Planning Assumptions 2022: B2B Sales

Accelerating Into Selling's New Era
Contents

Accelerating Into Selling’s New Era  Page 3
Sales Executives: Seize The Moment Through Buyer Understanding  Page 4
Sales Operations: Harness Insights To Fuel Sales Success  Page 8
Chart Your Course To Thrive In The Future Of Sales  Page 11
B2B sales is at an inflection point as socioeconomic shifts, new buying habits, and technological advances transform the way sellers engage with B2B buyers. The pandemic helped accelerate adaptation to these shifts; now, nearly two years after its onset, sales organizations must move beyond adaptation and commit to transformation in the service of better experiences for buyers and sellers.

Achieving this aim is no small feat. Success depends in part on data and insights — both to improve buyer-seller interactions and to enhance internal processes and decision making. It also requires alignment across the revenue engine to deliver an intuitive, connected, and integrated experience for buyers and customers.

This guide explores some of the key trends that will shape the priorities of B2B sales executives and sales operations leaders in the coming year. It also provides action items to help you set a successful course.
To succeed in 2022 and beyond, sales executives need to recognize the opportunity to transform their organizations, or risk finding themselves at a competitive disadvantage.

Today’s B2B buyers are digital-first, and the vast explosion of data available from digital interactions is enabling artificial intelligence (AI) applications to identify and predict which companies, opportunities, and actions are most likely to yield the best outcome. Sales leaders must recognize and act on the implications of these key buyer and technological trends so that their sales teams can sell the way buyers want to buy.

Read on for three of the key trends that sales leaders need to understand and act on in 2022 to help their sales teams sell the way buyers want to buy. Find a summary of the additional content in our full report for sales executives on page 7.
Assumption 1: 
Buyers And Technology Drive Improvements In Experience

Several socioeconomic trends are driving the opportunity for massive sales transformation. These include the rise of Millennials and Gen Zers in decision-making positions; knowledge workers’ preference to continue working remotely; and the increase of digital means for obtaining information and transacting business, which generates data AI can now mine.

These shifts require B2B sales executives to rethink how they create seamless experiences that deliver value to buyers and customers throughout their lifecycle of engagement with the organization. The COVID-19 pandemic accelerated the shift in digital interactions, meaning sales leaders must act now.

RECOMMENDED ACTIONS

• **Automate interactions.** Sales leaders must review every interaction that buyers have with sellers and look for opportunities to automate the components that will drive a better seller or buyer experience. An example is the use of sales engagement technologies to automate early-stage seller interactions and capture data from them. Identify opportunities to leverage AI-driven insights to improve the allocation of resources (including reps’ time), the prioritization of work, and overall seller effectiveness.

• **Personalize interactions.** Use the same AI-driven insights that allow better precision in the use of resources to help sellers personalize their interactions. Ensure sellers have visibility into buyers’ digital interactions so that they can cater their next interaction to the knowledge and content needs of their buyer in that moment. Also give sellers visibility into all members of the buying group by linking all relevant contacts to the opportunity and sharing all interaction information as part of that opportunity data set. Use sales content solutions to automate sellers’ process of finding and personalizing content for buyers.
Assumption 2:  
An Insights-Driven Sales System Is A Key Differentiator

Sales leaders understand the importance of using data to accurately forecast the business. Until recently, though, obtaining the data needed to manage other aspects of the sales system has been difficult. Sales leaders have trusted their instincts on who is the right fit instead of defining a set of competencies for selling success — because capturing the skills and knowledge of sellers and correlating them with results is too hard. Sales leaders can improve the diversity of their workforce by using insights to recruit and select the best candidates and overcome their dependence on referrals to fill roles. Organizational diversity is increasingly important to B2B buyers as they seek companies that exhibit purpose beyond profit.

When captured and analyzed, digital interactions offer insights about all aspects of an organization’s selling system. These include insights about what activities, performed on which opportunity types, lead to the best outcome; clarity on which companies are showing the greatest propensity to buy; and suggestions on what seller activities, and their underlying knowledge and skills, correlate with deal conversion. Sales leaders need to move beyond the traditional reliance on individual sales heroics and embrace an insights-driven sales system that empowers teams to consistently achieve quota and the organization to achieve its overall revenue and growth objectives.

RECOMMENDED ACTIONS

• **Increase precision in market coverage.** Use data and insights to architect the go-to-market strategy and optimize route-to-market selection, direct sales coverage, partner coverage, and sales assignment models. Go beyond total addressable market and use information on purchase probability to inform optimal market coverage.

• **Increase precision in seller execution.** Use data and insights to direct sellers on which opportunities to prioritize and the next best actions to take to move opportunities along. Use insights to identify coaching opportunities to help sellers best interact with buyers.
Assumption 3: It May Be Time To Transform All Your Routes To Market

Most B2B sales leaders need to transform their routes to market (direct and indirect) to accommodate digital sales channels. Yet most organizations are long overdue in reevaluating their overall strategy for reaching, selling to, and supporting customers. Too often, routes to market are ad hoc; they are rarely the result of a conscious, insights-driven design effort. Instead, organizations select them reactively, and over time, they remain frozen due to inertia, fear of disruption, and entrenched industry practices. This laissez-faire approach to route-to-market selection can result in missed sales opportunities, destructive channel conflict, and inefficiencies in resource deployment.

RECOMMENDED ACTIONS

- **Conduct a route-to-market needs analysis.** Use the information collected from the organization's analysis of its target customers to assess what is required from the routes to market to meet company goals and target customers' expectations.

- **Assess existing routes to market.** Apply the output of the needs assessment to existing routes to market to determine whether changes are necessary. For each route to market, consider target customers’ preferences, the route’s effectiveness, and its cost efficiency. Execute changes to existing routes (direct and indirect) to accommodate buyers’ new preferences.

Explore more 2022 Planning Assumptions for B2B Sales Executives in our client report, including:

- **The essential role of e-commerce.** Many sales leaders still view e-commerce as a marketing initiative and continue to gravitate toward old-school offline selling motions. Yet buyer needs continue to evolve away from these models — and sales organizations that ignore e-commerce do so at their own peril.

- **A connected revenue process is fundamental.** Organizations must seamlessly align prospect, buyer, and customer experiences by fully connecting the underlying product, marketing, sales, implementation, and customer success functions. Data and insights from buyer interactions should be shared across the revenue engine.

Contact us to learn how to access the full report.
B2B sales and revenue operations leaders face major changes as the purchasing process becomes more complex. Forrester’s 2021 B2B Buying Study revealed that the average number of buying interactions involved in a purchase jumped by 10 interactions from 17 in 2019 to 27 in 2021.

Buying groups, as opposed to individual buyers, have become the norm — more than 80% of purchases involve three or more people across two or more departments.

Effective management of the buyer’s journey and customer lifecycle and deft use of insights to prioritize selling efforts are critical to success in the fast-changing sales environment. Read on for two of the top trends that will shape sales and revenue operations leaders’ priorities in 2022. Find a summary of the additional content in our full report for sales operations leaders on page 10.
Revenue operations continues to gain prominence as an organizing structure for B2B organizations that seek to establish a holistic, end-to-end approach to managing the buyer’s journey and customer lifecycle across the revenue engine. Nine in 10 operations decision-makers say their organization has some form of revenue operations capability, and 40% of those decision-makers have already implemented a centralized revenue operations function, Forrester data shows. Yet starting the transition to revenue operations by focusing only on organizational design is a path to failure.

Executives need first to agree on the problems the revenue operations function is designed to solve, then clearly define the scope of the proposed organization. Common challenges include misalignment of performance metrics and analysis, lack of cross-functional data management and governance, and lack of clarity for customer-facing processes. The next step is to identify the functional expertise needed to address the problems and any constraints that should be applied to organization design to determine if a centralized revenue operations approach can deliver the required improvements.

**RECOMMENDED ACTION**

- **Avoid rushing to the organizational design step when considering a revenue operations function.**
  Instead, start by gaining alignment on the goals, benefits, and constraints involved. Consider piloting a revenue operations function that is aligned on two or three clearly defined business outcomes. Also consider the organization’s ability to drive greater collaboration, accountability, and interdependencies across the entire revenue engine — that will help improve customer experience and efficiency for internal stakeholders.
Assumption 2: Deep Insights Inform Account Targeting And Territory Design

Sales coverage models, including assigned accounts and territories, are often created using prior years’ results but fail to take into consideration data and insights into high-potential accounts or propensity to buy during the coming year. The result is wasted sales and marketing efforts focused on accounts with a low probability of converting to customers.

High-performing organizations combine predictive analysis of the ideal customer profile (ICP) with improved visibility into the B2B buyer’s digital journey. Sales and marketing can collect extensive market and customer data, which can be analyzed to identify high-potential prospects as well as growth opportunities within existing accounts. Guided by a deep understanding of account and opportunity potential, sales and marketing can align on target buyers, identify when those buyers are in an active buying cycle, and determine the optimal coverage strategy. This improves the efficiency and effectiveness of the sales organization while maximizing individual sellers’ productivity and ability to achieve quota.

RECOMMENDED ACTION

- Include ICP and propensity-to-buy analysis as a specific step in the annual planning process. Use the insights derived from this analysis to improve account assignment, territory design, and quota allocation. Collaborate with marketing to acquire and leverage third-party data providers to source, integrate, and analyze the required market data.

Explore more 2022 Planning Assumptions for sales operations leaders in our client report, including:

- **Account for multiple opportunity types.** Consider retention and growth opportunities with existing customers as well as focusing on new accounts.

- **Take a broader perspective to revenue-engine technology.** Deploy and leverage technology that captures a wide range of buyer, customer, and seller data, then turns that data into reliable insights that increase sales effectiveness.

- **Provide reps, managers, and stakeholders with actionable insights.** From report creation and ad hoc analytics to delivering actionable insights that enable better business decisions.

Contact us to learn how to access the full report.
For B2B sales organizations, the pandemic accelerated many critical shifts. Success in 2022 and beyond will require an unwavering focus on buyers and customers and a commitment to approaches that deliver on their growing expectations. Sales executives and sales operations leaders set the tone in orienting the sales organization around the buyer and implementing tools and processes that advance a buyer-centric vision while improving seller productivity. Teams that effectively harness insights to uplevel buyer-seller interactions and improve seller productivity will thrive in 2022 and beyond.

As you make your plans for the year ahead, look to Forrester to support and advance your vision and help you anticipate change and excel. Reach out to learn how you can access our full Planning Assumptions 2022 reports for B2B sales executives, sales operations, sales enablement, and other functional areas.

**ADDITIONAL RESOURCES**


To Succeed In B2B Sales, Talent Alone Won’t Cut It

Driving Revenue Growth: Reach Next-Level Revenue Engine Performance

Introducing The Insights-Driven Targeting Spectrum (client access only)
Build A Resilient, Future-Ready Sales Organization

No matter where your sales organization is in its journey to becoming truly insight driven and buyer led, Forrester can help. We partner with sales executives and sales functional leaders to provide research-based insights, curated tools, and hands-on guidance to help you meet modern buyers’ expectations, shorten sales cycles, and drive repeatable revenue growth. Explore our Forrester Decisions services for sales:

- Forrester Decisions for B2B Sales Executives
- Forrester Decisions for Sales Operations
- Forrester Decisions for Sales Enablement

EXPLORE MORE PLANNING ASSUMPTIONS 2022 CONTENT:
Visit the hub to read our B2B marketing guide and blog posts from across B2B sales, marketing, product, and more.

GET IN TOUCH

FOLLOW FORRESTER

© 2021 Forrester Research, Inc. All Rights Reserved.