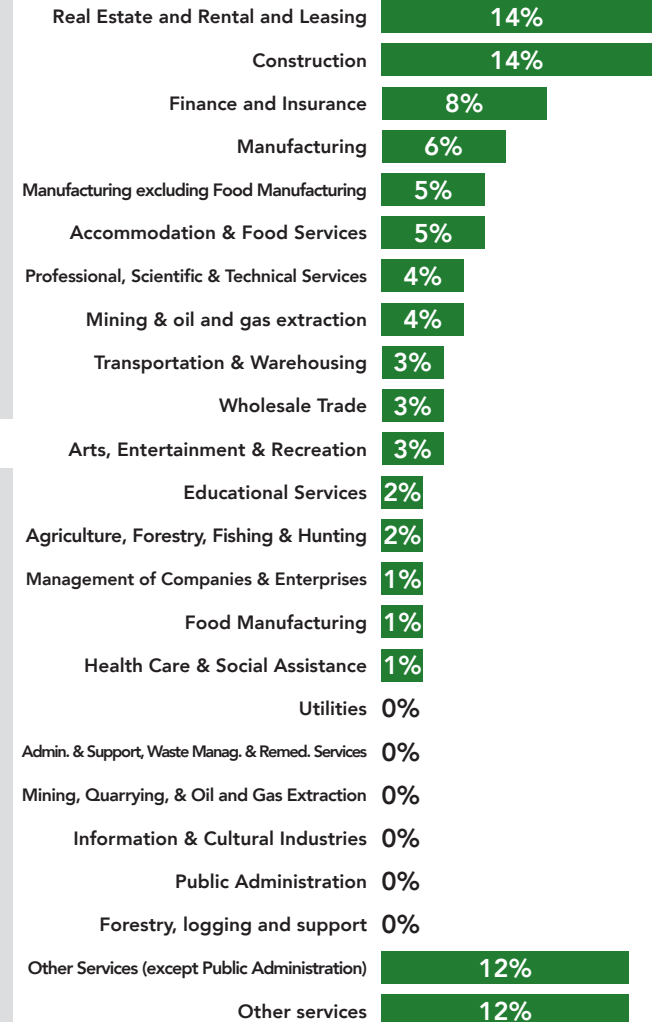
OF EMPLOYEES



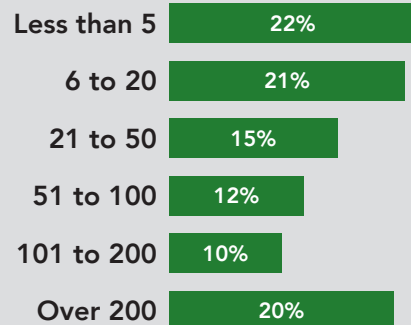
TYPE OF SALES



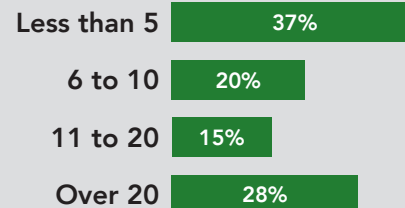
SECTOR



OF SALESPEOPLE



OF NON-FRONTLINE SALESPEOPLE





SALES PROCESS & ORIENTATION



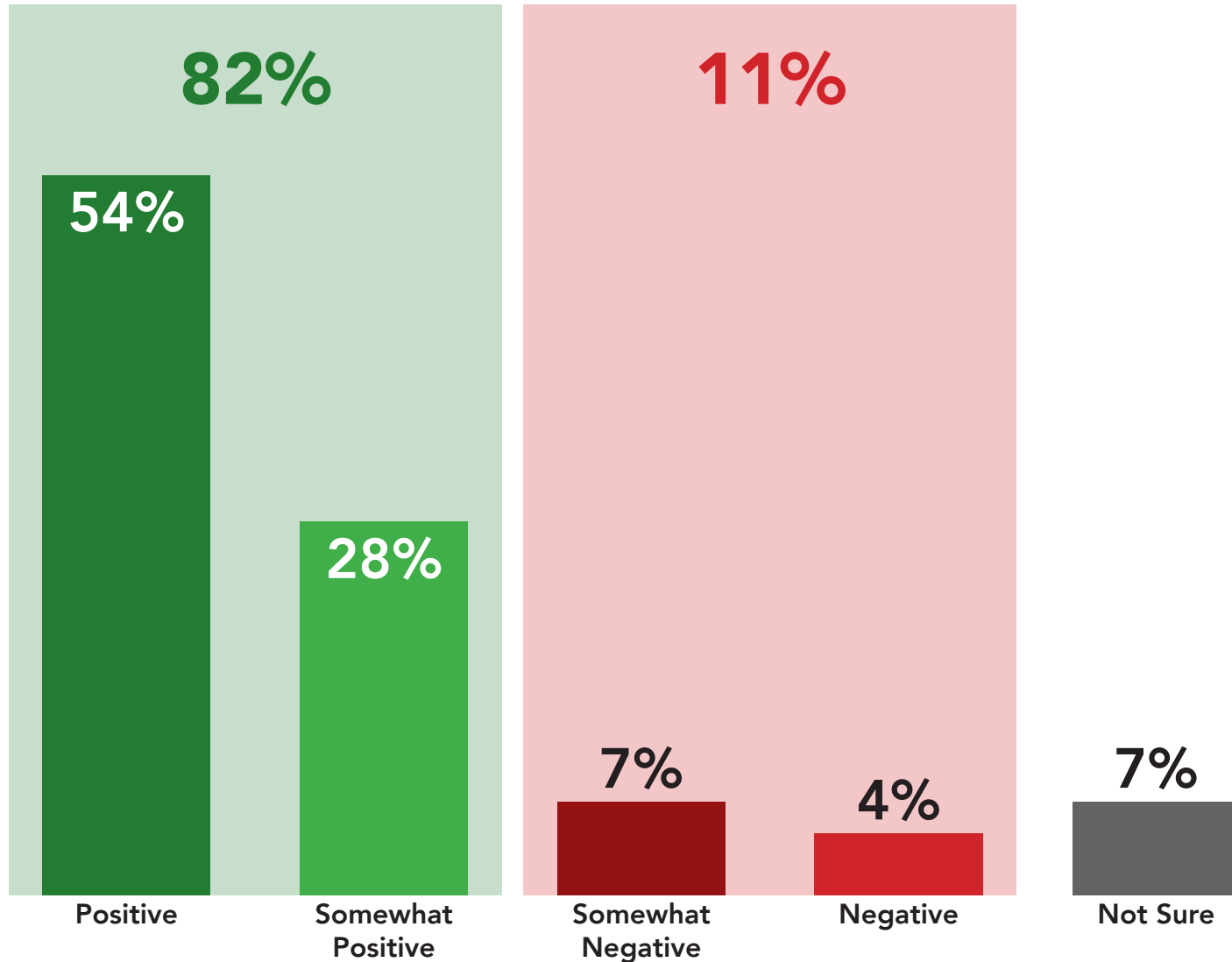
KEY FINDINGS

1. Most think that incorporating new technology is positive for the sales profession. Those 18-35 years of age hold less positive views on this, despite being more likely to have embraced technology.
2. Individuals & companies are more likely to have embraced the use of technology (i.e., sales software) in the sales process than to have embraced the use of data analytics (i.e., sales insights derived from data analysis) in the sales process.
 - Companies that sell only to other businesses are less likely to have embraced technology
 - Large companies are much more likely to have embraced data analytics
3. While a large percentage of individuals have embraced technology, there is some misalignment between salespeople and their companies: 15% of sales people work in a company that does not share their view about technology.
4. Nearly 9 in 10 agree that collection of information at all stages of the sales process can lead to better conversion of sales leads, and that the use of technology and data analytics makes the sales process more efficient and effective.
5. 55% think that technology is increasing the administrative burden for sales professionals and 54% expect AI and machine learning to disrupt the life of a salesperson.
 - Younger sales professionals are more likely to feel the administrative burden.



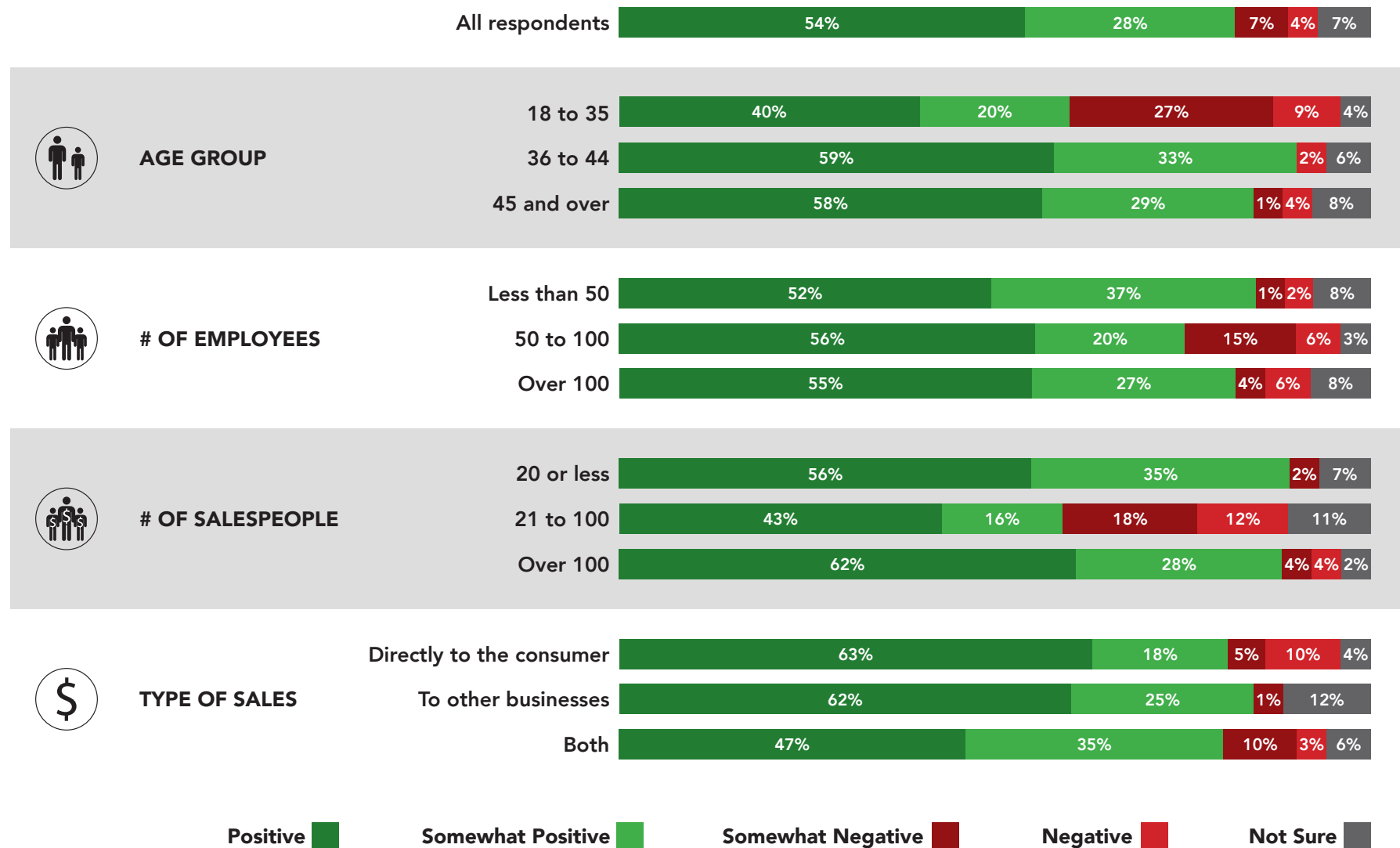
IMPACT OF THE USE OF NEW TECHNOLOGY AS PART OF THE SALES PROCESS

Many organizations are incorporating new technology, such as artificial intelligence and sales pipeline software as part of their sales process. Do you think the use of these tools is positive or negative for the sales profession?



IMPACT OF THE USE OF NEW TECHNOLOGY AS PART OF THE SALES PROCESS

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APPROACH TO THE SALES PROCESS

Which of the following best describes your personal approach to the sales process?

THE USE OF TECHNOLOGY

I have embraced the use of technology in the sales process

84%

16%

I have not embraced the use of technology in the sales process

My company has embraced the use of technology in the sales process

79%

21%

My company has not embraced the use of technology in the sales process

THE USE OF DATA ANALYTICS

I have embraced the use of data analytics in the sales process

69%

31%

I have not embraced the use of data analytics in the sales process

My company has embraced the use of data analytics in the sales process

74%

26%

My company has not embraced the use of data analytics in the sales process

APPROACH TO THE SALES PROCESS

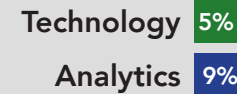
Which of the following best describes your personal approach to the sales process?



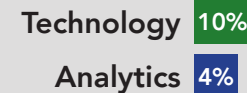
BOTH companies and individuals embrace



Companies embrace but NOT individuals



Individuals embrace but NOT companies



Misalignment between salesperson and company



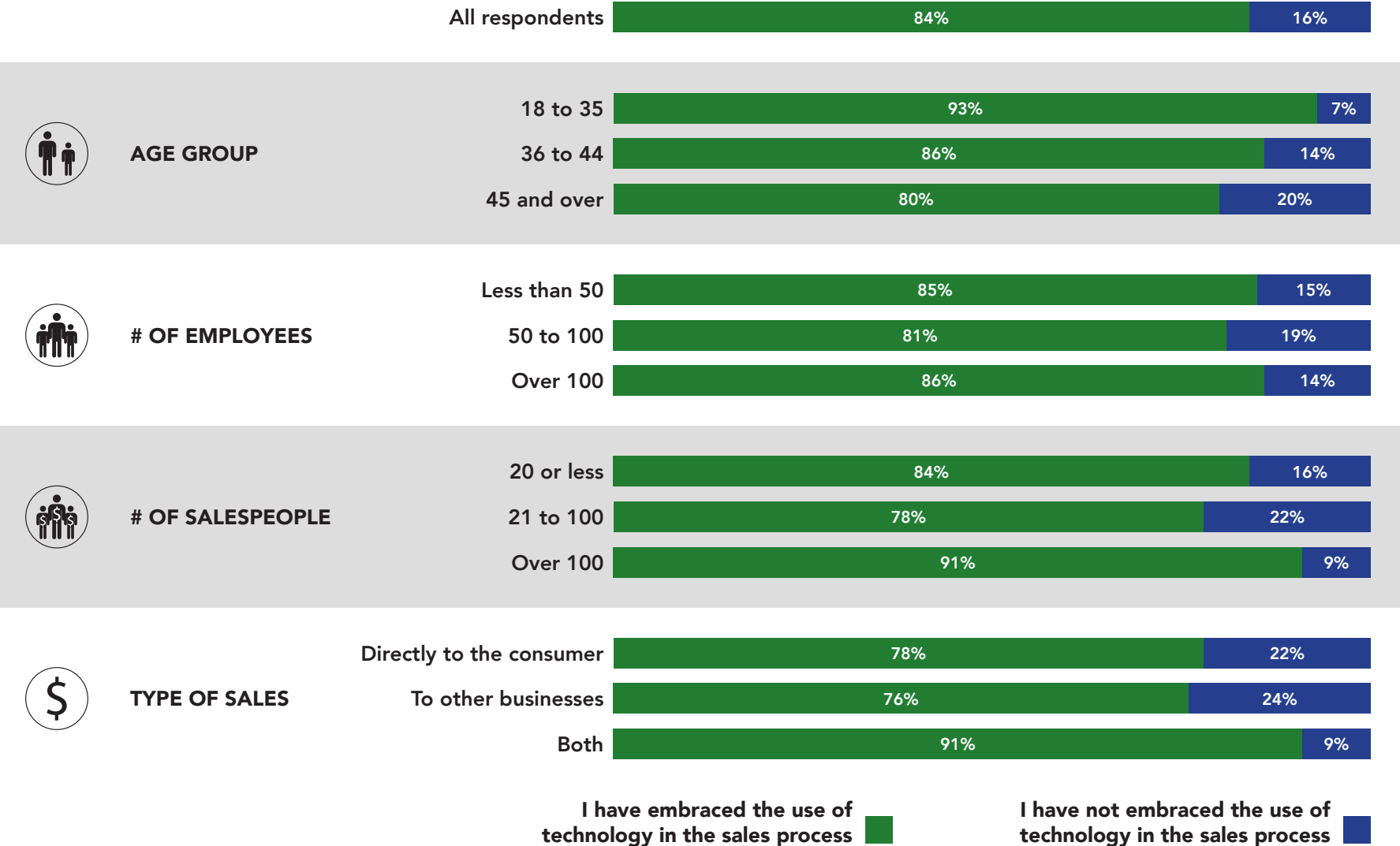
NEITHER companies nor individuals embrace



PERSONAL APPROACH TO THE SALES PROCESS

I HAVE / HAVE NOT EMBRACED THE USE OF TECHNOLOGY IN THE SALES PROCESS

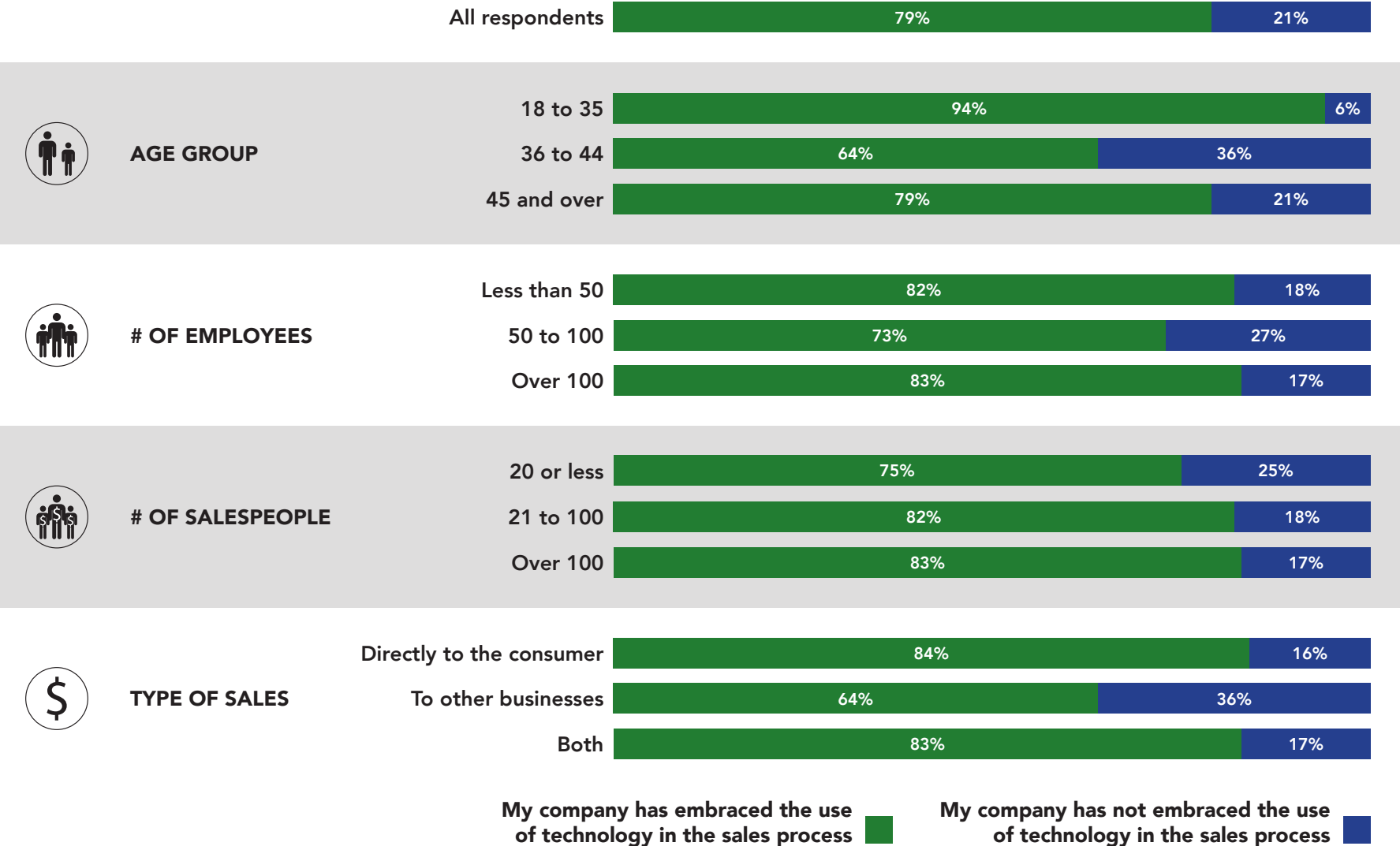
Which of the following best describes your personal approach to the sales process?



COMPANY APPROACH TO THE SALES PROCESS

MY COMPANY HAS / HAS NOT EMBRACED THE USE OF TECHNOLOGY IN THE SALES PROCESS

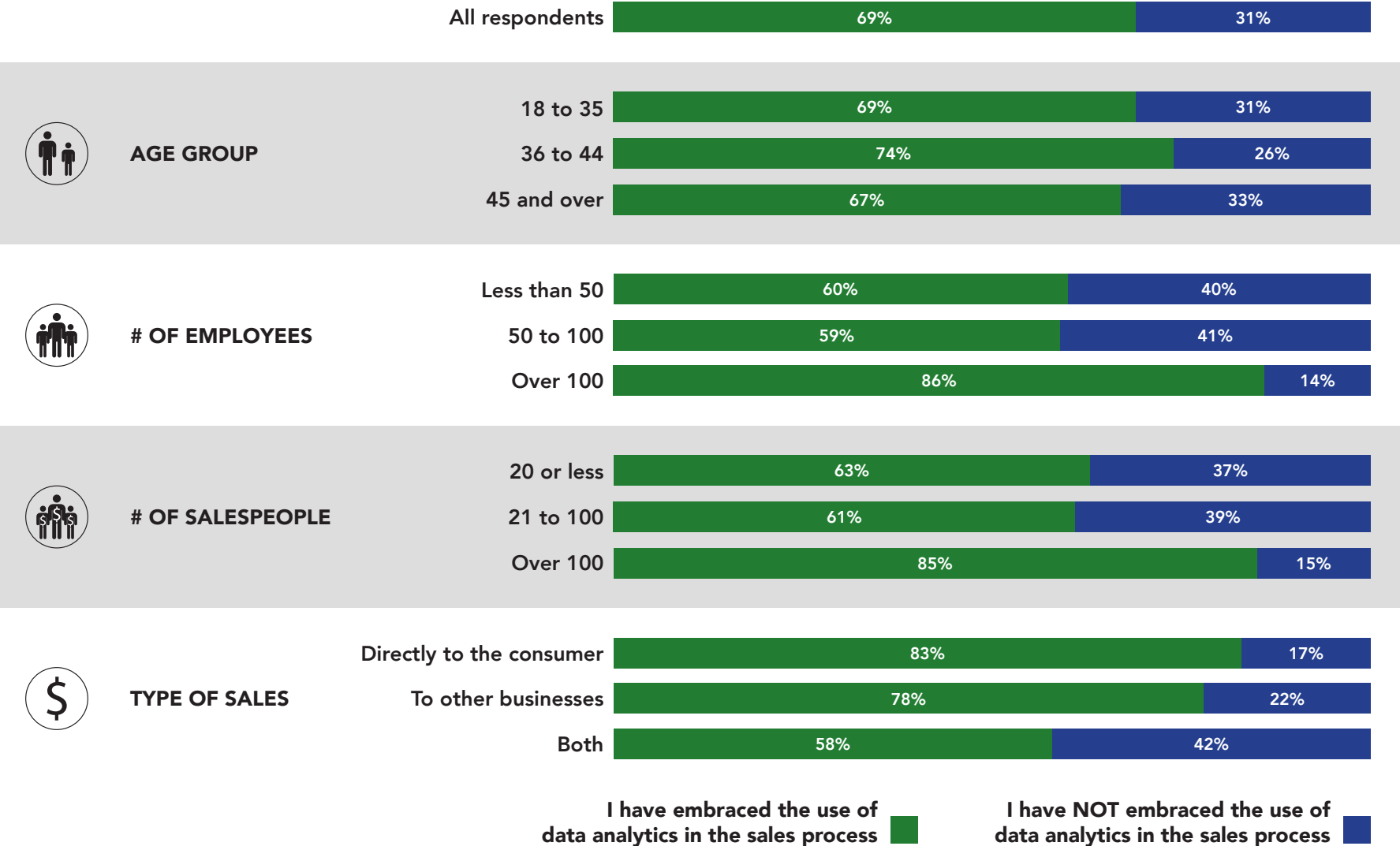
Which of the following best describes your personal approach to the sales process?



PERSONAL APPROACH TO THE SALES PROCESS

I HAVE / HAVE NOT EMBRACED THE USE OF DATA ANALYTICS IN THE SALES PROCESS

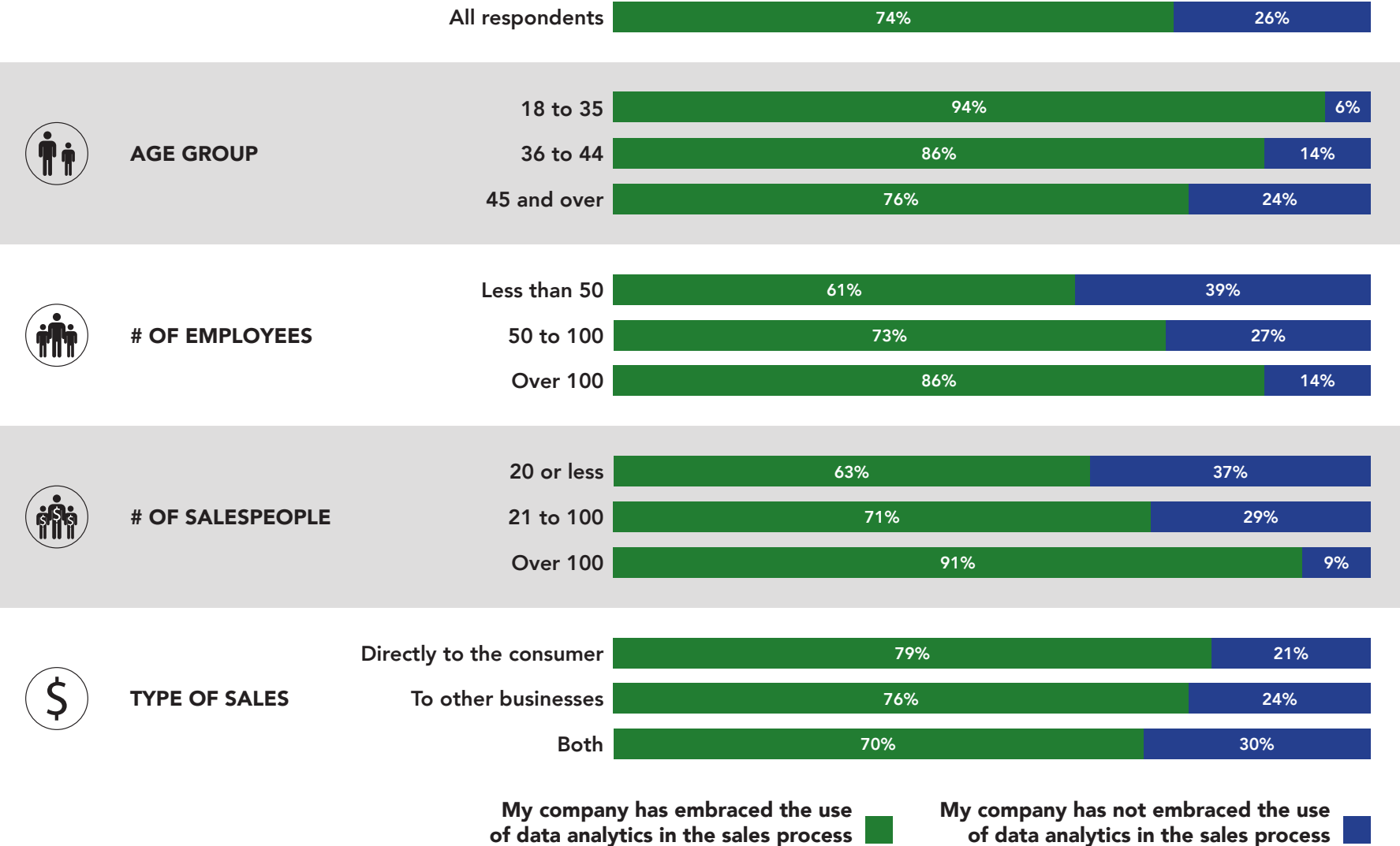
Which of the following best describes your personal approach to the sales process?



COMPANY APPROACH TO THE SALES PROCESS

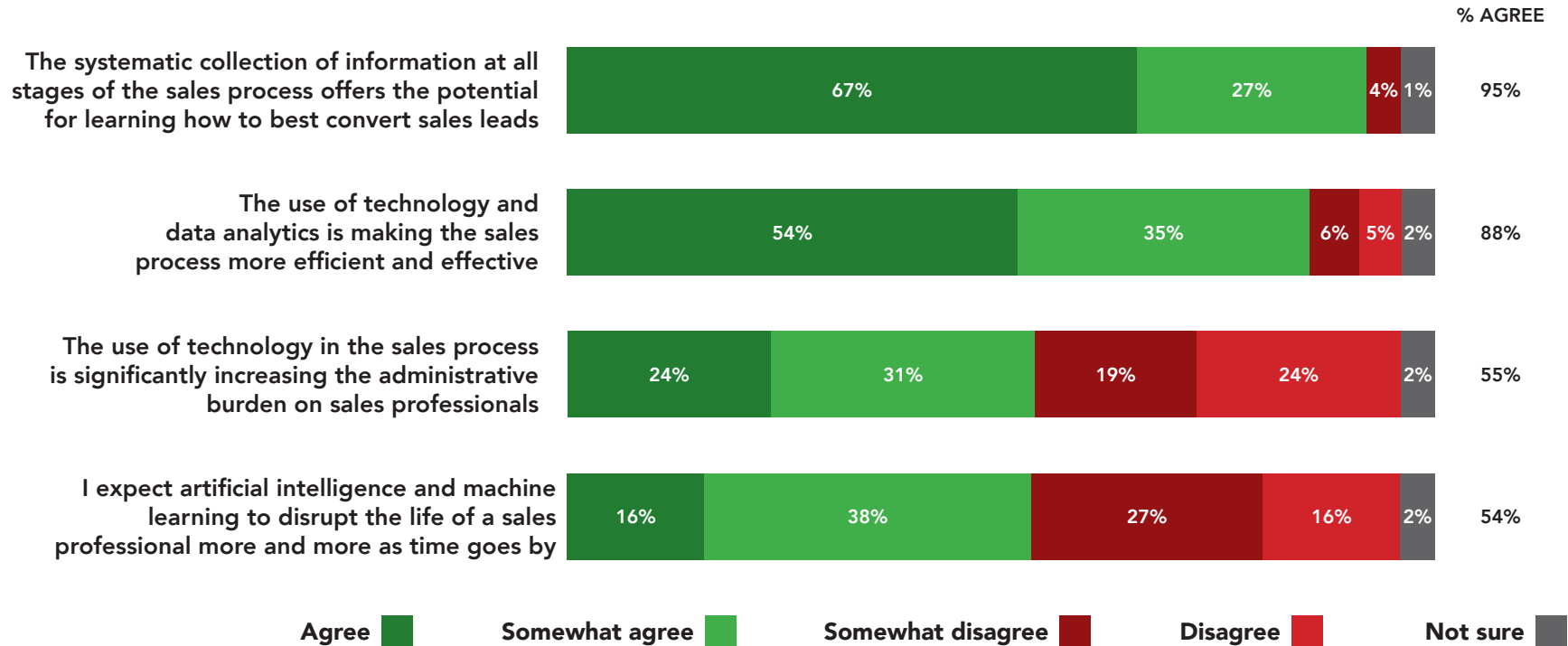
MY COMPANY HAS / HAS NOT EMBRACED THE USE OF DATA ANALYTICS IN THE SALES PROCESS

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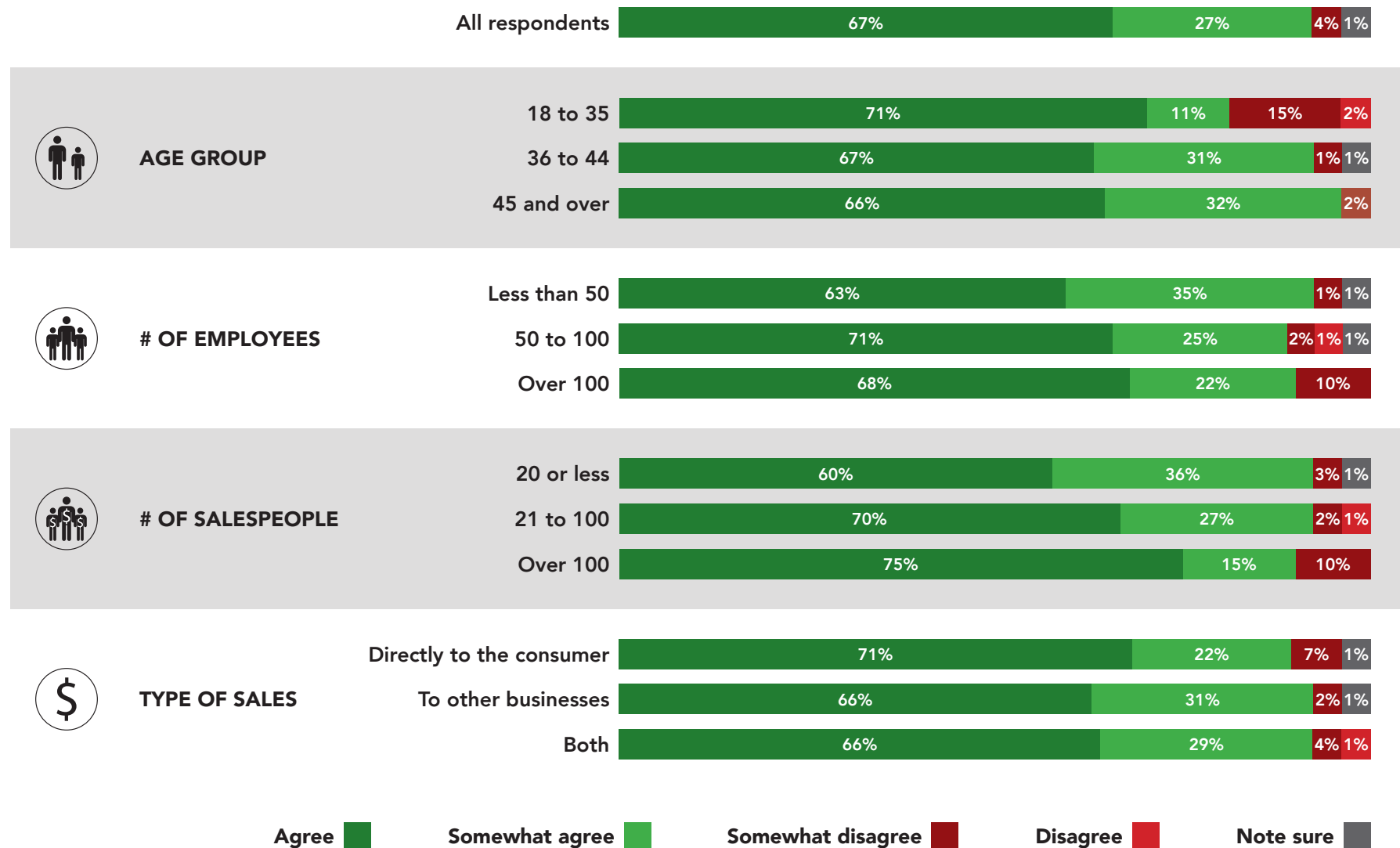
AGREE/DISAGREE STATEMENTS

Do you agree or disagree with each of the following?



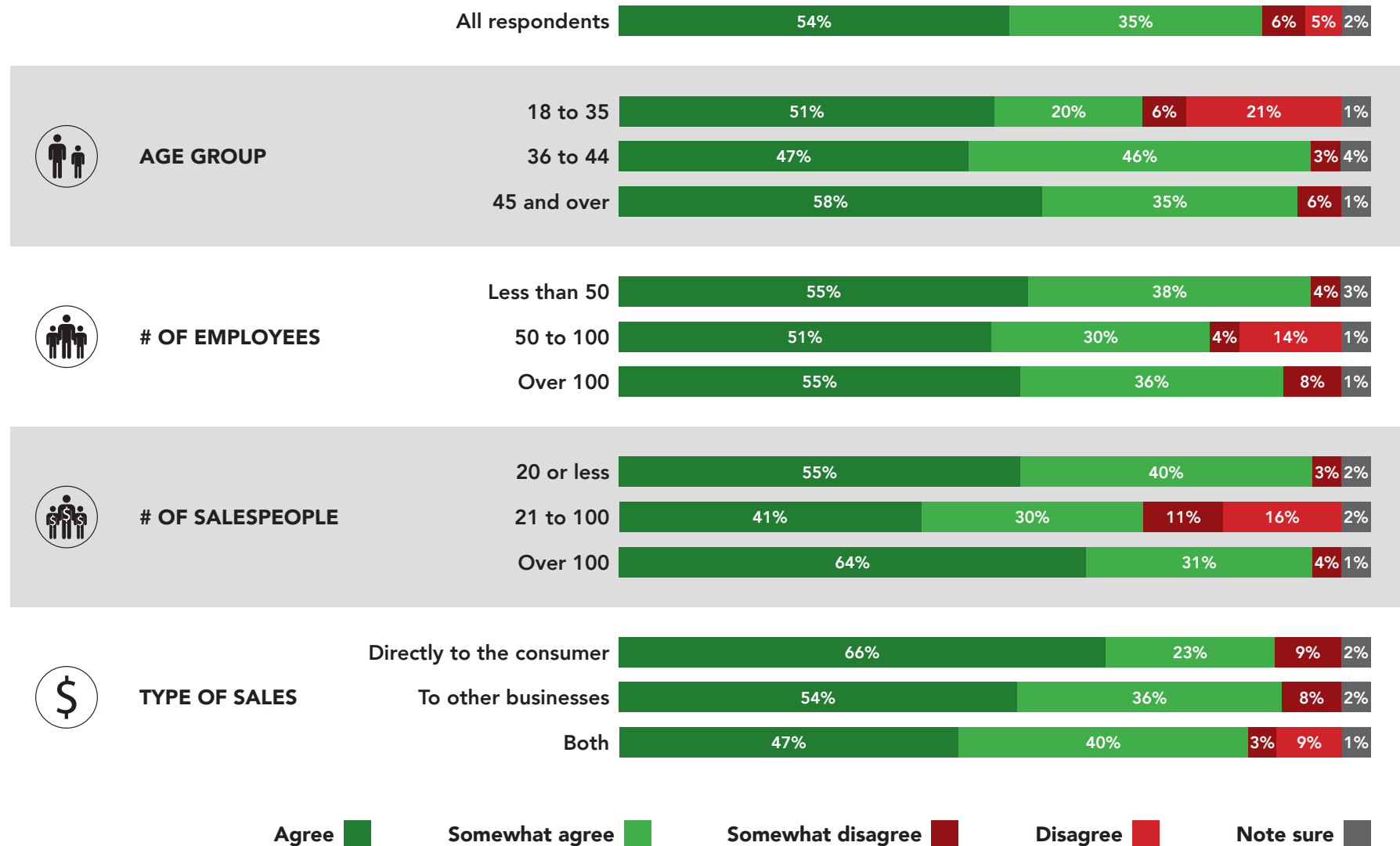
THE SYSTEMATIC COLLECTION OF INFORMATION AT ALL STAGES OF THE SALES PROCESS OFFERS THE POTENTIAL FOR LEARNING HOW TO BEST CONVERT SALES LEADS

Do you agree or disagree with each of the following?



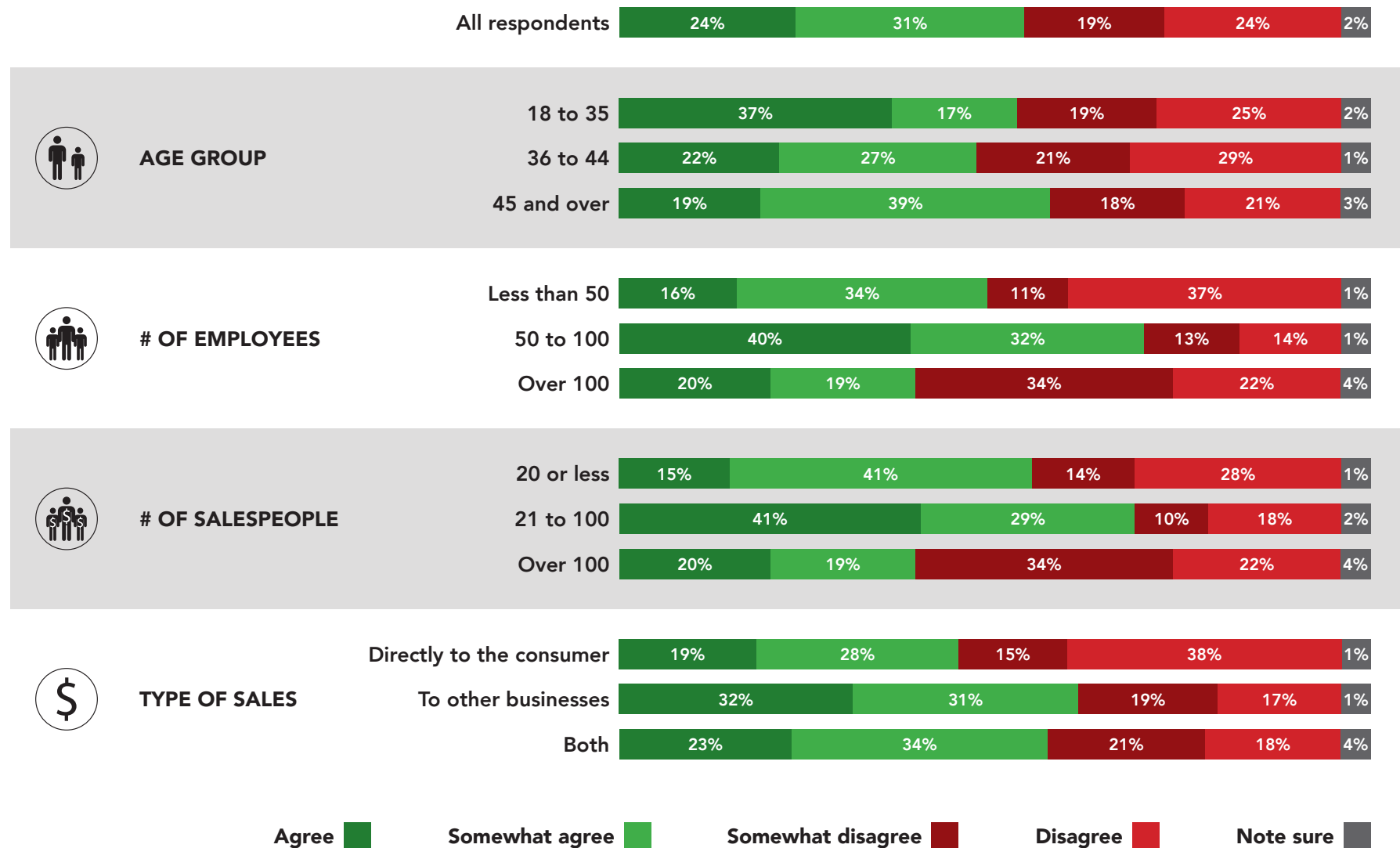
THE USE OF TECHNOLOGY AND DATA ANALYTICS IS MAKING THE SALES PROCESS MORE EFFICIENT AND EFFECTIVE

Do you agree or disagree with each of the following?



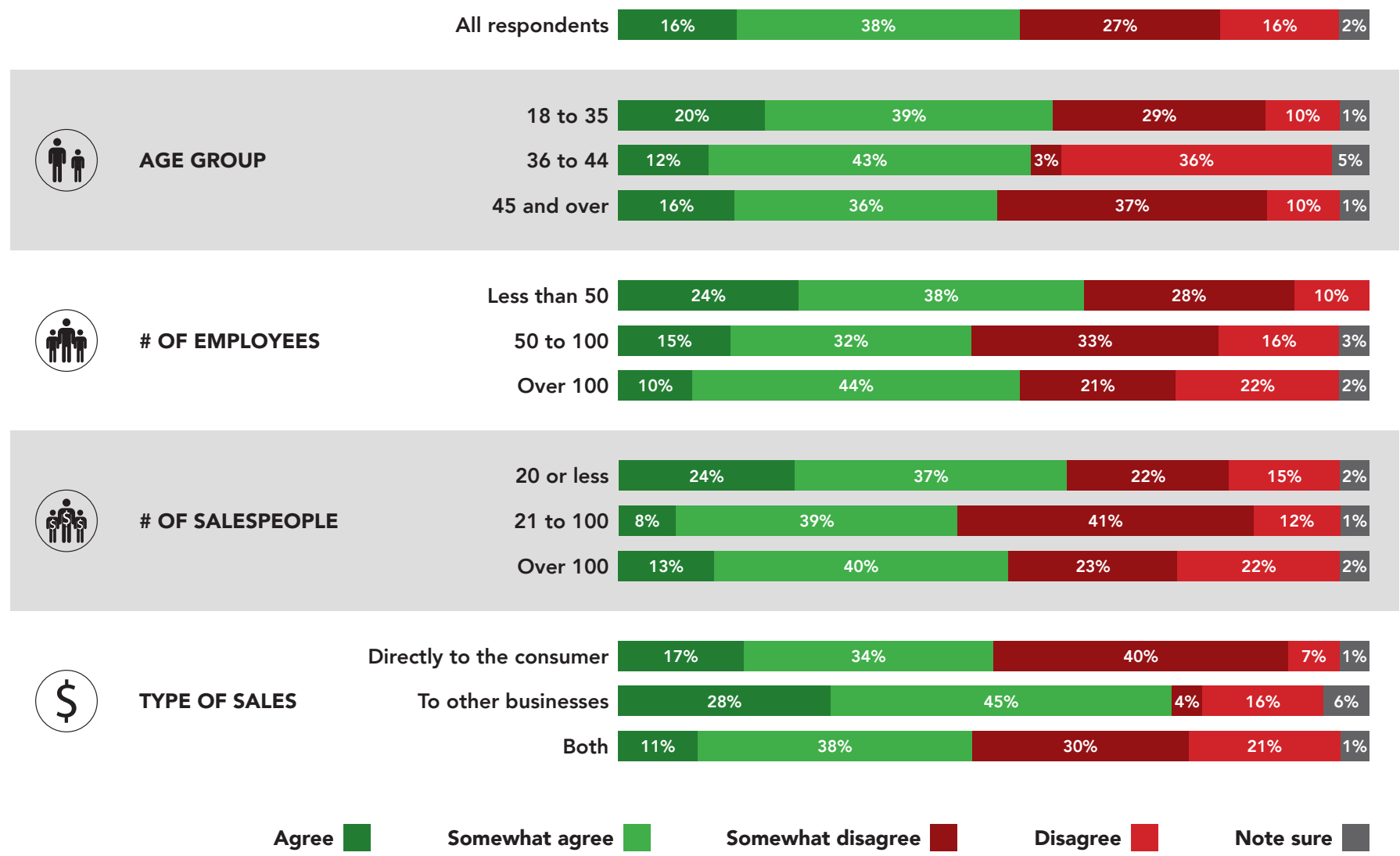
THE USE OF TECHNOLOGY IN THE SALES PROCESS IS SIGNIFICANTLY INCREASING THE ADMINISTRATIVE BURDEN ON SALES PROFESSIONALS

Do you agree or disagree with each of the following?



I EXPECT ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING TO DISRUPT THE LIFE OF A SALES PROFESSIONAL MORE AND MORE AS TIME GOES BY

Do you agree or disagree with each of the following?



KEY FINDINGS

6. 3 in 4 say their organization generates insights from sales data – this is more common among bigger companies with more employees & salespeople, and those that sell to other businesses.
7. Of those whose company does generate insights from sales data, nearly all say the insights are useful to their sales success. These insights are even more important to smaller companies, and to people who presumably have more experience working in their field (45 and over).
8. 59% of salespeople work at companies that have a single integrated sales process that is supposed to be followed. Salespeople in B2C sales are more likely to work for a company with this process.
9. Overall, there are positive feeling associated with the use of CRM or sales pipeline software, though 16% express frustration.
10. 2 in 3 say their organization uses CRM or sale pipelines software to assist them in the sales process. This is more popular among larger companies (more employees & salespeople) and the organizations that sell to other businesses.
11. Among those who say they don't use CRM or sales pipeline software, their reasoning includes that it's just too complicated or time consuming, or it's not yet supported by their company.
12. And 4 in 10 say if it were up to them, they would want to use CRM or sales pipeline software – though half aren't sure.



DOES YOUR ORGANIZATION...

Does your organization do any of the following?

Generate insights from sales data, trends and metrics and provide that information to the sales team

Have a single-integrated sales process that all sales people are supposed to follow

YES

NO

77%

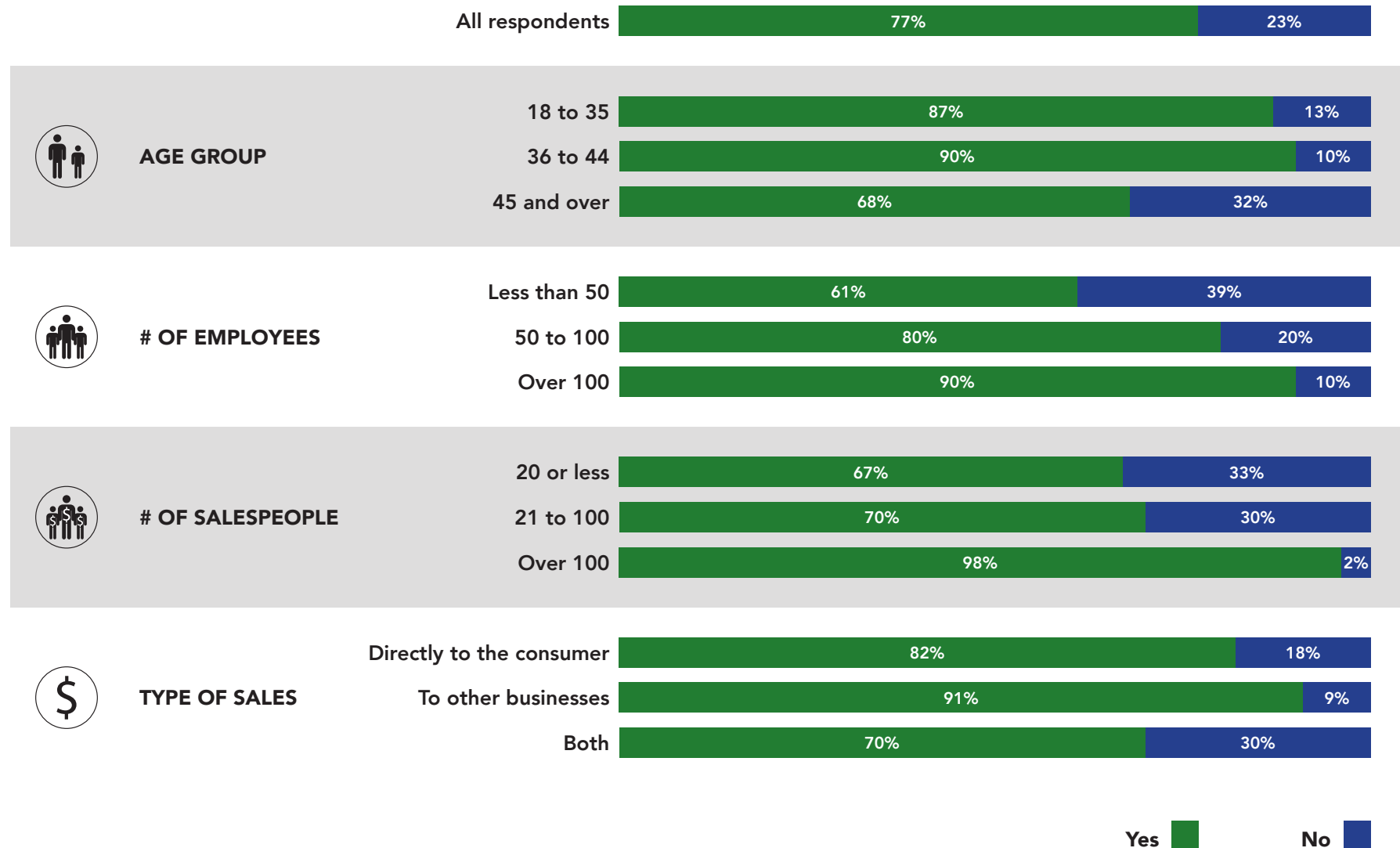
23%

59%

41%

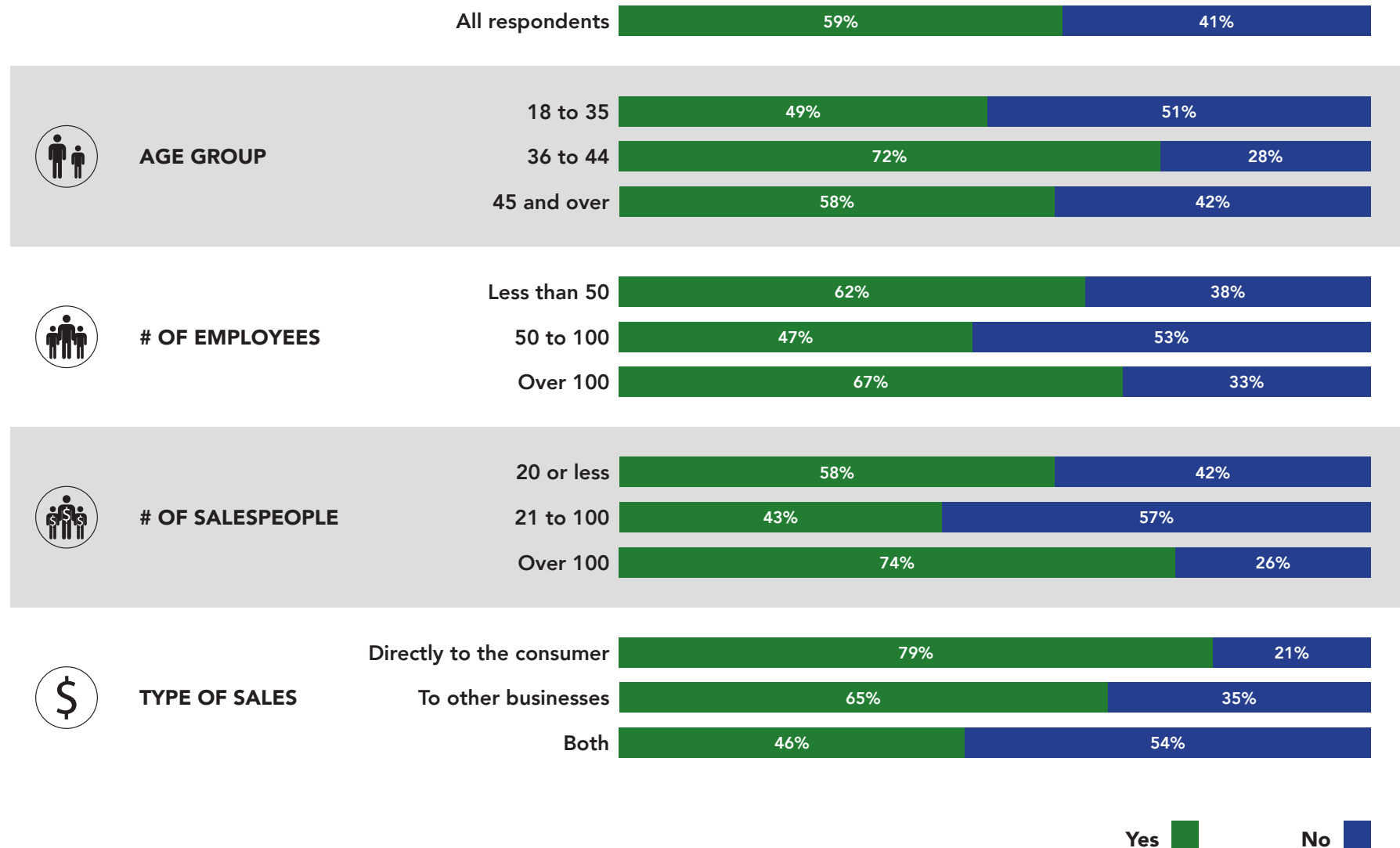
DOES YOUR ORGANIZATION...GENERATE INSIGHTS FROM SALES DATA, TRENDS AND METRICS AND PROVIDE THAT INFORMATION TO THE SALES TEAM?

Does your organization do any of the following?



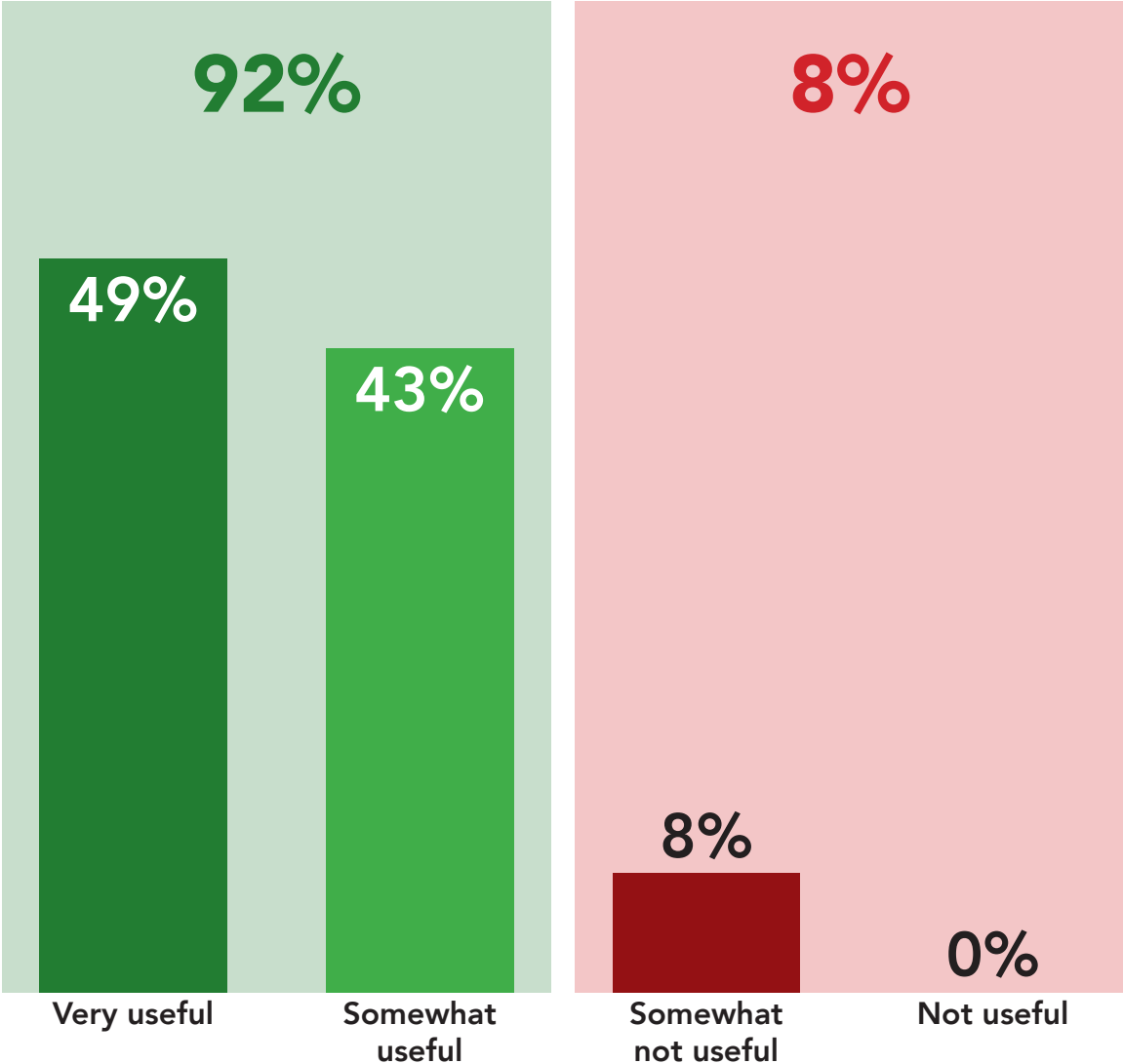
DOES YOUR ORGANIZATION...HAVE A SINGLE-INTEGRATED SALES PROCESS THAT ALL SALESPEOPLE ARE SUPPOSED TO FOLLOW?

Does your organization do any of the following?



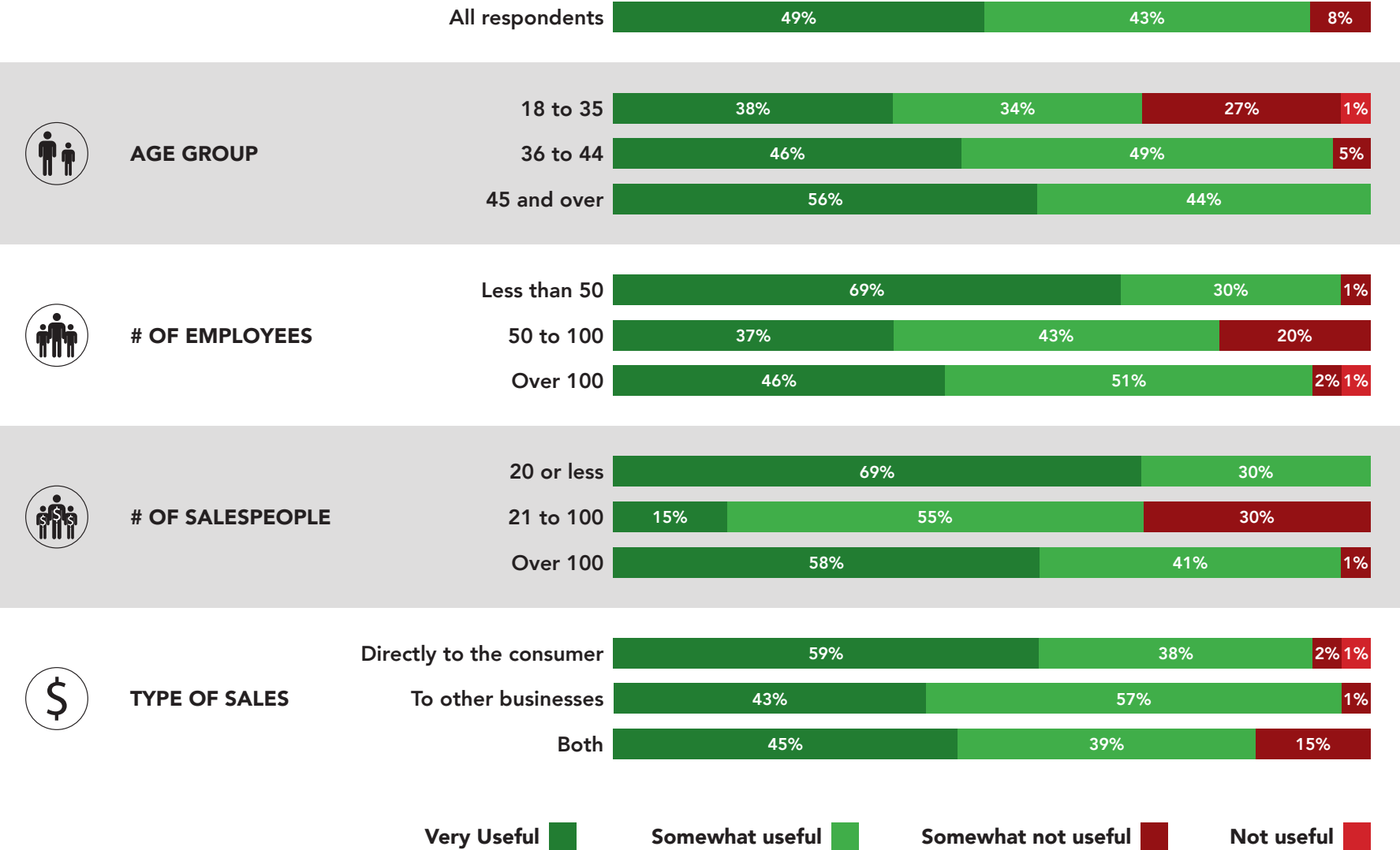
USEFULNESS OF INSIGHTS FROM SALES DATA

How useful are these insights for improving your sales success?
[Those that generate insights from sales data]



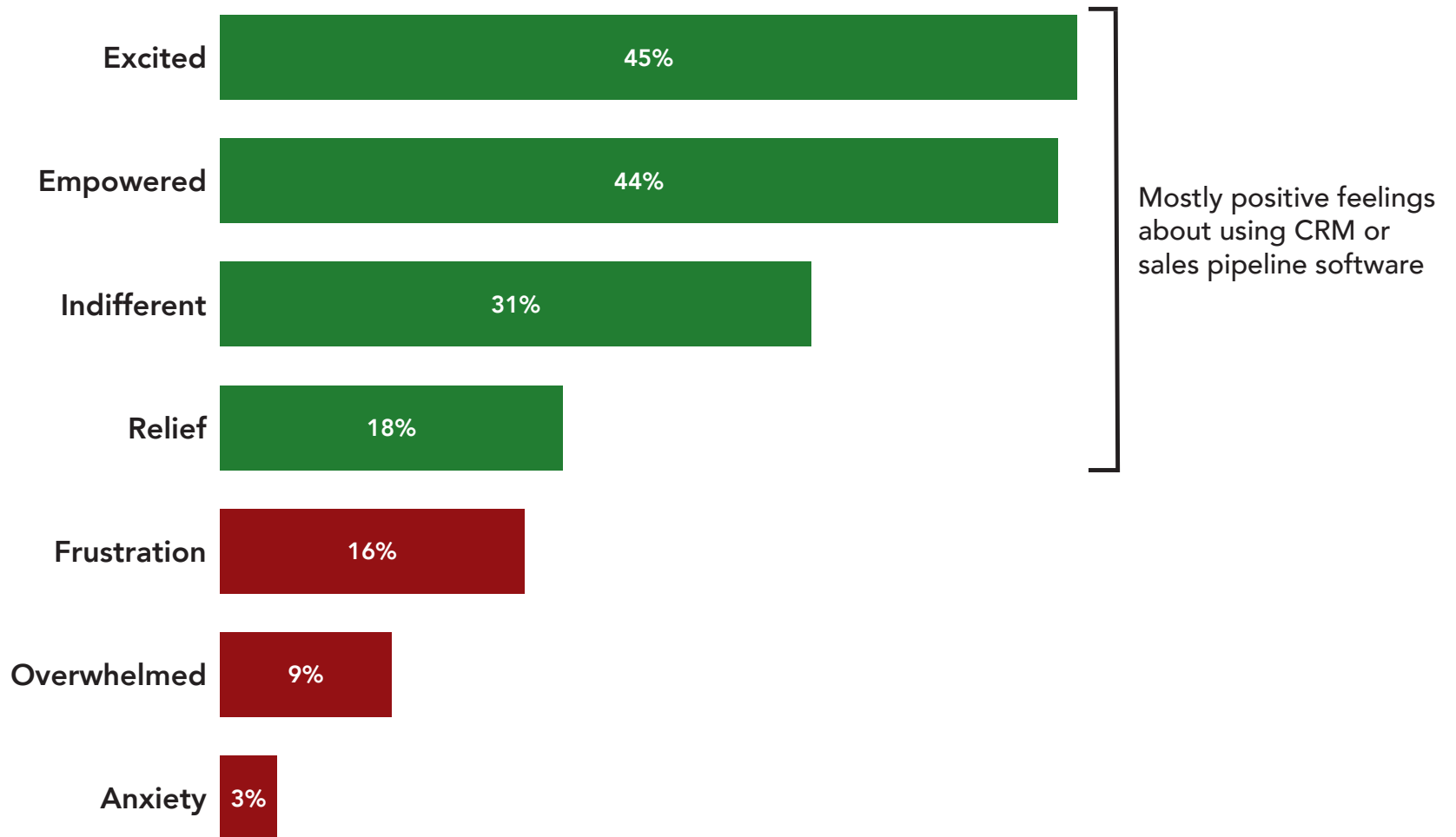
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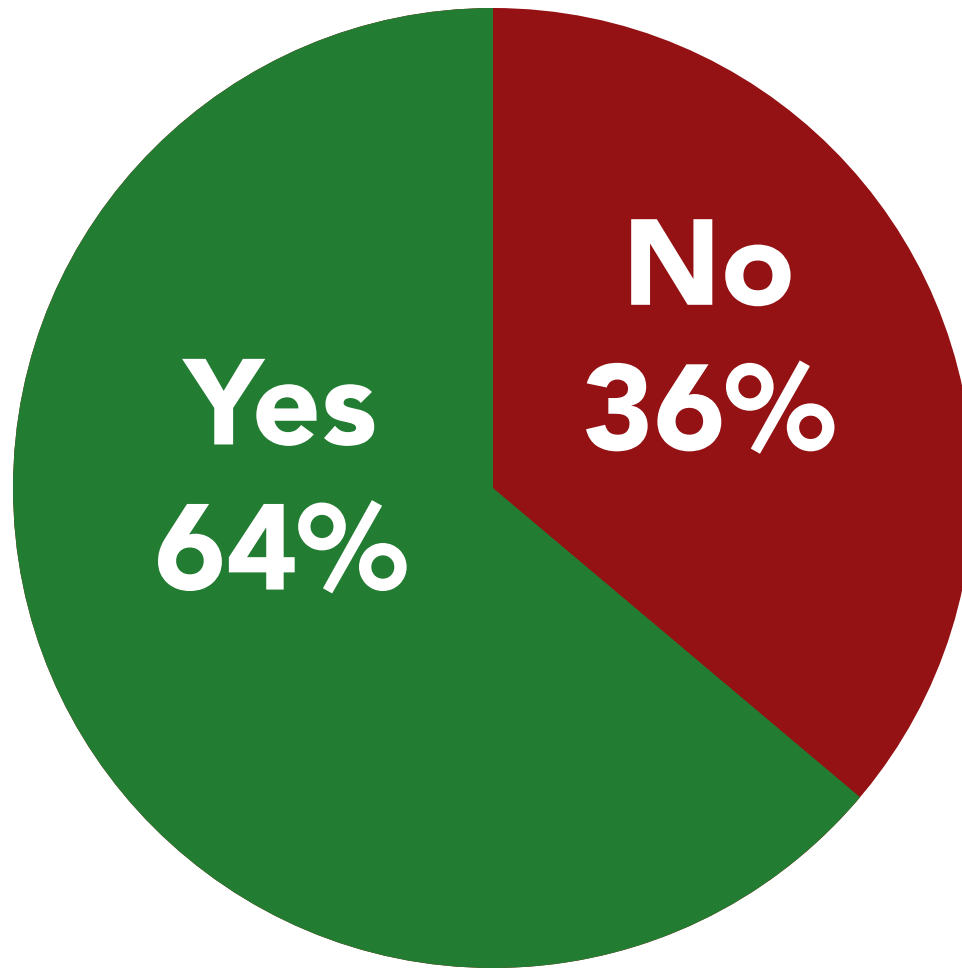
FEELINGS ASSOCIATED WITH USING SALES PIPELINE SOFTWARE

Which of the following words best describes your feelings about using CRM or sales pipeline software such as Salesforce, Microsoft Dynamics, HubSpot or other like programs?



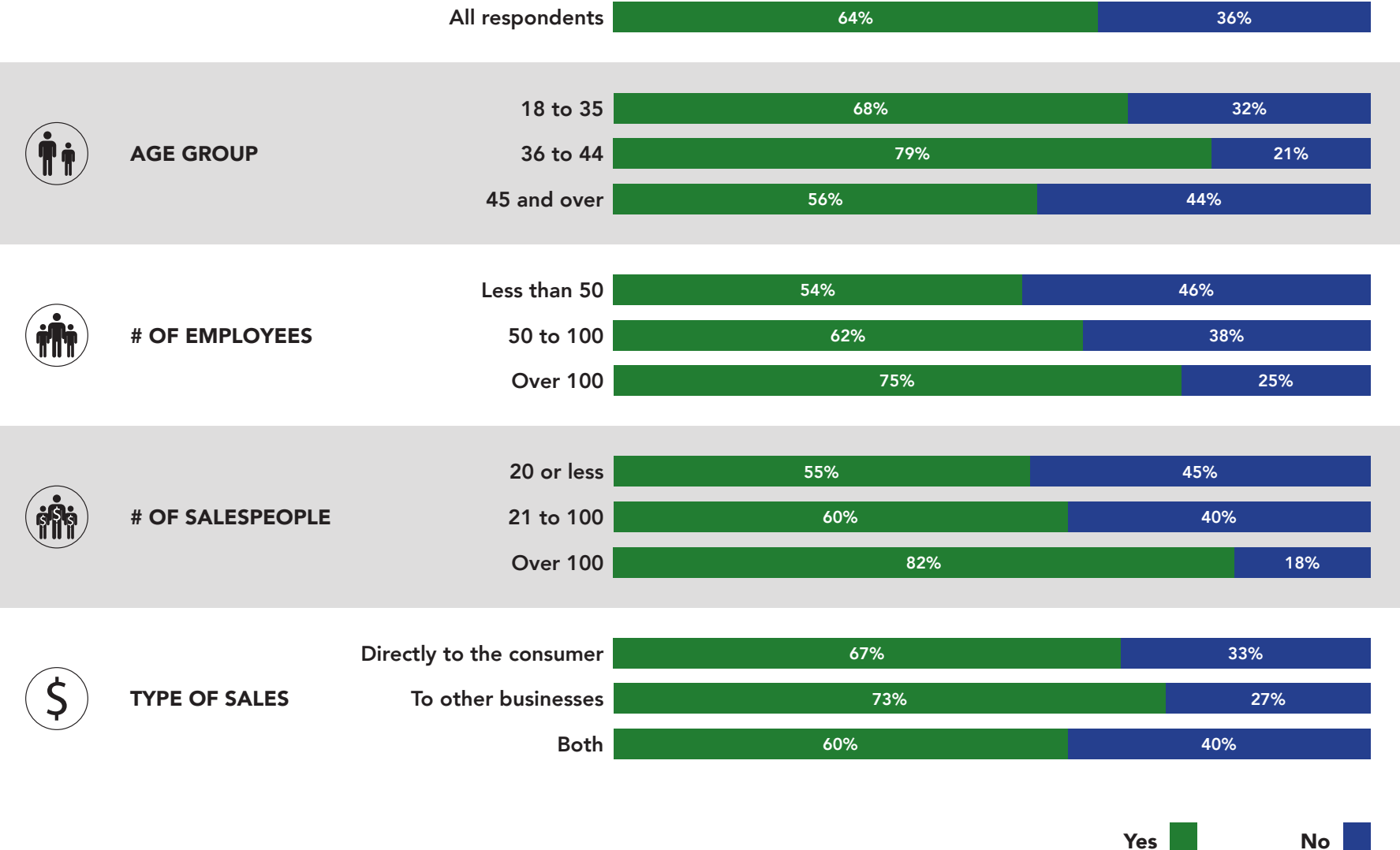
USAGE OF SALES PIPELINE SOFTWARE TO ASSIST SALES PROCESS

Does your organization use CRM or sales pipeline software such as Salesforce, Microsoft Dynamics, HubSpot or other similar CRM or sales pipeline tools, to assist you in the sales process?



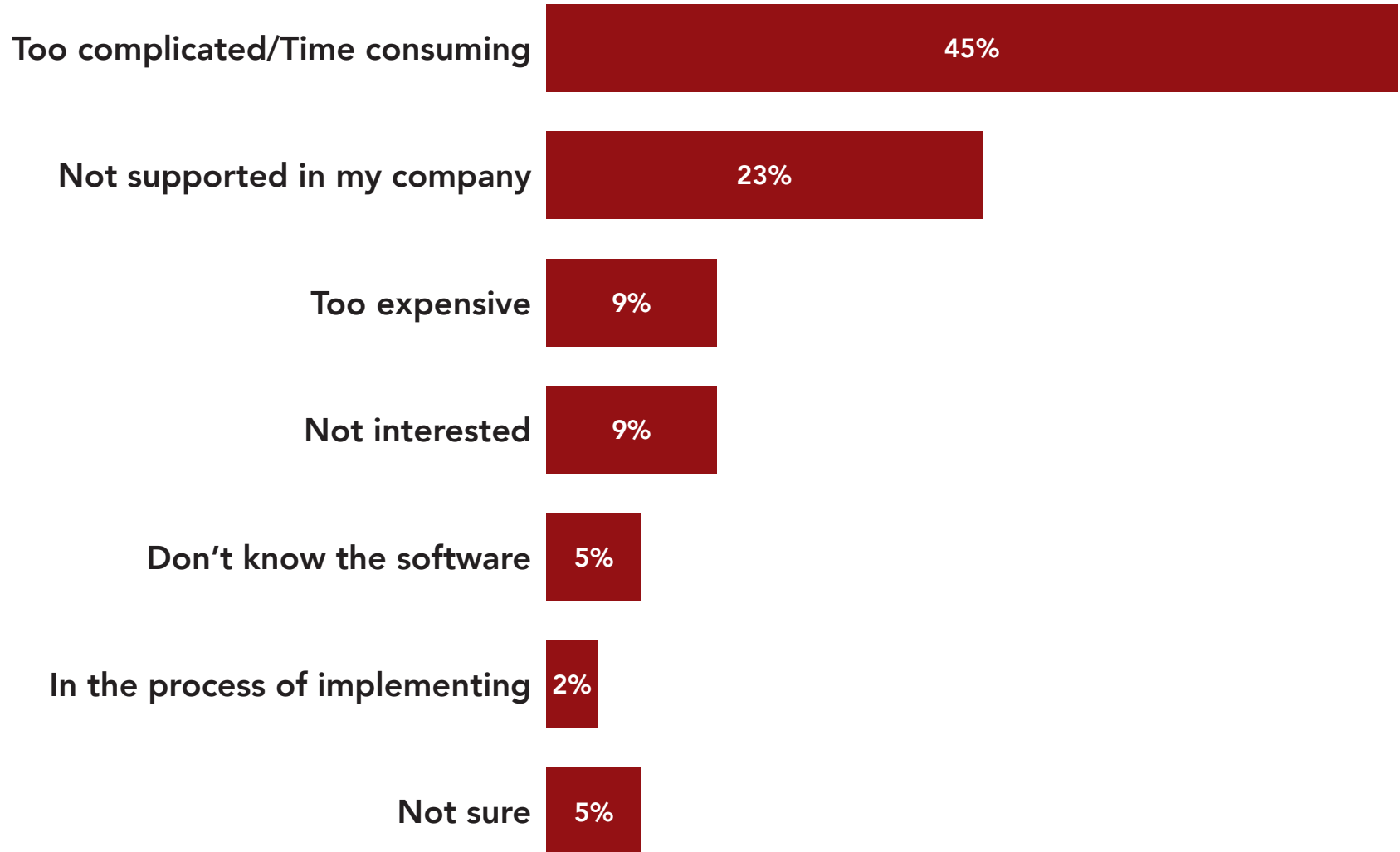
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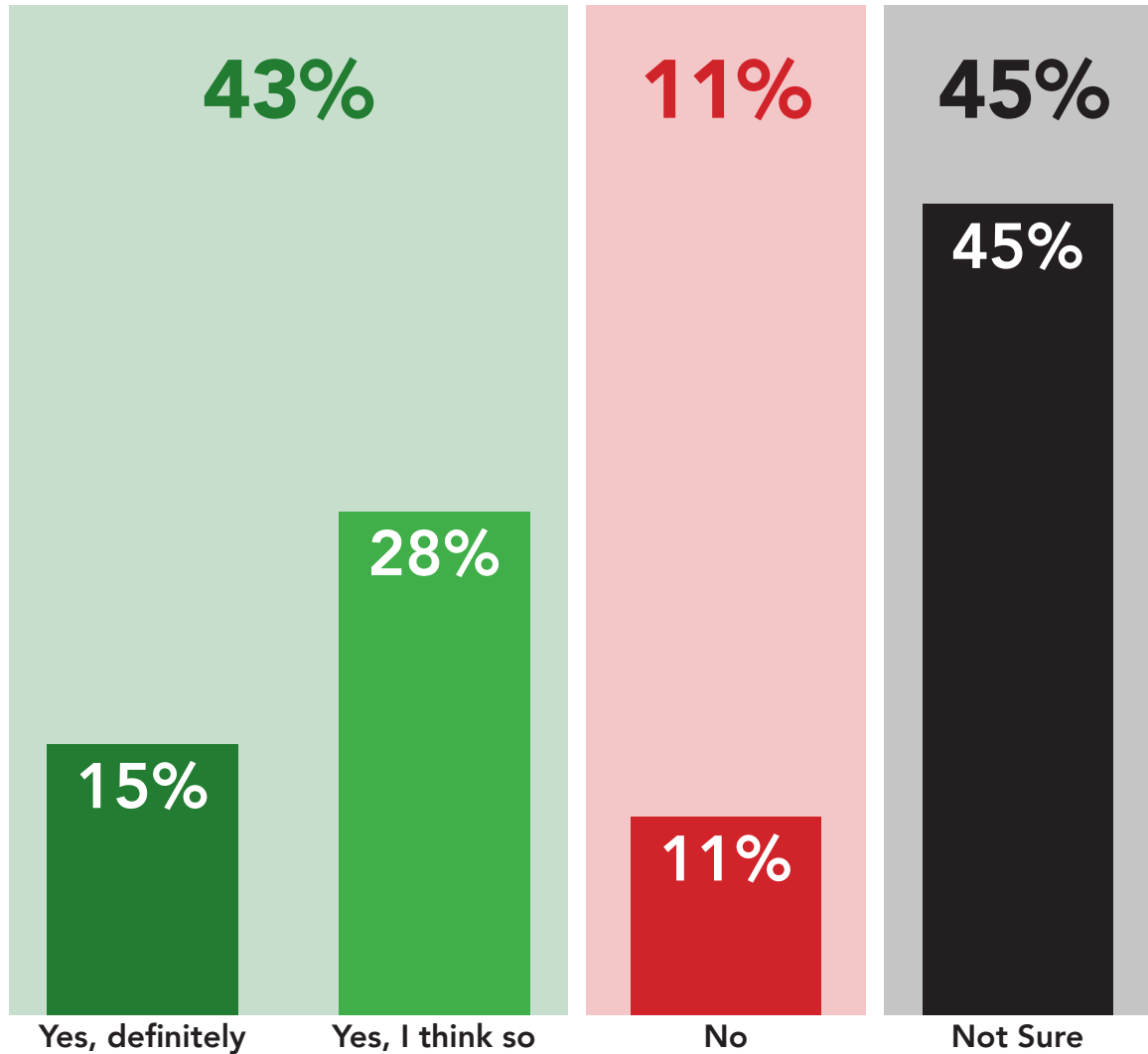
REASONS DON'T USE PIPELINE SOFTWARE


What are the main reasons that you don't use CRM or sales pipeline tools to facilitate the sales process?
[Those that don't use CRM or sales pipeline software]



4 IN 10 WOULD USE SALES PIPELINE SOFTWARE IF IT WERE UP TO THEM – BUT HALF AREN'T SURE

If it was up to you, would you want to use a CRM or sales pipeline tools?
[Those that don't use CRM or sales pipeline software]



A blurred photograph of a modern office hallway with glass walls and doors. People are seen in motion, creating a sense of activity and movement. The lighting is bright, and the overall atmosphere is professional and dynamic.

CRM & PIPELINE SOFTWARE USERS N=204

KEY FINDINGS

1. Among those that say their company uses CRM or sales pipeline software, 74% say they use it because it's mandated by the company – this is much more likely among larger companies with more employees & salespeople.
2. Half of users say that they “basically live in the software” because it is essentially embedded in their workflow. And another 39% say they use it as required. Nearly no users try to limit their use of the software.
 - Those over 35 are nearly twice as likely to say that their use of the software is embedded in their workflow than those under 35.
3. The most common uses for CRM or sales pipeline software are for maintaining a record of all company contacts with prospects & current clients, monitoring lead conversion, and, eventually, capturing leads.
4. 8 in 10 say they use the software for generating insights to improve the sales process, projecting revenue, and monitoring sales targets and conversion rates.



3 IN 4 SAY USE OF SALES PIPELINE TOOLS IS MANDATED BY THE COMPANY

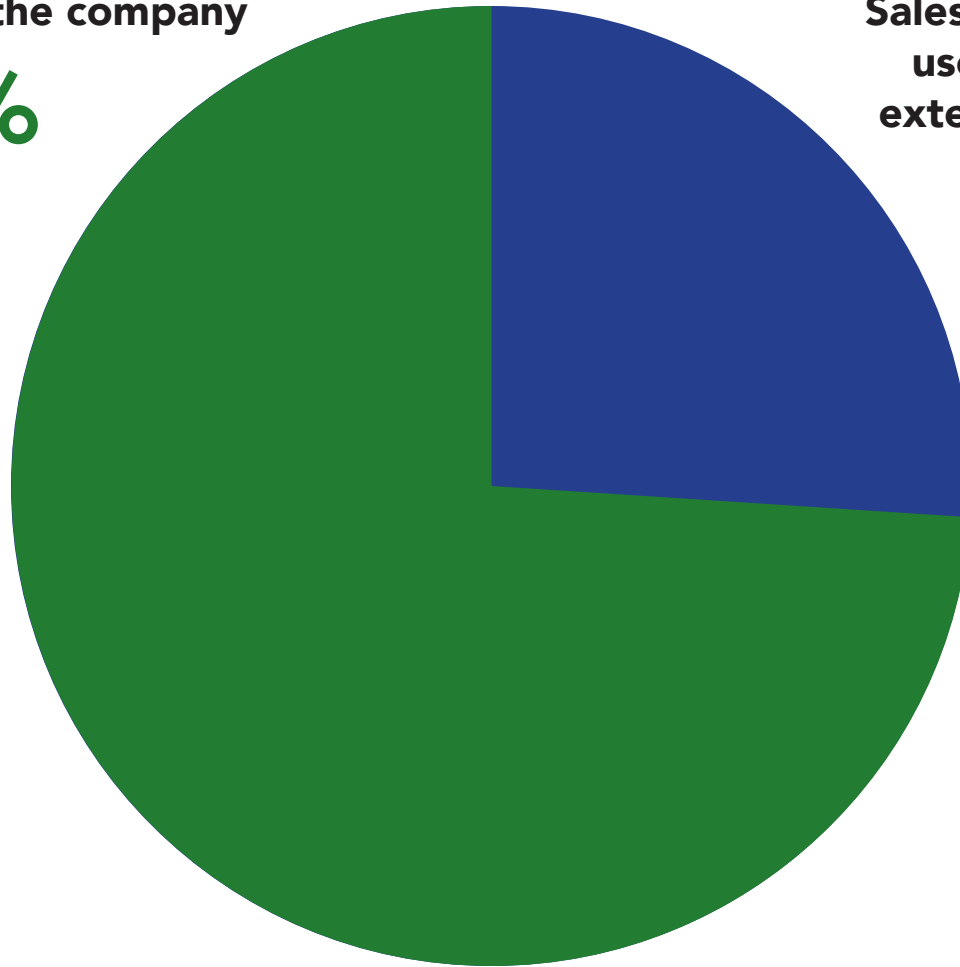
Is the use of CRM or sales pipeline tools mandated by the company or are you free to use or not use the software?

It is mandated by the company

74%

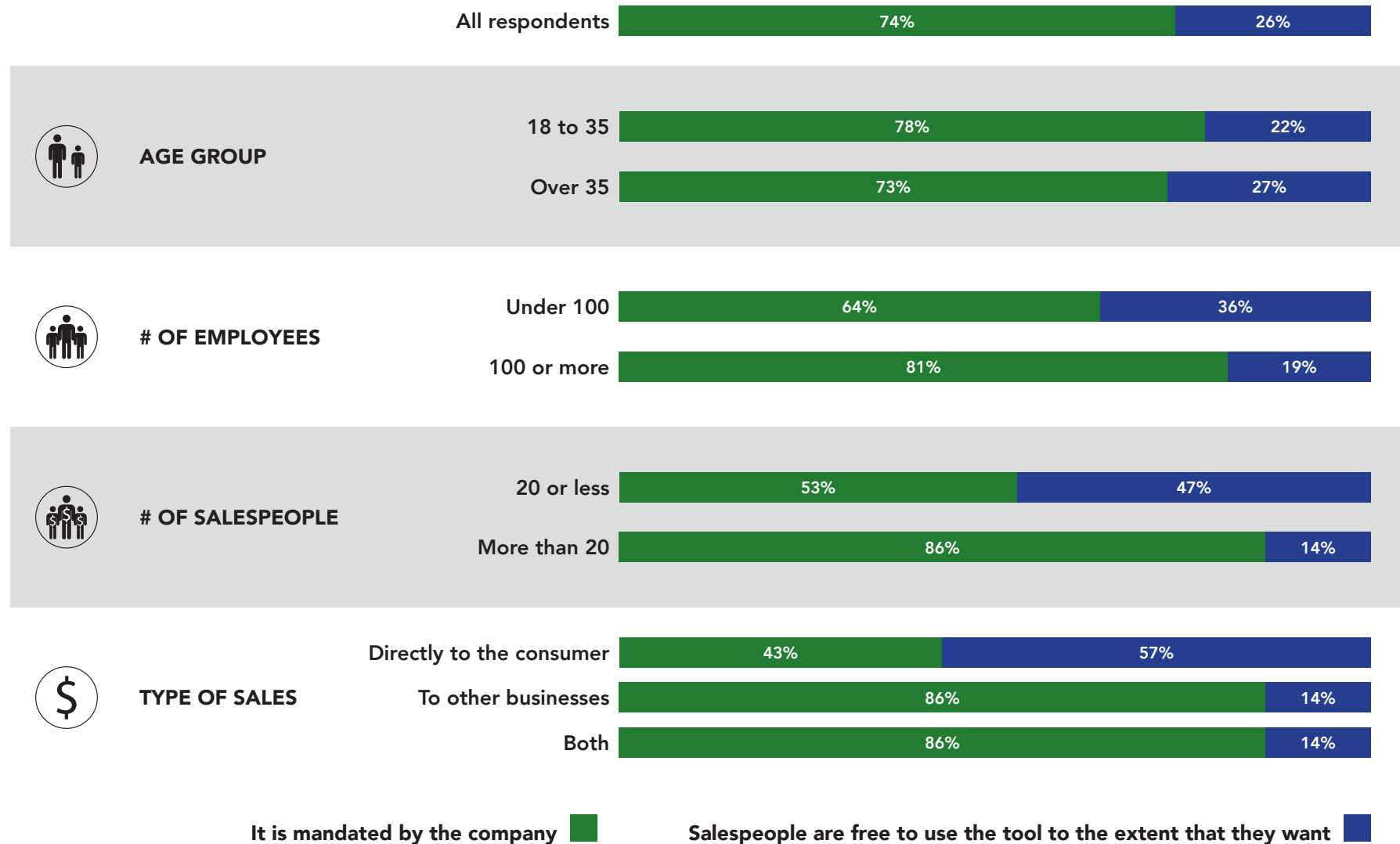
Salespeople are free to use the tool to the extent that they want

26%



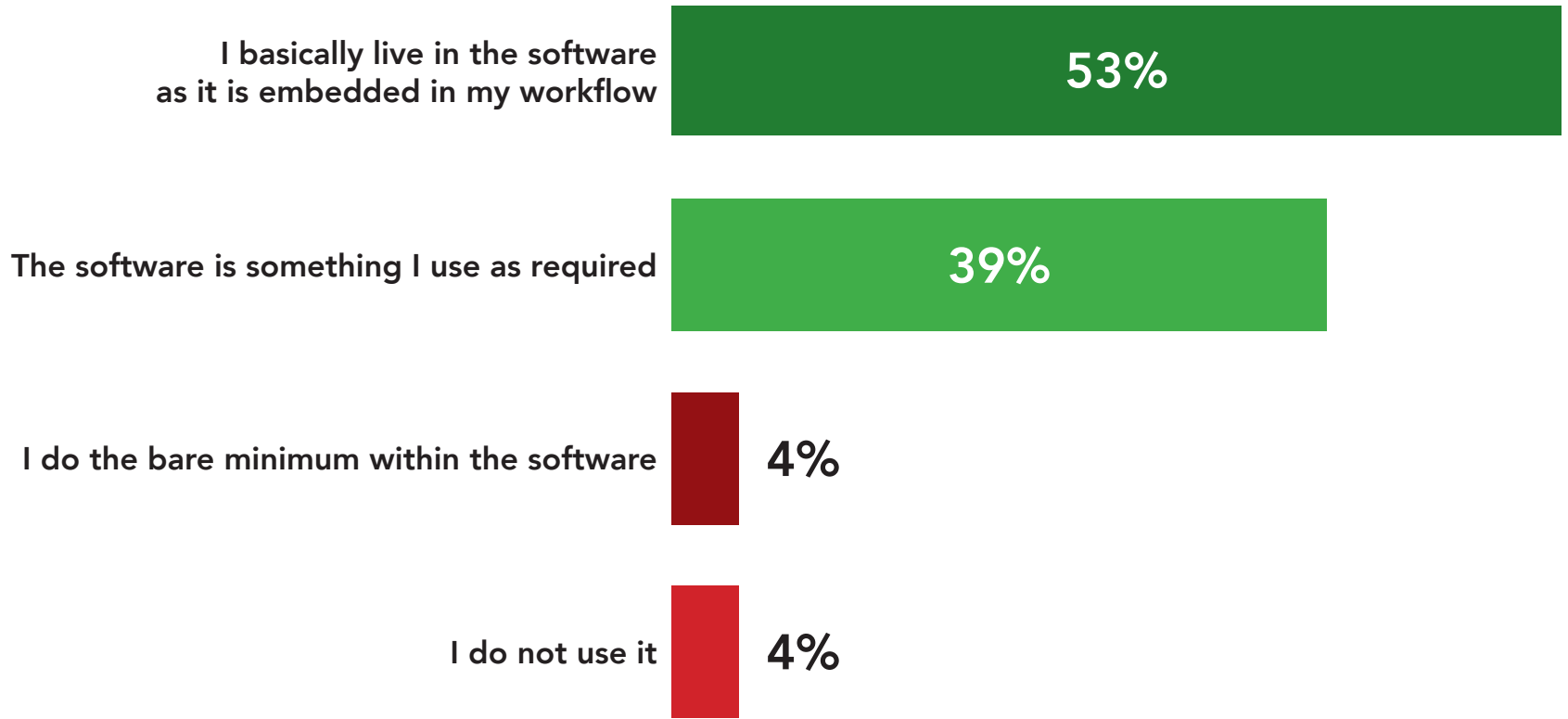
3 IN 4 SAY USE OF SALES PIPELINE TOOLS IS MANDATED BY THE COMPANY

Is the use of CRM or sales pipeline tools mandated by the company or are you free to use or not use the software?



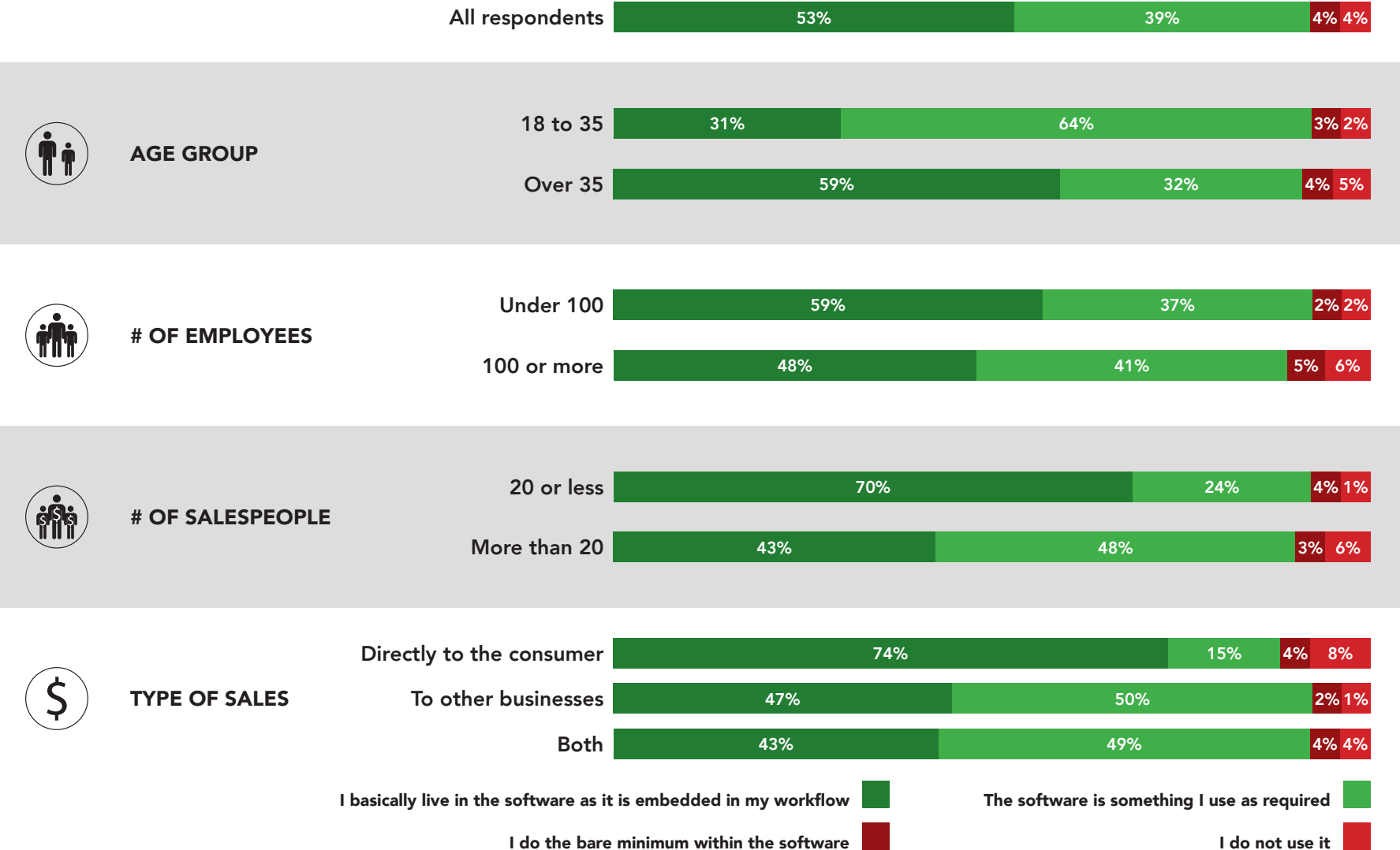
USE OF SALES PIPELINE SOFTWARE

How would you describe your use of the CRM or sales pipeline software?



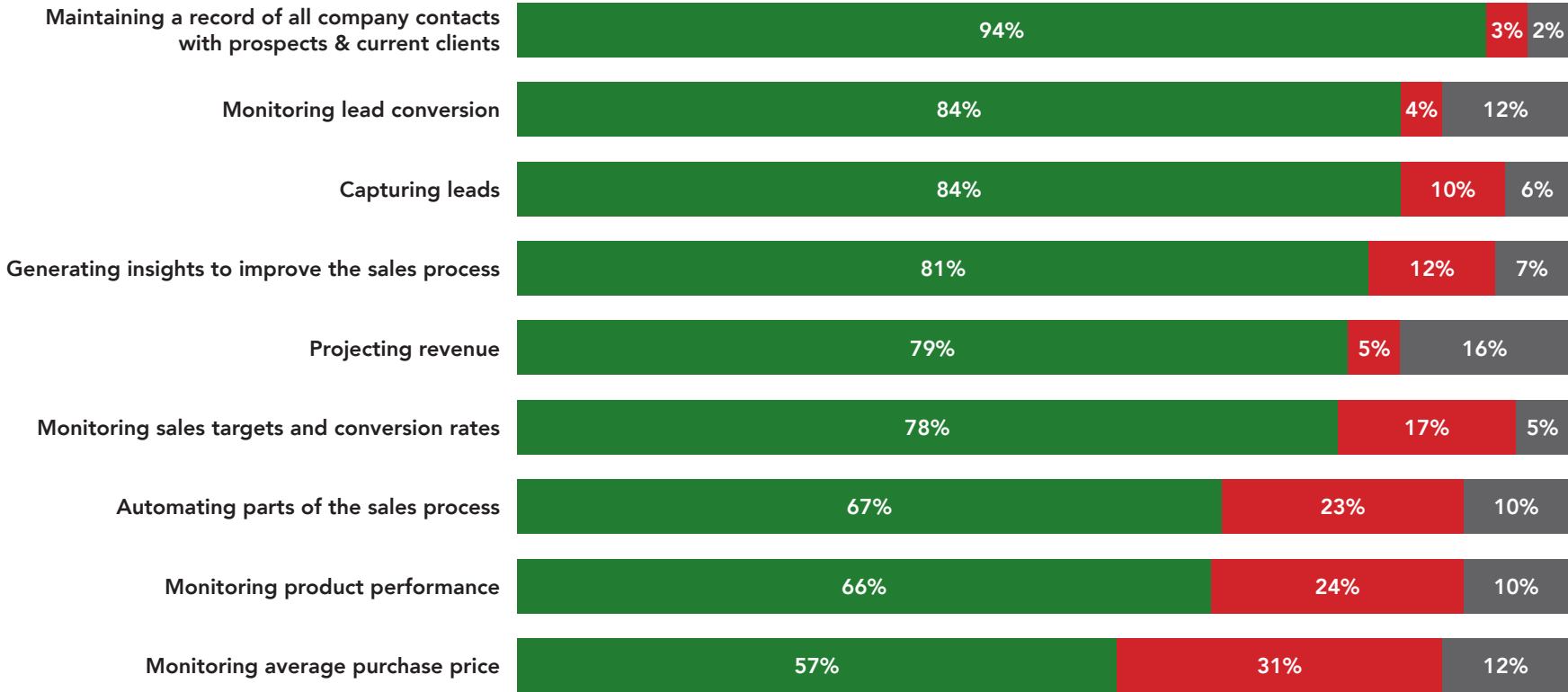
USE OF SALES PIPELINE SOFTWARE

How would you describe your use of the CRM or sales pipeline software?



USE OF SALES PIPELINE SOFTWARE FOR...

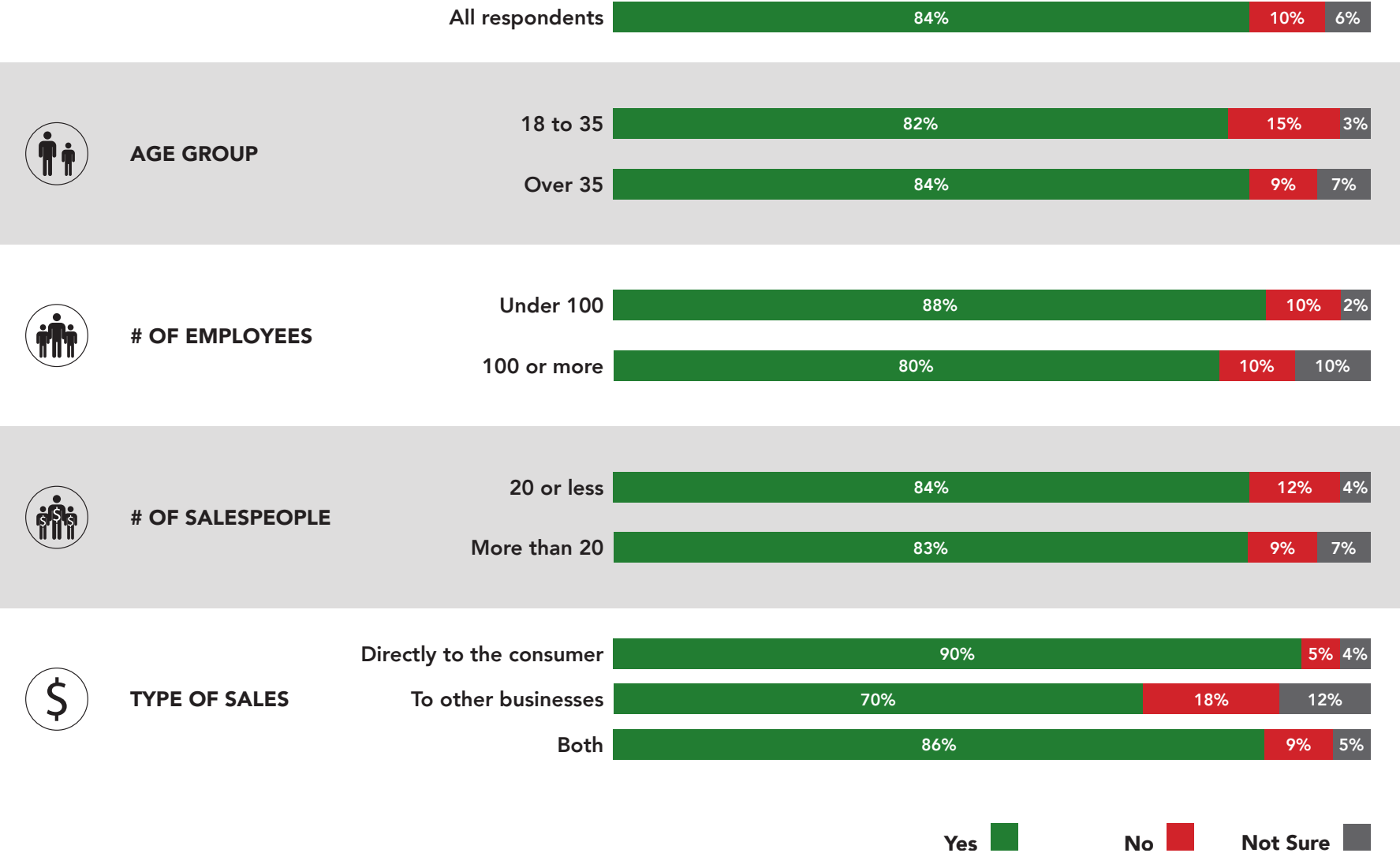
Do you or your organization use the CRM or sales pipeline tool software for any of the following?



Yes ■ No ■ Not Sure ■

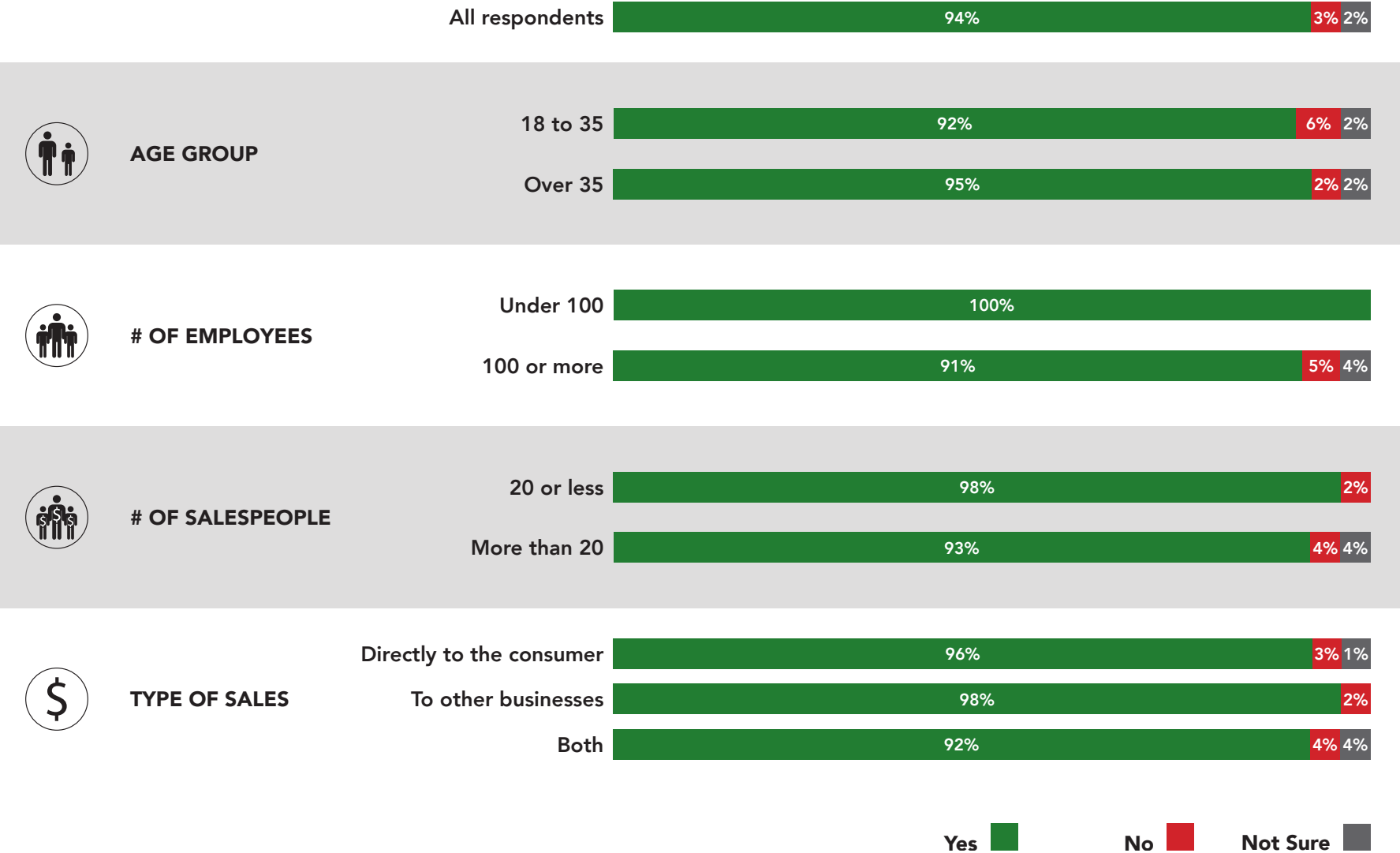
USE OF SALES PIPELINE SOFTWARE FOR... CAPTURING LEADS

Do you or your organization use the CRM or sales pipeline tool software for any of the following?



USE OF SALES PIPELINE SOFTWARE FOR... MAINTAINING A RECORD OF ALL COMPANY CONTACTS WITH PROSPECTS AND CURRENT CLIENTS

Do you or your organization use the CRM or sales pipeline tool software for any of the following?



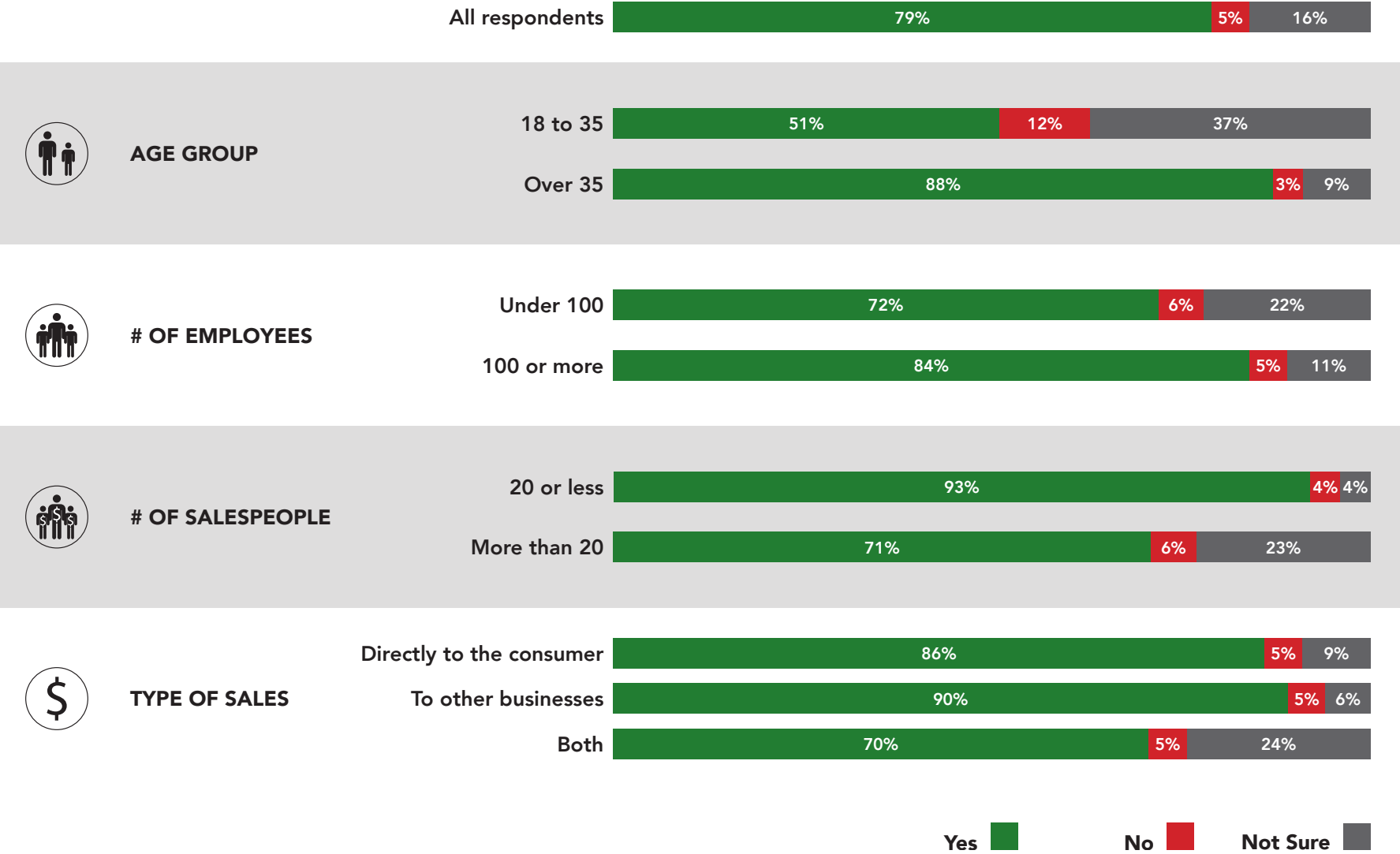
USE OF SALES PIPELINE SOFTWARE FOR... AUTOMATING PARTS OF THE SALES PROCESS

Do you or your organization use the CRM or sales pipeline tool software for any of the following?



USE OF SALES PIPELINE SOFTWARE FOR... PROJECTING REVENUE

Do you or your organization use the CRM or sales pipeline tool software for any of the following?



USE OF SALES PIPELINE SOFTWARE FOR... MONITORING SALES TARGETS AND CONVERSION RATES

Do you or your organization use the CRM or sales pipeline tool software for any of the following?



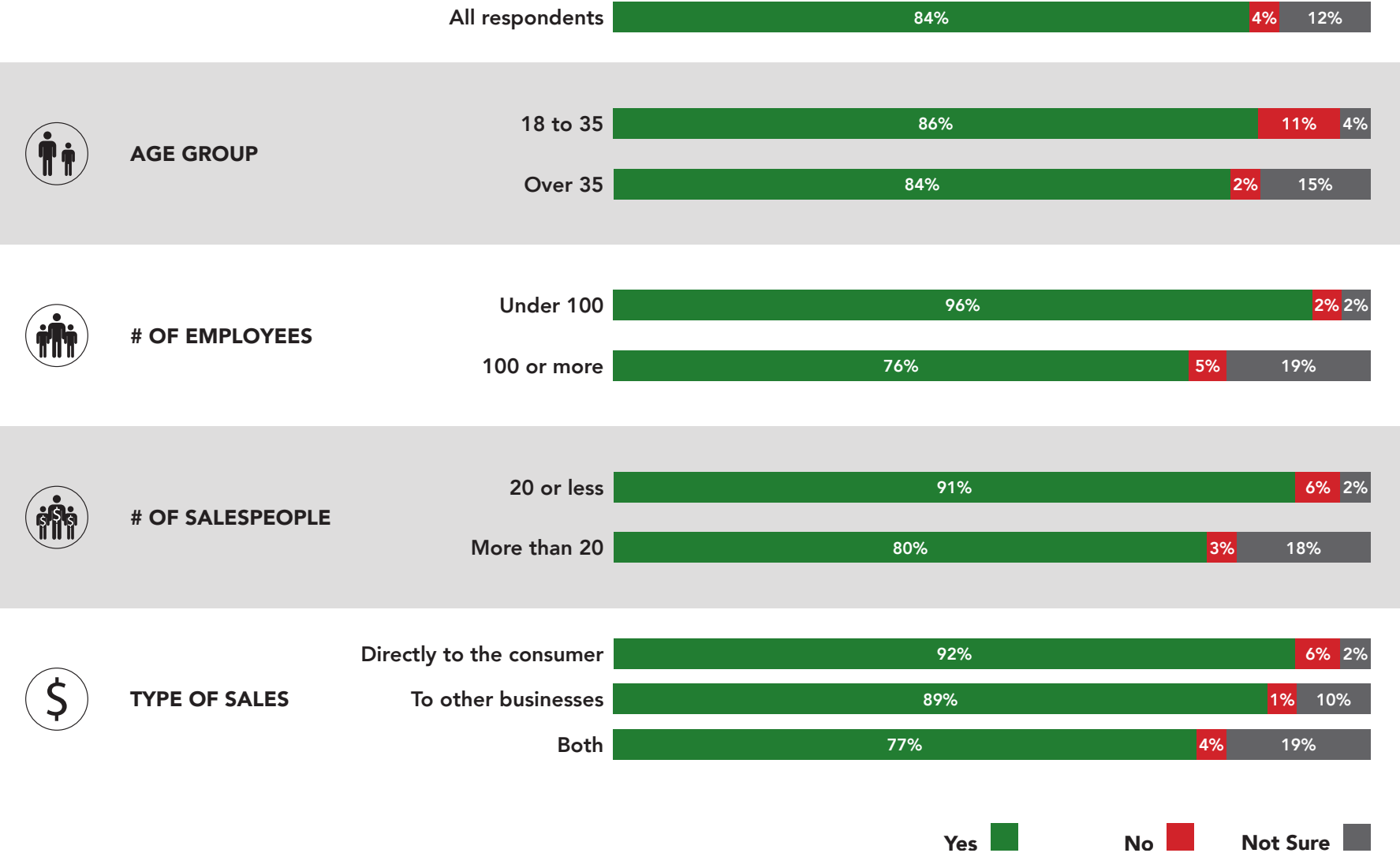
USE OF SALES PIPELINE SOFTWARE FOR... MONITORING PRODUCT PERFORMANCE

Do you or your organization use the CRM or sales pipeline tool software for any of the following?



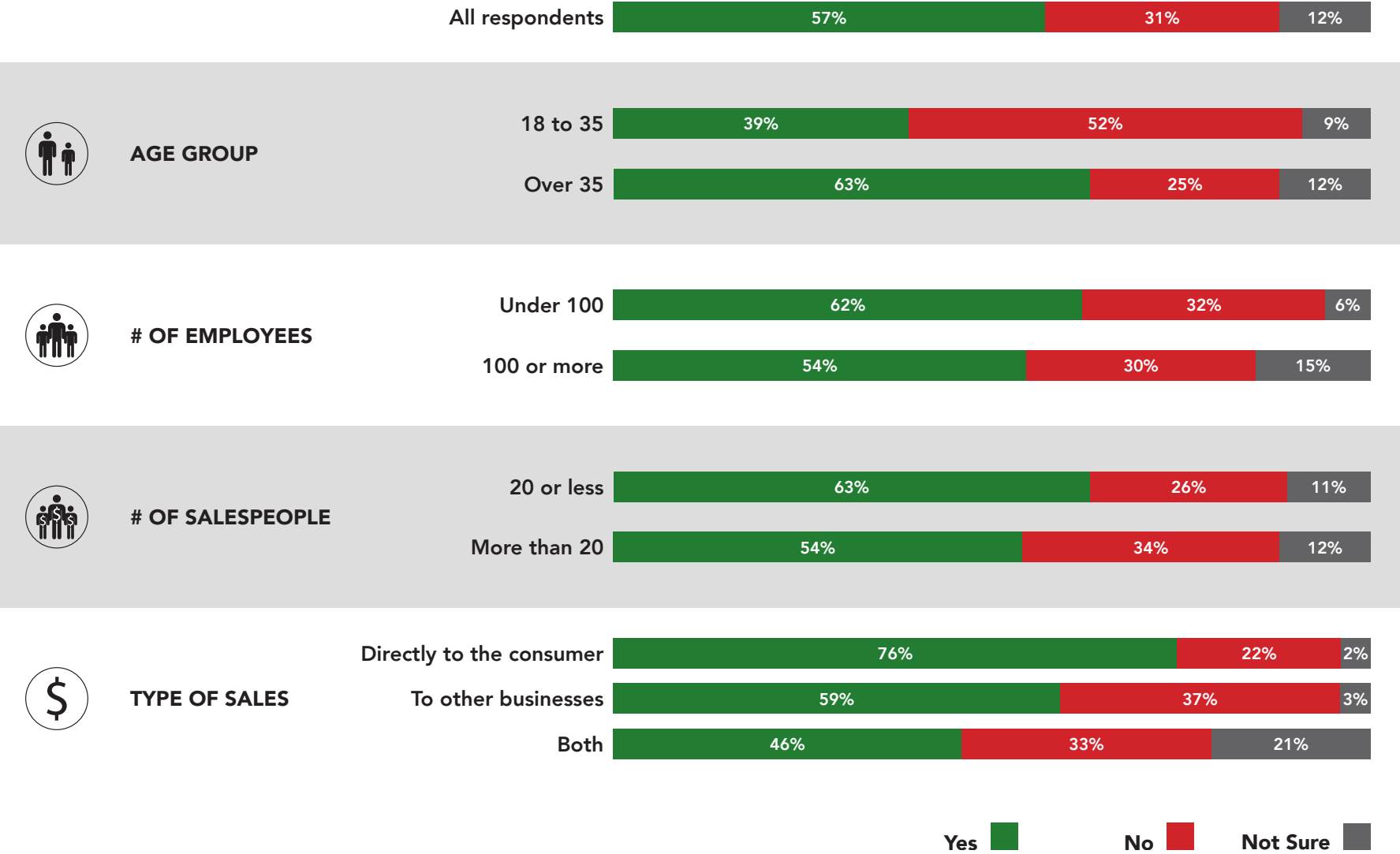
USE OF SALES PIPELINE SOFTWARE FOR... MONITORING LEAD CONVERSION

Do you or your organization use the CRM or sales pipeline tool software for any of the following?



USE OF SALES PIPELINE SOFTWARE FOR... MONITORING AVERAGE PURCHASE PRICE

Do you or your organization use the CRM or sales pipeline tool software for any of the following?



USE OF SALES PIPELINE SOFTWARE FOR... GENERATING INSIGHTS TO IMPROVE THE SALES PROCESS

Do you or your organization use the CRM or sales pipeline tool software for any of the following?



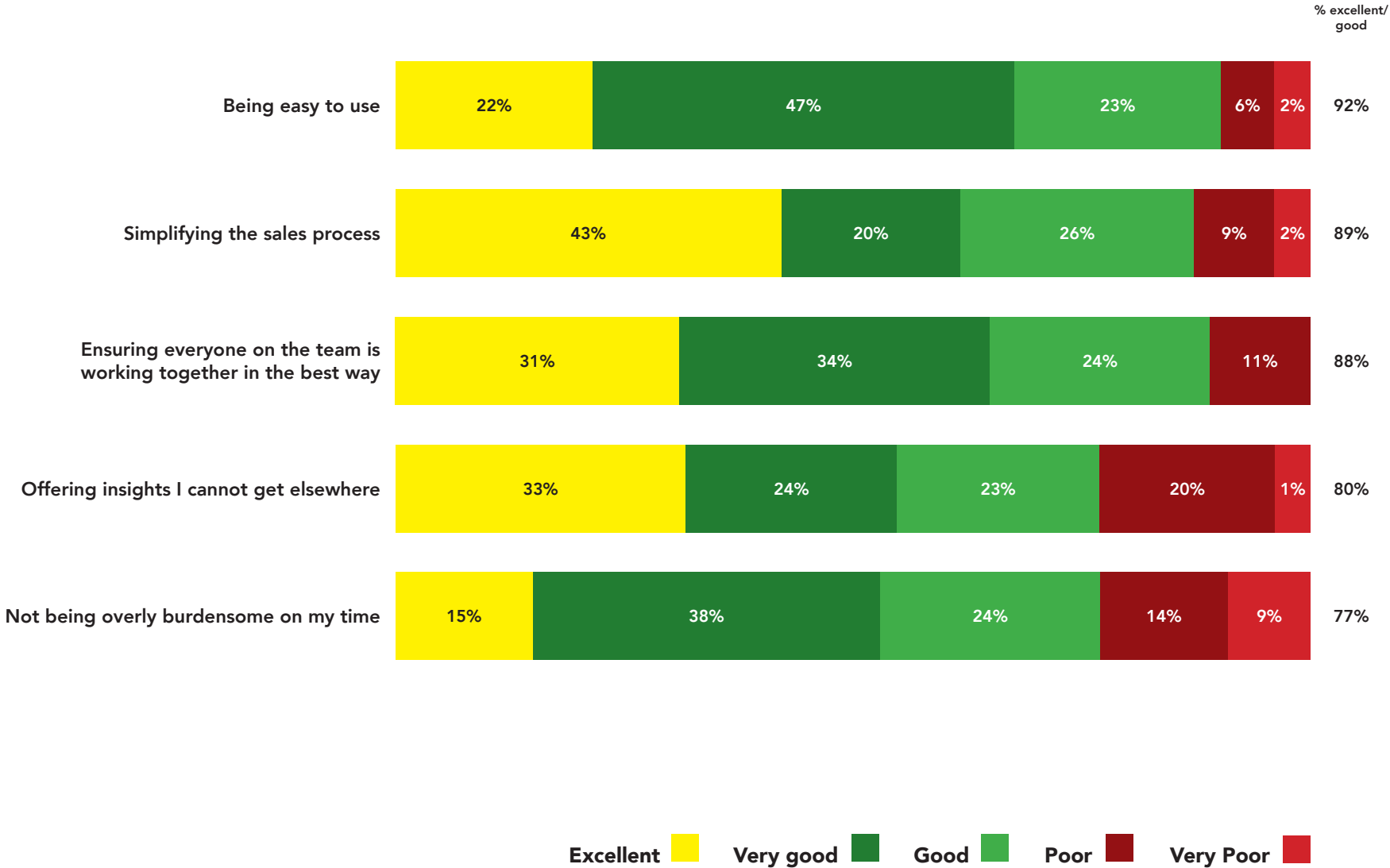
KEY FINDINGS

5. Performance of the software they use on key attributes is overall very positive. Among the top rated are that the software is easy to use, it simplifies the sales process, and it ensures that everyone on the team is working together.
6. 4 in 10 rate the software they use as “excellent” on simplifying the sales process.
7. The software they use also receives high marks (77%-80% excellent/good) for offerings insights they can't get anywhere else and not being overly burdensome on their time.
8. Among daily users, 3 in 4 spend less than 3 hours a day using the software, and the other quarter spending more than that. And 11% say they are always working within the software.
9. Most received training on the software their company uses when they joined their company or as new software was introduced, and 8 in 10 say they receive ongoing training/support to improve their proficiency and skills.
10. Nearly 9 in 10 say the training they've received on the software was and is effective. Few feel otherwise.



PERFORMANCE OF SOFTWARE FOR KEY ATTRIBUTES

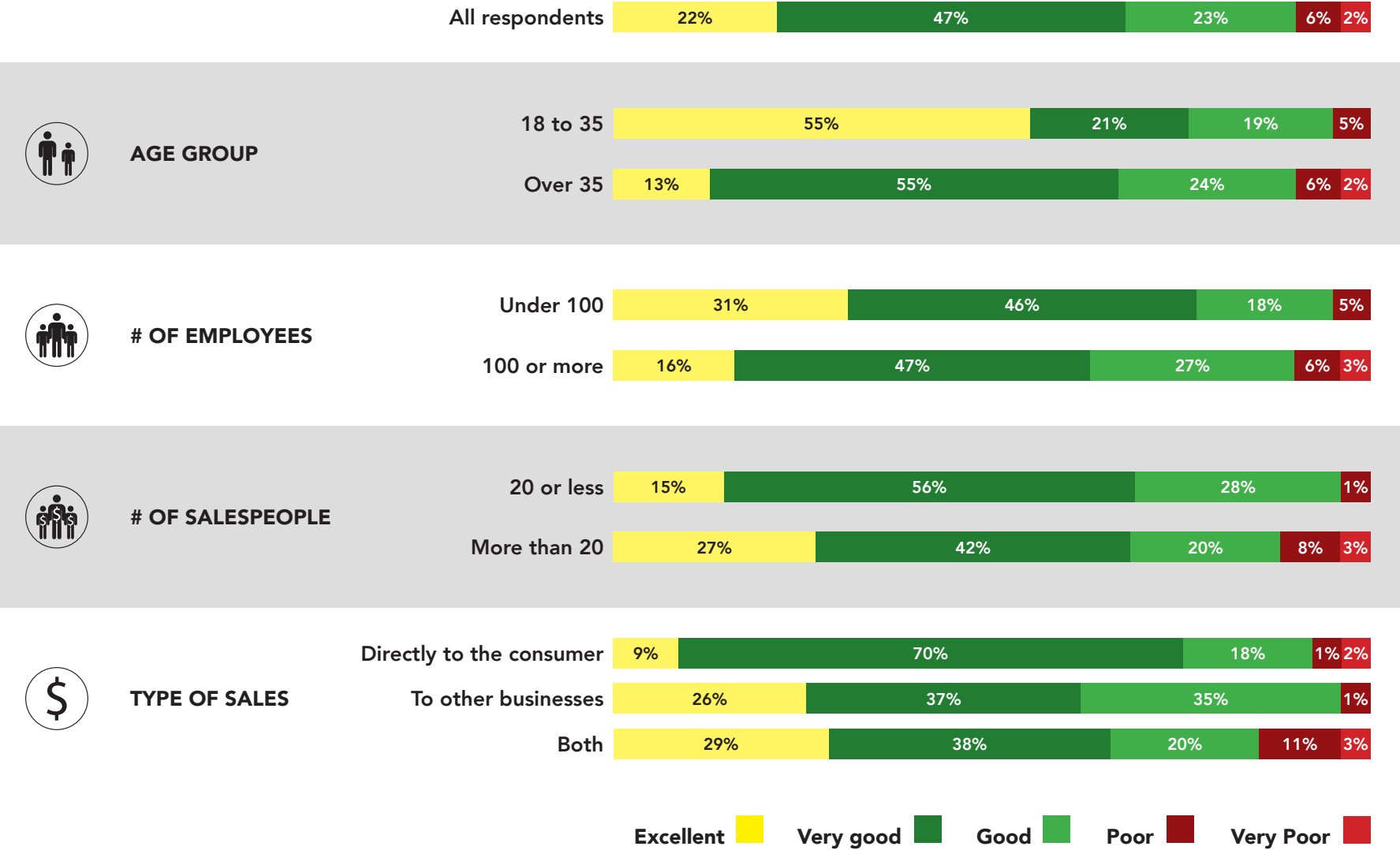
How would you rate the software on each of the following attributes?



PERFORMANCE OF SOFTWARE FOR KEY ATTRIBUTES

BEING EASY TO USE

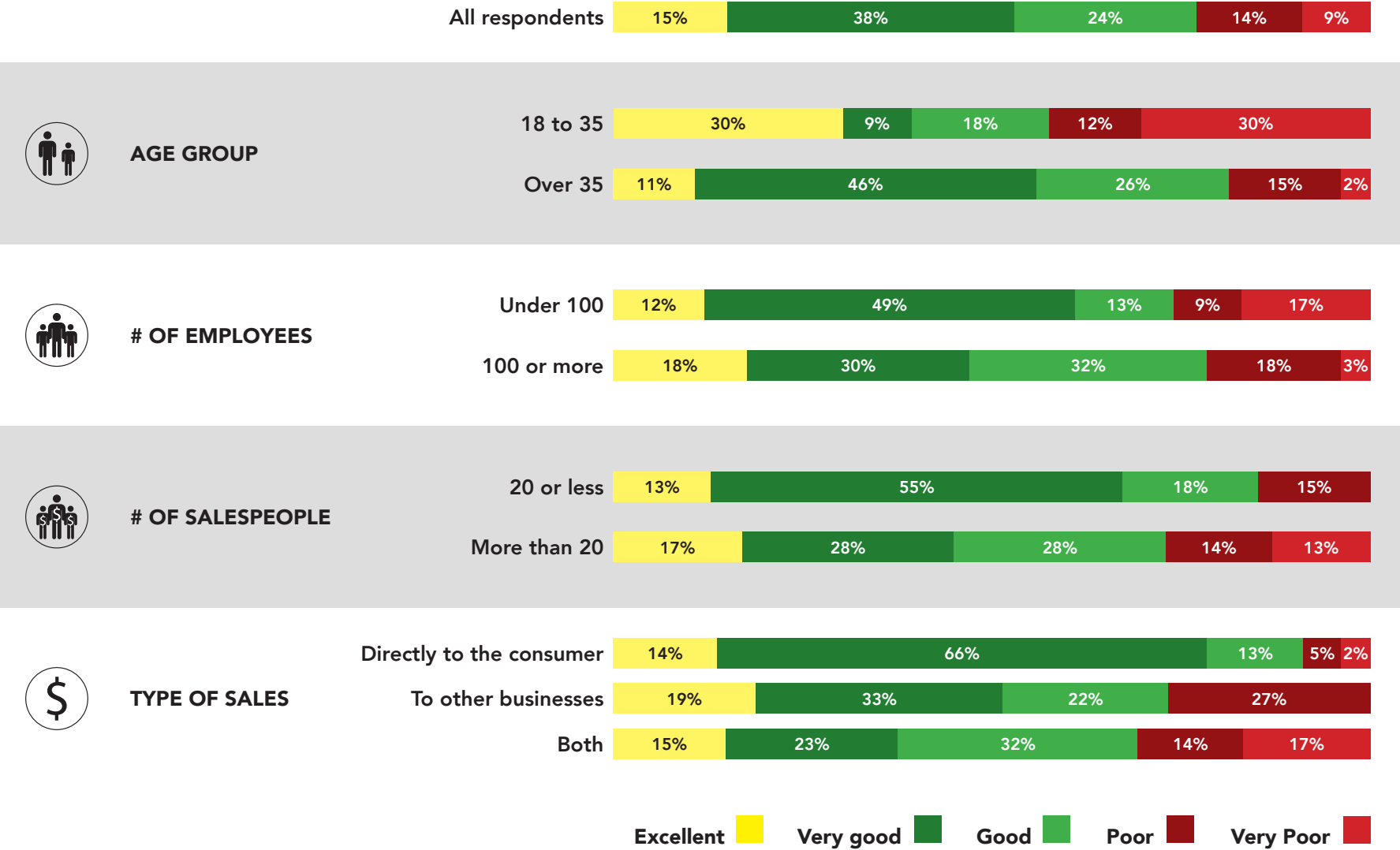
How would you rate the software on each of the following attributes?



PERFORMANCE OF SOFTWARE FOR KEY ATTRIBUTES

NOT BEING OVERLY BURDENSOME ON MY TIME

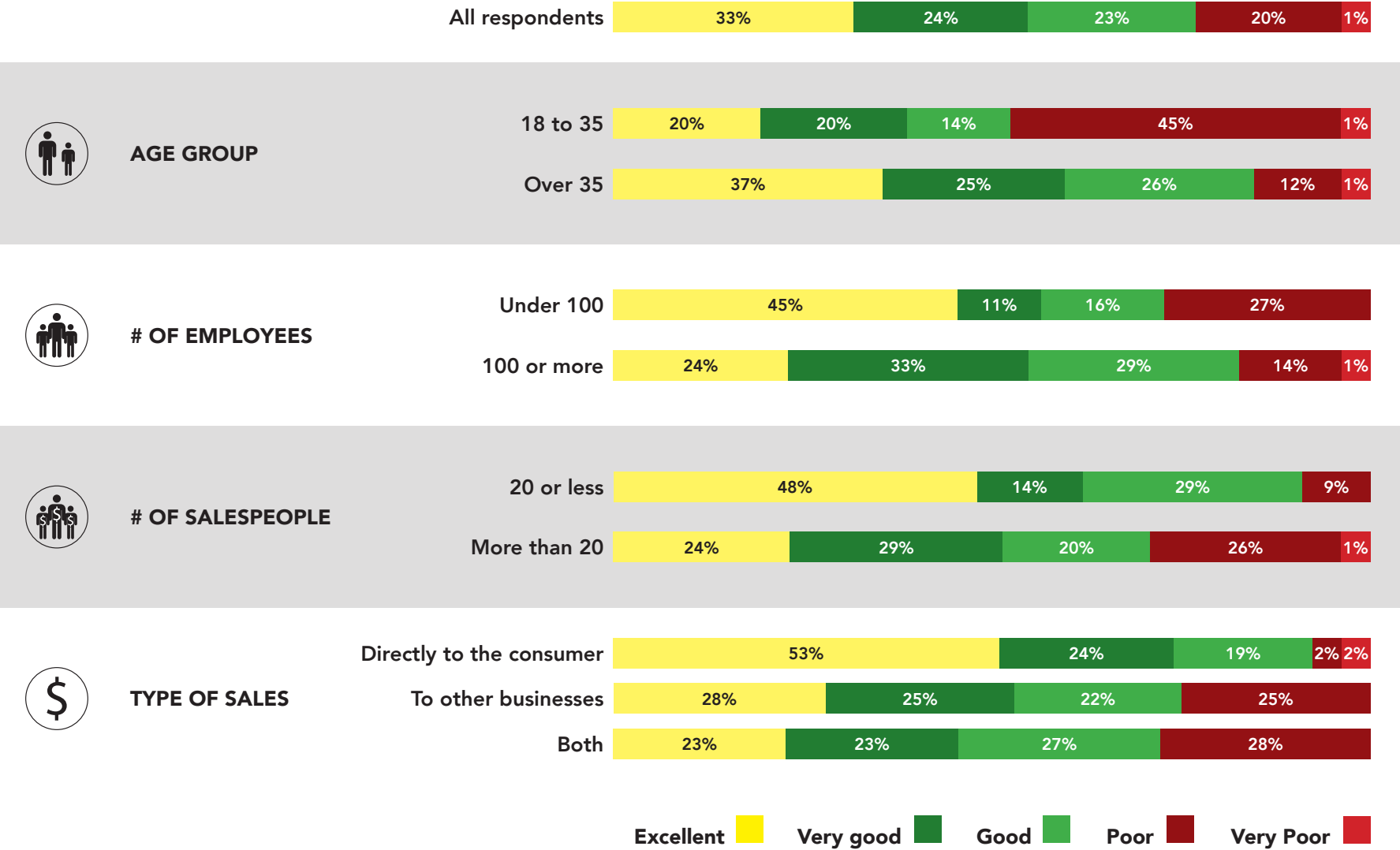
How would you rate the software on each of the following attributes?



PERFORMANCE OF SOFTWARE FOR KEY ATTRIBUTES

OFFERING INSIGHTS I CANNOT GET ELSEWHERE

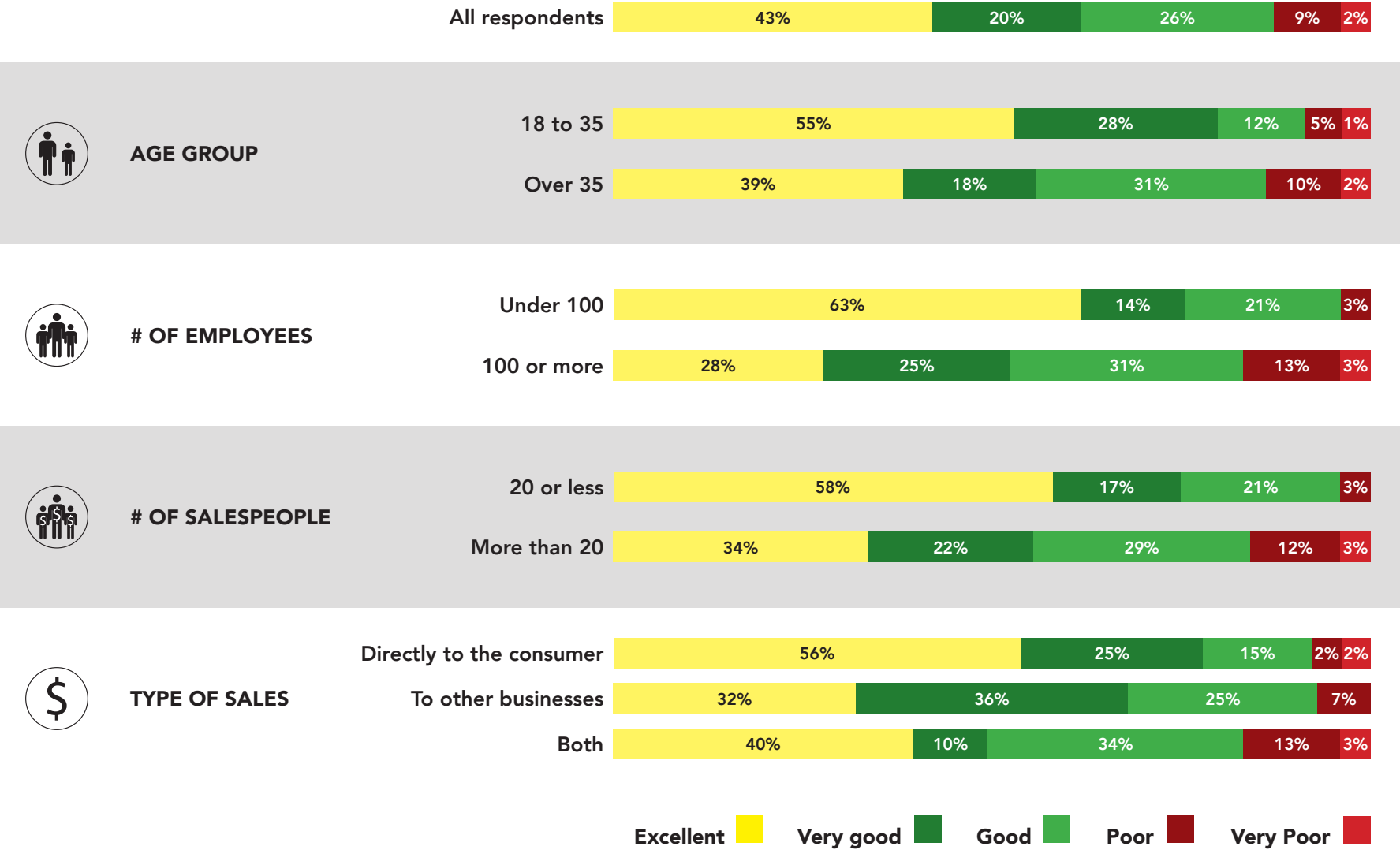
How would you rate the software on each of the following attributes?



PERFORMANCE OF SOFTWARE FOR KEY ATTRIBUTES

SIMPLIFYING THE SALES PROCESS

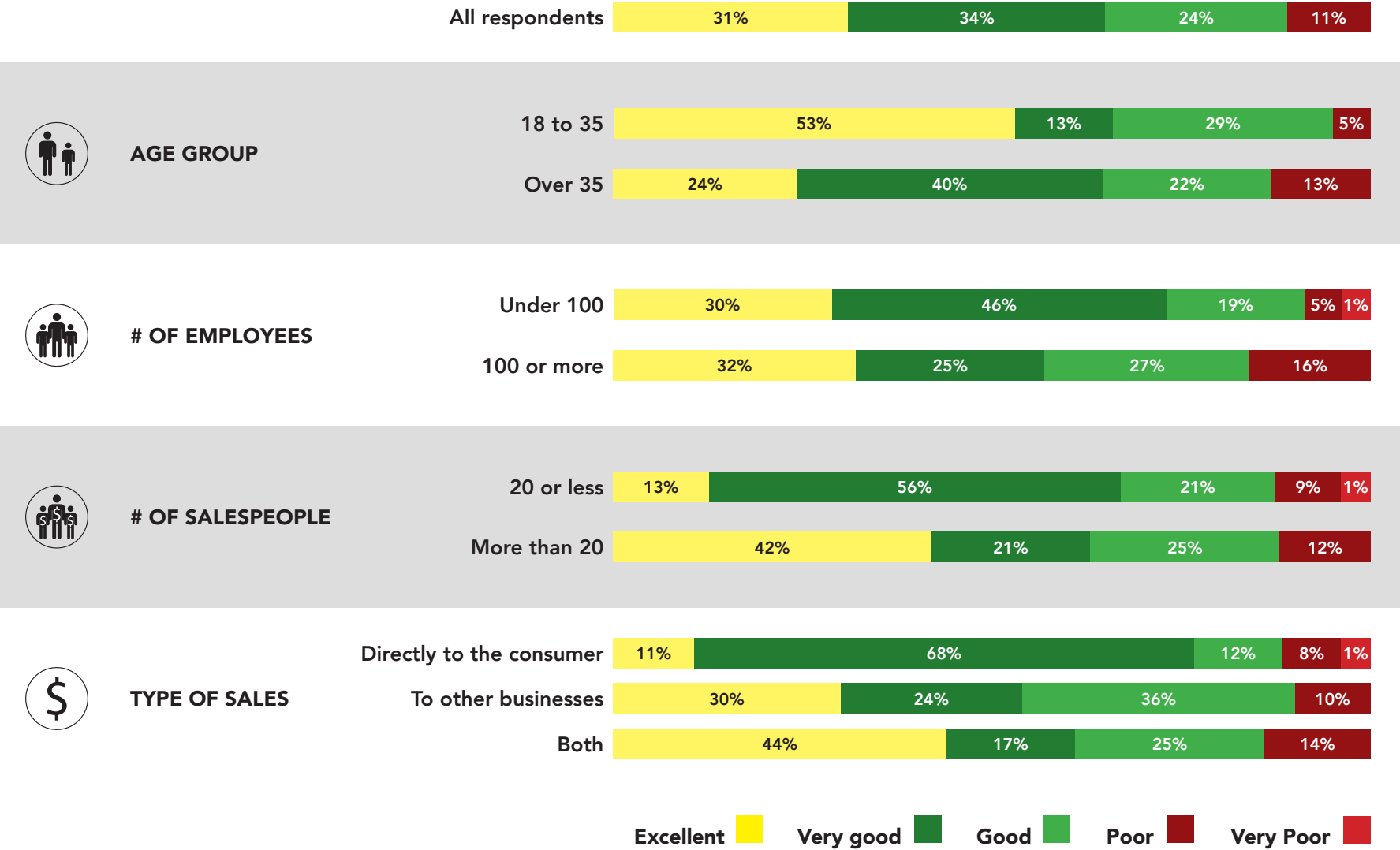
How would you rate the software on each of the following attributes?



PERFORMANCE OF SOFTWARE FOR KEY ATTRIBUTES

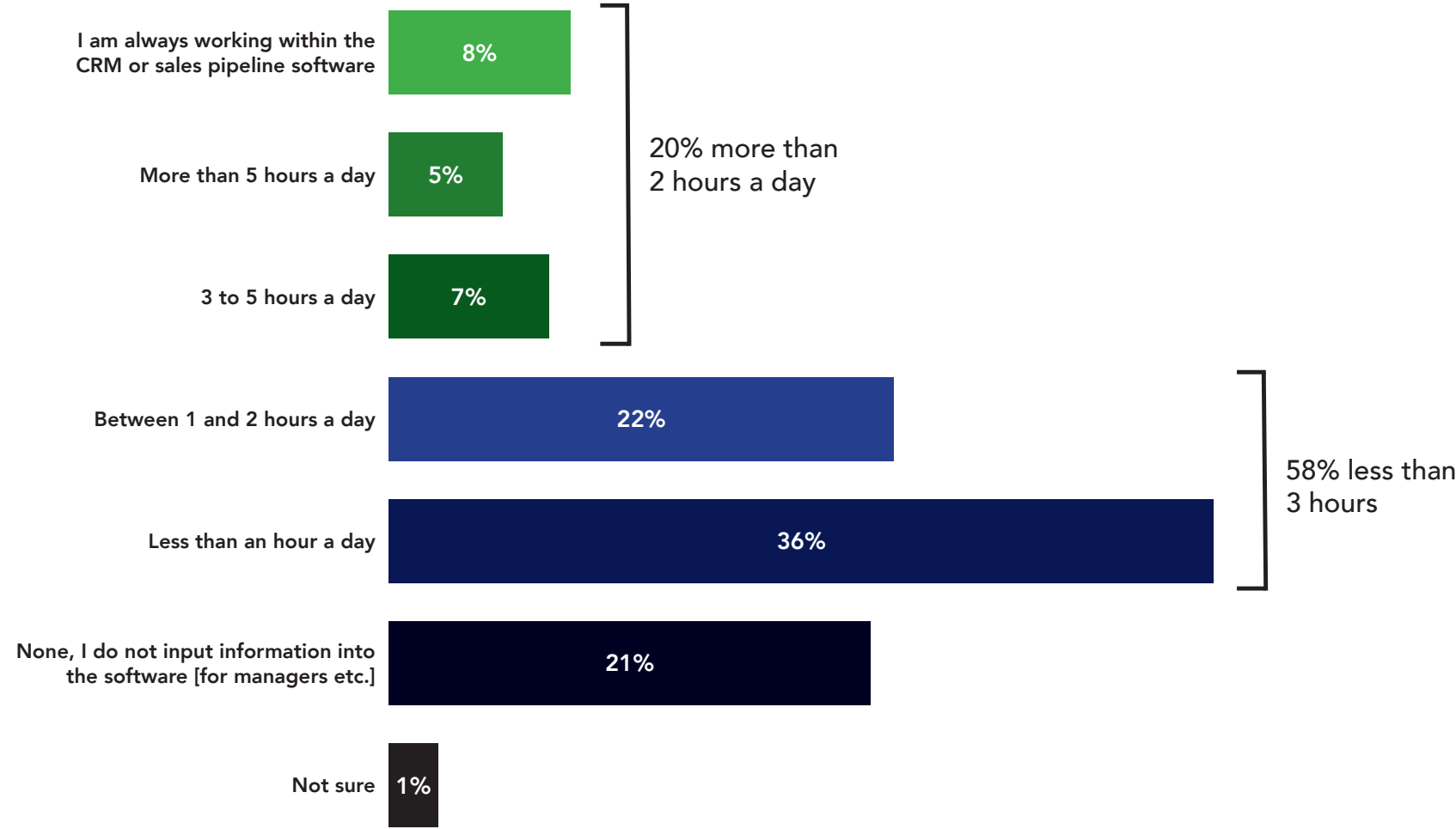
ENSURING EVERYONE ON THE TEAM IS WORKING TOGETHER IN THE BEST WAY

How would you rate the software on each of the following attributes?



DAILY TIME SPENT USING SALES PIPELINE SOFTWARE

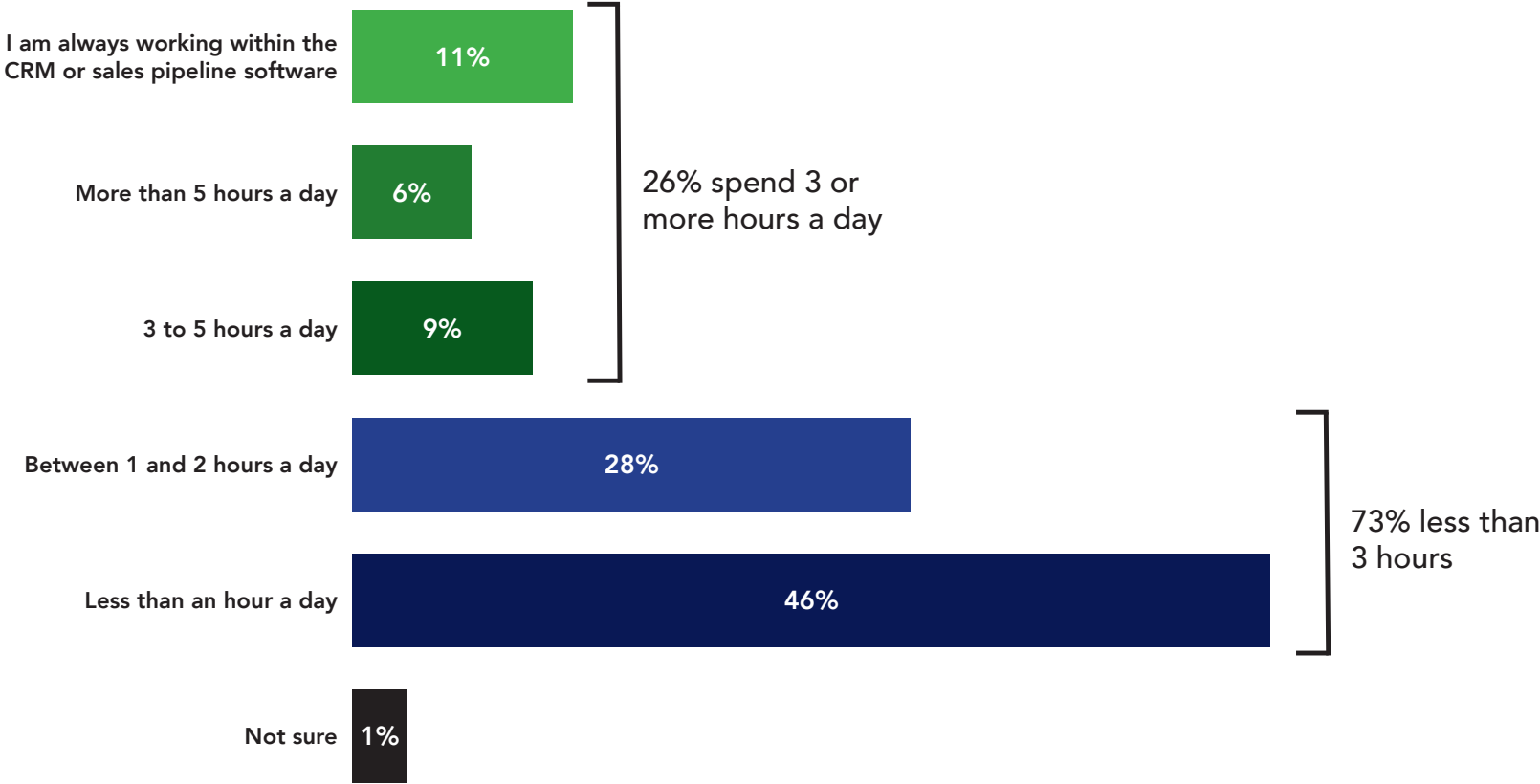
How much time do you spend inputting information into the CRM or sales pipeline software?



DAILY TIME SPENT USING SALES PIPELINE SOFTWARE

THOSE THAT USE SOFTWARE DAILY

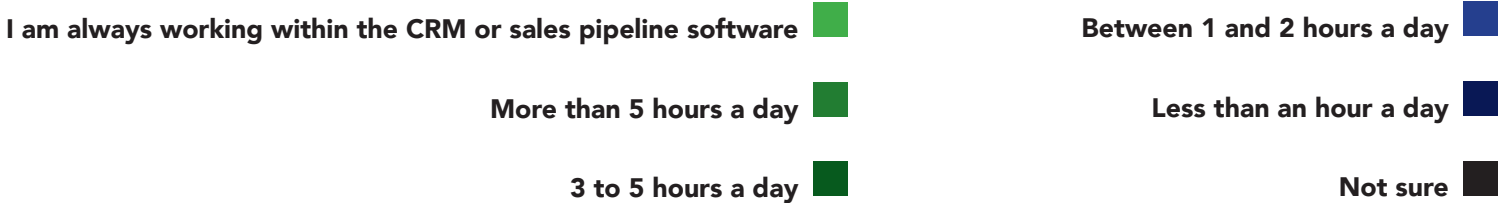
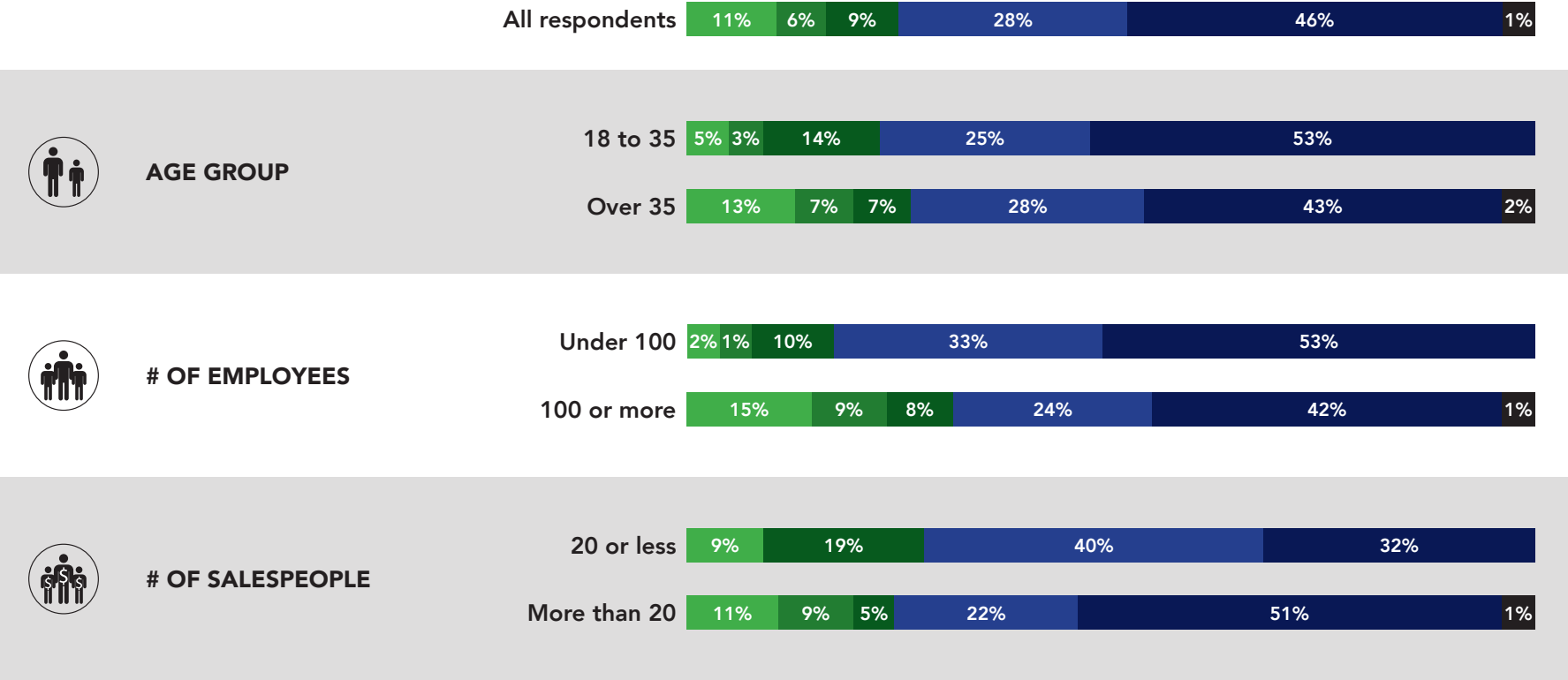
How much time do you spend inputting information into the CRM or sales pipeline software?
[Those that use software daily]



DAILY TIME SPENT USING SALES PIPELINE SOFTWARE

THOSE THAT USE SOFTWARE DAILY

How much time do you spend inputting information into the CRM or sales pipeline software?
 [Those that use software daily]

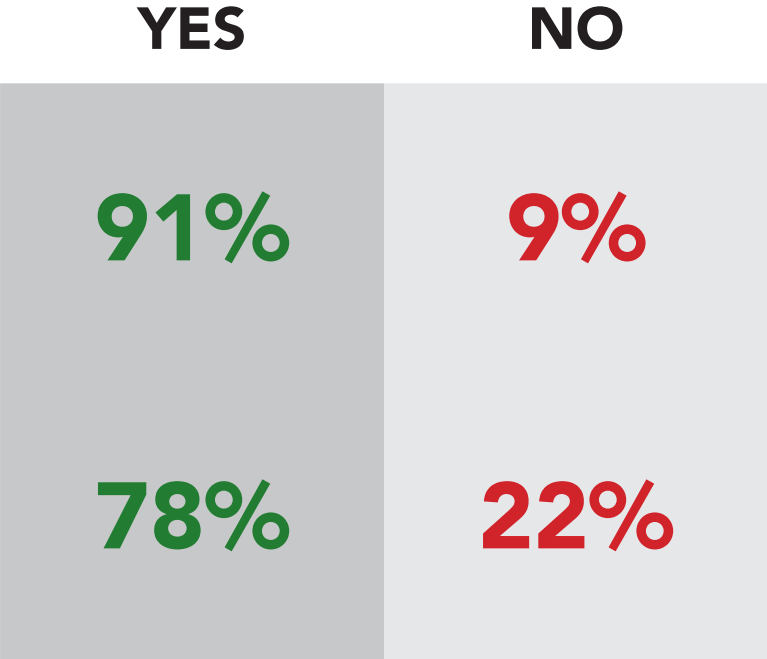


RECEIVED TRAINING FOR THE FOLLOWING

Did you receive the following types of training on how to use the CRM or sales pipeline you currently use?

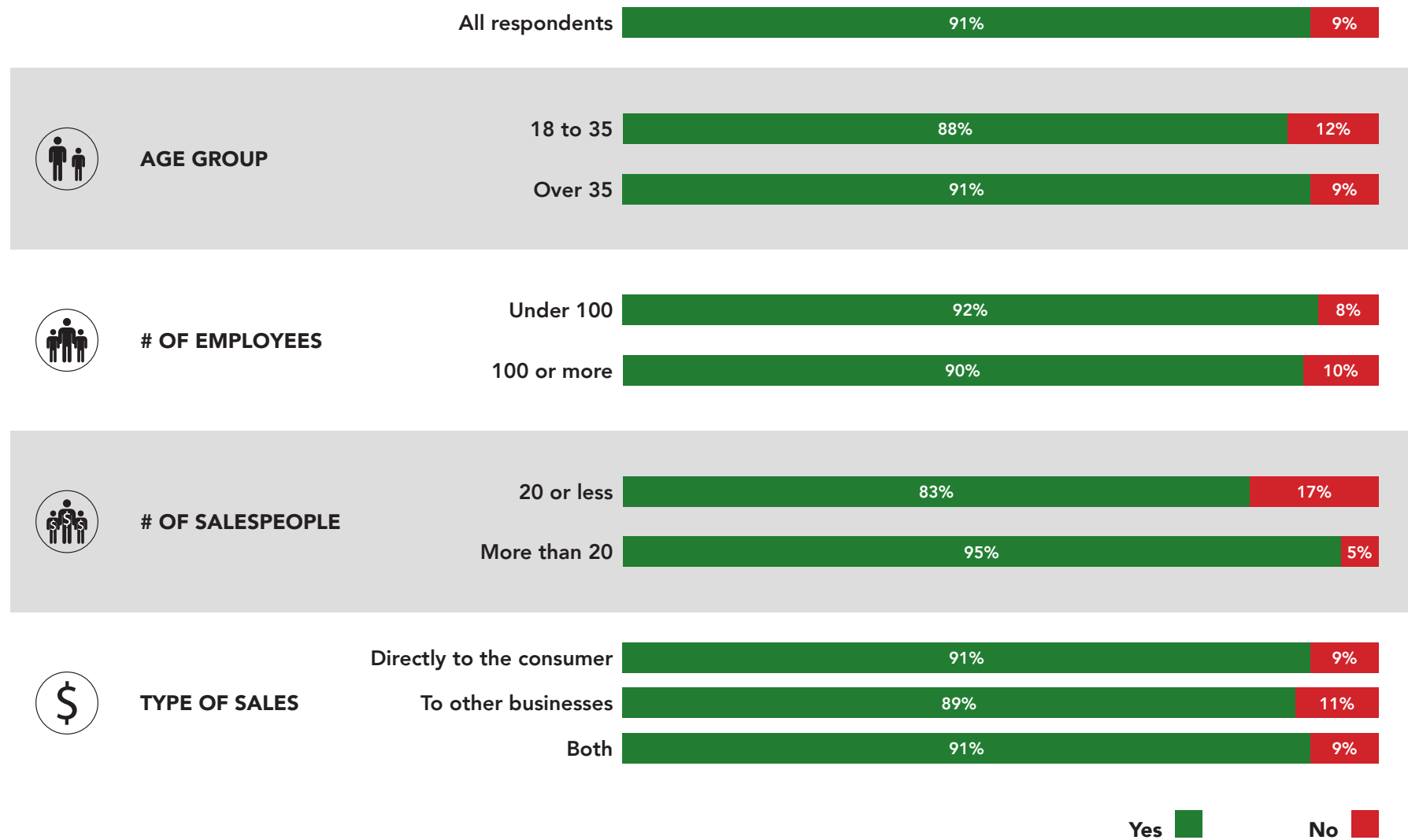
Onboarding training when the software was introduced, or I joined the company

On-going training and support to improve your proficiency and skills



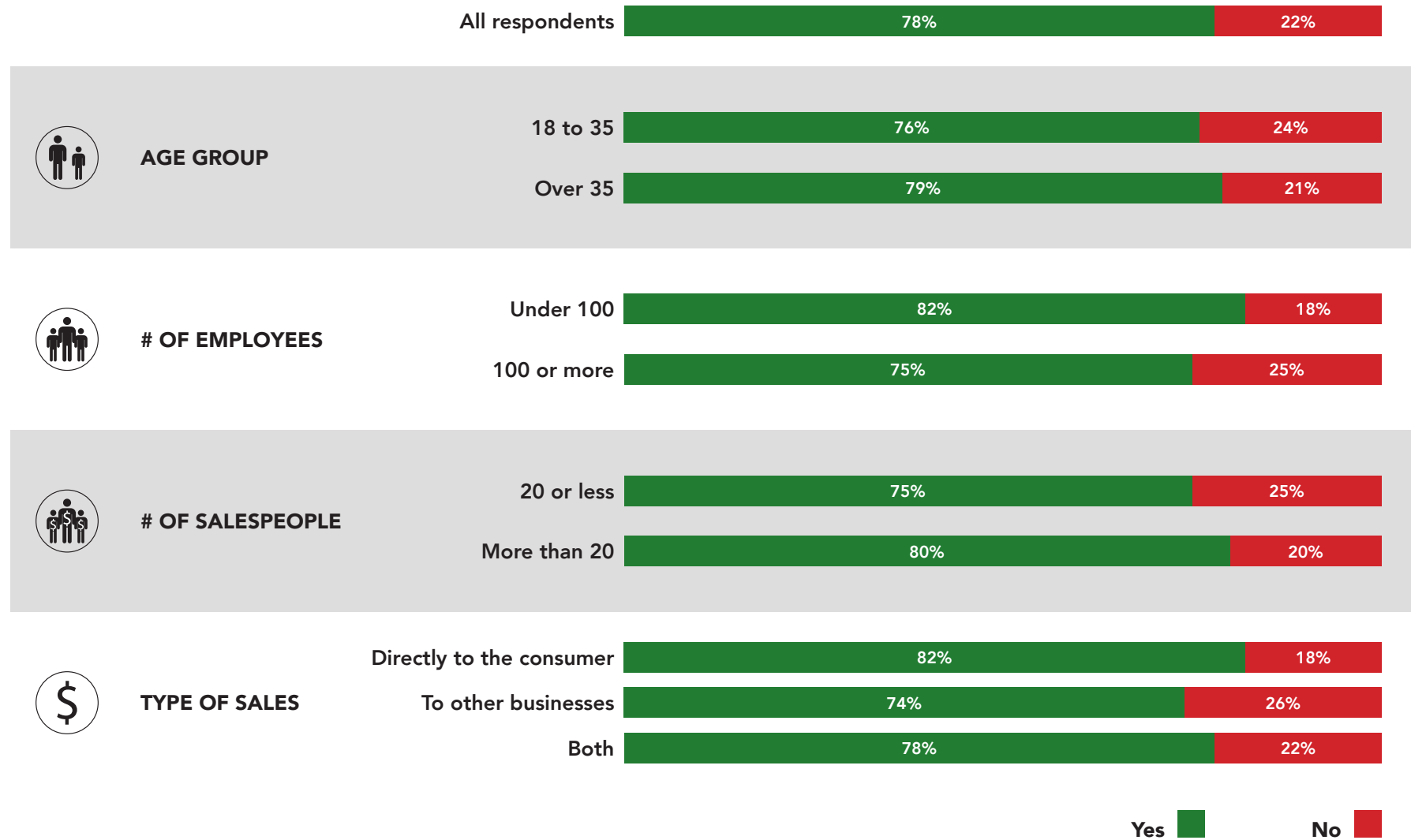
RECEIVED ONBOARDING TRAINING WHEN THE SOFTWARE WAS INTRODUCED, OR I JOINED THE COMPANY

Did you receive the following types of training on how to use the CRM or sales pipeline you currently use?



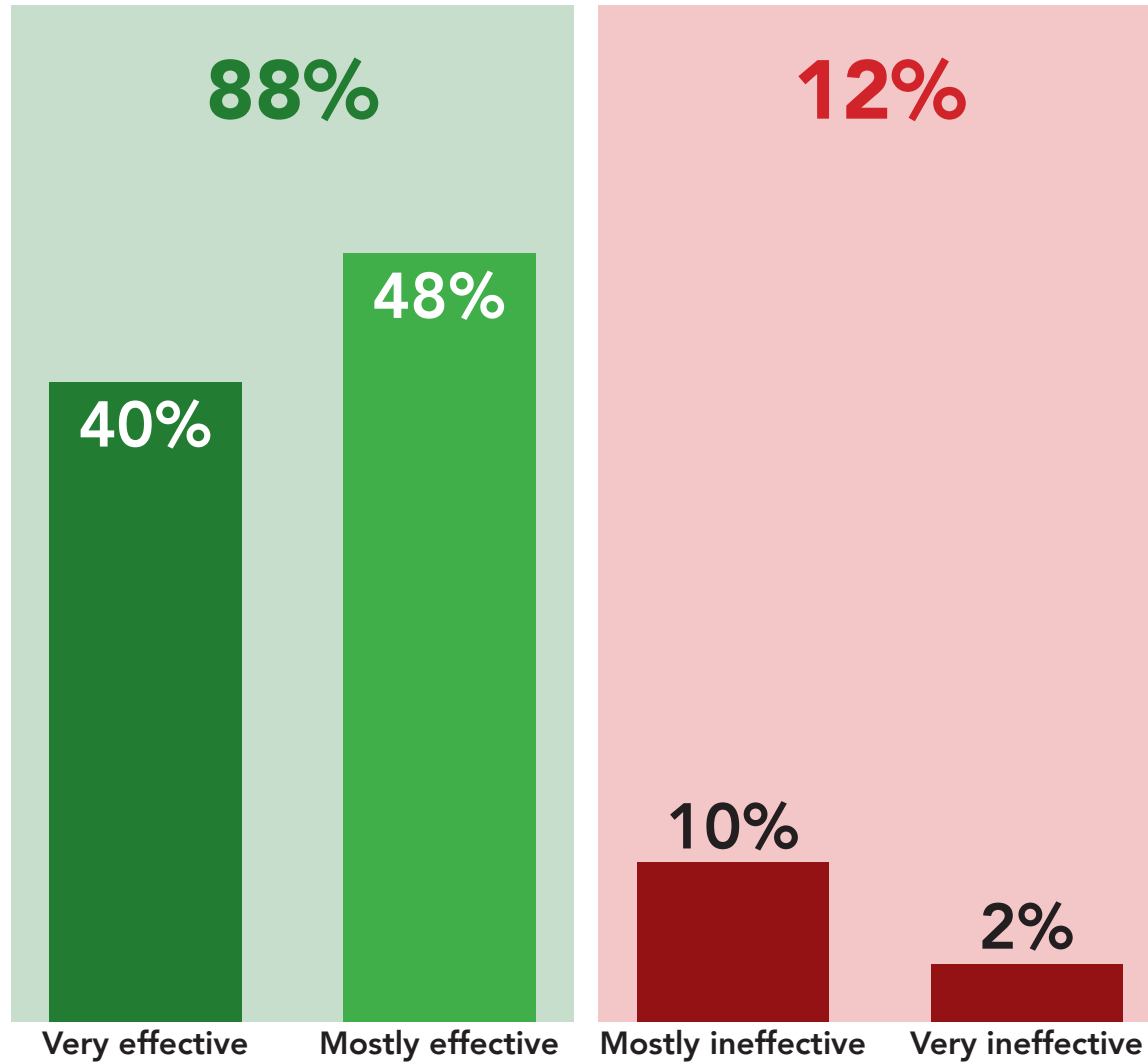
RECEIVED ON-GOING TRAINING AND SUPPORT TO IMPROVE PROFICIENCY AND SKILLS

Did you receive the following types of training on how to use the CRM or sales pipeline you currently use?



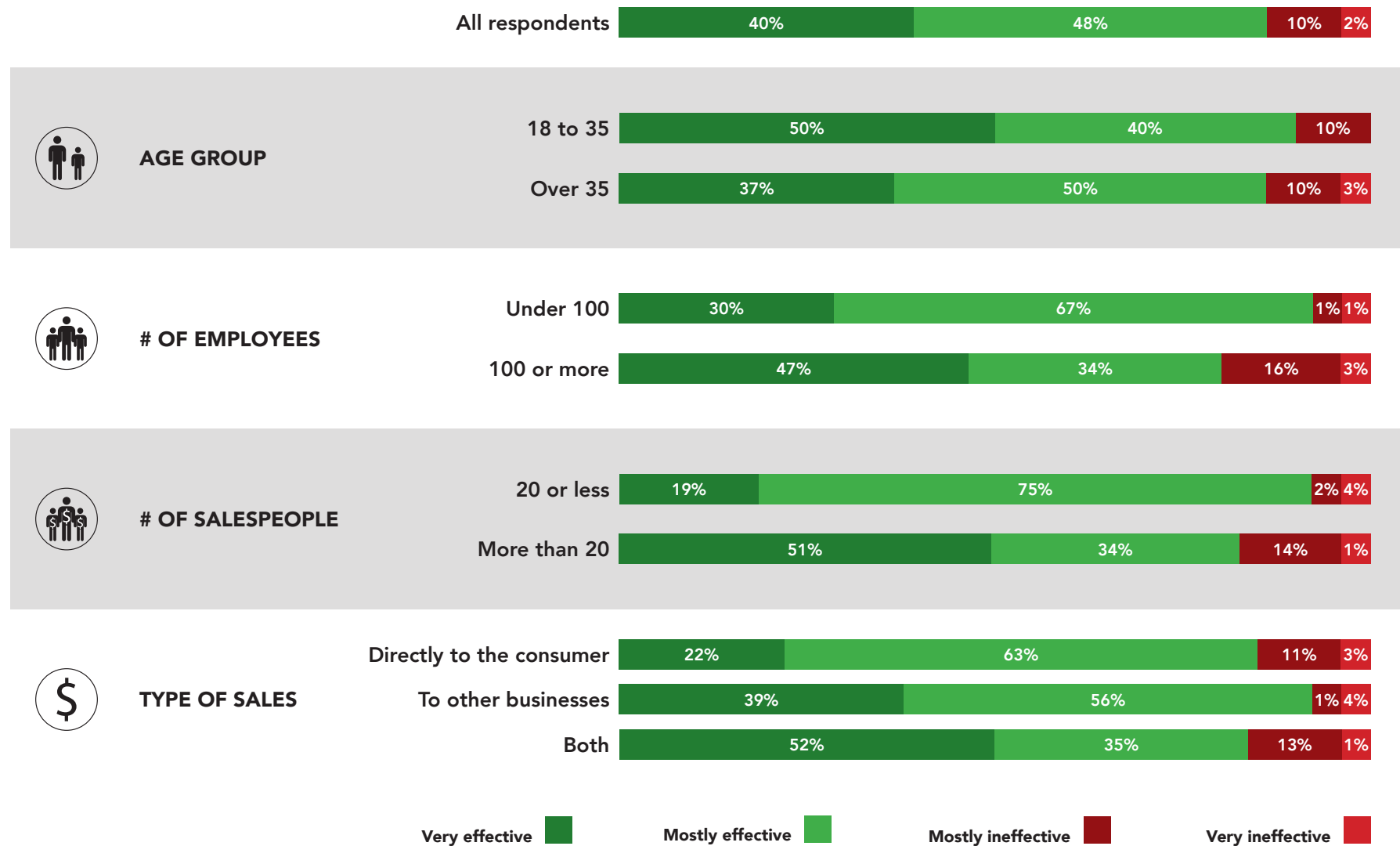
TRAINING EFFECTIVENESS


How effective was/is the training you received on the software?
[Those that received training]



TRAINING EFFECTIVENESS

How effective was/is the training you received on the software?
 [Those that received training]





MANAGERS OF SALES PROFESSIONALS

N=49

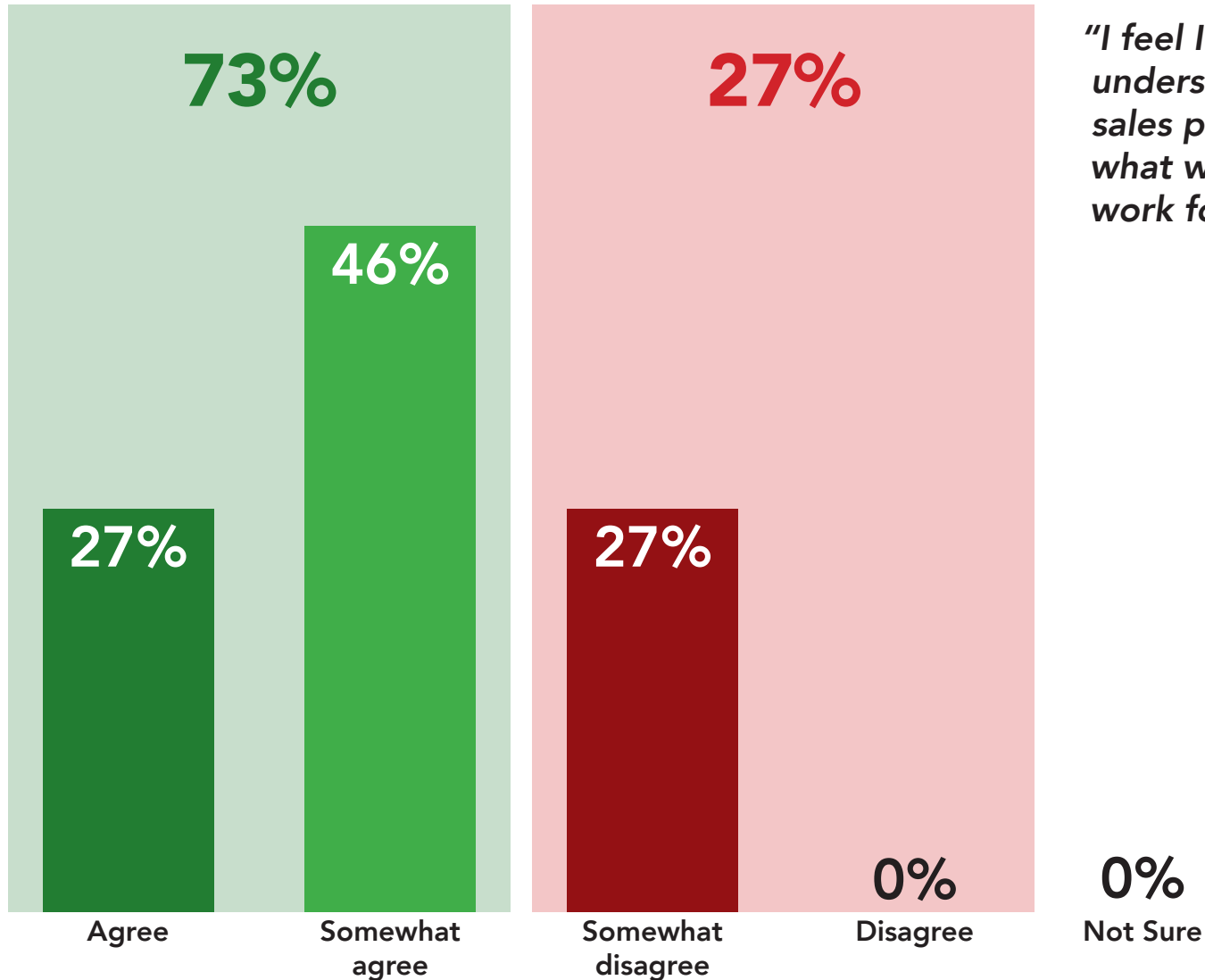
KEY FINDINGS

1. 3 in 4 managers of sales professionals feel that they have a good understanding of their sales performance and of what works and doesn't work for them.
2. Managers of sales professionals are overwhelmingly positive about the performance of the software they use on all attributes tested. Among the top rated is that the software they use gives the organization a clear view of its sales success.



3 IN 4 HAVE A GOOD UNDERSTANDING OF SALES PERFORMANCE AND WHAT WORKS

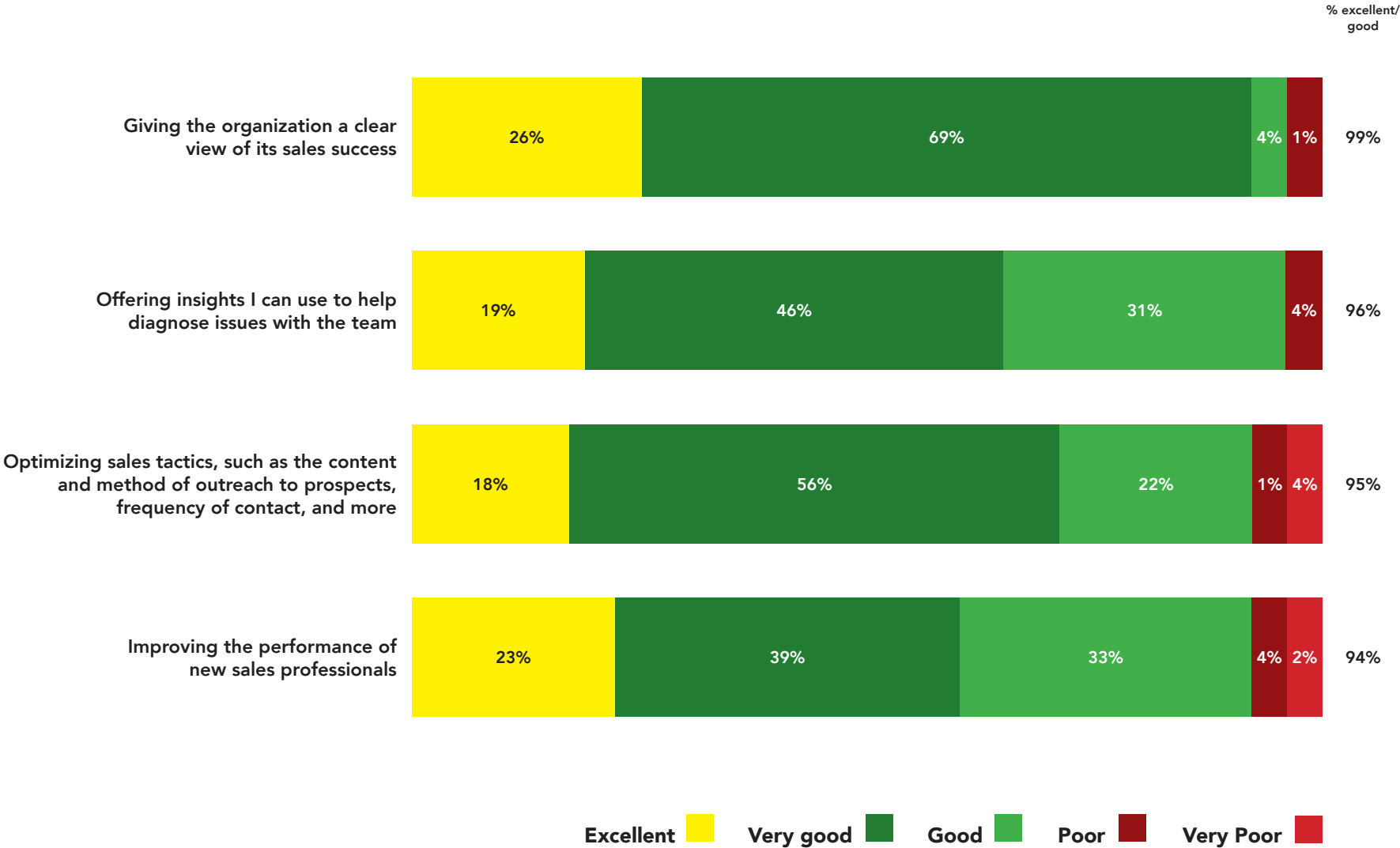
Do you agree or disagree with the following statement: I feel I have a very good understanding of our sales performance and what works and does not work for us.
[Managers of sales professionals]



"I feel I have a very good understanding of our sales performance and what works and does not work for us."

PERFORMANCE OF SOFTWARE FOR KEY ATTRIBUTES

How would you rate the software on each of the following attributes?
 [Managers of sales professionals]



A woman with long dark hair, wearing a white plaid shirt, is smiling and looking towards a man. The man is seen from the back, wearing a yellow shirt. They are sitting at a table with papers and a pen. The background is a plain, light-colored wall.

IN-DEPTH INTERVIEWS

KEY FINDINGS

1. The in-depth interviews provide additional depth of perspective on the issues covered in the online survey. Sales professionals identified some positive aspects about the role of sales software and sales analytics can play in their business. They also generally believe that technology will continue to play a greater role in the sales process.
2. Sales professional's positions are not expected to be threatened by the increase in use of software and data analytics and, instead, regard sales software as a useful tool in efficiently and cost-effectively meeting the needs of the business. Sales professionals expect those who do not makes use of new technology and software to fall behind.
3. The face-to-face interactions and personal touch of salespeople when working with clients and customers is considered irreplaceable regardless of any increase in software use in the future. Software does offer, however, opportunities to be more strategic about using in-person meetings as a sales tool.
4. There are a number of barriers to effective use of sales software and data analytics, including such things as legacy software, unique company processes, a lack of skills in analyzing generated data, a focus on data collection and entry over analysis, and the perception that the data is not contributing to an improved sales process. For companies, a key barrier is the cost of software and its implementation.
5. Though few companies offer ongoing training in software and data analytics, openness to additional training by vendors and independent sources is overwhelming. As a result, sales professionals believe that the implementation of new software should be gradual and accompanied by training initially so that the sales process is not harmed by the learning curve.
6. The pandemic experience has accelerated some shifts in the use of technology because of the limited ability to conduct sales processes in-person and remote access to programs.

CURRENT USAGE OF SALES SOFTWARE AND DATA ANALYTICS

1. Throughout the industry, sales software is primarily used for managing customer/potential customer information and touchpoints, as well as for marketing and lead generation, and monitoring/capturing sales professional activity. Data analytics including, forecasting, predicting trends, replenishing inventory are less common activities.
2. The use of sales software for data and information entry is fairly common among users but it's use for more advanced analysis is less prevalent. Some don't use the software consistently even though it's available through a company, and this can lead to inaccurate sales performance evaluations.

Key quotes:

"It wastes ~30% of my day using this software, which if we were capturing and using the information, may be worth while."

"They're starting to realize that there's a lot of opportunity there [data analytics software] and I just find that there's a lot of wasted time now going back and forth because the information that is needed for the sales associate and for the office is, it's just somewhere."

"So, we're a real old school company. We've been around seventy-five years and not much of our technology has really changed. We're running a Linux-based system. It's very simple. It's a lot of manual work. You have to go and search the information and then create your own formulas to analyze that data."



GAPS AND SHORTCOMINGS

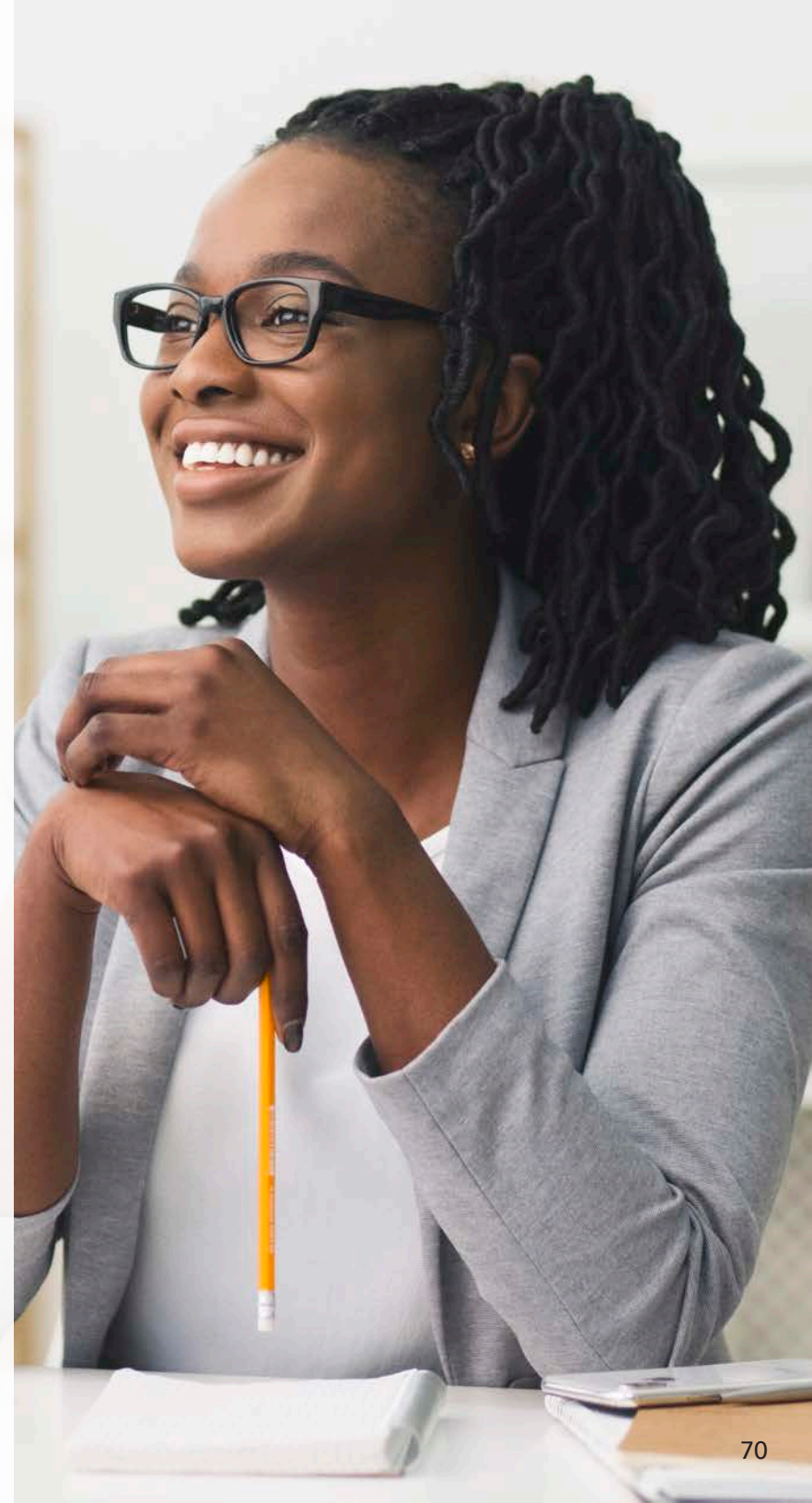
1. Shortcomings of current sales software and programs being used can include poorly configured features like email within the software, setting up task reminders, as well as limited integration capabilities with other programs used. Other issues raised revolve around sales professionals not always using the software consistently to track data in the system, and the way information is entered into systems as it is not consistent from person to person and between organizations.
2. A further challenge is that legacy software being used by some companies doesn't always integrate well with the sales software a company wants to transition to, leading to data errors and a potential loss of information.

Key quotes:

"I should be able to email it directly because I created it in this program, which has email. So why do I have to open one document, save it as a PDF to my desktop and then upload it the same way."

"It varies across account. It depends on how the account reports things. So there's no really one standard way."

"We need to be able to look at performance so that it's not just you telling us something, I should be able to monitor my statistics."



CONCERNS

1. The rise of sales software use isn't expected to threaten sales professional's jobs but there is concern that it may impact the jobs of those in administrative roles, as more and more information is stored within programs.
2. Sales professionals see a trend of allowing customers in certain industries to make purchases online, which opens more time for them to spend on the needs of larger clients. Conversely, automating the process takes away some of the personal touches that differentiate one company from others.
3. When considering the use of sales software to pad performance evaluations, concern exists around putting too much emphasis on numbers without taking into account individual salespeople and other personal variables. In some cases, data in evaluations isn't interpreted correctly as well. Proper and continuous training using these programs and analyzing the data that is generated is a must.
4. When considering barriers to implementing sales software, the financial impact is a major concern, especially for smaller companies. Some compromise and can use the free version of software, but of course that means a limited number of features are available.

Key quotes:

"I think from the company standpoint, it's gonna reduce the manpower that they need to handle those sort of lower volume customers I'll have, it frees everybody up to kind of chase after the larger orders or the bigger customers."

"I see the advantages to it [of collecting data in sales software] but for me it's just metrics for somebody else to it to look at. Let me put it this way, it doesn't reflect the current state but rather what the expected state is."

"Some people are still old school and they prefer to actually speak to a person versus, you know, going on the website, or do like an online chat or anything technology based."

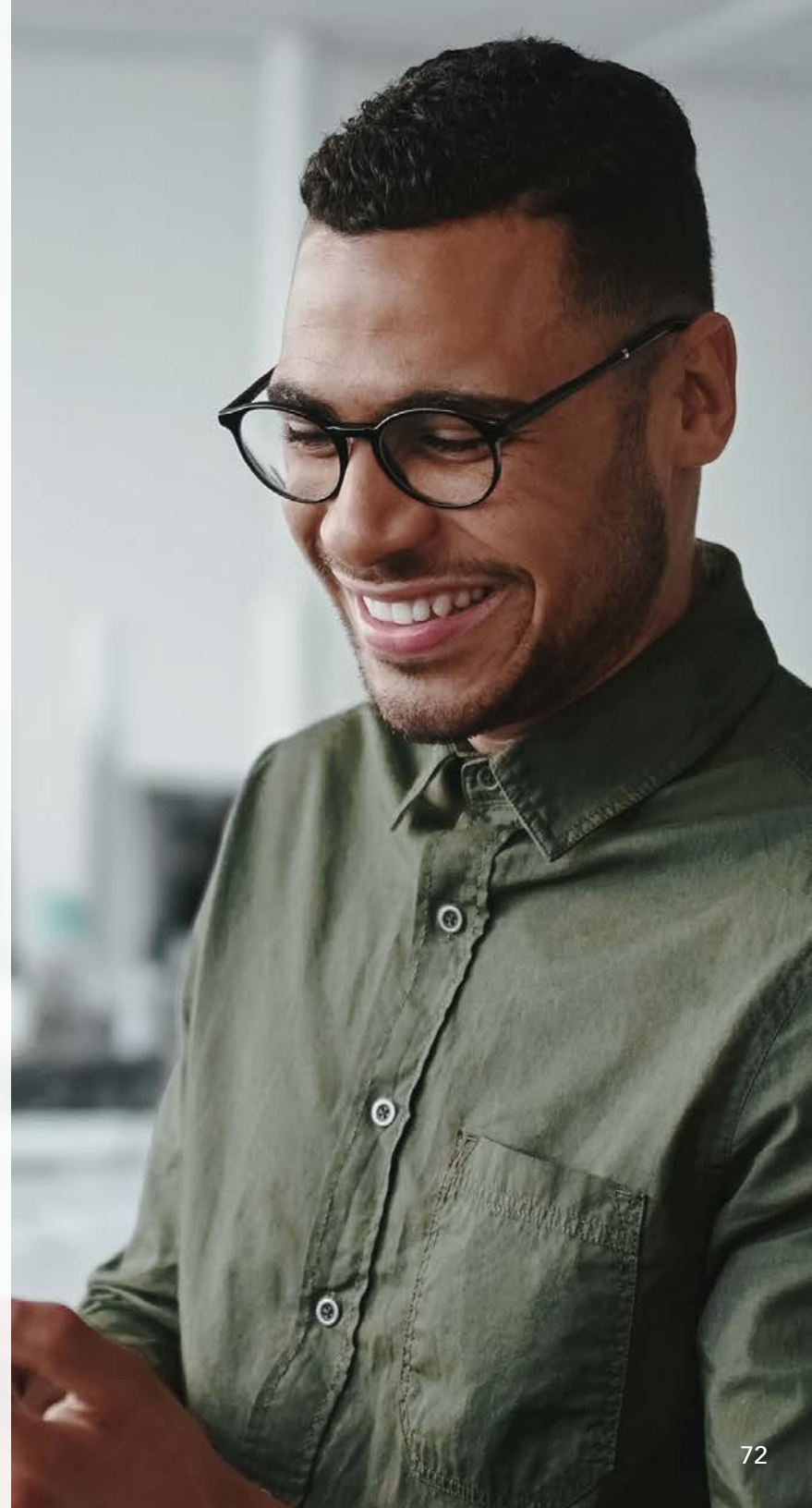
USING SOFTWARE TOOLS TO OPTIMIZE THE SALES CYCLE

1. Confidence in using sales software ranges from those that use its capabilities at a bare minimum – the amount that is necessary to do their job – to those that are willing and open to continue to learn and develop their skill set. Avid users admit that sales software makes their job easier and allow them to optimize sales performance and make informed decisions.
2. It is felt that those that don't adapt to technology and software won't succeed in the future and are expected to fall behind, while others who do will continue to learn and grow.

Key quotes:

"Technology can make that easier for someone like myself who doesn't have a ton of analytical, formulaic skills if there's a solution that can do it for me with relative ease"

"I think if you are not into implementing more analytics and technology within your company then you're going to be left behind more and more."



INTEREST IN TRAINING AND/OR DESIGNATIONS

1. Training on sales software is common when entering the sales profession and when joining a new company. Ongoing training and additional, optional training opportunities are more limited. Training offered within organizations is seen as important to learn software specifics tailored to that job or industry, and equally important is training through an independent source or vendor in order to gain more general and/or insider knowledge of that software.

Key quotes:

"I think there's lots for me to learn still, and it's been a matter of time, and I mean, there's certainly some things I'm not well-versed in or trained in either."

"My company training us on [the tool] and I feel like maybe it would have been more beneficial to have the vendor training us, just so you know, they have any specific things or things that maybe the company didn't look at. Like overall, their knowledge would be better."

"There isn't anything regimented, but there are programs to encourage employees to get professional training and development."

