



Salesforce & The State of Sales Reports

How to Overcome Productivity & Efficiency Friction in Modern Sales Orgs



Dear Sales Leader,

In the world of sales, Salesforce has long been a leader, continually raising the bar as the best CRM available and creating invaluable insights for the industry.

Their annual State of Sales reports are essential reading for sales leaders and organizations striving for success. These reports capture the voices of sales teams everywhere, highlighting the hurdles, wins, and untapped potential of sales teams today.

At Veloxly, we're proud to be part of Salesforce's ecosystem, maintaining a 4.92-star rating on the AppExchange—a testament to our commitment to empowering sales teams like yours to thrive.

As I studied these reports over the past eight years, two themes practically shouted off the pages: **sales efficiency and productivity**.

Year after year, sales leaders shared aspirations to improve non-selling-to-selling time ratios, drive up sales rep morale, and hit their quotas, often intending to leverage new technology to do so.

However, **the data painted a different picture**: each report showed the same challenges persisting. Sales reps were bogged down by administrative tasks, morale was dropping, and KPIs weren't meeting expectations. It's clear that while the intention was there, translating it into measurable results was an ongoing struggle.

That's why we created this ebook. At Veloxly, we're passionate about not only equipping sales teams with the right technology but also about transforming the way they approach their work.

This book aims to bridge the gap between intention and execution, offering practical steps to **overcome the friction** that's holding back sales productivity and efficiency.

My goal is to empower you to break through these barriers and set a new standard for sales success. I trust this ebook provides you with actionable insights, inspiration, and perhaps a new perspective on what's possible.

If you'd like to discuss these challenges further or share your experiences, please don't hesitate to reach out. I'm always eager to talk about emerging best practices, Salesforce automation, and the future of sales enablement. Together, we can drive meaningful change in our industry.

Enjoy the read, and I look forward to connecting with you.

Samir Majumdar

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About this Report

This ebook draws primarily on data from Salesforce’s six State of Sales reports, which have documented the evolving challenges and opportunities faced by sales teams worldwide. This ebook distills recurring insights and trends, [offering actionable strategies to address persistent friction points in sales productivity and efficiency](#).

This resource is designed for sales leaders, operations, managers, and reps aiming to enhance their teams’ performance. Sales leaders will find strategies to streamline processes and boost morale, while reps and managers will discover practical tips for maximizing selling time and optimizing CRM use. Additionally, field sales professionals and Salesforce users will benefit from insights into automation, CRM efficiency, and sales enablement.

We hope this ebook serves as a valuable guide, helping you transform today’s challenges into opportunities for growth and success in modern selling environments.

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9 Year Analysis of Salesforce's State of Sales Reports

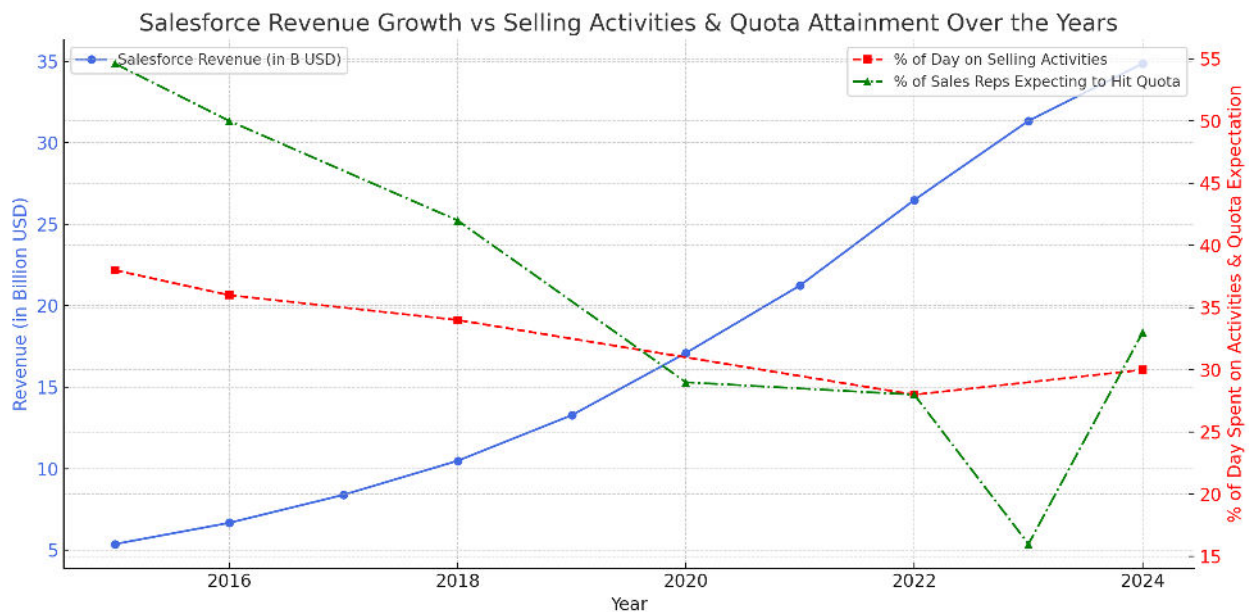
The Journey of Salesforce's State of Sales Reports

Since July 2015, Salesforce's State of Sales reports have provided valuable perspectives on the shifting landscape of sales organizations. Published intermittently over the past nine years, these reports have chronicled changes in sales tactics, technology adoption, and team performance, offering a comprehensive view of the evolving challenges sales teams face. The purpose of these reports has always been to help organizations identify growth opportunities, address barriers, and refine strategies. It's a must read for me every year.

Paradox of Salesforce's Revenue Growth vs. User Challenges

While Salesforce has experienced consistent year-over-year growth—reaching over \$34 billion in 2024—sales teams using the platform, as well as other CRMs like Zoho and HubSpot, continue to face significant challenges. Reps are spending more time on non-selling tasks, dealing with tech stack complexity, and grappling with persistent data quality issues. **This creates a paradox:** although Salesforce, Zoho, HubSpot, and other CRMs have achieved commercial success, their growth doesn't necessarily translate to better sales outcomes for users. This is what drove us to start Veloxy.

Salesforce's Revenue Growth Juxtaposed with Stagnant Selling Activity and Quota Attainment



Purpose of This Report

This report aims to provide a nine-year analysis of the State of Sales findings, shedding light on the consistent trends, challenges, and potential solutions for sales teams. By examining these long-standing issues through data-driven insights, we can better understand why sales performance has lagged despite technological advancements. More importantly, this report will highlight how integrated solutions such as Salesforce automation tools address these persistent challenges, offering a pathway for sales teams to maximize CRM potential, reduce inefficiencies, and enhance sales productivity.

Salesforce's State of Sales Covers from 2015 to 2024



Salesforce Revenue Trends

Salesforce's Consistent Growth Story (2015–2024)

Salesforce has consistently outperformed expectations over the past nine years, becoming one of the most successful CRM solutions in the market. From generating \$5.37 billion in revenue in 2015 to reaching \$34.86 billion in 2024, its growth has been marked by continuous innovation, expanded features, and strong global adoption. This trajectory underscores Salesforce's position as a leader in the CRM space, adapting to the evolving needs of sales teams across industries, while reflecting a broader trend of CRM growth among platforms like Zoho and HubSpot.

The Disconnect: User Productivity vs. Revenue Growth

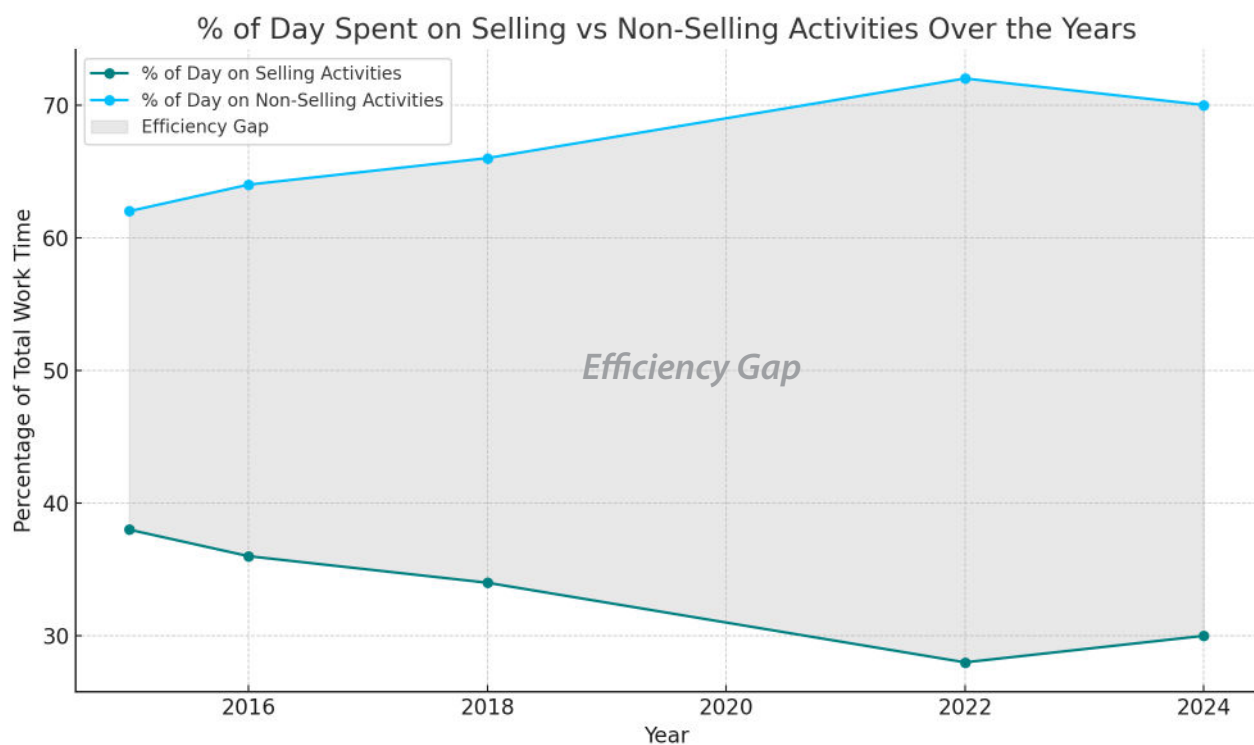
However, a deeper look into the State of Sales reports reveals a paradox: while Salesforce's financial success is evident, many users have struggled to translate CRM adoption into consistent sales productivity or revenue growth (a huge problem).

This trend is not unique to Salesforce but extends to other CRMs like Zoho and HubSpot as well. Key data points reflect this trend:

- **2018 (3rd Edition):** 66% of sales reps' time was consumed by non-selling activities, leaving only 34% for direct selling efforts.
- **2022 (5th Edition):** The time spent on non-selling activities increased to 72%, reducing selling time to 28%. Sales reps cited challenges such as CRM complexity, manual data entry, and redundant workflows.
- **2024 (6th Edition):** Despite a slight improvement, 70% of reps' time was still devoted to non-selling tasks, highlighting persistent inefficiencies. This indicates that the benefits of CRM innovations haven't fully translated into improved daily workflows for sales teams.

This disconnect between CRM growth and users' day-to-day experiences reveals that while Salesforce and other CRMs are powerful tools, they often require complementary solutions to maximize their potential. Notably, Salesforce's ecosystem includes over 5,000 AppExchange apps designed to enhance CRM functionality and user outcomes, not to mention the 1,000+ Salesforce consulting companies.

The Sales Efficiency Gap between Non-Selling Activities and Selling Activities



Challenges Behind the Paradox

Several underlying issues contribute to this disconnect:

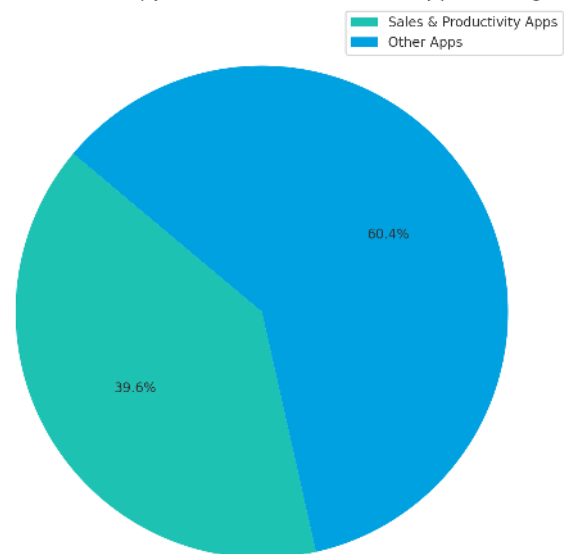
- **Complex Tech Stacks:** Sales teams often juggle an average of 10 tools just to close deals, leading to inefficiencies and lost selling time (their overall stack is much larger).
- **Manual Data Entry:** Despite CRM automation capabilities, 58% of reps thinks (reported in the third edition) that CRM usage felt like busy work. Even in 2024, over half of sales teams still struggle with data accuracy and incomplete customer records, hindering effective sales outreach.
- **Low CRM Utilization:** Across multiple editions, less than 50% of sales teams believe they're fully utilizing their CRM's capabilities. This suggests a lack of integration with broader sales processes, preventing reps from maximizing the value of CRMs like Salesforce.

Solutions: Unlocking CRM Potential with Complementary Apps

To truly maximize the potential of CRMs like Salesforce, sales teams need complementary tools that address these core challenges:

- **Sales Productivity Apps:** These apps simplify workflows, streamline processes, and reduce tech stack complexity, enabling reps to focus more on selling.
- **Lead and Opportunity Management Apps:** By automating data entry, ensuring data accuracy, and synchronizing records, these apps save time and minimize errors, enhancing the effectiveness of CRM adoption.
- **Email and Calendar Sync Apps:** These integrations improve CRM adoption by ensuring seamless communication, timely follow-ups, data accuracy, and better organization of sales activities.

Distribution of Applications on Salesforce AppExchange



It's not a coincidence that such a large portion—39.6%—of the AppExchange market is dedicated to sales and productivity. When you consider there are over 5,000 apps available on Salesforce's AppExchange, the tools that enhance CRM functionality, simplify user experiences, and drive productivity gains become a must-have, not a nice-to-have.

Bridging the Gap with AppExchange Solutions

While Salesforce's growth story is impressive, its true potential can only be realized when paired with effective, complementary solutions. Salesforce automation tools and AppExchange integrations play a crucial role in transforming CRM investments into tangible productivity gains. By addressing the disconnect between CRM capabilities and user productivity, sales teams can achieve more consistent revenue growth and higher quota attainment.

Questions for You to Consider

- Is your current CRM truly aligned with your sales team's needs, or are they adding more complexity?
- How much time do your reps spend on non-selling tasks, and what impact does this have on your sales outcomes?
- What would your team achieve if they had 10% more selling time each week? How would that translate to revenue?

Samir's Urgent Recommendations

- **Evaluate Your Current CRM Integration:** Assess whether your CRM workflows are fully integrated or if there are gaps that are slowing down sales efforts.
- **Explore Complementary Solutions:** Start identifying which AppExchange apps or productivity tools could streamline workflows, automate manual tasks, and improve CRM utilization.
- **Prioritize Training and Adoption:** Ensure your team has the training they need to fully leverage your CRM and integrated apps, boosting both productivity and engagement.



Let's Discuss Your CRM Strategy

Ready to transform your CRM into a true productivity and revenue driver? Let's have a conversation.

[Get on My Calendar](#)

Non-Selling Activities vs. Selling Activities

Time Drain: Non-Selling Activities Dominate Reps' Schedules

A recurring theme across all State of Sales reports is the overwhelming amount of time sales reps spend on non-selling activities. While sales tools and processes have evolved over the past nine years, the proportion of time spent on non-revenue-generating tasks has remained stubbornly high, significantly impacting sales productivity.

Let's break down this persistent trend:

- **2015 (1st Edition):** 64% of sales reps' time was devoted to non-selling activities, underscoring the need for streamlined processes.
- **2018 (3rd Edition):** Minimal improvement was observed, with 66% of time still spent on tasks such as administrative duties, lead prioritization, and internal meetings.
- **2022 (5th Edition):** The problem intensified, with non-selling activities consuming 72% of reps' time, leaving only 28% for actual selling.
- **2024 (6th Edition):** While there was a slight decrease, 70% of reps' time remained allocated to non-selling work, indicating that deeper, systemic changes are needed to achieve meaningful results.

The Overwhelming Complexity of Sales Tech Stacks

The overwhelming number of sales solutions adds to the inefficiencies sales teams face, increasing the time spent on non-selling activities. Here's how this growing complexity impacts productivity:

- **1,200+ Sales Solutions:** Sales leaders have a surplus of tools to choose from, creating a crowded landscape of options.
- **25% of Budgets Allocated to Tools:** A significant portion of sales budgets is dedicated to purchasing and maintaining sales tools and technologies.
- **27 Tools per Tech Stack:** The average sales tech stack is too big, highlighting potential sales enablement inefficiencies from juggling too many platforms.
- **Cost per Employee:** Sales teams invest between [\\$3,100 to \\$5,200](#) per employee annually in tech tools, adding pressure to ensure these tools deliver ROI.



Watch this [insightful webinar by SBI Growth](#) on the 5 reasons your Sales Tech Stack isn't delivering and what to do about it.

Why Non-Selling Activities Persist

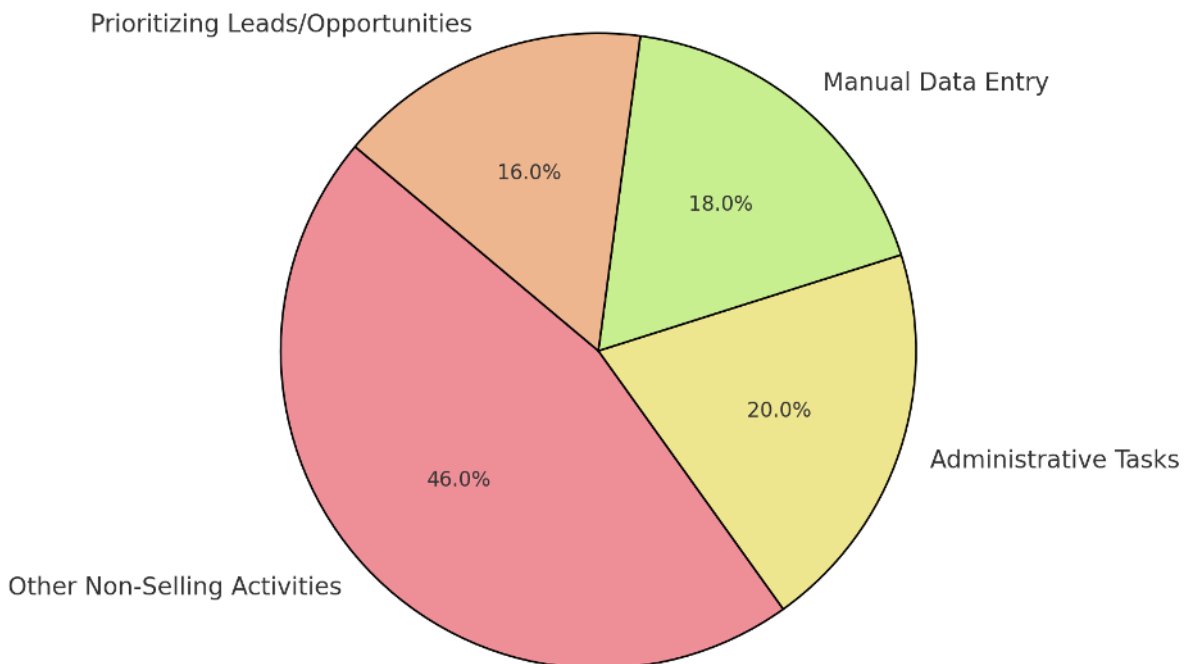
Despite innovations in CRM and other sales technology, the core reasons behind the persistence of non-selling activities remain largely unchanged:

- **Administrative Tasks:** Reps still spend a substantial amount of time on manual data entry, reporting, and CRM updates.
- **Lead Prioritization:** While AI tools have improved lead scoring, many teams lack integrated systems that offer seamless prioritization of leads.
- **Internal Meetings and Coordination:** Sales teams often engage in excessive meetings, many of which don't directly contribute to closing deals.
- **Proposal and Quote Generation:** The process of creating customized quotes and proposals is often manual and time-consuming.
- **Poor Sales Technology Adoption:** Reps either don't have the time to learn, aren't provided with adequate training, or are resistant to change, limiting their adoption of new tools and processes.

The impact is clear: less time for direct selling leads to missed opportunities, lower conversion rates, and decreased morale among sales teams.

Non-Selling Activities by Percentage, Highlighting the Most Time-Consuming Tasks.

Breakdown of Specific Non-Selling Activities by Percentage



The Broader Implications of High Non-Selling Time

This persistent issue affects not only individual reps but also the overall performance of sales teams:

- **Quota Attainment:** Across all six reports, the low percentage of time spent selling correlates with frequent quota misses. In 2024, 67% of sales reps didn't expect to meet their quota, reflecting the broader impact of inefficient time management.
- **Revenue Consistency:** Teams that spend over 60% of their time on non-selling tasks struggle with consistent revenue generation, as they can't maintain a full pipeline of opportunities.
- **Rep Turnover:** Reps who feel burdened by administrative tasks often experience burnout, leading to higher turnover rates—another persistent theme across editions.

How Automation & AI Sales Apps Reduce Non-Selling Time

Salesforce Automation apps, AI Sales Assistant apps, and other sales productivity tools can play a crucial role in reducing non-selling time and increasing sales efficiency. Here's how:

- **Automated Data Entry and CRM Updates:** AI-powered tools eliminate manual data entry, ensuring reps can focus more on selling.
- **Integrated Lead Prioritization:** AI-driven predictive analytics offer real-time, prioritized lead recommendations within the CRM, streamlining the lead-scoring process.
- **Proposal Automation:** Automated workflows and templates for quotes and proposals significantly reduce the time spent on these tasks.
- **Enhanced Communication Tools:** Internal communication features consolidate meeting schedules, enabling more efficient coordination and fewer unnecessary meetings.

From Burden to Opportunity

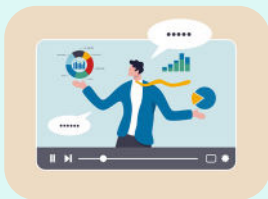
The solution to reducing non-selling activities is not simply more technology—it's smarter, integrated solutions that address the root causes of inefficiency. Salesforce Automation apps, AI Sales Assistants, and related tools offer sales teams a way to reclaim valuable selling time, drive better quota attainment, and achieve more consistent revenue growth. By transforming administrative burdens into streamlined workflows, these tools help reps become more effective and productive.

Questions for You to Consider

- How much of your sales team's day is currently spent on non-selling tasks? What would happen if this time was reduced by even 10%?
- Are your current sales tools helping or hindering your team's selling time? What are the biggest barriers to adoption?
- How well integrated are your sales tools? Could seamless automation free up time for more direct selling activities?

Samir's Urgent Recommendations

- **Assess Your Team's Time Allocation:** Review how much time reps spend on selling versus non-selling tasks, and identify the most time-consuming administrative activities.
- **Prioritize Automation Tools:** Identify key areas where automation could have the biggest impact, such as data entry, lead prioritization, and proposal generation.
- **Invest in AI Sales Assistants:** AI tools that provide predictive analytics, real-time insights, and streamlined processes can significantly boost selling time and overall productivity.



Let's Discuss How to Increase Selling Time

Ready to explore practical solutions that reduce non-selling activities and boost sales productivity? Let's talk.

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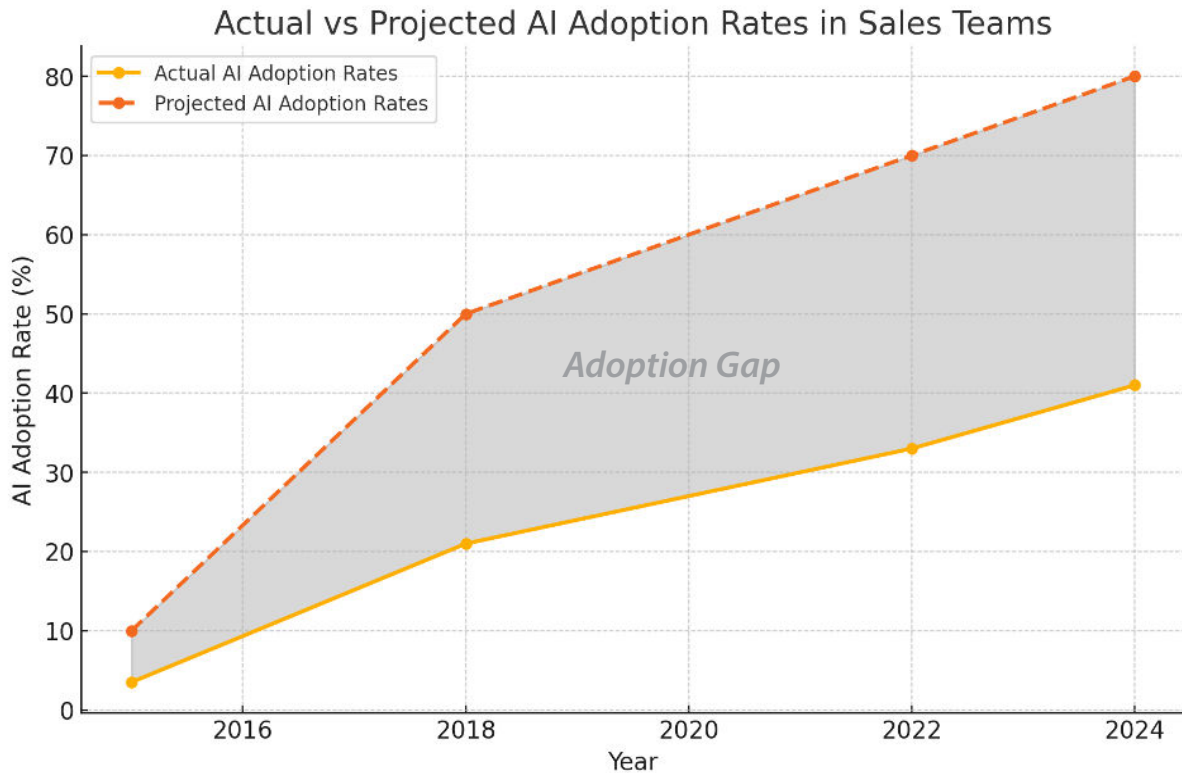
The Evolution of AI in Sales: From Promise to Reality

Over the past nine years, the State of Sales reports have consistently highlighted AI's transformative potential. Yet, the implementation and adoption of AI have shown fluctuating results. Let's review the statistics that set the context:

- **2015 (1st Edition):** High-performing teams were 4x more likely to use predictive analytics, an early form of AI, emphasizing intelligent forecasting and opportunity management.
- **2018 (3rd Edition):** 66% of sales reps believed AI could significantly impact their roles within five years, focusing on improved data quality and guided selling. However, only 21% of organizations had adopted AI, citing budget limitations and inadequate training.
- **2022 (5th Edition):** AI adoption rose to 33%, with 40% of users reporting a major improvement in forecasting, time management, and lead prioritization. Despite this, over 50% of users saw a moderate or minor improvement across all capabilities.

- **2024 (6th Edition):** AI adoption reached 41%, with noted benefits like enhanced personalization and data quality. However, trust in AI remained a challenge, with only 35% of reps fully trusting AI-generated insights, and 49% feeling uncertain about generative AI's ethical use.

Sales Teams are Falling Behind on their Sales AI Adoption Roadmap



Discrepancies Between AI's Promises and Practical Gains

While AI has proven benefits, gaps still exist between its theoretical potential and real-world outcomes. Let's explore these in a mix of paragraphs and key bullet points:

- **Data Quality and Accuracy:** AI is designed to improve data accuracy, yet many users continue to report issues with incomplete or outdated information. This hinders personalization and trust in AI-generated insights.
 - **Only 35%** of sales reps in the 6th edition fully trust their organization's data, illustrating a persistent challenge with AI's data reliability.
- **Lead Prioritization:** Although AI enhances lead scoring, many teams struggle with full CRM integration, resulting in inconsistent prioritization.
 - This inconsistency forces reps to rely on instinct, which undermines AI's promise of data-driven decision-making.

- **Personalization Efforts:** AI-driven personalization shows potential, but 59% of business buyers in the 6th edition reported that reps still fail to understand their goals, suggesting that AI's insights are not translating into meaningful customer interactions.

The potential of AI in sales lies in bridging these gaps. Sales teams need AI solutions that not only generate accurate insights but also integrate seamlessly with existing processes. By doing so, AI can build trust, drive data accuracy, and foster more personalized interactions, turning theoretical benefits into practical results.

Challenges Slowing Down AI Adoption

While AI has significant potential to enhance sales outcomes, several barriers have slowed down its adoption:

- **Trust and Transparency:** AI tools are often perceived as “black boxes,” creating uncertainty among reps. Without clear explanations of how AI decisions are made, adoption rates decline.
 - Sales reps and leaders alike need transparent AI solutions that provide understandable insights.
- **Budget Constraints:** Implementing AI solutions often requires significant upfront investment. While AI promises a strong ROI, many sales teams struggle with initial costs and scalability.
 - Organizations must look for scalable AI solutions that fit within budgetary constraints and can grow with sales teams.
- **Training and Implementation Gaps:** Even when AI tools are introduced, inadequate training hinders effective adoption. Only 47% of sales teams in the 6th edition have implemented AI-based coaching or task reminders, indicating a need for better onboarding.
 - Training programs must prioritize hands-on experience to bridge the knowledge gap and ensure successful AI integration.

Overcoming adoption barriers requires an approach focused on transparent AI processes, budget-friendly solutions, and targeted training. By addressing these challenges, sales teams can unlock AI's potential for increased productivity and more reliable results.



Sauvik Sarkar
CTO

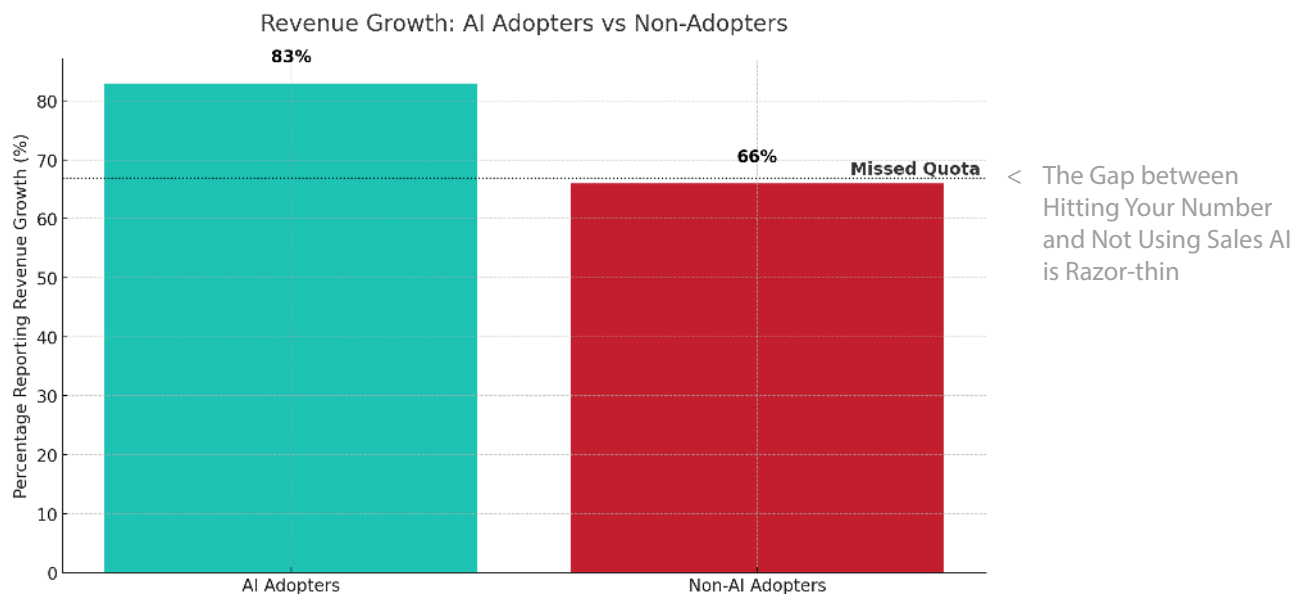
“AI's potential is immense, but only when it's trusted, integrated, and drives real results. The time to fully harness AI in sales is now.”

Proven Impact of AI on Revenue Growth

Despite challenges, AI has demonstrated measurable revenue impact for teams that effectively integrate it:

- **Increased Revenue for AI Adopters:** In the 6th edition, 83% of AI adopters reported revenue growth, compared to 66% of teams without AI, highlighting its potential for boosting sales performance.
- **Improved Sales Forecasting:** AI-enabled forecasting consistently ranks among the top benefits, with 84% of AI users in the 5th edition reporting a moderate to major improvement in forecasting accuracy.
- **Enhanced Personalization:** AI-driven personalization has been linked to higher conversion rates, enabling reps to tailor interactions based on real-time data insights.

AI's positive impact on revenue growth is clear among teams that have integrated it effectively. Increased forecasting accuracy, higher conversion rates, and improved personalization all point to AI's potential as a driver of sales success. Sales teams that align their strategies with proven AI use cases are better positioned to achieve sustained growth and productivity gains.



Best Practices for Ethical and Effective AI Adoption

To bridge the gap between AI's potential and its real-world application, sales teams should follow best practices that emphasize ethical use and practical implementation:

- **Clear and Transparent AI Processes:** Leading AI platforms should provide explanations for how AI recommendations are generated, helping reps build trust and understanding.

- **Secure Data Handling:** Prioritize AI tools that maintain robust data protection policies, ensuring compliance with legal standards and addressing customer concerns about data privacy.
- **Budget-Friendly Implementation:** Look for AI solutions that offer scalable pricing models, enabling both small and large sales teams to adopt AI without heavy initial costs.
- **Comprehensive Training and Support:** Effective AI adoption requires tailored training programs that equip sales teams to maximize AI's potential while maintaining ethical use.

Implementing AI effectively involves more than just technology—it requires fostering a culture of transparency, data security, and ongoing support. By adhering to these best practices, sales teams can drive consistent performance improvements and build trust among reps and customers alike.

Unlocking AI's Revenue Potential

AI's potential for transforming sales is clear, but realizing this potential requires an approach that combines transparency, budget-friendly solutions, and comprehensive training. By adhering to these principles, sales teams can leverage AI to drive consistent revenue growth, improve customer relationships, and increase productivity.

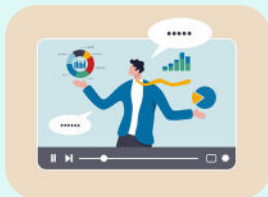
Questions for You to Consider

- What challenges have you faced in getting sales reps to trust and fully utilize AI tools?
- How could better transparency and data accuracy influence your team's adoption of AI and overall sales performance?
- What are the biggest hurdles in aligning AI capabilities with your team's budget constraints?
- In what areas of your sales process do you believe AI could make the most immediate impact?

Samir's Urgent Recommendations

- **Prioritize Transparent AI Solutions:** Choose AI tools that provide clear, understandable outputs to build trust among sales reps and enhance decision-making accuracy.
- **Focus on Scalable AI:** Start with budget-friendly AI tools that offer high ROI, allowing you to gradually scale as your team sees results and gains confidence in AI's capabilities.
- **Invest in Targeted Training:** Implement training that helps your team use AI tools effectively, addressing onboarding and ongoing skill development to maximize productivity.

- **Enhance Data Accuracy:** Regularly review AI-generated data to ensure it remains complete, accurate, and actionable, helping your team personalize interactions.
- **Align AI with Real-World Use Cases:** Identify sales processes where AI can make the most impact—such as lead prioritization, forecasting, or personalization—and deploy AI solutions that address these areas directly.



Let's Achieve AI-Driven Sales Success

Sales AI can transform your sales outcomes. Let's explore how AI can drive growth and elevate your performance.

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Growth Expectations vs. Actual Quota Attainment

Rising Confidence, Missing Quotas and Growth Expectations

Over the past nine years, the State of Sales reports have consistently shown that sales teams maintain high levels of confidence in their growth strategies. However, this optimism doesn't always translate into achieving sales quotas. While sales leaders are confident in their 12-month growth strategies, reps often face persistent challenges in meeting quotas, indicating a disconnect between expectations and execution.

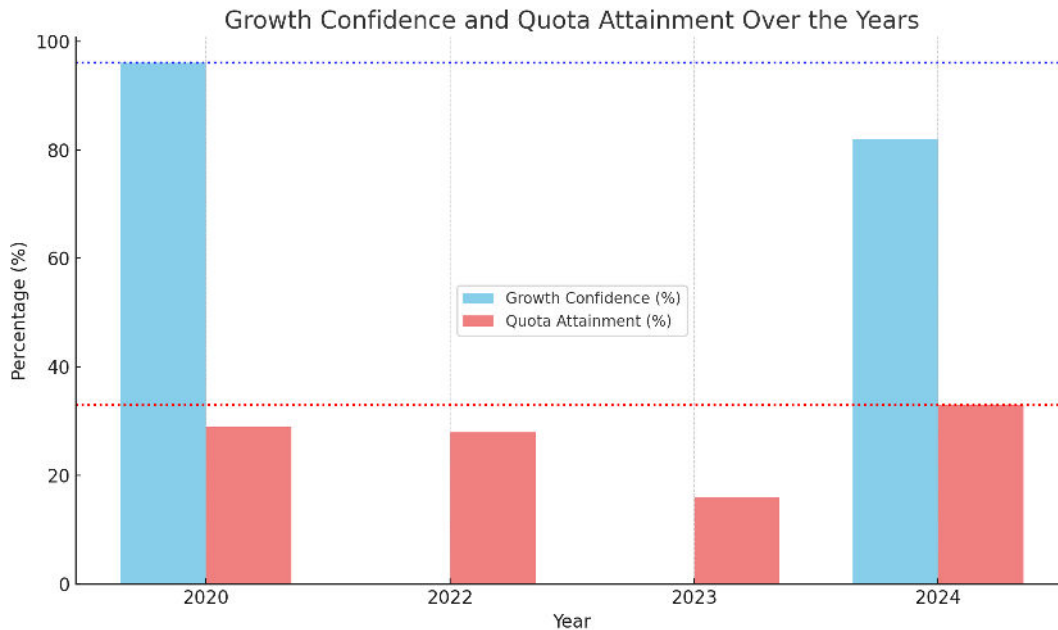
- **2020 (4th Edition):** An overwhelming 96% of sales leaders communicated confidence in the company's growth strategy for the next 12 months, ranging from completely confident to slightly confident. However, this high level of optimism did not necessarily correspond with higher rates of quota attainment, as teams struggled with the practical execution of their strategies to the tune of 72% missing quota in 2022, 1% worse than in 2020.
- **2024 (6th Edition):** Despite 82% of sales reps expressing confidence in their growth plans, 67% did not expect to meet their quotas, and 84% missed their quota the previous year. The primary barriers cited were time spent on non-selling tasks, inadequate tools, and ineffective data management.



Frank Ortiz
Outside Sales Director

"When 70% of a rep's day is spent on non-selling tasks, it's time for a change. The faster we streamlined Salesforce, the sooner we saw real growth."

Stark Drop in Confidence with a Slight Jump in Quota Attainment



Why Sales Teams Continue to Struggle with Quota Attainment

The disconnect between growth expectations and actual quota attainment persists for several reasons:

- **Time Allocation:** High levels of non-selling activities consistently limit the time available for direct selling, reducing reps' ability to build and close deals.
- **Ineffective Enablement:** While enablement resources have improved, they often lack the depth needed to translate training into quota attainment. This results in limited practical impact, as seen in both the 5th and 6th editions.
- **Data and Technology Challenges:** Issues with CRM adoption, manual data entry, and unreliable insights prevent reps from achieving the efficiency needed to meet quotas.

The Broader Implications of Missing Quotas

Consistently missing quotas has far-reaching effects beyond individual performance:

- **Revenue Inconsistency:** Companies that fail to meet quotas regularly struggle with revenue predictability, which affects broader business planning and strategy.
- **Rep Turnover:** Reps who consistently miss quotas are more likely to feel demotivated, increasing the risk of turnover.
- **Customer Relationships:** Lower quota attainment often results in missed customer engagement opportunities, leading to weaker relationships and fewer upsell/cross-sell opportunities.



Watch this [insightful webinar on Predictably Hitting Quota](#) with Rick Janezic of Strike Zone Sales Systems & Jeff Grice of Veloxly.

Finding the Right Technology to Drive Quota Attainment

To consistently meet growth goals, sales teams must focus on adopting the right sales technology—tools that not only enable reps to hit quotas but also encourage adoption, which remains a significant challenge given the high non-selling activity rates.

Here's what to look for in a sales solution:

- **Simplified User Experience:** Tools should have intuitive interfaces that encourage reps to engage with them regularly, reducing resistance and fostering adoption.
- **Automated Processes:** Look for solutions that automate manual tasks like data entry, CRM updates, and lead scoring to free up time for selling activities.
- **Actionable Insights:** AI-powered analytics should provide clear, up-to-date insights that reps can use to prioritize opportunities and engage more effectively.
- **Real-Time Support:** Sales tech should offer real-time selling guidance, automated follow-ups, and personalized action plans to enhance productivity.

Turning Growth Confidence into Results

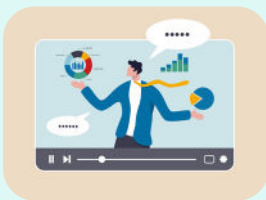
Confidence alone isn't enough to drive growth. Sales teams need actionable, user-friendly tools that address the underlying issues preventing quota attainment. By implementing solutions that enhance productivity, streamline workflows, and encourage adoption, sales teams can consistently turn growth strategies into concrete results.

Questions for You to Consider

- How well does your team's confidence in growth plans translate to actual quota attainment? Where are the gaps?
- Are your reps equipped with the right tools and training to capitalize on growth strategies effectively?
- What barriers have you identified that prevent consistent quota attainment, despite confident growth projections?

Samir's Urgent Recommendations

- **Connect Confidence with Execution:** Build a bridge between strategic confidence and operational results by ensuring your reps have access to actionable insights and real-time guidance.
- **Address Barriers Head-On:** Identify the biggest roadblocks to hitting quotas—whether they involve time management, training gaps, or inadequate tools—and address them promptly.
- **Focus on Adaptable Growth Strategies:** Choose sales solutions that adapt quickly to your evolving growth strategies, helping you maintain momentum even in changing market conditions.



Let's Turn Confidence into Consistent Results

Ready to translate growth optimism into quota achievement? Let's identify tailored solutions to make your confidence count.

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Persistent Gap in Delivering Personalization and Trusted Advice

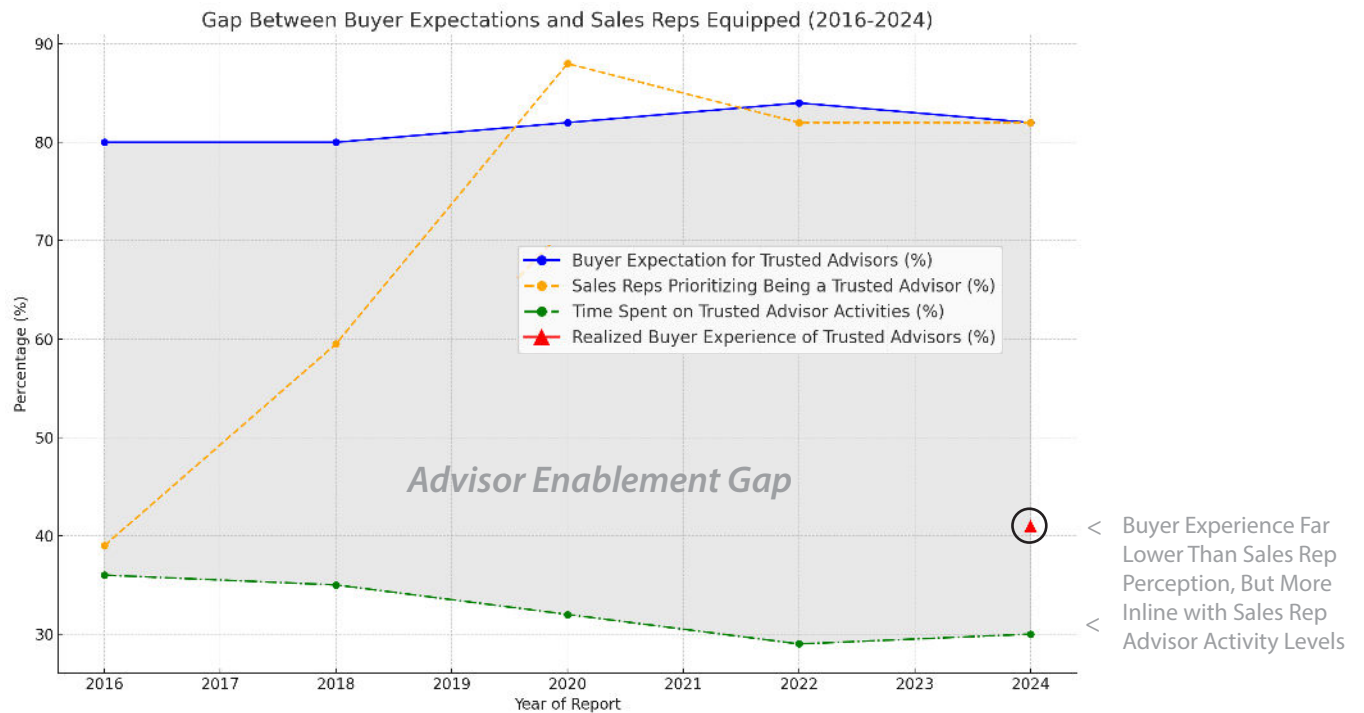
The Need for Trusted Advisors: An Unmet Expectation

For nearly a decade, the State of Sales reports have emphasized that buyers are not just looking for sales reps—they want trusted advisors who understand their business goals and add value beyond the product. However, despite this recurring theme, sales reps continue to struggle with delivering personalized, trust-based interactions.

- **2016 (2nd Edition):** 79% of business buyers indicated that it was critical or very important to interact with salespeople who act as trusted advisors. However, only 39% of sales teams ranked “becoming a trusted advisor to customers” as a top objective for the next 12-18 months, revealing a significant gap in priorities. Additionally, only 63% of sales teams reported alignment with changing customer expectations, further underscoring the need for sales teams to prioritize building trust-based relationships
- **2018 (3rd Edition):** This trend continued, with 78% of buyers emphasizing the importance of trusted advisor qualities in sales reps. However, discovering a customer's needs and researching a customer's current solution were two of the top five things reps say they spend too little time on, indicating a widening gap between buyer needs and sales enablement resources.

- **2022 (5th Edition):** 87% of business buyers expressed a preference for sales reps who act as trusted advisors. Meanwhile, 82% of sales reps reported that their company enables them to act in this role.
- **2024 (6th Edition):** Despite technological advancements, 59% of business buyers still felt most sales reps didn't take the time to understand their goals. Additionally, 86% of buyers reported they were more likely to buy when reps demonstrated an understanding of their objectives, underscoring a persistent need for trust-based, personalized selling.

The Striking Difference Between Buyer Expectations, Buyer Perceptions, and Seller Activities



The Challenges in Delivering Personalization and Trust

The gap between buyer expectations and sales reps' capabilities persists due to several factors:

- **Incomplete Buyer Insights:** Reps often lack timely, accurate data about customer needs and business goals, limiting their ability to tailor sales pitches effectively.
- **Limited AI Integration:** While AI has been promoted as a tool to improve personalization, many sales teams have struggled to fully implement AI-driven insights into their selling strategies.
- **Inadequate Training:** Despite the focus on enablement, reps often receive generic training that doesn't adequately prepare them to act as trusted advisors or deliver personalized experiences.

These challenges not only affect sales outcomes but also impact buyer trust and engagement, making it harder for sales teams to foster long-term relationships.



Quickly improve 15 Sales Performance KPIs—including customer experience—by [reading my 7 Sales Secrets Book](#).

The Broader Implications of Failing to Deliver Personalization

Failing to deliver personalized experiences has several negative impacts on sales teams:

- **Lower Conversion Rates:** When reps fail to align their messaging with buyer goals, conversion rates suffer. This is evident across all editions of the State of Sales reports, where teams with low personalization levels consistently report lower close rates.
- **Weaker Customer Relationships:** Without personalization, customer relationships often remain transactional, leading to fewer repeat sales and lower customer lifetime value, not to mention poor CRM records.
- **Reduced Competitive Advantage:** In an increasingly competitive market, sales teams that don't deliver personalization risk falling behind competitors who have mastered this approach.

Finding the Solution for Personalized, Trust-Based Selling

Sales teams need tools that deliver comprehensive sales intelligence and foster trust-based selling. The ideal solutions should offer:

- **Comprehensive Buyer Insights:** Effective tools should consolidate buyer data from multiple sources, providing a clear understanding of customer goals and needs, enabling reps to deliver more tailored sales pitches that resonate with buyers.
- **AI-Driven Personalization:** Sales AI tools can analyze customer interactions and preferences, offering real-time suggestions for personalized messaging and next steps, which aids in building trust-based relationships.
- **Targeted Training and Support:** Sales strategies should prioritize value-based client interactions over forceful transactions, offering enablement resources that focus on personalized selling strategies to enhance reps' skill sets.

Bridging the Personalization Gap with AI Solutions

To truly meet the evolving expectations of today's buyers, sales teams need tools that turn insights into action. Sales AI and automation tools enable reps to deliver personalized, goal-aligned support that drives both conversions and long-term customer relationships.

Questions for You to Consider

- Are your sales reps equipped with the right tools and insights to act as trusted advisors, or are they primarily focused on product features?
- How often do your reps personalize interactions based on individual buyer goals, and how do they currently gather those insights?
- How does your team handle feedback from buyers who desire more value-based interactions rather than transactional exchanges?

Samir's Urgent Recommendations

- **Invest in Comprehensive Buyer Insights:** Prioritize tools that centralize customer data from multiple sources, ensuring your reps have access to timely, accurate, and complete information about customer goals.
- **Enhance AI-Driven Personalization:** Implement AI tools that offer real-time, personalized messaging suggestions, allowing reps to tailor their interactions and build stronger trust.
- **Deliver Strategic, Targeted Training:** Prioritize enablement resources that emphasize strategic selling approaches, guiding your reps to become trusted advisors. Equip them with the skills to engage in value-driven conversations that align with buyer goals, fostering deeper connections and more meaningful outcomes.



Let's Turn Strategy into Trust-Building Success

Would you like to explore how your sales team can deliver more personalized, trust-based interactions?

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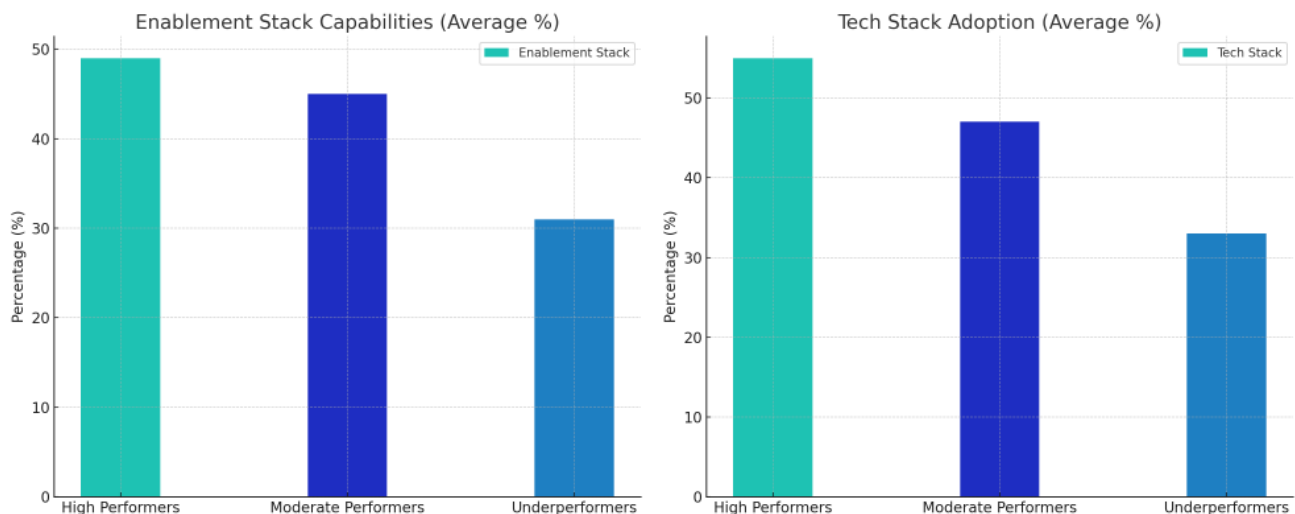
Sales Enablement, Data Quality, and Technology

Technology's Role in Sales Enablement: Overcoming Long-Standing Challenges

Over the past nine years, State of Sales reports have underscored the importance of integrating technology into sales enablement strategies. Despite advances in tools and training, the effectiveness of enablement initiatives has been limited by issues like data quality, ineffective tech stacks, and inconsistent integration. This has created a persistent gap between enablement efforts and actual sales outcomes.

- **2015 (1st Edition):** High-performing sales teams were 3.5 times more likely than underperformers to leverage sales analytics, marking a trend toward data-driven decision-making. However, the majority of sales teams still struggled to fully integrate data insights into daily sales activities, indicating early challenges in aligning technology with enablement goals.
- **2016 (2nd Edition):** Sales teams faced challenges with inefficient internal processes, with 45% of teams citing excessive administrative tasks as a top reason for productivity losses. This highlighted the need for streamlined processes and better use of technology to reduce non-selling time and improve overall efficiency
- **2018 (3rd Edition):** Sales reps increased their time spent connecting with customers virtually at a rate three times greater than in-person meetings. This shift highlights the need for technology that supports efficient remote selling, ensuring reps can engage customers effectively in a digital-first world.
- **2020 (4th Edition):** 85% of sales professionals agreed that sales operations were becoming increasingly strategic, highlighting the growing importance of technology and data management in modern sales enablement. This shift reflects the need for efficient processes to address challenges in data quality and integration, aiming to bridge the gap between enablement efforts and actual sales outcomes.

Sales Enablement and Tech Stack Adoption Rates amongst varying Sales Performance Levels



Persistent Gaps in Enablement, Data Quality, and Integration

Despite improvements in enablement, several core issues persist:

- **Data Quality and Accuracy:** Reps continue to report incomplete or inaccurate data, limiting the effectiveness of CRM insights and making it harder to personalize customer interactions.
- **Complex Tech Stacks:** The average sales team uses 10 tools just to close deals, creating tech friction and low CRM adoption rates.

- **Limited Real-Time Support:** While AI has enhanced enablement with real-time guidance, many sales teams lack consistent access to personalized support that drives immediate results.

These gaps reveal that while enablement efforts have advanced, true effectiveness requires a more holistic approach that combines data accuracy, seamless integration, and real-time AI support.

The Shift to Virtual/Hybrid Selling Models

The need for better integration is especially evident as sales teams adapt to virtual and hybrid selling environments—a recurring growth tactic in State of Sales reports:

- **2018 (3rd Edition):** Sales reps reported a 3x increase in time spent connecting with customers virtually compared to in-person meetings. This shift underscores the growing importance of effective virtual engagement tools to meet evolving customer preferences in a digital-first environment.
- **2020 (4th Edition):** 77% of sales leaders reported that digital transformation accelerated rapidly, making virtual selling a necessity. However, only 31% of sales leaders indicated that they are completely capable of adapting to changing conditions as it relates to sales technology.
- **2022 (5th Edition):** 84% of sales teams adapted to virtual selling, but many cited tech adoption as a barrier to consistent performance.

Finding the right tools for this shift requires prioritizing platforms that are designed as sales enablement solutions first and foremost. Solutions that emphasize comprehensive integration, training, and real-time support can better facilitate virtual/hybrid selling environments by simplifying processes, enhancing collaboration, and driving faster AI deployment.

Qualifying the Right Enablement Tools for Effective Integration

To bridge the gaps in sales enablement, sales teams should prioritize tools that position sales enablement as their core function. The right solution should offer:

- **Sales Enablement as a Core Functionality:** Prioritize tools that integrate seamlessly into existing workflows, making enablement a natural part of everyday sales activities.
- **AI-Driven Insights:** Choose platforms that offer real-time guidance and personalized support to drive more efficient sales processes.
- **Consolidation of Tools:** Opt for solutions that streamline the tech stack, enabling sales teams to consolidate tools while improving adoption rates.
- **Adaptability to Remote Models:** Ensure that platforms can support remote and hybrid selling models, facilitating virtual communication and effective sales enablement across all environments.

Achieving True Enablement with Integrated Solutions

Effective sales enablement requires more than just basic resources—it demands strategic solutions that prioritize seamless integration, accurate data, and real-time support. Sales teams should focus on platforms that drive enablement first, ensuring smoother transitions to virtual models, improved tech stack management, and successful AI implementation. By doing so, sales teams can achieve consistent quota attainment and stronger performance in a dynamic sales environment.

Questions for You to Consider

- How effectively does your current sales enablement tool integrate into your sales reps' daily workflows?
- Are your enablement resources primarily focused on boosting sales reps' productivity, or do they require significant manual input?
- Is your tech stack streamlined enough to support both in-person and virtual sales environments without causing confusion or inefficiencies?
- What challenges are your sales reps facing when adapting to hybrid selling models, and how can improved integration address these issues?
- Does your current enablement platform offer real-time support and AI-driven insights to guide reps toward consistent quota attainment?

Samir's Urgent Recommendations

- **Prioritize Seamless Integration:** Choose enablement tools that integrate effortlessly with your CRM and daily workflows to ensure smooth adoption and increased productivity.
- **Streamline Your Tech Stack:** Look for solutions that consolidate multiple tools into one cohesive platform, minimizing friction and improving efficiency for virtual, hybrid, and in-person selling.
- **Enhance Real-Time Support:** Implement enablement tools that provide immediate, AI-driven guidance to reps, enabling quicker decision-making and faster adaptation to changing sales environments.
- **Focus on Adaptability:** Ensure your tools are built to support remote and hybrid models, offering effective training, communication, and collaboration regardless of location.



Let's Enable Sales for Consistent Quota Attainment

Ready to transform your enablement strategies into tangible sales outcomes? Let's discuss the optimal strategy on Zoom.

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The Double-Edged Sword of CRM and Technology

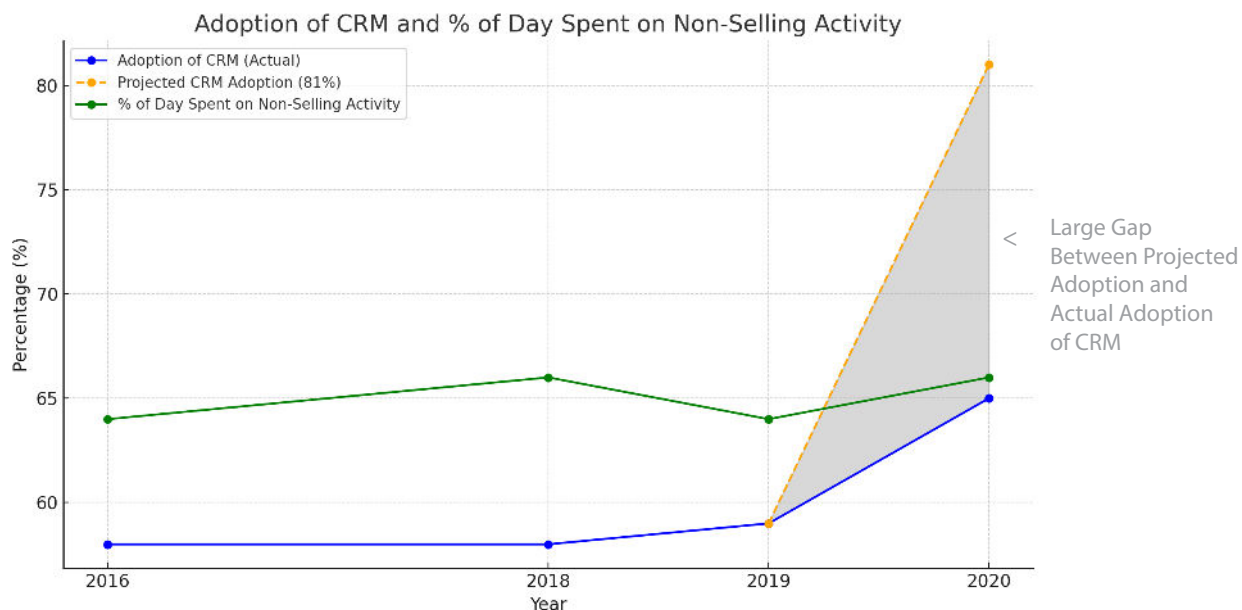
The Paradox of Technology: CRM as a Solution and a Burden

Customer Relationship Management (CRM) systems, particularly Salesforce, have become essential tools for modern sales teams. They are designed to streamline workflows, provide valuable customer insights, and drive higher productivity. However, for many sales professionals, CRM adoption has become a double-edged sword. Despite their potential benefits, CRM tools are often cited as a source of frustration, busy work, and inefficiency.

Across the six State of Sales reports, this paradox emerges repeatedly: while sales teams recognize the value of CRM, the complexity and time-consuming nature of these systems hinder productivity and quota attainment.

- **2018 (3rd Edition):** Only 58% of salespeople fully adopted CRM tools, with 58% agreeing that CRM systems felt like busy work rather than adding value. Sales reps struggled with manual data entry and felt that CRM usage detracted from time spent on core selling activities.
- **2022 (5th Edition):** Sales teams reported even lower CRM adoption rates, with only 37% believing that their organization fully utilized its CRM's capabilities. Complex tech stacks, compounded by low data quality and disjointed workflows, contributed to dissatisfaction.
- **2024 (6th Edition):** Despite advancements in CRM functionality, sales reps report that 70% of their time is still spent on non-selling activities, such as CRM data entry and administrative tasks, significantly limiting productivity and job satisfaction. Furthermore, 67% of sales reps indicated they did not expect to meet their quotas, with CRM inefficiencies cited as a contributing factor.

Actual Adoption and Projected Adoption of CRM, and Time Spent W/O CRM Automation



Tech Stack Overload and Its Impact on Sales Productivity

The growing complexity of tech stacks has exacerbated the CRM adoption issue. Today's sales teams juggle an average of 10 tools to close deals, and instead of enabling reps to sell more efficiently, this overload often leads to frustration and inefficiency.

- **CRM Overload:** With CRMs often acting as the central hub for all sales activities, they become bogged down with multiple integrations, data silos, and redundant workflows, creating tech friction.
- **Manual Processes:** Despite advancements in automation, many sales teams still rely heavily on manual data entry and updates, further contributing to busy work and detracting from selling time.
- **Data Fragmentation:** The inability to synchronize customer data across tools leads to incomplete or inaccurate records, forcing reps to spend additional time cross-referencing information rather than engaging with prospects.

These tech-related challenges are directly correlated with lower productivity, decreased morale, and higher turnover rates.

Streamlining CRM with Salesforce Automation Tools

CRM automation technology is evolving, with Salesforce and other CRM platforms introducing advanced features to improve user experience. However, even these platforms can struggle to master automation and data accuracy. When they do, the cost is often two to three times higher than that of specialized third-party applications.

Effective CRM automation should focus on:

- **Automated Data Entry:** Tools that can automate data entry, updates, and validation significantly reduce the time reps spend on manual tasks, increasing selling time.
- **Consolidated Tech Stacks:** The best automation solutions integrate various sales tools into a single platform, simplifying workflows and reducing friction.
- **Real-Time Customer Insights:** Solutions that provide actionable insights and personalized recommendations allow reps to engage more effectively and close deals faster.

Prioritizing CRM automation technology that offers these benefits can help sales teams minimize the burdens associated with complex tech stacks and focus more on selling activities.



Quickly improve 15 Sales Performance KPIs—including CRM Adoption—by [reading my 7 Sales Secrets Book](#).

The Increasing Complexity of Sales Roles

Sales roles have become significantly more complex over the years. As buyers grow more sophisticated and digital transformation accelerates, sales teams must adapt quickly and acquire a broader range of skills. This increasing complexity is reflected in the State of Sales reports, where sales professionals cite the need for faster adaptation, greater resource management, and more diverse responsibilities.

- **2018 (3rd Edition):** Sales reps increasingly collaborated across departments, with 77% indicating that working alongside teams such as marketing and customer service was essential for success. This model of cross-functional engagement, driven by complex customer journeys, added another layer of responsibility to sales roles, requiring reps to manage information and relationships across multiple touchpoints
- **2022 (5th Edition):** Sales professionals indicated that adapting to new selling methods—such as virtual selling and hybrid models—added to their workload and required new skill sets that traditional training programs didn't fully cover.
- **2024 (6th Edition):** The pressure to manage multiple responsibilities, from administrative duties to customer engagement, has only intensified. The demand for real-time data, fast decision-making, and diverse communication channels has stretched sales reps thin, increasing burnout risks and decreasing overall performance.

Simplifying Sales Roles with Sales Enablement-First Solutions

To effectively manage complex sales roles, sales teams should prioritize tools that are designed as sales enablement solutions first. The right tools can remove non-human (non-selling) tasks, allowing reps to focus on human (selling) activities.

Look for solutions that:

- **Prioritize Sales Enablement:** Choose tools designed to streamline processes and provide resources that support selling activities, making adaptation easier and faster.
- **Sales AI for Human Activities:** AI-driven sales tools that automate routine administrative tasks, from CRM updates to lead prioritization, can help reps dedicate more time to customer interactions.
- **Integrated Solutions:** Solutions that consolidate communication, data insights, and task management into a single platform can simplify workflows and reduce workload, allowing reps to navigate complex roles more effectively.



Jeff Grice
Innovative Sales Enablement Pioneer

“Success today requires simplifying complexity—enabling reps to focus on real human connections by leveraging tools that automate tasks and streamline workflows.”

From Burden to Boost

While CRM systems are essential for modern sales teams, their complexity can become a burden without the right approach. Prioritizing solutions that focus on enablement, automation, and integration transforms CRM from a source of busy work into a driver of productivity. As sales roles become more complex, sales teams need tools that simplify workflows, enhance engagement, and support consistent quota attainment.

Questions for You to Consider

- Are your sales tools designed to simplify workflows, or are they adding to the complexity of your sales reps' daily routines?
- How often do your sales reps mention CRM adoption challenges in their feedback? What are the most common issues?
- How well does your current CRM automation reduce manual data entry and enable real-time customer insights?
- What specific tasks could be automated or eliminated to allow reps to focus more on direct selling activities?
- Are your sales tools adaptable to evolving sales roles, supporting both administrative and customer-facing activities?

Samir's Urgent Recommendations

- **Streamline Your Tech Stack:** Consolidate tools and simplify CRM usage by integrating automation solutions that eliminate redundant workflows and provide real-time customer insights.
- **Reduce Manual Data Entry:** Prioritize CRM automation tools that handle data updates, validation, and synchronization to minimize busy work and increase selling time.
- **Adapt to Evolving Sales Roles:** Choose sales enablement-first solutions that effectively support reps' adaptation to evolving roles, allowing them to focus on customer interactions and building relationships.
- **Focus on Human-Centric Selling:** Implement AI tools that handle routine tasks, freeing up reps to engage in meaningful conversations that drive conversions.



Let's Transform Your CRM from Burden to Boost

Ready to transform your CRM into a productivity driver? Let's discuss how to simplify complex sales roles.

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Veloxly's Strategic Role in Achieving Sales Success

Over the past eight years, Veloxly has emerged as a strategic partner to sales organizations, consistently activating high-performers across every Salesforce State of Sales report. Veloxly's innovative solutions have helped sales teams overcome the persistent challenges outlined in previous chapters, providing measurable improvements in sales productivity, CRM utilization, AI adoption, and quota attainment.

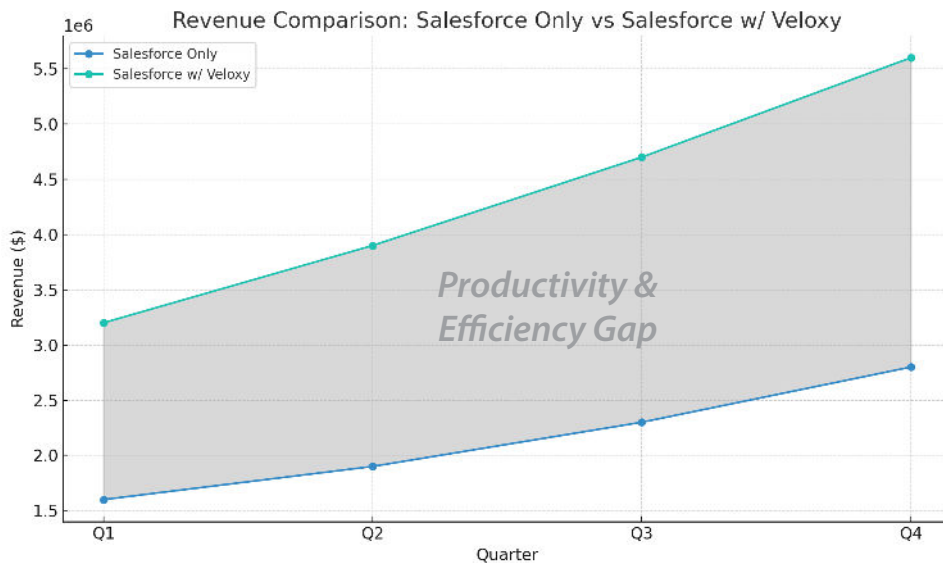
Here's how Veloxly has contributed to these successes.

Enhancing Salesforce Potential and CRM Utilization

From the outset, Veloxly has been instrumental in maximizing the potential of Salesforce. By integrating seamlessly with the world's #1 CRM platform, Veloxly reduces tech stack complexity and improves user experience. It addresses a core issue identified in Chapter 2: the disconnect between CRM growth and actual sales productivity. Veloxly's automation of data entry and synchronization, along with its intuitive interface, enables reps to manage workflows efficiently, boosting CRM adoption and confidence in selling activities.

Veloxly's impact is deep and simple:

- **Simplified Workflows:** By integrating tools and automating routine tasks, Veloxly ensures that reps can focus more on selling, aligning with the primary goal of reducing non-selling time (Chapter 3).
- **Data Accuracy and AI Solutions:** Veloxly's AI-powered solutions have bridged the gap between AI's potential and real-world outcomes by automating data entry, lead prioritization, and personalized selling guidance (Chapter 4).
- **Improved Quota Attainment:** Veloxly's tools have enabled teams to better align growth strategies with execution by freeing up reps' time and providing data-driven insights that lead to consistent quota attainment (Chapter 5).



Reducing Non-Selling Time and Driving Quota Attainment

One of Veloxy's greatest contributions has been in reducing non-selling time, a persistent challenge for sales teams, as outlined in Chapter 3. By automating administrative tasks like data entry, Salesforce updates, and lead prioritization, Veloxy has enabled reps to reclaim valuable selling time. This strategic focus has had a direct impact on quota attainment, allowing sales teams to exceed growth targets and reduce turnover, even as sales roles become increasingly complex.

Veloxy's AI tools have also played a critical role in personalization efforts (Chapter 6), helping reps deliver trust-based interactions that meet buyers' expectations. With its real-time insights and targeted support, Veloxy helps reps act as trusted advisors, leading to stronger customer relationships and higher conversion rates.

Overcoming AI Adoption Barriers

Chapters 4 and 7 highlighted the barriers to AI adoption—trust, budget constraints, and inadequate training. Veloxy's user-friendly, transparent AI tools have made it easier for sales teams to implement AI without overwhelming their budgets. By prioritizing clear explanations of AI outputs, secure data handling, and comprehensive training, Veloxy has effectively addressed the “black box” concerns that limit AI trust.

Boosting Sales Enablement and Technology Integration

Chapter 7 emphasized the need for better sales enablement and tech integration. Veloxy's sales enablement-first design consolidates multiple tools into one platform, reducing tech stack complexity and increasing Salesforce adoption rates. This integration is crucial for virtual and hybrid selling models, where seamless communication, real-time support, and personalized action plans are essential.

Transforming CRM from Burden to Boost

As detailed in Chapter 8, CRMs like Salesforce often act as a double-edged sword, complicating sales processes rather than simplifying them. Veloxy has flipped this narrative by streamlining CRM management and boosting productivity. By automating data entry, consolidating sales tools, and providing real-time insights, Veloxy has helped transform Salesforce installations from burdensome to beneficial, allowing reps to focus more on core selling activities.

Veloxy's Role in Simplifying Complex Sales Roles

Sales roles have evolved dramatically, becoming more demanding and requiring diverse skill sets. Veloxy addresses these complexities by automating routine tasks and consolidating essential sales tools, allowing reps to focus on human-centric selling activities. This aligns with the need for enablement-first solutions that impress direct selling efforts and sales engagement.

Veloxy's Strategic Contribution to Sales Performance

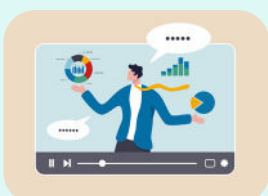
Over the past eight years, Veloxy has proven to be more than just a tool—it has been a catalyst for sales transformation. By addressing core challenges like CRM utilization, non-selling time, AI adoption, and tech integration, Veloxy has helped sales teams achieve high performance across every Salesforce State of Sales report. It stands out as a comprehensive, integrated solution that boosts productivity and fosters sustainable growth in an evolving sales landscape.

Questions for You to Consider

- How has your sales team's experience with CRM tools evolved over time? What challenges persist, and where do you see the most potential for improvement?
- Are your sales tools helping you achieve growth goals, or are they contributing to inefficiencies?
- What steps could be taken to streamline your tech stack, making it easier for reps to focus on selling?
- How well do your current AI tools align with your sales reps' daily workflows? Are they intuitive, transparent, and user-friendly?

Samir's Urgent Recommendations

- **Maximize CRM Automation:** Focus on integrating tools that simplify CRM workflows, automate manual tasks, and provide actionable insights.
- **Reduce Tech Complexity:** Prioritize consolidating your tech stack to improve CRM adoption and enable sales reps to dedicate more time to selling activities.
- **Leverage Practical AI:** Implement transparent, user-friendly AI solutions that align with reps' workflows and provide clear value in lead prioritization and personalized selling.



Let's Turn Insights into High Performance

Ready to drive consistent sales performance and growth?
Let's discuss how Veloxy can become your enablement arm!

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The Checklist

Samir's Urgent Recommendations: A Checklist for Sales Teams

- Evaluate CRM Integration:** Assess if your CRM workflows are fully integrated, and identify any gaps slowing down sales efforts.
- Streamline Your Tech Stack:** Consolidate tools and simplify CRM usage to reduce friction, automate redundant workflows, and improve CRM adoption.
- Leverage Complementary Solutions:** Identify productivity tools or AppExchange apps that streamline workflows, automate tasks, and improve CRM utilization.
- Prioritize Training and Adoption:** Ensure your team has the necessary training to fully leverage your CRM, integrated apps, and AI tools, boosting productivity and engagement.
- Focus on Automation:** Identify key areas for automation, such as data entry, lead prioritization, and proposal generation, to reduce manual tasks and increase selling time.
- Invest in AI Sales Assistants:** Use AI tools for predictive analytics, real-time insights, and streamlined processes to enhance productivity.
- Choose Transparent, Scalable AI Solutions:** Opt for AI tools that provide clear, understandable outputs, and start with budget-friendly options that offer high ROI to build trust and scalability.
- Enhance Data Accuracy:** Regularly review AI-generated data to ensure it remains complete, accurate, and actionable for personalized interactions.
- Align AI with Sales Needs:** Use AI in areas like lead prioritization, forecasting, and personalization to maximize impact and drive decision-making.
- Build Confidence Through Execution:** Ensure that sales reps have access to actionable insights and real-time guidance to translate strategic confidence into operational success.
- Address Barriers to Quota Attainment:** Identify and resolve major roadblocks, including time management issues, training gaps, or inadequate tools, to improve sales performance.
- Focus on Adaptable Growth Strategies:** Choose sales solutions that can quickly adapt to evolving strategies to maintain growth momentum.

The Checklist (continued)

Samir's Urgent Recommendations: A Checklist for Sales Teams

- Centralize Buyer Insights:** Use tools that consolidate customer data from multiple sources, ensuring reps have timely, accurate, and comprehensive insights.
- Enhance AI-Driven Personalization:** Implement AI tools that offer real-time, personalized messaging suggestions to help reps build stronger trust with customers.
- Invest in Targeted Enablement Training:** Equip sales reps with strategic selling skills, emphasizing value-driven client interactions and fostering trusted advisor relationships.
- Ensure Seamless Integration:** Choose enablement tools that integrate smoothly with your CRM to increase productivity and reduce barriers to adoption.
- Adapt to Evolving Sales Roles:** Implement enablement solutions that help reps adapt to changing roles, allowing them to focus more on customer engagement.
- Support Hybrid Selling Models:** Ensure tools are adaptable for remote and hybrid environments, enhancing communication, training, and collaboration.
- Focus on Human-Centric Selling:** Leverage AI to automate routine tasks, freeing up sales reps to focus on high-value customer interactions.
- Enhance Real-Time Support:** Provide immediate AI-driven guidance to sales reps for quicker decision-making and faster adaptation.
- Maximize CRM Automation:** Use tools that simplify CRM workflows, automate manual tasks, and provide actionable insights to drive efficiency.

Let's Check Off 5 - 10 Boxes on a Zoom Call

Without massive disruption, let's review this checklist to discover quick wins that will drive positive reputation!

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