Introduction

“The more things change, the more they stay the same.” That pearl of ancient wisdom is no longer true. Incremental changes steadily erode or enhance business as usual, while disruptive changes erupt like volcanoes and transfigure entire markets and industries. In the world of professional selling, Artificial Intelligence (AI) is making incremental changes now, and holds the potential to make earthshaking changes in the next decade (if not within the next five years).

CSO Insights recently reviewed more than two-dozen AI solutions that were developed specifically to address the efficiency, effectiveness, and creativity challenges that sales organizations face today. This paper discusses AI use cases that exist today, and some that are on the way, and presents a new way of thinking of the role that AI will play in sales.

First, let’s quickly define what AI is, and what it isn’t, because it goes far beyond what sales organizations have been trying to do with analytics and big data. There is specific, purpose-built AI, where you create the model, and it does the work, surfaces insights using large structured and unstructured data, and further refines its own algorithms over time. Then there is general purpose AI – still in the embryonic stage – which does everything the specific version does, and in addition creates new code by itself.
AI holds the promise of reinventing the way that sellers engage buyers, and vice versa. And that is clearly needed: Performance data from 2012 shows that on average 63% salespeople achieved their sales quotas. That number dropped to 52.8% in 2017, and the downward trend continues. Can AI help?

While global trading platforms envision a world where the need to talk to a salesperson diminishes significantly, if not disappears altogether, companies developing AI capabilities for sales organizations see sales professionals being empowered with a whole new level of knowledge and insights that set the stage for the salesperson to become more valuable than ever before to their customers.

**Moving the Needle from Tedium to Ingenuity**

Our research shows that salespeople spend a significant portion of every week on tasks other than selling. We’ll call that the tedium of sales – irksome tasks such as CRM data entry, playing phone tag to try to set up meetings, combing through social media sites looking for information about prospects and customers, and responding to requests for information from both colleagues and customers.

Then there is the ingenuity aspect of sales – applying originality, innovation, creativity, and vision to successfully meet a customer’s explicit and unrecognized needs. AI suggests a near future where tedium recedes and ingenuity rules. Two giants in the field are already working together to make this a reality.

In March of this year, IBM and Salesforce announced an alliance to partner on a new class of AI solutions. IBM CEO Ginni Rommety noted that she envisions a business world where every professional benefits from a cognitive system that augments their expertise. That change in thinking, viewing AI as Augmented Intelligence, is key. For sales teams, it means an increase in efficiency and effectiveness. For individual sellers, it offers a path to less tedium and more ingenuity.

IBM and Salesforce are not alone. CSO Insights found an additional 19 companies in the AI space that have capabilities available today that deliver real value to sales organizations. Some are well known, and several are part of a collection of new players in sales enablement who are coming into the market with revolutionary ways of solving sales challenges.

One example is in the arena of customer life cycle management. AI can take over the heavy lifting for tasks like identifying opportunities, researching prospect accounts, and developing key account plans. Salespeople will be able to follow up a complete needs analysis with a thorough solution analysis, and from there come up with the right recommendations on how to meet a client’s goals.

AI can assist sales teams in producing persona-focused proposals and ROI analyses and negotiating the deal, and help oversee the purchase approval process. After the sale, AI will monitor what happens to ensure the solution is successfully implemented and look for opportunities to keep and grow more inside those accounts.

AI will do opportunity scoring for sales teams. It will take a number of factors into consideration to do a win-probability analysis for the salesperson before they commit their time to pursue the deal. It will offer insights into what to do to move from likely-to-buy to really-likely-to-buy, and it will keep revisiting this analysis all the way through the sales process to flag threats or highlight new insights to exploit to close the deal.

In the actual selling portion of the cycle, AI eliminates the inefficiencies – and the tedium – of appointment scheduling, note taking and data entry. There is, on the market today, an AI technology that acts like a salesperson’s admin and keeps emailing prospects until it finds a time where everyone can meet, and if
rescheduling is needed it handles that task automatically as well. During the meeting, AI-based systems
go beyond just recording the conversation. They translate voice to text and time stamp the whole
meeting.

Some new features just around the corner are the ability to get real time coaching feedback, like having
the system tell the salesperson, “You've been talking for six minutes straight! Stop and ask a question.”
Or reminding them they only have five minutes left, time to close on what the next steps are. AI can also
serve up battle cards, right on the screen for the salesperson to review based on prospects mentioning a
certain competitor, bringing up a specific objection, asking for case studies that show the ROI is
achievable, etc.

AI supports managers as well, letting them access the key insights from the meetings their sales teams
members are having without needing to listen to hours of conversations. And now the complete
conversation can be attached to the CRM records, and key parts of the conversations can easily be
shared with marketing, support, product development, F&A, etc., so that the voice-of-the customer can be
leveraged by the full enterprise to increase everyone's knowledge.

As sales teams start to turn problems into solutions, AI again steps in. It first considers all the input that
was gained during the needs analysis process. As it starts to configure solutions, it takes into account all
the co-requisites and prerequisites needed to make that solution viable.

It will provide persona-based value messaging to address the concerns and objectives of the various
stakeholders who will make the decision. It will tell the salespeople how to sell value so they can avoid
discounting. It will identify other assets that the company has, besides the product they sell, that they
could bring to the table to create competitive differentiation. It will help create the ROI case to justify the
purchase, as well as an implementation plan to maximize the odds of success.

Whereas before companies might only be able to justify having a bid team for major deals, now they can
essentially have a virtual bid team for every deal. Again, we see AI reducing the tedium of gathering data,
and getting answers to questions to start to put together proposals and also increasing the ingenuity that
can be brought to bear on that process.

After the sale, AI keeps going. Companies are starting to understand that in the internet-of-things (IoT)
world, products are not just products; they are sources of information and insights. Post-sale, AI will
identify and track:

- Cases where proactive support is recommended
- Opportunities to upsell and upgrade existing clients
- Future needs that sales can start to work on now
- The actual value that products are delivering to the customer

With these insights, the paradigm shifts from customer/vendor to co-creation partners, which will have a
meaningful impact on negating competitive threats in the future.

These gains are achievable today, and as more and more players come into this space, and AI gets more
and more data from sales organizations, AI’s impact on sales efficiency and effectiveness only gets richer
and deeper over time as it improves itself.
Sales Forces Must Adapt

But all this change has other implications. Jeff Immelt, CEO of GE, spoke at the Microsoft worldwide partner conference last year on how he is transforming GE from a manufacturing company to a digital enterprise. Jeff noted that to make this a reality means that you have to “massively change your sales force.” That’s right: Changing the sales force becomes more important than ever.

In benchmarking companies with a history of sales performance improvements, we often see that they consider three factors that influence the success of salespeople and the people leading sales teams:

1. Assessment of the skills and experience a person already brings to the job, or has the aptitude and desire to learn.
2. The behavioral DNA each person is essentially hard wired with – the cornerstones of who an individual is as a person.
3. A clear understanding of the type of corporate and selling culture they best fit into.

Let’s look more closely at these last two factors.

One major impact of AI is that it shifts the sales profession to a world where there is less tedium and much more opportunity for ingenuity. But “opportunity” is a loaded word. Sales organizations need to consider both current staff and future new-hires, and identify people who can thrive in an environment that supports ingenuity. Some will be highly proficient at plowing through tedium, but less able or interested in stretching their talents in innovative directions.

Going forward, sales will need both selling competencies and new, deeper business competencies as well. It will be the combination of the two that will be required to generate out of the box thinking.

The role of sales management will go through a transformation as well. With AI providing them with metrics and insights into the status of all opportunities, managers will be in a position to more effectively coach and mentor the members of their sales teams. Managers will be needed who, rather than become fixated on the “activity” of the sales organization, focus on and promote the “creativity” of sales professionals instead.

The promise of AI lies in putting it in the hands of the right people, with the right training. To ensure we have the right people, we need to redefine the behavioral DNA that best fits with new ways of selling, we need to understand the new culture our sales teams will have to live in, and we need to expand our understanding of the skills needed to be successful and balance sales competencies with business competencies.

This reorientation can’t wait. AI will produce a tsunami in every marketplace, and failure to prepare now may leave some companies under water later.

Al Will Impact Customer Expectations

One huge unknown is the impact AI could have on buying. For example, AI could create and support “buyer insights sharing” communities where companies start to pool their information about their relationships with vendors. Potential buyers could find out what other companies have done when trying to solve a specific problem.
They could learn which vendors make the long list and short list for consideration, and why. They could see what solutions were eventually purchased, how other buyers cost justified that decision, what they actually paid, what changes to terms and conditions they were able to negotiate, how their implementation experiences compared to expectations, what ROI they really achieved, etc.

With that depth of knowledge in the hands of buyers, some sales teams will find themselves hard-pressed to remain equally well informed.

But there is also the potential for something great to come out of this. Our ultimate success is dependent not just on what we do, but on what our customers, suppliers, channel partners, and others do as well. AI sets the stage for larger-scale effectiveness to be an achievable goal, and moving to something well beyond the level of customer relationships we strive for today.

**Getting Smart About AI: Next Steps**

AI offers real opportunities to sales organizations. What is the best way to take advantage of them? You may be an early adopter who is already experimenting with new technologies, or you may work in an organization where anticipating the future is not a strong part of the culture. In any case, we recommend these steps:

- Get educated on AI – both general and specific offerings
- Consider the implications for the sales force now. How will this change who you hire, starting now? How will it change how you develop, support, compensate, etc., these people going forward?
- Consider the implications for sales management. How will this change who you put in sales leadership positions?

**About CSO Insights**

[CSO Insights](#) is the independent research arm within Miller Heiman Group™, dedicated to improving the performance and productivity of complex B2B sales. The CSO Insights team of respected analysts provides sales leaders with the research, data, expertise, and best practices required to build sustainable strategies for sales performance improvement. CSO Insights’ annual sales effectiveness studies, along with its benchmarking capabilities, are industry standards for sales leaders seeking operational and behavioral insights into how to improve their sales performance and to gain holistic assessments of their selling and sales management efficacy. Annual research studies include: *Sales Best Practices Study, Sales Performance Optimization Study*, and *Sales Enablement Optimization Study*. 