

OCTOBER 2020

# HubSpot Research Global Sales Enablement Survey

How modern sales leaders are exceeding revenue targets by adapting their sales model, leveraging technology, and enabling their reps to sell remotely.

And why everyone else is catching up.

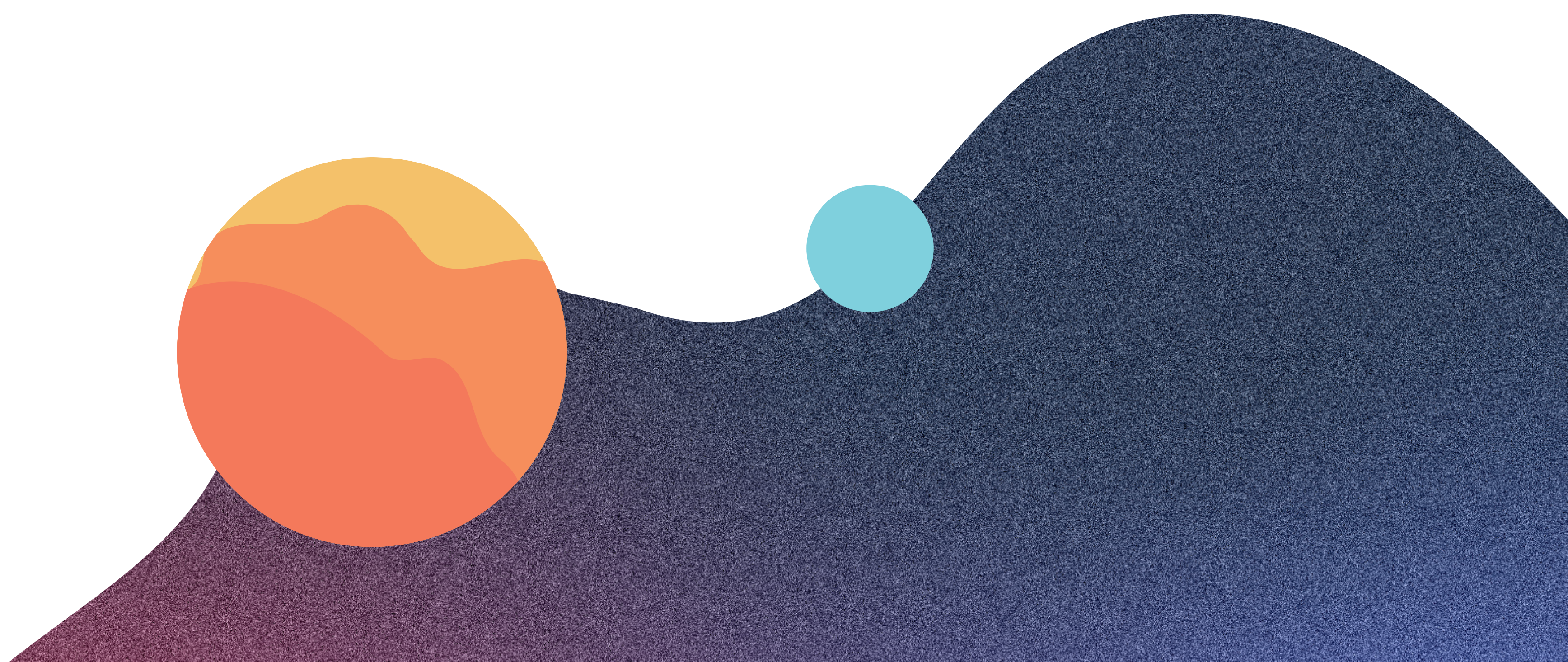




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# Executive Summary

Sales leaders, we don't need to tell you how transformative this year has been, but, wow.

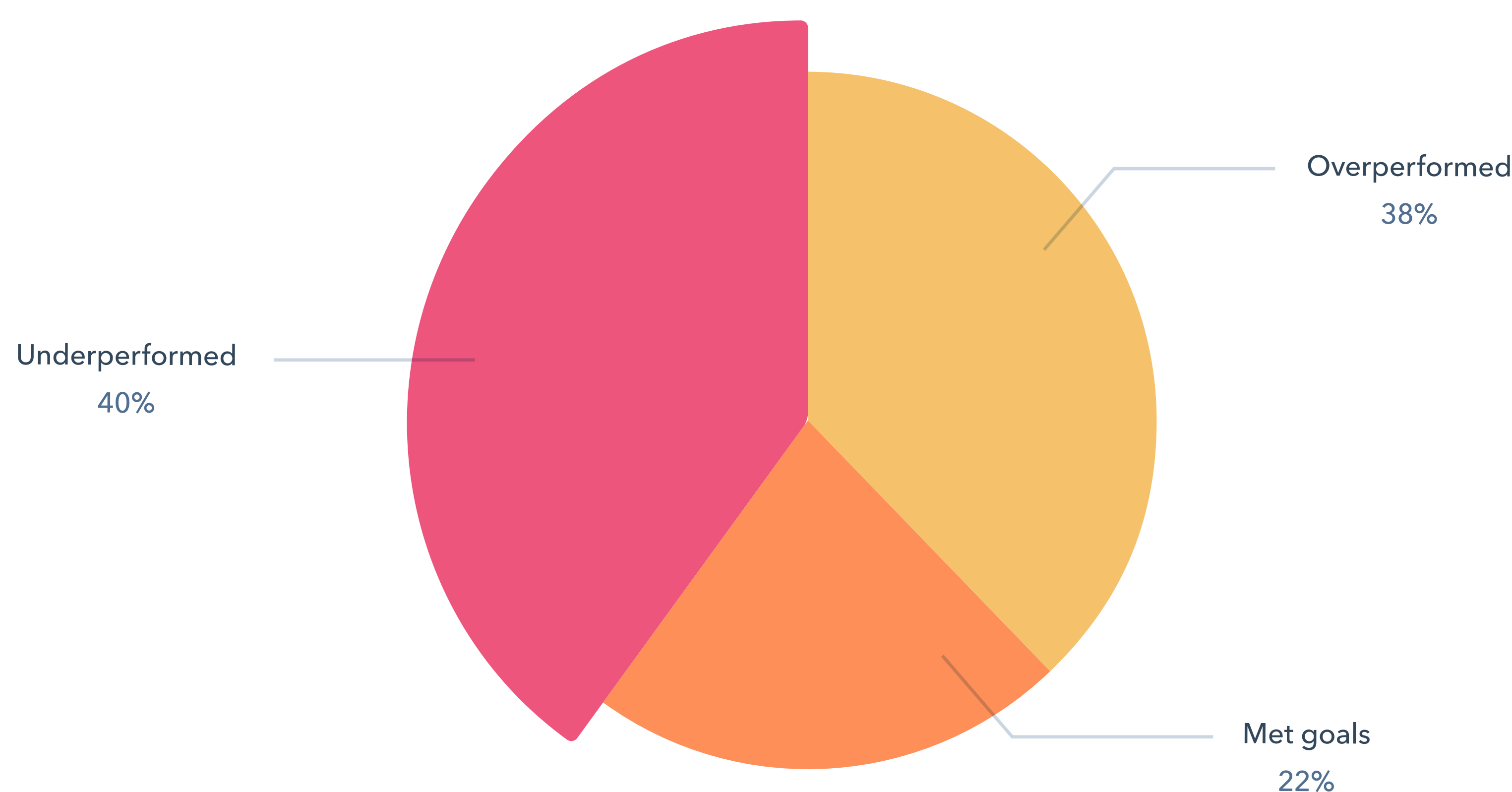
What a year.

It's impossible to talk about next year without acknowledging the change that this year catalyzed.

Your sales reps are being asked to sell from anywhere: Conducting outreach and closing deals by phone, and new channels like video and online chat. Your managers are being asked to coach and enable remote teams: Finding new ways to motivate reps and improve productivity. And you need to adapt your sales organization's operating model to enable all of these changes in order to hit revenue targets, all while planning for the year ahead.

In this new environment, growth is a tough topic to broach with many sales leaders. While some businesses have seen accelerated growth this year, many have not. In fact, 40% of businesses surveyed for this report will miss revenue targets in 2020.

How has your entire organization performed against its revenue goal this year? Please select one.



Source: HubSpot Research, Global Survey, Sep-Oct 2020

The word of the year for many is not growth, but survival. However, every era of change offers an opportunity to find a growth advantage. It's time to reevaluate our approach to selling.

We surveyed over 500 sales leaders across eight countries to understand what changes sales leaders are making to enable their teams to hit and exceed revenue targets.



Here are the three areas where they are finding a competitive advantage.

## Key Findings

**Sales leaders who adopted a hybrid or fully remote sales model hit or exceeded revenue targets.** Sales leaders whose teams typically sold in the field faced a hard choice this year: Do I subject my team to massive change and enable remote work, or try to weather this storm? Those who invested in enabling remote work were rewarded--64% of those who transitioned to remote sales this year met or exceeded revenue targets, compared to 50% of the leaders who did not make the transition. Signaling a shift in how sales teams will be structured going forward.

**A dedicated sales enablement team is critical to the success of the future sales organization.** 65% of sales leaders that outperformed against revenue targets have a dedicated sales enablement person or team. Sales enablement is no longer a center for rep support, but a proactive team that improves sales productivity. With a partially or fully remote sales force, the sales enablement function is critical for arming reps and managers with the tools, technology, reports, and content needed to sell more effectively.

**High performing sales teams automate sales tasks and leverage competitive data.** Most sales leaders we surveyed, regardless of performance, ranked CRMs and videoconferencing software as the most important tools for remote selling. The difference between overperforming and underperforming sales leaders is how they use the tools. 61% of overperforming leaders use their CRM to automate parts of their sales process, vs. 46% of underperforming leaders. By automating parts of their sales process, sales leaders free up rep time to focus on selling.

**"In 2020, 40% of businesses did not meet revenue targets. As you plan your 2021 and beyond, sharpen your focus on your customer. Place them at the center of every decision, across marketing, sales and customer success."**

YAMINI RANGAN  
Chief Customer Officer





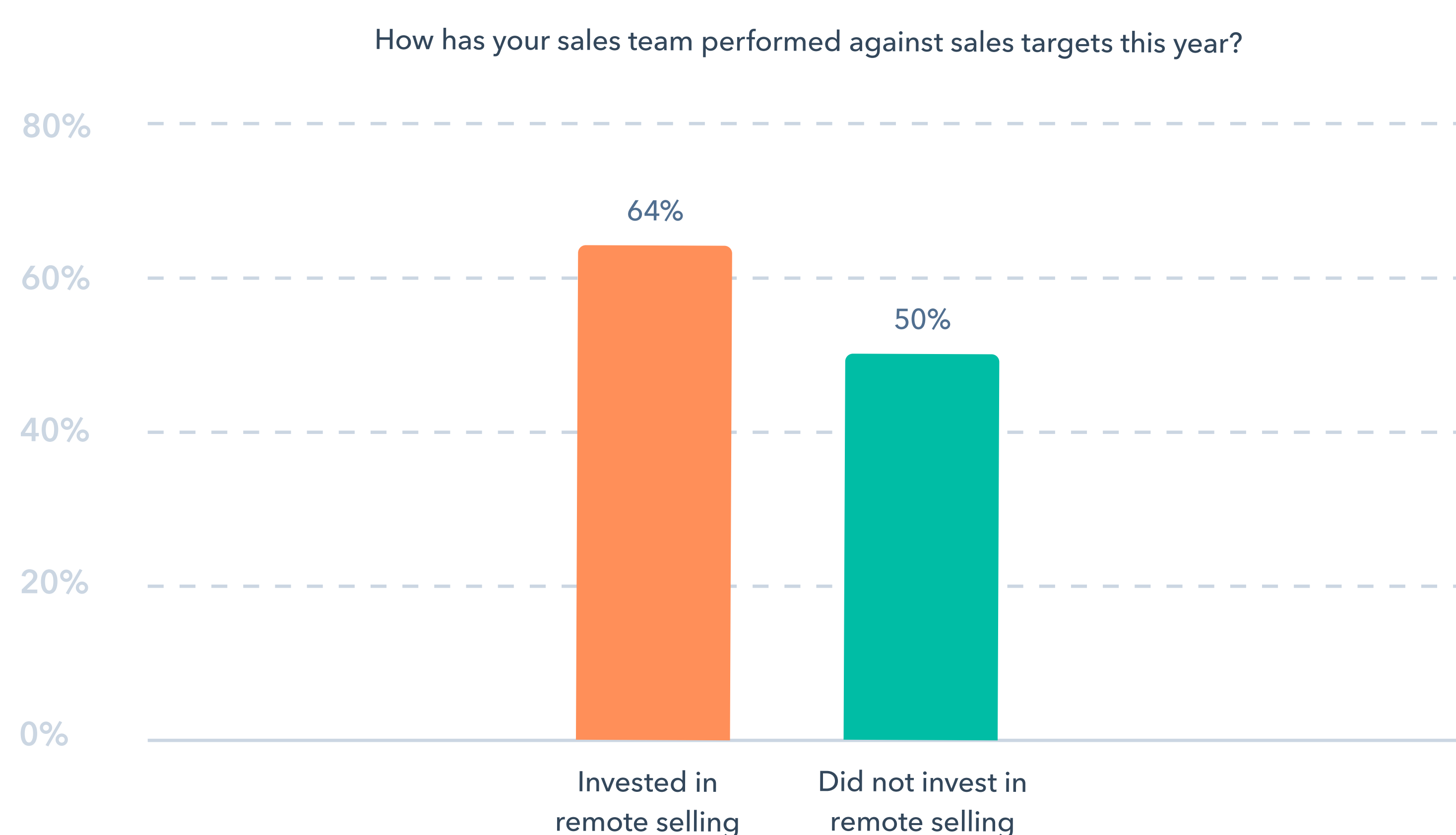
# The Adoption of Remote Selling Is Creating a Competitive Advantage

Traditionally, sales organizations had a clear decision to make on their model for selling: Choosing between a field or inside sales model. Inside sales reps often sell remotely, while field sales reps travel, brokering face-to-face deals.<sup>1</sup>

As buyers' preferences for how they like to buy have changed, sales organizations have adopted hybrid models. More teams are selling both in person and remotely to meet buyers' needs.

COVID-19 has had a significant effect on buyer behavior, and the economy has forced difficult decisions for sales leaders. Many sales organizations have been forced to operate remotely. Reps need to become more creative as buying habits have changed, managers are being asked to find new ways to improve seller productivity, and leaders are being asked to drive growth through uncertainty.

However, leaders who adapted quickly and invested in enabling remote selling were rewarded. 64% of sales leaders who invested in remote selling met or exceeded revenue targets this year.



Source: HubSpot Research, Global Survey, Sep-Oct 2020

<sup>1</sup> "Inside Sales vs. Outside Sales: How to Structure a Sales Team." 7 Apr. 2020, <https://blog.hubspot.com/sales/inside-vs-outside-sales>. Accessed 19 Oct. 2020.



Sales leaders who did not invest in remote selling fell behind. 50% of this subgroup did not hit their sales targets this year.

But what kind of impact does missing sales targets actually have on future priorities?

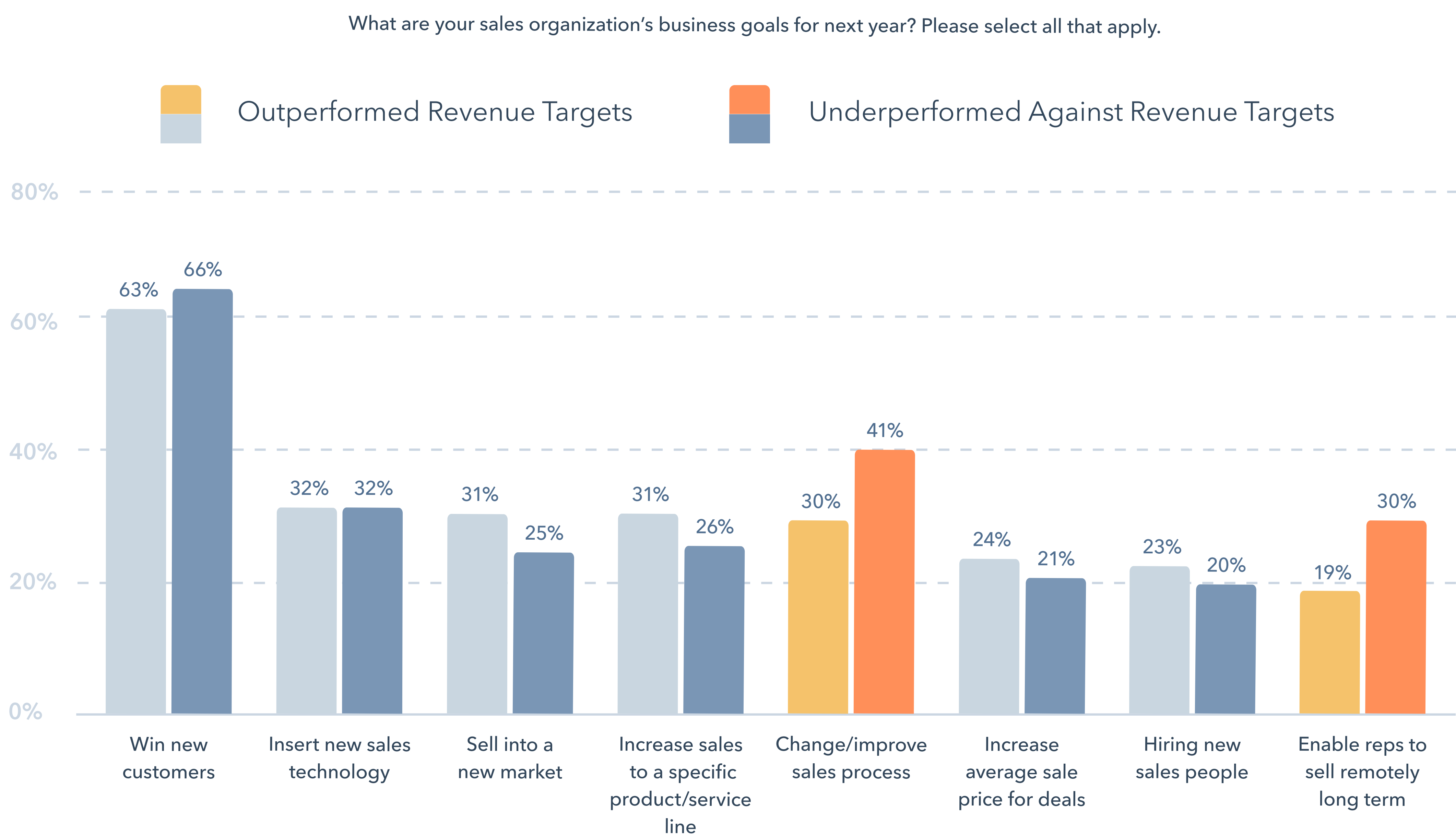
Looking ahead, sales leaders were asked, “what are your sales organization’s goals next year? And based on their responses, the impact is clear: There is a competitive gap forming between those who have and haven’t invested in remote sales.

## Successful Sales Leaders are Focused on Growth

Those who exceeded revenue targets this year are focused on winning new customers, selling into new markets, and increasing sales to a product/service line in the new year.

## Those Who Missed Targets are Catching Up

Those who underperformed against targets this year are focused on winning new customers, improving sales processes, and enabling reps to sell remotely long term.

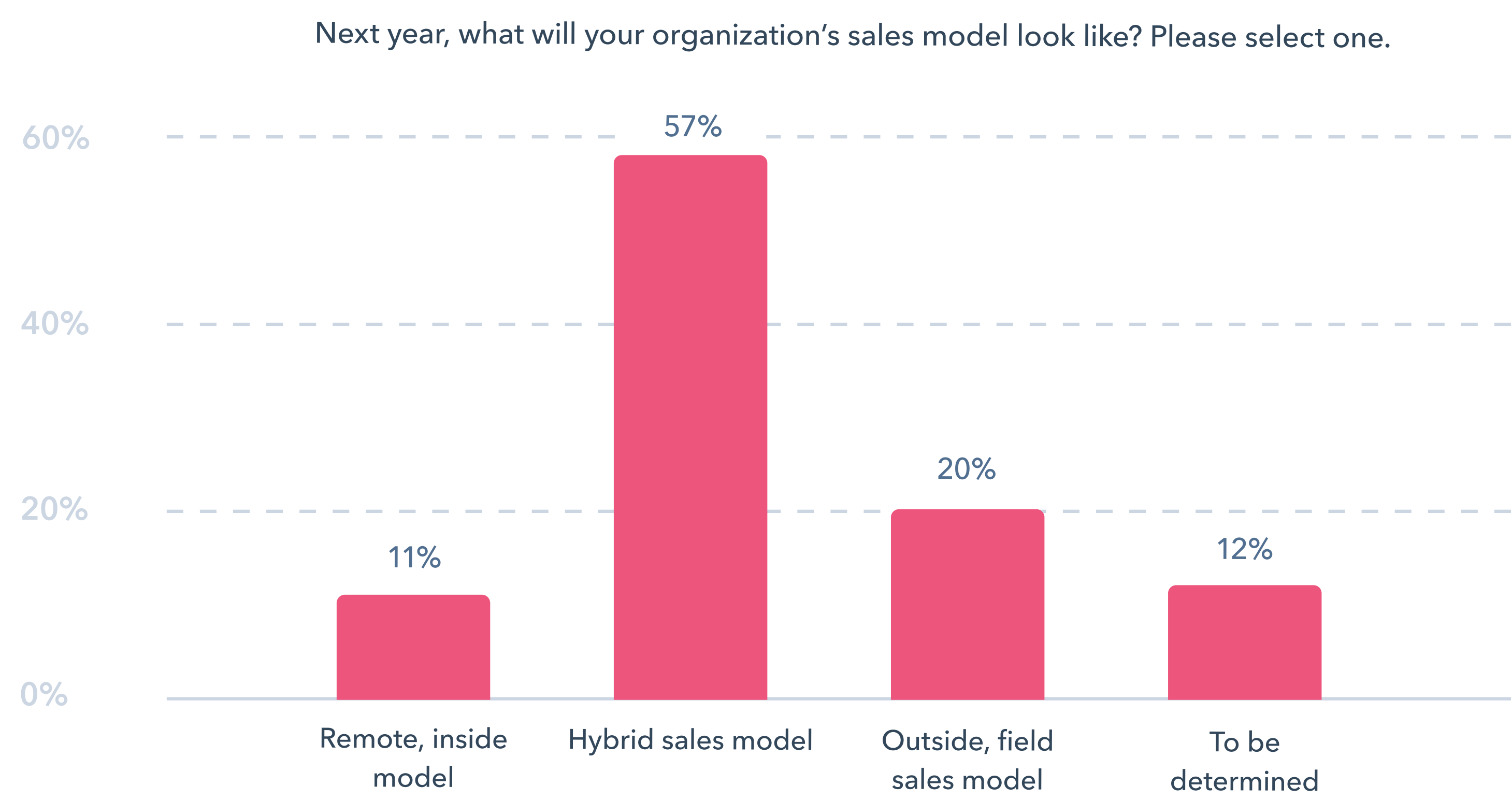


Source: HubSpot Research, Global Survey, Sep-Oct 2020



Sales leaders who overperformed against revenue targets this year adapted processes and remote enablement swiftly, allowing them to focus on growth in the new year. Investing in this level of change in the middle of a pandemic was likely difficult work in the short-term, but it opens expansion opportunities in the long term. Meanwhile, those who struggled are doubling back to work on process and remote enablement next year, which could widen the competitive gap we mentioned.

Regardless, as more sales organizations enable reps to sell remotely, their foundational sales model will change. As our data shows, a commitment to a hybrid or remote sales model can help businesses grow. Sales Leaders are seeing this and incorporating this shift into plans for next year's sales model. Next year, 68% of sales leaders plan to implement a hybrid or fully remote sales model.



Source: HubSpot Research, Global Survey, Sep-Oct 2020



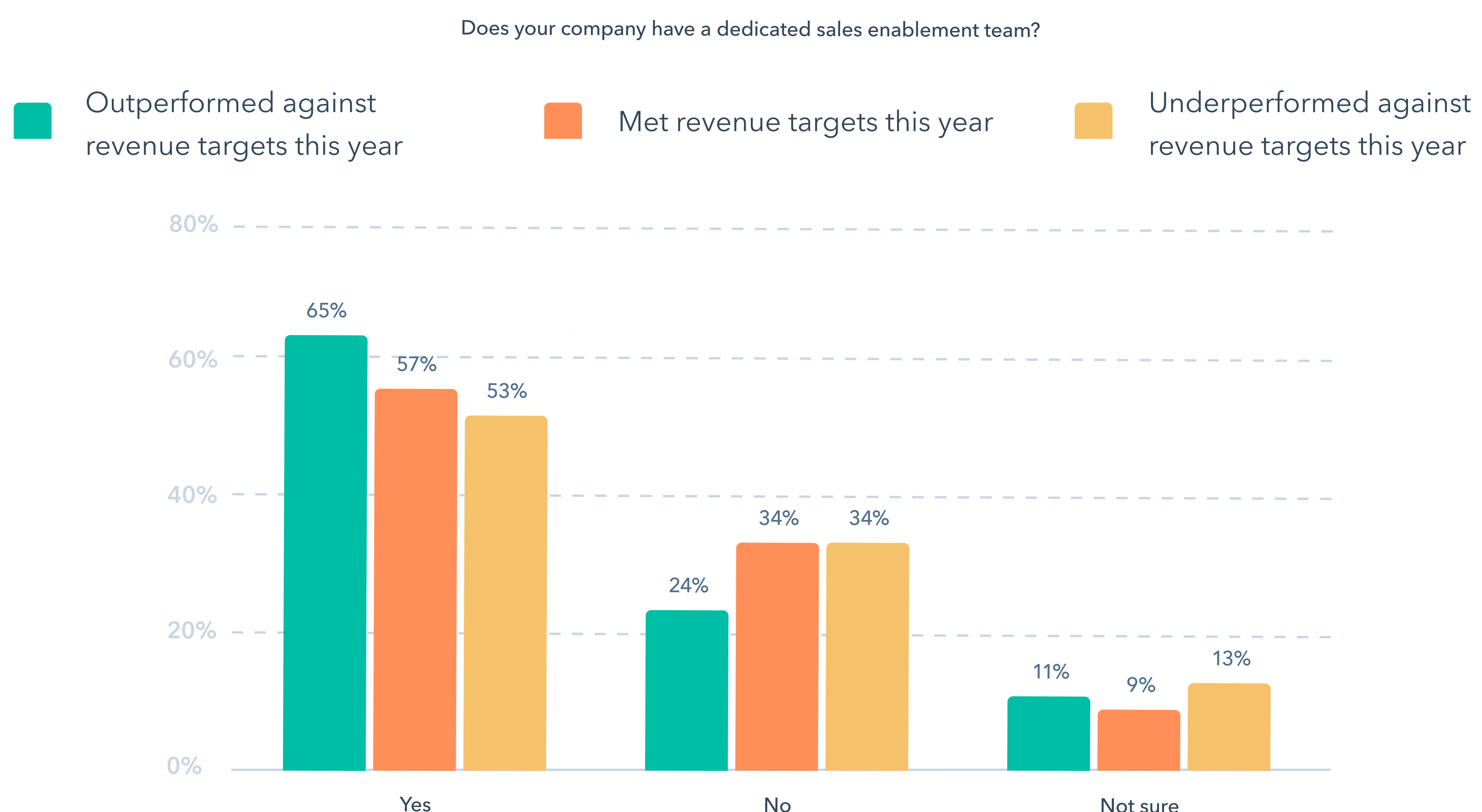
# Dedicated Sales Enablement Teams are Critical to the Success of Sales Organizations

In a world where sales organizations are being forced to shift to remote selling, there is no overstating how important sales enablement is to a team's success. It's mission critical.

In periods of great change, successful sales leaders need to keep their reps focused. This means minimizing time spent away from revenue generating activities. For many, transitioning to a remote sales model is a period of great change and successful sales leaders made two major investments to keep reps focused -- a dedicated sales enablement team and data-backed coaching.

Of the all the sales leaders surveyed, 59% have a dedicated sales enablement team or person. This means dedicated headcount - they don't roll sales enablement into the responsibilities of their sales managers or their marketing team.

If we dive deeper into the survey responses, 65% of sales leaders who outperformed revenue targets have a dedicated sales enablement person or team, highlighting how an investment in a sales enablement team can lead to revenue growth, especially during periods of great change.



Source: HubSpot Research, Global Survey, Sep-Oct 2020

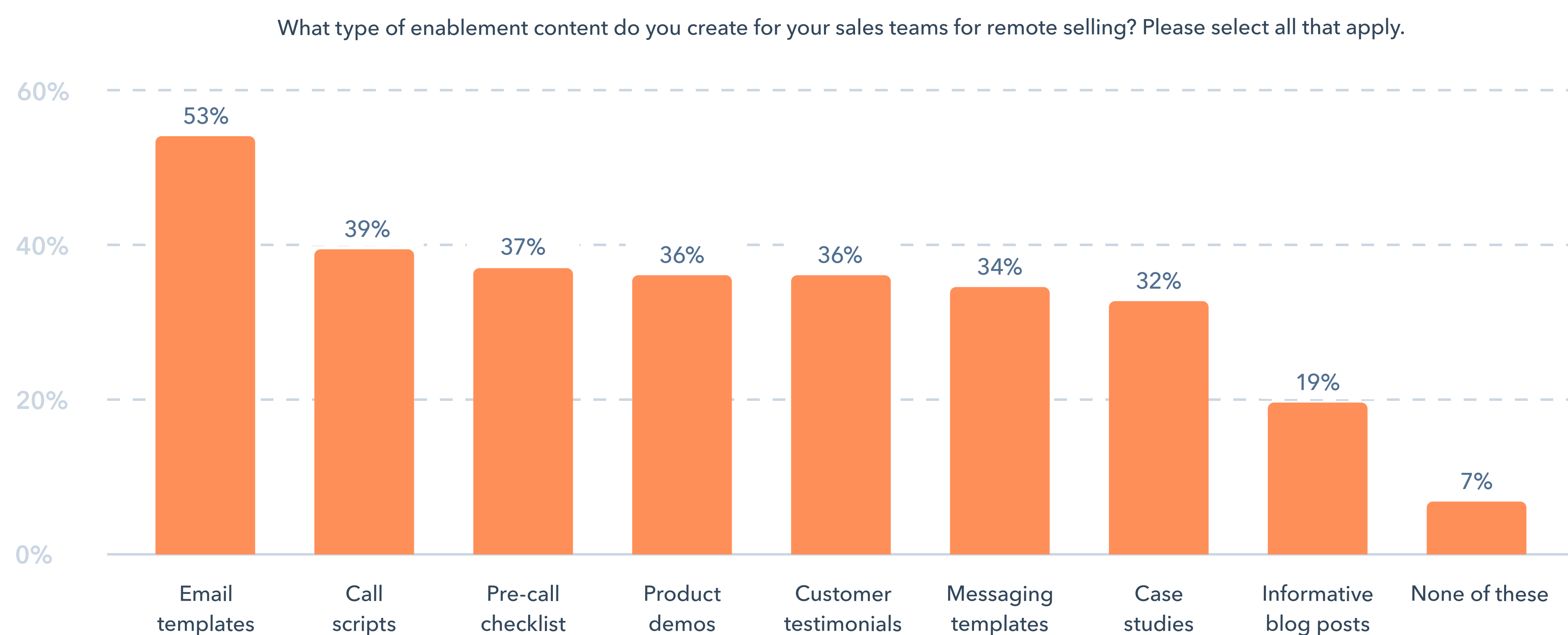


**"**The single most underutilized resource in any company is the sales leader. As we look forward to 2021 all sales leaders should be asking themselves how they are aligning themselves to ensure they are most efficiently managing their teams.**"**

**SUZIE ANDREWS**  
Sandler Training



Sales Enablement, like the rest of the world, is changing. In traditional sales organizations, enablement is tasked with creating materials for the team. Survey respondents shared that they prioritize creating email templates for rep outreach, call scripts, and pre-call checklists.



Source: HubSpot Research, Global Survey, Sep-Oct 2020

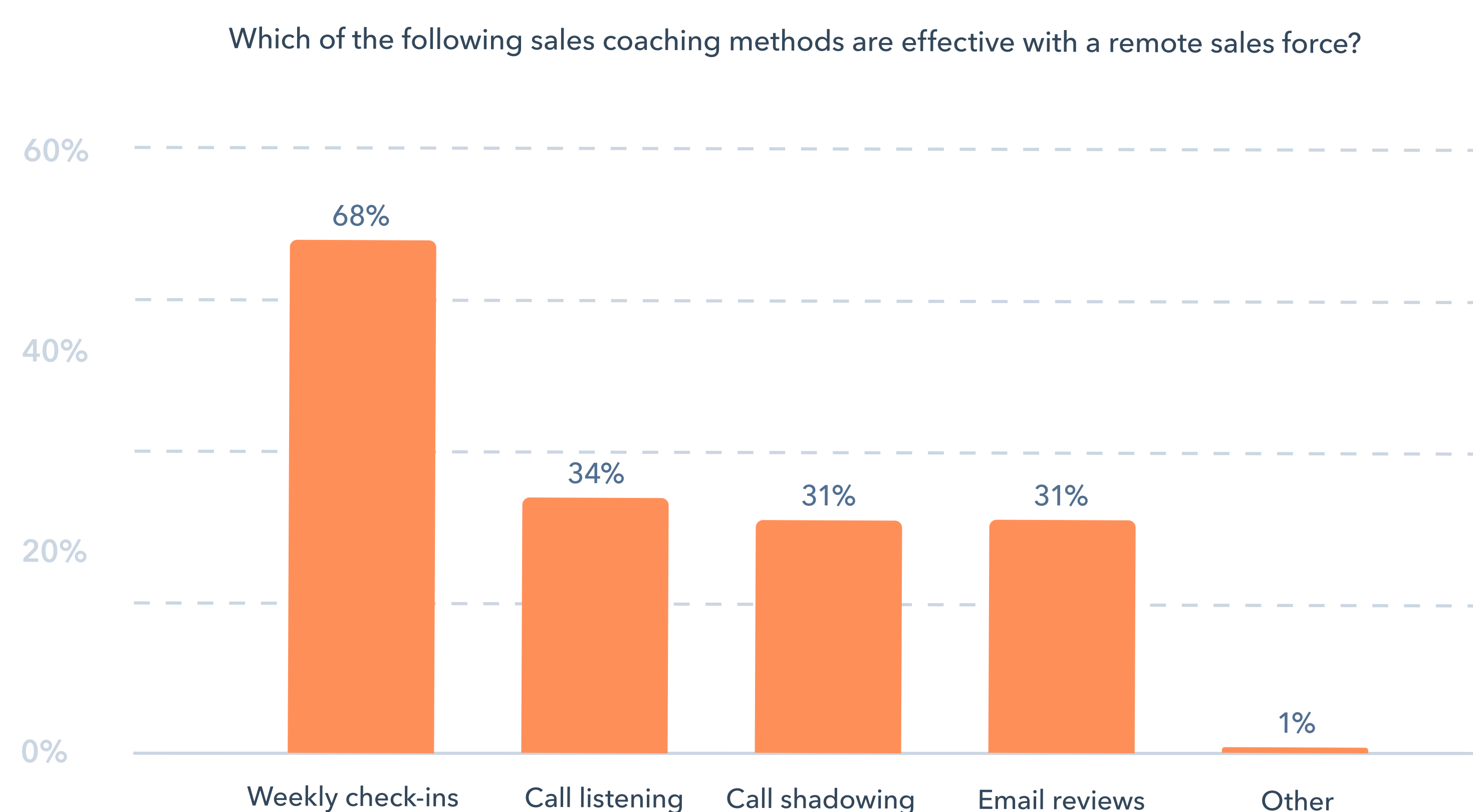


However, modern sales organizations are transforming their enablement function.

In addition to creating supporting materials, enablement is being asked to evaluate and roll-out tools and technology to improve rep training, coaching, and team productivity.

The tools that enablement chooses aren't only useful for saving reps time. Sales leaders and managers can leverage data, like email open rates and call recordings, to identify high-impact coaching opportunities to make check-ins more valuable.

They are then leveraging this data and actively coaching their teams through weekly check-ins, the most common sales coaching method among leaders.



Source: HubSpot Research, Global Survey, Sep-Oct 2020

“As teams shift to full-time remote work, providing sellers with the tools and structure needed to stay disciplined in their sales processes will be crucial to an organization’s growth.”

CHRIS POPE  
Director of Sales





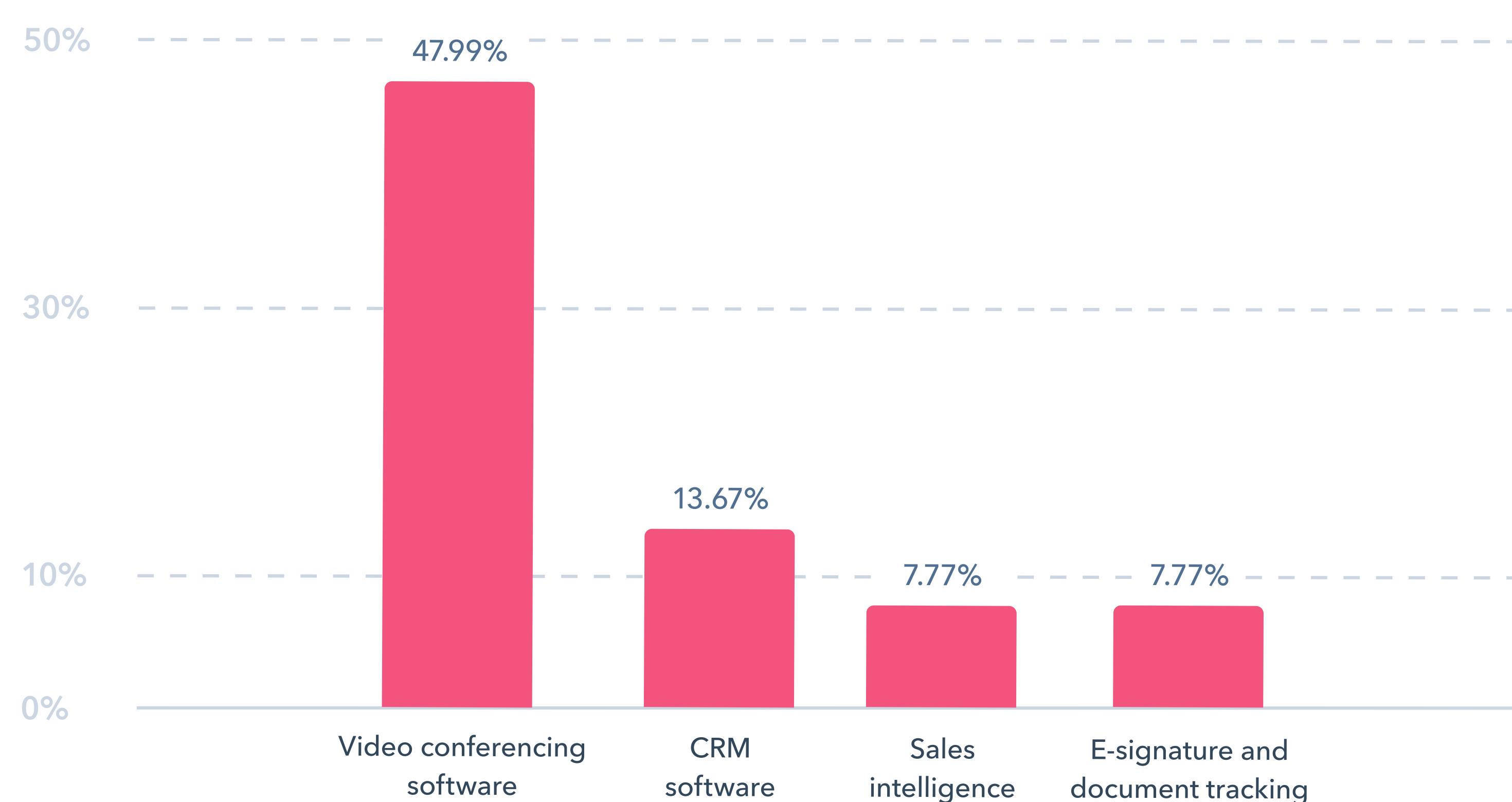
# Sellers Leveraging Automation and Competitive Data Have an Edge

Strong sales leaders know that to transform their organization they need to enable their people, create new processes, and leverage technology.

For the past few years, sales technology – including sales intelligence and CRM tools – has become an integral part of the sales process among top-performing organizations.<sup>2</sup>

This year dramatically shifted the way reps had to sell, and, because of that, sales leaders had to enable their teams with new tools.

Of the leaders who transitioned their team to a remote selling model, it won't come as a surprise that they ranked "video conferencing software" as the most important tool to their team's success, with a CRM taking second place.



Source: HubSpot Research, Global Survey, Sep-Oct 2020

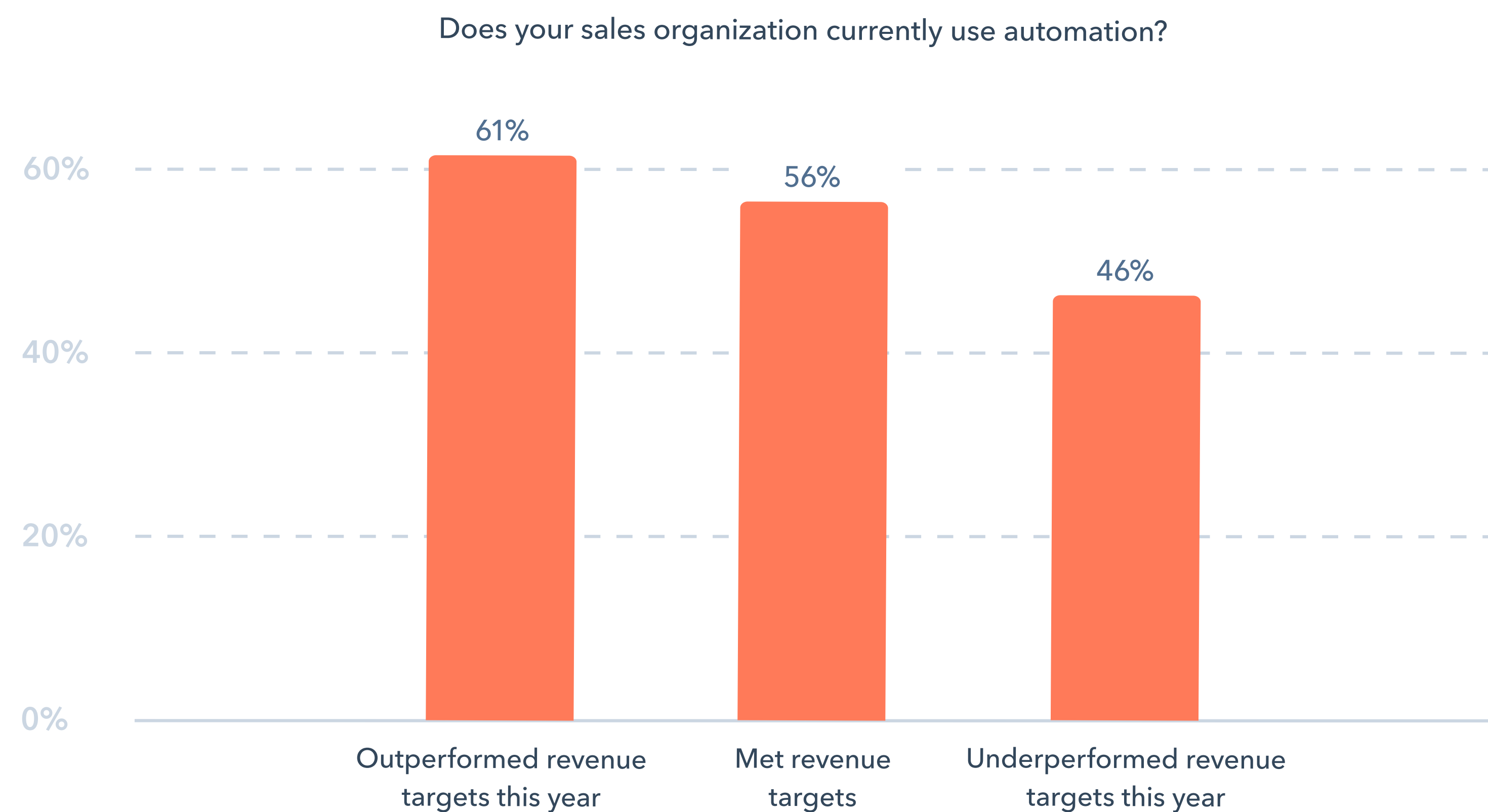
More interesting, however, was that a CRM was ranked as the first or second-most important tool for all sales leaders, regardless of performance this year.

The main difference between the overperforming and underperforming teams was tool usage: While the adoption of sales technology is a strong first step, the automation of processes is how leaders are driving growth.

<sup>2</sup> "The State of Sales, at Arm's Reach: Download the Pocket Guide." 29 Sep. 2020, <https://www.linkedin.com/business/sales/blog/b2b-sales/the-state-of-sales-at-arms-reach-download-the-pocke-guide>. Accessed 20 Oct. 2020.



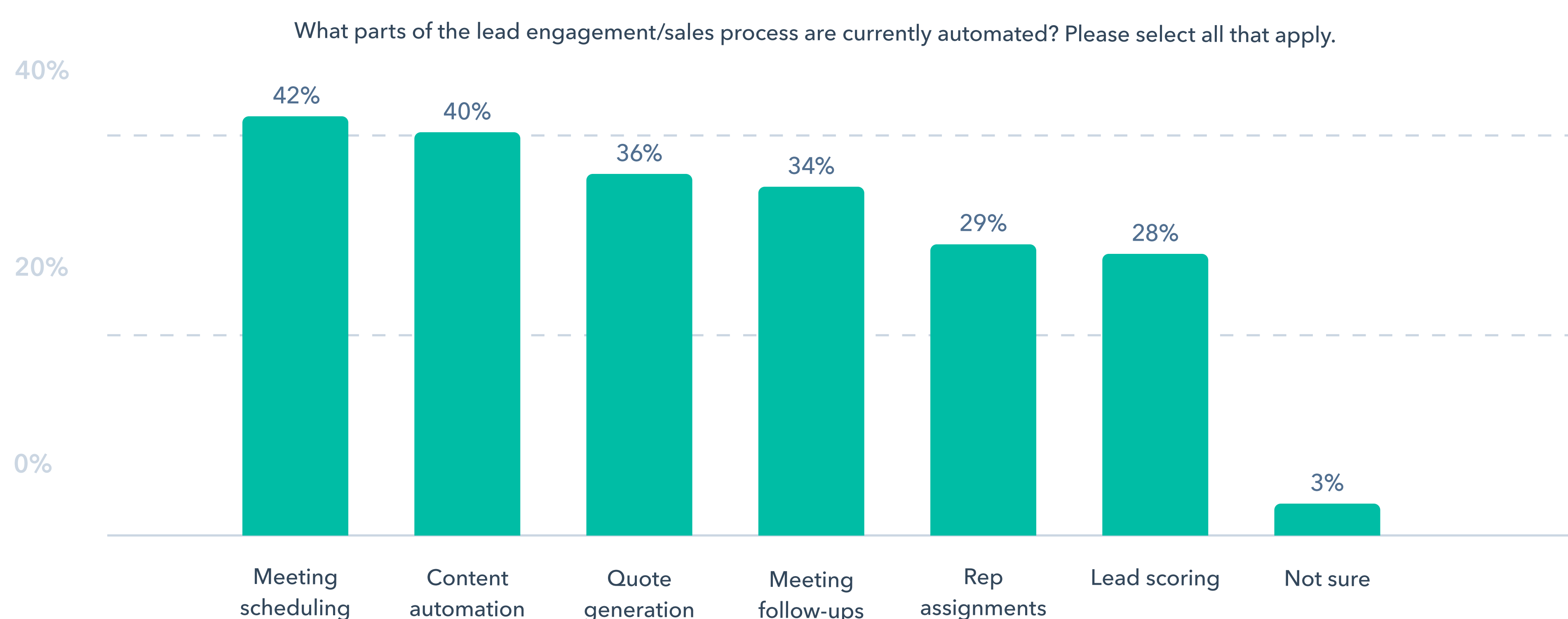
As you will see below, a majority of respondents who are exceeding revenue targets use automation as a part of their sales process, while respondents who missed revenue targets are less likely to have adopted automation.



Source: HubSpot Research, Global Survey, Sep-Oct 2020

Leaders who are overperforming understand that automation improves rep productivity. But there are a lot of moving parts in a sales process, so which activities are most sales leaders trying to automate first?

Teams using a CRM are automating tasks such as meeting scheduling, content delivery, and contract generation. They're no longer asking reps to perform these as manual activities, wasting valuable time and money.



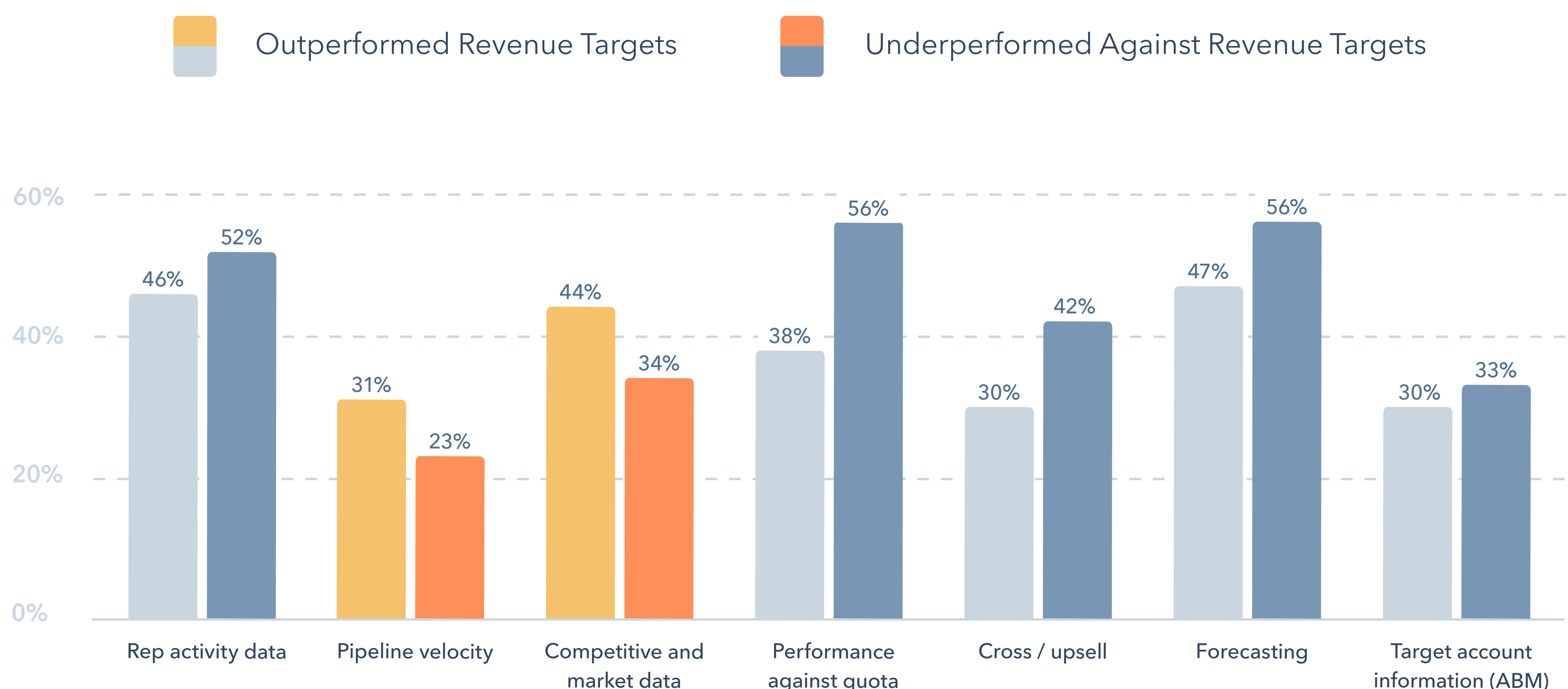
Source: HubSpot Research, Global Survey, Sep-Oct 2020



In addition to automating rep tasks, successful sales leaders are leveraging data from their CRM to make strategic decisions. Regardless of performance against revenue targets, a majority of survey respondents are looking at forecasting reports, performance against quota, and rep activity.

However, those who actively gather and review competitive intelligence and market data are meeting or exceeding revenue targets. 44% of sales leaders who will exceed revenue this year use competitive intelligence and market data. Additionally, high-performing sales leaders are focused on improving pipeline velocity, further demonstrating sales leaders' focus on process improvements.

Which data and insights from your sales analytics tool are most important to strategic business decisions?



Source: HubSpot Research, Global Survey, Sep-Oct 2020

“The efficacy of our historical data was overturned when COVID hit in Q2 2020. Everything in the sales process as we know it changed, from buyer expectations to sales motions, increasing uncertainty for revenue teams.”

ANNELIES HUSMANN  
Director, Enterprise Sales





# Additional Findings

*Next year, what will your organization's sales model look like?*

Sales models are changing. 68% of sales leaders surveyed are adopting a remote or hybrid sales model next year.

*How effective have virtual meetings compared to face to face meetings (in terms of moving to the next deal or pipeline stage)?*

63% of sales leaders believe that virtual meetings are just as or more effective than in-person meetings.

*Which data insights from your sales analytics tool are most important for strategic business decisions?*

When sales leaders have sales analytics tools to leverage, they use forecasting data, rep productivity/activity data, and team performance against quota to make strategic business decisions next year.

**“** It is fairly easy to see that remote productivity is felt to be higher than previously thought or expected, while simultaneously more efficient. With the dawn of new technology and software, it would seem as if we have been unknowingly preparing for the pandemic since the dawn of the digital age. **”**

**BRYAN ELSESSER**  
Sr. Director of Sales





*What aspects of the buyers' sales experience are you hoping to improve next year?*

The leaders who outperformed this year are doubling down on improving digital buying channels, like chat, next year.

*“As the world shifts to virtual, the challenge is building trust with your prospects and cutting through the noise. Our own research at LinkedIn shows that sales professionals can build trust by taking a buyer-first approach and by reaching out only when they fully understand the buyers' needs and the buyer's role in the purchasing process.”*



ALYSSA MERWIN  
VP of Sales, North America











# Global Survey Demographics

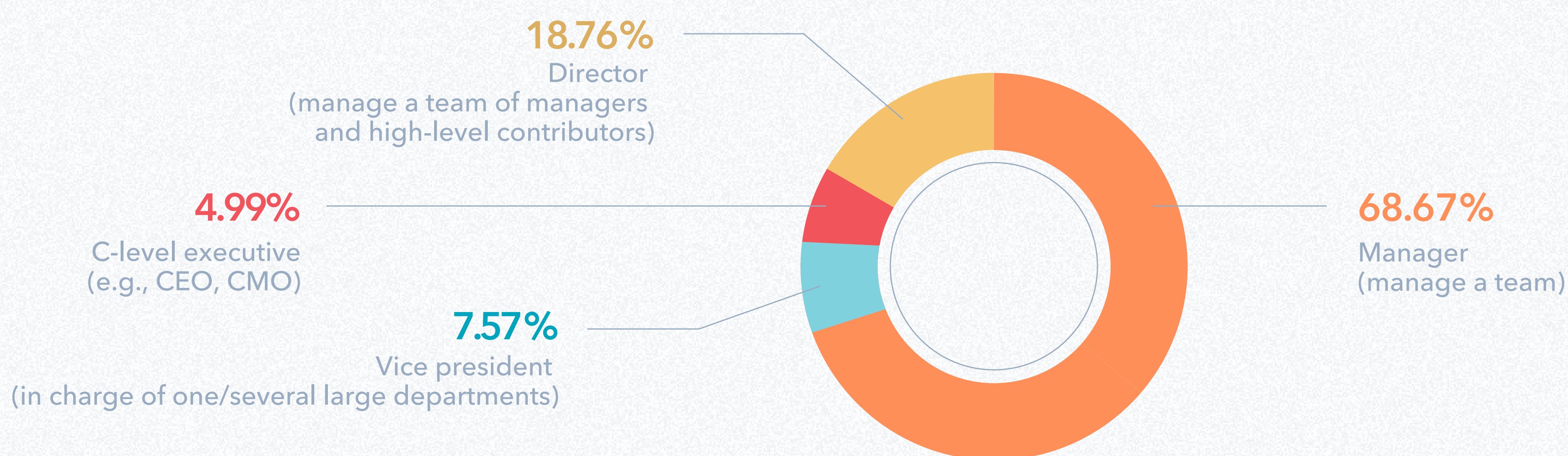
## Regions Represented

-  Australia
-  France
-  Germany
-  United Kingdom
-  Canada
-  Spain
-  Japan
-  United States

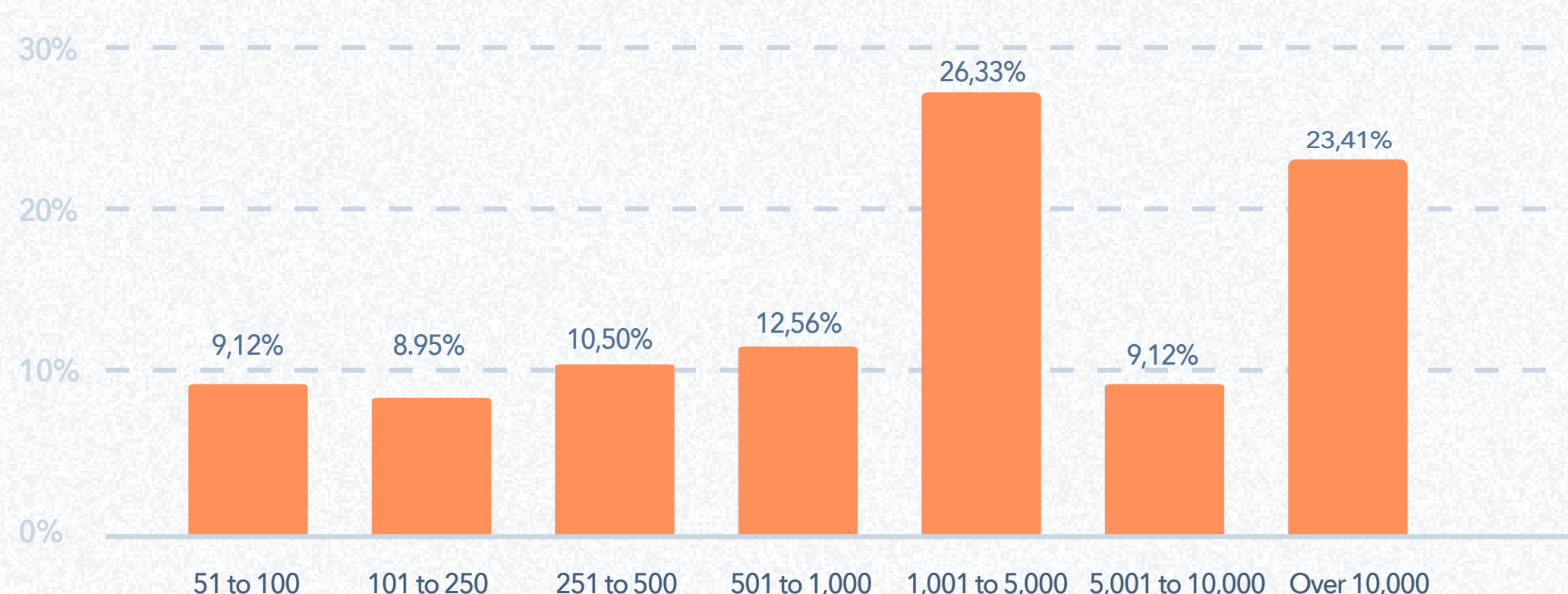
## Industries Represented

- Advertising or marketing
- Agriculture, food, and beverage
- Business or consumer services
- Chemicals and metals
- Construction
- Consumer product manufacturing
- Education and nonprofits
- Retail
- Technology/software
- Telecommunications services
- Electronics
- Energy, utilities, and waste management
- Financial services and insurance
- Government
- Healthcare
- Manufacturing and materials
- Marketing agency
- Media and leisure
- Transportation and logistics
- Travel and hospitality
- Other (please specify)

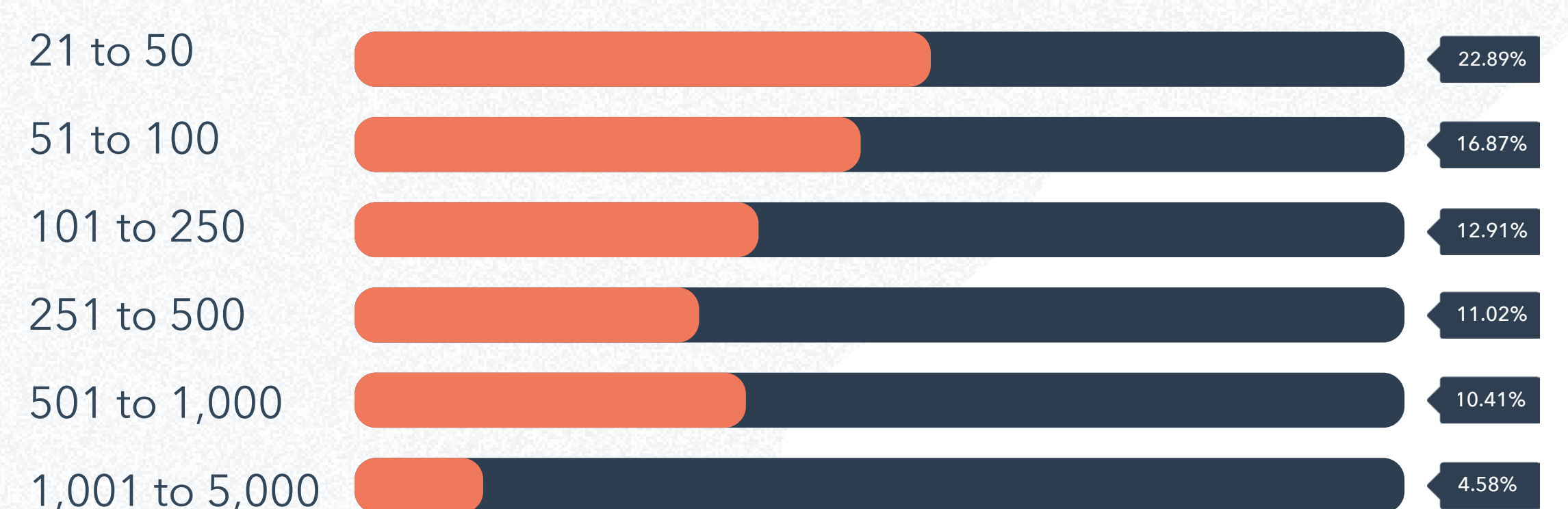
## Level of Seniority



## Company size (# of employees)



## Size of your company's sales team (# of employees)





HubSpot Sales Enablement Survey:

# Rebuilding the UK's new business pipeline







**Globally 40% of businesses are expecting to miss their revenue goals this year, and only 22% expect to meet their goals. For many the word of the year has not been growth, it has been survival.**

In the first in a series of country specific reports, we explore how optimistic businesses are about their growth over the coming months, and how they are handling new business prospects and leads in the wake of the pandemic.

**UK Overview:** 2020 has been a testing year for a lot of companies. The almost overnight shift to remote working and fluctuating regulations and lockdowns have made building up any kind of momentum extremely difficult. The targets and goals set out for the year have had to soften, and the focus for businesses now as we enter a second period of nationwide lockdown is on looking to and working through the 'new normal'.

We have looked at three key areas which have been affected by COVID-19, and this first report looks at how the new business pipeline has changed. The ability to be flexible has never been more important, and during these difficult times, optimism is critical, as is a clear path to growth and to ensuring the drive for new business leads and prospects continues with urgency.



# The struggle to reach sales targets

The stark truth is that three fifths (58%) of UK sales representatives think it will be more difficult to reach their sales targets as we come to the end of the calendar year and 25% of respondents are not hitting their sales targets. 11% of those surveyed don't think they will meet any of their targets and a further 12% reported that they are not hitting their targets at the moment, but they were meeting them before March 2020. The shift to remote selling is the primary reason for missing targets. 48% of UK businesses have not made any changes to support it and nearly two thirds (64%) of respondents report finding it more difficult to build relationships with prospects due to having less face-to-face content, by far the most reported reason.

This is reflected when we look at how different sizes of business are responding. Smaller businesses are struggling the most in the 'new normal'. 39% of sole traders and micro (up to 9 employees) businesses are not hitting any sales targets, which is double the percentage compared to companies with 10 or more employees (18%). Sole trader and micro businesses also are the most likely to not have enacted any changes to support remote selling at 73% compared to 34% for large companies (250+).

There are some regional differences too. 40% of London based respondents reported that they were not hitting any sales targets, the highest percentage of any region we surveyed.

// There are real lessons for businesses to take from this period of forced remote work around the potential business impact of not adapting and ensuring sales teams have the tools they need to operate. Management teams need to take a good look at the competencies of their sales representatives and identify where they need support - from the tools necessary to truly interact with and understand their customers, who are now one step more removed than normal, to refining their techniques for remote selling. //

**CHRISTIAN KINNEAR**  
VP of Sales & Managing Director EMEA

**HubSpot**





# Optimism coming on strong from younger sales representatives

But while the situation is difficult, there is optimism to be found especially amongst younger members of the UK sales workforce. 34% of 18-40 year olds feel that it will be easier to meet their targets over November and December, compared to just 8% of over 55s. There is also some variation across seniority when it comes to optimism. Sales representatives and Sales Leaders are the most optimistic with 27% believing targets will be easier. This compares to just 15% of Heads of Sales. This potentially reflects the more positive conversations that are happening between sales prospects and representatives, which is not yet filtering up the managers who are still concerned about the bigger picture.

While 49% of over 41 year olds feel their certainty has decreased when it comes to respondents' feelings about converting their prospects to leads, the good mood only gets stronger with 59% of 18-40 year olds saying their certainty has remained the same as before the pandemic.



**34% of 18-40 year olds feel that it will be easier to meet their targets over November and December, compared to just 8% of over 55s.**



# The long road to recovery

We cannot deny that a lot of companies have been through a serious shock over the last year. 56% of respondents reported that their new business pipeline has been reduced due to COVID-19 and on average they expect it will take 12 months to recover to pre-COVID levels. The length of time to complete a deal has also increased from 1.7 months on average pre-COVID to 2.4 months now.

This is borne out in the top 6 business goals for the next year:

- **Win new clients (57%)**
- **Sell into new markets (22%)**
- **Increase sales to a specific product line (20%)**
- **Increase the average sales price for deals (20%)**
- **Change/improve established sales processes (15%)**
- **Enable sales teams to sell remotely long-term (15%)**

Over a fifth of UK companies looking to sell into new markets shows how companies who are able to be flexible and react to the new marketplace are best placed to succeed in 2021. While the sectors in which companies see growth have remained largely stable, a diversified portfolio shows promise to a lot of companies, especially as winning new clients is the top business goal for 57% of companies. Entering new markets offers the opportunity to engage with prospects that some businesses have not previous relationships with; a daunting task but one that can seem appealing if their existing markets are reducing spending or feeling a bit crowded.

It is interesting to see that enabling remote-selling long-term, while a top 6 priority is certainly at the lower end of the spectrum. The majority of companies do seem to see remote selling as a temporary stop gap until trade events and other face-to-face selling methods become available again.

**56% of respondents reported that their new business pipeline has been reduced due to COVID-19 and on average they expect it will take 12 months to recover to pre-COVID levels.**





## Conculsion

Businesses across the UK have taken a hit, but there is optimism and resilience in spades across all sectors. It is great to see that younger and more junior respondents have remained resilient and are a driving force of optimism across the UK, something that they can hopefully share across their organisations.

A positive note for the future is that nearly a quarter of UK businesses are looking to move into new markets. While they have had their hands forced by the pandemic, this is a move that will serve them well in the future even once COVID-19 is brought back under control.

As businesses look to dramatically bolster their new business pipelines, investing in remote selling technology and support should be seen as a long-term investment rather than a necessary cost in the short term. With better remote working tools, businesses can attract a broader pool of employees, offer better workplace flexibility and ensure they are ready for any future lockdowns. Taking all of these points together there is cause for optimism across the country that as we enter 2021, businesses of all sizes will be attracting new clients and getting on the path for growth.



// While there is no silver bullet for businesses looking to recover from the impact of the pandemic, our report shows that companies need to be thinking about how their teams are able to engage with customers in the remote world, just as much as they are watching markets shift and diversifying their products. With the need to fill a depleted pipeline pushing businesses into new markets, and with fewer routes to speak to prospects, sales teams rely on CRM tools more to support their sales techniques and land a sale. Management teams need to lead by example and take responsibility to drive the necessary change in the shift to remote working - they cannot expect their sales reps to somehow figure it out themselves. //



**CHRISTIAN KINNENAR**  
VP of Sales & Managing Director EMEA





## Appendix

"Inside Sales vs. Outside Sales: How to Structure a Sales Team."  
7 Apr. 2020, <https://blog.hubspot.com/sales/inside-vs-outside-sales>. Accessed 19 Oct. 2020.

"The State of Sales, at Arm's Reach: Download the Pocket Guide." 29 Sep. 2020, <https://www.linkedin.com/business/sales/blog/b2b-sales/the-state-of-sales-at-arms-reach-download-the-pocke-guide>. Accessed 20 Oct. 2020.



# Credits

This report was an exhaustive effort from a bunch of humans who care about the work they put into the world. We wanted to create a report that both captured the difficulty of 2020, and outlined a way forward for sales teams. We hope it helps you in some capacity.

Here are those people:

---

Kyle Denhoff	Phil Nacionales
Emmy Jonassen	Pam Bump
Kieran Flanagan	Lestraundra Alfred
Chris Eberhardt	Nathaniel Medina
Margot Mazur	Alicia Collins
Matthew Watkins	Jennifer Proud
Peter Riedle	Matthew Brown
Kara Ebrahim	Mark Whelan
Noel Kelly	Sammi Kim
Diego Polanco	Leslie Ye
David Carberry	Odette Santos
Liz Villate	Alex Moran



# Unite your teams unlock your potential



Sales Hub Enterprise

[Learn more about Sales Hub Enterprise](#)

“As the global leader in online social fundraising, GoFundMe Charity helps nonprofits raise funds for important causes. Sales Hub Enterprise has allowed our team to reduce the volume of manual work in their roles, automate the onboarding experience for our new platform users, and dedicate more time to understanding the needs of the nonprofits we serve. The reporting tools are powerful, and help us make informed decisions to increasingly provide value to our nonprofits.”

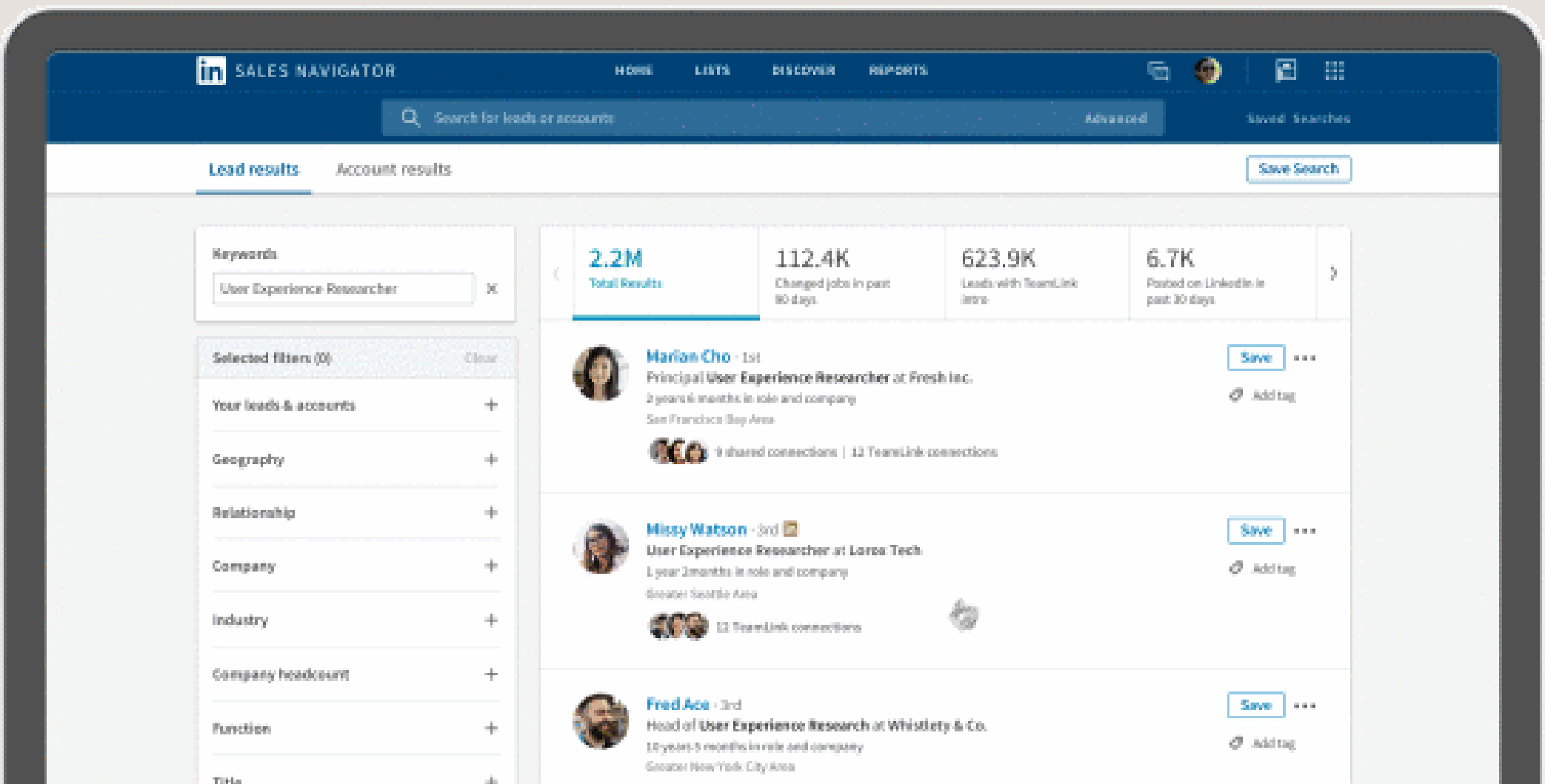
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