2016 SALES PROFESSIONAL SURVEY

The 8 Most Important Takeaways Based on Position
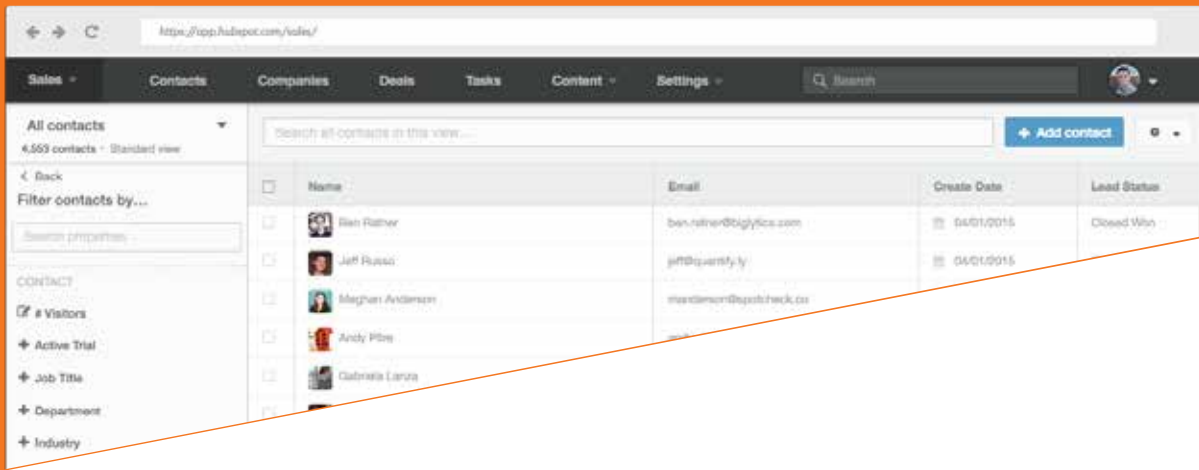
applango + HubSpot

DON'T HAVE A CRM OR LOOKING TO CHANGE?

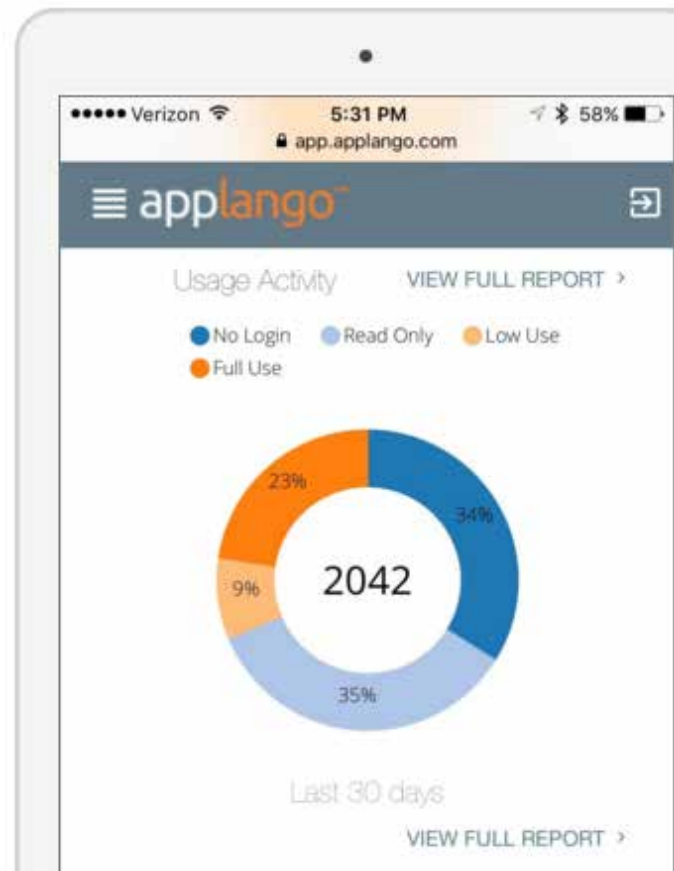## Give HubSpot's CRM a try for FREE!

GIVE IT A TRY

LOOKING TO GET BETTER DATA ON HOW YOUR TEAM IS USING SALESFORCE?

Improve your sales productivity and cut costs with **applango**
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Summary

The single biggest issue that companies have with their CRM isn't the provider or the features of the CRM itself, but with how their CRM is used by their sales professionals -- or the lack of use. Promoting high adoption rates has been a challenge for CRM providers, who have aimed to make their software as intuitive as possible, while still maintaining powerful functionality.

To better understand the issues we conducted 2016 Sales survey and asked 700 sales professionals questions regarding their CRM usage and sales success. These professionals, are segmented in three categories; CRM Administrators, Sales Managers, and Sales Professionals.

The theme discovered in this research is that Sales Professionals are not using their CRM due to bad processes and a lack of adequate training. This leads to missed sales opportunities and lower effectiveness in closing sales. It also results in wasted resources and increasing frustration between Sales Management and Sales Professionals.

Introduction

Applango is dedicated to improving companies' CRM experience by identifying areas of improvement such as process analysis, CRM usage, and license management. In an effort to solve these problems and provide the most powerful service possible, we are constantly studying the latest research and examining data in the sales industry.

The information presented in this study illustrates a disconnect between Sales Management and Sales Professionals. On one side, Management is frustrated by low adoption rates and poor usage of their CRM by Sales Professionals. On the other side, Sales Professionals report that they lack the training to properly use their CRM, which leads some to not use it at all.

Based on the findings in this survey, organizations are missing out on the full potential that usage of CRM provides. Organizations that are using Salesforce and/or HubSpot, solutions can benefit from increasing training, refining processes, and increase in transparency. Applango provides information on exactly which users need help and what processes are hampering adoption.

# Effective ways to get Sales Professionals to use CRM

Effective ways to get Sales Professionals to use CRM

One of the biggest challenges facing businesses is getting their sales professionals to use their CRM. In addition to staggering adoption rates, companies also struggle to get their sales teams to make use of the full functionality of their CRM. The results are wasted resources and loss of potential sales revenue. Sales enablement solutions e.g. Inbound Sales are hampered when Sales Professionals do not have confidence in the system.

All of the participants surveyed agree that training is vital for getting sales teams to adopt CRM, but the favorable methods of training vary between different positions in the organization.

1 Takeaway #1: Sales professionals require better training to increase adoption of CRM.
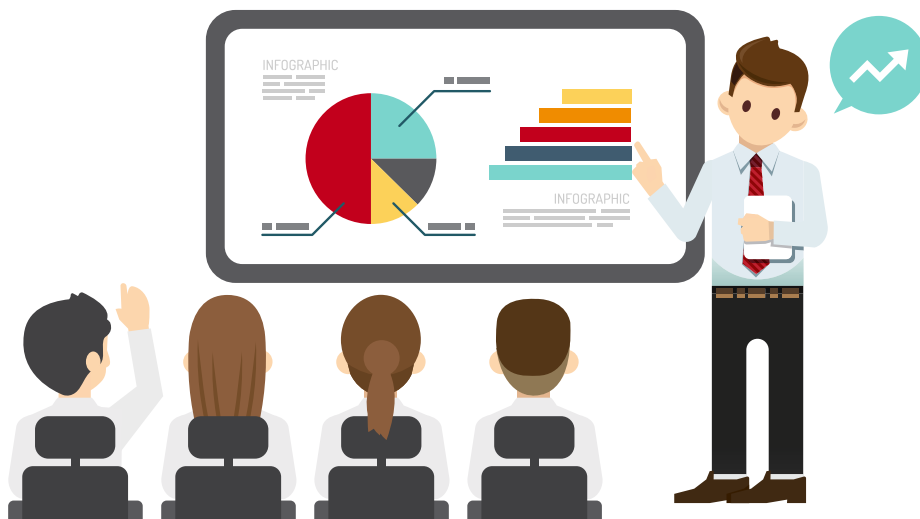
With Applango, Sales Managers have the ability to follow trends in adoption, identify areas that need improvement, and gain insights into what remediation methods work most effectively. Having an understanding of the exact features that require more training and the ability to track the results of training takes all of the guesswork out of the equation and ultimately, saving time and money for management.

Salesforce Administrators

The majority of Salesforce administrators believe live training sessions are the most impactful method for increasing CRM adoption among sales professionals. Nearly half of Salesforce administrators responded that gamification of the training process can also improve adoption rates.

Most Effective Ways to Increase Adoption Ranked by Salesforce Administrators

	60.98%	43.90%	34.15%
	Live User Training Sessions	Gamification of Process	Carrot & Stick Approach
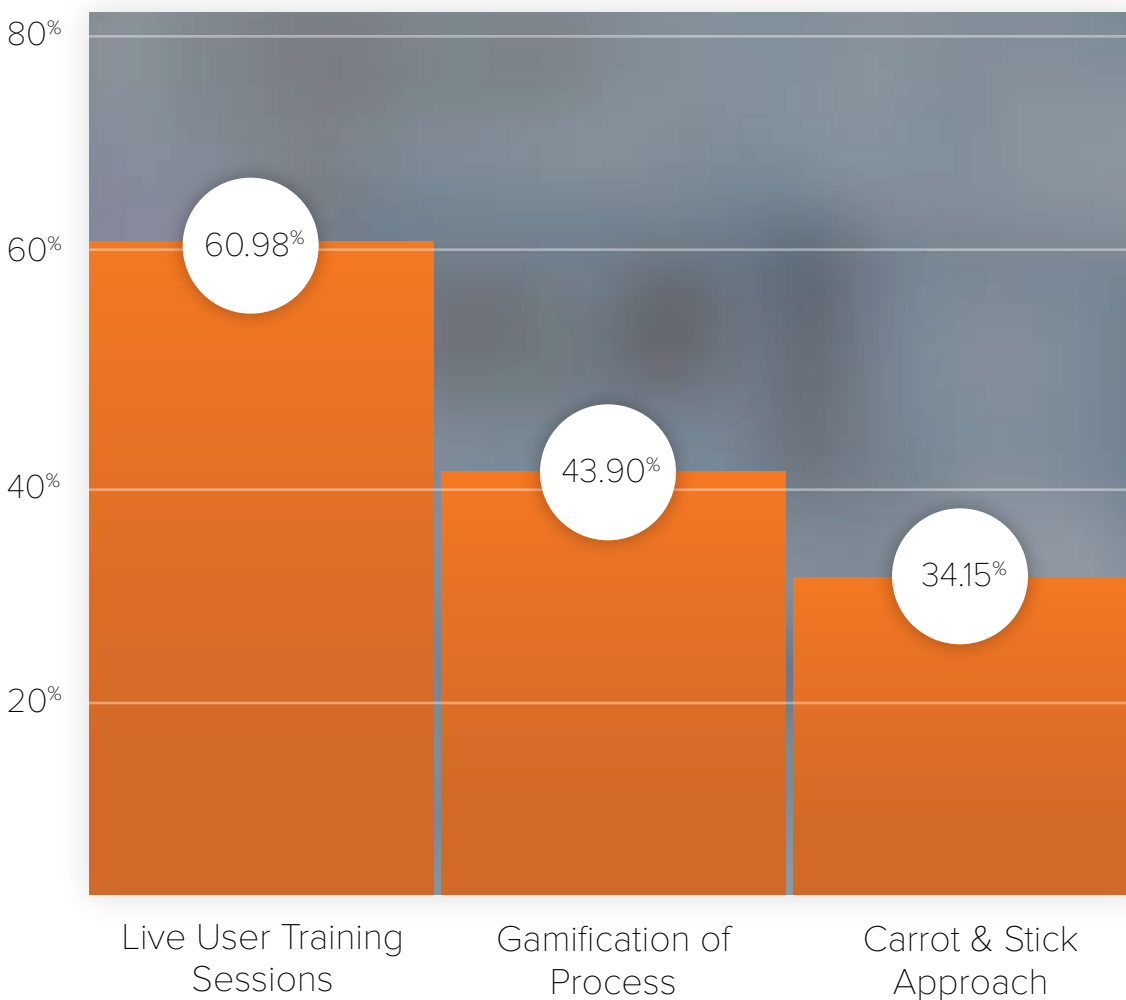
Sales Management

Live user training sessions are also most favored by Sales Management for their effectiveness with increasing CRM adoption rates. Half of Sales Management respondents said recorded user training sessions are also effective.

Most Effective Ways to Increase Adoption Ranked by Sales Management

Bar chart with y-axis from 20% to 80%:
- Live User Training Sessions: 59.31%
- Recorded User Training Sessions: 50.65%
- Gamification of Process: 41.56%
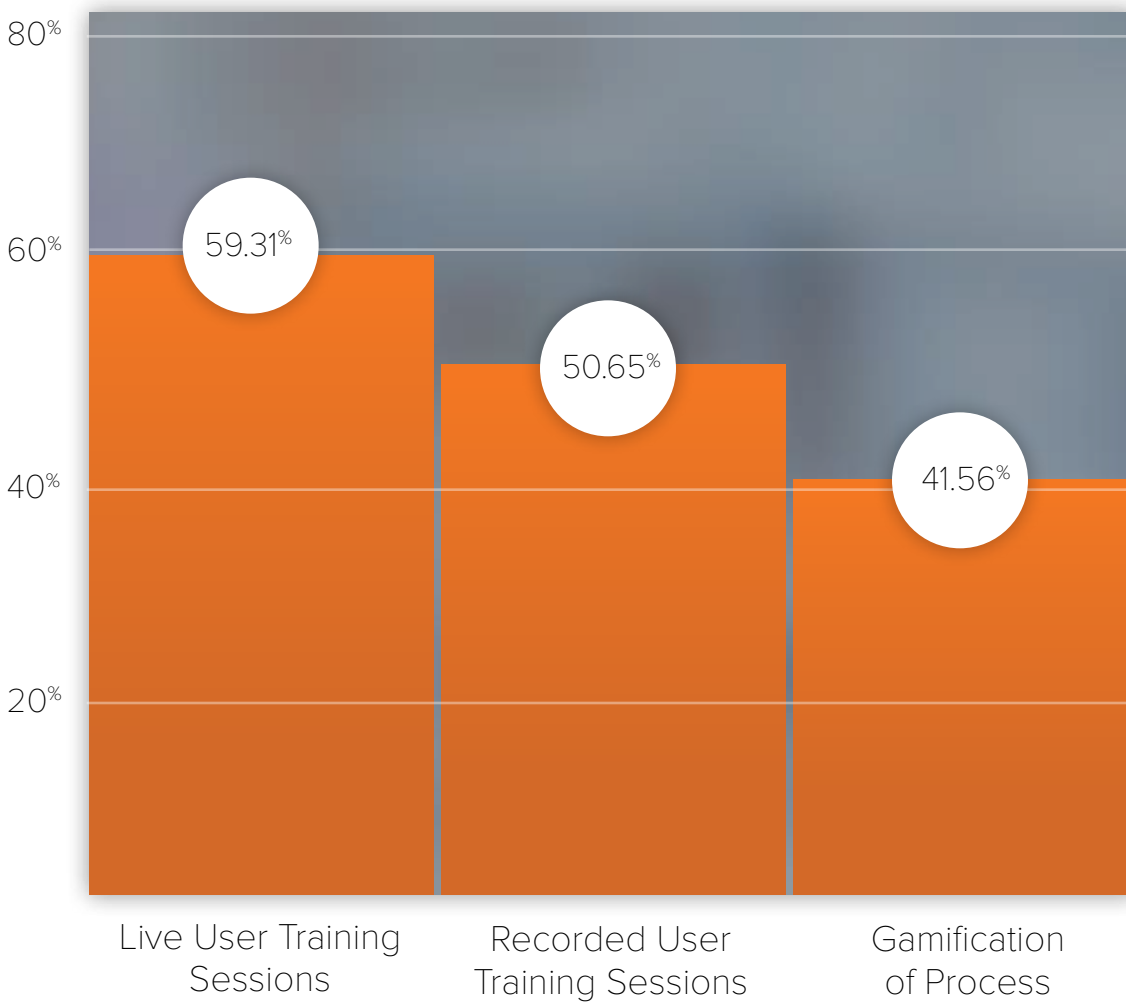
Sales Professionals

Most Sales Professionals said incentive based programs are the most effective and showed a clear preference for recorded user training sessions and live user training sessions. Sales Professionals noted they like recorded training videos so they can go back to review training and improve their skills.

Most Effective Ways to Increase Adoption Ranked by Sales Professionals

80%	
62.39%	
60%	56.88%
40%	
	29.36%
20%	
Recorded User Training Sessions	Live User Training Sessions	Gamification of Process
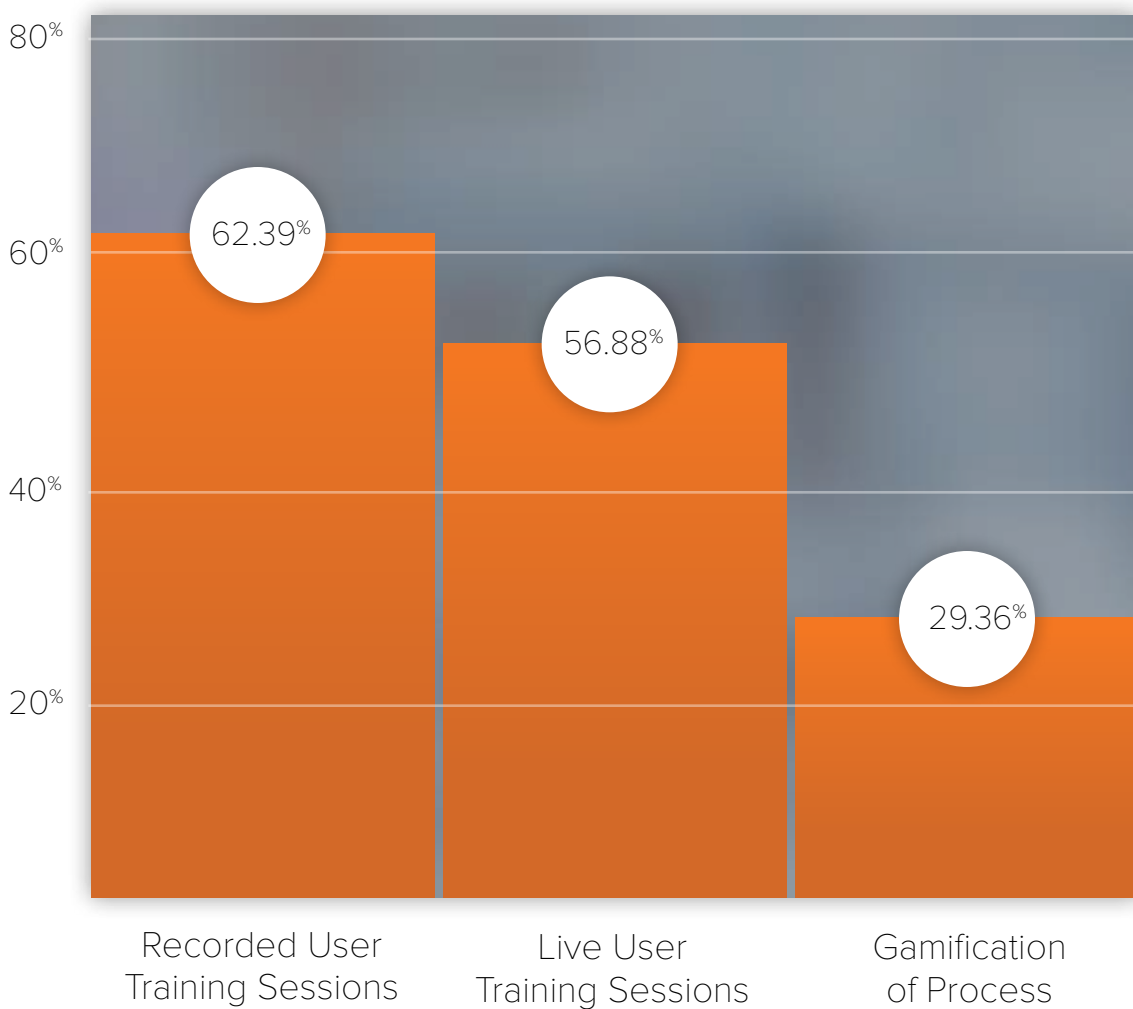
≡ Chapter 2

Biggest Challenge Based on Position

Biggest Challenge Based on Position

From an organization's perspective, adoption of CRM among Sales Professionals is the most glaring problem, but it is only one of many challenges facing companies. On the other hand, Sales Professionals responded that bad processes and inaccurate information are causing them to lose sales. This leads some Sales Professionals to not use the CRM at all.

2 Takeaway #2: Lack of adoption is a result of poor processes and inadequate training.
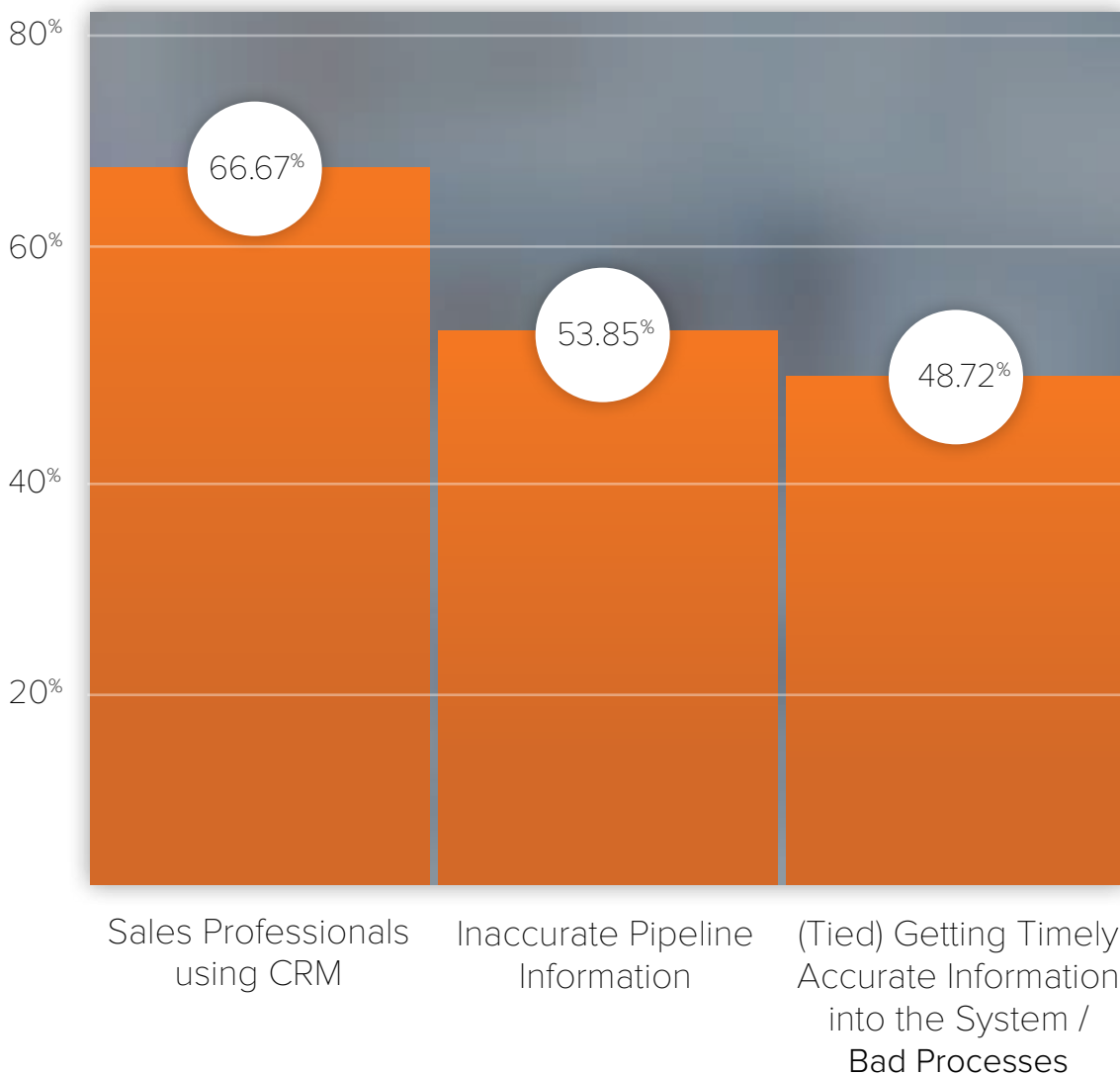

Sales Managers should research with their Sales Professionals to identify the specific areas where a process is either missing or not working smoothly. A common trouble area is having inaccurate data in the pipeline, meaning data isn't being recorded in a timely manner or some data isn't being documented at all. Applango users can solve this by enabling Sales Managers to track and monitor Salesforce usage.

Salesforce Administrators

Salesforce Administrators reported that the biggest challenge they face is getting Sales Professionals to use the CRM correctly, and for many, simply using the CRM at all. The Salesforce Administrators noted that the other challenges are a direct result of Sales Professionals not utilizing certain features due to a lack of understanding of the full functionality of their CRM.

## Top Challenges Ranked by Salesforce Admins

	66.67%	53.85%	48.72%
	Sales Professionals using CRM	Inaccurate Pipeline Information	(Tied) Getting Timely Accurate Information into the System / Bad Processes

Sales Management

Sales Management agrees with the Salesforce Administrators that Sales Professionals either aren't using the CRM or aren't using it correctly. They also both recognize inaccurate pipeline information and bad processes as significant challenges.
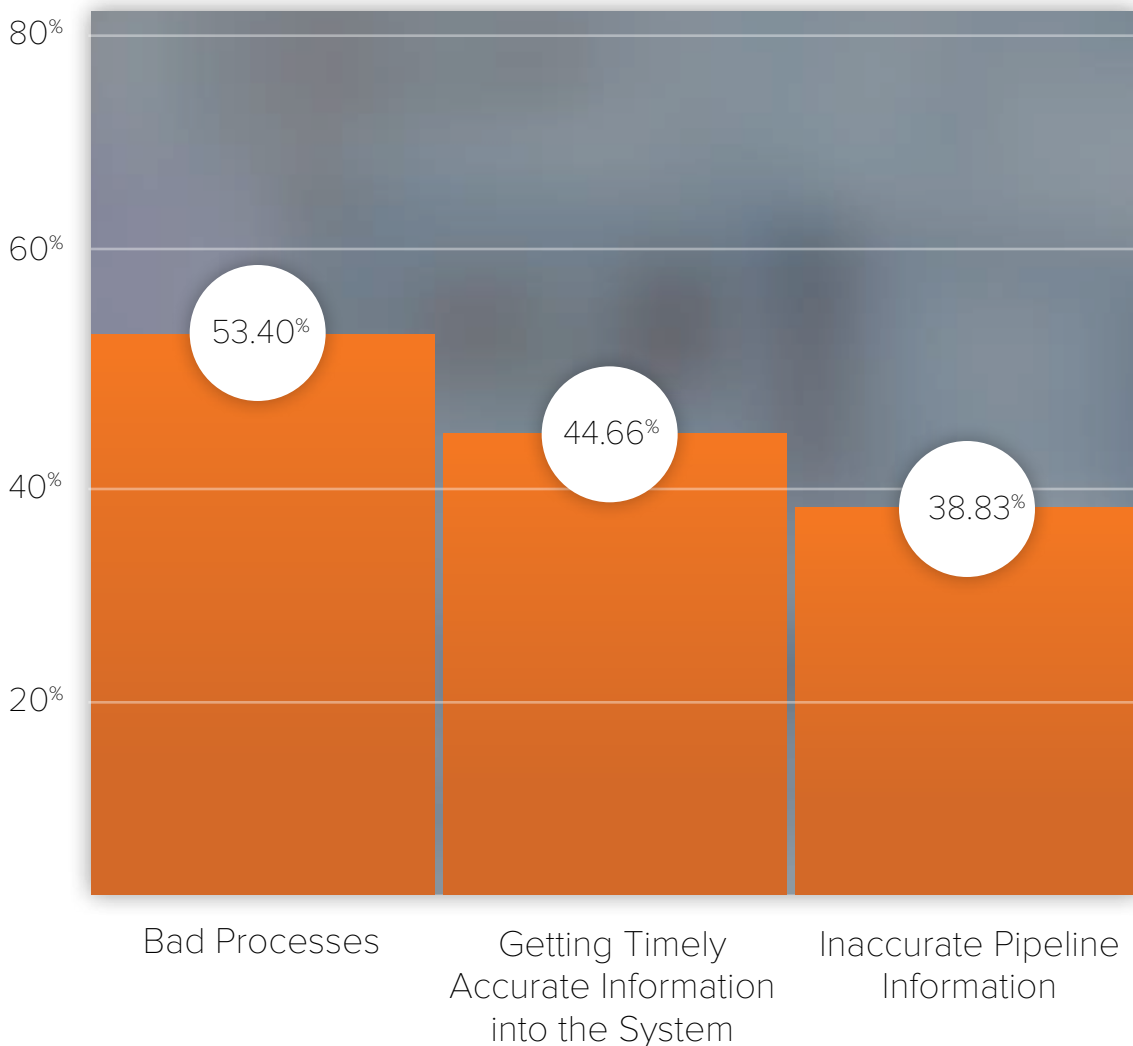
Top Challenges Ranked by Sales Management

Bar chart showing:
- Sales Professionals using CRM Correctly: 59.38%
- Inaccurate Pipeline Information: 45.54%
- Bad Processes: 41.52%
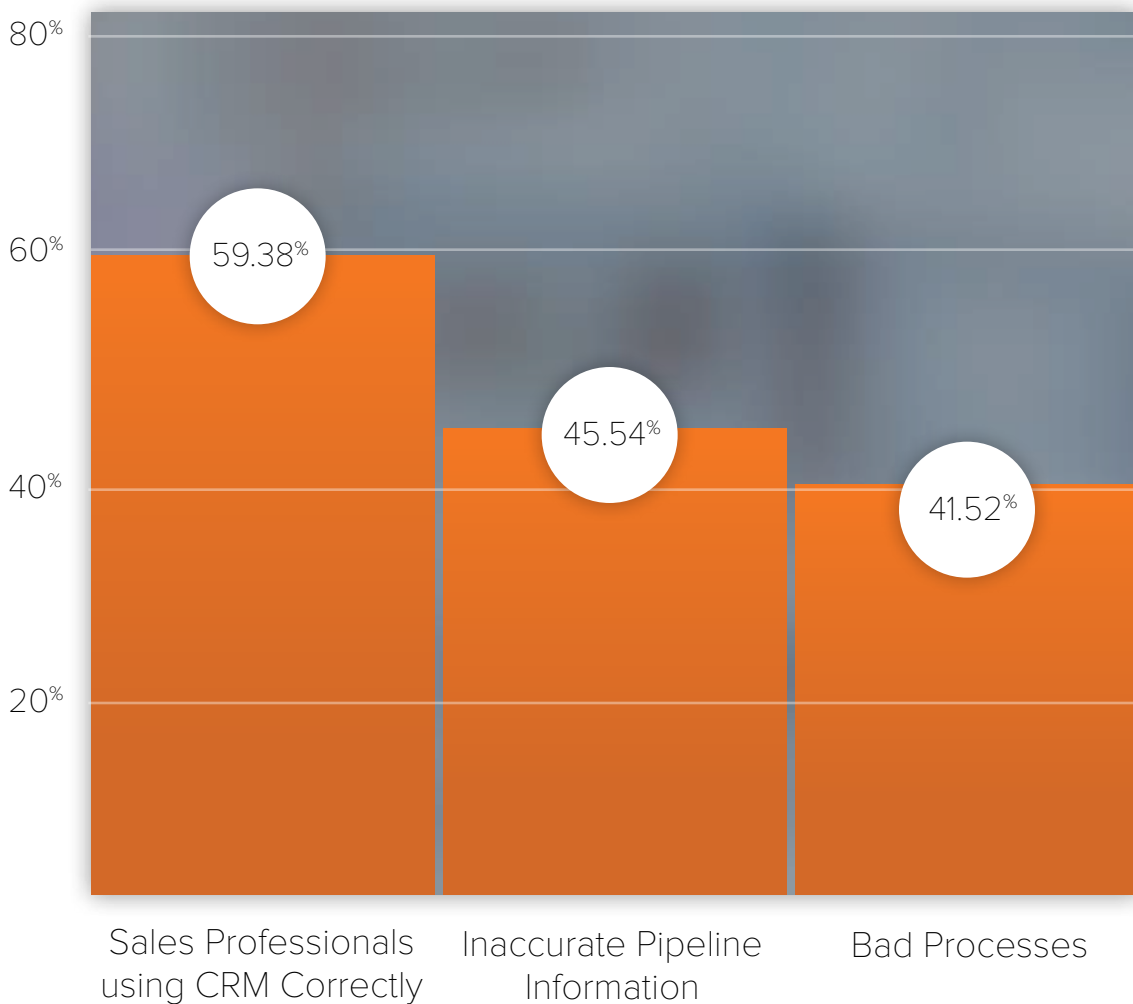
Sales Professionals

Only a third of Sales Professionals see their usage of the CRM as one of the biggest challenges and over half responded that bad processes (or lack of training) is the biggest problem. There is a clear pattern that bad processes and inadequate training lead to lack of adoption, which in turn decreases the effectiveness of the CRM and wasted resources.

Top Challenges Ranked by Sales Professionals

Challenge	Percentage
Bad Processes	53.40%
Getting Timely Accurate Information into the System	44.66%
Inaccurate Pipeline Information	38.83%

☰ Chapter 3

Breakdown of Salesforce & Hubspot CRM Among Organizations

Breakdown of Salesforce & [Hubspot CRM](#) Among Organizations

Salesforce and HubSpot are two of the most well-known CRM providers. HubSpot created their CRM as a direct response to the issues companies were having with lack of adoption among their sales teams. Based on the findings in this survey, HubSpot is gaining market share among smaller organizations, but Salesforce remains the preferred choice for larger organizations. Salesforce and HubSpot are partners and many organizations are leveraging the power of both systems to grow their business.

3

Takeaway #3: Smaller organizations prefer HubSpot and larger organizations overwhelmingly favor Salesforce.

A CRM is a must-have for companies that use Inbound Sales. HubSpot's CRM is free, which provides an obvious benefit to smaller organizations on a tight budget. Salesforce is the CRM industry leader. For companies using Salesforce, Applango helps to maximize the ROI from their CRM investment.

# Are You Using Any Form of Lead Nurturing System?

Are You Using Any Form of Lead Nurturing System?

Just over half of the organizations surveyed responded that they are not using any form of lead nurturing in their sales process. Of the companies that use lead nurturing, a quarter are using HubSpot -- the favorite choice. Over 7% responded that they were not sure which solution their organization used for lead nurturing.

Many of the companies not using a lead nurturing system rely on cold-calling for closing sales. Organization that have not implemented a lead nurturing system are missing out on many sales opportunities. An Inbound Sales approach, one that uses lead nurturing, provides Sales Professionals with warm leads that are ready to be contacted – leading to higher close-rates and a better experience for both sides.

4 Takeaway #4: Over half of companies surveyed DO NOT have a lead nurturing system.

< 50%
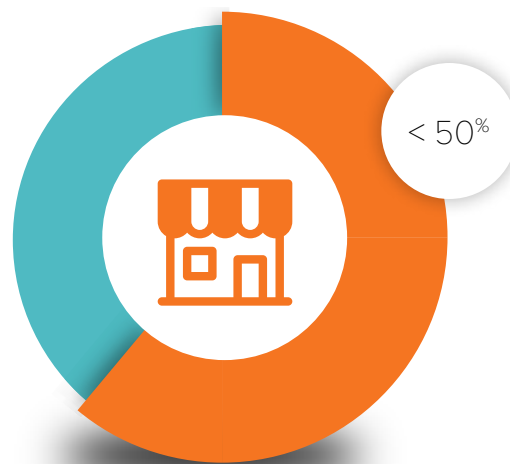
Sales Professionals that use cold-calling can benefit greatly from Inbound Sales and lead nurturing using a tool like HubSpot. A solution that documents all interactions with leads; a necessity for keeping your brand on the buyer's mind and successful selling.

Do you feel that Sales Professionals at your organization have the information required to make educated selling decisions?

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There is a disconnect with previous answers. The majority of respondents have faith in their current system and believe that Sales Professionals are currently provided with accurate information, allowing them to make the best selling decisions. Previously they stated that inaccurate pipeline information and bad processes pose significantchallenges

What this shows is that a lack of information isn't seen as a notable threat to sales close rates. Which leads to the conclusion that the problem is a disconnect between the information and the results. Either Sales Professionals don't have a full understanding of the information or they are not applying it to their sales process.

5

Takeaway #5: 70% of respondents feel their sales professionals already have the information required to make smart selling decisions.

70%
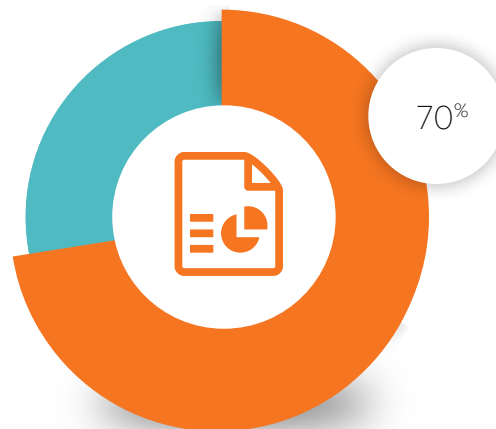
Sales Managers can survey Sales Professionals to identify high-priority information. Then they can use Applango to ensure that the most valuable information is being added to the CRM and consistently updated.

What do Sales Professionals at your organization need the most to be successful?

What do Sales Professionals at your organization need the most to be successful?

The unanimous response was that Sales Professionals need better processes to be most successful. The second most common response overall was more training, which also ties to an organization's onboarding process for new Sales Professionals.

Improved processes would increase the ROI of an organization's CRM and sales department because they would allow Sales Professionals to make better use of the CRM and ultimately close more sales.

6

Takeaway #6: The biggest challenge that is preventing sales professionals' success is the need for better processes.

There is clear agreement for better processes. Understanding which processes have the biggest need for refinement is a good first step. With Applango, Sales Managers can identify the areas which processes need improved and track the impact of any any changes to performance.

Salesforce Administrators

More than the other respondents, over half of Salesforce Administrators say better processes are most needed for Sales Professionals to be successful. More than a quarter said that more training was needed.

Interestingly, Salesforce Admins were the only group where 0% responded that nothing was needed. It's clear to them that more can be done to help Sales Professionals be as successful as possible – and it starts with improved processes.

The Most Needed Resources Ranked by Salesforce Administrators

Chart showing:
- Better Processes: 52.63%
- More Training: 26.32%
- Better Data: 18.42%

Sales Management

Less than half of Sales Management respondents said better processes are needed, but it was still the most common response. Just over a quarter of them felt more training is needed and slightly less feel better data is what Sales Professionals need most to be successful.

The third most favorable choice was better data, which is interesting because the majority of respondents answered in the previous question that Sales Professionals already have the information they need to make educated selling decisions. This tells us that there is a need for data that improves processes and maximizes potential sales success.

The Most Needed Resources Ranked by Sales Management

|	42.13%	26.85%	23.61%
	Better Processes	More Training	Better Data
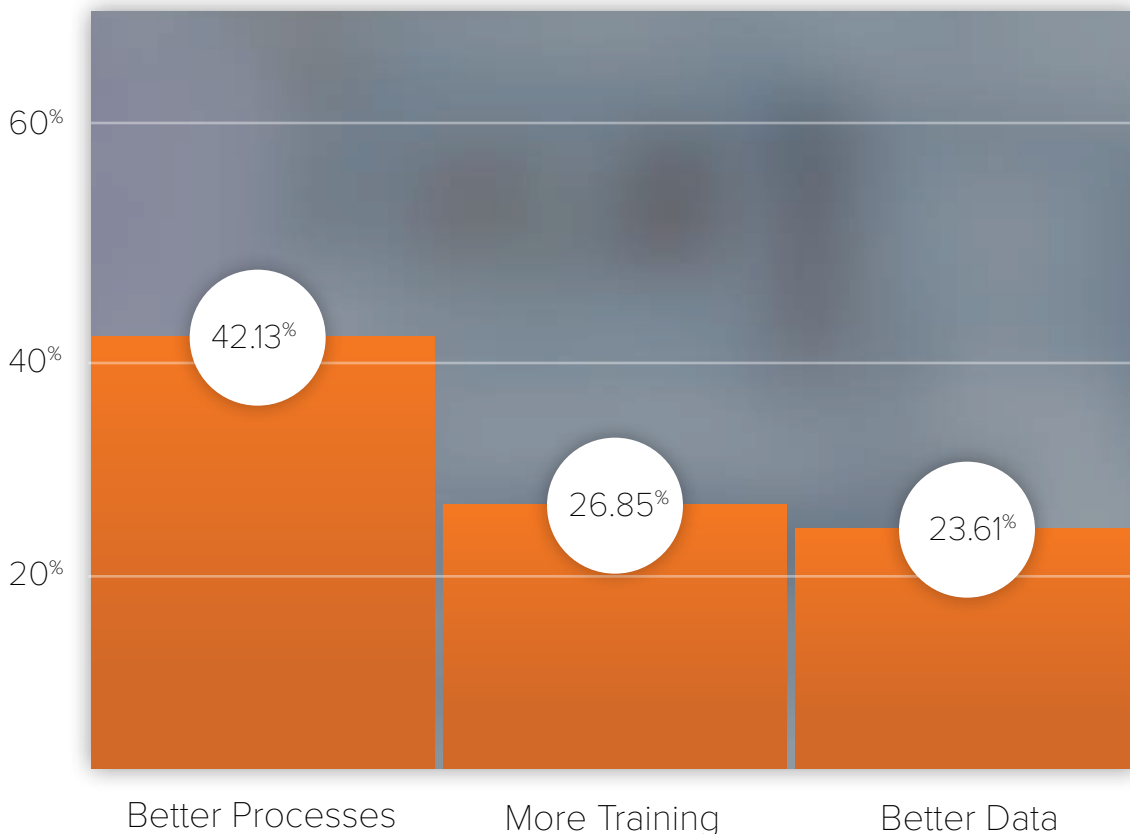
Sales Professionals

Although the total percentage was lower than the other groups, Sales Professionals also responded that better processes are most needed for their success. They generally agreed with the other groups about the need for more training and better data. However, Sales Professionals responded the highest in regards to having better tools.

An example provided by one of the respondents: "I recently realized that we don't have a system in place to show if I speak to someone on a cold call, but I don't get a 15 minute demo scheduled. We don't have an effective way to track this type of conversation, so I have no idea how many people I've reached who I just haven't been able to convert into a meeting."

The Most Needed Resources Ranked by Sales Professionals

Better Processes	Better Data	More Training
37.37%	23.23%	22.22%
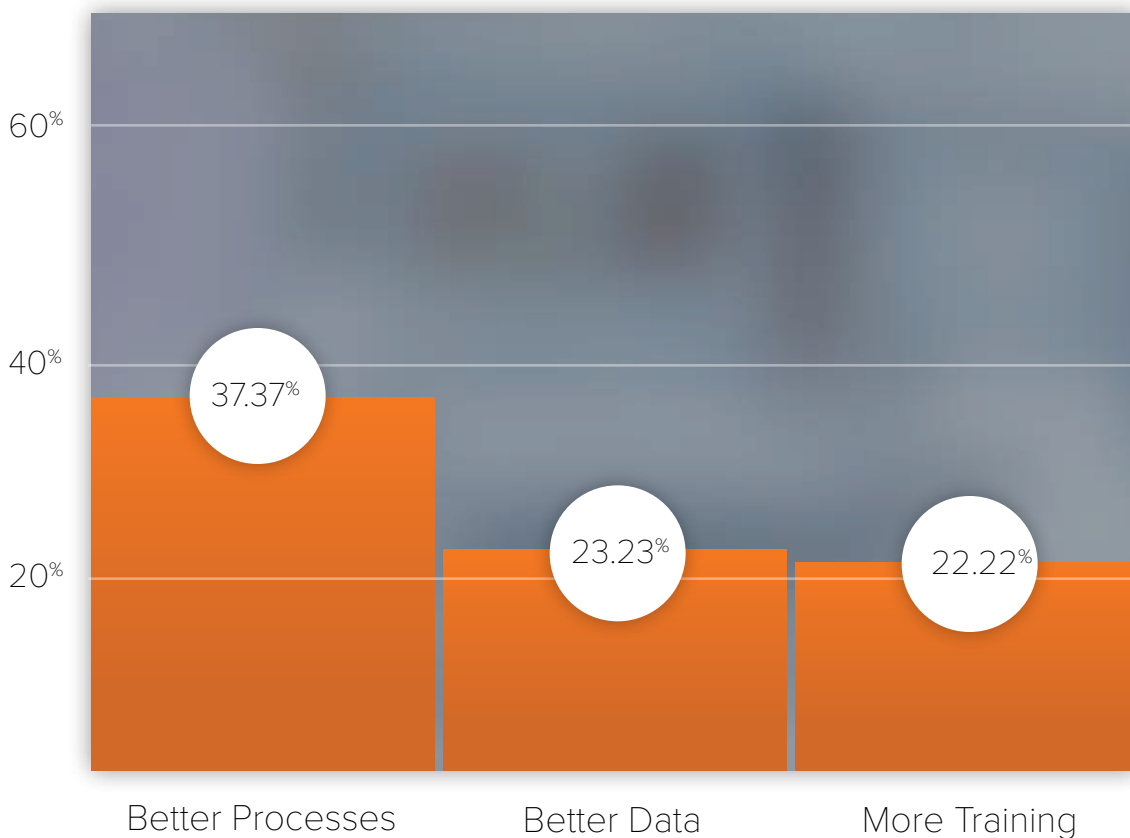
☰ Chapter 7
Most Important Sales Metric

Most Important Sales Metric

The area where all three groups were in least agreement was on the most important sales metric -- which is likely a limiting factor in their overall sales success and further illustrates the need for improved processes. However, there is a general agreement that creating opportunities and winning those opportunities are among the most important metrics.

7

Takeaway #7: Salesforce Administrators, Sales Managers, and Sales Professionals are not in agreement on what the most important sales metric is.
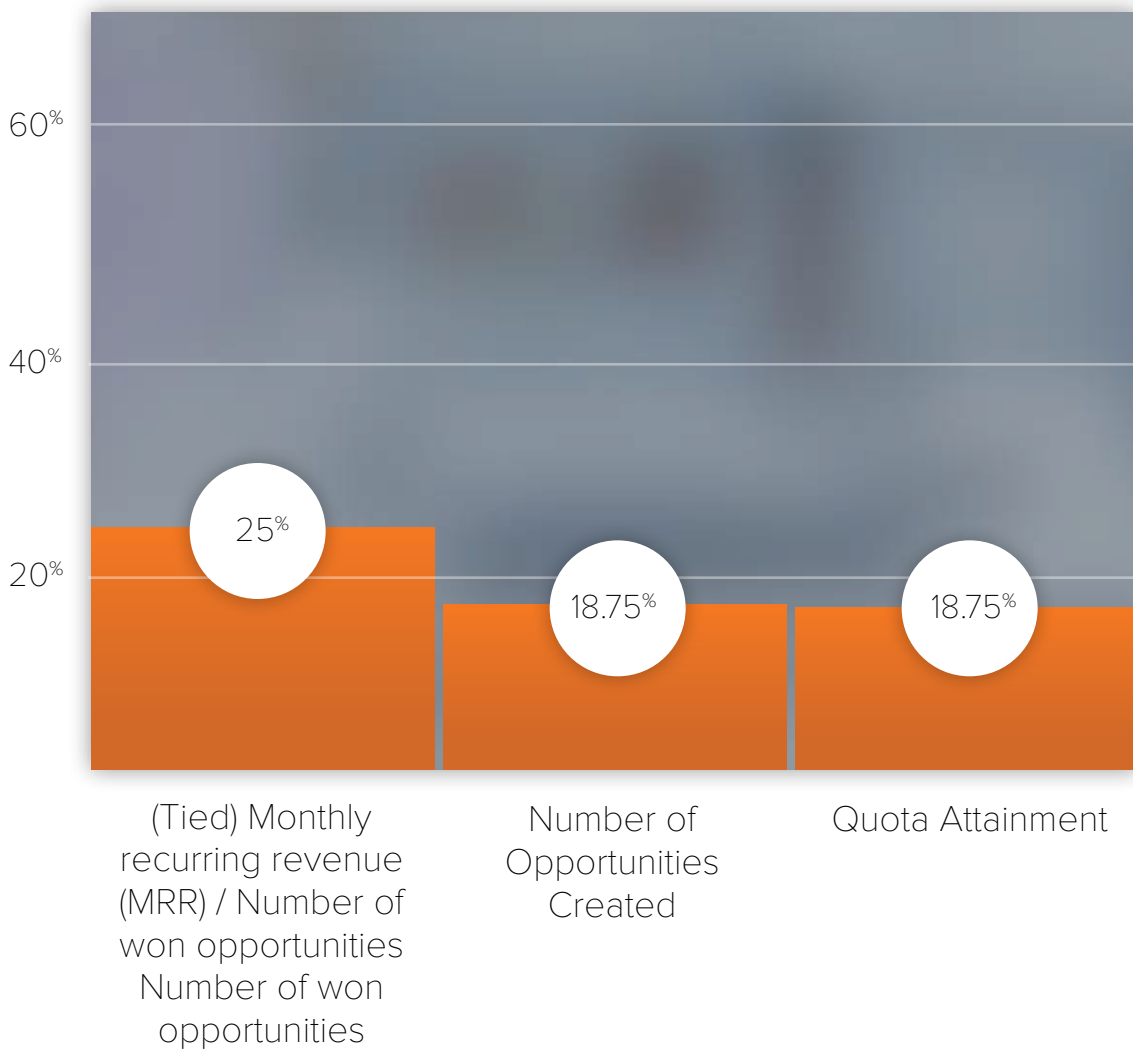
Management should decide which sales metrics are most important and ensure that everyone on the team is focusing on the same goals. Salesforce and HubSpot both have a reporting dashboard in their CRMs that makes it easy for everyone to follow the progress of the same metrics each time they log in. Applango helps Sales Managers monitor how their Sales Reps are actually using the Salesforce CRM, to make sure the team stays in-sync and focused on their target metrics.

Salesforce Administrators

Salesforce Administrators are analytical and believe in systems. They view the monthly recurring revenue and number of won opportunities as the (tied) most important metrics. As long as revenue streams continue to rise and Sales Professionals are winning their opportunities, the system in place is working.

Top Three Metrics Ranked by Salesforce Administrators

Chart showing:
- (Tied) Monthly recurring revenue (MRR) / Number of won opportunities Number of won opportunities: 25%
- Number of Opportunities Created: 18.75%
- Quota Attainment: 18.75%

Sales Management

It's clear from the responses that Sales Management wants to see their Sales Professionals closing the highest percentage of their sales possible. One of the obvious solutions (based on this survey) is to improve processes that increase adoption of their CRM, which ultimately makes it easier for Sales Professionals to close more sales.
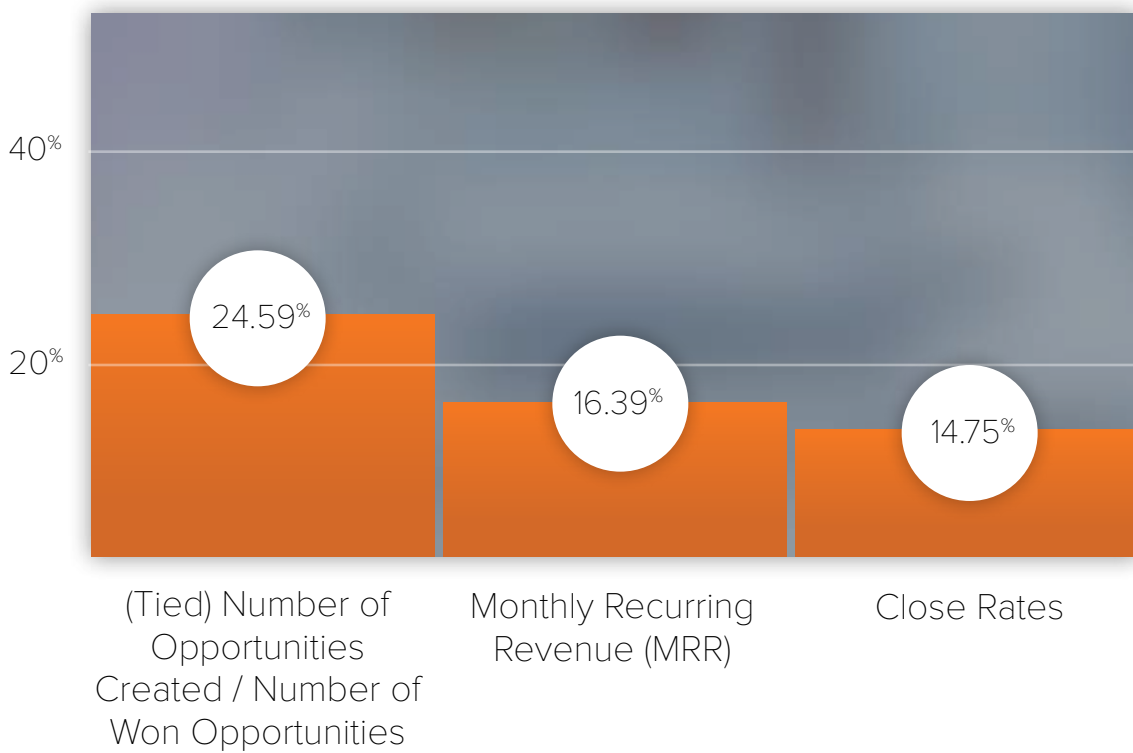
Top Three Metrics Ranked by Sales Management

Bar chart showing:
- Close Rates: 26.32%
- Number of Opportunities Created: 22.81%
- Number of Won Opportunities: 18.42%
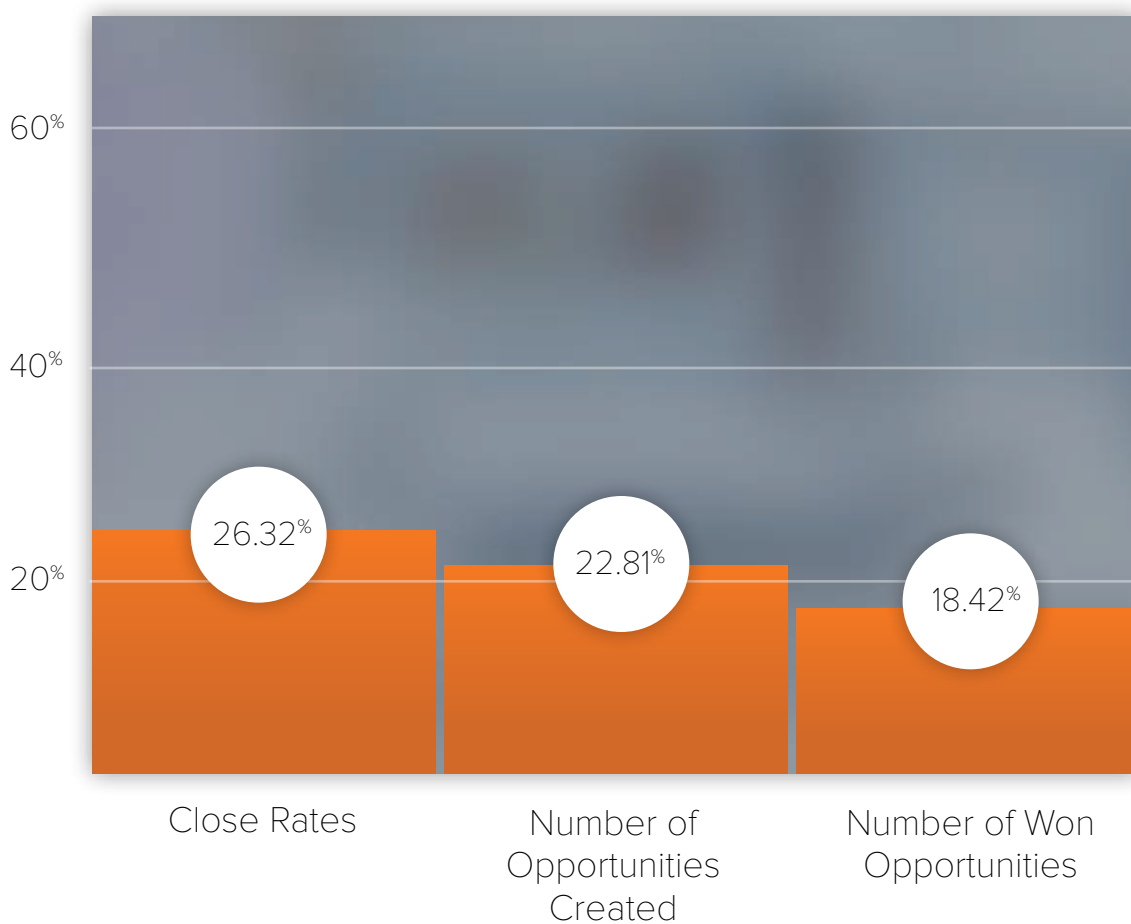
Sales Professionals

Great Sales Professionals are competitive and are driven by the results they produce. Naturally, they want to have the most opportunities possible and they want to win the maximum amount of those opportunities — leading to a tie in both responses. The next most important metric is the monthly recurring revenue, which is the lifeblood of a business.

Top Three Metrics Ranked by Sales Professionals

24.59%	16.39%	14.75%
(Tied) Number of Opportunities Created / Number of Won Opportunities	Monthly Recurring Revenue (MRR)	Close Rates

What is the average length of your sales lifecycle?

What is the average length of your sales lifecycle?

The majority of organizations (around 54%) have a sales lifecycle of 1 to 4 months and just under 20% have an average sales lifecycle of 6 months or more. Under 15% of companies have an average sales lifecycle of less than 1 month.

The longer a sales lifecycle is, the more crucial it becomes to have the right processes in place for Sales Professionals to make the most of their CRM. It becomes increasingly difficult for Sales Professionals to manage and leverage all of their interactions with leads when they aren't using the full functionality of their CRM – which causes a loss in potential sales.

8

Takeaway #8: The majority of businesses have an average sales lifecycle length that requires adequate CRM adoption and usage.

It's important for Sales Management to track their average Sales Lifecycle and identify patterns, such as how many times a lead interacts with a Sales Rep before closing. Longer Sales Lifecycles require a higher investment of resources per lead and leaves less room for low adoption of your CRM. Using Applango, Sales Managers can monitor CRM usage throughout the Sales Lifecycle to ensure qualified leads aren't being forgotten after a few months.

☰ Chapter 9
Conclusion

Conclusion

A CRM, such as what Salesforce and HubSpot offer, is the single most valuable and under-utilized tool that Sales Professionals have today. The two obstacles that limit adoption and usage of CRMs by Sales Professionals are bad processes and lack of training.

Applango provides a useful solution to this problem with their service that monitors activity on Salesforce. Applango helps Sales Managers figure out who is using their CRM and who isn't, where more or better training is needed, and how to increase the ROI of their CRM investment.

Some companies are missing out on the benefits of Inbound Sales completely, by not using a CRM at all. Over half of companies surveyed weren't even using lead nurturing. Startups concerned about costs, or growing companies that want to test out a CRM firsthand, should try HubSpot's CRM. It's free and easy to learn quickly.

Sales teams need to communicate more effectively, as well. The research found distinct disagreements between Management and Sales Professionals on which sales metrics are most important, how to improve CRM usage, and the biggest challenges facing their team.

Once sales teams are on the same page, Salesforce and HubSpot both have intuitive reporting dashboards to keep everyone focused on the same goals. For companies using Salesforce, Applango helps Sales Managers hold their teams accountable for their CRM usage and offers valuable suggestions for remediation.

With these problems solved, companies will benefit from the full functionality of their CRM and operate more efficiently. Most importantly, they'll be able to close more sales.

LOOKING FOR MORE INFORMATION ON SALES ENABLEMENT?

Check Out the Links Below for Some Great Info!

Lack Of Sales Enablement is Killing Your Company
READ ARTICLE ❯

Best Practices for Achieving Salesforce.com Adoption Success
READ ARTICLE ❯

5 Common Reasons Why Your Sales Team is Underperforming
READ ARTICLE ❯

What Is Sales Enablement? [Infographic]
READ ARTICLE ❯

9 Smart Ways to Measure Your Sales Enablement Efforts
READ ARTICLE ❯

14 Tweetworthy Takeaways From Forrester's Sales Enablement Forum
READ ARTICLE ❯

How to Get Sales Reps to Adopt a CRM System in Record Time
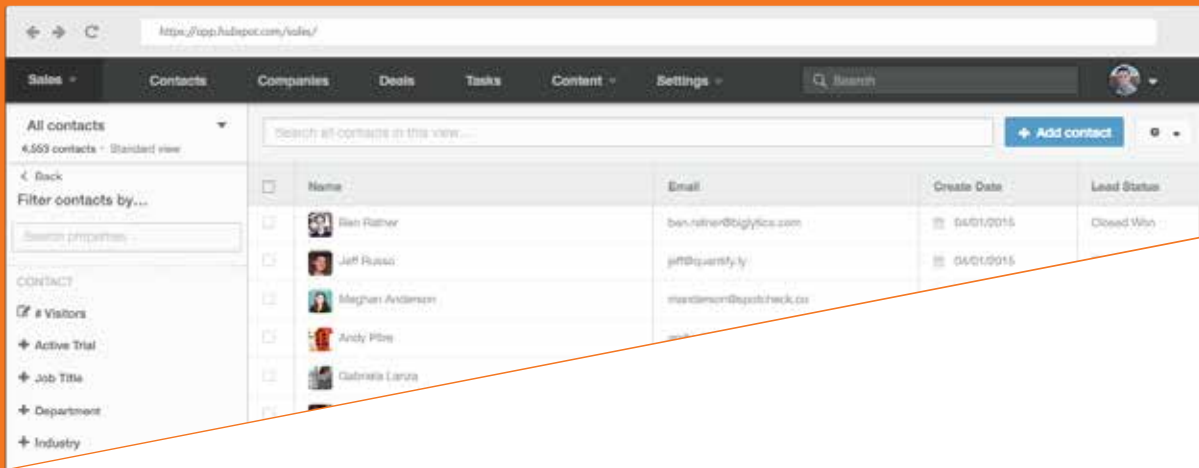READ ARTICLE ❯

3 Ways To Prevent Your Sales Reps From Ever Adopting A CRM
READ ARTICLE ❯

DON'T HAVE A CRM OR LOOKING TO CHANGE?

Give HubSpot's CRM a try for FREE!

GIVE IT A TRY

LOOKING TO GET BETTER DATA ON HOW YOUR TEAM IS USING SALESFORCE?

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GET STARTED